Quick Reference Guide: Creating an Account Delegate

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

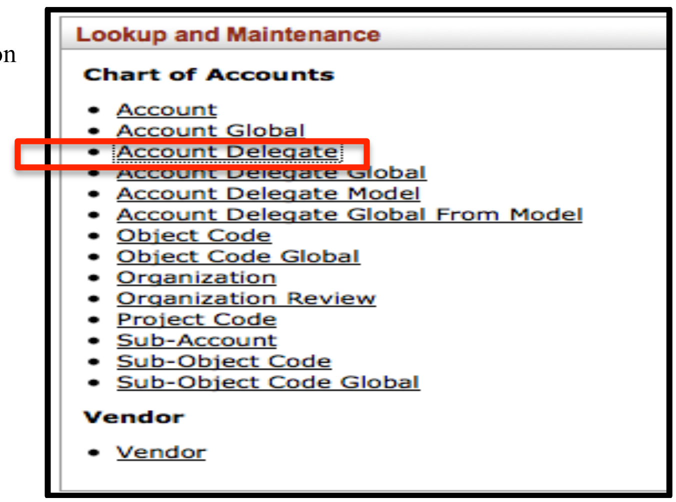
- Create a new Account Delegate or
- Deactivate an existing Account Delegate

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

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

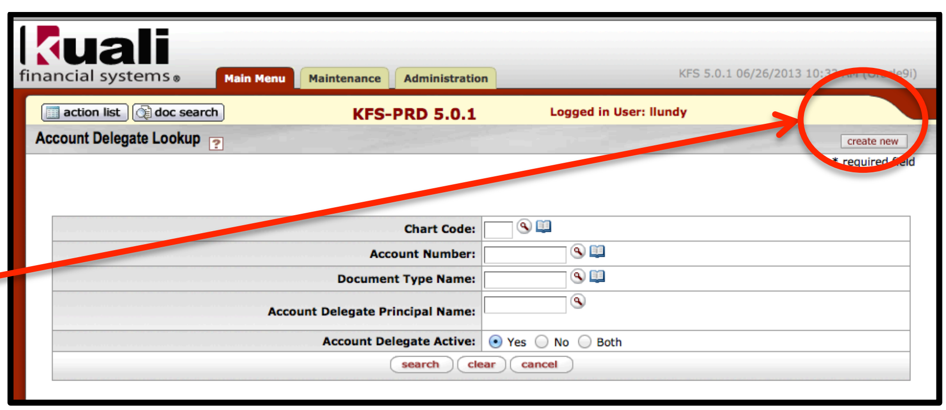
To create a new **Account Delegate**:

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.



Quick Reference Guide: Creating an Account Delegate

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**.

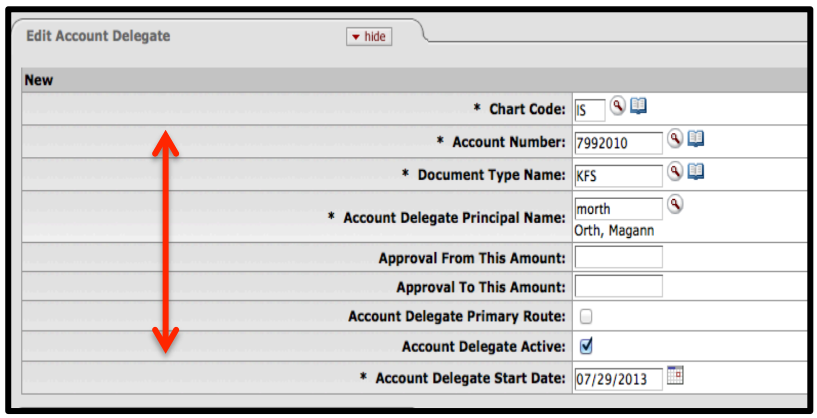
5. Enter **IS** for the Chart Code.

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.



