Oracle COA Management Guide

Financial Planning & Analysis

UC Riverside

Last Modified March 11, 2026

COA Training

The structure of the Chart of Accounts is based on UCOP's reporting requirements. Certain areas have flexibility that can be managed here in the Oracle COA Management tool.

What can you request in Oracle COA Management?

- Updated description for the activity, department, division, Org, and/or Flex1
- Movement within the activity hierarchy (for example if there is a reorganization)
- A new Department, Division, Activity, or Flex1 segment can be added

Are there any approvals related to Oracle COA Management?

Yes! Department staff must first request access from their CFAO to request access from FP&A. After FP&A establishes Department Requestor and Approver (CFAO-level) roles in EACS, departments can then initiate requests in Oracle COA Management.

The department requestor will initiate the request, then it is approved by the CFAO (or CFAO designee) before it is routed to the Central Budget Office (CBO) for final approval.

Guidelines for COA Values and Descriptions

For all Flex1 requests, segment descriptions should be easy to understand by end users, avoid special characters, and minimize the length to only what is necessary.

Flex1 Requestors and Approvers should ensure nodes and descriptions are unique.

New Segments in the Activity Tree requests are considered when no other Golden Tree segment identifies what you want to track (i.e. fund, BC, etc.)

When requesting a new Division, Department, or Activity code, the CBO determines which codes are available, for input purposes, the Department can use DIVXXX, DoXXXX, AoXXXX.

For more information on valid COA combinations and Cross-Validation Rules, sign up for courses in the LMS system.

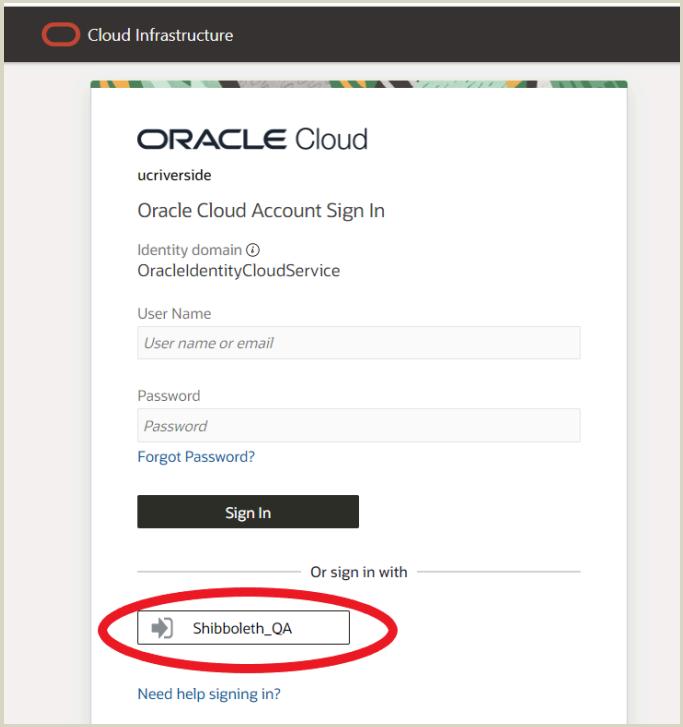
Flex1 Field Training

1. Log into the system.

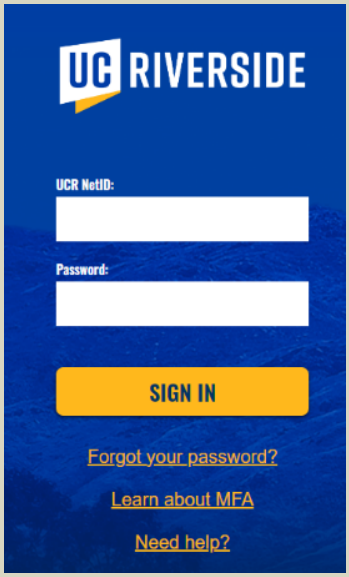
This will be in rSpace once we go live. Until then, use the below link.

a. EMP Oracle Cloud - https://edm-test-ucriverside.epm.us-phoenix-1.ocs.oraclecloud.com/epm/

b. Click on Shibboleth_QA.



