

Organization Review Delegate Global

(ORDG)

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| Document Summary | |
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| Date | 2015/09/16 |
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| **Lesson Objectives** | |
|  | On completion of this lesson you should be able to:   * Create a secondary delegate using the Organization Review Delegate Global document |

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| **Lesson Scenario** | |
|  | * As an existing staff member of the NWU you are required to work through this lesson, make some notes if necessary and print out the documentation as a guideline. |

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| **Lesson Prerequisites** | |
|  | * You need to be a NWU staff member that is registered on KFS as a user. * You need to be an existing approver on KFS. |

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10. **Organization Review Delegate Global**

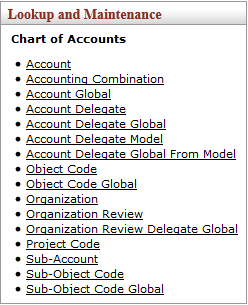


Figure 1

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| 1. | Click on **Organization Review Delegate Global** option **Lookup and Maintenance** submenu group in the **Chart of Accounts** submenu on the **Main Menu** tab. |

1. **Organization Review Delegate Global document**

* This screen opens up the **Organization Review Delegate Global** document. The tabs of this document in the example are set to  to make the discussion easier.

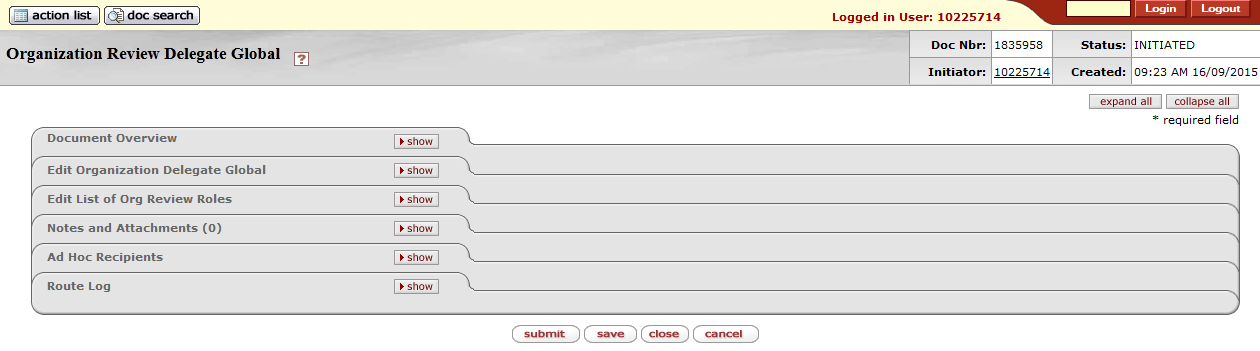


Figure 2

1. **Document Overview tab**

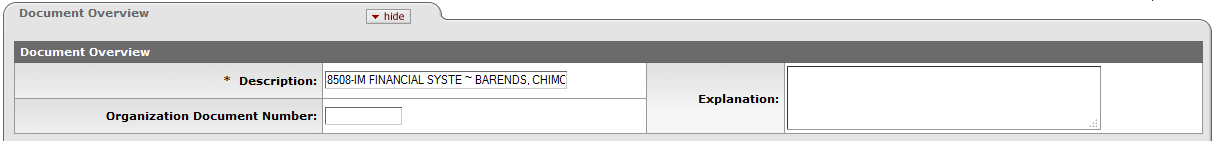


Figure 3

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| 1. | Click on  to expand the **Document Overview** tab. |
| 2. | It is not necessary to fill in this **Document Overview** tab; this is only a preview of how the screen will look. |
| 3. | Click on  to collapse the **Document Overview** tab. |

1. **Edit Organization Delegate Global tab**

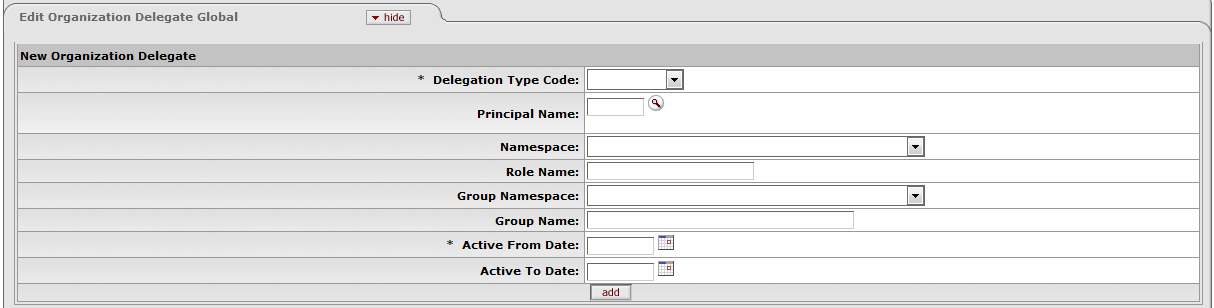


Figure 4

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| 1. | Click on  to expand the **Edit Organization Delegate Global** tab. |

