

ORGANIZATION REVIEW



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WHAT IS ORGANIZATION REVIEW?

- **Establishing an Organization Review** creates an additional layer of review by an individual or review group that is outside of the pre-built workflow as the last routing stop for a document which meets specified criteria.

WHAT IS ORGANIZATION REVIEW?



- If a review group is selected for Organization Review, only one person in the group is required to approve an individual document.

WHY IS ORGANIZATION REVIEW IMPORTANT?

- Prevents unauthorized transactions, such as changes to fiscal officers, from occurring without departmental or college-level review and approval.



WHY IS ORGANIZATION REVIEW IMPORTANT?

- Allows for reviews of documents including viewing of images (source documents) that are attached.
- Without Organization Review, if an individual is not in the original routing, they can not view attachments.



WHY IS ORGANIZATION REVIEW IMPORTANT?

- Can be set up to override automatic document approval when the document initiator is also the approver.



HOW IS ORGANIZATION REVIEW DIFFERENT FROM AD HOC REVIEW?



- 🕒 Ad hoc review can be immediate (prior to Fiscal Officer approval.)
- 🕒 Organizational review is the last approval prior to finalizing a document.

HOW IS ORGANIZATION REVIEW DIFFERENT FROM AD HOC REVIEW?



■ Automatic:

- Once Organization Review is set up, any document that meets the specified criteria will be automatically routed to the assigned org. reviewer or group. Ad hoc review must be requested each time. (*You mean I have to remember?!*)

WHAT ARE THE MINIMUM REQUIREMENTS FOR SETTING UP ORGANIZATION REVIEW?

- Chart code
- Organization code (College or Dept.)
- Document type
- Individual reviewer, role name or review group name
- Action type (Approve, FYI, Acknowledge)
- Action policy code (if Org Review is assigned to a group.)

WHICH DOCUMENTS CAN HAVE ORGANIZATION REVIEW?

- Document types: CAM, COA, EC, FB, LD, PRAP [Note: a separate Org Review Role document must be created for each document type.]
- Specific documents, i.e. Internal Billing, DV, etc.

WHAT CRITERIA CAN BE ESTABLISHED?

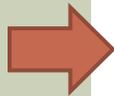
- Fund Group Code, Sub-Fund Group Code, Object Sub-type Code, date ranges, time ranges, transaction amounts or ranges, and in some instances, Accounting Line Override Code.
- Org review can be set up as FYI, Acknowledge or Approve
- The “Force Action” box must be checked to prevent bypass of the Org Review if the initiator of the document is also the approver.

HOW CAN I SET UP ORGANIZATION REVIEW?

- From the UAccess Financials Main Menu, Navigate to Lookup and Maintenance>Workflow>Organization Review

Workflow

- [Account Delegate](#)
- [Account Delegate Global](#)
- [Account Delegate Model](#)
- [Account Delegate Global from Model](#)
- [Group](#)
- [Organization Review](#)



HOW CAN I SET UP ORGANIZATION REVIEW?

■ Complete the Document Overview Tab

The screenshot shows a web browser window with the URL <https://financials.uaccess.arizona.edu/kfs-prd/kt/maintenance.do?methodToCall=docHandler&docId=378520&command=displayDocSearchView#topOffForm>. The page title is "Organization Review Role".

Doc Nbr: 378520	Status: FINAL
Initiator: aem	Created: 04:54 PM 10/06/2011

Document Overview

* Description: 3001 Create Org Review PRAP 3001	Explanation: 3001 Create Org Review PRAP 3001 Sets up routing for purchasing/ap docs to deans for fyi
Org. Doc. #:	

Organization Review

Assignee / Delegation

Notes and Attachments (0)

Ad Hoc Recipients

Route Log

* required field

HOW CAN I SET UP ORGANIZATION REVIEW?

- Complete the **Organization Review** tab. At minimum, you need to type in the **Chart Code**, **Organization Code**, and **Document Type**
- Choosing a document type populates the **Review Types** field automatically
- **Optional:** You can also specify the **fund group code**, **sub-fund group code** or **object sub-type code** to further refine the criteria for organizational review.

Document Overview

Organization Review

New

Chart Code:	UA - University of Arizona-Management
Organization Code:	3001
Fund Group Code:	
Sub-Fund Group Code:	
Object Sub-Type Code:	
Document Type:	PRAP
Review Types:	Organization Accounting Only

HOW CAN I SET UP ORGANIZATION REVIEW?