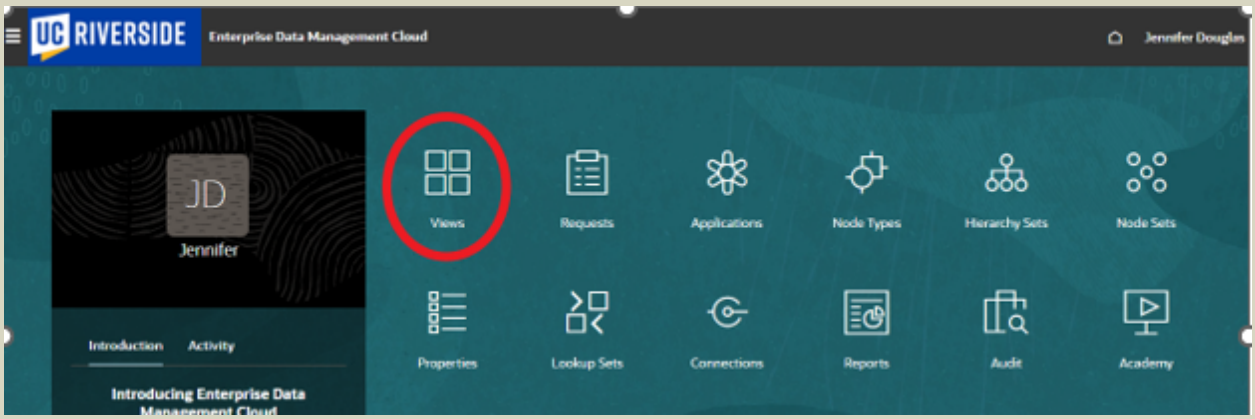
c. Login with NetID and password and authenticate via the UCR system.



