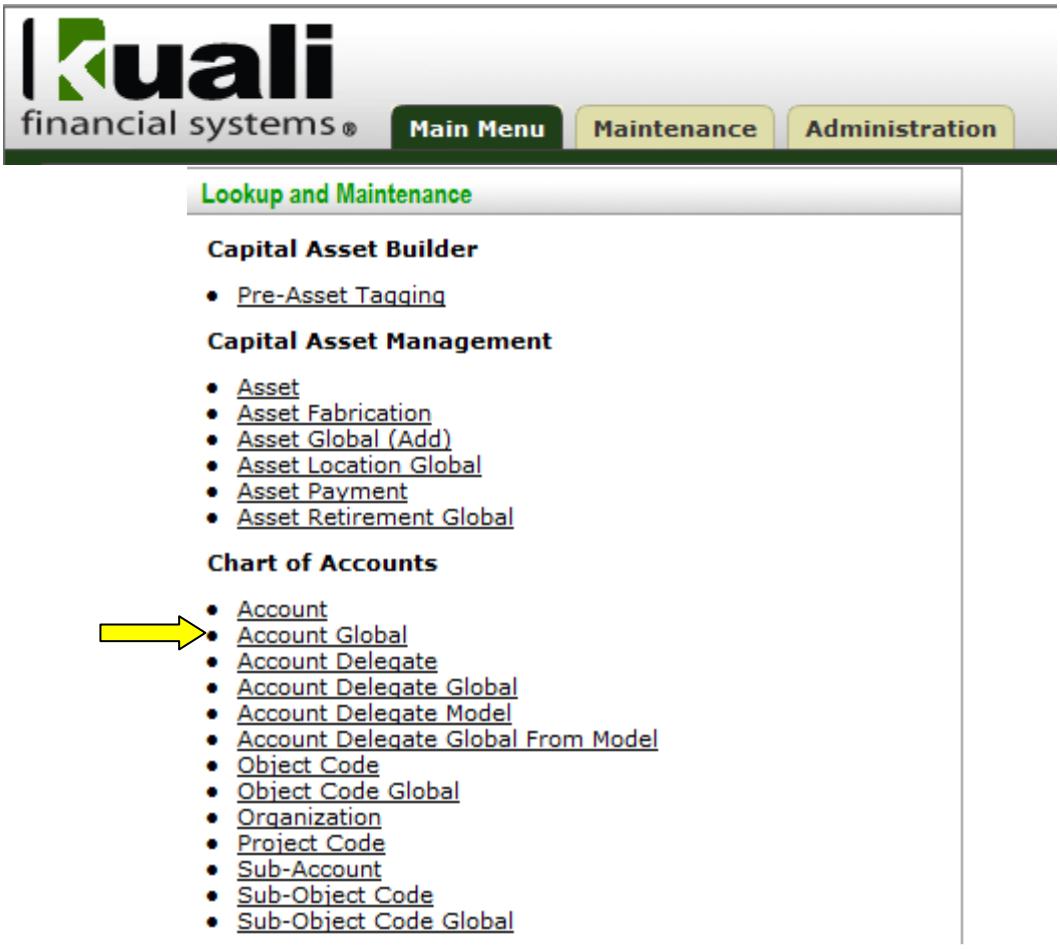
Kuali Financial System (KFS)
Account Global Function

