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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.

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.

**Buttons**

When searching for an Organization the following buttons will appear.

1. Click the Search button to return the results of your search.
2. Click the Clear button to remove prior search criteria.
3. Click the Cancel button to cancel the search and return to the Main Menu.

**Search Results**

1. Sample of searching for organizations belonging to chart code MA.
   a. The screenshot below shows there are 626 organizations within the MA chart code in KFS.
   b. However, only the first 500 can be displayed at one time.
   c. You'll need to narrow your search with one or more criteria to find your particular organization.

<table>
<thead>
<tr>
<th>Actions</th>
<th>Chart Code</th>
<th>Organization Code</th>
<th>Organization Name</th>
<th>Responsibility Center Code</th>
<th>Organization Type Code</th>
<th>Active Indicator</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>EMA</td>
<td>00</td>
<td>Office Of EMA</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>10</td>
<td>EMA</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>20</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>30</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>40</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>50</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>60</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>EMA</td>
<td>70</td>
<td>Academic Affairs</td>
<td>100</td>
<td>1</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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.

**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.

**eDoc Information Box**

1. Doc Nbr = eDoc Number
2. Initiator = UH username of person initiating eDoc
3. Status (Document Status)
   a. Initiated
   b. Saved
   c. Enroute
   d. Final
   e. Disapproved
   f. Cancelled
4. Created = Time and Date eDoc was initiated

**Document Overview Tab**

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.

**Document Overview**

The Document Overview is a standard KFS tab and is on all KFS eDocs. Complete the required information.
1. Description - (Required) - Enter a business related description. This field is 40 spaces. The Organization eDoc Description field is required using the following conventions. Uppercase or lowercase is accepted in this tab.
   b. Edit Org: FO #-EDIT Org code. Example: 017-EDIT MA-OEST.
2. Explanation – (Optional) enter a more detailed description. This field is 400 spaces.
3. Organization Document Number – (Optional) use for department reference. This field is ten spaces.

**Organization Tab**

The Organization tab captures all the detail attributes of the organization. Complete the required information.

![Organization Tab Image]

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 – 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 – 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.

**Notes and Attachments Tab**

The Notes and Attachments tab is a standard KFS tab and can be used to add any notes specific to this eDoc or attach any supporting documentation.

1. Enter any relevant notes or attachments and click Add to add them to the document.
Ad Hoc Recipients Tab

You may use Ad Hoc routing to route to another person or group in addition to the normal routing. Remember however, that each time the eDoc is routed to another approver it increases the time to final approval.

1. Action Requested – Prior to submitting the eDoc, your options are: FYI, Approve or Acknowledge. The Approve action is used to request approve or disapprove and until one of these actions is completed, the eDoc will not route to the next approver. The FYI action can be cleared from the results page of the individual’s action list. For the Acknowledge action, the eDoc must be opened and viewed. Neither the FYI or Acknowledge actions will hold the eDoc from moving forward. After the eDoc is submitted, you can still ad hoc route your eDoc but your options will only be FYI and Acknowledge; you no longer have Approve as an option.

2. Person – select from the lookup or enter the person’s UH username.

3. Actions – click Add to add the ad hoc recipient.

The ad hoc route request can be sent in two ways. If you do not want to approve the eDoc but want to send the ad hoc route request, click on the send ad hoc request button. In this case, the ad hoc recipient will receive the action request and the eDoc will remain in your Action List. If you want to approve the eDoc and also route it to the ad hoc recipient, click on the submit/approve (or disapprove) button and the ad hoc recipient will receive the action request and the document will no longer be in your Action List.

Route Log Tab

View the route log to find where your eDoc is in the approval routing. Click on the “show” button for additional information about a particular action.
Actions Taken

View the actions that have already been taken.

Pending Action Requests

View the Pending Action Request.

Future Action Requests

View the Future Action Requests.
Organization Maintenance Workflow

<table>
<thead>
<tr>
<th>Initiator</th>
<th>Campus Chart Manager (GALC)</th>
<th>University Chart Manager (GALC)</th>
<th>KFS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiator creates or updates an organization code and submits it for processing</td>
<td>Campus Chart Manager reviews and approves/disapproves the organization code maintenance</td>
<td>University Chart Manager reviews and approves/disapproves organization code maintenance</td>
<td>Organization code is added/updated in KFS</td>
</tr>
<tr>
<td></td>
<td>Organization maintenance approved?</td>
<td>Organization maintenance approved?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Organization document is disapproved</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Organization document is disapproved</td>
</tr>
</tbody>
</table>

Campus Chart Managers exist for UH-Manoa, UH-Hilo, UH-West Oahu, Community Colleges and UH Systemwide

Buttons

When initiating an organization eDoc the following buttons will appear:

- submit
- save
- close
- cancel

1. Click the Submit button to route for approval.
2. Click the Save button to continue editing in the future.
3. Click the Close button to close the eDoc.
4. Click the Cancel button to cancel the eDoc.

If the Organization eDoc is in your Action List for approval the following buttons will appear:

- send ad hoc request
- save
- reload
- blanket approve
- approve
- disapprove
- close

5. Click the Send Ad Hoc Request button to notify an individual about the status of the eDoc or to request an additional approval.
6. Click the Save button to continue editing in the future.
7. Click the Reload button to refresh your page after submission so that you can see the new status of your document. This may also be used if you want to revert your document to the last saved version.
8. Click Blanket Approve if you have the authority to approve for all pending approvers.
9. Click the Approve button to approve the eDoc and send to the next routing level.
10. Click the Disapprove button to disapprove the eDoc and FYI will be sent to the initiator and anyone else who previously approved the eDoc; the initiator may then copy the eDoc and begin the process again.
11. Click the Close button to close the eDoc.

**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.

### 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:

Sample of user’s roles with organization qualification:

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 billing address fields for MA-DNTR:

Sample printed PO with billing address from MA-DNTR:
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.