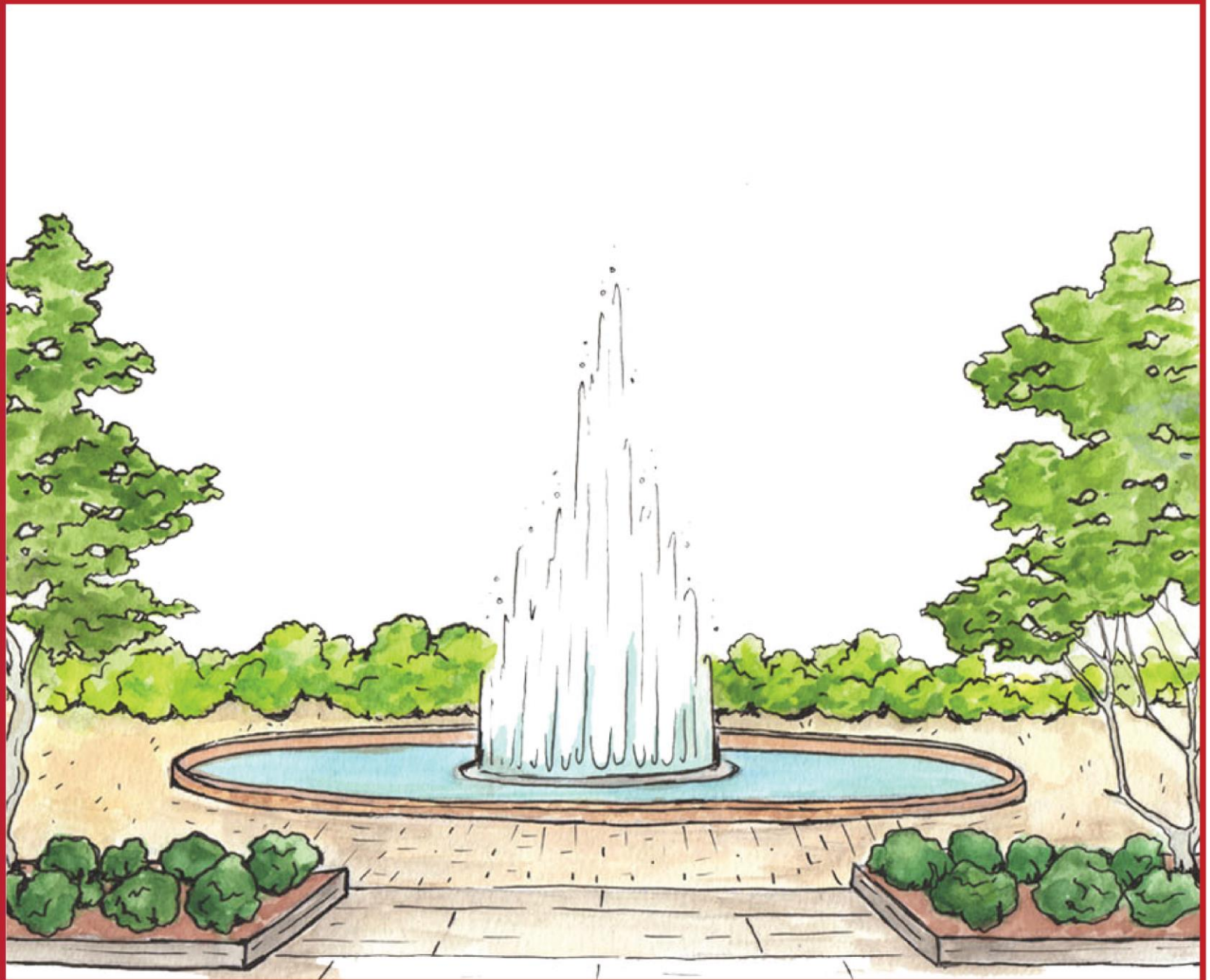


Department Maintenance and Tree Structure



Commitment Management
Finance & Administration
UNIVERSITY OF GEORGIA





Maintaining Departments



Maintaining Departments

- Use a Chartfield Request to Add or change a department.
- Chartfield Request is also used to Add a Class, Chartfield1 or Operating Unit.
- Departments can't be deleted, but can be made Inactive.
- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request



Chartfield Request - Departments

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request

ORACLE®

All ▾ Search >> Advanced Search 🔍 Last Search Results

ChartField Request

Request ID

SetID 🔍

Field Name 🔍

Field Action ▾

Field Value 🔍

- The Find Existing/Add New options refer to the REQUEST for the chartfield addition or change. A new Change Request must be created through “Add a New Value” to modify an existing department.
- Once the Chartfield Request is Created but before it is Approved or Denied, it can be modified by using the “Find an Existing Value”



Chartfield Request - Departments

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request

ORACLE®

All ▾ Search >> Advanced Search 🔍 Last Search Results

ChartField Request

Find an Existing Value

Add a New Value

Request ID NEXT

SetID 18000 🔍



Always use SetID 18000

Field Name 🔍

Field Action Add ▾

Field Value 🔍

Add

[Find an Existing Value](#) | [Add a New Value](#)



Chartfield Request - Departments

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request

ORACLE® All ▾ Search >> Advanced Search

ChartField Request

Find an Existing Value

Add a New Value

Request ID NEXT

SetID 18000 🔍

Field Name DEPTID 🔍

Field Action Add ▾

Field Value 253123SYP 🔍

Add

[Find an Existing Value](#) | [Add a New Value](#)

Select DEPTID



Chartfield Request - Departments

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request

ORACLE® All ▾ Search >> Advanced Search

ChartField Request

[Find an Existing Value](#) [Add a New Value](#)

Request ID

SetID 🔍

Field Name 🔍

Field Action ▾

Field Value 🔍

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Specify Add or Update



Chartfield Request - Departments

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request

ORACLE® All ▾ Search >> Advanced Search

ChartField Request

[Find an Existing Value](#) [Add a New Value](#)

Request ID

SetID 🔍

Field Name 🔍

Field Action ▾

Field Value 🔍

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

- For Field Action Add –Enter a NEW Department ID
- For Field Action Update – Enter an Existing Department ID



Chartfield Request - Departments

Department Numbering Rules

- Departments are 8 characters long
- First two digits must be your Major Unit.
- Only the last three characters may be Alpha – the rest must be numeric



**What's my
"Major Unit"?**



Chartfield Request - Departments

What's My Major Unit?

