Oracle COA Management Guide

Financial Planning & Analysis

UC Riverside

Last Modified June 21, 2023

COA Training

The structure of the Chart of Accounts is based on UCOP's reporting requirements. Certain areas have flexibility that can be managed here in the Oracle COA Management tool.

What can you request in Oracle COA Management?

- Updated description for the activity, department, division, Org, and/or Flex1
- Movement within the activity hierarchy (for example if there is a reorganization)
- A Flex1 or Activity segment be added

Are there any approvals related to Oracle COA Management?

Yes! After the Department SAA establishes Department Requestor and Approver (CFAO-level) roles in EACS, departments can then initiate requests in Oracle COA Management.

The department requestor will initiate the request, then it is approved by the CFAO (or CFAO designee) before it is routed to the Central Budget Office (CBO) for final approval.

Guidelines for COA Values and Descriptions

For all Flex1 requests, segment descriptions should be easy to understand by end users, avoid special characters, and minimize the length to only what is necessary.

Flex1 Requestors and Approvers should ensure nodes and descriptions are unique

New Segments in the Activity Tree requests are considered when no other Golden Tree segment identifies what you want to track (i.e. fund, BC, etc.)

For more information on valid COA combinations and Cross-Validation Rules, sign up for courses in the LMS system.

1. Log into the system.

This will be in rSpace once we go live. Until then, use the below link.

a. EMP Oracle Cloud -

https://edm-test-ucriverside.epm.us-phoenix-1.ocs.oraclecloud.com/epm/

b. Click on Shibboleth_QA.

Cloud Infrastructure
ORACLE Cloud ucriverside Oracle Cloud Account Sign In Identity domain () OracleIdentityCloudService
User Name User name or email Password
Password Forgot Password? Sign In
Or sign in with Shibboleth_QA

c. Login with NetID and password and authenticate via the UCR system.

UC RIVERSIDE	
UCR NetID:	
Cores -	
Password:	
SIGN IN	
Forgot your password?	
Learn about MFA	
Need help?	

2. Creating a Flex 1 code.

a. Click on 'Views.'

Enterprise Data Manageme	nt Cloud					 Jennifer Douglas
JD Jennifer	(B) Vorse	Requests	Applications	Acche Types	Herarchy Sets	O O O O Node Sets
Introduction Activity Introducing Enterprise Data Management Cloud	Properties	Leokup Sets	Connections	Reports	Ща лин	Academy

b. Click on 'UCROFC.'

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88		t View GL - EP! for GL and EPM	M (Do Not Use Fo	r Changes or New	Requests)			JV Jesus Villavio 9/8/2022	encio	SB Shannon B 4/11/2023	urndred	
88	Flex1 Split Vi Flex1 View for		(Do Not Use For C	hanges or New Re	quests)			JV Jesus Villavio 9/8/2022	encio	SB Shannon B 4/11/2023	urndred	
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	UCROFC UCROFC Defau	ult View						JV Jesus Villavio 8/30/2022	encio	JV Jesus Villav 8/30/2022	vicencio	

c. Scroll over to 'Flex 1| V1.'

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	UCROFC								New Request Close
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Bř	I ✓ Name				\smile		:	Properties Locations History	
	,							Q	11 Properties

d. Click the '>' to view the tree.

= U	CRIVERSIDE Enterprise Data Management Cloud					🛆 Jennifer Douglas 🔻
	UCROFC					New Request Close
12 12	Natural Account V1 Account UCOP V1 A Q $<~>~\underline{4}$	CTIVITY VI FUND VI	Flex 1 V1 : Elex2 V1	Account List (Do No Al	Not Change) Activity List (Do Not Change)	Select Viewpoint
82	I ✓ Name			: Pr	Properties Locations History	
					۹	11 Properties

e. Click on the '>' to open up the tree (ORG & Department Code) until the Flex 1 codes are shown.

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	UCROFC		New Request Close
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	0 000000000 0 000000000	Q	11 Properties
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	O D010010000	Start Date	
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f. Click on 'New Request.'

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=	UCROFC					New Request Close
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	↓ C1 D010010000			Star	t Date	
	 D01001QBYT 			End	Date	

g. Click on the 3 horizontal dots next to the department code and then click 'Add Child.'

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			 ○ D00000006 > D0000000 ♦ D0000000 ♦ D00000000 		ert Here	Budgeting Iption US	No Instruction and Prog Support Dept 3
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			 > □ D010047891 > □ D020900000 	Ren Del	move lete		
			▶ D org100000				

OR click on the Flex 1 code 3 horizontal dots and then click 'Add Sibling.'

