



## **Assigning All Projects/Activities to an Alternate**



Welcome to our step-by-step guide to the Designating Alternates portion of GFA.

This is a walk-through of the process, created to make your job easier.

If you have any questions after reading this guide, [please contact us](#).

## The links to the GFA Application on the front page of CIS.

Financial & Business Services

**REPORTS**

- Effort Distribution Report (EDR)
- Endowment Market Report
- Financial Information Library
- Management Reports
  - Evidence of Review (EOR)
  - PDF Bundle
- PI Budget Planning Tool

**TRANSACTION DETAIL SEARCH**

- Journals
- Purchase Orders
- UPAY Credit Card Detail
  - WFG Credit Card Detail
- Vendor Search
- Vouchers

**FORMS**

- Alphabetical List
- Departmental List

**PROCESSING**

- Chartfield Templates
- Departmental Deposits
- Journal Entry
- Granting Financial Authority**
- Account Executive Approval**
- Capture Signature**
- Verify Authorities**
- UPB Billing Page
- Purchasing Card Reallocation
- Sales Tax Reporting
- Travel
- Web FTP Application
- Web Journal Processing

**RESOURCES & INFORMATION**

- Accounting Calendar
- Chartfields
  - Quick Chartfield Validate
- Valid Account Ranges for Financial Documents
  - Campus Order Account Ranges

**FBS**  
Report Issues with FBS Web Applications



The main GFA page has many links on the navigation bar, located at the top.

The screenshot shows the top of the GFA website. A red banner at the top contains the University of Utah logo and the text "GRANTING FINANCIAL AUTHORITY THE UNIVERSITY OF UTAH". Below this is a dark navigation bar with links: Home, Capture Signature, Designate Alternate(s) (with a dropdown arrow), and Verify Authorities (with a dropdown arrow). The main content area features a large GFA logo on the left and a welcome message on the right. The welcome message says "Welcome to Granting Financial Authority" and "You can use this application to:" followed by a list of three bullet points: "Capture an image of your signature (Requisitions, Payment Requests, Travel Requests)", "Designate others to approve financial transactions", and "Verify who can approve financial transactions".

Select *Designate Alternates*, and then *One Alternate to Many Accounts*.

This screenshot shows the same GFA website header as above, but with the "Designate Alternate(s)" dropdown menu open. The dropdown menu is dark grey and contains three options, each with an icon and a red arrow pointing to the right. The first option is "One Account to Many Alternates" with a document icon and three people icons. The second option is "One Alternate to Many Accounts" with a person icon and a document icon; a white mouse cursor is hovering over this option, and a circled number "2" is next to it. The third option is "Account Executive Approvals" with a person icon and a red stamp icon. A circled number "1" is next to the "Designate Alternate(s)" dropdown arrow in the navigation bar.



Type the Alternate's last name, comma, then their first name - *with no spaces*. A list of names will appear. Select the desired Alternate.

**GRANTING FINANCIAL AUTHORITY**  
THE UNIVERSITY OF UTAH

Home Capture Signature Designate Alternate(s) Verify Authorities Help

SC

One Alternate to Many Acc

Add this person:

Account Alternate Name/EmpID \* patten, Update

PATTEN,SCOTT~00996518  
PATTEN,RICHARD MCCURRY~00342526  
PATTEN,DOUGLAS L~00106074

Search by Org/Activity/Project Search by Account Executive or Alternate

Select the *Search By Account Executive or Alternate* tab.

Add this person:

Account Alternate Name/EmpID \* PATTEN,SCOTT~00996518 Update

TO

Search by Org/Activity/Project Search by Account Executive or Alternate

BU  01  02  04

Org Type Org ID or Description



Type the Account Executive's last name, comma, then their first name - *with no spaces*.

The screenshot shows a search interface with a header "TO". Below the header are two tabs: "Search by Org/Activity/Project" and "Search by Account Executive or Alternate". The "Search by Account Executive or Alternate" tab is active. There are two input fields: "Account Executive" and "Other Account Alternate". The "Account Executive" field contains the text "howat,laura" and has a dropdown menu open below it. The dropdown menu shows a single option: "HOWAT,LAURA M-00100629". Two red arrows point to the input field and the dropdown option. Below the input fields are two buttons: "Search" and "Clear All".

After you have selected the desired Account Executive, click *Search*.

The screenshot shows the same search interface as the previous one. The "Account Executive" field now contains the selected value "HOWAT,LAURA M-00100629". The "Other Account Alternate" field is empty and contains the placeholder text "Type Emplid or Name". The "Search" button is highlighted with a blue background and a mouse cursor is pointing at it. A red arrow points to the "Search" button.



# A list of Projects and Activities will appear.

SCOTT PATTEN [Log Out](#)

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**One Alternate to Many Accounts**

### Add PATTEN,SCOTT~00996518 to an Org/Activity/Project

<input checked="" type="checkbox"/> <b>Select All</b>	OrgID	Funding Source	Description	Account Executive	Fund	Type	Date From	Date To	Status
<input type="checkbox"/>	00346	01-01534	FOURTH FLOOR XEROX	HOWAT,LAURA M 00100629	2000	All Financial Transaction:	10/01/2014	11/30/2015	
<input type="checkbox"/>	01110	01-01769	TAX SERVICES OFFICE DEV.	HOWAT,LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	00346	01-05806	CONTROLLER	HOWAT,LAURA M	1001	All Financial Transactions			

**Click *Select All*, and choose the *From* and *To* dates.**

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**One Alternate to Many Accounts**

### Add PATTEN,SCOTT~00996518 to an Org/Activity/Project

<input checked="" type="checkbox"/> <b>Select All</b>	OrgID	Funding Source	Description	Account Executive	Fund	Type	Date From	Date To	Status
<input type="checkbox"/>	00346	01-01534	FOURTH FLOOR XEROX	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10/01/2014	11/30/2015	
<input type="checkbox"/>	01110	01-01769	TAX SERVICES OFFICE DEV.	HOWAT,LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	00346	01-05806	CONTROLLER MGT	HOWAT,LAURA M 00100629	1001	All Financial Transactions			
<input type="checkbox"/>	00346	01-05824	CASH OVER & SHORT	HOWAT,LAURA M 00100629	1001	All Financial Transactions			

**1** (points to Select All button)

**2** (points to Date From field)

Calendar for October 2014 is displayed, with the 1st highlighted.



