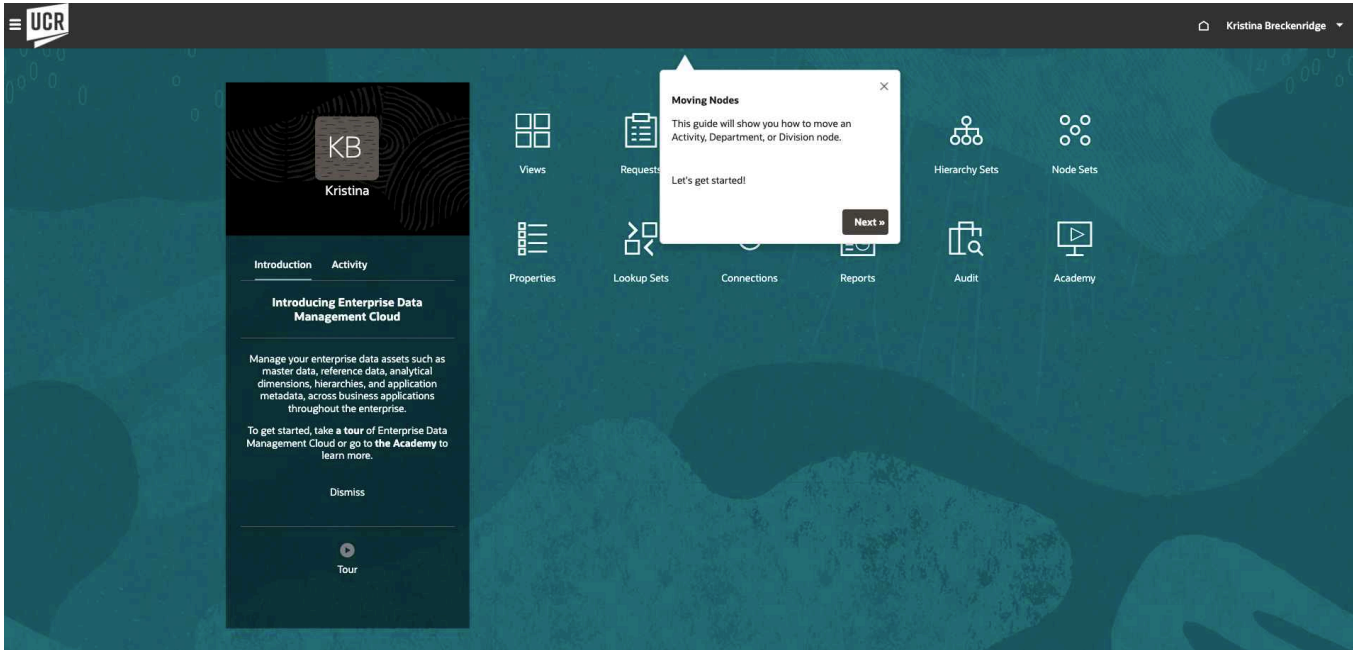


Moving an Activity/Dept/Devison Node

Step 1



Moving Nodes

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

Let's get started!

Step 2

The screenshot shows the 'Views' page in the UCR system. The top navigation bar includes icons for Views, Requests, Applications, Node Types, Hierarchy Sets, Node Sets, Properties, Lookup Sets, Connections, Reports, Audit, and Academy. The user is identified as Kristina Breckenridge. The main content area displays a table of views:

Name and Description	Created	Last Modified	Actions
Account Split View GL - EPM (Do Not Use For Changes or New Requests) Account View for GL and EPM	JV Jesus Villavicencio 9/8/2022	SB Shannon Burndred 4/10/2023	
Activity Split View GL - EPM (Do Not Use For Changes or New Requests) Activity View for GL and EPM	JV Jesus Villavicencio 9/8/2022	SB Shannon Burndred 4/10/2023	
Flex1 Split View GL - EPM (Do Not Use For Changes or New Requests) Flex1 View for GL and EPM	JV Jesus Villavicencio 9/8/2022	SB Shannon Burndred 4/10/2023	
Flex2 Split View GL - EPM (Do Not Use For Changes or New Requests) Flex2 View for GL and EPM	JV Jesus Villavicencio 9/8/2022	SB Shannon Burndred 4/10/2023	
Fund Split View GL - EPM (Do Not Use For Changes or New Requests) Fund View for GL and EPM	JV Jesus Villavicencio 9/8/2022	SB Shannon Burndred 4/10/2023	
UCROFC UCROFC Default View	JV Jesus Villavicencio 8/30/2022	JV Jesus Villavicencio 8/30/2022	