	-
	* Name
→ D010010000	Start
OD1001QBYT	End [
© D01001QG01	
© D01001QG02	Add Child
© D01001QG03	Add Sibling
◇ D01001QG04	
	Сору

- h. Click on 'Name' (must be 10 characters long including space) and click on the 'Description US' (no more than 30 characters long and has a restriction on special characters entered).
 - i. The name needs to include the 6-digit Department code and 4 other digits.
 - ii. Then add the Description US.
 - iii. No other fields need to be adjusted.

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	All Items	Q :	LalL0000000 000000000 Conground			Q.	11 Properties
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			 D01001QU01 D01001QU02 			Parent Tree Label	4 D010010000
			♦ D01001QU03				

- iv. Click on 'Submit.'
- v. Draft request number shows at the top with the tree details.
- vi. The request is now in flight and is waiting on further approvals.

3. Adding a Department code if it is not showing in the tree.

- a. Find the ORG that needs the Department code added
- b. Click new request at the top right
- c. click on the 3 dot located at the end of the ORG name that is highlighted in blue

d. click "Add Child"

UCROFC - Request 6030

 Account UCOP V1 Account UCOP V1 	ACTIVITY V1	FUND V1	Flex 1 V1	:	Flex2 V1	Activity Lis	st (Do Not Chang ORG100000C
! ✓ Name							Properties
¢ 000000000							Q
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► 🗅 ORG1300000						Ad	dd Sibling
► C ORG1400000						Co	ру
✓ ☐ ORG1500000						М	odel After 🕨

- e. Enter the Name as the department code followed by four zeros DoXXXX0000 (10 digits)
- f. Change Summary to "YES"
- g. Enabled is "YES"
- h. Allow Posting is "NO"
- i. Allow Budgeting "NO"
- j. Add a Description

Properties Locations History	
Q	11 Properties
/ * Name	DOXXXX0000
Start Date	
End Date	
Summary	Yes
Enabled	Yes
Allow Posting	No
Allow Budgeting	No
* Description US	TEST
Level	3
Parent	ORG1000000
Tree Label	

k. All sections you are adjusting are in yellow

- l. To continue to add Flex 1 fields to this request follow steps g. through h in section 2.
 - i. If the request is submitted before Flex 1 are added, you will need to wait for the request to be approved before you can add the Flex 1.
 - ii. It is recommended that you create the Flex 1 codes and submit one request will multiple Flex 1 codes under the same department code.

4. Changing a Flex 1 field.

Follow steps a. through f. in section 2.

- a. Go to 'View.'
- b. Then 'UCROFC.'
- c. Scroll over to 'Flex 1| V1.'
- d. Then click the '>' to view the tree.
- e. Continue to click on the '>' to open the tree (ORG & Department Code) until the Flex 1 codes are shown.
- f. Click on 'New Request.'
- g. Click on the flex code you would like to change.
- h. Update the 'Name' and/or 'Description US.'
- i. Click on 'Submit.'
- j. The request is now in flight and is waiting on further approvals.

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	All Items Q	+	 O000000000 				Q	11 Properties
	D01001TEST 3						🖍 * Name	D01001QG0i
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	D01001QG0i 2	:	OD1001QG01 OD1001QG01	*		:	Summary Enabled	No Yes
	Flex 1 VI	:	 D01001QG03 D01001QG04 				Allow Posting Allow Budgeting	Yes
			 D01001QG05 D01001QINT 				* Description US	Grad Student Professional Dev Award
			D01001QU01			,	Level	4
			¢ D01001QU02				Parent	D010010000
			♦ D01001QU03				Tree Label	

5. Deactivating a Flex 1 field.

Follow steps a. through f. in section 2.

- a. Go to 'View.'
- b. Then 'UCROFC.'
- c. Scroll over to 'Flex 1| V1.'
- d. Then the '>' to view the tree.

- e. Continue to click on the '>' to open the tree (ORG & Department Code) until the Flex 1 codes are shown.
- f. Click on 'New Request.'
- g. Click on the flex code you would like to deactivate.
- h. Click on 'End Date' cannot be today's date and needs to be future dated (recommended to be the end of the month).
- i. Change the 'Description US' to add the word 'INACTIVE' at the beginning of the description.
- j. Change 'Allow Budgeting' to 'NO.'
- k. DO NOT change 'Summary' or 'Allow Positing,' they should remain 'No' and 'Yes' respectively.
- l. Click on 'Submit.'

= UC RIVERSIDE Enterprise Data Managem ≣ < UCROFC - Request 5641 Request 5641 Submit Actions • Done 76 louglas. t LICOR LV1 ACTIVITY | V1 ELIND LV1 Flex 1 | V1 Flex 2 | V1 int List (Do Not Change) Ш Activity List (D 2 T D01001QBYT $Q \leftrightarrow A_{1}$ +B 0 H Properties Locations Histo Q All Items Q • 00000000 3 D01001TEST - D ORG1000000 * Name Start Dat **B**: OD10010BY End Date OD1001QG0 1 : Flex 1 | V • D01001QG0 No OD10010 D010010G04 No • D010010G0 D01001QIN 0.001001010 OD10010U02 Tree Labe > D010010U0 Request 5641 UCRO দ্ব Þ. Q

m. The request is now in flight and is waiting on further approvals.

