Account Global

Account Global is used to assign identical attributes to multiple accounts at one time. The Account Global is most often used for updating account responsibility roles (i.e. fiscal officers, account managers, or account supervisors), organization codes, or account expiration dates for multiple accounts.

The Account Global cannot be used to close accounts. To close an account, use the “Account” option under Chart of Accounts. Each account needs to be closed individually. To update Sponsored accounts (53xxxxx) you cannot use the Account Global document, you will need to go through Sponsored Programs to have the information updated.

Below we will go through the three most common uses of the Account Global document which are changing account responsibility roles (i.e. fiscal officer, account manager, or account supervisor), changing of an organization code, and creating an account expiration date for multiple accounts.

Changing the Account Responsibility on Multiple Accounts:

Account Global may be used when a fiscal officer, account manager, or account supervisor changes on multiple accounts. The Account Global document is located in Chart of Accounts Activities:

Document Overview:

Always provide a short description and a detailed explanation of why the change is taking place. The description will state what you are doing and the explanation states why you are doing it.
Global Account Maintenance:

Only fill in the information that needs to be updated for the accounts selected. Any information added in this section will update for all accounts you select in the “Edit List of Accounts” section.

Edit List of Accounts section:

Add all the accounts that have identical account attributes that need to be changed. To add multiple accounts at one time use “Look Up/Add Multiple Account Lines”.

NEW ACCOUNT

Look Up/Add Multiple Account Lines

* Chart Code: 

* Account Number: 

Account Title:

ADD
By using the “Look Up/Add Multiple Account Lines” option the screen below is displayed. Enter your lookup criteria by using the fields available and the click “Search”. Below we are looking at all accounts the original person is the Fiscal Officer on.

<table>
<thead>
<tr>
<th>Account Lookup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chart Code: CO</td>
</tr>
<tr>
<td>Account Title:</td>
</tr>
<tr>
<td>Responsibility Center Code:</td>
</tr>
<tr>
<td>Reports To Chart Of Accounts Code:</td>
</tr>
<tr>
<td>Fund Group Code:</td>
</tr>
<tr>
<td>Higher Education Function Code:</td>
</tr>
<tr>
<td>Account Supervisor Principal Name:</td>
</tr>
<tr>
<td>Closed?:</td>
</tr>
</tbody>
</table>

The search results below were populated. Select accounts by individually checking the account number or choosing “Select All” and click “Return Selected”. In the example below, 14 accounts were selected and returned in.

The search results below were populated. Select accounts by individually checking the account number or choosing “Select All” and click “Return Selected”. In the example below, 14 accounts were selected and returned in.

<table>
<thead>
<tr>
<th>Select All From All Pages</th>
<th>Disselct All From All Pages</th>
<th>Select All From This Page</th>
<th>Disselct All From This Page</th>
<th>Return Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ CO 2001373</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐ CO 2900441</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Accounts are now populated in the account global document. You can still add any needed accounts by following the steps above. To delete an account that you selected click the “Delete” button below the account.
Attach any needed support in the “Notes and Attachments” section. You can also “Ad Hoc” any recipients that are not listed through the normal routing process. Click “Submit” and Fiscal Officer changes will occur when the routing process is complete and the document is “Final”.

### Changing an Organization Code for Multiple Accounts:

Account Global may be used when an Organization Code needs to be changed for multiple accounts. Access the Account Global document in the Chart of Accounts Activities section.

### Document Overview:

Always provide a short description and a detailed explanation of why the change is taking place.
Global Account Maintenance:

Only fill in the information that needs to be updated for the accounts selected.

Edit List of Accounts:

Add all the accounts that have identical account attributes that need to be changed. To add multiple accounts at one time use “Look Up/Add Multiple Account Lines” as described earlier. You can still add any needed accounts by following the steps described earlier. To delete an account that you selected click the “delete” button below the account.

Attach any needed support in the “Notes and Attachments” section and “Ad Hoc” any recipients that are not listed through the normal routing process. Click “Submit” and the Organization Code changes will occur when the routing process is complete and the document is “Final”.

Creating an Account Expiration Date for Multiple Accounts:

Account Global may be used when an account expiration date needs to be put in for multiple accounts. Access the Account Global document in the Chart of Accounts Activities section.

Document Overview:

Always provide a short description and a detailed explanation of why the change is taking place.

Global Account Maintenance:

Only fill in the information that needs to be updated for the accounts selected. In the below example, fiscal officer and account expiration date are updating.
Edit List of Accounts:

Add all the accounts that have identical account attributes that need to be changed. To add multiple account lines, use “Look Up/Add Multiple Account Lines” as described earlier in the document.

In this example we have added the accounts individually to the document by typing them into the “account number” box below and clicking “add”.

Attach any needed support in the “Notes and Attachments” section. You can also “ad hoc” any recipients that are not listed through the normal routing process. Click “submit” and expiration dates will show when the routing process completes and the document is finalized.
If you have any questions regarding this process, please contact your Campus Services Representative. The list can be found at http://busfin.colostate.edu/Depts/Campus_Svcs.aspx.