

Finance New FOP System: Organization Code Requests and Financial Manager Changes

February 2016
Texas Tech University Health Sciences Center
Budget Office

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Finance New FOP System

The Finance New FOP web application was created to facilitate financial manager changes and organization code requests. This system will allow users to update the fund code financial manager and the organization code financial manager. It will also allow users to request new organization codes, change the name of an organization code or deactivate an organization code.

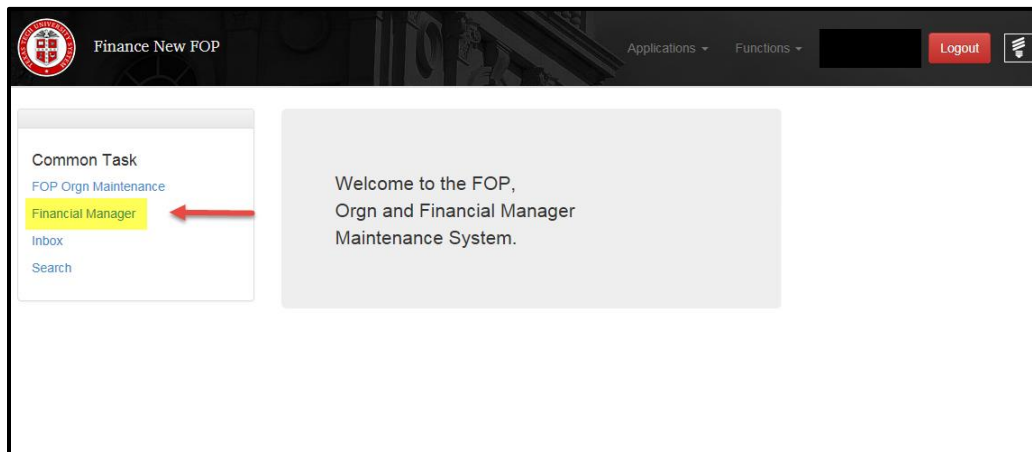
The system is located at: <http://newfop.app.texastech.edu>

Any questions about the Finance New FOP system can be directed to the Budget Office at 806-743-7421 or hscbud@ttuhsc.edu.

Financial Manager Change

Financial managers are assigned to both the fund code and organization code. Sometimes these are referred to as Fund Managers or Orgn Managers. The Finance New FOP web application gives users the ability to request a change to both the fund financial manager and organization financial manager.

The financial manager can be changed by choosing the Financial Manager link from the home page of the web application.



On the Request Financial Manager Change screen, choose the Chart of Accounts. For the Current Financial Manager begin typing the name of the current fund or organization manager. The New Financial Manager will be the employee who should become the fund or organization manager.

Note: If the current financial manager has already terminated their name may not display in the Current Financial Manager box. In this case, you will need to email your changes. Email fsm@ttuhsc.edu for fund financial manager changes. Email hscbud@ttuhsc.edu for organization financial manager changes.


Finance New FOP
Applications ▾
Functions ▾

Request Financial Manager Change

Chart:

Current Financial Manager:

New Financial Manager:

The system will display a list of fund codes and organization codes associated with the Current Financial Manager.

To make changes to the financial manager, click the box next to the fund or organization that you would like to update. The Select All link at the top of each section can also be used to select all fund or organization codes displayed.


Finance New FOP
Applications ▾
Functions ▾
Lesley W

Request Financial Manager Change

Chart:

Current Financial Manager:

New Financial Manager:

Funds Currently Managed by Lesley Wilmeth

Select All	Fund Code	Fund Title
☐	101014	Budget Office
☒	101062	Human Resources
☐	151007	Wellness Center SON
☐	211399	FQHC GY16

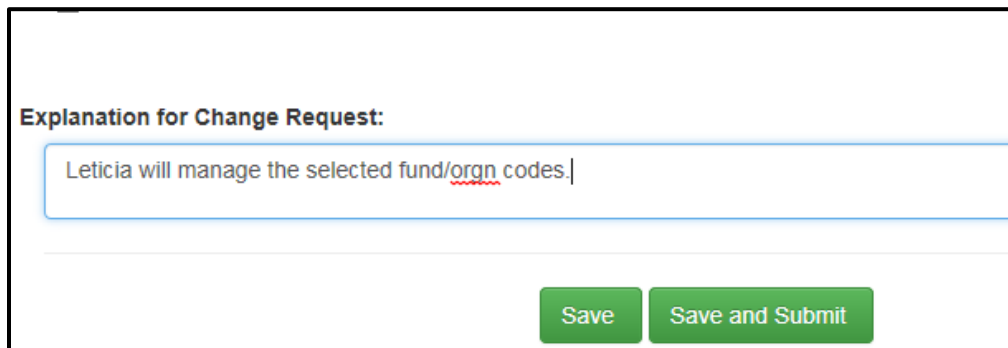
Click Select All to change all fund or organization codes

