

KFS Org Checklist for Document Initiators: Edit Org

	✓	Item	Notes
Edit Org Name		Steps to Edit the Org Name	Consider the items below when wanting to update the name of an Org.
		Review the Proposed Name with Internal Stakeholders	Org names, especially for those also in UCPATH, impact other systems. Others in your unit may be impacted by changing the Org name (e.g., UCI Directory, recruitment).
		Review Names of Other Orgs in the Structure	Keep in mind naming convention (if any) of other orgs within the structure. Ensure the name being requested will not be confused with another Org.
		Ensure Org name must be 30 characters or less.	To keep KFS and UCPATH synchronized, names have to be only 30 characters, because UCPATH only allows 30. Even if the Org will not be in UCPATH, it must be 30.
		KFS Fiscal Officer Initiates Request using Org Document in KFS	Make sure to include full and official name of Org in the document description (if longer than 30 characters). This will give approvers better context.
		Review Org for Other Necessary Edits/ Updates	It is a good time to review other attributes that need to be updated, while updating the name. The main ones being Organizational Manager or default account.
		Submit Org Document for Review	Once submitted, the document will route within the unit, and then it will go to Budget Office for approval. After the Budget Office, Accounting will also approve.
		Update UCPATH Department Name, if the Org is also in UCPATH	The Budget Office will forward request for the name change to Campus' UCPATH team, and they will submit request to Path Center to update UCPATH.
		<i>Organization Default Account Number</i>	<i>This field has no impact on other parts of KFS, it is not necessary to update this field if you are not updating other attributes of the Org in the same process.</i>
Organization Manager Principal Name		Steps to Edit the Organization Manager Principal Name	Consider the items below when wanting to update the name of the Organization Manager Principal Name.
		Review the Proposed Name with Internal Stakeholders	The Organization Manager Principal Name has no impact on central or external reporting. It is not important to central offices that this field is updated, but it may be important to those within your organization.
		Review Name on other Orgs	The best practice is to have all Orgs in a structure have the same person as the Organization Manager Principal Name. In most cases, it is the vice chancellor or dean. All Orgs in the structure may also need to be updated.
		KFS Fiscal Officer Initiates Request using Org Document in KFS	Explain the reason for the update in the description, and provide the title of the person chosen to be the Organization Manager Principal Name.
		Review Org for Other Necessary Edits/ Updates	It is a good time to review other attributes that need to be updated, while updating the Organization Manager Principal Name. The main ones being the Org Name or default account.
		Submit Org Document for Review	Once submitted, the document will route within the unit, and then it will go to Budget Office for approval. After the Budget Office, Accounting will also approve.
		No Impact to UCPATH Departments	Organization Manager Principal Name is a field only in KFS - not UCPATH
			<i>Organization Default Account Number</i>