

# KUALI FINANCIAL SYSTEM

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## UNIVERSITY of CALIFORNIA • IRVINE

### QUICK START GUIDE: LOOK UP AN ORGANIZATION



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**Summary:** The Organization document defines the entities representing units at many different levels within the institution, e.g. department, responsibility center, 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.

**Replacement:** The KFS Organization Lookup replaces Org Table

Steps	What you need to do	How to do it																						
1	Access KFS via ZOTPortal	<ol style="list-style-type: none"> <li>Use your UCInetID and password to log in to <a href="https://portal.uci.edu/">https://portal.uci.edu/</a></li> <li>Press the <b>Faculty and Staff</b> tab and then select the <b>KFS</b> tab</li> </ol>																						
2	Access Organization	<ol style="list-style-type: none"> <li>From the KFS <b>Lookups and Request</b> portlet expand the <b>Chart of Accounts</b> bullet</li> <li>Select <b>Organization</b></li> </ol> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p style="margin: 0;"><b>Chart of Accounts</b></p> <ul style="list-style-type: none"> <li><a href="#">Account</a></li> <li><a href="#">Account Global</a></li> <li><a href="#">Account Delegate</a></li> <li><a href="#">Account Delegate Global</a></li> <li><a href="#">Account Delegate Model</a></li> <li><a href="#">Account Delegate Global From Model</a></li> <li><a href="#">Object Code</a></li> <li><a href="#">Object Code Global</a></li> <li style="border: 2px solid red; padding: 2px;"><a href="#">Organization</a></li> </ul> </div>																						
3	Search	<ol style="list-style-type: none"> <li>Enter desired search criteria: <ul style="list-style-type: none"> <li>Enter IR in Chart Code field</li> </ul> </li> </ol> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p style="margin: 0;">Organization Lookup <span style="float: right;">create new</span></p> <p style="text-align: right; margin: 0;">* required field</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Chart Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Organization Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Organization Name:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Organization Type Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Reports to Chart Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Reports to Organization:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Organization Physical Campus Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Organization Level Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text"/></td> </tr> <tr> <td style="padding: 2px;">Research Type Code:</td> <td style="padding: 2px;"><input style="width: 80%;" type="text" value="None"/></td> </tr> <tr> <td style="padding: 2px;">Active Indicator:</td> <td style="padding: 2px;"> <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both </td> </tr> <tr> <td colspan="2" style="padding: 2px; text-align: center;"> <input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/> </td> </tr> </table> </div> <p style="margin-top: 10px;">Note: Users can search some fields using only partial information by placing an asterisk (*) before and after the text portion of the search criteria</p> <ol style="list-style-type: none"> <li>Press the search button once you have entered search criteria <ul style="list-style-type: none"> <li>Complete more fields to further refine your search</li> </ul> </li> </ol>	Chart Code:	<input style="width: 80%;" type="text"/>	Organization Code:	<input style="width: 80%;" type="text"/>	Organization Name:	<input style="width: 80%;" type="text"/>	Organization Type Code:	<input style="width: 80%;" type="text"/>	Reports to Chart Code:	<input style="width: 80%;" type="text"/>	Reports to Organization:	<input style="width: 80%;" type="text"/>	Organization Physical Campus Code:	<input style="width: 80%;" type="text"/>	Organization Level Code:	<input style="width: 80%;" type="text"/>	Research Type Code:	<input style="width: 80%;" type="text" value="None"/>	Active Indicator:	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Both	<input type="button" value="search"/> <input type="button" value="clear"/> <input type="button" value="cancel"/>	
Chart Code:	<input style="width: 80%;" type="text"/>																							
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200 items found, displaying 1 to 100. First Prev PAGE 1, 2 Next Last

Actions	Chart Code	Organization Code	Organization Name	Organization Type Code	Reports to Chart Code	Organization Code and Description	Organization Level Code	Active Indicator	Organization Manager Principal Name
<a href="#">edit</a> <a href="#">copy</a>	IR	1234	Test Organization		IR	5002-COMMUNITY AND ENVIRONMENTAL MEDICINE		Yes	 keiko
<a href="#">edit</a> <a href="#">copy</a>	IR	5002	COMMUNITY AND ENVIRONMENTAL MEDICINE	D	IR	7096-MEDICINE	L - LOWEST LEVEL	Yes	 rclayman