Organizations Currently Managed by Lesley Wilmeth

Select All	Orgn Code	Orgn Title
☐	101102	Capital Campaign Lbk
☒		More Test Budget
☒		Fac Info Institutional Space Lbk
☐	201888	FC Comm Svcs Elp
☐	351841	NIP TEST Name Change

Check individual boxes to select a particular fund or orgn

Next, scroll to the bottom of the screen, type in an explanation of the change, then click ‘Save and Submit’.



The screenshot shows a web form titled "Explanation for Change Request:". Below the title is a text input field containing the text "Leticia will manage the selected fund/orgn codes." with a red squiggly underline under the word "orgn". At the bottom right of the form are two green buttons: "Save" and "Save and Submit".

The current and future financial managers will be required to approve the action above. Finance Systems Management will also approve the fund financial manager change. The Budget Office will approve the organization financial manager change.

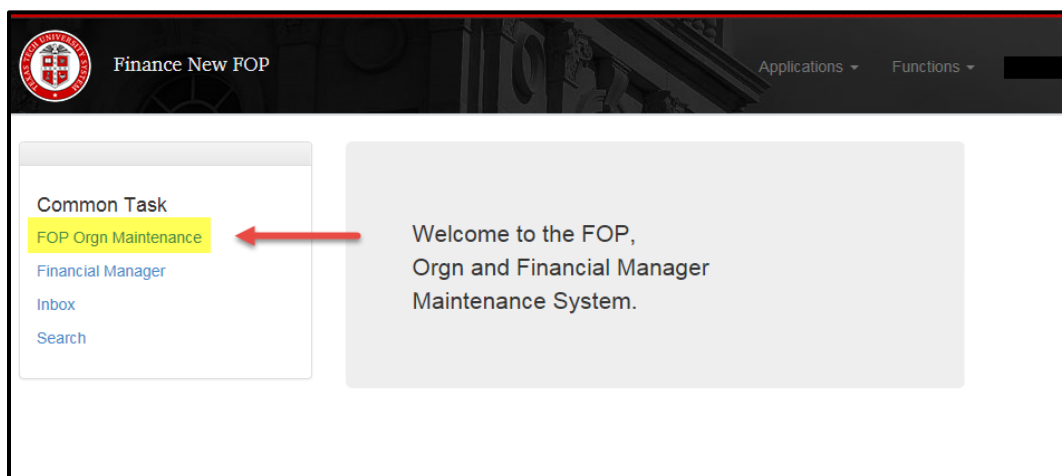
When all approvals have been granted, the originator will receive an email confirming that the changes have taken place.

Organization Code Request

The Finance New FOP system can be used to:

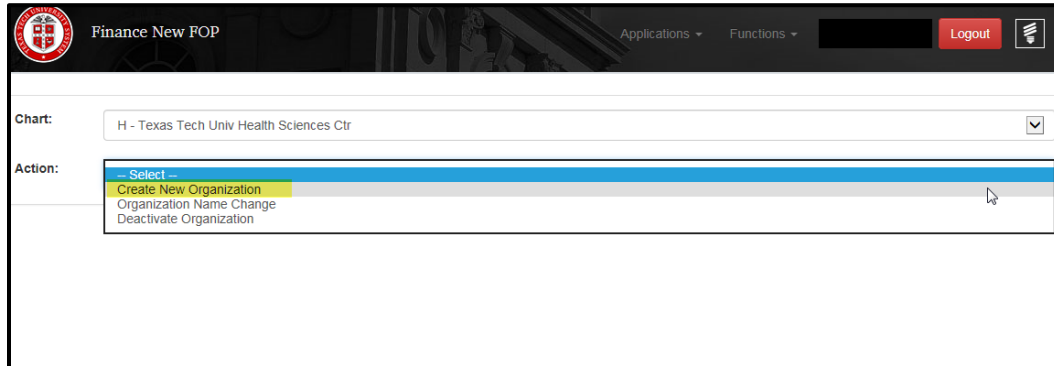
- Request a new organization code
- Change the name of an existing organization code
- Deactivate an existing organization code

This is done by choosing the FOP Orgn Maintenance link on the Finance New FOP home page.