6. Request Created in Error.

These can be deleted two ways.

- a. 1st way
 - i. Click on the flex code.



- ii. Click on the 3 dots.
- iii. Click on delete.
- b. 2nd way
 - i. Click on the Request Number.
 - ii. Click on the 3 dots.
 - iii. Click on delete.

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7. Reviewing a Request

- a. Use the home button on the top right of the screen next to your name.
- b. Click on 'Request.'



c. This will show you all the requests you have created and their respective statuses.

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		Views	Requests	Applications	Orde Types	संग्रहे Hierarchy Sets	s Node Sets	Properties	Lookup Sets	Connections	Reports	☐ Audit	▶ Academy	
eque	est Activity													Delete Requests
lequest II	ID	View All	Request Type All	Status All		Stage All	Owner		My Activity	Time Frame Last 30 Days				3
<u>ل</u> ي د	5 *													35 Reques
	Request ID	Title and Description		View	v Requ	uest Type	Status and Stage	Items	Request Issues	Age (In Days)	Owner		Modified	Actions
כ	5641	Request 5641 Request for UCROFC creat	ed by Jennifer Douglas.	UCR	OFC Inter		Draft Submit	3	0	O		ennifer Douglas ssigned	JD Jennifer Douglas 5/30/2023	
כ	5628	Request 5628 Request for UCROFC creat	ed by Jennifer Douglas.	UCR	OFC Inter		Completed Closed	1	0	o		ennifer Douglas ubmitted	SB Shannon Burndred 5/26/2023	
ו	5617	Request 5617 Request for UCROFC creat		UCR	OFC Inter		In Flight Approve	18	0	á		ennifer Douglas	JD Jennifer Douglas	

- d. Click on the 'Request ID' hyperlink in blue to take you into the request for more details.
- e. Recall an In-Flight request.
 - i. Click on the hyperlink of the Request ID.
 - ii. Click on actions then recall.
 - iii. Make the changes needed and submit it again for approvals.

∷ ∢	Ree	quest 561	17		:	UC	ROFC - Reques	t 5617						Actions • Dove
∇	In F	light		In	teractive									
lq	Requ	uest for UCP	ROFC create	ed by Jennifer Do	uglas.		Account UCOP V1	ACTIVITY V1	FUND V1	Flex 1 V1	Flex2 V1	Account List (Do Not Change)	Activity List (D	Vect Vi Recall 👻 🗾
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1. Log into the system.

This will be in rSpace once we go live. Until then, use the below link.

a. EMP Oracle Cloud -

https://edm-test-ucriverside.epm.us-phoenix-1.ocs.oraclecloud.com/epm/

b. Click on Shibboleth_QA.

Cloud Infrastructure	
ORACLE Cloud	
ucriverside	
Oracle Cloud Account Sign In	
Identity domain ① OracleIdentityCloudService	
User Name	
User name or email	
Password	
Password	
Forgot Password?	
Sign In	
Or sign in with	
Shibboleth_QA	
Need help signing in?	

c. Login with NetID and password and authenticate via the UCR system.

UC RIVERSIDE
UCR NetID:
Password:
SIGN IN
Forgot your password?
Learn about MFA
Need help?

2. Requesting a name change to an Activity/Department/Division/ORG Node:

a. Go to 'Views.'



b. Then 'UCROFC.'

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Views													
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88	Account Split A Account View for		'M (Do Not Use Fo	r Changes or New	Requests)			JV Jesus Villavicencio 9/8/2022 SB Shannon Burndred 4/11/2023					
88	Activity Split V Activity View for		M (Do Not Use For	Changes or New	Requests)								
88	Flex1 Split View Flex1 View for GL		(Do Not Use For Ch	nanges or New Re	quests)		JV Jesus Villavicencio 9/8/2022 SB Shannon Burndred 4/11/2023						
88	Flex2 Split View Flex2 View for GL		(Do Not Use For C	hanges or New Re	quests)			JV Jesus Villavio 9/8/2022	encio	SB Shannon B 4/11/2023	urndred		
88	Fund Split View		(Do Not Use For Cl	hanges or New Re	quests)			JV Jesus Villavio 9/8/2022	encio	SB Shannon B 4/11/2023	urndred		
88	UCREPM (Do UCREPM Default		Changes or New R	lequests)				JV Jesus Villavio 8/23/2022	encio	SB Shannon B 4/11/2023	urndred		
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c. Select 'ACTIVITY| V1.'

