Maintaining Organization Codes

The Organization document defines the entities representing units at many different levels within the institution, e.g., a department, school, college, campus. The document collects important identifying information about an Organization and defines its place in the organization hierarchy. Organization is an important part of the Chart of Accounts and the organization hierarchy is frequently leveraged by the KFS for use in Workflow and reporting.

The KFS Organization Code is used to associate users, accounts, assets, and documents to a department, school/college or campus. The Organization Code is also used to restrict user roles in Purchasing/Accounts Payable, Capital Assets, Accounts Receivable, and Labor Distribution. The University of Hawaii (UH) also uses some of the attributes on the organization table to define the Purchase Order (PO) Billing Address, route security reports, and termination emails.

Maintenance of the Organization Code may be initiated by any KFS user, but the document will route to the campus and University chart managers for approval. New Organization codes should be coordinated with the campus chart manager.

To search for or maintain an Organization Code, go to Main Menu -> Lookup and Maintenance -> Chart of Accounts -> Organization.
**Organization Maintenance Workflow**

**Business Rules**

1. The Organization Code must be unique within the Chart Code.

**Creating an Organization Code**

If the organization is not found in the system after searching in the Organization Lookup, a new organization code may be created. Request a new organization code by opening the Organization Maintenance eDoc located in the Main Menu -> Lookup and Maintenance -> Chart of Accounts -> Organization and then click on the create new button at the top right of the screen.
The Organization eDoc screen is explained below.

As in all KFS eDocs, only the tabs that have required information are initially opened upon selecting create. To request a new organization, use the following steps.

For more information about the standard document header, tabs and workflow action buttons, please refer to the Standard KFS eDoc Layout User Guide.
The Organization tab captures all the detail attributes of the organization. Complete the required information.

1. **Chart Code – (Required)** This is the 2-character chart code that the organization belongs to. You may enter in the code or search for it from the Chart lookup.
2. **Organization Code – (Required)** This is the code to identify the organization. It is unique within the chart to which it belongs to. The code may be up to four characters.
3. **Organization Name – (Required)** This is the long descriptive name of the organization. This field is 40 spaces.
4. **Organization Manager UserID** – (Display only) This is the UH number of the Organization Manager. The system will display the UH number associated with the principal name that is entered in the Organization Manager Principal Name.
5. **Organization Manager Principal Name – (Required)** This is the UH username of the Organization Manager. You may enter in the UH username or search for it from the Person lookup. The Organization Manager is the recipient of the emails regarding terminated employees.
6. **Organization Manager Name** – (Display only) This is the name (lastname, firstname) of the Organization Manager. The system will display the name associated with the principal name that is entered in the Organization Manager Principal Name.
7. **Responsibility Center Code - (Required)** This is the 2-character responsibility center code that the organization belongs to. You may enter in the code or search for it from the Responsibility Center lookup. In most cases, it represents the 2-digit FO code. For 3-digit FO codes, alphanumeric codes have been assigned. The Responsibility Center Code is used to crosswalk a user’s default organization to an FO code for KFS Security Report distribution in PageCenterX.
8. **Organization Physical Campus Code – (Required)** This is the 2-character campus code which represents the physical location of the organization. You may enter in the code or search for it from the Campus lookup.

9. **Organization Type Code – (Required)** This is the 1-character organization type code that identifies the type of the organization. You may select it from the drop down menu or search for it from the Organization Type lookup. Examples include Center, Department, Executive Level, School.

10. **Organization Default Account Number – (Required)** This is the primary account used for any account reference for an organization. You may enter in the account number or search for it from the Account lookup. UH is not using this field.

11. **Billing Name 1 – (Required)** This is the first line of the organization’s billing name. The Billing Name prints on the Purchase Order in the Billing Address section. This field is 40 spaces.

12. **Billing Name 2 – (Optional)** This is the second line of the organization’s billing name. The Billing Name prints on the Purchase Order in the Billing Address section. This field is 40 spaces.