Create New Organization

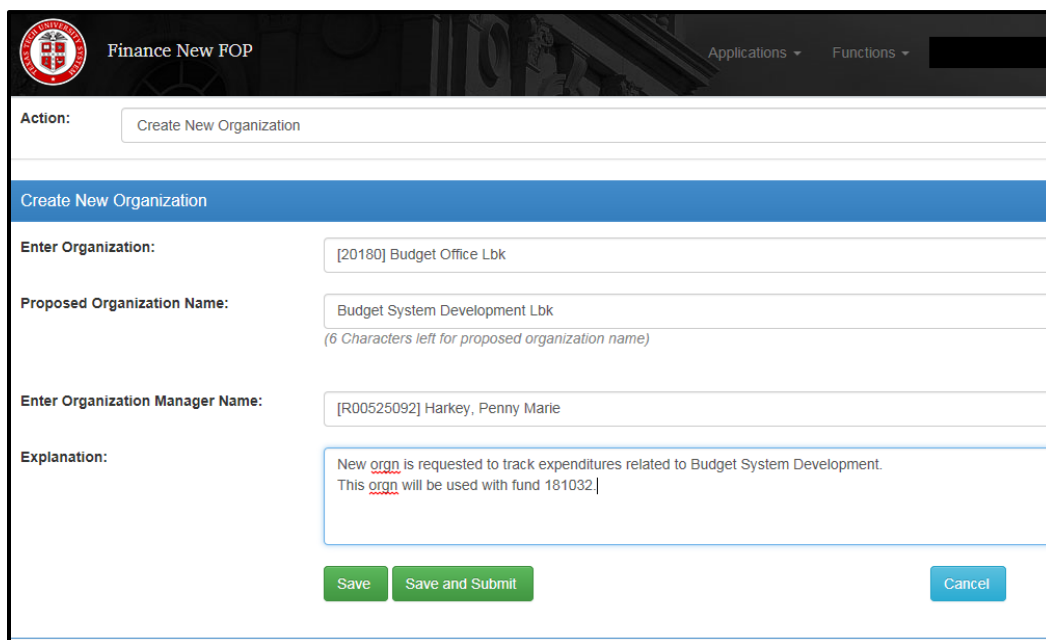
From the FOP Orgn Maintenance screen, select the Chart of Accounts. Choose Create New Organization for the action.



The screenshot shows the 'Finance New FOP' interface. At the top, there is a header with the university logo, the title 'Finance New FOP', and navigation links for 'Applications' and 'Functions'. A 'Logout' button is also present. Below the header, there is a 'Chart:' dropdown menu currently set to 'H - Texas Tech Univ Health Sciences Ctr'. Below that, an 'Action:' dropdown menu is open, showing four options: 'Select...', 'Create New Organization' (highlighted in yellow), 'Organization Name Change', and 'Deactivate Organization'.

Complete the following:

- Enter Organization: Type in the department name. As you type the system will begin to find all department level organization codes with this name. Select your organization code.
- Proposed Organization: Input the name for the new organization code that is being requested.
- Enter Organization Manager: Input the name of the employee who will be the organization manager.
- Explanation: Provide information about the new organization code. Why it is being requested? What fund code will it be used with?
- Click Save and Submit to request the new organization code