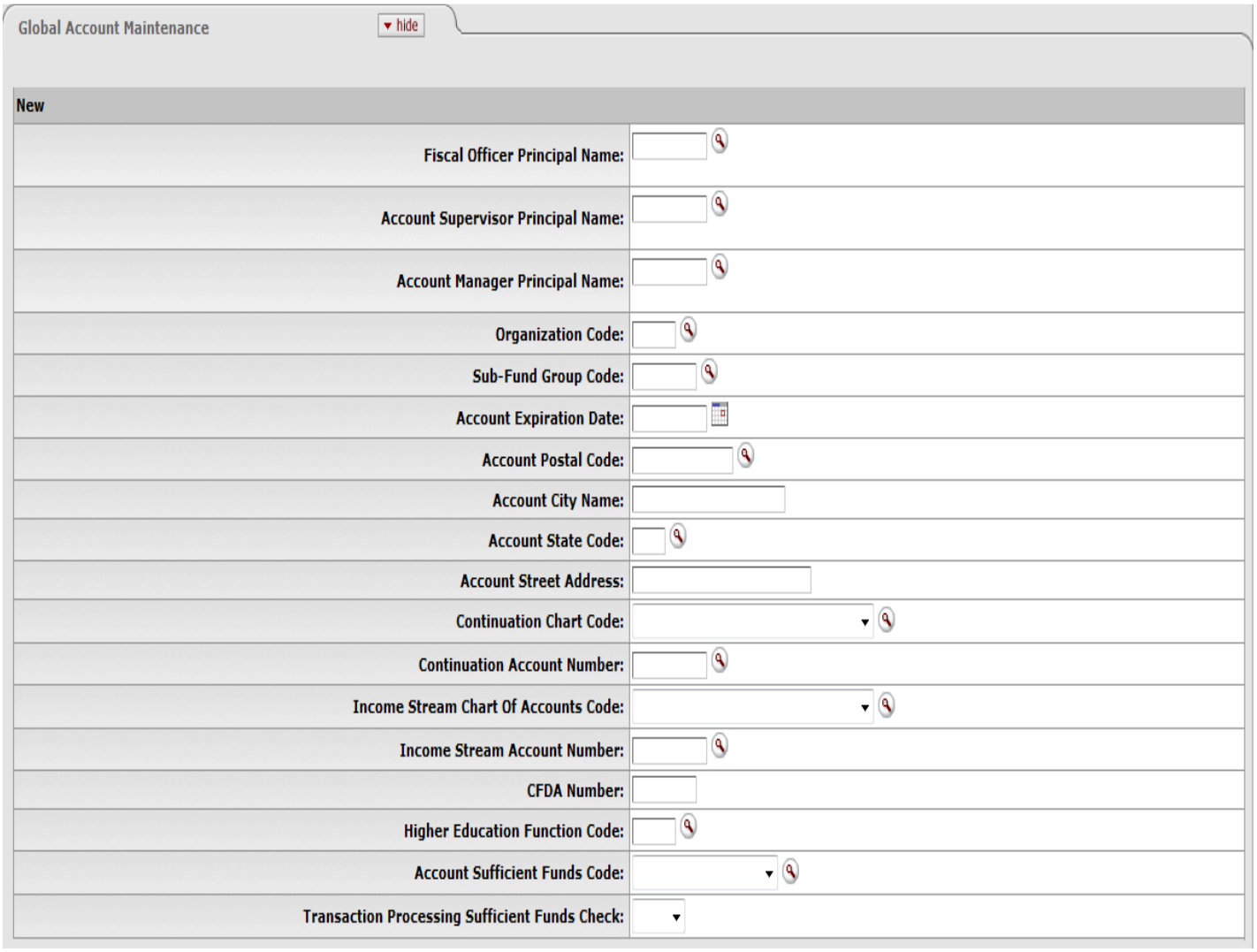
The account global document function is used to assign identical attributes

to <u>multiple</u> accounts on a <u>single</u> document.

Account Global function located: Kuali Main Menu – Lookup and Maintenance – Chart of Accounts

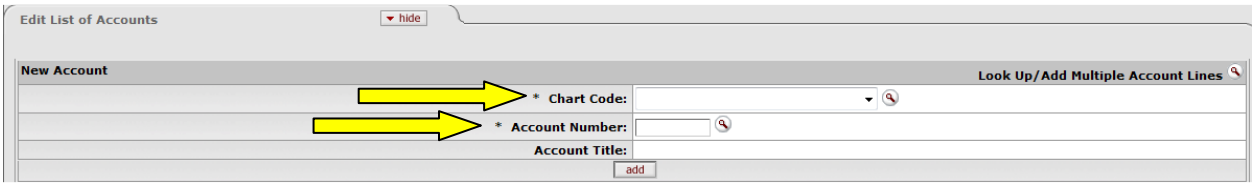


<u>Global Account Maintenance tab</u> - works the same as the **Edit Account** tab of the **Account document** except that it contains only the fields that can be modified from this tab. There are no required fields in this tab. Instead, you only need to **complete** the fields that you want to update on the selected accounts. If an account attribute is to remain as is, leave that field blank.

