

Quick Reference Guide: Creating an Account Delegate

Instructions: Use the following steps to create an **Account Delegate**. This guide instructs you on how to:

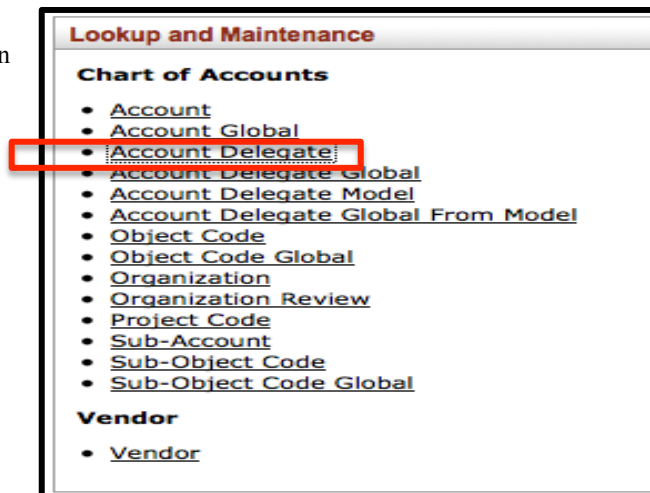
- Create a new Account Delegate or
- Deactivate an existing Account Delegate

For more detailed information, please refer to **Creating an Account Delegate Job Aid**.

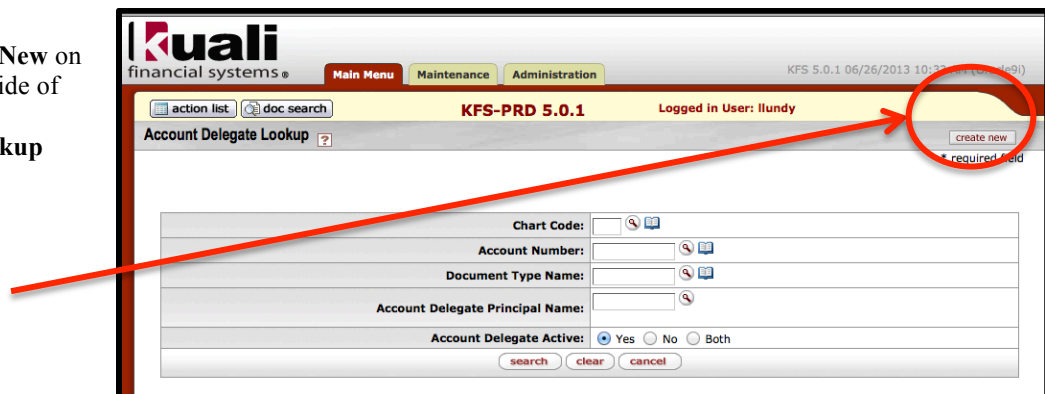
Note: An asterisk (*) denotes a required field.

To create a new **Account Delegate**:

1. Select **Account Delegate** under **Chart of Accounts** on the **KFS Main Menu**.



2. Click **Create New** on the top right side of the **Account Delegate Lookup** screen.



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3. Enter the Account Delegate's name for the **Description** on the **Account Delegate** screen.
4. Type in the business purpose and account number for the **Explanation**.

5. Enter **IS** for the Chart Code.
6. Enter the **Account Number** for which you will delegate responsibility.
7. Enter **KFS** as the **Document Type Name**.
8. Enter the Account Delegate's NetID for the **Account Delegate Principal Name** or look it up using the looking glass icon.

9. Click the calendar icon to choose an **Account Delegate Start Date** or leave it blank to make it effective immediately.

Steps 13-16 Optional – To notify a user about Account Delegate responsibilities:

10. Click **show** on the **Ad Hoc Recipients** tab.
11. Select FYI from the Action Requested drop down box.
12. Type the Account Delegate's NetID in the **Person** box.
13. Click **Add** in the **Actions** box to add this request.

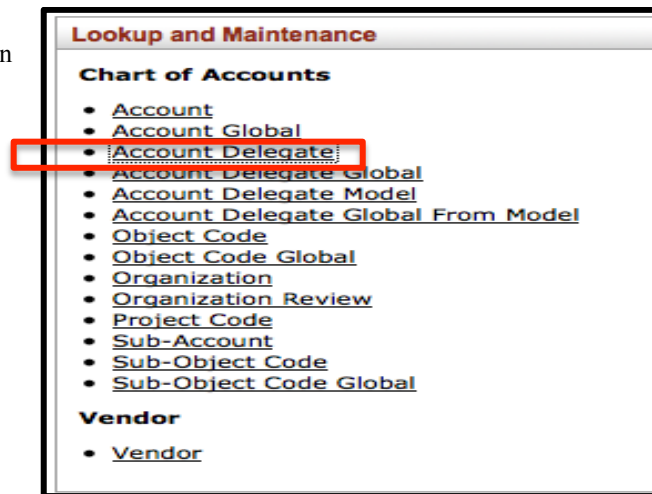
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14. Click **Submit** to route document to the Fiscal Officer on the account.