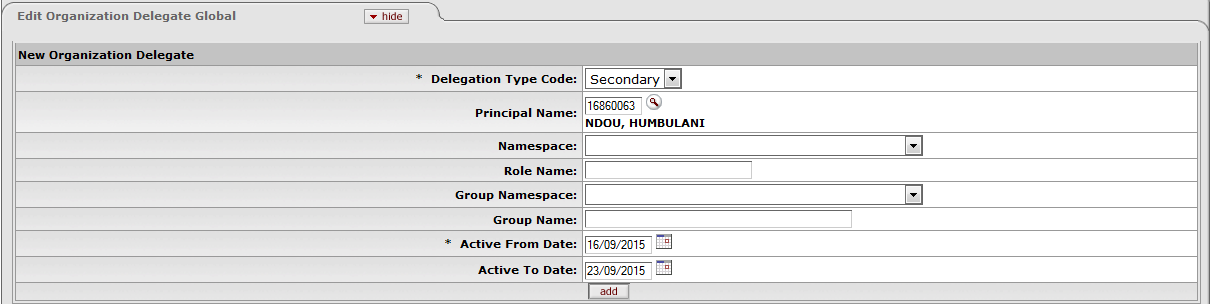


Figure 5

* **Please Note: The principal name is the person that need to act as the Delegate of the approver**

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| 1. | **Delegation Type Code**: Select **Secondary** from the  drop-down list. |
| 2. | **Principal Name**: Type or  search for the Principal Name.  **Note: Must preferable be a person on the same or higher rank than the approver of the organization.** |
| 3. | Type or search  in the **Active From Date** |
| 4. | Type or search  in the **Active To Date**  **Note: We prefer that every approver have a permanent delegate that could act during unforseen situation that will avoid transactions from being stuck in the workflow.** |
| 5. | Click on  to add the person to the Delegate list |

1. **Edit List of Org Review Roles tab**

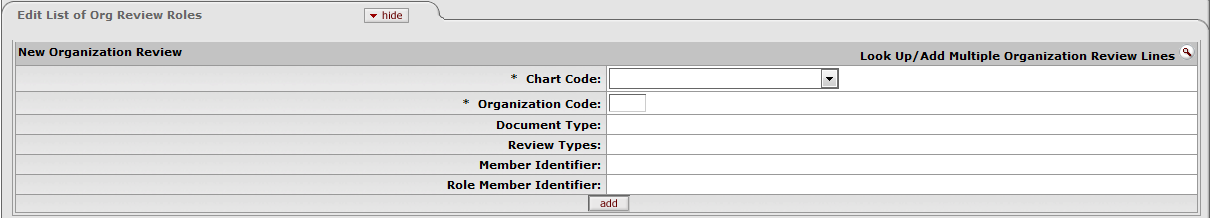


Figure 6

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| 1. | Click on  to expand the **Edit List of Org Review Roles** tab. |
| 2. | Click on  to open the |

**There are two ways to do a lookup:**

* On the **Principle Name** or **Organization Code**

The **Organization Code** lookup is preferred over the **Principle name** lookup unless approver is linked to to many Organizations codes at once. A document will need to be completed for each Organization for which the approver is responsible.

