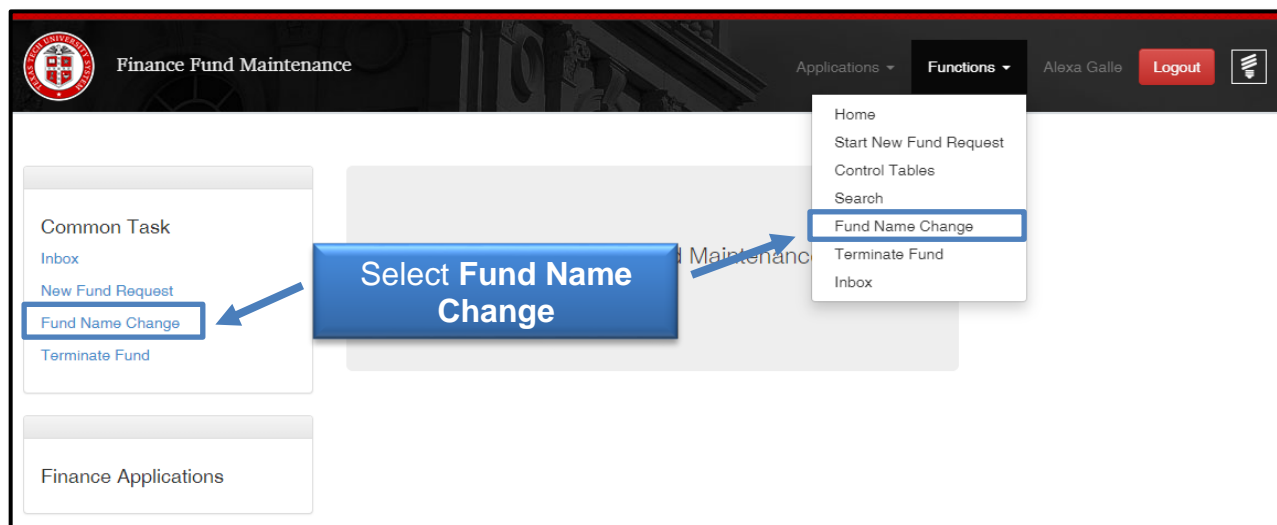


The Fund Name Change module of the Fund Maintenance System allows departments to submit name changes for existing funds. After review and approval, the system will update Banner with the new fund name.

The Fund Maintenance system can be accessed from the WebRaider portal, F&A Work Tools tab, Business Affairs section, under Accounting Services.

## Fund Name Change Process

To begin a Fund Name Change request, select **Fund Name Change** under Common Task on the left side of the web page or from the drop-down list under Functions.



The system auto populates information about you and your department in the User Information section. This information is based on information from Banner HR data. A red asterisk appears next to all required fields.

The Chart Code is auto populated from the drop-down menu based on your User Information.

You are able to type the current **fund name** or **fund number** in the Enter Current Fund Code or Fund Name field to initiate the search.

Enter the **Proposed Fund Short Name**. Keep in mind that this field is limited to 35 characters.

The Effective Date will be auto populated to today's date but may be changed to a future date. A date prior to today's date may not be used.

Enter the **Justification for the Request**.

# Fund Name Change Training

The screenshot shows the 'Finance Fund Maintenance' interface. At the top, there is a header with the university logo and user information: 'User Name: Alexandra Galle', 'Tech ID', 'Email Address: alexandra.galle@ttuhsc.edu', 'Home Dept: 201193 Finance Systems Mgmt Lbk', and 'Work Phone (806) 743-7452'. The main section is titled 'Fund Name Change' and contains the following fields:

- Chart Code:** H - Texas Tech Univ Health Sciences Ctr
- Enter Current Fund Code or Fund Name:** [181388] Finance Systems Mgmt
- Proposed Fund Short Name:** Finance Systems Management (9 Characters left for proposed fund name change)
- Effective Date:** Jun 11 2020
- Justification for the Request:** Justification for the request goes here (960 Characters left for justification)

Callout boxes with arrows point to the 'Enter Current Fund Code or Fund Name', 'Enter Proposed Fund Short Name', and 'Enter Justification' fields. At the bottom of the form, there are buttons for 'Attachments', 'Comments', 'Save', 'Save & Submit', and 'Cancel'. A note states: 'Note: Attachments & Comments will be enabled after request has been saved.'

You are able to click either the **Save** button (saves your work) or the **Save & Submit** button (sends your request to the approval process).

When the **Save** button is clicked, the system will notify you that your request was successfully saved at the top right corner and redirect you to the Search page.

