User Guide for the Golden Tree Modification Request System:

COST CENTERS & PROJECT CODES

Created September 2011

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Background

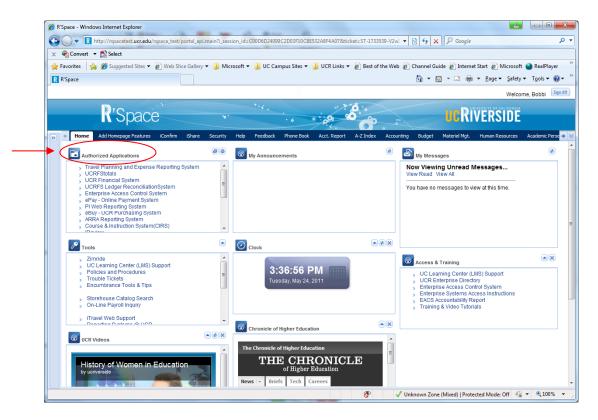
Cost Centers and Project Codes are values established in the UCR Financial System (UCRFS) to assist departments and/or Organizations to track transactions. These codes are defined by departments and used at the discretion of the campus departments. These codes do not have any "institutional" meaning like the account, activity, fund or function codes and are not required as part of a transaction's Full Accounting Unit (FAU). Although there is no institutional value associated with these codes, the use of these codes may be very important to your department financial management to assist in the tracking and reporting of revenue and/or expenses.

Access

Access to the Golden Tree Modification System is granted by departmental System Access Administrators (SAA) via the Enterprise Access Control System (EACS) for specific Accountability Structures. At this time, there are two roles available in this application: Transactor-CC/PC and Courtesy Copy-CC/PC. The Transactor-CC/PC roles allows the user to request new cost centers and project codes, modify titles of existing cost centers and project codes, and inactivate/re-activate existing cost centers and project codes for their Accountability Structure(s). The Courtesy Copy-CC/PC role only provides the user with an e-mail as cost centers and project codes are added, modified, and inactivate/re-activated for a given Accountability Structure.

Future phases of this application will involve other Full Accounting Unit (FAU) data elements such as activity codes and fund numbers.

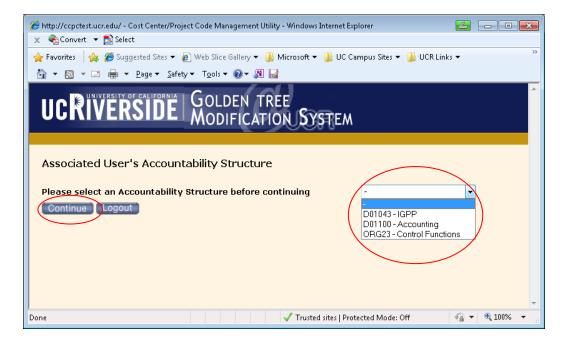
Users assigned the Transactor-CC/PC role will access the <u>Golden Tree Modification System</u> from their list of Authorized Applications in R'Space.



COST CENTERS

Adding a New Cost Center

STEP 1: If the transactor has been granted access to the Golden Tree Modification System for more than one Accountability Structure, the user must select the appropriate Accountability Structure from their drop down menu and click on "continue". Note: users assigned to one Accountability Structure will by-pass this step.



STEP 2: Under the menu Transactor Options, click on Add/Modify Cost Center.

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STEP 3a: To avoid subsequent error messages, the transactor should perform a "search" to ensure the cost center code does not already exists by selecting the code "pre-fix" from the drop down list and clicking on "Search". Please note if only one "pre-fix" code is associated with the Accountability Structure, it will automatically be pre-populated.

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A list of all codes matching the search criteria (in this example, code "pre-fix" begins with "SB") will be displayed.

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Depending upon the volume of cost centers associated with a particular Accountability Structure, searches can also be performed on specific codes by entering additional information in the field next to the code "pre-fix".

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If a match to the search criteria exists, it will be displayed (in this example, the cost center code begins with "SBT".

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STEP 3b: To avoid duplicate cost centers with the same description, the transactor should also perform a "search" to ensure the description has not previously been assigned to a different cost center code.

Note the description search can be performed by using either "starts with" or "contains" function. Click on "search".

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If a match exists, it will be displayed.

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STEP 4: If the code does not exist, click on "Add Code" to request a new cost center code.

