



HowTo: Assigning All Projects/Activities to an Alternate

Welcome to our HowTo guide for 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](#).

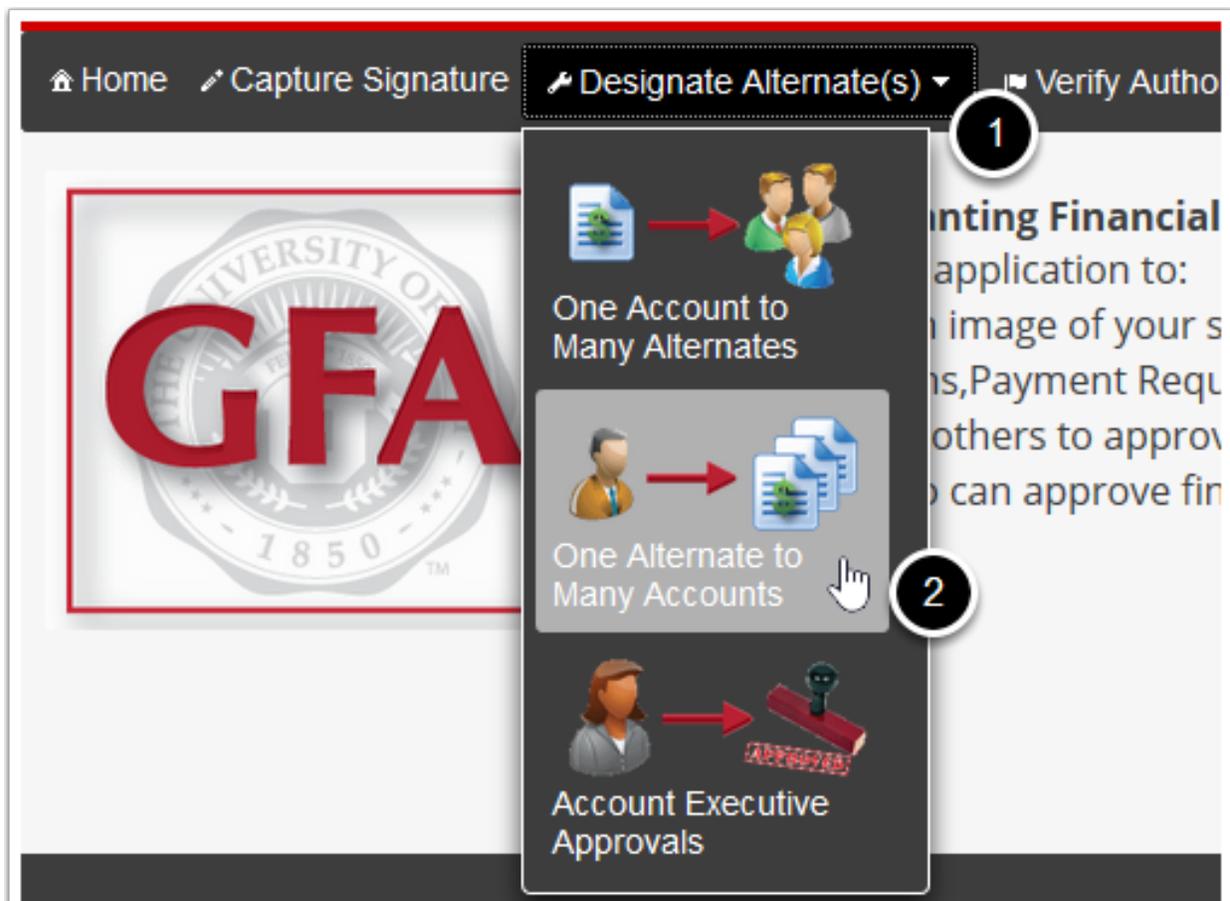
The links to the GFA Application on the front page of CIS.



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



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



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/EmplID * patten, Update

PATTEN,SCOTT~00996518
PATTEN,RICHARD MCCURRY~00342626
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/EmplID * PATTEN,SCOTT~00996518 Update

