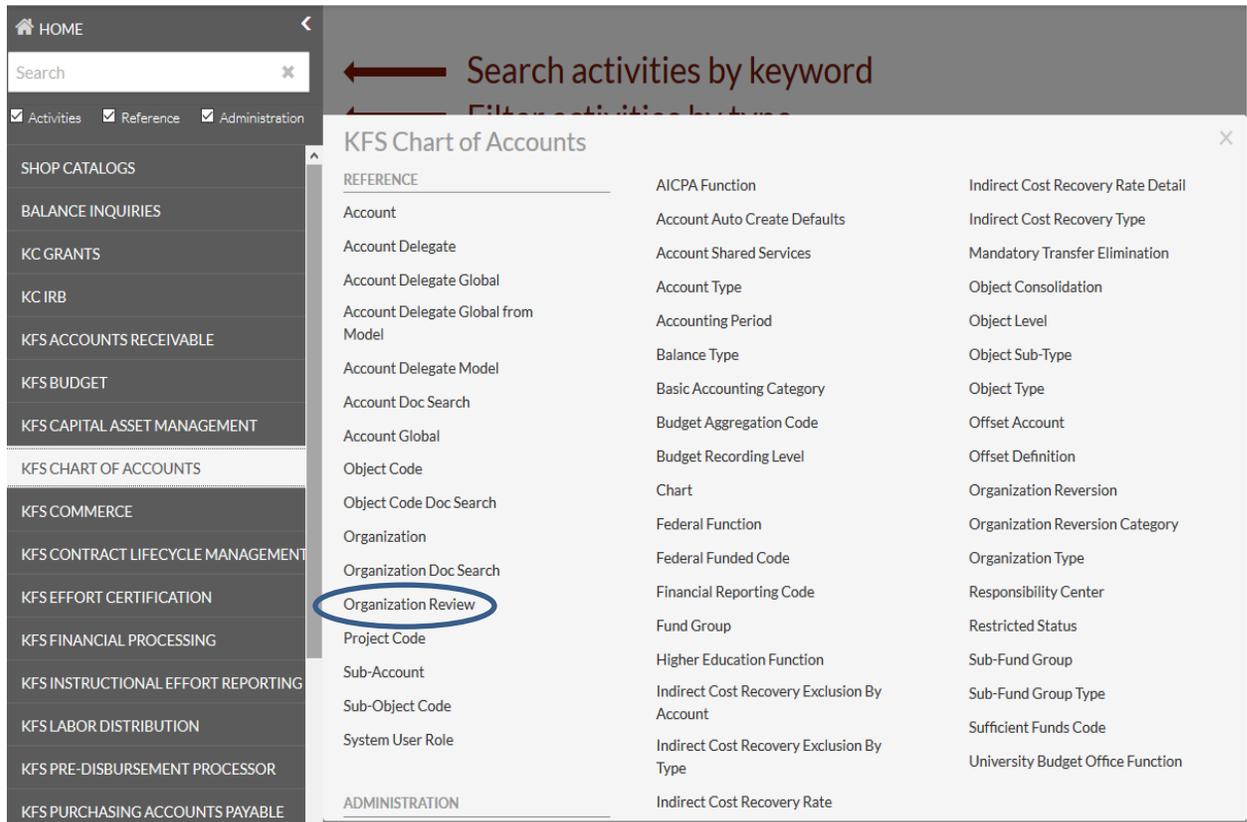


Creation of Org Review

1. Click Create Organization Review Document from the “Chart of Accounts” section



2. Click “create new” button in the upper right corner.
 - A blank document with a new document ID appears.
3. Enter the Description in Document Overview tab.

The screenshot shows the 'Document Overview' tab. The 'Description' field is filled with the text 'create new org review routing BA BKOS'. The 'Organization Document Number' field is empty. The 'Explanation' field is also empty.

4. Enter in the Chart Code, Organization Code and Document Type on the Organization Review tab.
 - a. The Chart Code can be selected by the drop down box.
 - b. In order to select the Organization Code, you can either enter in the organization code or do a lookup. The organization review that is specified on this document will pertain to all of the organizations that report to the organization specified in this field.
 - c. To select the document type, the user should click on the lookup. Once the user is on the Document Type Lookup, the user should enter ‘AV’ into the Name field and click search. Once the values are returned, please click on return value for ‘AV’. By selecting AV, the organization review will be established for the AVAD, AVAE and AVRC.

- d. The Review Type will automatically be populated once the Document Type is selected.

Organization Review	
▼ hide	
New	
* Chart Code:	BA - BLOOMINGTON AUX
* Organization Code:	BKOS
* Document Type:	AV
Review Types:	Organization Accounting Only

5. Enter in organization routing information on the Assignee/Delegation tab.
- The user can either route the document to an individual or to a group. If the user wants to route the document to a specific individual, the user should enter in the user id of the individual in the principal name field. If the user wants to route the document to a group, the user should enter in group name.
 - The user should select the action type code 'approve' from the dropdown box.
 - The Action Policy Code will default to 'First'. The user does not need to make any changes.
 - If a user wants to force the document to be routed back to them even if they initiated or took action earlier in the process then they should click the checkbox.
 - As a general rule, the "Active From Date" and "Active To Date" do not need to be populated. However, if a user wants to create organization routing for a period of time, they can utilize these fields to do so.

Assignee / Delegation	
▼ hide	
New	
From Amount:	
To Amount:	
Accounting Line Override Code:	
Principal Name:	@bauters Bauters, Julie R.
Namespace:	
Role Name:	
Group Namespace:	
Group Name:	
* Action Type Code:	APPROVE
Priority Number:	
* Action Policy Code:	FIRST
Force Action:	<input type="checkbox"/>
Active From Date:	
Active To Date:	

- f. Click submit.