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STEP 5: All fields designated in red italics are required.

a. Under the "Code Requested" area, select the appropriate two-digit pre-fix for the new Cost Center from the drop down list.

b. Enter up to three characters (alpha and/or numeric) in the field next to the pre-fix. The total Cost Center value (pre-fix plus suffix) may not exceed 5 characters.

c. Enter the Short Description (up to 10 characters). This is an optional field.

d. Enter the Long Description (up to 30 characters). This is a required field. This description will appear on the Golden Tree Viewer as well as the FAU description field of the various UCR applications.

e. A Comment can be optionally included. Special instructions to Accounting should be included here.

f. Click on "Submit" to forward the request to Accounting. ("Save and Exit" will save the item as "work-in-progress" for submission at a later time. "Cancel" will delete the action.)

In the example below, the user is completing a request to add Cost Center "SBSLP".

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STEP 6: A confirmation that the request has been successfully submitted will display. Please allow 7-10 working days for your request to be processed.

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STEP 7: The requestor will receive an e-mail when the request has been approved or denied by the Accounting Office. Please note that all other Cost Center/Project Code Transactors and Courtesy Copy roles associated

with the same Accountability Structure will also be copied on the e-mail. Question will be directed to the individual that initiated the cost center request.

When the code has been approved, it will appear on the Golden Tree Viewer. If the code is denied, the e-mail will include the reason.

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ccpctestwebmaster@ucr.edu		232323 ^

"MODIFYING" an existing Cost Center's Description

Please note Transactors have the ability to modify the description of any cost center under their Accountability Structure(s); there is no approval process required by the Accounting Office. However, department financial manager may want to develop departmental procedures and guidelines for Transactors.

STEP 1: Determine the Cost Center Description requiring modification. Under the menu Transactor Options, click on Add/Modify Cost Center.

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STEP 2: Search for the cost center to be modified either by specifying information about the cost center code and/or the cost center description then clicking on "search".

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STEP 3: Select the Code to Modify by clicking on it.

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STEP 4: Modify the description(s) and click on "Update". Remember: the Long Description is a mandatory field and can be a maximum of 30 characters long; this is the description that appears on Golden Tree Viewer as well as the FAU description field of the various UCR applications. The Short Description is optional and can be a maximum of 10 characters long and is only displayed in the UCRFS Chart-field Attributes screen.

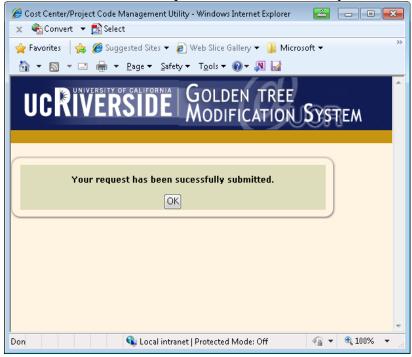
Comments are optional, but it is recommended that this field be used to document the reason for the description modification.

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STEP 5: The system will ask the user to confirm the change; click on "Submit" to proceed (to withdraw the modification, click on "Cancel".)

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A confirmation that the request has been successfully submitted will display.



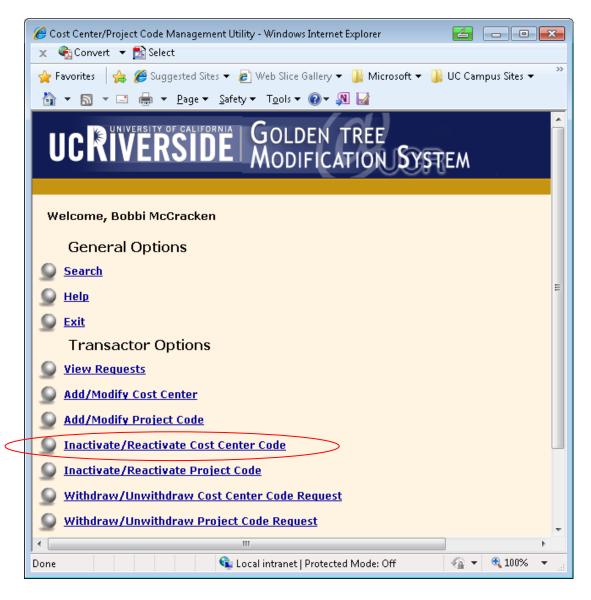
STEP 6: An e-mail will be sent to all Transactors and Courtesy Copy roles confirming the modification to the Cost Center.

