

KSU Foundation – Funds Transfer
Electronic Transfer Request Submittal Process
Aug. 2019

The purpose of this document is to provide an overview and instructions on how to electronically submit transfer requests to the KSU Foundation accounting department. The transfer request e-Form is to serve as a mechanism for the Foundation to receive campus transfer requests electronically and load them automatically into our Accounting workflow.

The KSUF Accounting form that is required to be submitted electronically is the **KSUF-8 Fund Transfer Request Form**.

Software Requirements: an Internet Web Browser (Chrome, Firefox, Safari, IE/ Edge, Opera)

HOW TO SUBMIT A TRANSFER REQUEST ELECTRONICALLY

PLEASE NOTE: Only one transfer is allowed for each electronic submittal. A new submittal e-form should be completed for each transfer.

1. Scan the **approved** KSUF-8 Transfer Request form with all supporting documentation into one PDF file.
2. Open the file to be sure the approved KSUF form is the first page of the file; and it has been scanned right-side up (not upside down) and is legible.
3. Save the PDF file into a location where you will be able to browse for later to be used as attachment(s) to the submittal e-form.

4. Copy the entire e-Form link below into any web browser address bar.

<https://fdninweb.found.ksu.edu/imagenowforms/fs?form=Transfer%20Request%20Form>

5. Complete the submittal e-Form (example shown below).
 - a. Please enter Transfer Date and Submitted By in the fields provided.
 - b. Enter the fund that is being transferred out of in the "Transfer From" field.
 - c. Enter the fund that is being transferred into in the "Transfer To" field.
 - d. Enter the total amount being requested for transfer in the "Total Amount" field.
 - e. The "**Emails To Receive Alerts**" field is to be completed if you want to get an email notification letting you know that your request is sent through the Foundation system. Note: use "," (comma) between multiple emails, such as joes@ksu.edu, johnd@ksu.edu.
 - f. The "**Brief Notes For Accounting**" field only allows 128 characters to send to the Foundation system.

Fund Transfer Request Form

Attachments! A delay may occur in processing if all supporting documents are not attached to this form.

Request Information

Transfer Date	<input type="text"/>
Submitted By	<input type="text"/>
Transfer From	<input type="text"/>
Transfer To	<input type="text"/>
Total Amount	<input type="text"/>
Emails To Receive Alerts (use , between emails) :	<input type="text"/>
Notes	<input type="text"/>

6. Next, click on the “Attachment” button at the bottom of the screen. Then click on the “Add” button.



- Browse to the location that you saved the transfer request PDF file(s)
- Select the file(s) and click on the “Open” button
- You will see the file(s) you selected in the window. Confirm the correct file(s) were added that support the transfer request e-Form you are submitting, and click on “OK”.
- The attachment button will reflect the number of files in parenthesis you’ve selected to be attached to the e-Form.



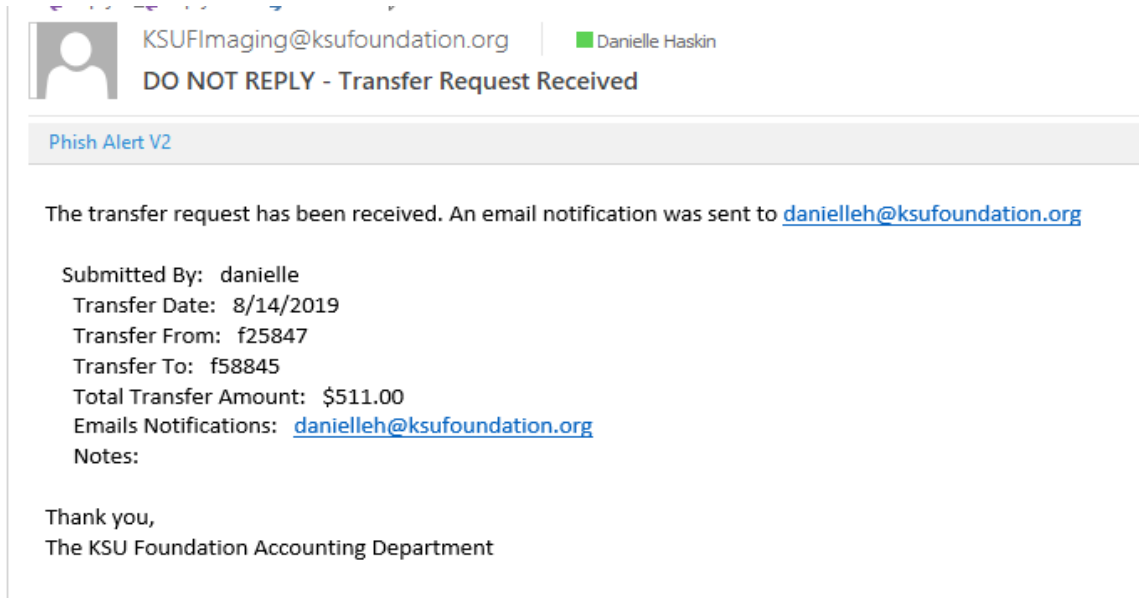
7. Optional steps:
 - a. You may click the "Print" button at the bottom of the screen to print the form; or
 - b. You may click the "Reset" button to clear out all the fields and start over again.
8. Final step: Click the "Submit" button at the bottom of the screen.
 - a. The message box "From saved successfully" notifies you that the request was sent and received into the KSU Foundation's workflow successfully.