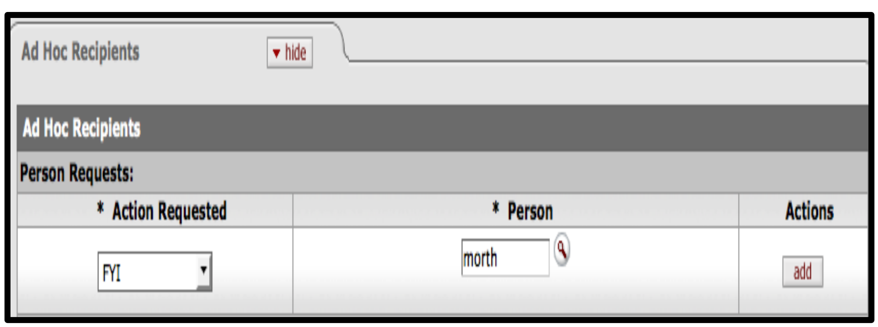
Steps 13-16 Optional – To notify a user about Account Delegate responsibilities:

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.

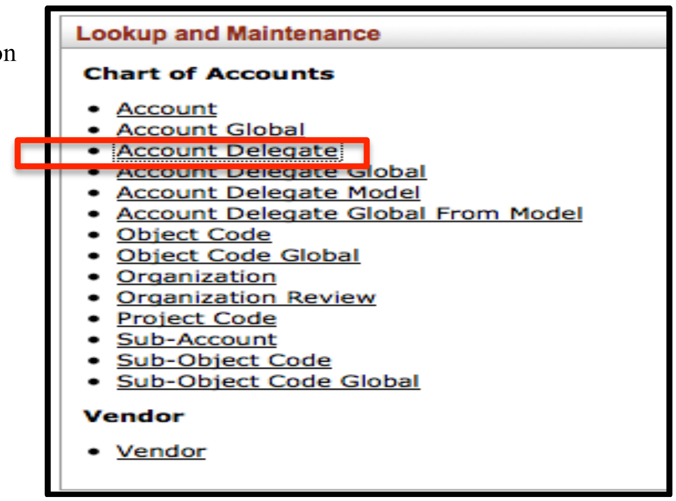


Quick Reference Guide: Creating an Account Delegate

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

To deactivate an existing **Account Delegate**:

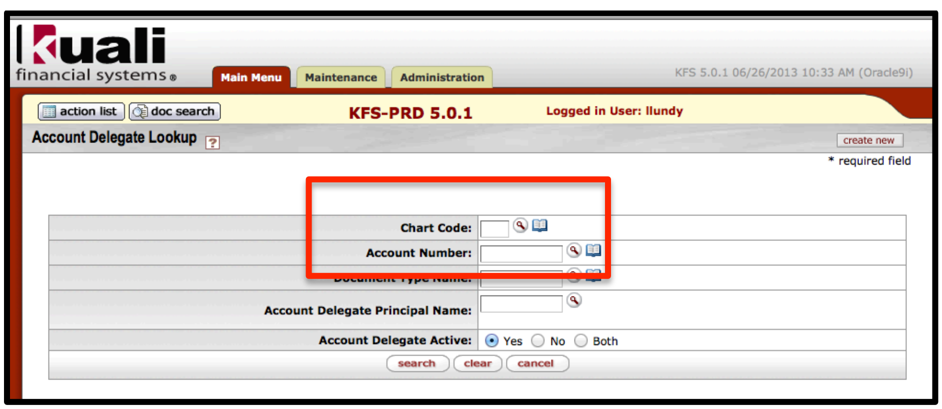
1. Click **Account Delegate** under **Chart of Accounts** on the **KFS Main Menu**.