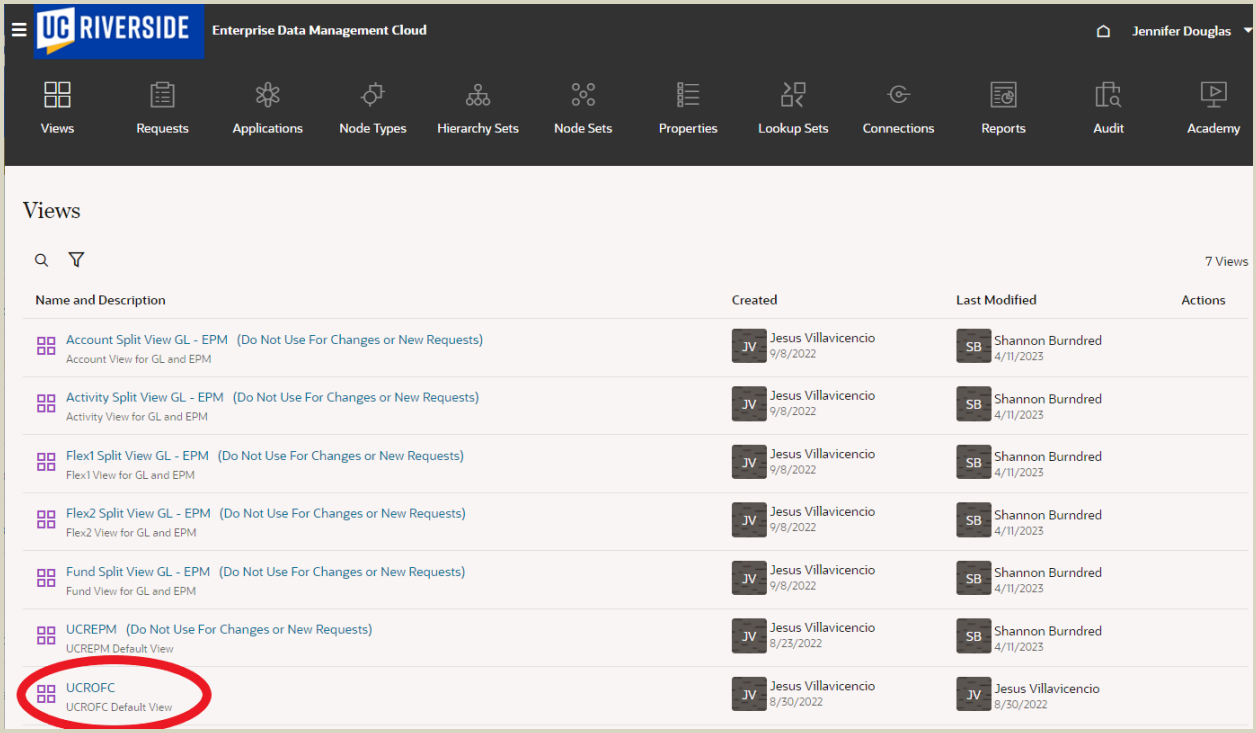
Flex1 Field Training

2. Creating a Flex 1 code.

a. Click on 'Views.'

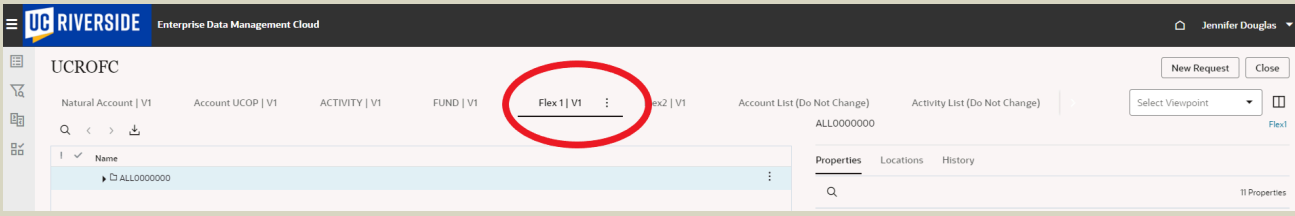


b. Click on 'UCROFC.'

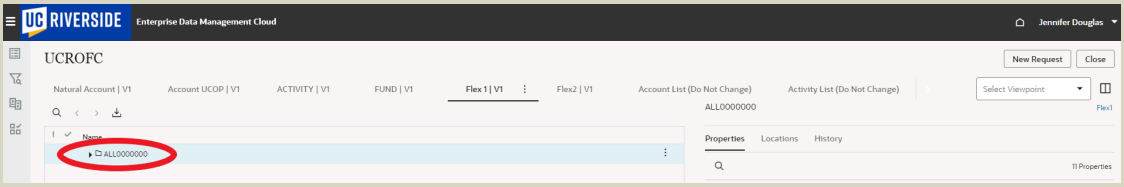


Flex1 Field Training

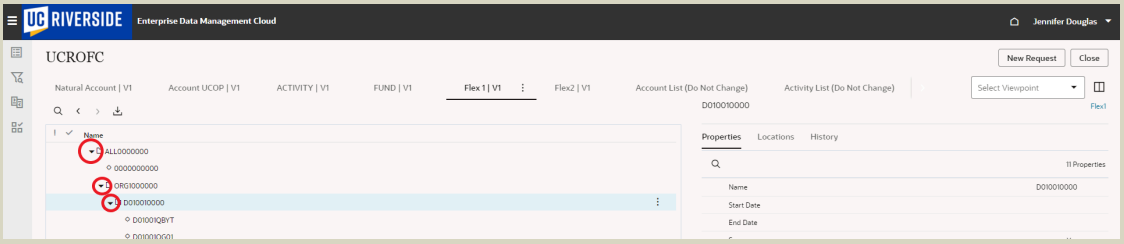
c. Scroll over to 'Flex 1| V1.'



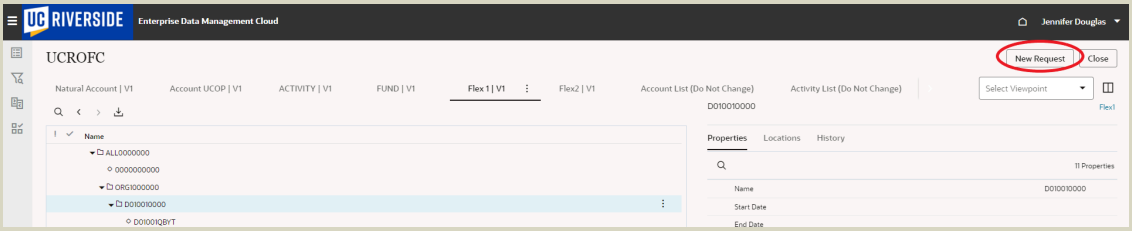
d. Click the '>' to view the tree.