[Chart of Accounts Code Structure](#)

Found in the OneSource Training Library > Quick Reference Materials
for Practitioners > OneSource – General/Cross-System OR UGA
Financial Management System



University of Georgia Chart of Account Code Structure 9.29.2021				
This document does not include all possible chartfield combinations. Please contact OneSource Service Desk if you have any questions about any chartfield combinations.				
Resident Instruction (10)				
Fund Group	Class	Program	Department	Account
10500 Tuition	11800 Tuition 11805 RIAS 119xx (According to Semester)	Instruction 11100 General Academic 11110 Instruction Cost Sharing 11111 Summer School Instruction 11114 Instruction - Over Salary Cap 11140 Instruction Departmental Admin 11200 Instruction- Vocational/Tech 11300 Instruction - Community Education 11400 Instruction - Preparatory/Remedial 11700 Teaching/Supervising in Clinic 11900 Instruction - IT Research 12100 Research Individual or Project 12110 Research Cost Sharing 12114 Research - Over Salary Cap 12200 Research Institutes and Centers 12212 Indirect Research - Start Up 12220 Cost Sharing-Inst & Resch Ctr 12400 Departmental Research 12500 Service Centers 12900 Research IT Public Service 13100 PS - Community Serv 13110 PS - Cost Sharing 13114 PS - Over Salary Cap 13200 Cooperative Extension Services 13210 Coop Extension Cost Share 13300 PS - Broadcasting Services 13500 PS - Service Centers 13900 PS - IT Academic Support 14100 AS - Libraries 14200 AS - Museums and Galleries 14300 AS - Educational Media Serv 14400 AS - Computing 14500 AS - Ancillary 14600 AS - Administration 14700 AS - Personnel Development 14800 AS - Course-Curriculum Dev Student Services 15300 SS - Administration	10XXXXXX Office of President 14XXXXXX SR VP for Acad Aff & Provost 15XXXXXX Libraries 16XXXXXX EITS 17XXXXXX College of Ag & Environ Sci 19XXXXXX College of Arts and Sciences 20XXXXXX Terry College of Business 21XXXXXX College of Education 22XXXXXX College of Engineering 23XXXXXX College of Env & Design 24XXXXXX College of Family & Consumer Sci 25XXXXXX Warnell School of Forestry and Natural Resources 26XXXXXX Odum School of Ecology 27XXXXXX Graduate School 28XXXXXX College of Journalism & Mass Communications 29XXXXXX School of Law 30XXXXXX College of Pharmacy 31XXXXXX College of Public Health 32XXXXXX School of Public & International Affairs 33XXXXXX School of Social Work 34XXXXXX College of Veterinary Medicine 41XXXXXX AU/UGA Medical Partnership 42XXXXXX VP for Instruction 43XXXXXX VP for Research 51XXXXXX VP Public Service & Outreach 57XXXXXX VP for Student Affairs 60XXXXXX VP for Finance and Administration 61XXXXXX Finance Division 62XXXXXX University Budget Division 63XXXXXX Human Resources Division 64XXXXXX Facilities Planning 65XXXXXX Environmental Safety 66XXXXXX Police Department 67XXXXXX Emergency Preparedness 68XXXXXX Facilities Management 69XXXXXX Auxiliary Services Division 71XXXXXX VP for Dev & Alumni Relations 72XXXXXX VP Marketing & Communications 73XXXXXX VP Government Relations 74XXXXXX Institutional	Revenue 4XXXXXX Expenditures 5XXXXX - Personal Services 6XXXXX - Travel 7XXXXX - Operating 8XXXXX - Equipment 8XXXXX - Equipment



Chartfield Request – What’s my “Major Unit”?

Chart of Accounts Code Structure

Department	
10XXXXXX Office of President	33XXXXXX School of Social Work
14XXXXXX SR VP for Acad Aff & Provost	34XXXXXX College of Veterinary Medicine
15XXXXXX Libraries	41XXXXXX AU/UGA Medical Partnership
16XXXXXX EITS	42XXXXXX VP for Instruction
17XXXXXX College of Ag & Environ Sci	43XXXXXX VP for Research
19XXXXXX College of Arts and Sciences	51XXXXXX VP Public Service & Outreach
20XXXXXX Terry College of Business	57XXXXXX VP for Student Affairs
21XXXXXX College of Education	60XXXXXX VP for Finance and Administration
22XXXXXX College of Engineering	61XXXXXX Finance Division
23XXXXXX College of Env & Design	62XXXXXX University Budget Division
24XXXXXX College of Family & Consumer Sci	63XXXXXX Human Resources Division
25XXXXXX Warnell School of Forestry and Natural Resources	64XXXXXX Facilities Planning
26XXXXXX Odum School of Ecology	65XXXXXX Environmental Safety
27XXXXXX Graduate School	66XXXXXX Police Department
28XXXXXX College of Journalism & Mass Communications	67XXXXXX Emergency Preparedness
29XXXXXX School of Law	68XXXXXX Facilities Management
30XXXXXX College of Pharmacy	69XXXXXX Auxiliary Services Division
31XXXXXX College of Public Health	71XXXXXX VP for Dev & Alumni Relations
32XXXXXX School of Public & International Affairs	72XXXXXX VP Marketing & Communications
	73XXXXXX VP Government Relations
	74XXXXXX Institutional



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone

SetID 18000
Field Name DEPTID
Field Value 25312SYP
Email ID test.dsalum@uga.edu

Core Information

☐ Budgetary Only

*Effective Date 10/27/2021

*Status Active

Company

Manager ID

*Description

Manager Name

*Short Description

Long Description

Attributes

Business Justification

Attachments (0)



Chartfield Request - Departments

Core Information

☐ Budgetary Only



Budgetary Only?

- If marked, the Department will only be able to accept Budget Transactions.
- Control Only (C) and Upper Level Reporting (UL) departments should be marked Budgetary Only.



Chartfield Request - Departments

Core Information

☐ Budgetary Only

*Effective Date

10/27/2021



Effective Date

Action	Consideration	Effective Date
Add	Use for BPSS* for upcoming FY	3/1 prior to 7/1 of upcoming FY (i.e. 3/1/2023 for FY2024)
Add	Not for use in BPSS*	7/1 of Fiscal Year
Change	Changing Budgetary Control	7/1 of upcoming FY
Change	Not Changing Budgetary Control	No earlier than 7/1 of current FY
Inactivate	n/a	Current Date

*BPSS; Budget Planning and Salary Setting



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone

SetID 18000
Field Name DEPTID
Field Value 25312SYP
Email ID test.dsalum@uga.edu

Core Information

☐ Budgetary Only
*Effective Date 07/01/2021
*Status Active
Company
Manager ID
*Description Department Description
Manager Name
*Short Description DEPT A
[Long Description](#)
[Attributes](#)

Business Justification

[Attachments \(0\)](#)