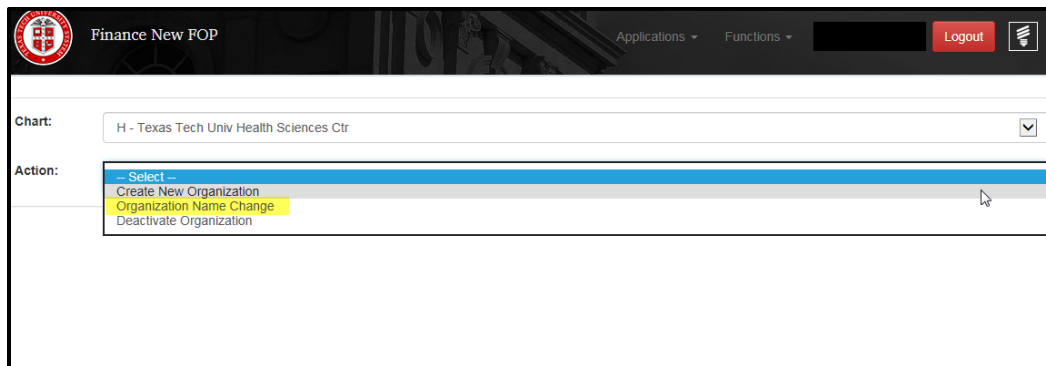
The screenshot shows the 'Create New Organization' form in the 'Finance New FOP' interface. The 'Action:' dropdown is set to 'Create New Organization'. The form has a blue header bar with the title 'Create New Organization'. Below this, there are four main sections: 'Enter Organization:' with a text input field containing '[20180] Budget Office Lbk'; 'Proposed Organization Name:' with a text input field containing 'Budget System Development Lbk' and a note '(6 Characters left for proposed organization name)'; 'Enter Organization Manager Name:' with a text input field containing '[R00525092] Harkey, Penny Marie'; and 'Explanation:' with a text area containing 'New orgn is requested to track expenditures related to Budget System Development. This orgn will be used with fund 181032|'. At the bottom of the form, there are three buttons: 'Save', 'Save and Submit', and 'Cancel'.

Upon submission the request will be sent to the Budget Office for review and approval. When the approval has been granted and the new organization code has been created the system will send an email to the originator with the new organization code.

Organization Name Change

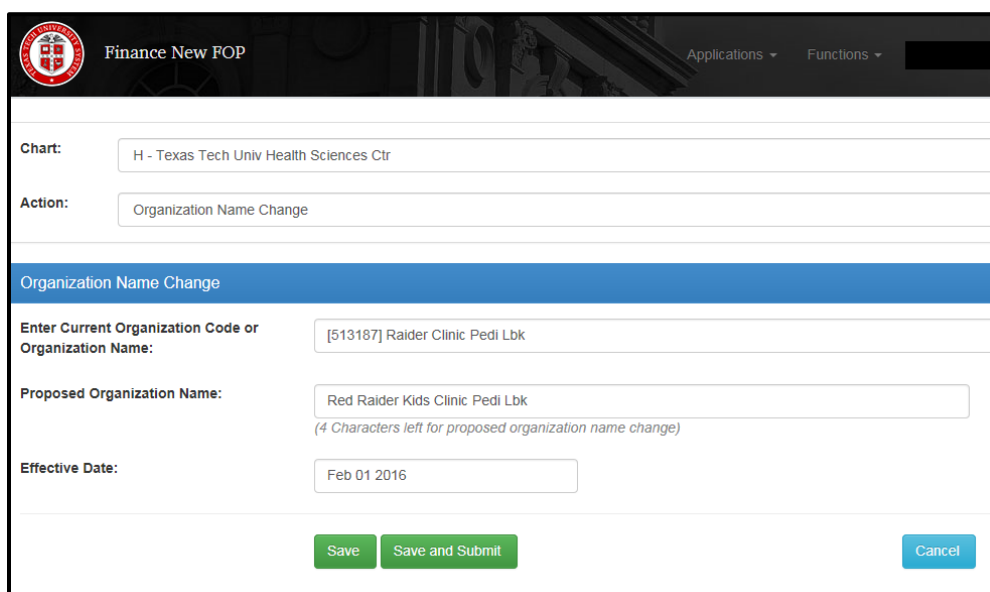
The Finance New FOP system can also be used to change the name of an existing active organization code.

From the FOP Orgn Maintenance screen, select the Chart of Accounts. Choose Organization Name Change for the action.



Complete the following:

- Enter Current Organization Code or Organization Name: Begin typing either the organization code or name of the organization to change.
- Proposed Organization Name: Input the proposed new organization name.
- Effective Date: Select the date the new organization name should be effective. This will usually be the current date.
- Click Save and Submit to request the name change