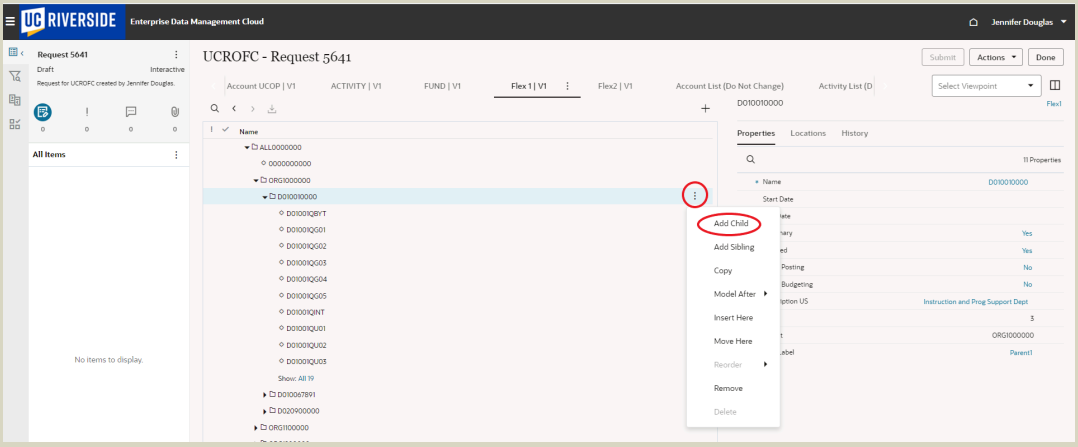
e. Click on the '>' to open up the tree (ORG & Department Code) until the Flex 1 codes are shown.



f. Click on 'New Request.'



g. Click on the 3 horizontal dots next to the department code and then click 'Add Child.'

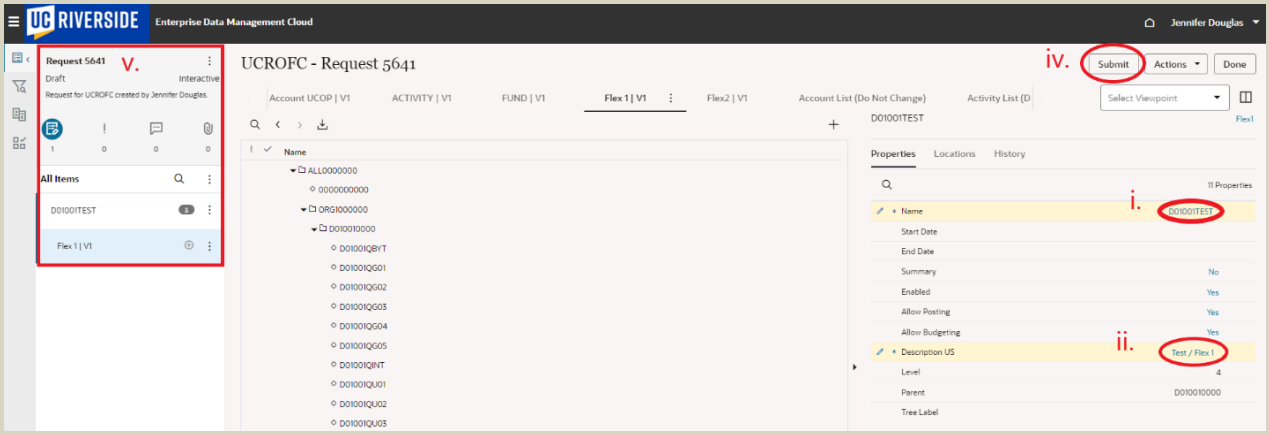


Flex1 Field Training

OR click on the Flex 1 code 3 horizontal dots and then click 'Add Sibling.'



h. Click on 'Name' (must be 10 characters long including space) and click on the 'Description US' (no more than 30 characters long and has a restriction on special characters entered).
   i. The name needs to include the 6-digit Department code and 4 other digits.
   ii. Then add the Description US.
   iii. No other fields need to be adjusted.



   iv. Click on 'Submit.'
   v. Draft request number shows at the top with the tree details.
   vi. The request is now in flight and is waiting on further approvals.

