Account Delegate Global Document
Quick Reference

Document Overview
Description: Add a brief description for the Account Delegate Document. This field is limited to 40 characters.
Explanation: Additional detail on why the Account Delegate is being created. This field has an unlimited number of characters.

Edit Global Delegate
Document Type Name: This is the document type that the delegate will be able to review. We recommend KFST for all KFS transactional Documents.
Account Delegate Primary Route: When this box is checked, the delegate will be the Primary Delegate on the accounts and documents will appear in their action list.
Account Delegate Start Date: This should be the current date
Account Delegate Principal Name: The net ID of the person who you would like added as a delegate
Approval From/To This Amount (Not Required): This allows you to set dollar amount limits for documents that the delegate will be able to approve
Add: You must click add to ADD the delegate to the document.

Adding Multiple Delegates: Clicking the “Add” button will add the delegate information to the document. You can add multiple delegates to the same document. An Account Delegate Global Document will overwrite all other Delegates on the account. You will need to add every necessary delegate, even if they are currently a delegate on the account.
Adding Multiple Accounts: If you click the magnifying glass here, the “Account Lookup” Screen below will appear to add multiple accounts.

Chart Code: Always select “UA-University of Arizona Management.”
Account Number: Enter the account number for which you would like to add a delegate.
Account Name: This field should populate automatically when an account number is entered.
Add: This will add the account to the document, you can repeat the steps above to manually add multiple accounts or click the magnifying glass in the corner to add multiple accounts at once.

Account Lookup: This page allows you to search for multiple accounts using parameters such as Organization Code, Fund Group Code, Fiscal Officer name and many other ways.

In this example we will search by Organization code “9990” to pull up all the active accounts that are in Organization 9990.
Account Lookup: When you have completed a search, a list of account results should appear like above. Check the “Select?” box next to the accounts you want to add a delegate to. Once you are finished selecting accounts, click “Return Selected” to the initiated document.

NOTE: Please never add more than 100 accounts on one document. This can lead to system errors with the documents. We recommend submitting multiple documents if necessary.
**Edit List of Accounts:** After you have manually added accounts or used the “Look Up/Add Multiple Account Lines” function add accounts, the accounts will appear as seen below. You will be able to verify and delete accounts individually if necessary.

![Edit List of Accounts](image)

**Submit:** Click to submit the document. After submitted, the status of the document will change from “Initiated” to “Enroute.” It will be routed for approval or acknowledgement.

**Save:** Use when a document is initiated but not yet complete. Saving allows it to be opened later for completion. **Note:** All saved documents are canceled after 90 days of no activity.

**Close:** This will close the document without submitting it. It will not save any new changes made to the document.

**Cancel:** This will cancel the document. A message will prompt you to confirm you want to cancel the document. Canceled documents are void, cannot be modified in any way, and do not route for approval.