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₽ 72	UCROFC Natural Account VI Q < > 🛃	Account UCOP V1 ACTIVITY V1 : FUND V1 Flex 1 V1 Flex 2 V1	
Bă	I ✓ Name → Di TOTACT	Description US Total Activity	

d. Click on 'Total Activity >' to expand the tree.

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	UCROFC					
R R	Natural Account V1	Account UCOP V1	ACTIVITY V1	FUND V1	Flex 1 V1	Flex2 V1
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86	I 🗸 Name				Description US	
	► D TOTACT	>		:	Total Activity	

e. There are two ways to find the node you are looking for; you can continue to expand the tree until you find the activity node you would like to impact.

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86	I 🗸 Name	Description US	
	- CI TOTACT	Total Activity	
	→ D ORGI0	School of Education	
	□ DIV100 □	School of Education General	
	→ D01000	SOE Deans Office Dept	
	00010A 🌣 🖌	SOE Deans Office	

OR you can do a search.

≡ [IC RIVERSIDE	Enterprise Data Management C	Cloud				
Ħ	UCROFC						
て <u>(</u> 国	Natural Account I VI Q A01000	Account UCOP V1	ACTIVITY V1 :	FUND V1	Flex 1 V1	Flex2 V1	
Вź	I V Name			Description US			
	D TOTACT		:	Total Activity			

f. Once you have selected the desired Activity/Dept/Div/ORG, click on 'New Request.'

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10 27 11	UCROFC Natural Account [14]	Account UCOP VI	ACTIMITY VI - }	FUND V1	Flex 1] V1	Fies2 VI	Account List [Do Not Change] A01000	Activity List (D	New Request Close Select Versport
85	 Activity 	I V Name			Description US Tatal Activity		Properties Locations	History	
	A01000 D01000	+D ORGO			School of Education		٩		15 Properties
		Crovico vicio por			School of Education General SOE Deans Office Dept		Name		A01000
			01000	1	SOE Dears Office		Shart Date End Date		

g. Once you click on a new request, a request number will show up on the top left of the page. Please note that you can include multiple changes within one request. You simply make all the desired changes before finalizing or submitting your request; however, for purposes of this guide we will assume each example is a separate request.

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	Request 5 Draft			: nteractive	UCROFC Reques	t 5835	
Ľ.	Request for U	CROFC create	py Susana Si	lazar.	Natural Account V1 Q A01000 V ×	Account UCOP V1	ACTIVITY V1 :
	0 All Items	0	0	•	 Activity A01000 D01000 	I ✓ Name ✓ D TOTACT ✓ D ORGIO	

h. Once a request is open, a 'Properties Table' will open to the right of the screen with editable fields that are shown in blue font. Here you can change the name of the node by simply updating the 'Description US' field, no other fields should be changed ('Description US' should be no more than 30 characters long). Please note, however, that no special characters may be used in the name except for a colon ':' or an ampersand '@'. All other characters will cause an error message.

Flex2 V1 Account L A01000	Submit Actions Done Select Viewpoint Activity
Properties Locations History	
Q	15 Properties
Name	A01000
Start Date	
End Date	
Summary	No
Enabled	Yes
Allow Posting	Yes
Allow Budgeting	Yes
 Description US 	SOE Deans Office
Level	5
Parent	D01000
Description	
UC_DEPARTMENT_TYPE	General Campus - Other 510 - Education
UC_PRIMARY_ACTIVITY	DiU - Education
Tree Label	
THE LEVEL	

i. Once the name change has been entered, you then select the 'Submit' button and the request is complete.

lex2 V1 Account L A01000	Submit ctions Done Select Viewpoint Activity					
Properties Locations History						
Q	15 Properties					
* Name	A01000					
Start Date						
End Date						
Summary	No					
Enabled	Yes					
Allow Posting	Yes					
Allow Budgeting	Yes					
 Description US 	SOE DeansOffice					
Level	5					
Parent	D01000					
Description						
UC_DEPARTMENT_TYPE	General Campus - Other					
UC_NSF_CODE	510 - Education					
UC_PRIMARY_ACTIVITY						
Tree Label						

j. Lastly, the same process as above would be used when inactivating an activity tree node, we request only that you change the name of the node to have a prefix of INACTIVE in all caps at the beginning of the Description US to signal you want to inactivate a node.

3. Requesting to move an Activity/Department/Division Node:

Follow the same Steps as 2a through 2g as noted above to open a new request for your selected node.

k. Hover over the node name you want to move, and an arrow quad will appear over the node code (we are displaying a larger arrow quad and slightly to the right below for illustration purposes only).

