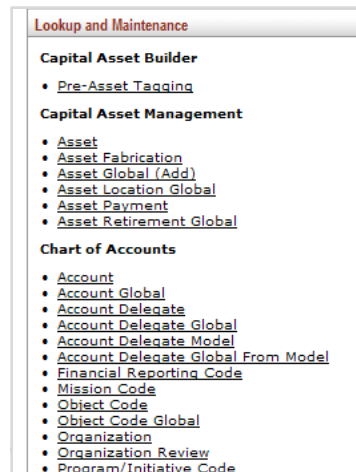


## Implementing Organization Review for PCard Transactions

**Overview:** Fiscal officers or those with a financial document preparer role in KFS may set up an approval workflow via Organization Review as part of a PCard compliance plan. Organization review occurs after FO approval of PCard transaction eDocs (PCDO). Per PCard policy, PCDO eDocs need to be fully routed and approved—including Organization Review steps—within 45 days of the eDoc’s created date.

1. Log in to [ebs.msu.edu](https://ebs.msu.edu) and click the **Financial System** tab.
2. In the Lookup and Maintenance column, click the **Organization Review** link under the section titled Chart of Accounts.



3. In the Organization Review Lookup screen, select **Create new**.



4. In the Document Overview tab, enter the eDoc **Description** and **Explanation**.
5. In the Organization Review tab:
  - a. Enter the unit’s Organization Code.
  - b. Enter **PCDO** in the **Document Type** field.
  - c. Under the Assignee/Delegation tab update the following fields as needed:
    - i. **From Amount and To Amount:** Add a “minimum” eDoc dollar amount in the From Amount field and/or a “maximum” eDoc dollar amount in the To Amount field. If left blank, PCDO eDocs will always route to the assignee(s) following FO approval, regardless of eDoc dollar amount.
      1. **Note:** These amounts are for the entire amount of an eDoc, and one eDoc may contain multiple PCard transactions.
    - ii. **Accounting Line Override Code:** Limit the types of routed transactions to those with the selected override code, including:
      1. Expired account (EXP\_ACCT)
      2. Non-budgeted object code (NON\_BDG\_OBJ)
      3. Transaction exceeded remaining budget (TRAN\_EXCD\_REM\_BDG)
      4. Non-fringe account (NON\_FR\_ACCT)
    - iii. **Principal Name:** Individual person the Organization Review step would be assigned to.



- iv. **Role Name:** Role type the Organization Review step would be assigned to.
  - v. **Group Name:** Group of employees the Organization Review step would be assigned to.
    - 1. **Note:** Either the principal name, role name, or group name field must be completed.
  - vi. **Action Type Code:** The action the assignee will need to take on PCDO eDocs routed as part of the Organization Review. Can be either: approve (the eDoc will not proceed from this step until the assignee has approved), FYI, or acknowledge.
  - vii. **Priority Number:** The order of Organization Review assignees eDocs will route through following the fiscal officer. If left blank, all assignees will receive the eDoc at once following FO approval.
  - viii. **Force Action:** If the assignee is the initial router of the eDoc, the Organization Review will still route to them. Must be checked in order for an entire assigned group to receive the Organization Review if one member of the group initiated the eDoc or took action as the FO.
  - ix. **Active From Date and Active To Date:** The start date (Active From Date) or end date (Active To Date) of this workflow. Active From Dates cannot be retroactive, but can be either today's date or a future date. Active To Dates can be set to a future date, left blank, or set as 12/31/9999.
- d. Add Notes and Attachments or Ad Hoc Routing to the Organization Review eDoc as appropriate.