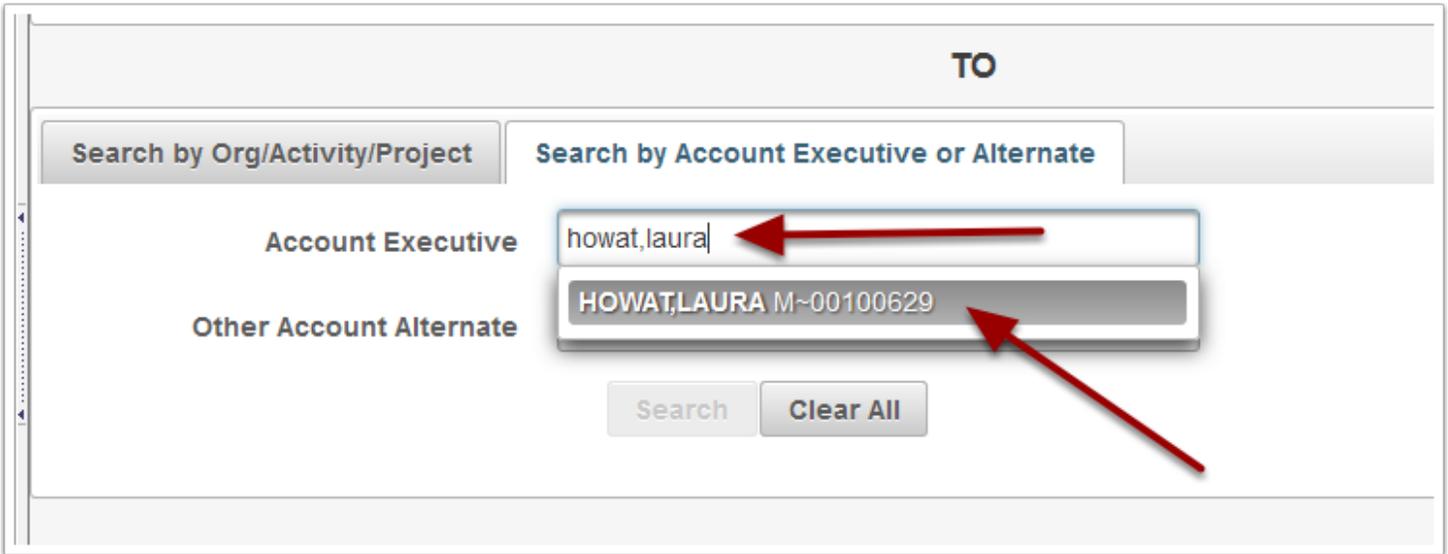
TO

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

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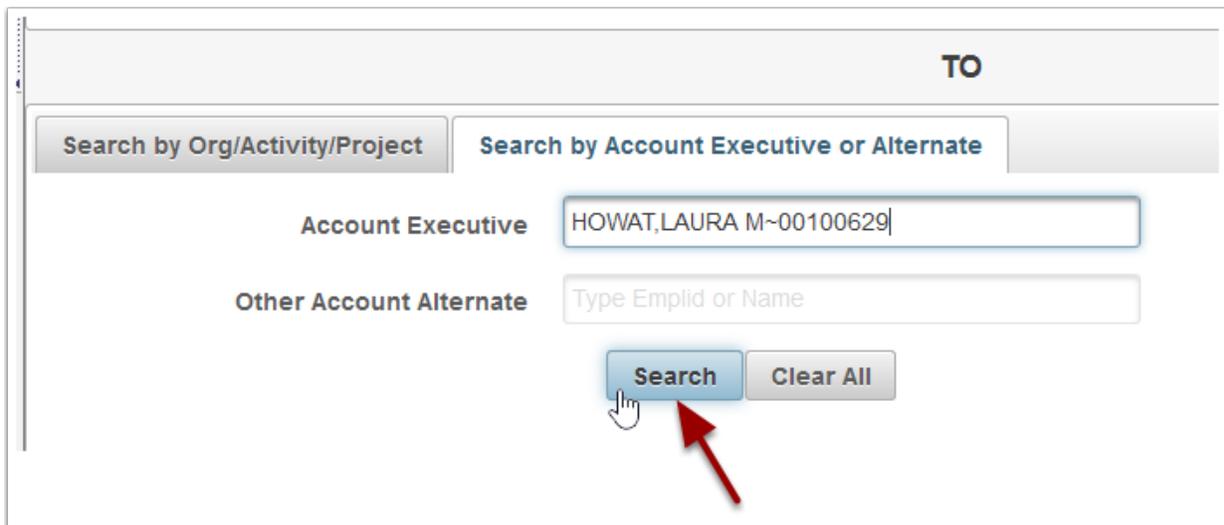
Org Type Org ID or Description

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". A dropdown menu is open below this field, showing a single item: "HOWAT,LAURA M-00100629". Two red arrows point to the input field and the dropdown item. 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 item: "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 border and a mouse cursor, and a red arrow points to it. The "Clear All" button is also visible.