Description Required

Short Description Required



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Request ID NEXT
Request Status Newly Created
Field Action Add
Telephone

SetID 18000
Field Name DEPTID
Field Value 25312SYP
Email ID test.dsalum@uga.edu

Core Information

☐ Budgetary Only

*Effective Date 07/01/2021

*Status Active

Company

Manager ID

*Description Department Description

Manager Name

*Short Description DEPT A

[Long Description](#)

[Attributes](#)

Business Justification

[Attachments \(0\)](#)

SAVE







Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Request ID	0000013420	 Request ID is Assigned	Copy
Request Status	Newly Created		
Field Action	Add	Field Name	DEPTID
Telephone	<input type="text"/>	Field Value	<input type="text" value="25312SYP"/>
		Email ID	<input type="text" value="test.dsalum@uga.edu"/>

Core Information

	<input type="checkbox"/> Budgetary Only
*Effective Date	<input type="text" value="07/01/2021"/> 
*Status	<input type="text" value="Active"/> 
Company	<input type="text"/> 
Manager ID	<input type="text"/> 
*Description	<input type="text" value="Department Description"/>
Manager Name	<input type="text"/>
*Short Description	<input type="text" value="DEPT A"/>
	Long Description
	Attributes

Business Justification

Attachments (0)



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Request ID 0000013420
Request Status Newly Created
Field Action Add
Telephone

SetID 18000 [Copy](#)
Field Name DEPTID
Field Value
Email ID

Core Information

☐ Budgetary Only
*Effective Date
*Status
Company
Manager ID
*Description
Manager Name
*Short Description

[Long Description](#)

[Attributes](#)

Business Justification

[Attachments \(0\)](#)

Select Attributes Hyperlink



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

ChartField Attributes

ChartField Attribute Values

SetID	ChartField Value	Attribute Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value
18000	25312SYP	07/01/2021	DEPTID	<input type="text"/>	<input type="text"/>

OK Cancel

Select ChartField Attribute Search



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Look Up ChartField Attribute

×

Help

*SetID

18000

Field Name

DEPTID

ChartField Attribute

begins with ▾

Search

Clear

Cancel

Basic Lookup

Search Results

View 100 |◀◀ 1-3 of 3 ▾▶▶

ChartField Attribute
CREDIT_HRS_CLS
DEPT_RPT_GRP
NSF_HERD_CODE

CREDIT_HRS_CLS
no longer used

NSF_HERD_CODE
Central Accounting Use ONLY



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Look Up ChartField Attribute

×

Help

*SetID

18000

Field Name

DEPTID

ChartField Attribute

begins with ▾

Search

Clear

Cancel

Basic Lookup

Search Results

View 100

◀◀

1-3 of 3 ▾

▶▶

ChartField Attribute
CREDIT_HRS_CLS
DEPT_RPT_GRP
NSF_HERD_CODE

Select DEPT_RPT_GRP

Controls where this department falls in the MIH (Master Institutional Hierarchy) and in the Data Warehouse MSR (Monthly Status Report) by Department Groups reports



Chartfield Request - Departments

DEPT_RPT_GRP

- Use Query UGA_GL_CF_DEPT_TBL to find the Reporting Attributes used for your unit, or for a department in the same area as the department being added.



Chartfield Request - Departments

DEPT_RPT_GRP

UGA_GL_CF_DEPT_TBL - Roster of all Departments

Dept (%Accepted) Date Last Updated >= mm/dd/yyyy Dept Grp (%Accepted-CaseSens) [View Results](#)Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)[View All](#)

First 1-2 of 2 Last

Row	SetID	DEPTID	Eff Date	Status as of Effective Date	Descr	Short Desc	Long Desc	Bud. Only	Dt Added or Last Updated	Dept Grp	Dept Grp Descr
1	18000	25002FAR	07/01/2018	Active	Warnell F&A Return 272	FR RET 272		N	06/22/2020 1:09:50PM	WARNELL-ZOTHER	Warnell - Zother
2	18000	25002RAS	07/01/2019	Active	Warnell RIAS	WarnelRIAS		N	09/06/2019 12:57:41PM	WARNELL-RIAS	Warnell - RIAS



Chartfield Request - Departments

DEPT_RPT_GRP

UGA_GL_CF_DEPT_TBL - Roster of all Departments

Dept (%Accepted) Date Last Updated >= mm/dd/yyyy Dept Grp (%Accepted-CaseSens) [View Results](#)Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)[View All](#)

First 1-2 of 2 Last

Row	SetID	DEPTID	Eff Date	Status as of Effective Date	Descr	Short Desc	Long Desc	Bud. Only	Dt Added or Last Updated	Dept Grp	Dept Grp Descr
1	18000	25002FAR	07/01/2018	Active	Warnell F&A Return 272	FR RET 272		N	06/22/2020 1:09:50PM	WARNELL-ZOTHER	Warnell - Zother
2	18000	25002RAS	07/01/2019	Active	Warnell RIAS	WarnelRIAS		N	09/06/2019 12:57:41PM	WARNELL-RIAS	Warnell - RIAS

All DEPT_RPT_GRP attributes for a unit start with a common prefix



Chartfield Request - Departments

DEPT_RPT_GRP – Prefix by Unit

Unit	Prefix	Unit	Prefix	Unit	Prefix	Unit	Prefix
10	PO	25	Warnell	41	MP	66	UGAPD
14	VPAA	26	OSE	42	OVPI	67	EP
15	LIB	27	GRAD	43	OVPR	68	FMD
16	EITS	28	GRADY	51	PSO	69	AUX
17	CAES	29	LAW	57	VPSA	70	ATH
19	AS	30	PHARM	60	VPFA	71	DAR
20	TCB	31	CPH	61	FinDiv	72	VPMC
21	COE	32	SPIA	63	HR	73	VPGR
22	CENGR	33	SSW	64	FP	74	UGA
23	CED	34	CVM	65	ES	75	FA
24	FACS						

Chartfield Request - Departments

DEPT_RPT_GRP – Prefix by Unit

Need a new Department Reporting Group Attribute?