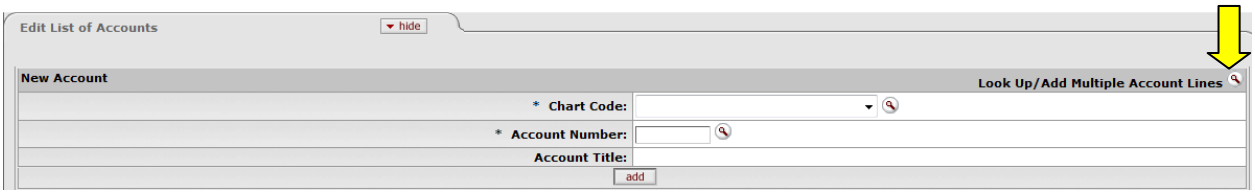


<u>Edit List of Accounts tab</u> - There are two ways to populate the accounts that you want to update globally.

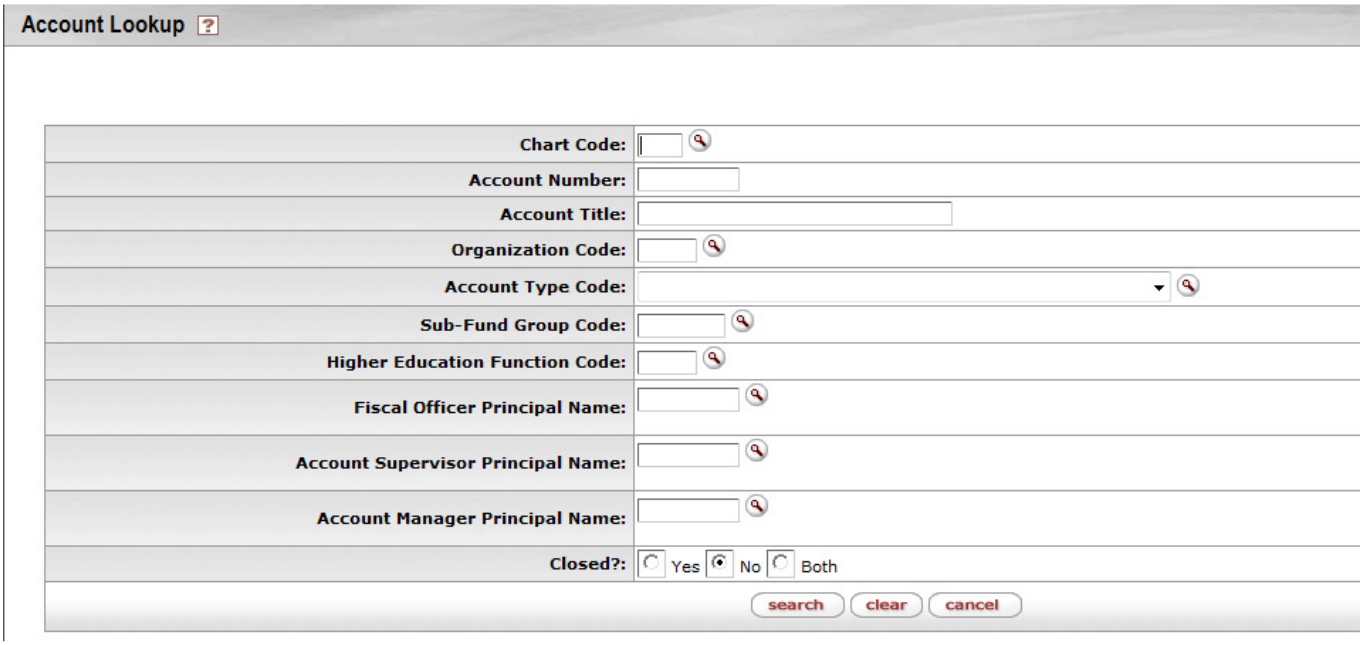
1) Manually enter or select one account at a time and choosing add



2) Use the special multiple value lookup called the **Look Up / Add Multiple Account Lines** to return multiple values. (Click on the looking glass icon to the right to open up the lookup screen)