UCROFC - Request 5836 Natural Account | V1 Account UCOP | V1 ACTIVITY | V1 FUND | V1 Flex 1 | V1 Q < > 4. Name Description US D TOTACT Total Activity - DLORGIO School of Education - CI DIV100 School of Education General - CI D01000 SOE Deans Office Dept A01000 SOE Deans Office © A01494 SOE Development Office O A01528 SOE E&A and ICR Eurods O A02521 SOE Deans Unallocated - DIV224 School of Education Acade Instruction & Prog Support D01001 D02090 SOE Faculty Initiatives

- l. Once you see that arrow quad that means you can click and drag the node wherever you want to move it.
 - i. If you are moving an activity from one department to another, then you must ensure that the department you are moving the node to is visible in the tree and the same goes for all other levels, so that you are able to drag the node to it.
 - ii. You must always drag/move your node to the parent level so that it is displayed in numerical order under that parent. In other words, an activity should be dragged to a department, a department should be dragged to a division and a division should be dragged to an organization.
 - iii. If you move a department or division node all child nodes under that department or division will be moved as well.
 - iv. Add Description. As part of moving a department via a re-organization, we need to provide UCPath the department default FAU (Activity/Function) and the department location code if they are changing.
 - All default FAUs use fund 69993. All existing departments have a current default FAU, it can be found at: https://0365ucr.sharepoint.com/:f:/s/BFS/BSA/EkhOfJX_s19EhSy1_tvy MNYBJhFHGb3v51ApAUmnKdS9xw?e=9F4GW7. In the near future, after the OCF go-live, a Default Funding Report will be added to iReport for the departments to access, to replace the SharePoint link shown above. We ask units who are moving departments to check this list and confirm if the default FAU is still correct or if it needs to be updated. If no change is required then in the Description node you will add "No Change to DFAU".
 - A similar process must be done for location code. If a department exists and is being reorganized, we need the unit to review the existing location code and confirm if it is still valid or if it requires a change. Units can use this job aid that shows the FMS steps to find the building and room numbers:

https://ucpath.ucr.edu/sites/default/files/2022-03/LocatingWorkstatio n.pdf and Units can use the following spreadsheet to help them convert the building and room numbers to the actual location code for UCPath since the specific format for the codes is not in FMS: https://ucpath.ucr.edu/document/location-data-lookup-spreadsheet. If no change is required for the location code, in the Description Node you will add "No change to location".

• So as part of this step, we are asking the units to enter into the "Description Field, the updated Default FAU (Activity/Function), and location code. Please use the following format as an example

"A01000/40 and 4034018" if a change is required, if no change is required, then use the following format as an example "No change to DFAU or Location"

m. Always click 'Submit' to finalize your request.

4. Requesting to add an Activity/Department/Division Node:

Follow the same Steps as 2a through 2g as noted above to open a new request for your selected org.

n. To add an activity, click on the 3 horizontal dots next to the department code and then click add Child. Or click on the 3 horizontal dots next to the last activity code for that department code and then click add Sibling.



o. The screen will then show a node that is defaulted to New Activity, and the properties window will become editable.

atural Account V1 Account UCOP V1	ACTIVITY V1 E FUND V1 Flex 1 V	1 Flex2 V1 Account L	Select Viewpoint
ゲイン 平		 Vewpoint 'ACTIVITY VT is configured to allow only upper case characters, but node "New Activity" contains 	
Name Name	Description US	lower case characters.	
- CI TOTACT	Total Activity	Node with name "New Activity" in viewpoint "ACTIVITY"	
■ C1 ORG10	School of Education	VT is longer than the configured maximum length of 2.	15 Properties
→ C1 DIV100	School of Education General	/ + Name	New Activity
- Ca bersoo	SOE Deans Office Dept	Start Date	
© A01000	SDE Deans Office	End Date	
0_A01494	SOE Development Office	Summary	No
○ A01528	SOE F&A and ICR Funds	Enabled	Yes
0.003521	SOE Deans Unallocated	Allow Posting	Yes
New Activity	1	Allow Budgeting	Ves
 C) DIV224 	School of Education Academic	 Description U5 	
CI ORGII	Bowns College of Engineering	Level	5
C) ORG12	College of Humanities Arts & Social Sciences	Parent	DOIDOD
C1 ORG18	School of Business	Description	
D ORGM	College of Natural & Agricultural Sciences	UC_DEPARTMENT_TYPE	
2 Messages for this node are listed below:		UC_NSF_CODE	
	r case characters, but node 'New Activity' contains lower case characters.		
Node with name 'New Activity' in viewpoint 'ACTIVITY V	I is longer than the configured maximum length of 7.	UC_PRIMARY_ACTIVITY	