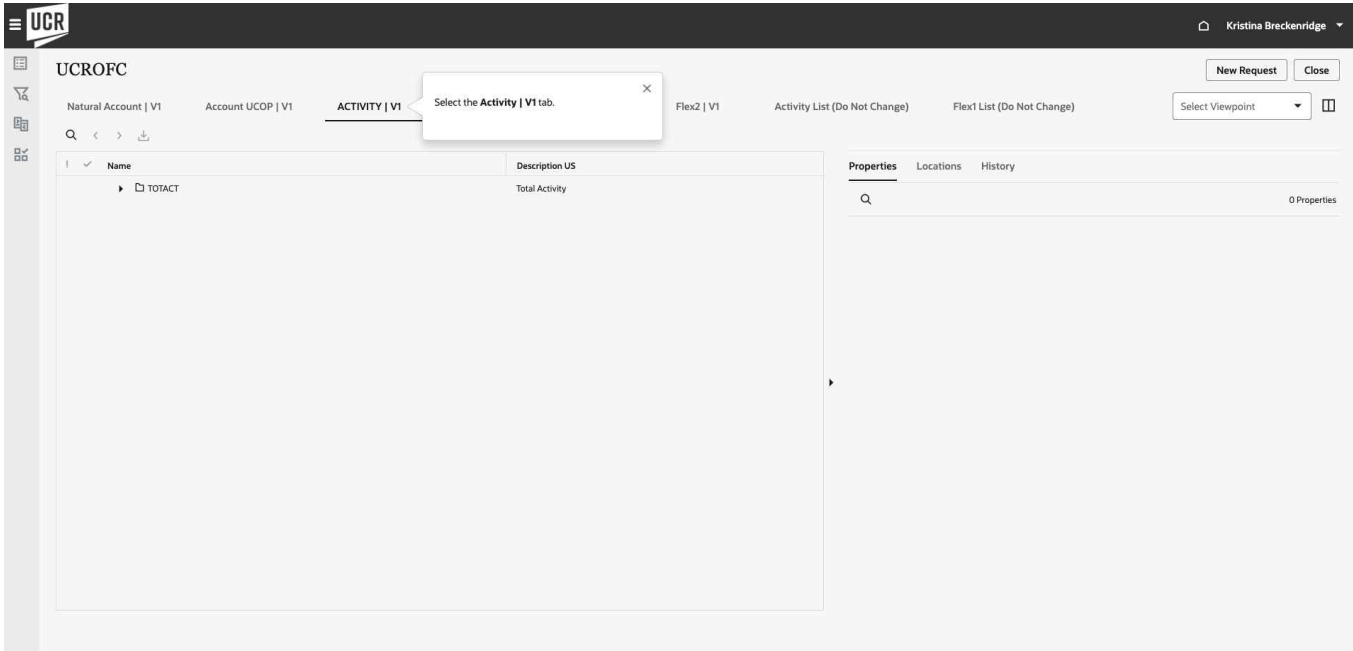
Select the **Views** card.

Step 3

The screenshot shows the 'UCROFC' page in the UCR system. The breadcrumb trail is: **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). A tooltip points to the 'UCROFC' link in the breadcrumb trail.

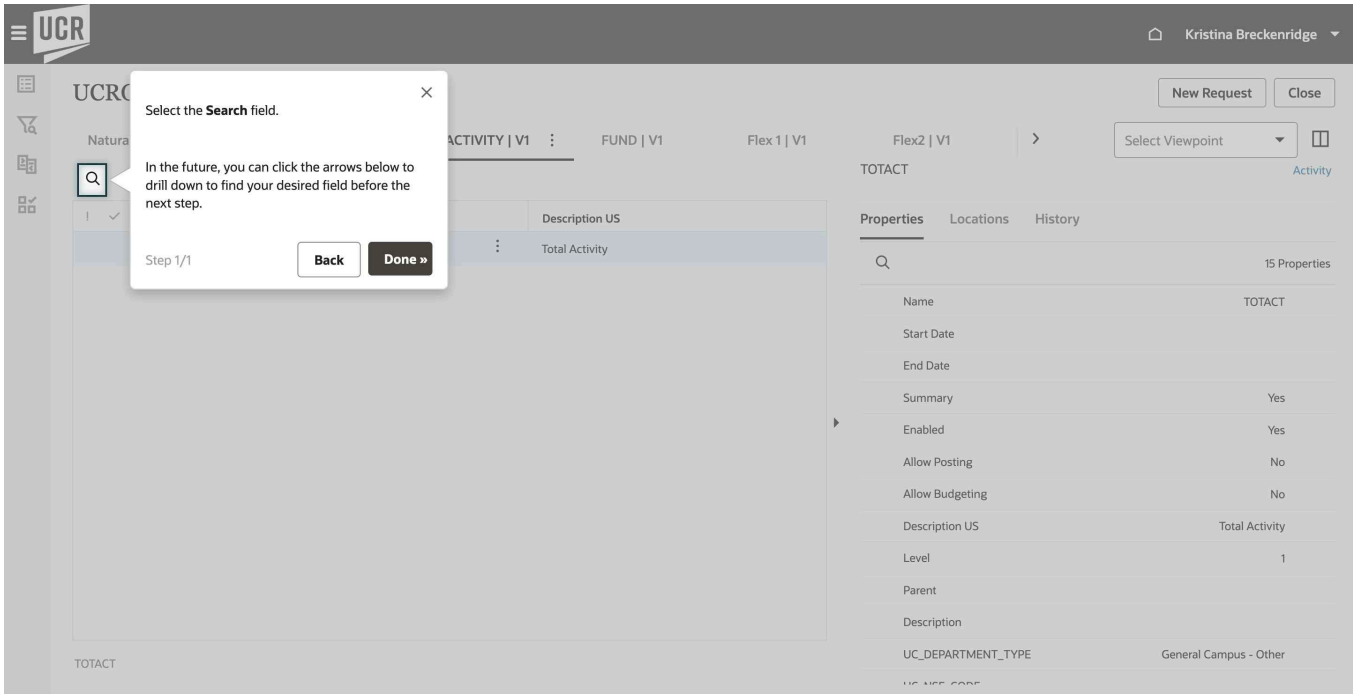
Click the **UCROFC** link.