2. Enter the **IS** for the **Chart Code**.

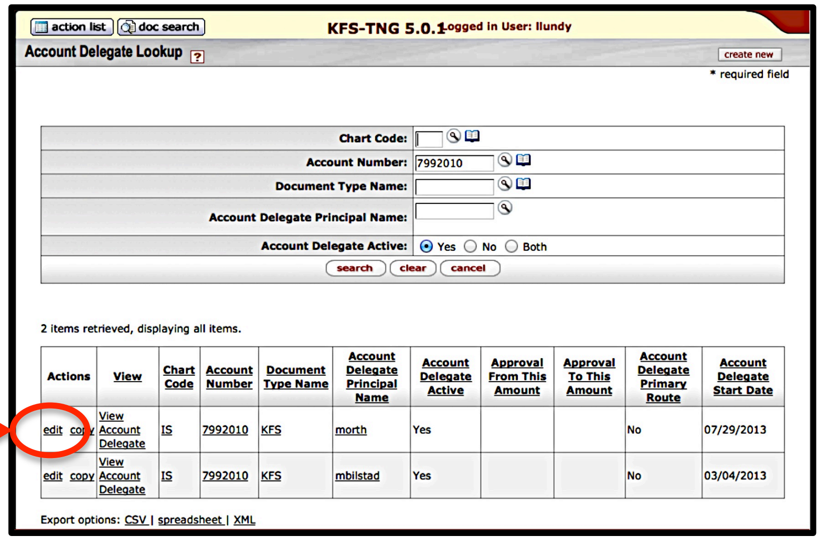
3. Enter the **Account Number** on the **Account Delegate Lookup** screen then click **Search**.

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



Quick Reference Guide: Creating an Account Delegate

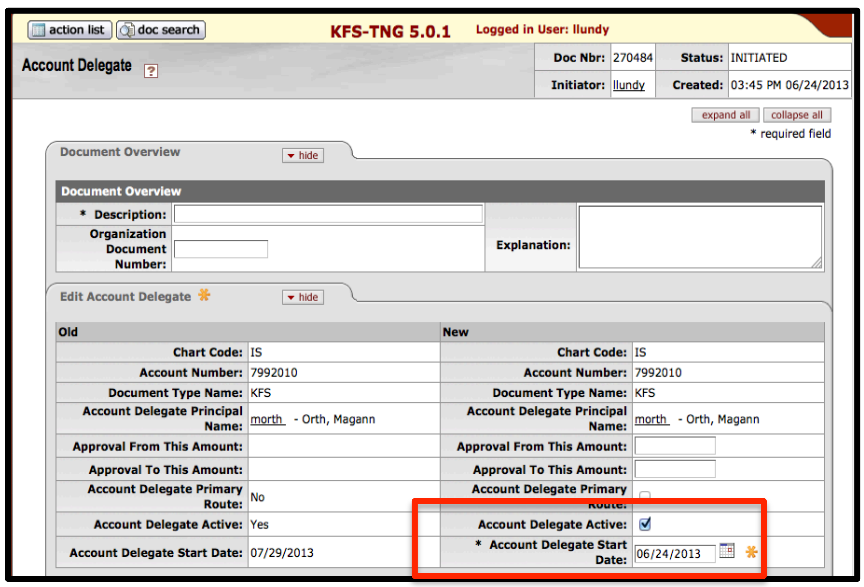
4. Click **Edit** next to person you want to change.



5. Enter the Account Delegate's name in the **Description** and reason for the change in the **Explanation**.

6. 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**.



Quick Reference Guide: Creating an Account Delegate

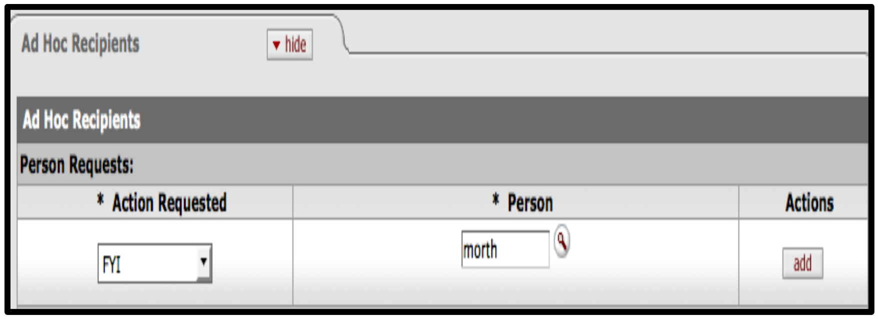
7. Click **Show** on the **Ad Hoc Recipients** tab.

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.



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