

## MEMORANDUM

TO: Campus Financial Staff

FROM: Stephanie Flores, Executive Director  
Financial Planning & Analysis

DATE: June 21, 2023

RE: Deployment of Oracle COA Management

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As part of the [Impact23 Program](#), the new Chart of Accounts (COA) management tool, Oracle COA Management, has launched! The functional owner of this tool is Financial Planning & Analysis (FP&A), which provides support and guidance to staff regarding chart segment requests.

**What can you request in Oracle COA Management?**

- Updated description for the activity, department, division, Org, and/or Flex1 COA fields
- Movement within the activity hierarchy within your security role (for example if there is an internal reorganization)
- A Flex1 or Activity segment to be added

**Are there any approvals related to Oracle COA Management?**

Yes! After your Department SAA establishes Org Requestor or Viewer roles and FP&A establishes Org Approver (CFAO-level) roles in EACS, departments can then initiate requests in Oracle COA Management. Here is the link to [Oracle COA Management](#) and the application should be in R'Space as an Authorized Application this Friday, June 23.

Department requestors initiate the request, which is then approved by their CFAO or CFAO designee before it is routed to the Central Budget Office for final approval. Please ensure that your CFAO or CFAO designee has access prior to creating a request due to the functionality of Oracle because the Org Approver will not be able to see anything prior to their provisioning – creating a request before the Org Approver has system access will result in needing to re-create the request.

**How do we learn more about Oracle COA Management?**

To initiate a request, please consult your CFAO for guidance on the process as they received a step-by-step guide during the monthly CFAO meeting. Prior to submitting a request, it is important to familiarize yourself with the guidelines for COA values and descriptions, which can be found in the [Chart of Accounts Overview](#) training. The Impact23 Training team will soon incorporate further system guidance into the virtual training course.

Additionally, Oracle Guided Learning (OGL) will be available in Oracle COA Management within the next couple of days. Instructions on how to download and install the OGL chrome extension will be made available [here](#). If you have any inquiries, please feel free to contact FP&A, at [budgetoffice@ucr.edu](mailto:budgetoffice@ucr.edu) as we have several staff members who should be able to assist you.