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"INACTIVATING" or "REACTIVATING" a Cost Center

Please note Transactors have the ability to inactivate and reactivate any cost center under their Accountability Structure(s); there is no approval process required by the Accounting Office. However, department financial managers may want to develop departmental procedures and guidelines for Transactors.

<u>STEP 1: Determine the cost center to inactivate or reactivate.</u> Under the menu Transactor Options, click on Inactivate/Reactivate Cost Center Code



STEP 2: Search for the Cost Center to be "inactivated" (or "reactivated").

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STEP 3a-Inactivating a Cost Center: From the Search grid displayed, click on "Inactivate" under the Action column. The system will query UCRFS to determine if the code is eligible to be inactivated. A code is eligible to be inactivated if there is no current fiscal year activity in the Actuals ledger under the cost center AND there are no encumbrance balances associated with the cost center. Please note this process may take several seconds to complete while the sytem queries the database.

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If the code is eligible for "inactivation", the system will update the first five characters of the Cost Center description to "INACT" and updates the code status to "I" for Inactive. This Cost Center will no longer be available for use on transactions.

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Upon inactivation, an e-mail will be sent to all Transactors and Courtesy Copy roles associated with the Accountability Structure. Questions will be directed to the individual that initiated the inactivation request.

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From: ccpctestwebmaster@ucr.edu To: Bobbi A McCracken Cc: Subject: Cost Center SB123 has been inactivated				Sent: Fri 9/2/	2011 8:35 PM
Your request to inactivate Cost Center Code SB12 SB123 Description: INACT test adding cc Please send all responses to BOBBIB@ucr.edu	3 has been processed.				
This is an automatically generated message. Plea will be returned to you by the mail server.	se do not "REPLY" to <u>copc</u>	webmaster@ucr.ed	l <u>u</u> as your messag	ge will not be received	
CC: <u>MARLAR@ucr.edu</u> <u>JERRYM@ucr.edu</u> <u>JERRYM@ucr.edu</u> <u>VICKIT@ucr.edu</u> <u>BOBBI@ucr.edu</u> <u>DAVIDG@ucr.edu</u>					
ccpctestwebmaster@ucr.edu				Ş	× 2.2. ^

STEP 3b-Reactivating a Cost Center: From the Search grid displayed, click on "Reactivate" under the Action column.

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Once "reactivate" is clicked, the Cost Center description will automatically update to remove "INACT" from the cost center description and the Status will change to "A" for Active. The code is now available for use.

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An e-mail will be sent to all Transactors and Courtesy Copy roles associated with the Accountability Structure. Questions will be directed to the individual that initiated the re-activation request.

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To: Bobbi Cc:	estwebmaster@ucr.edu A McCracken Center SB567 has been reactivated				Sent: Fri 9/2/.	
Your request to reactivate Cost Center Code SB567 has been processed. SB567 Description: testing long desc on add Please send all responses to <u>BOBBIB@ucr.edu</u> This is an automatically generated message. Please do not "REPLY" to <u>copcwebmaster@ucr.edu</u> as your message will not be received and						
will be returned to you by the mail server.						
MARLAR@ucr.edu KIMPAD@ucr.edu JERRYM@ucr.edu LUPER@ucr.edu VICKIT@ucr.edu BOBBIB@ucr.edu DAVIDG@ucr.edu						
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WITHDRAW/UNWITHDRAW a Cost Center Request

When a Transactor selects "Save and Exit" when adding a new cost center, the item will remain in the Accountability Structures "work-in-progress". If the code will not be added, the Transactor may "withdraw" the request to add the cost center to remove the request from the work in progress grid. Additionally, items that have previously been withdrawn can be "un-withdrawn" and returned to the work in progress status.

STEP1: Determine the cost center request to withdraw or un-withdraw. Under the menu Transactor Options, click on Withdraw/Unwithdraw Cost Center Code

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STEP 2a-Withdrawing a request: Search the Work In Progress for the pending cost center code by selecting the appropriate code pre-fix, selecting WIP-Dept under the status field, and clicking on "search".