- p. You will notice an error message will appear stating that the node name can only include upper case characters and the character limit is 7. This is because you must edit in the properties sections the node Name.
 - i. Delete 'New Activity' and enter any 6-character name with uppercase letters and/or numbers combination.
 - The budget office will determine what the final new node name or activity number should be, but the system requires that you enter a unique one for now (be creative as it will be overwritten anyway).
 - If the node you entered already exists, the system will provide a new error message. The only two things that must be done on this screen are:
 - a. Add new node name (6 uppercase or numerical characters)
 - b. Add Description US (no more than 30 characters long)
 - Other flags and fields in the property table will be automatically defaulted and left as is.
 - Leave the Summary flag as a 'No,'
 - Leave the Enabled Flag, Allow Posting Flag, and Allow Budget Flag as 'Yes.'
 - The level for an Activity should always be a number 5 and the department parent will default based on where you created it. Nothing else is required.
- q. To add a department, the same rule applies, you click on the 3 horizontal dots next to the Division code and then click 'Add Child.' Or click on the 3 horizontal dots next to the last Department code for that Division code and then click 'Add Sibling.'

-					Add Sibling	
Request 5836 Draft		1 teractive	UCROFC - Request 5836		Add Sibing Copy	
Request for UCROPC creat	ted by Susana Sal	NDM.	Natural Account VI Account UCOP VI		Model After 🕨	UND VI Flex 1 VI
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2 5 0 0		0	I 🗸 Name		Move Here	
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New Activity			 Dr origin 		Remove	ngineering
New Activity			D 08012		Delete	les Arts & Social Sciences
1 New Activity						
			→ D 01/109	-	School of Busines	
			 D D0/019 		BUS Infrast Admir	
			► C1 01/228		School of Busines	
			 D 08614 			I & Agricultural Sciences
			 D 0805 		University Extensi	
			 D ORGI6 		University Library	
			D 085/8		Academic Senate	
			El ORGIP		Auxiliary Services	
			D 08620		Chancellor	

r. The screen will then show a node that is defaulted to 'New Activity,' and the properties window will become editable.

atural Account VI Account UCOP VI	ACTIVITY VI FUND VI Flex 1 VI	 Viewpoint "ACTIVITY VT is configured to allow only upper case characters, but node "New Activity" contains lower case characters. 	Select Viewpoint
V Name	Description US	A node with the name 'New Activity' already exists in node type 'Activity'.	
D TOTACT D ORGID	Total Activity School of Education	Node with name 'New Activity' in viewpoint 'ACTIVITY' VT is longer than the configured maximum length of 7.	15 Properties
D orgit	Bourns College of Engineering	/ * Name	New Activity
- D 0R612	College of Humanities Arts & Social Sciences	Start Date	
- C DI/104	OHASS General Administration	End Date	
D 001008	CHASS Deans Office Dept	Summary	No
► C0 001009	OHASS Deans Unallocated Res	Enabled	Yes
C) C01010	OIASS Student Affairs	Allow Posting	Yes
Processo	CHASS Facilities MGMT Dept	 Alkew Budgeting 	Ves
New Activity	1	Description US	
D Dimos	OHASS Centers Programs & Other	Level	4
D DIVIOS	Humanities	Parent	01/104
 C) DIV107 	Social Sciences	Description	
D DIVIOS	Acts	UC_DEPARTMENT_TYPE	
Messages for this node are listed below:		UC_NSF_CODE	
Viewpoint 'ACTIVITY VI' is configured to allow only upp	per case characters, but node 'New Activity' contains lower case characters.	UC_PRIMARY_ACTIVITY	

- f. You will notice an error message stating that the node name can only include upper case characters and the character limit is 7. This is because you must edit in the properties sections the node Name.
 - i. Delete 'New Activity' and enter any 6-character name with uppercase letters and/or numbers combination.
 - 1. The budget office will determine what the final new node name or activity number should be, but the system requires that you enter a unique one for now (be creative as it will be overwritten anyway).
 - 2. If the node you entered already exists, the system will provide a new error message. The only things that must be done on this screen are:
 - a. Add new node name (6 uppercase or numerical characters)
 - b. Add Description US (no more than 30 characters long)
 - c. For the description, as part of creating a new department, we need to provide UCPath the department default FAU (Activity/Function) and the department location code. All default FAUs use fund 69993. We ask units creating a new department to provide the activity and function they would like to set up as the default FAU.

All existing departments have a current default FAU, it can be

found at:

https://o365ucr.sharepoint.com/:f:/s/BFS/BSA/EkhOfJX_s19EhSy1_ tyyMNYBJhFHGb3v51ApAUmnKdSoxw?e=9F4GW7 . In the near future, after the OCF go-live, a Default Funding Report will be added to iReport for the departments to access, to replace the SharePoint link shown above.