Step 4



Select the **Activity | V1** tab.

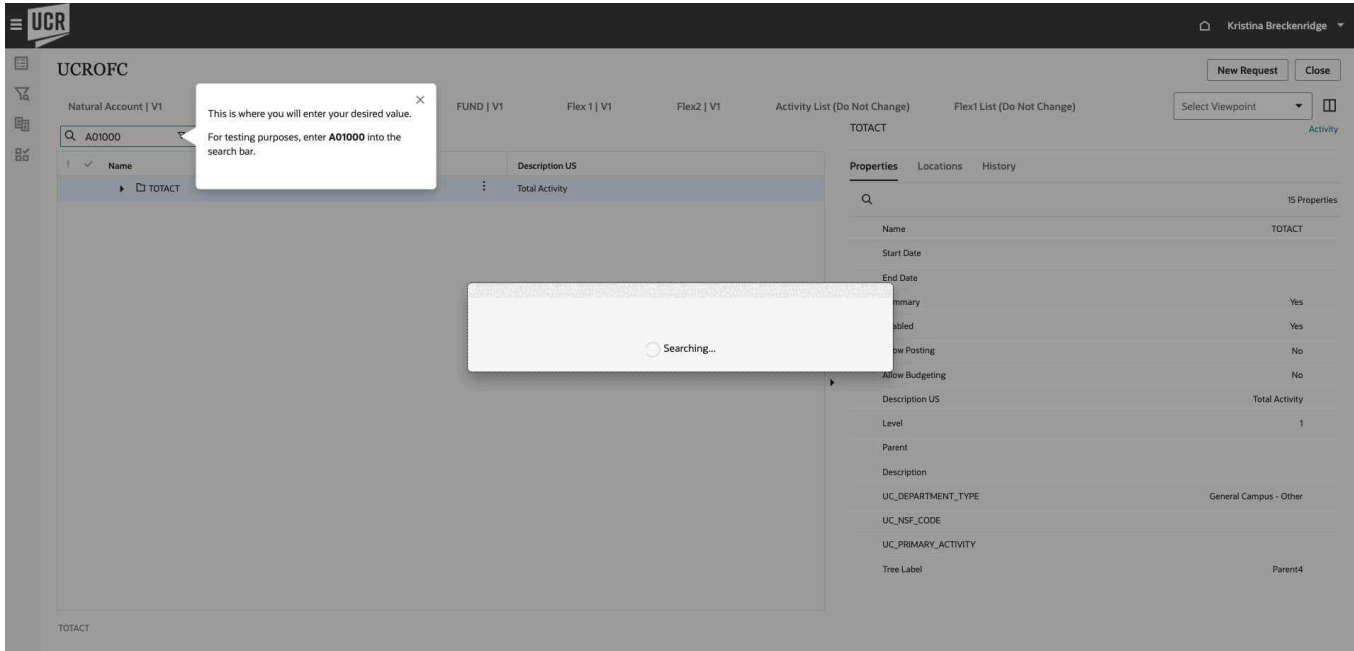
Step 5



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.