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The codes matching the search criteria will display in the grid. Click on "Withdraw" under the Action column to remove the item from the department work in progress grid:

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1 record(s) found
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The system will display the following screen where comments regarding the reason for the withdrawl can be entered. Click on "Submit" to withdraw the request.

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A confirmation will display. An e-mail confirmation will <u>not</u> be sent.

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STEP 2b: Unwithdrawing a previously withdrawn request: Search the Work In Progress for the pending cost center code by selecting the appropriate code pre-fix, selecting Withdraw under the status field, and clicking on "search".

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The codes matching the search criteria will display in the grid. Click on "Unwithdraw" under the Action column to move the item back to the department work in progress grid:

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The system will display the following screen where comments regarding the reason for the un-withdrawing can be entered. Click on "Submit" to un-withdraw the request.

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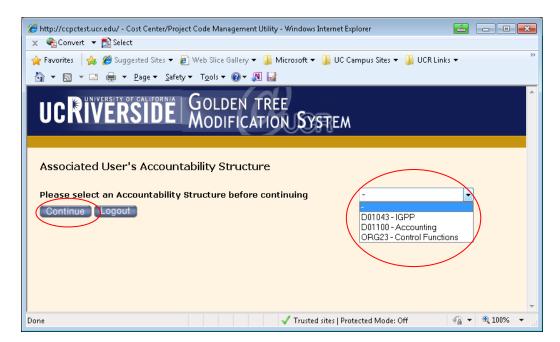
A confirmation of the action will display. An e-mail confirmation will <u>not</u> be sent. The code will now appear in the department Work In Progress grid.

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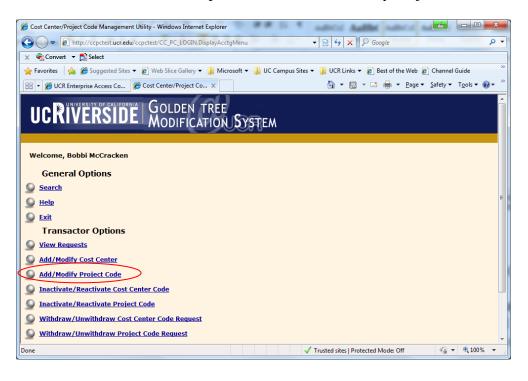
PROJECT CODES

Adding a New Project Code

STEP 1: If the transactor has been granted access to the Golden Tree Modification System for more than one Accountability Structure, the user must select the appropriate Accountability Structure from their drop down menu and click on "continue". Note: users assigned to one Accountability Structure will by-pass this step.



STEP 2: Under the menu Transactor Options, click on Add/Modify Project Code.



STEP 3a: To avoid subsequent error messages, the transactor should perform a "search" to ensure the project code does not already exists by selecting the code "pre-fix" from the drop down list and clicking on "Search". Please note if only one "pre-fix" code is associated with the Accountability Structure, it will automatically be pre-populated.

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A list of all codes matching the search criteria (in this example, code "pre-fix" begins with "SB") will be displayed.

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Depending upon the volume of project codes associated with a particular Accountability Structure, searches can also be performed on specific codes by entering additional information in the field next to the code "pre-fix".

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Search Near Main Menu Add Code	
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If a match to the search criteria exists, it will be displayed (in this example, the project code begins with "SB" followed by the letter "T".

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STEP 3b: To avoid duplicate cost centers with the same description, the transactor should also perform a "search" to ensure the description has not previously been assigned to a different cost center code. Note the description search can be performed by using either "starts with" or "contains" function. Click on "search".

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If a match exists, it will be displayed.

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STEP 4: If the desire code does not exist, click on "Add Code" to request a new project code.

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STEP 5: All fields designated in red italics are required.

a. Under the "Code Requested" area, select the appropriate two-digit pre-fix for the new Project Coder from the drop down list.

b. Enter up to three characters (alpha and/or numeric) in the field next to the pre-fix. The total Project Code value (pre-fix plus suffix) may not exceed 5 characters.

c. Special Note: Project Codes do not have to begin with the pre-defined prefix. However, if NO prefix is selected, the Project Code must start with a NUMBER; the maximum length of this type of project code is 5 characters. Please be aware, Project Codes beginning with a number are assigned on a first-come- first-serve basis and will not appear under your departmental pre-assigned prefix; so it is important to include your department code within the project code description to readily identify your departmental codes.

d. Enter the Short Description (up to 30 characters). This is a require field. This description displays on the Golden Tree Viewer as well as the FAU description field of the various UCR applications. e. Enter the Long Description (up to 254 characters). This is a required field. This description appears in the UCRFS Chart field Attributes and should provide additional information regarding how the code will be used.

f. A Comment can be optionally included. Special instructions to Accounting should be included here. g. Click on "Submit" to forward the request to Accounting. ("Save and Exit" will save the item as "work-in-progress" for submission at a later time. "Cancel" will delete the action.)