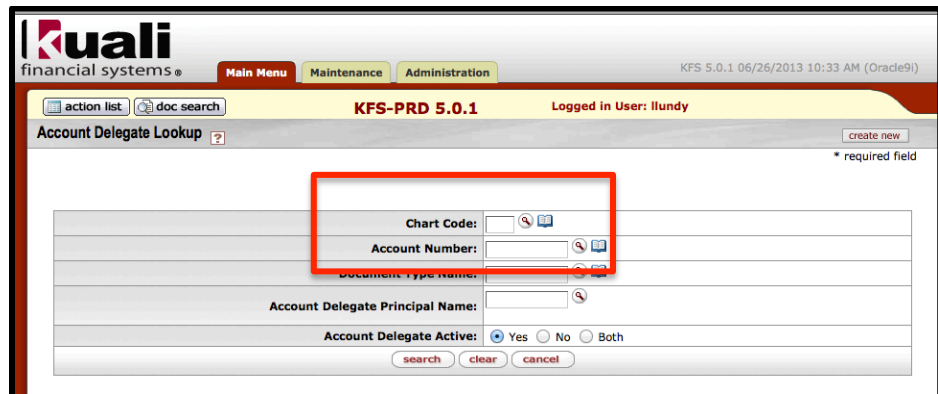
To deactivate an existing Account Delegate:

1. Click **Account Delegate** under **Chart of Accounts** on the **KFS Main Menu**.



2. Enter the **IS** for the **Chart Code**.
3. Enter the **Account Number** on the **Account Delegate Lookup** screen then click **Search**.

Note: This returns a list of **Delegates** on the account.



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- Click **Edit** next to person you want to change.

KFS-TNG 5.0.1 Logged in User: llundy

Account Delegate Lookup create new

* required field

Chart Code:

Account Number:

Document Type Name:

Account Delegate Principal Name:

Account Delegate Active: Yes No Both

2 items retrieved, displaying all items.

Actions	View	Chart Code	Account Number	Document Type Name	Account Delegate Principal Name	Account Delegate Active	Approval From This Amount	Approval To This Amount	Account Delegate Primary Route	Account Delegate Start Date
edit copy	View Account Delegate	IS	7992010	KFS	morth	Yes			No	07/29/2013
edit copy	View Account Delegate	IS	7992010	KFS	mbilistad	Yes			No	03/04/2013

Export options: CSV | spreadsheet | XML

- Enter the Account Delegate's name in the **Description** and reason for the change in the **Explanation**.
- Uncheck the **Account Delegate Active** box to deactivate your current Account Delegate.

Optimal: If you do not want the change to be effective immediately, enter a new **Account Delegate Start Date**.

KFS-TNG 5.0.1 Logged in User: llundy

Account Delegate Doc Nbr: 270484 Status: INITIATED

Initiator: llundy Created: 03:45 PM 06/24/2013

expand all collapse all

* required field

Document Overview hide

Document Overview

* Description:

Organization Document Number:

Explanation:

Edit Account Delegate hide

Old	New
Chart Code: IS	Chart Code: IS
Account Number: 7992010	Account Number: 7992010
Document Type Name: KFS	Document Type Name: KFS
Account Delegate Principal Name: morth - Orth, Magann	Account Delegate Principal Name: morth - Orth, Magann
Approval From This Amount: <input type="text"/>	Approval From This Amount: <input type="text"/>
Approval To This Amount: <input type="text"/>	Approval To This Amount: <input type="text"/>
Account Delegate Primary Route: No	Account Delegate Primary Route: <input type="text"/>
Account Delegate Active: Yes	Account Delegate Active: <input checked="" type="checkbox"/>
Account Delegate Start Date: 07/29/2013	* Account Delegate Start Date: 06/24/2013 <input type="text"/>

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7. Click **Show** on the **Ad Hoc Recipients** tab.

Optimal: Notification to the former **Account Delegate**.

8. Select **FYI** from the **Action Requested** drop down box.

9. Type the Account Delegate's NetID in the **Person** box.

10. Click **Add** in the **Actions** box to add this request.

Ad Hoc Recipients		
Ad Hoc Recipients		
Person Requests:		
* Action Requested	* Person	Actions
FYI	morth	add

11. Click **Submit** to route to the Fiscal Officer on the account.

submit save close cancel