Moving an Activity/Dept/Devision Node



Moving Nodes

This guide will show you how to move an Activity, Department, or Division node.

Let's get started!

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Select the Views card.

Step 3 ≡ UCR Kristina Breckenridge UCROFC New Request Close 74 Natural Account | V1 : Account UCOP | V1 ACTIVITY | V1 FUND | V1 Flex 1 | V1 Flex2 | V1 Activity List (Do Not Change) Flex1 List (Do Not Change) Select Viewpoint • È × Click the UCROFC link.

Click the UCROFC link.

R			🛆 Kristina Breckenridge
UCROFC Natural Account V1 Account UCOP V1 Q < ÷	ACTIVITY VI < Select the Activity VI tab. X Flex2 VI	Activity List (Do Not Change) Flex1 List (Do Not Change)	New Request Close Select Viewpoint
I 🗸 Name	Description US	Properties Locations History	
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Select the Activity | V1 tab.

Ste	ep 5							
≡U	CR							🗅 Kristina Breckenridge 🔻
1 1 1 1	UCRO	Select the Search field. $ imes$						New Request Close
27	Natura	In the future, you can click the arrows below to drill down to find your desired field before the next step.	ACTIVITY V1 : FUND V1	Flex 1 V1	ТОТ	Flex2 V1 >		Select Viewpoint
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						Description		
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						US NET CODE		

Select the Search field.

In the future, you can click the arrows below to drill down to find your desired field before the next step.

CR						🛆 Kristina Breckenridge
UCROFC Natural Account V1	This is where you will enter your desired value.	FUND V1	Flex 1 V1 Flex 2 V1	Activity Lis	t (Do Not Change) Flex1 List (Do Not Change) TOTACT	New Request Close Select Viewpoint
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					UC_NSF_CODE	
					UC_PRIMARY_ACTIVITY	
					Tree Label	Parent4

This is where you will enter your desired value.

For testing purposes, enter A01000 into the search bar.

					🛆 Kristina Breckenri
UCROFC					New Request C
Natural Account V1	Account UCOP V1 ACTIVITY V1 E FUND V1	Flex 1 V1 Flex 2 V1	Activity List (Do	Not Change) Flex1 List (Do Not Change)	Select Viewpoint 👻
Q A01000 V ×	< > 4			TOTACT	
~ Activity		Description US		Properties Locations History	
A01000 D01000	Select A01000 under the search bar.	Total Activity		Q	15 Pro
				Name	TOTACT
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				End Date	
				Summary	Yes
				Enabled	Yes
				Allow Posting	No
				Allow Budgeting	No
				Description US	Total Activity
				Level	1
				Parent	
				Description	
				UC_DEPARTMENT_TYPE	General Campus - Other
				UC_NSF_CODE	
				UC_PRIMARY_ACTIVITY	

Select A01000 under the search bar.

Stop 9

BR					🛆 Kristina Breckenri
Request 7085 : Draft Interactive Request for UCROFC created by Kristina Breckenridge.	UCROFC - Reques	t 7085 Account UCOP V1 <u>ACTIVITY V1 :</u>	FUND V1 Flex 1 V1	Flex2 V1 Activity List (Do Not Chan > A01000	Submit Actions
	 Activity 	l ✓ Name	Description US	Properties Locations History	
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			School of Education General	Name	A01000
		✓ □ p01000	SOE Deans Office Dept	Start Date	
		♦ A01000	SOE Deans Office	End Date	
		♦ A01494	SOE Development Office	Summary	No
		♦ A01528	SOE F&A and ICR Funds	Enabled	Yes
		♦ A02521	SOE Deans Unallocated	Allow Posting	Yes
		► 🗅 DIV224	School of Education Academic	Allow Budgeting	Yes
		► 🗅 ORG11	Bourns College of Engineering	Description US	SOE Deans Office
		▶ 🗅 ORG12	College of Humanities Arts & Social Sciences	Level	5
		► 🗅 ORG13	School of Business	Parent	D01000
		▶ 🗅 ORG14	College of Natural & Agricultural Sciences	Description	
		► D ORG15	University Extension	UC_DEPARTMENT_TYPE	General Campus - Other
		▶ 1⊐ ORG16	University Library	UC_NSF_CODE	510 - Education
		▶ □ ORG18	Academic Senate	UC_PRIMARY_ACTIVITY	
		► 1 ORG19	Auxiliary Services	Tree Label	

Select New Request.

Step 9

Hover over the node name you want to move, and an arrow quad will appear over the node code.

Once you see that arrow quad that means you can click and drag the node wherever you want to move it.

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.

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.

If you move a department or division node, all child nodes under that department or division will be moved as well.