	Code Management Utility - Windows Internet Explorer
Add Code	
Type Code Requested Short Desciption	Project Code
Long Description	
Comments	-
Submit Save	& Exit Cancel
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In the example below, the user completed a request to add Project Code "SBTA".

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	RSIDE GOLDEN TREE
Add Code	
Type Code Requested	Project Code
Short Desciption	AP Travel Audit Reporting
Long Description	Streamlining Project Accounts Payable Travel Audit Reporting. This project code
Comments	As requested by the Department Financial Manager J. Jones on 7/5/11
Submit Save	& Exit Cancel
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STEP 6: Upon clicking on "submit", a confirmation that the request has been successfully submitted will display. Please allow 7-10 working days for your request to be processed.

🍘 Cost Center/Project Code Management Utility - Windows Internet Explorer
UCRIVERSITY OF CALIFORNIA MODIFICATION SYSTEM
Your request has been sucessfully submitted.
ОК
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STEP 7: The requestor will receive an e-mail when the request has been approved or denied by the Accounting Office. Please note that all other Cost Center/Project Code Transactors and Courtesy Copy roles associated with the same Accountability Structure will also be copied on the e-mail. Questions will be directed to the individual that initiated the project code request.

When the code has been approved, it will appear on the Golden Tree Viewer. If the code is denied, the e-mail will include the reason.

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"MODIFYING" an existing Project Code's Description

Please note Transactors have the ability to modify the description of project codes that utilize the "pre-fixes" associated with their Accountability Structure(s)*; there is no approval process required by the Accounting Office. However, department financial managers may want to develop departmental procedures and guidelines for Transactors. * Please note that users may <u>not</u> modify the description of project codes using numeric pre-fixes using this system.

STEP 1: Determine the Project Code Description requiring modification. Under the menu Transactor Options, click on Add/Modify Project Code.

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STEP 2: Search for the project code to be modified either by specifying information about the project code and/or the project code description then clicking on "search". If a search is being performed on the project code description, the query will be performed against the project code short description only.

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STEP 3: Select the Code to Modify by clicking on it.

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STEP 4: Modify the description(s) and click on "Update". Remember: the Short Description is a mandatory field and can be a maximum of 30 characters long; this is the description that appears on Golden Tree Viewer as well as the FAU description field of the various UCR applications. The Long Description can be a maximum of 256 characters long and is only displayed in the UCRFS Chart-field Attributes screen. Comments are optional, but it is recommended that this field be used to document the reason for the description modification.

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Type	ProjectCode
Code Requested	SBIST
Short Description	Test Project Code modify
ong Description	Test PC modify
Comments	Updating description to spell out meaning of PC A in project code description.

STEP 5: The system will ask the user to confirm the change; click on "Submit" to proceed (to withdraw the modification, click on "Cancel".)

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A confirmation that the request has been successfully submitted will display.

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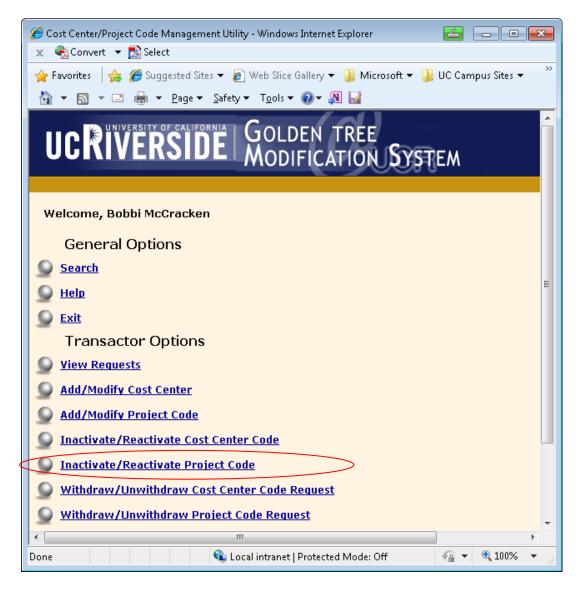
STEP 6: An e-mail will be sent to all Transactors and Courtesy Copy roles confirming the modification to the Project Code. Questions will be directed to the individual that initiated the project code request.