3. Adding a Department code if it is not showing in the tree.

a. Find the ORG that needs the Department code added
b. Click new request at the top right
c. click on the 3 dot located at the end of the ORG name that is highlighted in blue

Flex1 Field Training

d. click “Add Child”



e. Enter the Name as the department code followed by four zeros - D0XXXX0000 (10 digits)

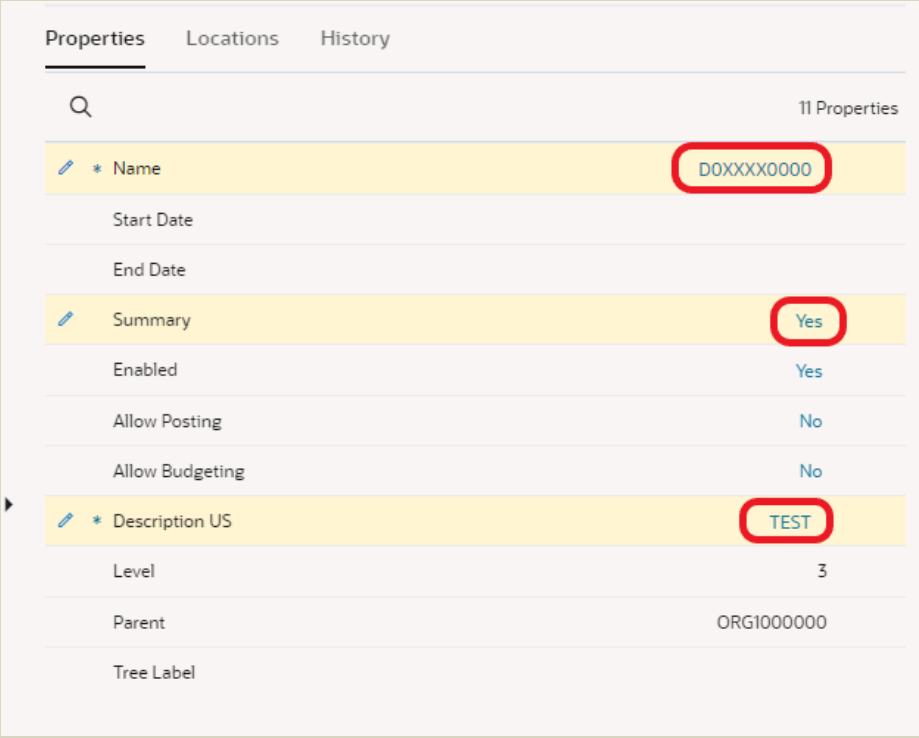
f. Change Summary to “YES”

g. Enabled is “YES”

h. Allow Posting is “NO”

i. Allow Budgeting “NO”

