

Step-by-Step Guide

Reorg Table Update

What is the Reorg Table?

The Reorg Table in the Finance System is used by the various campus controller's offices to identify FOPPS whose Orgs are changing. Entries made in the Reorg Table are handled as follows:

- Only the Org can be changed in the FOPPS. (To change other ChartField values in the FOPPS, contact the Office of University Controller.)
- The old SpeedType may continue to be used with the newly reorg'd FOPPS...or a new SpeedType may be created for the new FOPPS.
- If the original SpeedType will be used for the new FOPPS, the system will create – and immediately inactivate – a new SpeedType for the old FOPPS.

The entries created in the Reorg Table are used during the next month-end close process. At that time, the Finance System creates Journal Entries (JEs) to transfer **budget and actual ledger amounts** out of the old FOPPS and into the new FOPPS (same Account ChartFields). Note that encumbrance amounts are **not** included in this reorg month-end process. Encumbrances must be handled manually by the campus.

Creating Reorg Table Entries

After logging in to the Finance System, navigate to:

General Ledger → Allocations → Set up and Perform Allocations → Reorg Def CU

Reorg Def CU

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Fund Code:

Organization:

Program Code:

Project:

Sub-class:

Include History Correct History

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

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Enter the old FOPPS and click the SEARCH button.

If this FOPPS has already been reorg'd, you will immediately be transferred to the Reorg CU page.
If this FOPPS needs a second reorg, contact the Office of University Controller.

Reorg Def CU
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

Fund Code:

Organization:

Program Code:

Project:

Sub-class:

Include History Correct History

Search
Clear
[Basic Search](#)
[Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

Reorg Def CU
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

Fund Code:

Organization:

Program Code:

Project:

Sub-class:

Include History Correct History

Search
Clear
[Basic Search](#)
[Save Search Criteria](#)

No matching values were found

[Find an Existing Value](#) | [Add a New Value](#)

If this FOPPS has not been reorg'd, you will see the message **No matching values were found**. In this case, click ADD A NEW VALUE (tab at top of page, or button at bottom of page).

On the new page (new tab), click the ADD button.

Reorg Def CU

Find an Existing Value
Add a New Value

Fund Code:

Organization:

Program Code:

Project:

Sub-class:

Add

[Find an Existing Value](#) | [Add a New Value](#)

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On the Reorg CU page:

In the "FROM" section...

The old FOPPS and SpeedType information is displayed.

- Click the **SEL** (Select) checkbox.
- Change the **EFF DATE** (Effective Date) field to the first day of the current month.

In the "TO" section...

- Type the new Org # in the **ORG** field.

Reorg CU

SetID: UCOLO

Speedtype Key Change

Use old ST (Use old ST on new FOPPS) Do It

Move to new ST (Inactive old, get active ST on new FOPPS)

From

Fund: 30 Sponsored Projects- Fed & Priv Proj: 1540500 Cu Ctr Astrobiology

Org: 10060 LASP Sub-Cls:

Pgm:

Sel	SpeedType	Eff Date	Status	Description	Available Resources
<input type="checkbox"/>	13059293	11/01/2003	Active	Cu Ctr Astrobiology	None

Scroll Area Find | View All First 1 of 1 Last

*Eff Date: [] *Status: Active Oper.Id: R01018 Lucas,Robert Craig

To

Fund: 30 Sponsored Projects- Fed & Priv Proj: 1540500 Cu Ctr Astrobiology

*Org: [] Sub-Cls:

Pgm: *Descr: []

SpeedType	Eff Date	Status	Description

Save Add Update/Display Include History Correct History

- Provide an explanation in the **DESCR** field, e.g., **Reorg from 10060 to 10590 RCL** (This identifies the reorg action, and the initials of the person taking this action.)

During month-end processing, the Finance System will generate a JE to transfer budget and actual ledger amounts from the old FOPPS to the new FOPPS. The JE will have a Journal Source Code of SCR (Cash Rollup & Reorgs); the lines for this particular FOPPS transfer will have the above Description.

At the top of the page...

Choose the best procedure for handling SpeedType changes. **Either:**

- Use the old SpeedType for the new FOPPS.
(In this case, a new SpeedType for the old FOPPS will be created and inactivated.)

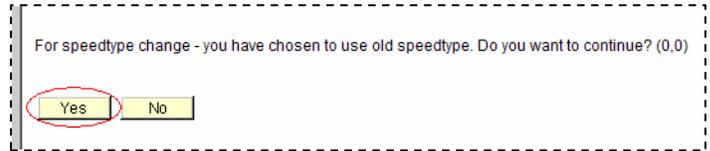
or:

- Get a new SpeedType for the new FOPPS.
In this case, a new SpeedType will be created and activated for the new (reorg'd) FOPPS.
The old SpeedType – which will continue to identify the old FOPPS – will be inactivated.

- Click the **Do It** button.

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A message will display, asking for confirmation that this action should proceed. In the example above, the option chosen was “Use old ST on new FOPPS”...producing the following confirmation message:



If this is correct, click **YES**.

Messages will display, confirming the handling of the old SpeedType (moving to the new FOPPS or staying with the old FOPPS)...and the creation of a new SpeedType (for either the old FOPPS or the new FOPPS).

Click **OK**.

The screenshot shows the "Reorg CU" interface. At the top, a "Speedtype Key Change" dialog is open with "Use old ST" selected. Below it, a "From" section shows details for Fund: 30, Org: 10060, and Proj: 1540500. A "Windows Internet Explorer" pop-up window displays a yellow warning icon and the message "speedtype 13059293 has been changed to new FOPPS." with an "OK" button circled in red. Below the pop-up is a "Scroll Area" with search filters and a table of SpeedTypes. At the bottom, a "Save" button is circled in red.

SpeedType	Eff Date	Status	Description
13085481	08/20/2008		
13059293	08/20/2008	Active	Cu Ctr Astrobiology

If the FOPPS involves a sponsored project, remember to change the Org in SPINS, as well. Note that if the Org has already been changed in SPINS (at least one day prior to the Reorg Table update), then the Do It button will not be available. In this case, click the SAVE button.



Although the new SpeedType is created immediately, the actual reorg process (transferring amounts out of the “From” FOPPS and into the “To” FOPPS) will not take place until the next month-end close.