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"INACTIVATING" or "REACTIVATING" a Project Code

Please note Transactors have the ability to inactivate and reactivate project codes under their Accountability Structure(s)*; there is no approval process required by the Accounting Office. However, department financial managers may want to develop departmental procedures and guidelines for Transactors. * Please note that users may not inactivate/reactivate of project codes using numeric pre-fixes

<u>STEP 1:</u> Determine the project code to inactivate or reactivate. Under the menu Transactor Options, click on Inactivate/Reactivate Project Code



STEP 2: Search for the Project Code to be "inactivated" (or "reactivated").

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STEP 3a-Inactivating a Project Code: From the Search grid displayed, click on "Inactivate" under the Action column. The system will query UCRFS to determine if the code is eligible to be inactivated. A code is eligible to be inactivated if there is no current fiscal year activity in the Actuals ledger under the project code AND there are no encumbrance balances associated with the project code. Please note this process may take several seconds to complete while the system queries the database.

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If the code is eligible for "inactivation", the system will update the first five characters of the Project Code description to "INACT" and updates the code status to "I" for Inactive. This Project Code will no longer be available for use on transactions.

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An e-mail will be sent to all Transactors and Courtesy Copy roles associated with the Accountability Structure. Questions will be directed to the individual that initiated the project code inactivation.

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STEP 3b-Reactivating a Project Code: Search for the code and from the Search results grid, click on "Reactivate" under the Action column.

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Once "reactivate" is clicked, the Project Code description will automatically update to remove "INACT" from the project code description and the Status will change to "A" for Active. The code is now available for use.

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An e-mail will be sent to all Transactors and Courtesy Copy roles associated with the Accountability Structure. Questions will be directed to the individual that initiated the project code re-activation.

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WITHDRAW/UNWITHDRAW a Project Code Request

When a Transactor selects "Save and Exit" when adding a new project code, the item will remain in the Accountability Structures "work-in-progress". If the code will not be added, the Transactor may "withdraw" the request to add the project code and remove the request from the work in progress grid. Additionally, items that have previously been withdrawn can be "un-withdrawn" are returned to the work in progress status.

STEP1: Determine the project code request to withdraw or un-withdraw. Under the menu Transactor Options, click on Withdraw/Unwithdraw Project Code

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9 View Requests	
Add/Modify Cost Center	
Add/Modify Project Code	
<u>Inactivate/Reactivate Cost Center Code</u>	
<u>Inactivate/Reactivate Project Code</u>	
Withdraw/Unwithdraw Cost Center Code Request	
Withdraw/Unwithdraw Project Code Request	
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STEP 2a-Withdrawing a request: Search the Work In Progress for the pending project code by selecting the appropriate code pre-fix, selecting WIP-Dept under the status field, and clicking on "search".

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Code Starts With SB -	
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Search Clear Main Menu	
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The codes matching the search criteria will display in the grid. Click on "Withdraw" under the Action column to remove the item from the department work in progress grid:

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	VIVERSITY OF CALIFORNIA MODIFICA Project Code	TREE TION SYSTEM
	2	
	Project Code	Change Accountability Structure D01100 - Accounting
Code Description	Starts With SB	
Status	WIP-Dept -	
Search Select a 1 record(s)	Clear Main Menu Code to Withdraw/Unwithdraw	
Code	Description	Type Status Action
SBVEG	Vegetable	Project Code WIP-Dept Withdraw
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The system will display the following screen where comments regarding the reason for the withdrawl can be entered. Click on "Submit" to withdraw the request.

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Withdraw Code	
176-	PC
	SBVEG
	Vegetable
Long Description	Test of WIP-Vegetable
	Per the department financial manager the establishment of this code is no longer required.
Submit Cancel	
Done	v Trusted sites Protected Mode: Off v € 100% v

A confirmation of the withdrawl will display. An e-mail will not be sent.