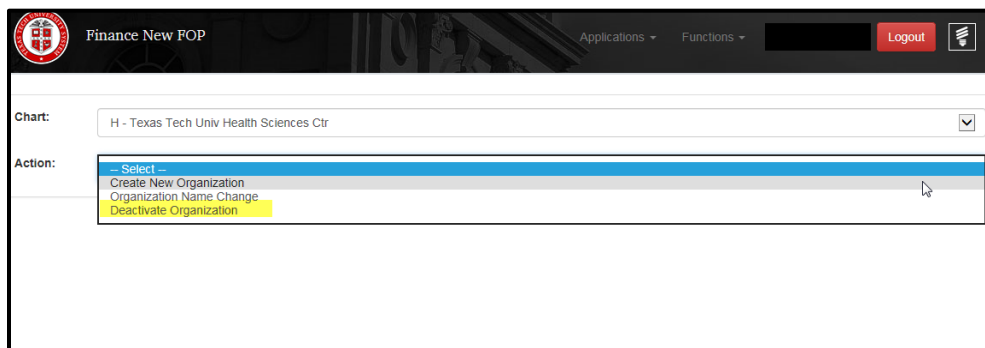


Upon submission the request will be sent to the organization manager for approval. Then the request will go to the Budget Office for review and approval. When all approvals have been granted and the organization code has been updated, the system will send an email to the originator informing them the action has been completed.

Deactivate Organization

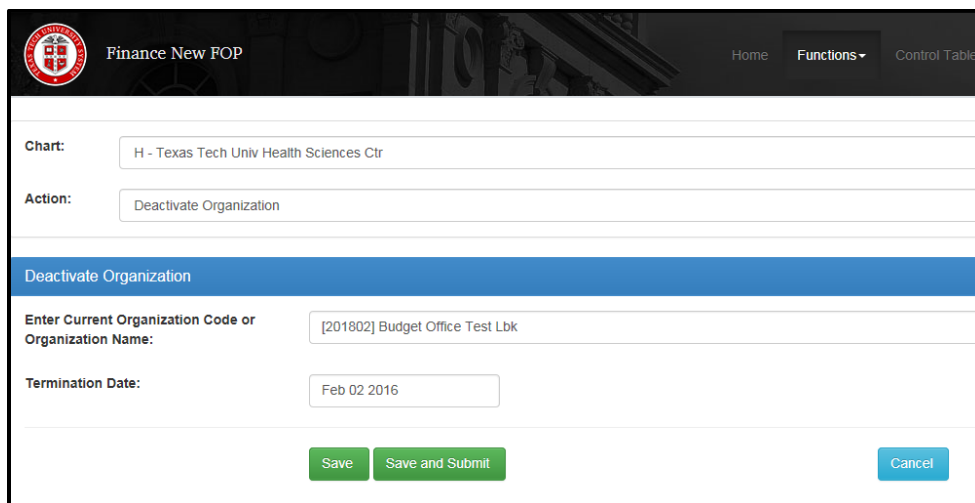
When an organization code is no longer needed the organization code can be deactivated using the Finance New FOP system.

From the FOP Orgn Maintenance screen select the Chart of Accounts. Choose Deactivate Organization for the action.



The screenshot shows the 'Finance New FOP' interface. At the top, there is a header with the university logo, 'Finance New FOP', and navigation links for 'Applications', 'Functions', and a 'Logout' button. Below the header, the 'Chart' field is set to 'H - Texas Tech Univ Health Sciences Ctr'. The 'Action' dropdown menu is open, showing three options: '-- Select --', 'Create New Organization', and 'Deactivate Organization'. The 'Deactivate Organization' option is highlighted in yellow.

Enter the name of the organization that should be deactivated and the date of deactivation. Then click Save and Submit.



The screenshot shows the 'Deactivate Organization' form in the 'Finance New FOP' system. The 'Chart' field is set to 'H - Texas Tech Univ Health Sciences Ctr'. The 'Action' dropdown menu is set to 'Deactivate Organization'. Below the form, there is a section titled 'Deactivate Organization' with two input fields: 'Enter Current Organization Code or Organization Name' (containing '[201802] Budget Office Test Lbk') and 'Termination Date' (containing 'Feb 02 2016'). At the bottom, there are three buttons: 'Save', 'Save and Submit', and 'Cancel'.