- b. A new blank form is loaded to speed up multiple request submission.
- c. If you have entered any email addresses in the “**Emails To Receive Alerts**” before you submitted the form, an email notification would be sent to those emails to let them know that your request has been received by the Foundation’s system.

Emails To Receive Alerts (use , between emails) :

Below is an example.

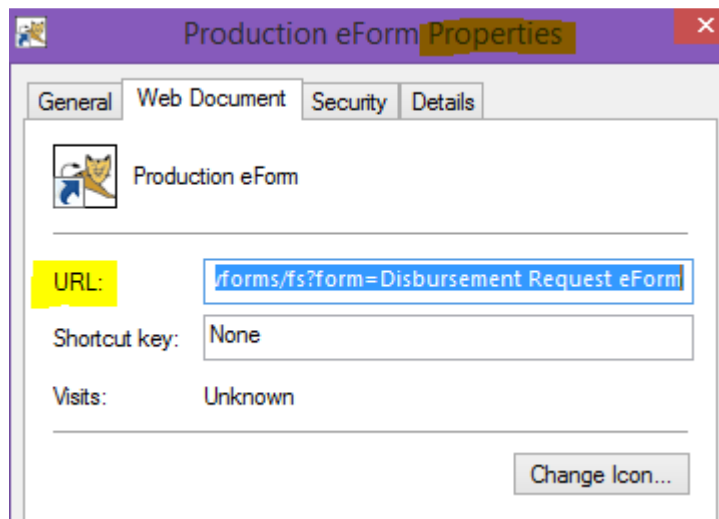


How to get to the e-Form and other Accounting forms

The “Electronic ~~Transfer Request Submittal Form~~”, along with this document and other Accounting forms, can be found on the Foundation’s website. Please bookmark the “Accounting Forms & Policies” page via the link below and you shall be able to find the form in the middle of the page.

http://www.found.ksu.edu/financials/accounting_forms.html

If you do want to bookmark the form itself, make sure the url of the bookmark properties is <https://fdninweb.found.ksu.edu/imagenowforms/fs?form=Transfer%20Request%20Form>. If you need assistance in bookmarking the form page itself, please call the IT support at (785) 775-2222.



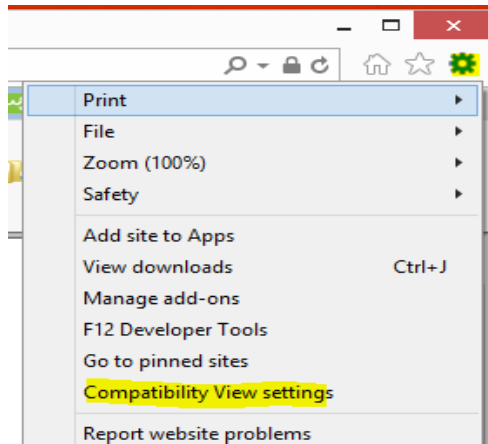
A Note on using a web browser

PLEASE NOTE: Any major modern Internet web browser, e.g. Chrome, Firefox, Safari, Internet Explorer, Edge or Opera, can be used to submit a disbursement request!

If you use a web browser other than internet explorer, please skip the rest of this document.

If using Internet explorer, make sure the form is not in the compatibility view mode. You may check this via the following steps.

1. Load the disbursement form
2. Click the gear icon on the top right-hand of the page, then click “Compatibility View settings”



3. Make sure that
 - a. ksu.edu is not showing in “Websites you’ve added to Compatibility View:” section; and
 - b. “Display intranet sites in Compatibility View” is not checked.

