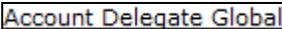
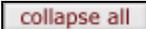




Adding Account Delegates on Multiple Accounts

Navigation: KFS > Main Menu > Lookup and Maintenance > Chart of Accounts > Account Delegate Global

Step	Action
1.	To scroll down, click the scrollbar .
2.	Click the Account Delegate Global link. 
3.	Before you begin, you can choose to click the collapse all button in the upper right hand corner. Click the collapse all button. 
4.	Important! Adding delegates with this document <u>overwrites any existing delegates</u> . If you want to retain existing delegates, you must include them on this document, in addition to any new ones you want to add.
5.	To open the Edit Global Delegate tab, click the show button. 
6.	Enter the Document Type that you want the delegate to approve. Enter "KFS" a valid value in the Document Type Name field.
7.	By checking the Account Delegate Primary Route box, you are identifying the delegate as a Primary Delegate . Leaving it unchecked assigns the delegate as a Secondary Delegate .
8.	You can leave the current date as the Account Delegate Start Date , or you can set the delegate to begin on a future date.
9.	Enter the Directory ID of the person you are delegating the work to. You can search for the person's directory ID by clicking the magnifying glass.
10.	You can enter a value in the Approval From This Amount and/or Approval To This Amount fields. If you leave the fields blank, there are no limits to the transactions that the delegate approves. It is recommended to leave the fields blank.

Step	Action
11.	Click the add button. 
12.	Continue to add Delegates as needed.
13.	To scroll down, click the scrollbar .
14.	You can see the added delegates.
15.	This is very important: Once this document is finalized, the delegates here, on this document, will be the only delegates for the accounts chosen. If there is a pre-existing delegate on the account(s), that delegate will be deleted .
16.	To scroll down, click the scrollbar .
17.	To close the Edit Global Delegate tab, click the hide button. 
18.	Now you need to identify which account(s) you want the delegate to approve documents for. Click the show button. 
19.	You can add accounts one at a time, or you can add them all at once by using the Lookup/Add Multiple Account Lines magnifying glass. Click the Look Up/Add Multiple Account Lines button. 
20.	To find all accounts belonging to a specific Fiscal Officer , enter that Fiscal Officer's Directory ID in the Fiscal Officer Principal Name field. Enter a valid value in the Fiscal Officer Principal Name field.
21.	Click the search button. 
22.	For more help on using this search screen, view the Using Wildcard's to Conduct a Search tutorial. Click the select all rows from all pages button. 
23.	Please note: This document can only update 24 accounts. If the results contain more than 24 accounts, select the first 24 and note where you left off. The remaining accounts will be added to another document.
24.	Click the return selected button. 

Step	Action
25.	Save the document.
26.	Check the Route Log, to note where the document will route for approvals
27.	Submit the document. Once it has gone through the appropriate approvals, the delegates will be able to start approving documents on the start dates identified.