

KU Endowment Account Reporting System

IFAS

End-user Setup

Note: For this setup, please be sure to have your computer technician or other technical resource handy. Some of these steps may require administrative security privilege to be correctly installed.

Also, please note that these instructions assume use on a PC and for Internet Explorer version 6 or higher. Other browsers are not compatible with IFAS.

Initial Set up

Before you connect to IFAS:

Before you attempt to connect to IFAS, there are a few settings that you will have to change in Internet Explorer.

:s T	ools Hele	In Internet Explorer
Site	Delete browsing history	click on Tools >
	InPrivat Proving	Internet Options
	Lastrass Send to OneNote	
		10.0

Internet Options	
General Security Privacy Content Connection	On the Security tab
	on the becamey tub
Select a zone to view or change security settings.	
Internet Local intranet Trusted sites Restricted sites	Click Trusted Sites
Trusted sites	
This zone contains websites that you Sites	
your files. You have websites in this zone.	Then click Sites
Security level for this zone	
Allowed levels for this zone: All	
- Low - Minimal safeguards and warning prompts are provided Montestable to develop ded and the utility to constant	
All active content can run	
- Appropriate for sites that you absolutely trust	
Enable Protected Mode (requires restarting Internet Explorer)	
Custom level Default level	
Reset all zones to default level	
OK Cancel Apply	
Tourisd sites	1
	1 Uncheck Require
You can add and remove websites from this zone. All websites in	server verification
this zone will use the zone's security settings.	
Add this website to the zone:	¥ /
*.kuendowment.org	
	2. type:
Websites:	*.kuendowment.org
Rem	and click Add .
Require server verification (https:) for all sites in this zone	3. Click OK
Close	
	J

ms Advanced
Sites
To confirm settings,
click Custom Level
provia
prompts
st
Explorer)
ult level
ult level
Apply
x
If it is not already listed
change settings to Low clic
D to LOW, Che
Reset , and OK .
- / /
Rest
Refet
Rejet
Rejet Cancel



Testing your set up

The following procedure is for testing your setup only. *The username and password shown below is only for testing use.* Log into the IFAS server at this address:

http://www.kuendowment.org/ifas



Incorrect Browser				
You do not appear to be running Internet Explorer.[mozilla/5.0 (windows nt 6.1; wow64; trident/7.0; rv:11.0) like gecko]				
Please upgrade to Microsoft Internet Explorer 5.5 SP2 or greater.				
Checking for updated requirements from www.sungardbi-tech.com Unable to connect. Please upgrade to the latest Microsoft Internet Explorer.				
	orrect this error, go to Tools > Compatibility view settings:			
	orrect this error, go to Tools > Compatibility view settings: ols Help Delete browsing history Ctrl+Shift+Del			
	orrect this error, go to Tools > Compatibility view settings: ols Help Delete browsing history Ctrl+Shift+Del InPrivate Browsing Ctrl+Shift+P			
	orrect this error, go to Tools > Compatibility view settings: ols Help Delete browsing history Ctrl+Shift+Del InPrivate Browsing Ctrl+Shift+P Turn of Tracking Protection			
	orrect this error, go to Tools > Compatibility view settings: ols Help Delete browsing history Ctrl+Shift+Del InPrivate Browsing Ctrl+Shift+P Turn of Tracking Protection			
	orrect this error, go to Tools > Compatibility view settings: ols Help Delete browsing history Ctrl+Shift+Del InPrivate Browsing Ctrl+Shift+P Turn of Tracking Protection Sma en Filter Manage add-ons			
	orrect this error, go to Tools > Compatibility view settings: Ols Help Delete browsing history Ctrl+Shift+Del InPrivate Browsing Ctrl+Shift+P Turn or Tracking Protection Smaen Filter Manage add-ons Compatibility View settings			

Compatibility View Settings	
Change Compatibility View Settings	
Add this website:	
kuendowment.org	Add
Websites you've added to Compatibility View:	
	Remove Type kuendowment.org into the Add this website box and click Add.
	Click Close.
Display intranet sites in Compatibility View	
✓ Use Microsoft compatibility lists	
Learn more by reading the <u>Internet Explorer privac</u>	<u>v statement</u> Close
	V

Connect to ifas IFAS User: campusus IFAS Password: •••••• State Connect to ifas	At the Connect to ifas screen, enter: User: campusus Password: campusus1 click Login or press Enter.
This login and password are for testing purposes only. You will be assigned your permanent login.	8 Help

Third-Party Pop-up Blockers

Although the Internet Explorer pop-up blocker has been turned off for this site (through the Trusted Site security settings), some third-party pop-up blockers, like the Google toolbar, do not have an editable "white list" of sites to allow. Here is a tip on how to allow the pop-ups from reports:

Google - C Search - 🚿 🔊 308 bloc	ked 🔽 Options 🖉
Connect to ifas	Click this button to always allow popups on kuea 10.kuendowment.org
At the IFAS login screen, click the Popups button to allow pop-ups for the site.	To let an individual popup through, press the 'Ctrl' key while clicking on a link.
If your third-party pop-up blocker does have an the allowed domains.	editable white-list, add "*.kuendowment.org" to

Continue testing:

Command Favorites Jobs +				
E Favorites	avorites Click the "+" next to: Reports > Campus			
📺 💼 Workflow	kflow Reports > Account Background > Account			
FAS Information				
Reports	Information.			
E. Campus Reports				
🖻 🔄 Account Background				
🕀 🖉 Account Attributes-Academic Unit	For the Account number			
Account Attributes-Account Type Grou				
E Account Attributes-Campus Location	enter: 30940 (remove the *)			
Account Attributes-FAR Title				
Account Attributes-Purp				
Account Information				
E S No Criteria; Select All				
Account Number (List values sep	by commas): 30940			
Rey word in fund name (All CAPS	surround with asterisks e.g. *JONES*) *			
	*			
Academic Unit (List values sep. d	/ commas or use pick list): * *			
Account Type Grouping (List value)	* *			
Campus Location (List values set	by commas or use nick list! *			
PAR Inte (List values sep. by cor	Click Submit			
······································				
H W Choose / select code				



ActiveX Controls			
When a report is first displayed on the screen, you may get this Security Warning:			
😨 This site might require the following ActiveX control: 'SunGard Bi-Tech Printing Control' from 'SunGard Bi-Tech Inc.'. Click here to install 🗙			
Internet Explorer - Security Warning			
Do you want to install this software?			
Name: SunGard Bi-Tech Printing Control Publisher: SunGard Bi-Tech Inc.			
More options			
While files from the Internet can be useful, this file type can potentially harm your computer. Only install software from publishers you trust. <u>What's the risk?</u>			
This installs an ActiveX program that controls the buttons on the toolbar on the Report page and printing controls. This is a program by SunGard/Bi-Tech (the authors of IFAS) that you can safely install. Click the Install button to continue.			
Clicking "Don't Install" will display the page, but portions will not work correctly.			

	Account Information
	Kansas University Endowment Association Account Information
Account 30940	Name TEST FUND
AccountType Purpose Academic Unit Campus Location FAR Title FAR Name	Expendable Start Date 6/30/2003 Investment End Date Not Specified Old Fund Number 056430.00 Lawrence Campus KUEA
Comment This Fund Is So Donec neque. In Vivamus tincidu Aliquam felis ma nec sapien in lib turpis, a egestas	Iely To Facilitate Programming In Ifas. Lore iteger eu lacus pretium velit dictum condim int, libero eu egestas molestie, diam lectus assa, pretium et, tincidunt quis, sollicitudin nec, lorem. Nullam ultrices. Aenean convallis. Donec pero consectetuer sollicitudin. Donec pretium, elit vitae eleifend rutrum, metus nulla ultricies s nibh nibh vestibulum felis. Fusce portitior tempor velit.
↓ <u>.</u>	

- If the report did not display correctly, or if the reporting window did not appear, you may have a pop-up blocker still turned on.
- If you are having trouble with the installation and if your technician is not able to help you, please contact the KU Endowment Association Help Desk at 785-832-7388.

When you are done, close the report window (by clicking on the X in the upper right corner), and on the IFAS home page, logout:

Home - SunGard - ifas	×			₼ ☆ ฿
4 ~ ~				
5			Preferences	Help Logoff
·				
		Click Log Out		

Desktop Icon Setup

Please note: Creating an icon through Internet Explorer (File > Send > Shortcut to Desktop) or creating a Favorite in Internet Explorer may not work correctly. Access to this system is controlled by server redirection.

To assist you in getting to the IFAS system, you can create a desktop shortcut icon:

	View	 	Folder Shortcut Microsoft Access Database Bitmap in ge
	Sort by Refresh Paste		Microsoft and Document Journal Doment Microsoft erPoint Presentation
s	Paste shortcut Undo Copy Ctrl+Z Shared Folder Synchronization		Microsoft her Document Text Docur Microsoft orksheet
	New Screen resolution Gadgets Personalize		Briefcase
	Ri Do wl Cl	ght-c esktop nich a ick N	click on a blank area of the p. On the mini-menu appears: few > Shortcut

Create Shortcut	
What item would you like to create a shortcu	ut for?
This wizard helps you to create shortcuts to local or netwo Internet addresses.	ork programs, files, folders, computers, or
Type the location of the item:	
http://www.kuendowment.org/ifas	Browse
Click Next to c	
Type in:	
http://www.kuendowment.org/ifas	Click Next
	Next Cancel
	h.
🚱 д Create Shortcut	×
Create Shortcut What would you like to name the shortcut?	Enter a meaningful name for the shortcut.
Create Shortcut What would you like to name the shortcut? Type a name for this shortcut:	Enter a meaningful name for the shortcut.
Create Shortcut What would you like to name the shortcut? Type a name for this shortcut: KU Endowment IFAS	Enter a meaningful name for the shortcut.
Cick Finish to create the shortcut.	Enter a meaningful name for the shortcut. Click Finish
Create Shortcut What would you like to name the shortcut? Type a name for this shortcut: KU Endowment IFAS Click Finish to create the shortcut.	Enter a meaningful name for the shortcut.
Create Shortcut What would you like to name the shortcut? Type a name for this shortcut: KU Endowment IFAS Click Finish to create the shortcut.	Enter a meaningful name for the shortcut.
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