➤ Log a OneSource ticket > “Add DEPT_RPT_GRP Attribute”

For your Department Chartfield Request:

- Wait until the Attribute is entered to complete your department chartfield request
- OR enter the Department Chartfield request with an existing attribute and later correct the Attribute with another Department Chartfield Change Request



Chartfield Request - Departments

DEPT_RPT_GRP

UGA_GL_CF_DEPT_TBL - Roster of all Departments

Dept (%Accepted) Date Last Updated >= mm/dd/yyyy Dept Grp (%Accepted-CaseSens) [View Results](#)Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File](#) (1 kb)[View All](#)

First 1-2 of 2 Last

Row	SetID	DEPTID	Eff Date	Status as of Effective Date	Descr	Short Desc	Long Desc	Bud. Only	Dt Added or Last Updated	Dept Grp	Dept Grp Descr
1	18000	25002FAR	07/01/2018	Active	Warnell F&A Return 272	FR RET 272		N	06/22/2020 1:09:50PM	WARNELL-ZOTHER	Warnell - Zother
2	18000	25002RAS	07/01/2019	Active	Warnell RIAS	WarnelRIAS		N	09/06/2019 12:57:41PM	WARNELL-RIAS	Warnell - RIAS

All DEPT_RPT_GRP attributes for a unit start with a common prefix

Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

ChartField Attributes					
ChartField Attribute Values					
<div><div></div><div></div></div>					
SetID	ChartField Value	Attribute Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value
18000	25312SYP	07/01/2021	DEPTID	DEPT_RPT_GRP <div></div>	<div>Warnell</div> <div></div>

OK

Cancel

- Enter your unit's DEPT_RPT_GRP prefix
- Select ChartField Attribute Value Search
- Select the Correct Attribute from the dropdown
- Click OK



Chartfield Request - Departments

- Soon transitioning from use of DEPT_RPT_GRP attribute to a MIH (Master Institutional Hierarchy) attribute
- Master Institutional Hierarchy combines Financial, HR, and Academic departments
- At the transition, all MIH Attributes will be set for existing departments
- The Attribute type you select will change from DEPT_RPT_GRP to MIH
- Query UGA_GL_CF_DEPT_TBL will be modified to show the MIH attribute
- Changes will be announced well ahead in the Weekly Status Call



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

 Request Comments

Questions

- Click the Expand Section Icon (Arrow to left of “Request Comments”) to open up the Comments section for your input.

▼ Request Comments

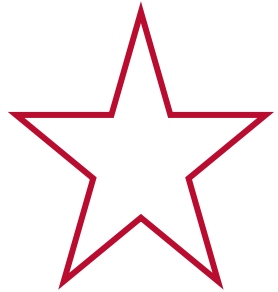
Enter Comments here



▼ Questions

Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request



Finance Department Maintenance Checklists

Found in the OneSource Training Library > Quick Reference
Materials for Practitioners > UGA Financial Management
System



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

▼ Questions

1. REQUIRED FOR UPDATE TO EXISTING DEPARTMENT: What Changes are being made? Ex. Description, Status, Budget Only Status, Department Reporting Group Attribute, Change to Parent or Budgetary Control? If changing the parent or Budgetary Control, also provide the Team Dynamix ticket number logged to vet these changes with Central Accounting.
2. REQUIRED TO UPDATE DEPARTMENT TO INACTIVE: Specify the active, transactional department (Budgetary Control Type CT or T) to which any remaining transactions or balances can be rerouted. Be sure that the required preparations specified in the Finance Department Maintenance Checklist have been completed. https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx
3. BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT: What is the parent department?
4. BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT: What is the Budgetary Control type? UL - Upper Level Reporting, C - Control Only, CT - Transactional with Control, or T-Transactional only. If adding a new Control only department, the request for at least one child Transactional should be submitted simultaneously.
5. Please ensure that all activities related to Changing or adding departments have been completed. Refer to the Department Maintenance Checklist found at https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #1:

REQUIRED FOR UPDATE TO EXISTING DEPARTMENT: What Changes are being made? Ex. Description, Status, Budget Only Status, Department Reporting Group Attribute, Change to Parent or Budgetary Control?
If changing the parent or Budgetary Control, also provide the Team Dynamix ticket number logged to vet these changes with Central Accounting.

If you are changing the Department's Budgetary Control by changing either

- 1) Parent Department (Question #3) OR
- 2) Budgetary Control Type (Question #4)

You must FIRST log a OneSource Service Ticket to discuss the intended changes with Central Accounting.

Some changes to Budgetary Control can only be done effective 7/1 of the following Fiscal year. Those changes are typically made prior to March so that the new structure can be used in Budget Planning and Salary Setting.

These situations are described in more detail in the Finance Department Maintenance Checklists



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #2:

REQUIRED TO UPDATE DEPARTMENT TO INACTIVE:

Specify the active, transactional department (Budgetary Control Type CT or T) to which any remaining transactions or balances can be rerouted. Be sure that the required preparations specified in the Finance Department Maintenance Checklist have been completed.

https://onesource.uga.edu/resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx

Before inactivating a department, you must first be sure that there are NO

- 1) Active Projects using the Department
- 2) Open POs that charge the Department
- 3) Active Combo Codes including or Positions Funded with the Department
- 4) Current Year Revenues or Expenditures using the department, except in very specific situations, ex.
 - Current Year Revenue/Expense nets to \$0
 - OR Transaction is on a Fund with NO carryforward

Refer to the Finance Departmental Maintenance Checklist for more complete information.



Chartfield Request - Departments

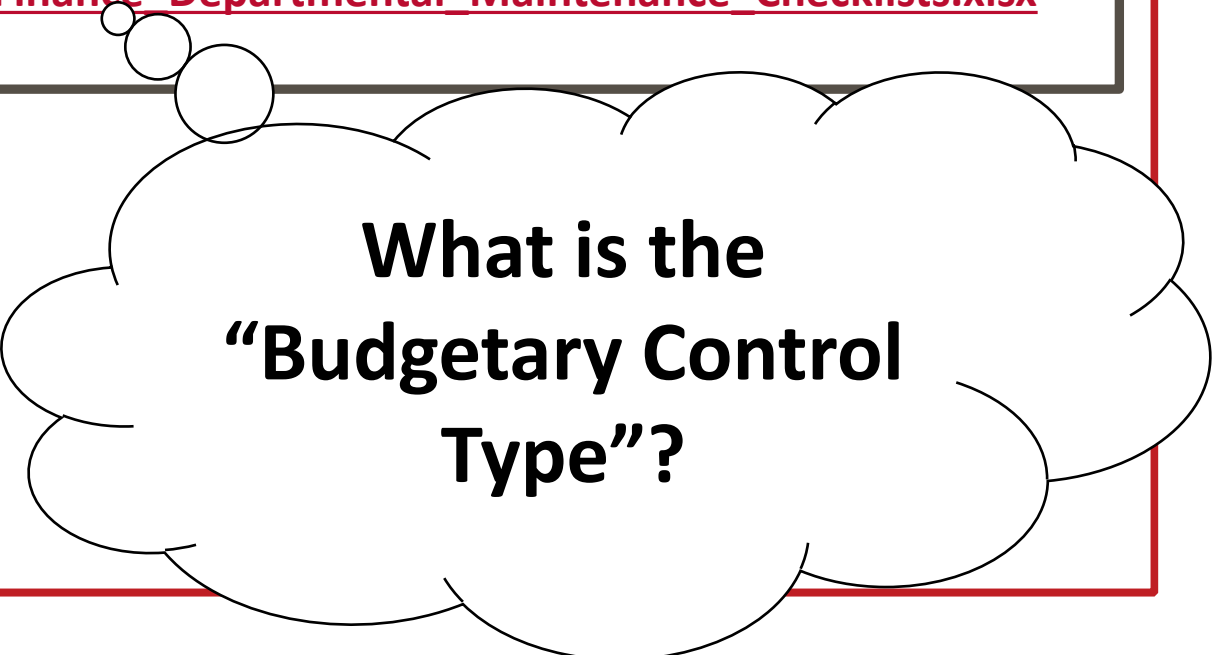
- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #2:

REQUIRED TO UPDATE DEPARTMENT TO INACTIVE:

Specify the active, **transactional department (Budgetary Control Type CT or T)** to which any remaining transactions or balances can be rerouted. Be sure that the required preparations specified in the Finance Department Maintenance Checklist have been completed.

https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx



What is the
“Budgetary Control
Type”?



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

What do we mean by “Budgetary Control”?

Budgetary Control defines the group of budgets and actual revenues, expenditures, and encumbrances we examine to determine if there is adequate available budget to cover a transaction.



Budget Check Errors Quick Reference

Found in the OneSource Training Library > Quick Reference Materials for Practitioners > UGA Financial Management System

Tells how Budgetary Control is structured for each fund and lists the queries used to determine the available budget for each.



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

The UGA Financial Management System (FMS) currently uses five types of Budgetary Control:

Control Type	Funds
Fund + Budget Reference + Department Control Group	10000-11390 11600-16000 20400
Fund + Budget Reference + Class	20200, 20300, 20500
Fund + Budget Reference	11500-11510 50000, 50100
Project	20000, 213xx, 50200, 50300
No Control	20100, 30000-42000



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

The UGA Financial Management System (FMS) currently uses five types of Budgetary Control:

Control Type	Funds
Fund + Budget Reference + Department Control Group	10000-11390 11600-16000 20400
Fund + Budget Reference + Class	20200, 20300, 20500
Fund + Budget Reference	11500-11510 50000, 50100
Project	20000, 213xx, 50200, 50300
No Control	20100, 30000-42000

What is a
“Department Control
Group”?



Chartfield Request - Departments

What is a Departmental Control Group?

UGA's financial departments are arranged in hierarchies referred to as "department trees".

These department trees define the Department Control Groups

The Parent and Budget Control Type provides the information needed to place the department in these trees.



Departmental Tree Report

NEW REPORT ADDED 11/2022



Departmental Tree Report

- Navigation: reports.uga.edu or directly at [Operational Reports > Financials > Chartfield Reports](#)

← Undo → Redo ↶ Revert 🔄 Refresh ⏸ Pause

UNIVERSITY OF GEORGIA

UGA Financial Department Tree

Review the entire tree or set filters below to isolate sections of the tree.

Major School/ College/ Unit
(All)

Dept Status
Active

Budget Year Tree
FY 2023

Search Dept ID

Search Help

Control Type Key

UL = Upper Level Reporting

CT = Transactional w/ Control

C = Control

T = Transactional

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Type (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Type (Lvl 5)	Dept Desc (Lvl 5)	Dept ID (Lvl 6)	Ctrl Type (Lvl 6)	Dept Desc (Lvl 6)
10000000	UL	Office of the President	1000100A	UL	President's Office	10001000	CT	President's Office						
						10001001	CT	Subsistence Allowan..						
						10001002	CT	Admin Minority Recr..						
						10001003	CT	Deferred Compensat..						
						10001004	CT	President's House						
			10001DIR	CT	Director Searches									
			10001VPS	CT	Provost/VP Searches									
			10002000	CT	Internal Audit									
			1000400A	UL	Equal Opportunity Office IU	10003000	CT	Applicant Clearingho..						
						10004000	CT	Equal Opportunity O..						
			10005000	CT	Legal Affairs Office									
14000000	UL	SR VP for Acad Aff & Provost	1400100A	UL	Academic Affairs - IU	14001000	C	Academic Affairs	14001001	T	AA Administration			
									14001002	T	Communications			
									14001003	T	Provost Expense			



Departmental Tree Report

- Navigation: reports.uga.edu or directly at [Operational Reports > Financials > Chartfield Reports](#)

← Undo → Redo ↩ Revert 🔄 Refresh ⏸ Pause

UGA Financial Department Tree
Review the entire tree or set filters below to isolate sections of the tree.

Control Type Key
UL = Upper Level Reporting
CT = Transactional w/ Control
C = Control
T = Transactional

Major School/ College/ Unit: (All) Dept Status: Active Budget Year Tree: FY 2023 Search Dept ID: [Search Help](#)

Major School/ College/ Unit

Dept ID (Lvl 2): 1000000

1000000 (All) 10001000 10001001 10001002 10001003 10001004

10001000 CT President's Office
10001001 CT Subsistence
10001002 CT Admin Minor
10001003 CT Deferred Con
10001004 CT President's H

14000000 UL SR VP for Acad Aff & Provost 14001004

Major School/ College/ Unit

(All) 19

19-College of Arts & Sciences

Cancel Apply

Major School/ College/ Unit

(All) Art

19-College of Arts & Sciences
41-AU/UGA Medical Partnership
66-Police Department

Cancel Apply

To filter for one Major School/College/Unit

- Uncheck the (All) checkbox
- Enter the major unit or a portion of the description of the major unit in the search box, and click Apply
- If more than one result is shown, check the Major unit needed.



Departmental Tree Report

- Navigation: reports.uga.edu or directly at [Operational Reports > Financials > Chartfield Reports](#)

← Undo → Redo ↶ Revert 🔄 Refresh ⏸ Pause

UNIVERSITY OF GEORGIA

UGA Financial Department Tree

Review the entire tree or set filters below to isolate sections of the tree.

Major School/ College/ Unit: (All) Dept Status: Active Budget Year Tree: FY 2023 Search Dept ID: [Search Help](#)

Control Type Key
UL = Upper Level Reporting
CT = Transactional w/ Control
C = Control
T = Transactional

To filter For a Specific Department

- Enter the Department ID in the Search Dept ID filter box and hit Enter.

To filter for Multiple Specific Departments

- Enter the Department IDs, separated by commas.