1. **Principle Name Lookup**

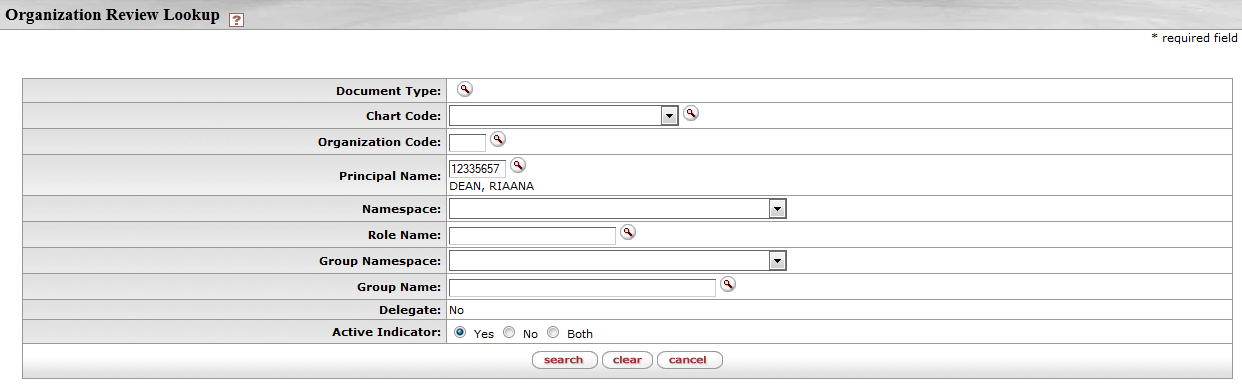


Figure 7

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| 1. | Type or  for the **Principal Name**. |
| 2. | Click on  to return the result. |

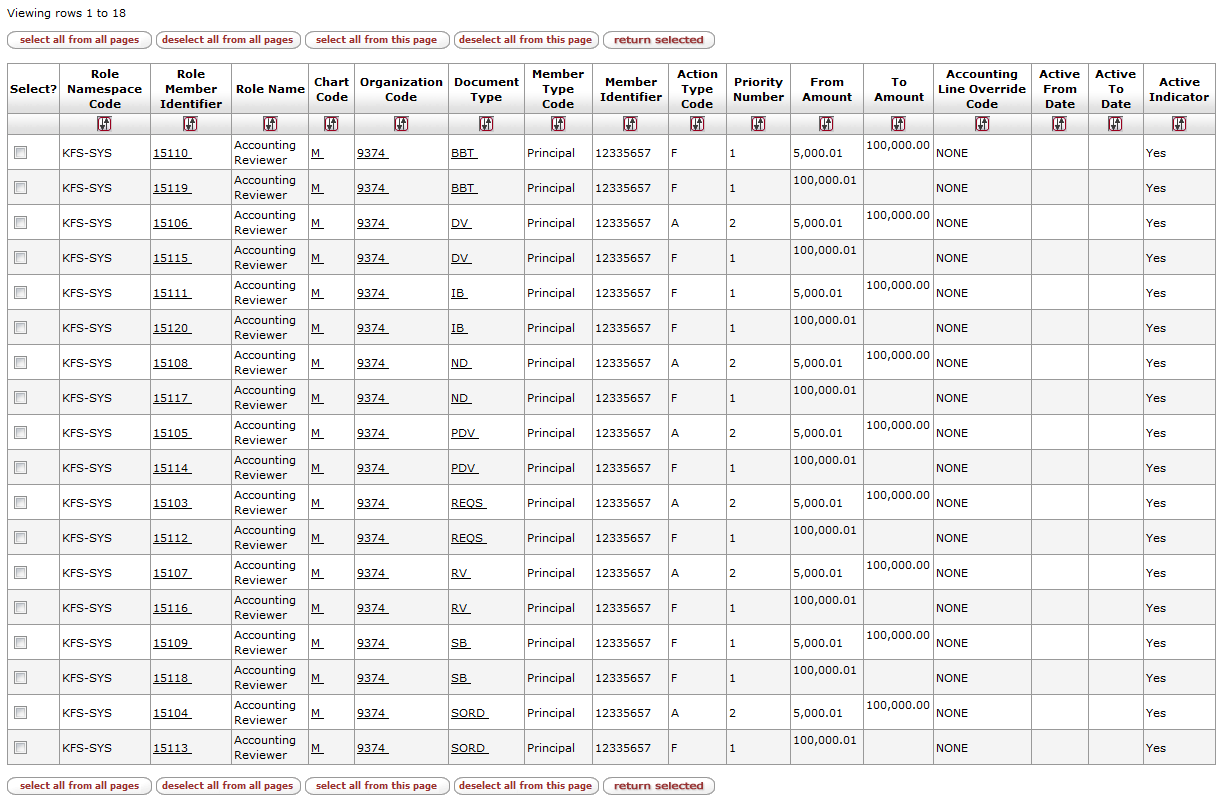


Figure 8

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| 1. | Click on  to select all the relevant documents or select only certain lines. |
| 2. | Click on  to return the selected documents. |