- A similar process must be done for location code. Units will need to provide the location code for all newly created departments. Units can use this job aid that shows the FMS steps to find the building and room numbers: https://ucpath.ucr.edu/sites/default/files/2022-03/Locatingworkstation.pdf and Units can use the following spreadsheet to help them convert the building and room numbers to the actual location code for UCPath since the specific format for the codes is not in FMS: https://ucpath.ucr.edu/document/location-data-lookup-spreadsheet.
- So as part of this step, we are asking the units to enter into the "Description" Field, the new Default FAU (Activity/Function), and location code. Please use the following format as an example "A01000/40 DFAU and 4034018 Loc"
- d. Change Summary Flag to Yes
- e. Change Allow Posting Flag to No
- f. Change Allow Budgeting Flag to No
- g. Tree Label Select Parent 1 from Drop Down menu
- ii. Other flags and fields in the property table will be automatically defaulted.
 - 1. The 'Summary Flag' will default to 'No' but it must be changed to YES for anything other than activities
 - 2. The 'Enabled Flag' must stay as a Yes
 - 3. The 'Allow Posting Flag' and Allow Budget Flag must be switched to No
 - 4. The level for a 'Department' should always be a number 4
 - 5. The 'Division' parent will default based on where you created it
- i. You'll notice that by changing the 'Summary Flag' to YES, the system will generate a new error. It will tell you that a Summary Flag has been enabled but the node has no children.

- Every department/division/org requires a node with a posting level activity (summary flag No)
- When creating new parent nodes you will either have to create a new child under that node or move one from another node
- For new departments, you will either create a new activity under this new department or move an existing activity into this new department to resolve this error and be able to submit your request

UCROFC - Request 5836	ACTIV	TY VI ; FUND VI Flex 1 VI	F	Flex2 V1 Account L	Submit Actions Done Select Viewpoint
Q () Ł		+		D09999	Activity
I 🗸 Name		Description US		Properties Locations History	
Caltoract Calcoration		Total Activity School of Education		٩	15 Properties
D ORGH		Bourns College of Engineering		/ * Name	000000
□ 0RG12		College of Humanities Arts & Social Sciences		Start Date	
□ DIV104		CH455 General Administration		End Date	\sim
C Dotoes		CHASS Deans Office Dept		Summary	(₁₁₁)
▶ 🗅 D01009		CH455 Deans Unallocated Res		Enabled	Nex
► D01010		CHASS Student Affairs		Allow Posting	No
D Dorpea		CHASS Facilities MGMT Dept	,	Allow Budgeting	No
1 © D09999	1	TEST DEPARTMENT		 Description US 	TEST DEPARTMENT
Di Diretto		CHASS Centers Programs & Other		Level	4
D DIV105		Humanities		Pwert	DfV104
C1 DIV107		Social Sciences		Description	
DIVID8		Arts		UC_DEPARTMENT_TYPE	
1 Message for this node is listed below:				UC_NSF_CODE	
Node with name 'D09999' in viewpoint 'ACTIVITY VI' has 'Sur-	mary Flag's	mabled but has no children.		UC_FRIMARY_ACTIVITY	

s. To add a division, the same rule applies. Click on the 3 horizontal dots next to the 'Org' code and then click 'Add Child' or click on the 3 horizontal dots next to the last Division code for that Org and then click 'Add Sibling.'

nagement Cloud	<	Add Child
UCROFC - Request 5836		Add Sibling
Natural Account V1 Account UCOP V1	,	Copy UND V1 Flex 1 V1
< < > 국 		Model After 🕨 _
I 🗸 Name		Insert Here
→ TOTACT		Move Here
▶ 🗅 ORG10		Reorder
▶ □ ORG11		ngineering
▶ □ ORG12		Remove les Arts & Social Sciences
D ORG13		Delete
▶ □ ORG14		a Agricultural Sciences
		University Extension
C1 DIV118		Academic Affairs
DIV119		Outreach & Engagement Division
DIV120		UNEX Strategic Operations
DIV122		UNEX Other
DIV213		Citrus Shared Services Division
▶ 🗅 ORG16		University Library
▶ □ ORG18		Academic Senate
▶ □ ORG19		Auxiliary Services
▶ □ ORG20		Chancellor

t. The screen will then show a node that is defaulted to 'New Activity,' and the properties window will become editable.

atural Account V1 Account UCOP V 、 〈 〉 上	1 ACTIVITY V1 : FUND V1 Flex 1 V1	A node with the name 'New Activity' already exists in node type 'Activity' Node with name 'New Activity' in viewpoint 'ACTIVITY	Select Viewpoint		
✓ Name	Description US	VI' is longer than the configured maximum length of 7.			
	Total Activity School of Education	Viewpoint 'ACTIVITY VI' is configured to allow only upper case characters, but node 'New Activity' contains lower case characters.	15 Prop		
▶ 🗅 ORG11	Bourns College of Engineering	🖉 * Name	New Activity		
▶ 🗅 ORG12	College of Humanities Arts & Social Sciences	Start Date			
▶ □ ORG13	School of Business	End Date			
▶ 🗅 ORG14	College of Natural & Agricultural Sciences	Summary	No		
	University Extension	Enabled	Yes		
DIV118	Academic Affairs	Allow Posting	Yes		
DIV119	Outreach & Engagement Division	Allow Budgeting	Yes		
► Ci DIV120	UNEX Strategic Operations	* Description US			
DIV122	UNEX Other	Level	3		
DIV213	Citrus Shared Services Division	Parent	ORG15		
	:	Description			
▶ 🗅 ORG16	University Library	UC_DEPARTMENT_TYPE			
lessages for this node are listed below:		UC_NSF_CODE			
A node with the name 'New Activity' already exists in no	ode type 'Activity'.	UC PRIMARY ACTIVITY			