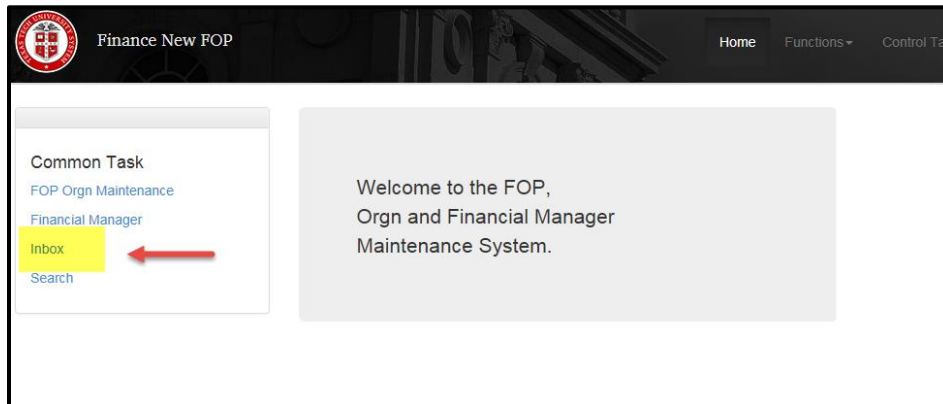
This request will need approval from the organization manager and the Budget Office.

When the request has been approved, the originator will receive an email informing them that the organization code has been deactivated.

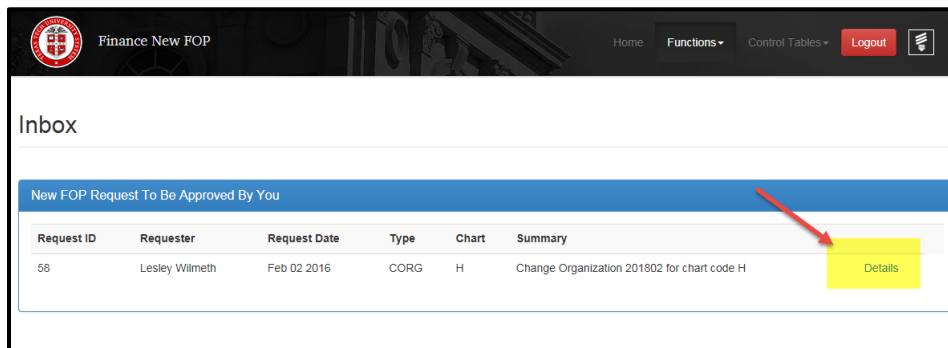
Inbox (Approvals)

Organization managers will receive emails from the Finance New FOP system when a request needs their approval. The email will take the organization manager to the Inbox.

The Inbox can also be accessed from within the Finance New FOP system by selecting the Inbox link on the home page.



The Inbox screen will list any actions waiting for the organization manager's approval. Click the Details link to view the request.



From the request detail screen, the organization manager can scroll through the document and either Approve or Reject the request. Comments are required on any rejection of a request.

Effective Date: Feb 02 2016

Approval Route: Orgn Mgr TTUHSC Budget Office Initiated On: Feb 2, 2016

Status	Started	Activity On	Approval Group	Approvers
Pending	2/2/16 2:05 PM		Orgn Mgr	Lesley Wilmeth
			TTUHSC Budget Office	Lesley Wilmeth , Gina Stockman , Leticia Almaguer

Approver Notes:

(Note: Rejection requires notes.)

Save Change
Approve
Reject
Close

Search

The search link on the Finance New FOP home page can be used to find a submitted request. Complete the following:

- Chart Code: Choose the Chart of Accounts
- Request Type:
 - New FOP – organization code requests
 - Financial Manager - fund or organization manager changes
- Status:
 - Approved – approved requests only
 - Error – requests with an error
 - New – requests submitted within the last 7 calendar days
 - Rejected – rejected requests only
 - Submitted – requests that have been submitted, but not approved or rejected
 - All – all requests regardless of status



Finance New FOP

Home
Functions

Chart Code:

H - Texas Tech Univ Health Sciences Ctr

Request Type:

☒ New FOP
☐ Financial Manager

Status:

☐ Approved
☐ Error
☐ New
☐ Rejected
☐ Submitted
☒ All

The system will display requests matching the parameters chosen. Click the Details link to view the request. The Delete link will delete a request that has not been approved.

Request ID	Requester	Request Date	Type	Summary	Approval Waiting On	Status	
58	Lesley Wilmeth	Feb 02 2016	CORG	Change Organization 201802 for chart code H		R	Details Delete
55	Lesley Wilmeth	Feb 02 2016	NORG	Create New Organization Pred Orgn 35160 for chart code H		A	Details
48	Lesley Wilmeth	Jan 29 2016	CORG	Change Organization 351606 for chart code H		A	Details
44	Lesley Wilmeth	Jan 28 2016	NORG	Create New Organization Pred Orgn 54530 for chart code H		A	Details