j. Add a Description



k. All sections you are adjusting are in yellow

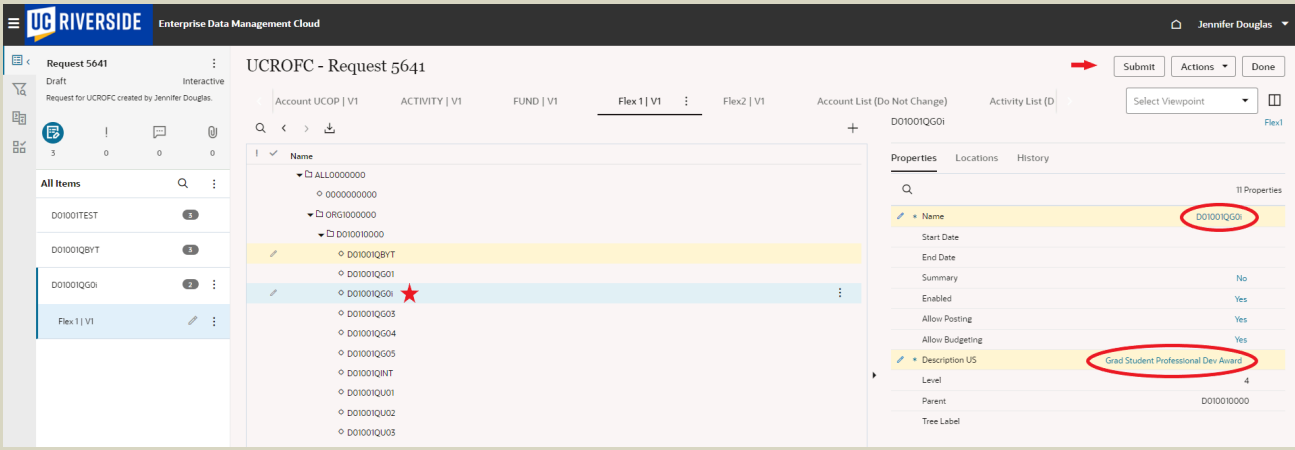
Flex1 Field Training

l. To continue to add Flex 1 fields to this request follow steps g. through h in section 2.
   i. If the request is submitted before Flex 1 is added, you will need to wait for the request to be approved before you can add the Flex 1.
   ii. It is recommended that you create the Flex 1 codes and submit one request will multiple Flex 1 codes under the same department code.

4. Changing a Flex 1 field.

Follow steps a. through f. in section 2.

a. Go to 'View.'
b. Then 'UCROFC.'
c. Scroll over to 'Flex 1| V1.'
d. Then click the '>' to view the tree.
e. Continue to click on the '>' to open the tree (ORG & Department Code) until the Flex 1 codes are shown.
f. Click on 'New Request.'
g. Click on the flex code you would like to change.
h. Update the 'Name' and/or 'Description US.'
i. Click on 'Submit.'
j. The request is now in flight and is waiting on further approvals.



5. Deactivating a Flex 1 field.

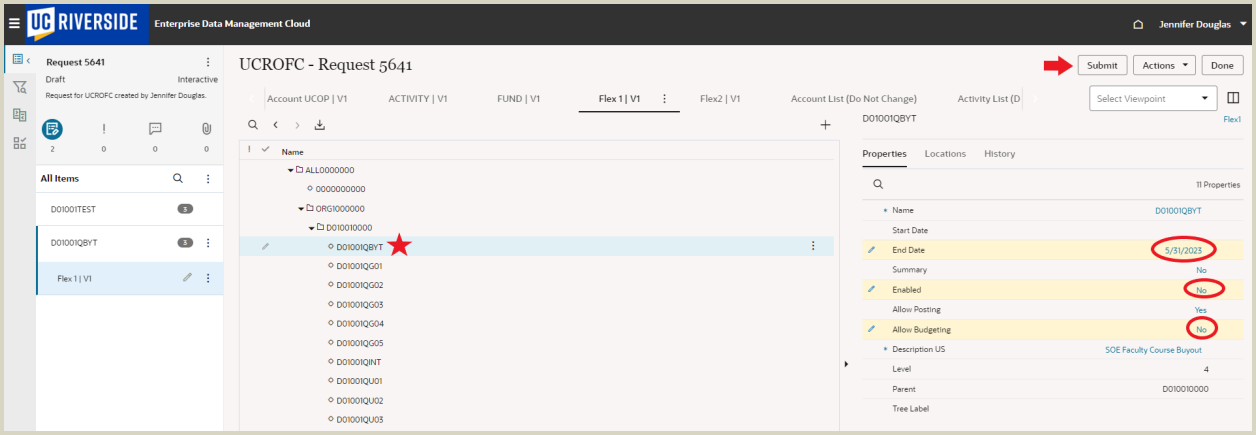
Follow steps a. through f. in section 2.

a. Go to 'View.'
b. Then 'UCROFC.'
c. Scroll over to 'Flex 1| V1.'
d. Then the '>' to view the tree.