Search Dept ID

19330ESG

Search Dept ID

19210203,19330ESG

Dept	Pre	Sub	Adm	Defi	Pre	Dept Desc (Lvl 6)
1000400A	UL					Equal Opportunity Office
10003000	CT					IU
10004000	CT					
10005000	CT					Legal Affairs Office
14000000	UL					SR VP for Acad Aff & Provost
1400100A	UL					Academic Affairs - IU
14001000	C					
14001003	T					Provost Expense



Departmental Tree Report

The “Parent” department is the level immediately above in the hierarchy.


Major School/ College/ Unit		Dept Status	Budget Year Tree	Search Dept ID	Control Type Key	
17-College of Agric & Environ Sci		Active	FY 2023		UL = Upper Level Reporting CT = Transactional w/ Control C = Control T = Transactional	
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	
17100000	C	Dean & Director	17100001	T	CAES Dean & Director Sum	
			17100100	T	CAES Dean	
			17100200	T	Office Admin	
			17100300	T	Program Support	
			17100310	T	Lead21	
			17100320	T	Assoc Public Landgrant Inst	
			17100330	T	Southern Region Small Fruit	
			17100500	T	CAES IDCR	
			17100600	T	AES IDCR	
			17100610	T	FACS IDC	
			17100700	T	CES IDCR	
			17100800	T	Integrative Precision Ag	
			17100998	CT	Payroll support	
			17100999	CT	CAES Benefit Pool	

- 17100000 is the “parent” to departments 17100001, 17100100, 17100200, etc.



Departmental Tree Report

The “Parent” department is the level immediately above in the hierarchy.

Major School/ College/ Unit  Dept Status Budget Year Tree Search Dept ID [Search Help](#) Control Type Key
UL = Upper Level Reporting
CT = Transactional w/ Control
C = Control
T = Transactional

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Typ (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Typ (Lvl 5)	Dept Desc (Lvl 5)
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	17100000	C	Dean & Director	17100001	T	CAES Dean & Director Sum
									17100100	T	CAES Dean
									17100200	T	Office Admin
									17100300	T	Program Support
									17100310	T	Lead21
									17100320	T	Assoc Public Landgrant Inst
									17100330	T	Southern Region Small Fruit
									17100500	T	CAES IDCR
									17100600	T	AES IDCR
									17100610	T	FACS IDC
									17100700	T	CES IDCR
									17100800	T	Integrative Precision Ag
						17100998	CT	Payroll support			
						17100999	CT	CAES Benefit Pool			

- 17000000 is the “parent” to departments 17100000, 17100998, and 17100999 .

- 17000000 is the “parent” to departments 17100000, 17100998, and 17100999 .



Departmental Tree Report

The “Parent” department is the level immediately above in the hierarchy.

Major School/ College/ Unit Dept Status Budget Year Tree Search Dept ID [Search Help](#)

Control Type Key
UL = Upper Level Reporting
CT = Transactional w/ Control
C = Control
T = Transactional

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Type (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Type (Lvl 5)	Dept Desc (Lvl 5)
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	17100000	C	Dean & Director	17100001	T	CAES Dean & Director Sum
									17100100	T	CAES Dean
									17100200	T	Office Admin
									17100300	T	Program Support
									17100310	T	Lead21
									17100320	T	Assoc Public Landgrant Inst
									17100330	T	Southern Region Small Fruit
									17100500	T	CAES IDCR
									17100600	T	AES IDCR
									17100610	T	FACS IDC
									17100700	T	CES IDCR
									17100800	T	Integrative Precision Ag
						17100998	CT	Payroll support			
						17100999	CT	CAES Benefit Pool			

- 14000000 is the “parent” to department 17000000.



Departmental Tree Report

- Navigation: reports.uga.edu or directly at [Operational Reports > Financials > Chartfield Reports](#)

Dept ID (Lvl 5)	Ctrl Typ (Lvl 5)	Dept Desc (Lvl 5)	Dept ID (Lvl 6)	Ctrl Typ (Lvl 6)	Dept Desc (Lvl 6)	Dept ID (Lvl 7)	Ctrl Typ (Lvl 7)	Dept Desc (Lvl 7)
19330000	UL	MUSI Hugh Hodgson Sch of ...	19330ESG	CT	MUSI Emily S. Gertsch			

Major School/ College/ Unit (All)	Dept Status Active	Budget Year Tree FY 2023	Search Dept ID 19330000	Search Help
--------------------------------------	-----------------------	-----------------------------	----------------------------	-----------------------------

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Type (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Type (Lvl 5)	Dept Desc (Lvl 5)	Dept ID (Lvl 6)	Ctrl Type (Lvl 6)	Dept Desc (Lvl 6)	D (Lvl 7)
14000000	UL	SR VP for Acad Aff & Provost	19000000	UL	College of Arts & Sciences	19000300	UL	FC FINE & PERF ARTS	19330000	UL	MUSI Hugh Hodgson Sch of Music	19330047	CT	MUSI Stdyabrdity	
												19330048	CT	MUSI Fldstdyny	
												19330101	CT	MUSI Department General	
												19330102	CT	MUSI PAC Support	
												19330103	CT	MUSI Opera Support	
												19330104	CT	MUSI Arco Support	
												19330105	CT	MUSI Graduate Students	
												19330106	CT	MUSI 3rd Thurs Don8	
												19330107	CT	MUSI Online Class Support	


To see the department and any siblings




- Locate the Department
- Note the Parent to the Department
- Filter for the Parent Department.



Departmental Tree Report

The “Parent” department is the level immediately above in the hierarchy.

Major School/ College/ Unit  Dept Status Budget Year Tree Search Dept ID [Search Help](#)

17-College of Agric & Environ Sci  Active  FY 2023 

Control Type Key:
UL = Upper Level Reporting
CT = Transactional w/ Control
C = Control
T = Transactional

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Typ (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Typ (Lvl 5)	Dept Desc (Lvl 5)
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	17100000	C	Dean & Director	17100001	T	CAES Dean & Director Sum
									17100100	T	CAES Dean
									17100200	T	Office Admin
									17100300	T	Program Support
									17100310	T	Lead21
									17100320	T	Assoc Public Landgrant Inst
									17100330	T	Southern Region Small Fruit
									17100500	T	CAES IDCR
									17100600	T	AES IDCR
									17100610	T	FACS IDC
									17100700	T	CES IDCR
									17100800	T	Integrative Precision Ag
						17100990	CT	Payroll support			
						17100995	CT	CAES Benefit Pool			

Each Department's Budgetary Control Type is Listed.

- Each Department’s Budgetary Control Type is Listed.