- i. You will notice an error message stating that the node name can only include upper case characters and the character limit is 7. This is because you must edit the node Name in the properties sections. Delete 'New Activity' and enter any 6-character name with uppercase letters and/or numbers combination. The budget office will determine what the final new node name or Division number should be but the system requires that you enter a unique one for now (be creative as it will be overwritten anyway). If the node you entered already exists, the system will provide a new error message. The only things that must be done on this screen are:
 - 1. Add a new node name (6 uppercase or numerical characters)
 - 2. Add Description US (no more than 30 characters long)
 - 3. Change Summary Flag to Yes
 - 4. Change Allow Posting Flag to No
 - 5. Change Allow Budgeting Flag to No
 - 6. Tree Label Select Parent 2 from Drop Down menu
- i. Other flags and fields in the property table will be automatically defaulted.
 - a) The 'Summary Flag' will default to No but it must be changed to YES for anything other than activities
 - b) The 'Enabled Flag' must stay as a Yes
 - c) The 'Allow Posting Flag' and 'Allow Budget Flag' must be switched to No
 - d) The level for a Division should always be a number 3
 - e) The Org parent will default based on where you created it
- u. Like Division, you'll notice that by changing the summary flag to YES, the system will generate a new error. It will tell you that a Summary Flag has been enabled but

the node has no children. Every department/division/org requires a node with a posting level activity (summary flag No). When creating new parent nodes, you will either create a new child under that node or move one from another node. For new Divisions, you will either create a new Department and new Activity under this new Division or move an existing Department into this new Division to resolve this error and be able to submit your request.

5. Request Created in Error

- v. 1st way
 - i. Click on the activity/dept/div code.
 - ii. Click on the 3 dots.
 - iii. Click on delete.



- w. 2nd way
 - i. Click on the Request Number.
 - ii. Click on the 3 dots.
 - iii. Click on delete.



6. Reviewing a request

- x. Use the home button on the top right of the screen next to your name.
- y. Click on request.

= UC RIVERSIDE	Enterprise Data Management Cloud							🛆 Jennifer Douglas 🔻
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	JD	Views	Requests	Applications	Node Types	000	O O Node Sets	
	Introduction Activity	Properties	Lookup Sets	Connections	Reports	☐ Audit	Academy	

z. This will show you all the requests you have created and the status.

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		Views	Requests	Applications	ې Node Types	Hierarchy Sets	000 Node Sets	Properties	} □ □ < Lookup Sets	·©- Connections	Reports	☐ Audit	☐ Academy	
equ	est Activity													Delete Requests
leques II	t ID	View All	Request Type All	Status All		Stage All	Owner All		My Activity	Time Frame Last 30 Days				
a d	<u>k</u> +													III 🔻 35 Reque
	Request ID	Title and Description		Viev	v Requ	iest Type	Status and Stage	Items	Request Issues	Age (In Days)	Owner		Modified	Actions
	5641	Request 5641 Request for UCROFC create	ed by Jennifer Douglas.	UCR	OFC Inter		Draft Submit	3	0	0		nnifer Douglas signed	JD Jennifer Douglas 5/30/2023	
	5628	Request 5628 Request for UCROFC create	ed by Jennifer Douglas.	UCR	OFC Inter		Completed Closed	1	0	0		nnifer Douglas ^{bmitted}	SB Shannon Burndred	

- aa. Click on the Request ID hyperlink in blue to take you to the request for more details.
- bb. Recall an In-Flight request.
 - i. Click on the hyperlink of the Request ID.
 - ii. Click on actions then recall.
 - iii. Make the changes needed and submit it again for approval.

	Request 5617 E UCROFC - Request 5617											Actions • Dove			
K		In Flight		Int	eractive										
	Request for UCROFC created by Jennifer Douglas.				uglas.		Account UCOP V1	ACTIVITY V1	FUND V1	Flex 1 V1	:	Flex2 V1	Account List (Do Not Change)	Activity List (D	Lect Vi Recall 👻 🔟
		-											D01039BGS0		Elevi
		B	! 🖾 🛛	0	Q			FIEX							