- Complete the **Assignee / Delegation Tab**
- Optional: If you want to limit your review by amount, complete the **From and To Amount** tabs

Assignee / Delegation ▼ hide	
New	
	From Amount:
	To Amount:
	Accounting Line Override Code:
	Principal Name: -
	Namespace:
	Role Name:
	Group Namespace: KFS-SYS - Financial System
	Group Name: UA Eller Dean's Office Review
	Action Type Code: FYI
	Priority Number:
	Action Policy Code: ALL
	Force Action: No
	Active From Date:
	Active To Date:

HOW CAN I SET UP ORGANIZATION REVIEW?

- **Optional:** The **Accounting Override Code** is available only if the Review Type (from the Organizational Review Tab) is either “Organization Accounting Only” or “Both”.
- If you want to trigger Organization Review when a transactional document includes an Accounting Line with a particular override code, enter it here, or leave it blank if you want an Org. Review regardless of the override code.

Assignee / Delegation ▼ hide	
New	
From Amount:	
To Amount:	
 Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- To designate an individual organization reviewer, enter the employee's NetID in the **Principal Name** field.

Assignee / Delegation ▼ hide

New

From Amount:	
To Amount:	
Accounting Line Override Code:	
 Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- OR, to generate workflow to a particular role, select the **Namespace** associated with that role; and
- Enter the corresponding **Role Name**

Assignee / Delegation ▼ hide	
New	
From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
 Namespace:	
 Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- OR, to generate workflow action requests to a particular group, select the **Group Namespace** associated with that group; and
- Enter the corresponding **Group Name**

Assignee / Delegation ▼ hide

New

From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
 Group Namespace:	KFS-SYS - Financial System
 Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- Choose the **Action Type Code** for organization review.
- Optional: You can also assign a priority level in the **Priority Number** field

Assignee / Delegation ▼ hide

New

From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
 Action Type Code:	FYI
 Priority Number:	
Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- If assigning Organization Review to a group, the **Action Policy Code** field must be complete. Change to “ALL”.

Assignee / Delegation ▼ hide

New

From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
 Action Policy Code:	ALL
Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- If the person who initiates an e-doc is also the approver, UAccess Financials will automatically mark the approval as completed. Checking the **Force Action** box will require Org Review to complete approval regardless of who initiated the document.

Assignee / Delegation ▼ hide	
New	
From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
 Force Action:	No
Active From Date:	
Active To Date:	

HOW CAN I SET UP ORGANIZATION REVIEW?

- Optional: You can complete the **Active From Date** or **Active To Date** to limit the Organization Review to a particular time range.

Assignee / Delegation ▼ hide	
New	
From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	-
Namespace:	
Role Name:	
Group Namespace:	KFS-SYS - Financial System
Group Name:	UA Eller Dean's Office Review
Action Type Code:	FYI
Priority Number:	
Action Policy Code:	ALL
Force Action:	No
 Active From Date:	
 Active To Date:	

RECOMMENDED BEST PRACTICE:

- Set up **Organization Review** for all COA documents to ensure college-level review of maintenance values (Fiscal Officer, account changes, etc.)



RECOMMENDED BEST PRACTICE:

- Organization Review with “**Forced Action**” for documents which are or may be initiated by approvers to ensure a second layer of review.



RECOMMENDED BEST PRACTICE:

- Establish supervisor or college-level review of transactions initiated or approved by **new** fiscal officers or other employees



RECOMMENDED BEST PRACTICE:

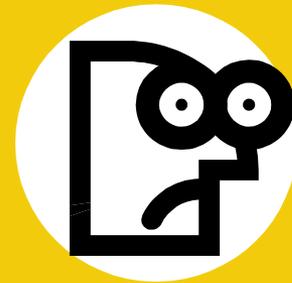
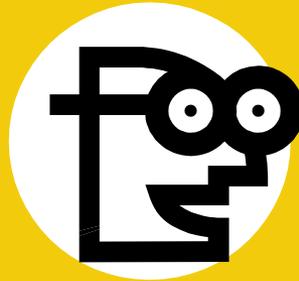
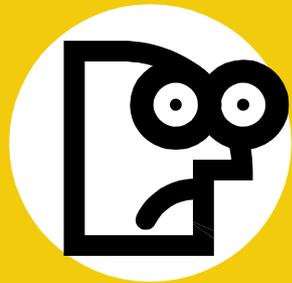


- Use **Organization Review** for other transactions which may require additional or college-level oversight

RECOMMENDED BEST PRACTICE:



- Be sure to set up **Organizational Reviews** on your groups to prevent unauthorized additions or deletions of review group personnel.



It's QUESTION TIME!!