When the **Save & Submit** button is clicked, the system will notify you that your request was successfully submitted at the top right corner and redirect you to the Search page. If any required fields are not completed, the system will remain on the same page and will not submit the request to approvals. All required fields must be completed before clicking **Save & Submit**.

When the Fund Name Change request is submitted, the request will first be routed to the Fund Manager for approval. An email will be sent to the Fund Manager notifying them that a Fund Name Change request is waiting for their approval. A link to the request will be provided in the email.

## Attachments and Comments

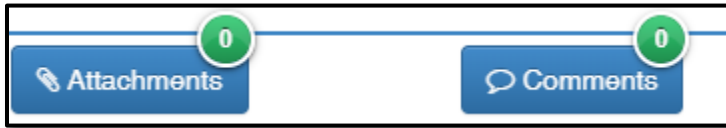
An Attachments button and a Comments button will appear at the bottom left corner after clicking the **Save** button.

After the Attachments box opens, click the **Choose File** button. Select the file you wish to upload and click **Upload Attachment**. If you accidentally upload an incorrect file, you are able to delete it by clicking on the trash can icon under Actions. Once the attachment is added, click **Close**.

# Fund Name Change Training

After the Comments box opens, click the **Add** button to include additional information about the request. Click the plus sign to add the comment or the minus sign to delete the comment. Once the Comment is added, click **Close**.

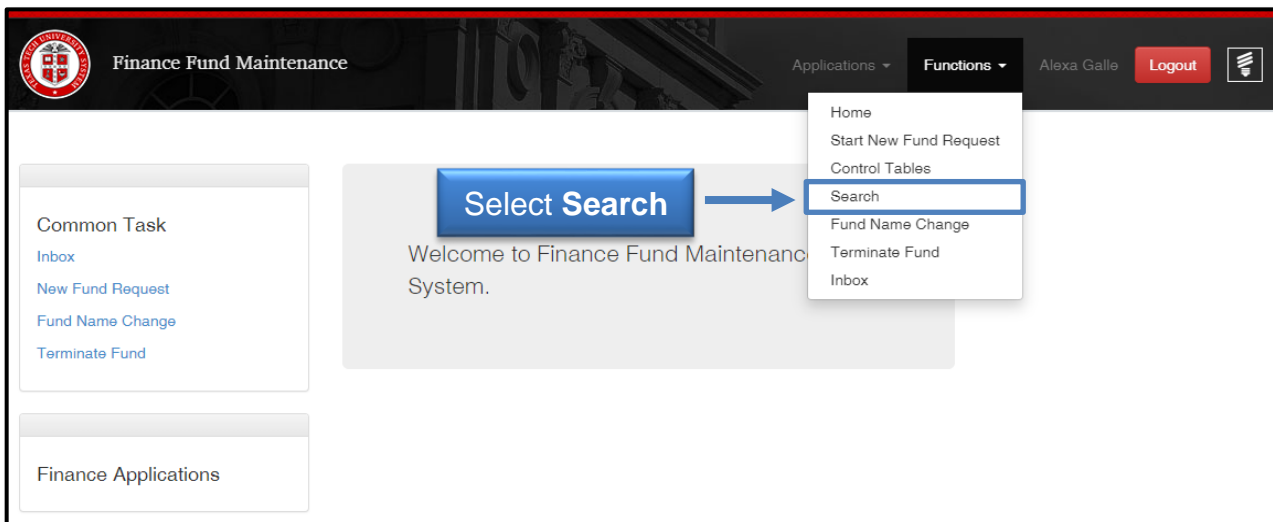
The green bubble icons on each button indicates how many attachments or comments the request has attached to it.



Attachments and comments may be added until the request has received final approval.

## My Requests

To view your Fund Name Change requests, click **Search** in the drop-down list under Functions at the top of the page.



Search will direct you to My Requests, which is a list of requests you have initiated and saved or routed to approvals. Each request will provide information regarding the Request Number, Submitter, Request Type, Activity Date, Chart, Fund Class, Fund Code, Fund Name, and Status.

If the request needs to be submitted for approval, the Status will indicate In Process. Click **Review** to view the Fund Name Change form. Then click **Save & Submit** to begin the approval process.

# Fund Name Change Training

Search

Click My Requests

What do you want to do?