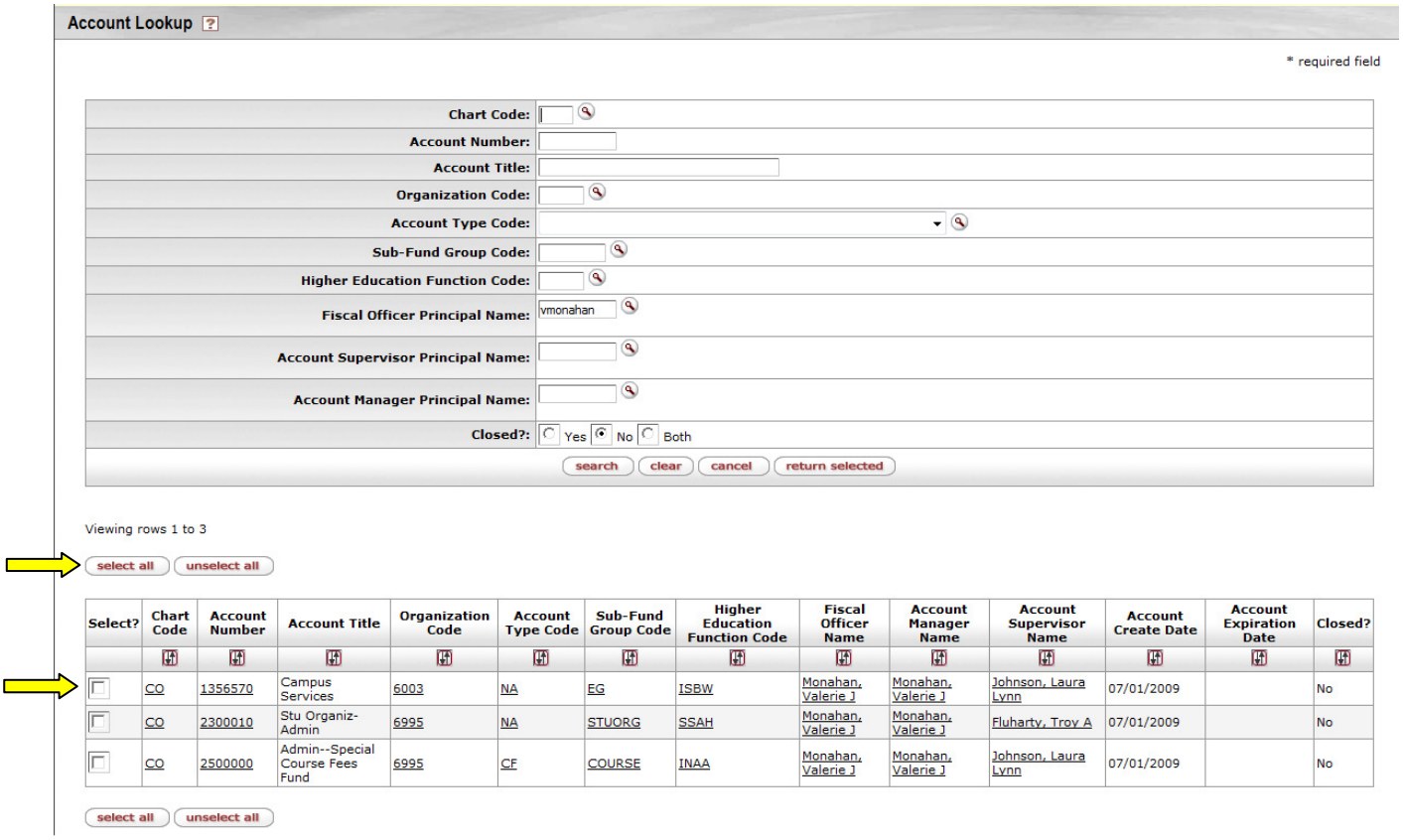


3) This will take you to the Account Lookup screen:

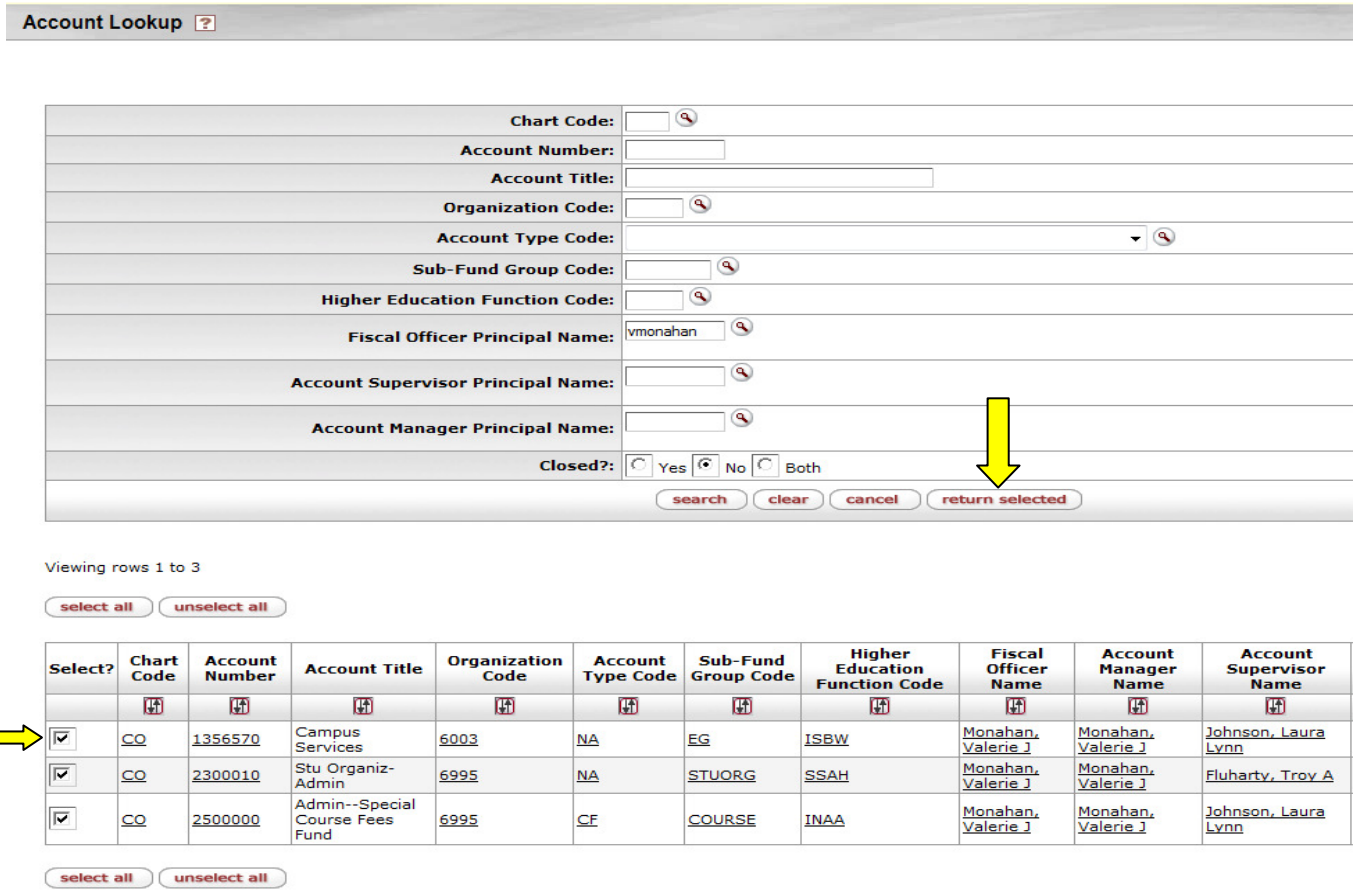


4) You can choose to look up by Organization Code or even by Fiscal Officer, Account Supervisor, or Account Manager Name.