Flex1 Field Training

e. Continue to click on the '>' to open the tree (ORG & Department Code) until the Flex 1 codes are shown.
f. Click on 'New Request.'
g. Click on the flex code you would like to deactivate.
h. Click on 'End Date' – cannot be today's date and needs to be future dated (recommended to be the end of the month).
i. Change the 'Description US' to add the word 'INACTIVE' at the beginning of the description.
j. Change 'Allow Budgeting' to 'NO.'
k. DO NOT change 'Summary' or 'Allow Positing,' they should remain 'No' and 'Yes' respectively.
l. Click on 'Submit.'

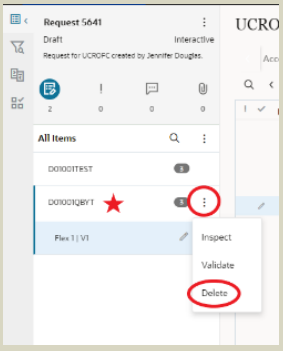
m. The request is now in flight and is waiting on further approvals.



6. Request Created in Error.

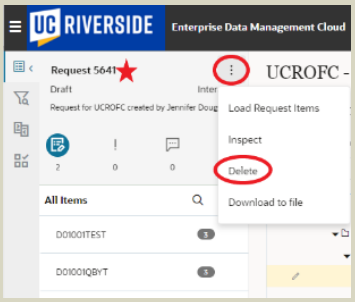
These can be deleted two ways.

a. 1st way
    i. Click on the flex code.



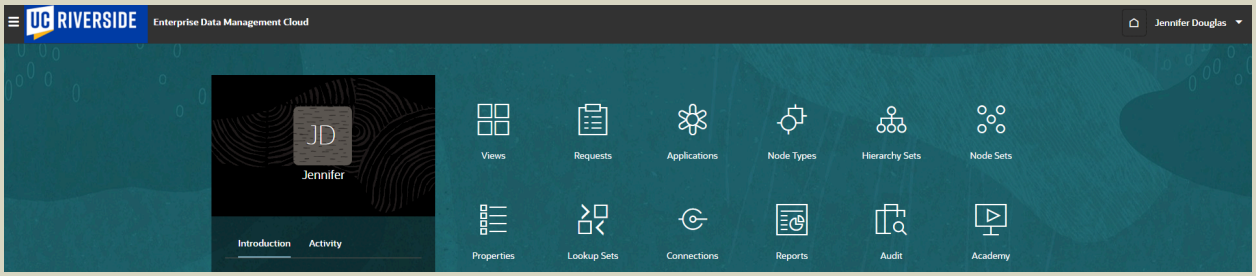
ii. Click on the 3 dots.
iii. Click on delete.

b. 2nd way
   i. Click on the Request Number.
   ii. Click on the 3 dots.
   iii. Click on delete.