13. **Organization Address Line 1 – (Required)** This is the first line of the organization’s billing street address. The Organization Address prints on the Purchase Order in the Billing Address section. This field is 30 spaces.

14. **Organization Address Line 2 – (Optional)** This is the second line of the organization’s billing street address. The Organization Address prints on the Purchase Order in the Billing Address section. This field is 30 spaces.

15. **Organization City Name – (Display only)** This is the city associated with the postal code entered in the Organization Postal Code. The Organization City Name prints on the Purchase Order in the Billing Address section.

16. **Organization State/Province Code – (Display only)** This is the state code associated with the postal code entered in the Organization Postal Code. The Organization State Code prints on the Purchase Order in the Billing Address section.

17. **Organization Postal Code – (Required)** This is the postal code for the organization’s billing address. The Organization Postal Code prints on the Purchase Order in the Billing Address section. You may enter in the code or search for it from the Postal Code lookup.

18. **Organization Country Code – (Required)** This is the country code for the organization’s billing address. You may select the country from the drop down menu or search for it from the Country lookup.

19. **Organization Begin Date – (Required)** This is the date that the organization began its operations. For new organizations, the default is the current date. You may enter in the date (MM/DD/YYYY) or select a date from the calendar lookup. KFS will not allow dates prior to the current date.

20. **Organization End Date – (Optional)** This is the date that the organization was dissolved. You may enter in the date (MM/DD/YYYY) or select a date from the calendar lookup.

21. **Reports To Chart Code – (Required)** This is the 2-character chart code that the organization reports to in the hierarchy. You may enter in the code or search for it from the Chart lookup.

22. **Reports To Organization Code – (Required)** This is the organization code designating the organization within the hierarchy to which the organization reports. You may enter in the code or search for it from the Organization lookup.

23. **Active Indicator – (Optional)** This checkbox indicates if the organization is active. The default is checked (active).
plant accounts tab

the plant accounts tab is used to capture the plant accounts related to the organization. it can only be modified by the chart managers or the plant fund accountants (pfmo).

1. organization plant chart – (required) this is the 2-character chart code for the organization plant account. you may enter in the code or search for it from the chart lookup. uh uses the same chart code as the organization code.
2. plant account number – (required) this is the organization plant account used for the organization. you may enter in the account number or search for it from the account lookup. uh uses account number 9088000.
3. campus plant chart – (required) this is the 2-character chart code for the campus plant account for the organization. you may enter in the code or search for it from the chart lookup. uh uses the same organization plant chart for the campus plant chart.
4. campus plant account number – (required) this is the campus plant account used for the organization. you may enter in the account number or search for it from the account lookup. uh uses the same organization plant account number for the campus plant account number.

hrms unit tab

(uh is not using this tab.)

the hrms unit tab is used to capture human resources management system information.
Editing an Organization

If you need to modify the attributes of an organization, search for the organization using the Organization lookup and click on the edit link next to the organization code.

After clicking on the edit link, KFS will display a screen with the old (current) values on the left and the new (revised) values on the right. You may update any of the fields that have an input box.
The revised value fields will have an asterisk to indicate that a change was performed.
Copying an Organization

If you want to create a new organization by copying an existing organization, search for the organization using the Organization lookup and click on the copy link next to the organization code.

After clicking on the copy link, KFS will display a screen with the original values on the left and the new copy values on the right. Some of the fields are defaulted with the values from the original organization code to the new copy. You may change any of the fields as appropriate. KFS will check to make sure the organization code is unique within the chart code.
Searching for an Organization Code

The Organization Lookup screen enables you to search for existing organizations in the system. The search may be based on several criteria, both individually or simultaneously.