Types of Budgetary Control

(UL)	Upper Level Reporting	Only used as Summary levels for Reporting. No Transactions can be recorded here. No Budgetary Control
(CT)	Transactional with Control	Transactions can be recorded to these departments. The department stands alone as its own Department Control Group. Has no departments beneath it (No Children).
(C)	Control	Parent to (T) Transactional Only Departments, who together comprise the Department Control Group. Transactions can not be recorded to these departments.
(T)	Transactional only	Transactions can be recorded to these departments. Budgetary Control Group includes all departments with same (C) Control Department parent Has no departments beneath it (No Children)



Types of Budgetary Control

Departments 17100001 through 17100700 are in the same Department Control Group, as they are “sibling” departments under their Control (C) Department Parent 17100000

Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Typ (Lvl 4)	Dept Desc (Lvl 4)	Dept ID (Lvl 5)	Ctrl Typ (Lvl 5)	Dept Desc (Lvl 5)
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	17100000	C	Dean & Director	17100001	T	CAES Dean & Director Sum
									17100100	T	CAES Dean
									17100200	T	Office Admin
									17100300	T	Program Support
									17100310	T	Lead21
									17100320	T	Assoc Public Landgrant Inst
									17100330	T	Southern Region Small Fruit
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									17100600	T	AES IDCR
									17100610	T	FACS IDC
									17100700	T	CES IDCR
									17100800	T	Integrative Precision Ag
									17100999	CT	CAES Benefit Pool

(C)	Control	Parent to (T) Transactional Only Departments, who together comprise the Department Control Group. Transactions can not be recorded to these departments.
(T)	Transactional only	Transactions can be recorded to these departments. Budgetary Control Group includes all departments with same (C) Control Department parent Has no departments beneath it (No Children)

Departments 17100998 and 17100999 are both Transactional and a standalone Department Control Group

Department 14000000			Department 17000000			Department 17100000		
Dept ID (Lvl 2)	Ctrl Type (Lvl 2)	Dept Desc (Lvl 2)	Dept ID (Lvl 3)	Ctrl Type (Lvl 3)	Dept Desc (Lvl 3)	Dept ID (Lvl 4)	Ctrl Type (Lvl 4)	Dept Desc (Lvl 4)
14000000	UL	SR VP for Acad Aff & Provost	17000000	UL	College of Agric & Environ Sci	17100000	C	Dean & Director
(CT) Transactional with Control Transactions can be recorded to these departments. The department stands alone as its own Department Control Group. Has no departments beneath it (No Children).			17100001	T	CAES Dean & Director Sum	17100100	T	CAES Dean
			17100200	T	Office Admin	17100300	T	Program Support
			17100310	T	Lead21	17100320	T	Assoc Public Landgrant Inst
			17100330	T	Southern Region Small Fruit	17100500	T	CAES IDCR
			17100600	T	AES IDCR	17100610	T	FACS IDC
			17100700	T	CES IDCR	17100800	T	Integrative Precision Ag
			17100998	CT	Payroll support	17100999	CT	CAES Benefit Pool



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #2:

REQUIRED TO UPDATE DEPARTMENT TO INACTIVE:

Specify the active, **transactional department (Budgetary Control Type CT or T)** to which any remaining transactions or balances can be rerouted. Be sure that the required preparations specified in the Finance Department Maintenance Checklist have been completed.

https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx

How can you determine what departments are Active and transactional?

- OIR Reports.uga.edu Department Tree Report



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #3:

BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT

What is the Parent Department?

Question #4:

BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT

What is the Budgetary Control Type?

- (UL) Upper Level Reporting
- (C) Control Only
- (CT) Transactional with Control
- (T) Transactional Only



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Type	Accepts Transactions?	Budgetary Control?	Can have Children?	Parent must be	
Upper Level Reporting (UL)	NO	NO. Reporting Only	Yes – other UL, C, or CT. NO T	Other Upper Level reporting (UL)	Departments that represent the higher level reporting unit – ex, School or College/ VP
Transactional with Control (CT)	YES	YES. Budgetary Control over itself only	NO, cannot have children	Upper Level reporting (UL)	The department can accept transactions Only that department's available budget is compared to the transaction
Control (C)	NO	YES. Budgetary control over its Child Departments.	Yes, MUST have children. T only	Upper Level Reporting (UL)	The department can NOT accept transactions, only its children departments can accept transactions Any transaction entered for any of its children departments is compared to the aggregate available budget for all its child departments
Transactional only (T)	YES	NO. Budgetary control is at Control (C) Department Parent	No, Cannot have children	Control (C)	A department at this level accepts transactions, but budget availability is determining by looking at the aggregate available budget for all departments falling under the same Control (C) Department



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Question #3:

BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT
What is the Parent Department?

Question #4:

BUDGETARY CONTROL: REQUIRED FOR NEW DEPARTMENT
What is the Budgetary Control Type?

- (UL) Upper Level Reporting
- (C) Control Only
- (CT) Transactional with Control
- (T) Transactional Only

If adding a new Control only Department, the request for at least one Transactional only child of the department should be submitted simultaneously.

We are not able to add a Control only Department to any of the Departmental trees unless we can add at least one child for it at the same time. If a Control only Department is submitted and there is no Chartfield Request for a department that will be a child to the department, we will have to deny the request.



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Submit the Request for Approval

5. Please ensure that all activities related to Changing or adding departments have been completed. Refer to the Department Maintenance Checklist found at https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx

Answer

Select Request Action "Submit for Approval" then "Go"

► Trees

Request Action

Requester

Entered By dsalum Salum,Paula Diane Entered Date/Time 10/28/2021 10:01AM

Updated By dsalum Salum,Paula Diane Updated Date/Time 10/28/2021 10:01AM



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Chartfield Approval

If you know that you have the Chartfield Approval role, you can skip this step and go to the Submitter Approval Step.

5.

Please ensure that all activities related to Changing or adding departments have been completed. Refer to the Department Maintenance Checklist found at https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx

Answer

Select "View Approval Flow" hyperlink

► Trees

► Approval Comments

Request Action

Go

Requester

dsalum

Salum,Paula Diane

Entered By

dsalum

Salum,Paula Diane

Entered Date/Time

10/28/2021 10:01AM

Updated By

dsalum

Salum,Paula Diane

Updated Date/Time

11/03/2021 1:50PM

Save

Return to Search

Notify

View Approval Flow



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Chartfield Approval

If you know that you have the Chartfield Approval role, you can skip this step and go to the Submitter Approval Step.

Select the Green Plus Icon between your approval and UGA GL Central Acct Office Approval

The screenshot displays the 'CFApproval' interface for 'Request ID 0000013421:Pending'. It shows an approval flow with two steps: 'UGA CF Request Approval' (Pending) and 'UGA GL Central Acct Office' (Not Routed). The first step is assigned to 'Salum, Paula Diane' with the role 'UGA_CF_RQST_INITIATOR'. The second step is assigned to 'Multiple Approvers' with the role 'UGA GL Central Acct Office'. A red arrow points to the green plus icon between the two steps, indicating where to click to add a new approval step. The interface also includes a 'Return' button at the bottom left and a 'Help' link at the top right.