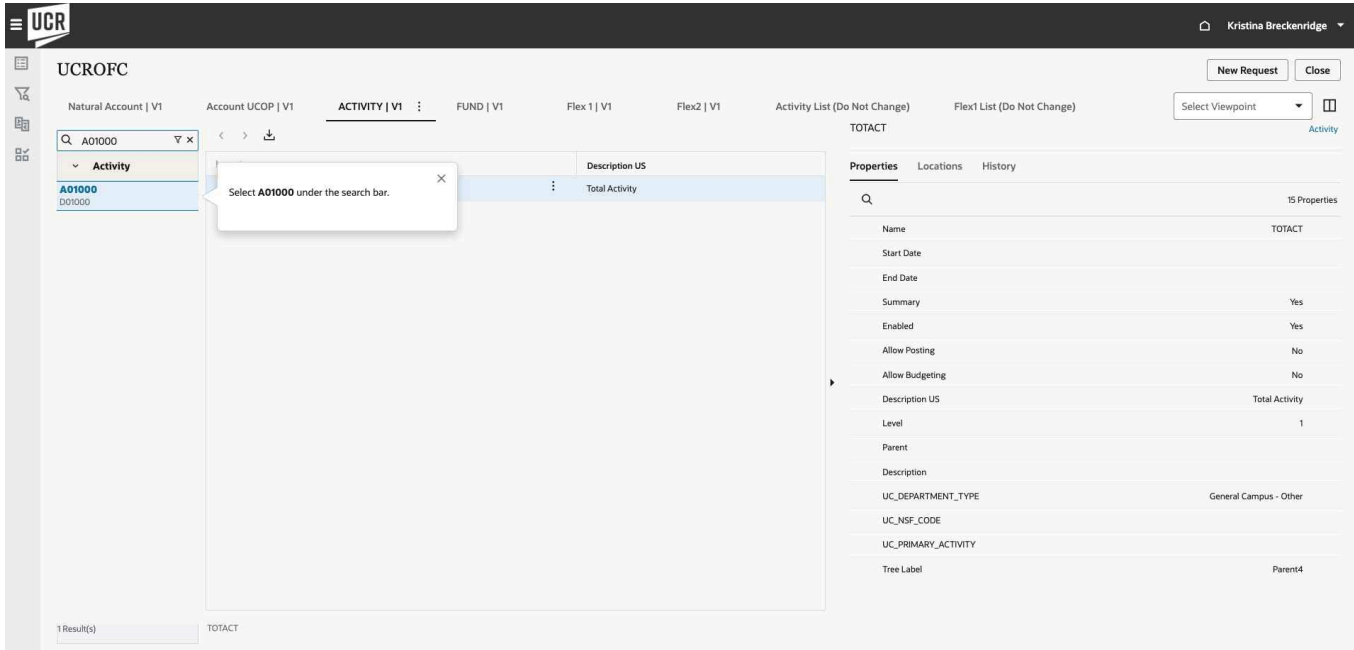
Step 6



This is where you will enter your desired value.

For testing purposes, enter **A01000** into the search bar.

Step 7



Select **A01000** under the search bar.

Step 8

The screenshot displays the 'UCROFC - Request 7085' interface. The top navigation bar includes 'Submit', 'Actions', and 'Done' buttons. The main area is divided into several sections: a search bar with 'A01000' entered, a tree view of organizational nodes, and a properties panel for the selected node 'A01000'. The tree view shows a hierarchy starting with 'TOTACT' and 'ORG10', with 'A01000' selected under 'DIV100' and 'D01000'. The properties panel on the right shows details for 'A01000', including its name, start/end dates, summary, and parent organization.

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.

Step 10

The screenshot shows the UCR system interface for 'Request 7085'. The main area displays a tree view of organizational nodes under 'ACTIVITY | V1'. The selected node is 'A01000 SOE Deans Office'. To the right, a 'Properties' table is visible for the selected activity. A callout box with a 'Next' button is overlaid on the properties table, containing the text: '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.'

Properties	
Name	A01000
Start Date	
End Date	
Summary	No
Enabled	Yes
Allow Posting	Yes
Allow Budgeting	Yes
Description US	SOE Deans Office
Level	5
Parent	D01000
Description	
UC_DEPARTMENT_TYPE	General Campus - Other
UC_NSF_CODE	510 - Education
UC_PRIMARY_ACTIVITY	
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.

Step 11

The screenshot shows the UCR system interface for 'UCROFC - Request 7085'. A dialog box titled 'Add Description.' is open, providing instructions for adding a default FAU and location code to the description of a department being moved. The dialog box text reads: '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 FAU's 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_ttyMNYBJhFHGb3v51ApAUMnKdS9xw?e=9F4GW7. 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 'Next >' button is visible at the bottom right of the dialog box.

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_ttyMNYBJhFHGb3v51ApAUMnKdS9xw?e=9F4GW7

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”.

Step 12

The screenshot shows the Oracle EPM interface for 'UCROFC - Request 5953'. The 'Submit' button is highlighted in bold. A modal dialog box titled 'Step 1 of 1' is open, displaying 'Select Submit.' with 'Close', 'Back', and 'Next' buttons.

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.

Step 13

Thank you for completing this Oracle Guided Learning Tutorial!