1. **Organization Code Lookup**

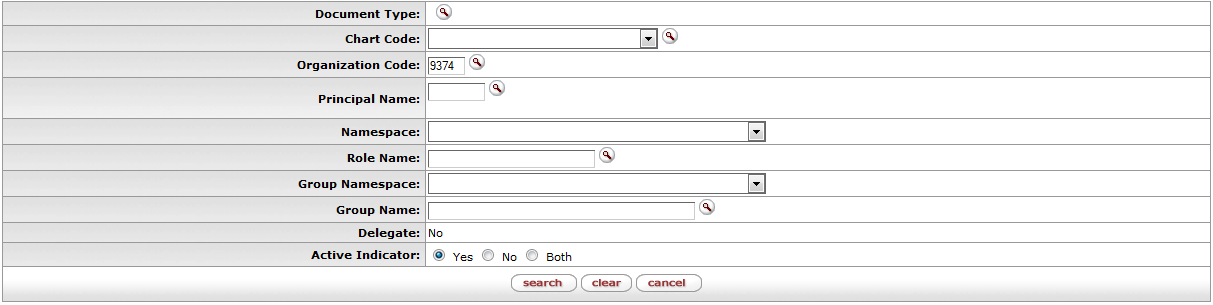


Figure 9

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| 1. | Type or  for the **Organization Code**. |
| 2. | Click on  to return the result. |

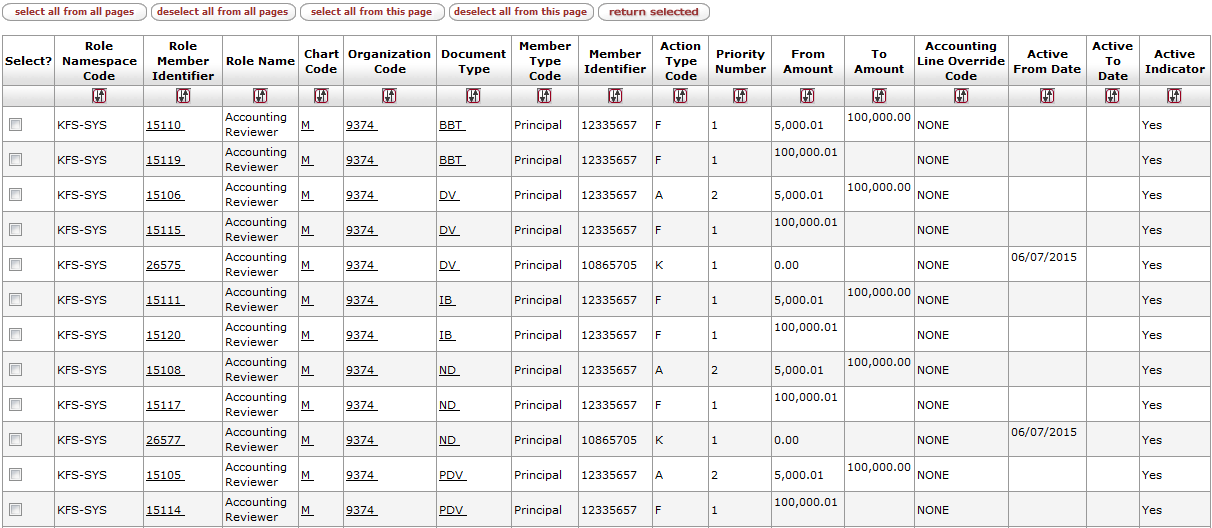


Figure 10

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| 1. | Click on  to select all the relevant documents or select only certain lines. |
| 2. | Click on  to return the selected documents. |

