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Account Global

The Account Global (GACC) document is used to assign identical attributes to multiple existing accounts on a single document. The User assigns identical attributes to multiple accounts such as Account Responsibility and Expiration Dates. Assigning Account Responsibility includes assigning the Fiscal Officer (FA/FO), the Account Supervisor (AS) and the Account Manager (AM). The GACC document is subject to the same business rules as the Account document. In addition, at least one account must be selected on the Edit List of Accounts tab.

Account Global Workflow

The GACC eDoc may be initiated by any Kuali Financial System (KFS) user, but the document will route to the Campus Chart Manager and then the University Chart Manager for approval. Note: Unlike the Account document, this document does not route to the Fiscal Officer. The following diagram illustrates the general workflow of the GACC document, including applicable KFS roles in the routing cycle and processing requirements of each.
Creating an Account Global

To create a GACC eDoc, go to the Main Menu, Lookup and Maintenance, Chart of Accounts and select Account Global.

![GACC eDoc Layout](image-url)

The GACC eDoc contains the standard document header, 6 tabs, and 4 action buttons.

![Account Global eDoc](image-url)

For more information about the standard document header, tabs, and workflow action buttons, please refer to the the [Standard KFS eDoc Layout User Guide](#).
Global Account Maintenance Tab

The Global Account Maintenance tab contains only the fields that can be modified from this document. GACC does not contain all attributes and if you need to update an attribute that is not listed, you will need to use the Account maintenance document. There are no required fields, only the fields that are to be updated on the selected accounts need to be entered. If an account attribute does not need to be updated, leave that field blank. Field values may be entered directly or the respective lookups and/or dropdowns may be used to return a value.

Note: When editing or creating this eDoc, it is important to remember that the Account Supervisor cannot be the same person as the FA/FO or Account Manager.

Edit List of Accounts Tab

On the Edit List of Accounts tab, there are two ways to populate the accounts that you want to update globally. One is by manually entering or selecting one Account Number at a time from the Account Number lookup, the other is by selecting multiple accounts using the Look Up / Add Multiple Account Lines lookup.
Adding One Account at a Time

To add accounts one at a time, complete the Chart Code and Account Number fields then click the “add” button.

To complete these fields you can either enter the Chart Code and Account Number information directly or use the lookup beside each of the fields to search for and select the correct Chart Code and / or Account Number. Be sure to click the “add” button after you have completed these two fields.

Repeat the process to add more accounts.

Accounts that have been added can also be deleted by clicking on the delete button.

See example of “delete” button below.

Adding Multiple Accounts

You can add multiple accounts all at once by selecting them in bulk using the Look Up / Add Multiple Account Lines option.

Click the magnifying glass icon beside Lookup/Add Multiple Account Lines.
Enter all applicable or desired search parameters (criteria) on the Account Lookup screen and click the “search” button.

The accounts that meet the search criteria will be displayed.

After the results are returned, select check boxes to choose the accounts to be changed or updated by clicking the checkbox in the “Select?” column.

When selecting the accounts, the options are:
- “select from all pages” which will select all the accounts returned in the search,
- “deselect all from all pages” will clear any selected or checked accounts,
- “select all from this page” will select the accounts listed in the page being viewed,
- “deselect all from this page” will clear any selected accounts from the page being viewed.

Once all of the accounts you want to update have been selected, click the “return selected” button.
All of the accounts selected will display on the Edit List of Accounts tab. If any were selected in error, simply click the “delete” button for that account.

If more accounts are to be added you can add one at a time in the New Account section or use the Look Up / Add Multiple Account Lines option again.

Click “submit” button to route the GACC for Campus Chart Manager and University Chart Manager for approval.
Account Global Final Notes

While the GACC eDoc may be used to change attributes on multiple accounts, changes to the FA/FO or the AS will not affect eDocs that were already in process and routed for approval prior to the change. If an existing eDoc's routing needs to be updated, submit a KFS Trouble Ticket.

Submit a trouble ticket by either clicking Help Resources in the upper right hand corner of the KFS screen or go to https://www.hawaii.edu/kualifinancial/feedbackForm.php

Account Global Example

Update Account Supervisor

FA/FO 057, jkashiw (Kashiwaeda, Justin) needed to update the AS to pagotto (Pagotto, Louise), for 2 accounts. GACC eDoc number 4657858 was processed to update the 2 accounts.

Since the Account Supervisor is the only field that needed to be updated, the Account Supervisor Principal Name was populated with the new person (pagotto).
Route Log tab

- **ID:** 4657858 - KFS generated GACC document number.
  - **Route Status:** FINAL - eDoc is fully approved, no pending approval or acknowledgement requests. 
    - **Finalized:** 06:22 AM 06/18/2019 - Time and Date eDoc reached FINAL status.

- **Actions Taken**
  - **COMPLETED:** Taken By Kashiwaeda, Justin, Time/Date 12:55 PM 06/17/2019 - Time and Date Initiator submitted the GACC.
  - **APPROVED:** Taken By Tsuhako, Lisa (CC Chart Manager), Time/Date 05:14 PM 06/17/2019; By Lui, Patricia (University Chart Manager), Time/Date 06:22 AM 06/18/2019 - Time and Date Chart Managers approved the GACC.

For more information about the standard document header, tabs, and workflow action buttons, please refer to the the [Standard KFS eDoc Layout User Guide](#).