CR							û Kristina Breckenrie
Request 7085 : Draft Interactive Request for UCROFC created by Kristina Breckenridge.	VCROFC - Request	27085 Account UCOP V1 <u>ACTIVITY V1 :</u>	FUN	ID V1 Flex 1 V1 Flex	2 V1	Activity List (Do Not Chan A01000	When the properties table appears, you will e several fields below. Do not edit anything right now as this example is just for testing purposes.
	 Activity 	I ✓ Name		Description US	Ē.	Properties Locations History	example is just for testing purposes.
All Items :	A01000 D01000	 ➡ TOTACT ➡ ➡ ORGIO 		Total Activity School of Education		Q	Ne
				School of Education General		• Name	A01000
				SOE Deans Office Dept		Start Date	
		♦ A01000	÷	SOE Deans Office		End Date	
		© A01494	÷	SOE Development Office		Summary	No
		♦ A01528		SOE F&A and ICR Funds		Enabled	Yes
		♦ A02521		SOE Deans Unallocated		Allow Posting	Yes
		► DIV224		School of Education Academic		Allow Budgeting	Yes
		► 🗅 ORG11		Bourns College of Engineering		Description US	SOE Deans Office
		▶ 12 ORG12		College of Humanities Arts & Social Sciences		Level	5
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		▶ □ ORG14		College of Natural & Agricultural Sciences		Description	
		► □ ORG15		University Extension		UC_DEPARTMENT_TYPE	General Campus - Other
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		▶ □ ORG18		Academic Senate		UC_PRIMARY_ACTIVITY	
		► 1 ORG19		Auxiliary Services		Tree Label	

When the properties table appears, you will edit several fields below.

Do not edit anything right now as this example is just for testing purposes.

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Request 7085 :: Draft Interactiv Request for UCROFC created by Kristina Breckenridge.	e UCROFC - Reques	Account UCOP V1	-	lex2 V1 Activity List (I + A01000	Submit Actions	•
0 0 0 0	~ Activity	1 🗸 Name	Description US	Properties Locations	History	
All Items :	A01000 D01000		Total Activity School of Education School of Education General SOE Deans Office Dept	Q. * Name Start Date		15 Pro
		¢ A01000	SOE Deans Office	End Date		
		© A01494	SOE Development Office	Summary		No
		♦ A01528 ♦ A02521	SOE F&A and ICR Funds SOE Deans Unallocated	Allow Decting	Add Description . As part of moving a department via a re-	Yes Yes
		D DIV224 DI ORG11	School of Education Academic Bourns College of Engineering	Allow Budgeting	organization, we need to provide UCPath the department default FAU (Activity/Function) and the department location code if they are changing.	Yes
		D ORG12	College of Humanities Arts & Social Sciences	faund.	All default FAUs use fund 69993. All existing	5
		D ORGIS	School of Business	- and a	departments have a current default FAU, it can be found at:	D01000
		C ORG14 D ORG15	College of Natural & Agricultural Sciences University Extension		https://o365ucr.sharepoint.com/:f:/s/BFS/BSA/EkhC e=9F4GW7	
		 C1 ORG15 C1 ORG16 	University Extension	UC_DEPARTMEN	We ask units who are moving departments to check	- Other
		CI ORG18	Academic Senate		this list and confirm if the default FAU is still correct or if it needs to be updated. If no change is	
		C1 ORG19 D ORG20	Auxiliary Services		required then in the Description node you will add "No Change to DFAU".	
		Li ORGZU	sundricentor			

Add the **default FAU and location code** to the **Description**.

As an example, "A01000/40 and 4034018" or "No change to DFAU or Location."

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://o365ucr.sharepoint.com/:f:/s/BFS/BSA/EkhOfJX_s19EhSy1_tyyMNYBJhFHGb3v51ApAUmnKdS9xw?

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/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.

If no change is required for the location code, in the Description Node you will add "No change to location".

R					🛆 Kristina Brecken
Request 5953 : Draft Interactive	UCROFC - Reques	t 5953			Submit Actions *
Request for UCROFC created by Kristina Breckenridge.	Natural Account V1	Account UCOP V1 ACTIVITY V1 :	FUND V1 Flex 1 V1	Flex2 V1 Activity Lis Step 1 of 1	7
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0 0 0	~ Activity	1 V Name	Description US	Properties Locations	
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			School of Education General	= Name	A01000
			SOE Deans Office Dept	Start Date	
		♦ A01000	SOE Deans Office	End Date	
		¢ A01494	SOE Development Office	Summary	No
		♦ A01528	SOE F&A and ICR Funds	Enabled	Yes
		♦ A02521	SOE Deans Unallocated	Allow Posting	Yes
		▶ □ DIV224	School of Education Academic	Allow Budgeting	Yes
		► D ORG11	Bourns College of Engineering	* Description US	SOE Deans Office
		El orgiz	College of Humanities Arts & Social Sciences	Level	5
		D ORG13	School of Business	Parent	D01000
		► 1 ORG14	College of Natural & Agricultural Sciences	Description	
		► D ORG15	University Extension	UC_DEPARTMENT_TYPE	General Campus - Other
		▶ 🖾 ORG16	University Library	UC_NSF_CODE	510 - Education
		Ci org18	Academic Senate	UC_PRIMARY_ACTIVITY	
		► 12 ORG19	Auxiliary Services	Tree Label	
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The Submit button becomes available to click on (bold) after you make changes to the properties table or name.

This is an example for training, so **DO NOT HIT SUBMIT**.



Thank you for completing this Oracle Guided Learning Tutorial!