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Chartfield Approval

If you know that you have the Chartfield Approval role, you can skip this step and go to the Submitter Approval Step.

Select the Green Plus Icon between your approval and UGA GL Central Acct Office Approval

Approval Flow

CFApproval

Request ID 0000013421:Pending

UGA CF Request Approval

Pending

Salum, Paula Diane

UGA_CF_RQST_INITIATOR

UGA GL Central Acct Office

Multiple Approvers

Comments

Return

If you are listed as a CF Approver, hit Cancel and skip this step



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Chartfield Approval

If you know that you have the Chartfield Approval role, you can skip this step and go to the Submitter Approval Step.

Enter your CF Approver's User ID if you know it, or select the search icon to see the list of CF Approvers.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:



Insert as:

☒ Approver

☐ Reviewer

Insert

Cancel

Approver/Reviewer Search

Name:

begins with

User ID:

begins with

Search

Clear

Cancel

abrazell

agarber

ajewell

amandabp

amc12811

amybrown

annemari

asinha

bmerola

bowa

Parr,Allison Leigh

Garber,Andrew M

Jewell,Angela R

Patterson,Amanda Bates

Clayton,Anne M

Brown,Amy L

Cunningham,Anne Marie

Sinha,Anuj K

Merola,Brenda M

Bow,Ashley H



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Chartfield Approval

If you know that you have the Chartfield Approval role, you can skip this step and go to the Submitter Approval Step.

Insert additional approver or reviewer

Choose an approver or reviewer to insert

User ID:



Insert as:

☒ Approver

☐ Reviewer

Insert

Cancel

Enter your CF Approver's User ID if you know it, or select the search icon to see the list of CF Approvers.

Approver/Reviewer Search

Name:

begins with

User ID:

begins with

Search

Clear

Cancel

abrazell

agarber

ajewell

amandabp

amc12811

amybrown

annemari

asinha

bmerola

bowa

Parr,Allison Leigh

Garber,Andrew M

Jewell,Angela R

Patterson,Amanda Bates

Clayton,Anne M

Brown,Amy L

Cunningham,Anne Marie

Sinha,Anuj K

Merola,Brenda M

Bow,Ashley H

If you are listed as a CF Approver, hit Cancel and skip this step without inserting the CFO Approval step



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

Insert CFO Approval

If you have the Chartfield Approval role, only the first and last approval workflow steps appear.

Approval Flow

CFApproval

Request ID 0000013421:Pending

UGA CF Request Approval

Pending

Salum, Paula Diane
UGA_CF_RQST_INITIATOR

Not Routed

Rosso, Stephanie
Inserted Approver

Not Routed

Multiple Approvers
UGA GL Central Acct Office

Comments

Save Approval Flow Changes

Return

Save the Approval Flow Changes then Select Return



Chartfield Request - Departments

- Navigation: Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request

5.

Please ensure that all activities related to Changing or adding departments have been completed. Refer to the Department Maintenance Checklist found at https://onesource.uga.edu/_resources/files/documents/Finance_Departmental_Maintenance_Checklists.xlsx

Answer

Select Request Action "Approve" and select "Go"

► Trees

► Approval Comments

Request Action Approve

Go

[View Approval Flow](#)

Requester dsalum

Salum,Paula Diane

Entered By dsalum

Salum,Paula Diane

Entered Date/Time 10/28/2021 10:01AM

Updated By dsalum

Salum,Paula Diane

Updated Date/Time 11/03/2021 1:50PM

Save

[Return to Search](#)

[Notify](#)



Chartfield Request - Departments

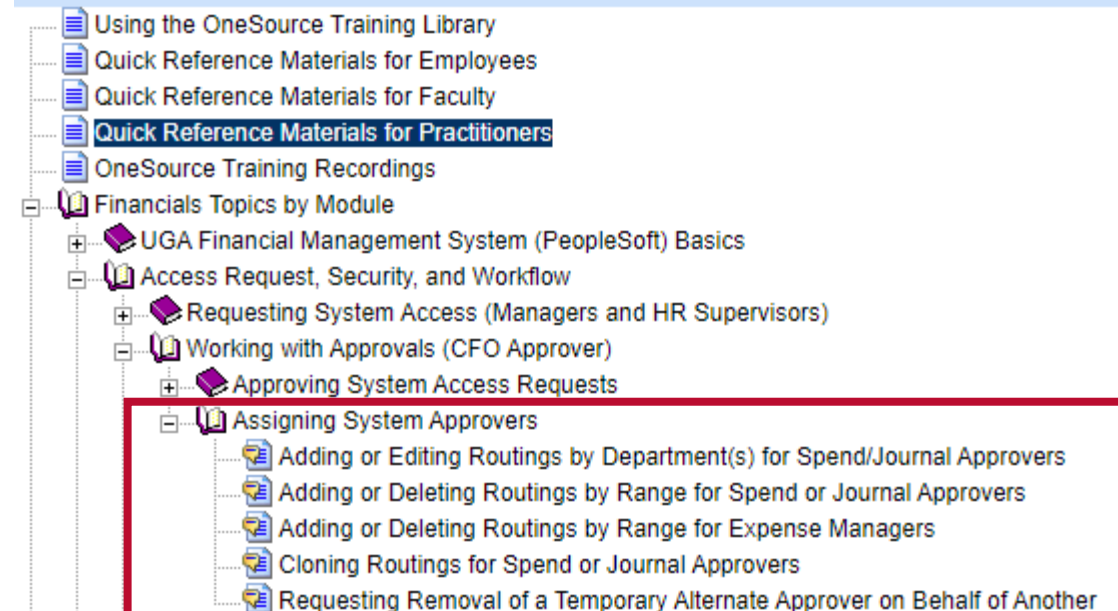
- When the Department is approved, the requester will receive email notification.
- Shortly thereafter, the requester will receive email notification that the Route Control Profile has been created and the CFO assigned.



Department Approvers

- Approvers must be established for new departments, unless the new department is within a range for which Approvers have already been established.
- See UPK at https://training.onesource.uga.edu/UPK_Training/OneSourceOL/Publishing%20Content/PlayerPackage/data/toc.html

<https://training.onesource.uga.edu>





Departments In the Data Warehouse

- New departments and changes will appear in OIR Data Warehouse Reports the next day.
- A new department will not appear in any balance or transactional based OIR Data Warehouse Reports until the new department has activity.

Thank you!



Commitment Management
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