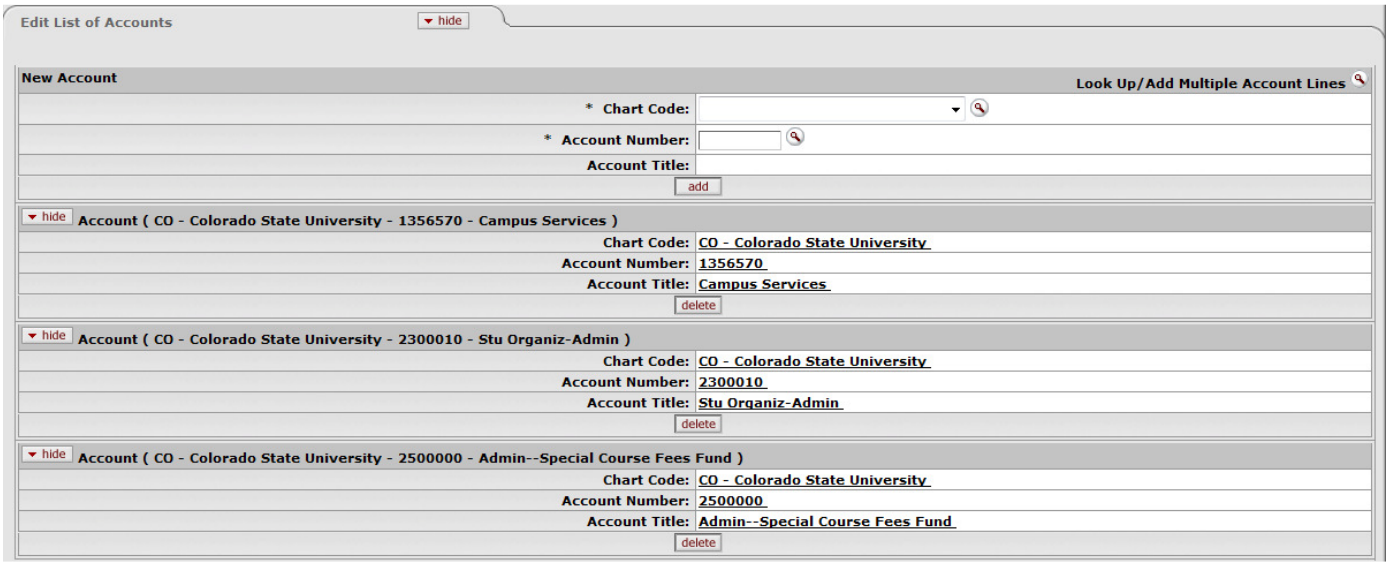
5) Enter the appropriate lookup criteria and click search. In this example below, we used vmonahan for the search and was returned 3 (three) accounts with vmonahan as the Fiscal Officer.
6) You can choose to select all accounts by clicking the 'select all' button at the top or bottom of the returned search or you can select just a few by clicking on the check box to the left of the screen.

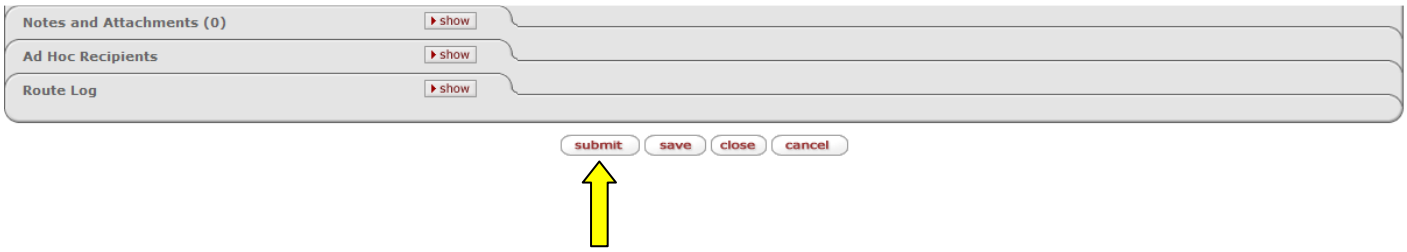


7) Once you have selected your accounts, click on the 'return selected' button.



8) This will automatically fill in the 'Edit List of Accounts' tab.



9) You can still enter other accounts, or do the lookup if you have more accounts to add.

10) Attach notes or backup if needed.
11) Once you have the account information changed, click submit and that will change all the accounts listed versus having to do one account at a time.