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"/> Select All	OrgID	Funding Source	Description	Account Executive	Fund	Type	Date From	Date To	Status
						+ Fill Down All Financial Transaction	Fill Down 10/01/2014	Fill Down 11/30/2015	
<input type="checkbox"/>	00346	01-01534	FOURTH FLOOR XEROX	HOWAT, LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	01110	01-01769	TAX SERVICES OFFICE DLV.	HOWAT, LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	00346	01-05006	CONTROLLER	HOWAT, LAURA M	1001	All Financial Transactions			

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

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"/> Select All	OrgID	Funding Source	Description	Account Executive	Fund	Type	Date From	Date To	Status
						+ Fill Down All Financial Transaction	Fill Down 10/01/2014	Fill Down 11/30/2015	
<input type="checkbox"/>	00346	01-01534	FOURTH FLOOR XEROX	HOWAT, LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	01110	01-01769	TAX SERVICES OFFICE DLV.	HOWAT, LAURA M 00100629	2000	All Financial Transactions			
<input type="checkbox"/>	00346	01-05006	CONTROLLER MGT	HOWAT, LAURA M 00100629	1001	All Financial Transactions			
<input type="checkbox"/>	00346	01-05024	CASH OVLK & SHORL	HOWAT, LAURA M 00100629	1001	All Financial Transactions			

1
→

2
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Oct
2014

Sa	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

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

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One Alternate to Many Accounts

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

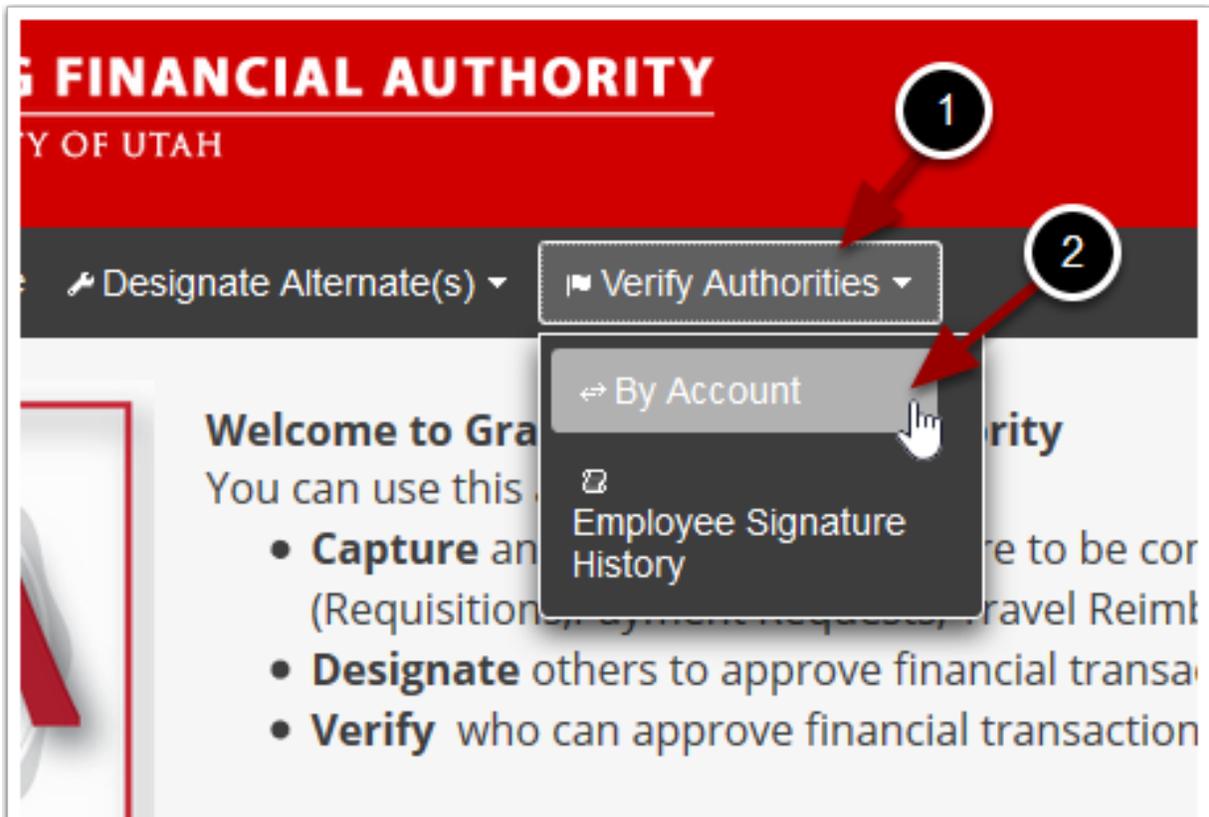
Un-Salced All	OrgID	Funding Source	Description	Account Executive	Fund	Type + Fill Down All Financial Transactions	Date From Remove -Date From 10/01/2014	Date To Remove -Date To 11/30/2015	Status
<input checked="" type="checkbox"/>	00348	01-01584	FOURTH FLOOR XEROX	HOWAT,LAURA M 00100629	2000	All Financial 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"/>	00348	01-05808	CONTROLLER MGT	HOWAT,LAURA M 00100629	1001	All Financial Transactions	10/01/2014	11/30/2015	
<input checked="" type="checkbox"/>	00346	01-06824	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
ACCOUNTS PAYABLE-EXPENSE RECOVERY	HOWAT,LAURA M 00100629	2000	All Financial Transactions	10

Select Range
Submit


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 *