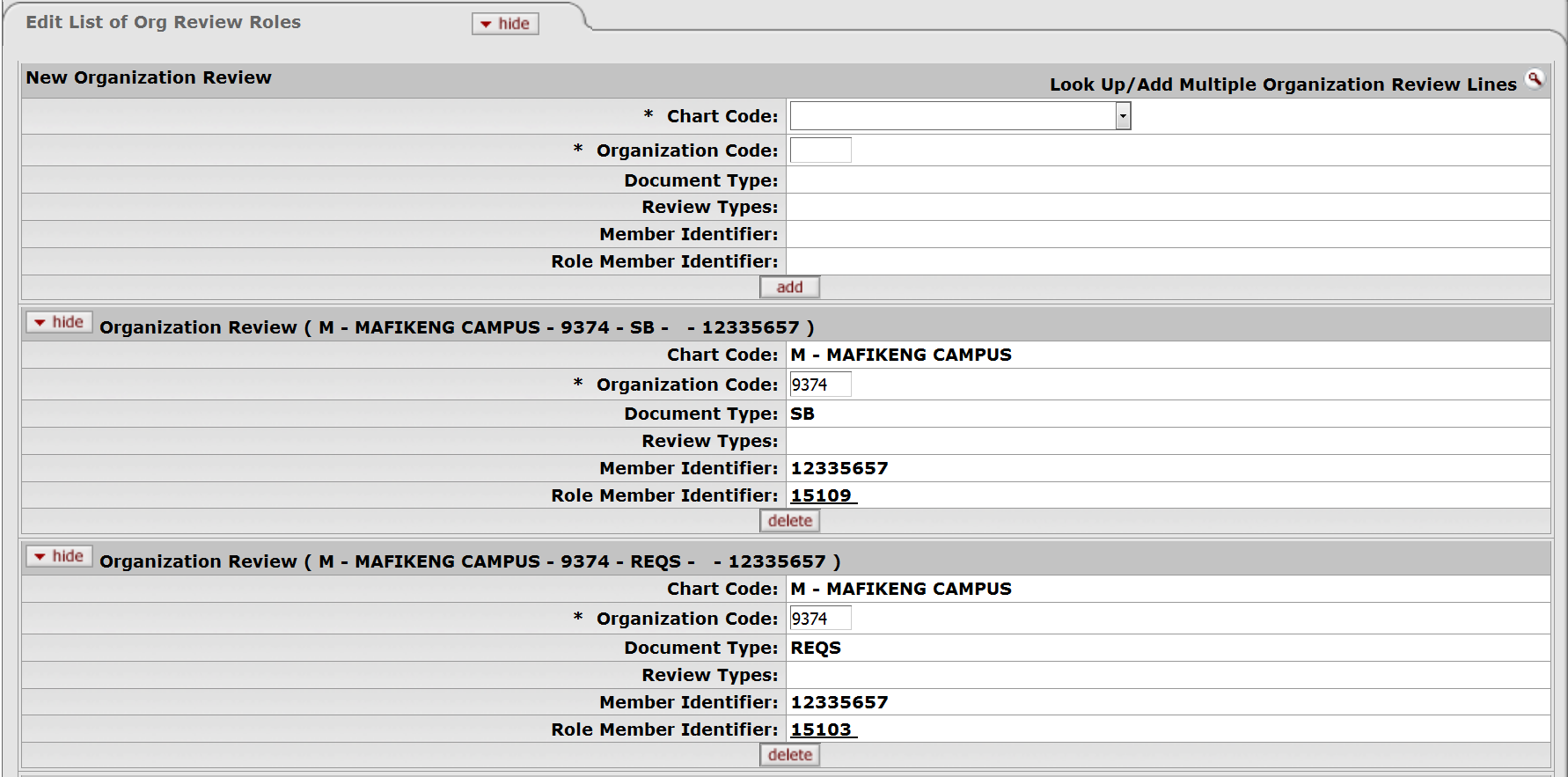


Figure 11

1. **Submit Document**



Figure 12

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| 1. | Click on  then the document will be in “**Final**” status. |

1. **Organization Review Delegate**

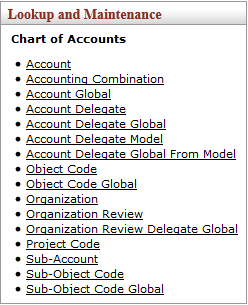


Figure 13

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| 1. | Click on **Organization Review** option **Lookup and Maintenance** submenu group in the **Chart of Accounts** submenu on the **Main Menu** tab. |

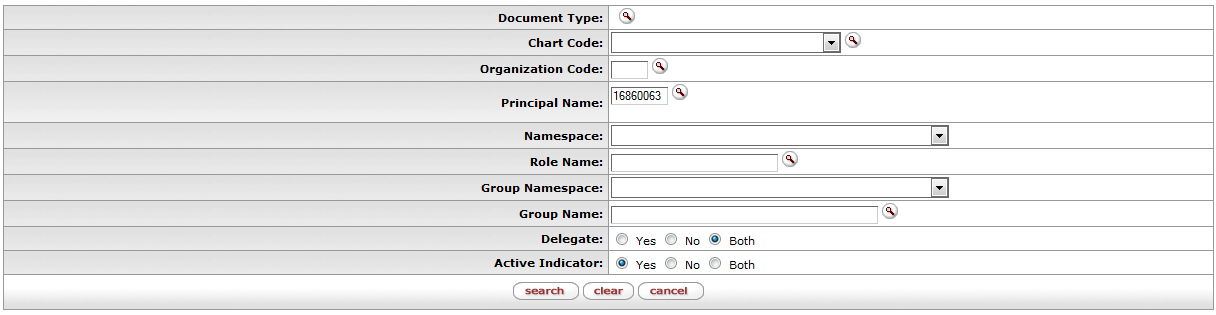


Figure 14

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| 1. | Type or  for the **Principal Name** or |
| 2. | Type or  for the **Organization Code**. |
| 3. | Select both for the **Delegate**. |
| 3. | Click on  to return results. |