Organization Lookup Screen
You may search for existing organizations using the following criteria:

1. **Chart Code** - This is the 2-character chart code that the organization belongs to. You may enter in the code or search for it from the Chart lookup.
2. **Organization Code** - This is the code to identify the organization. It is unique within the chart to which it belongs.
3. **Organization Name** - This is the long descriptive name of the organization. Use the wild card (*) symbol before and/or after the name when searching by a partial name.
4. **Responsibility Center Code** - This is the 2-character responsibility center code that the organization belongs to. You may enter in the code or search for it from the Responsibility Center lookup. In most cases, it represents the 2-digit Fiscal Office (FO) code. For 3-digit FO codes, alphanumeric codes have been assigned.
5. **Organization Type Code** - This is the 1-character organization type code that identifies the type of the organization. You may select it from the drop down menu or search for it from the Organization Type lookup.
6. **Reports to Chart Code** - This is the 2-character chart code that the organization reports to in the hierarchy. You may enter in the code or search for it from the Chart lookup.
7. **Reports to Organization Code** - This is the organization code designating the organization within the hierarchy to which the organization reports to. You may enter in the code or search for it from the Organization lookup.
8. **Active Indicator** - You can use this field to limit your search to view only active organizations, only inactive organizations, or both active and inactive organizations.

After entering your search criteria, click on the search button to execute the search.

**Search Results**

Sample of searching for organizations belonging to chart code MA.

1. The screenshot below shows there are 686 organizations within the MA chart code in KFS.
2. However, only the first 500 can be displayed at one time.
3. You'll need to narrow your search with one or more criteria to find your particular organization.
To inquire on the details of an Organization, click on the Organization Code.

The Organization Inquiry screen will display the Organization Hierarchy which identifies the different reporting levels, i.e., reports to, for the Organization.

### Uses of the Organization Code within KFS

#### User Security and Access

The Organization Code is used in the Kuali Identity Management (KIM) module to assign a primary department which is used as a default for the user and to qualify certain roles for document security and access.
Sample of user’s primary department code:

```
<table>
<thead>
<tr>
<th>Employee Id</th>
<th>Primary</th>
<th>Employee Status</th>
<th>Employee Type</th>
<th>Primary Department Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>10267753</td>
<td>Yes</td>
<td>Active</td>
<td>Professional</td>
<td>SW-FISC</td>
</tr>
</tbody>
</table>
```

Sample of user’s roles with organization qualification:

```
<table>
<thead>
<tr>
<th>Role Qualifier</th>
<th>Namespace Code</th>
<th>Name</th>
<th>Chart Code</th>
<th>Organization Code</th>
<th>Active From Date</th>
<th>Active To Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Qualifier</td>
<td>MA - UI-MANNA</td>
<td>Name</td>
<td>Chart Code</td>
<td>Organization Code</td>
<td>Active From Date</td>
<td>Active To Date</td>
</tr>
</tbody>
</table>
```

The user’s primary department is used to map to an organization code. On the Organization code the Responsibility Center attribute maps to a fiscal office (FO) code which is used to group users for the KFS Security Report. The FO code is used to determine which PageCenterX mailbox (FOnnn) the report will be distributed to.
The user’s primary department is used to map to an organization code which is used to identify the person who receives the terminated user emails. The person identified as the Organization Manager Principal Name is the person who is sent the email.

Document Defaults

The user’s primary department code is used as the default chart code and organization code on the Requisition document.

The user’s primary department code is used to assign the campus processing location on the Disbursement Voucher.
The Organization Billing Name and Address is used on the printed Purchase Order (PO) based on the chart code and organization code for the PO.

Sample chart code and organization code on the PO:

![Sample chart code and organization code on the PO](image)

Sample billing address fields for MA-DNTR:

![Sample billing address fields for MA-DNTR](image)

Sample printed PO with billing address from MA-DNTR:

![Sample printed PO with billing address from MA-DNTR](image)
Identification of records

The Organization Code is on the account and is used to associate the account with a functional unit within the UH.

The Organization Code is on the asset and is used to associate the asset with a functional unit within the UH.