Clicking the Fill Down buttons will add the dates to every line.

SCOTT PATTEN Log Out

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→ One Alternate to Many Accounts

### Add PATTEN,SCOTT~00996518 to an Org/Activity/Project

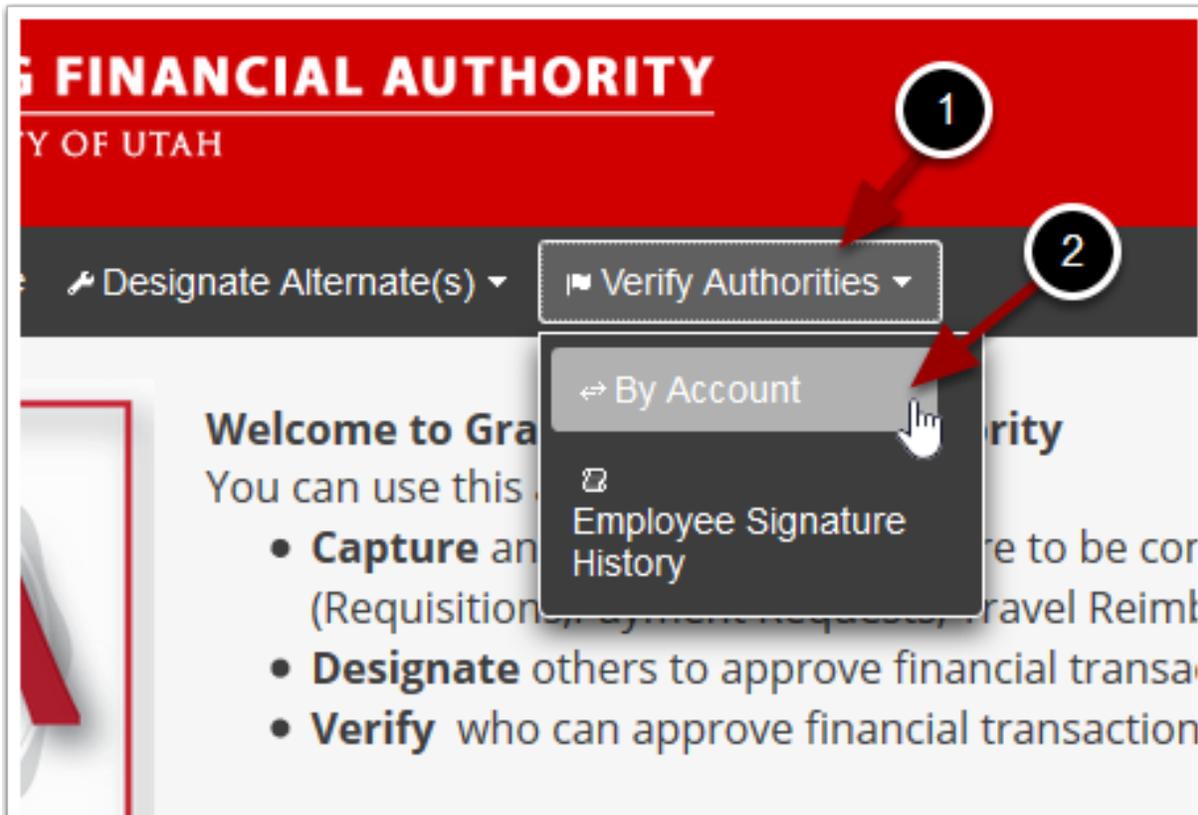
<input type="checkbox"/> Un-Select All	OrgID	Funding Source	Description	Account Executive	Fund	Type <input type="button" value="+ Fill Down"/>	Date From <input type="button" value="Remove -Date From"/>	Date To <input type="button" value="Remove -Date To"/>	Status
<input checked="" type="checkbox"/>	00346	01-01534	FOURTH FLOOR XEROX	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10/01/2014	11/30/2015	
<input checked="" type="checkbox"/>	01110	01-01769	TAX SERVICES OFFICE DEV.	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10/01/2014	11/30/2015	
<input checked="" type="checkbox"/>	00346	01-05806	CONTROLLER MGT	HOWAT,LAURA M 00100629	1001	All Financial Transactions	10/01/2014	11/30/2015	
<input checked="" type="checkbox"/>	00346	01-05824	CASH OVER & SHORT	HOWAT,LAURA M 00100629	1001	All Financial Transactions	10/01/2014	11/30/2015	

Once you have the desired dates, Click *Submit*.

CASH OVER SHORT	HOWAT,LAURA M 00100629	1001	All Financial Transactions	10
CLAIMED PROPERTY RECOVERY	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10
COUNTS RECEIVABLE-EXPENSE RECOVERY	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10



You can check Alternates by selecting *Verify Authorities* and then *By Account*.



Enter an Activity or Project to see the list of authorized signers.

### Verify Authorities-By Account

BU  01  02  04

Org

Activity

Project

Transaction Date

Date From \*

Date To \*