

Organization Review Delegate Global

(ORDG)

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| Document Summary |
| Product Owner / Author | Carl Minné |
| Editor Name | Chimoné Barends |
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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.
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