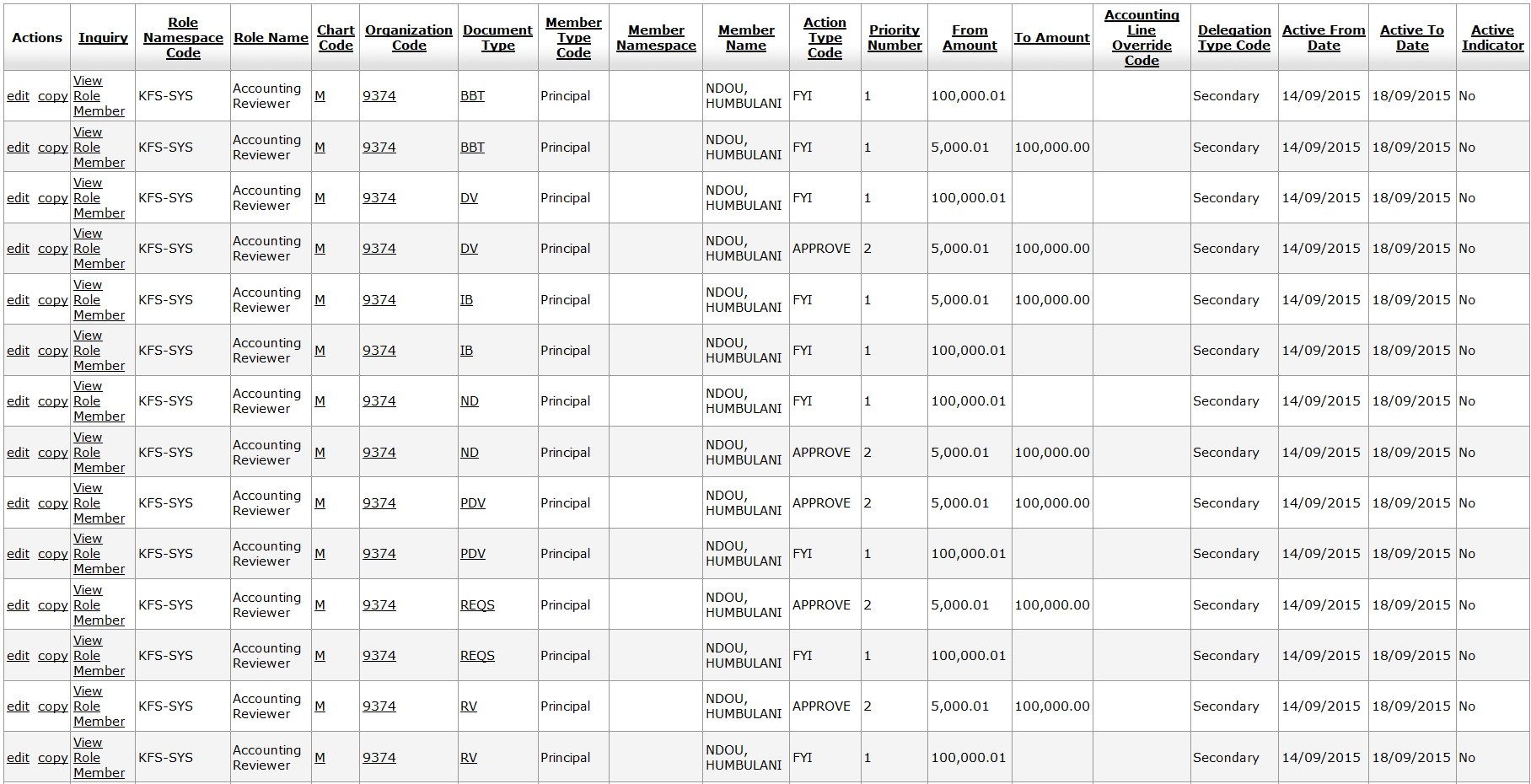


Figure 15

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| **Lesson Summary** | | |
|  | Having completed this lesson you should be able to:   * Create a Delegate on Organization for existing user. | |