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UCRIVERSIDE GOLDEN TREE MODIFICATION SYSTEM
Your request of withdraw has been granted.
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STEP 2b: Unwithdrawing a previously withdrawn request: Search the Work In Progress for the pending project center code by selecting the appropriate code pre-fix, selecting Withdraw under the status field, and clicking on "search".

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Type Project Code Code Starts With SB >	Change Accountability Structure D01100 - Accounting
Description Starts With	
Status Withdraw -	
Search Clear Main Menu	
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The codes matching the search criteria will display in the grid. Click on "Unwithdraw" under the Action column to move the item back to the department work in progress grid:

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UCRIVERSITY OF CALIFORNIA GOLDEN TREE MODIFICATION S	уҙ҈ҭем
Search Project Code	
Type Project Code	Change Accountability Structure D01100 - Accounting
Code Starts With SB 🔻	
Description Starts With -	
Status Withdraw -	
Search Clear Main Menu	
Select a Code to Withdraw/Unwithdraw 1 record(s) found	
Code Description	Type Status Action
SBVEG Vegetable	Project Code Withdraw
Done	Cocal intranet Protected Mode: Off

The system will display the following screen where comments regarding the reason for un-withdrawing the item can be entered. Click on "Submit" to un-withdraw the request and move back to the work in progress grid.

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	SIDE GOLDEN TREE MODIFICATION SYSTEM	*
Unwithdraw Code		
Туре	PC	
Request Code	SBVEG	
Short Description	Vegetable	
Long Description	Test of WIP-Vegetable	
Comments	Due to a change in the department budget, this code will be used to track related expenditures.	
Submit Dancel		
Done	😪 Local intranet Protected Mode: Off	√a ▼ € 100% ▼

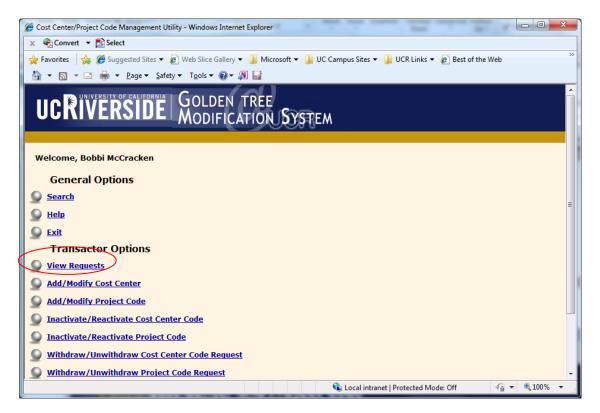
A confirmation of the action will display. An e-mail will <u>not</u> be sent. The code will now appear in the department Work In Progress grid.

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UCRIVERSIDE GOLDEN TREE MODIFICATION SYSTEM
Your request of unwithdraw has been granted.
Done 📢 🗸 Local intranet Protected Mode: Off 🦷 👻 🔍 100% 🔻

"VIEWING" a Request

This functionality can be used to determine the status of a request, to identify the individual that initiated the request, to see the history of a particular code, etc.

STEP 1: Under the menu Transactor's Options, select View Requests.



STEP 2: Enter the desired search criteria and click on "Search". By default the Accountability Structure will default to the last one used (or selected) by the Transactor. The search results can be limited by entering information in one or more of following fields:

- a.) Enter a date range in the "Requested Between" fields;
- b.) Select "Type" Cost Center or Project Code;
- c.) Enter a two-digit prefix in "Code" starts with;
- d.) Enter part of the description in "Description" starts with.
- e) Selecting the appropriate "Status":
 - i. "WIP-Dept" these are requests saved by the department and not yet "submitted";
 - ii. "Requested" these are requests that have been "submitted" by the department, but pending action by the Accounting Office;
 - iii. "WIP-Acctg" these are requests the Accounting Office is still working on;
 - iv. "Activated" these are requests that have been approved/activated;
 - v. "Denies" these are requests that have been rejected by the Accounting Office.

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STEP 3: Requests matching the search criteria will be displayed. In the screen shot below, the search criteria was defined as all request initiated between 04/01/2011 and 04/30/2011 for both cost centers and project codes beginning with "SB" under Accountability Structure D01100.

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CONTACTS

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Direct questions and comments regarding this system to <u>ucrfsfeedback@ucr.edu</u>