My Requests ✓  
 Review requests needing my approval  
 Search

Status of Request

Click Review

Request #	Submitter	Request Type	Activity Date	Chart	Fund Class	Fund Code	Fund Name	Status	Review
6181	Alexandra Galle	New Fund	Jun 03 2020	H	18Z		Student Test	In Approvals	Review
6096	Alexandra Galle	New Fund	May 21 2020	H	18		Research Division Test	In Approvals	Review
6095	Alexandra Galle	New Fund	May 21 2020	H	10		President Division Test	In Approvals	Review
6089	Alexandra Galle	New Fund	May 20 2020	H	18		This is a Test	In Approvals	Review

When the Status on a request indicates In Approvals, the request can be reviewed but no changes may be made.

Users can view the approval route of the request by scrolling to the bottom of the request form. A Fund Name Change request is routed to the Fund Manager, Accounting Services, and Finance Systems Management for final review and processing.

Approval Route: Initiated On: Jun 11, 2020

Fund Financial Manager — HSC FM Acct 3 — HSC FSM

Status	Started	Activity On	Approval Group	Approver
➔ 1	6/11/20 8:58 AM		Fund Financial Manager	Carole Wardroup
2			HSC FM Acct 3	Jon Sorensen, Suzanne Dean
3			HSC FSM	Alexandra Galle, Carole Wardroup

## Review Requests Needing Approval

To look for requests needing your approval, click **Search** in the drop-down list under Functions at the top of the page.

Finance Fund Maintenance

Applications ▾ Functions ▾ Alexa Galle Logout

Home  
Start New Fund Request  
Control Tables  
**Search**  
Fund Name Change  
Terminate Fund  
Inbox

Select Search

Welcome to Finance Fund Maintenance System.

Common Task

- Inbox
- New Fund Request
- Fund Name Change
- Terminate Fund

Finance Applications

# Fund Name Change Training

Select **Review requests needing my approval**. Requests will be sorted by Request Number for all Fund Maintenance System requests. Users may view a request by selecting **Review**.

Search

Click Review requests needing my approval

What do you want to do?  My Requests  Review requests needing my approval ✓  Search

Click Review

Request #	Submitter	Request Type	Activity Date	Chart	Fund Class	Fund Code	Fund Name	Status	
6197	Alexandra Galle	Fund Name Change	Jun 11 2020	H	18	181388	Finance Systems Management	In Approvals	Review
6089	Alexandra Galle	New Fund	May 20 2020	H	18		This is a Test	In Approvals	Review

After reviewing the Fund Name Change request, either click **Approve** or **Reject**. If the Reject button is selected, a reason must be entered in the Approver Notes before processing the rejection.

Approval Route: Fund Financial Manager - HSC FM Acct 3 - HSC FSM

Initiated On: Jun 11, 2020

Status	Started	Activity On	Approval Group	Approvers
✓		9:03 AM	Fund Financial Manager	Carole Wardroup
✓		9:03 AM	HSC FM Acct 3	Jon Sorensen
→			HSC FSM	Alexandra Galle, Carole Wardroup

Enter Approver Notes for Rejection

Approver Notes:

Click Approve

(Note: Rejection requires notes.)

Approve Reject Click Reject

## Search

By selecting the **Search** button, all Fund Maintenance System requests for the past two months will appear. The required search dates may be changed by entering new information in the Start Date field or End Date field.

If the search needs to be narrowed beyond the dates and Chart, select **Another Filter**. A drop-down menu will appear allowing the search to be filtered by Request Number, Submitter, Chart, Fund Class, Fund Code, Fund Name, Status, and Request Type.

Once a filter has been selected for a search, click **Apply Filter**. To remove a filter from a search, click **Clear Filter**.

# Fund Name Change Training

Search

What do you want to do?  My Requests  Review requests needing my approval  Search ✓

**Click Search** →

Start Date: Apr 12 2020 \*  
End Date: Jun 11 2020 \*

**Change Search Dates** ←

Chart: [v] H [v]

**Select Another Filter** →

Request #	Submitter	Request Type	Activity Date	Chart	Fund Class	Fund Code	Fund Name	Status
6197	Alexandra Galle	Fund Name Change				181388	Finance Systems Management	In Approvals <a href="#">Review</a>
6191	Carole Wardroup	New Fund					SF Student Services Fee Mid Test	In Approvals <a href="#">Review</a>
6181	Alexandra Galle	New Fund	Jun 03 2020	H	18Z		Student Test	In Approvals <a href="#">Review</a>

**Click Apply Filter** ↑

If you have policy questions, please contact Accounting Services at [hscacc@ttuhsc.edu](mailto:hscacc@ttuhsc.edu).

If you have questions about the system, please contact Finance Systems Management at [fsm@ttuhsc.edu](mailto:fsm@ttuhsc.edu).