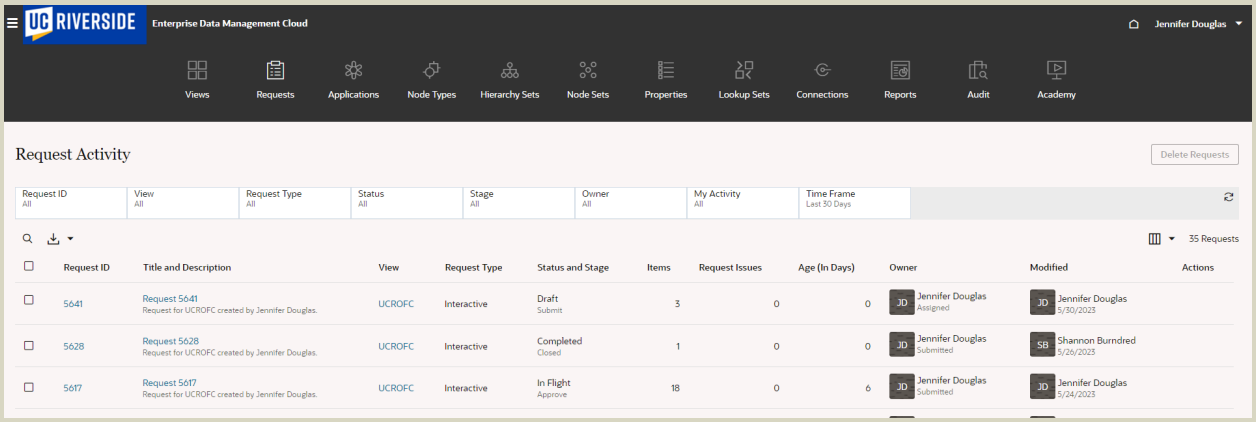
7. Reviewing a Request

a. Use the home button on the top right of the screen next to your name.
b. Click on 'Request.'



c. This will show you all the requests you have created and their respective statuses.

Flex1 Field Training



d. Click on the 'Request ID' hyperlink in blue to take you into the request for more details.
e. Recall an In-Flight request.
    i. Click on the hyperlink of the Request ID.
    ii. Click on actions then recall.
    iii. Make the changes needed and submit it again for approvals.



Activity Tree Modification Request

As part of making any change to a department-level or above node, we need to provide UCPath with the department default FAU (Activity/Function) and the department location code. This applies even if it's just a name change. The change in Oracle COA Management Tool cannot be approved by the CBO until UC Path has provided their approval (may take 14-30 days on average).

All default FAUs use fund 69993. All the unit needs to provide for the default COA is the Activity/Function/Program.

A similar process must be done for location code. We need the unit to provide the location code. Units can use this job aid which shows the FMS steps to find the building and room numbers: https://ucpath.ucr.edu/sites/default/files/2022-03/LocatingWorkstation.pdf and/or 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.

To provide this information in your request, we ask that you input the Default COA and Location Code in the "Description" field.

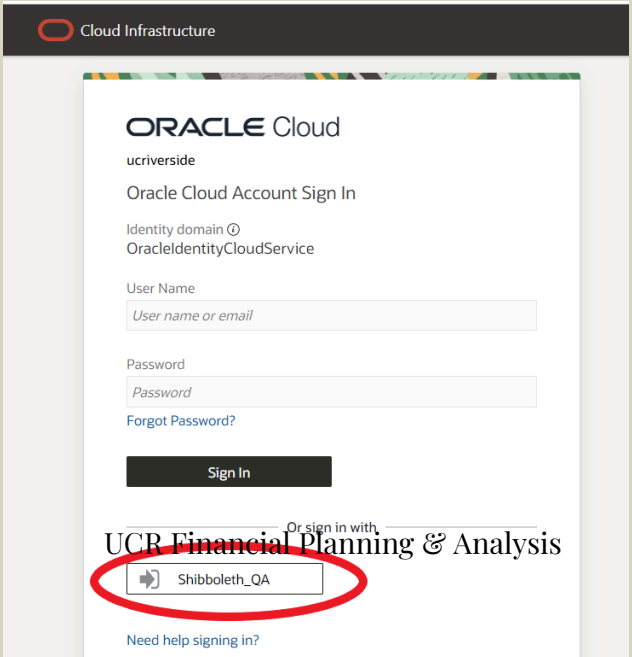
i. Please use the following format as an example "A01000/40/000 and 4034018"
ii. Always click 'Submit' to finalize your request.

2. Log into the system.

This will be in rSpace once we go live. Until then, use the below link.

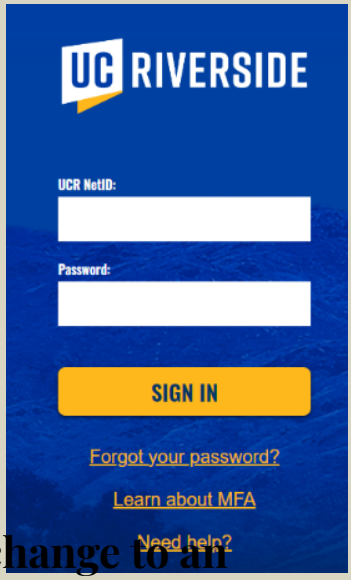
a. EMP Oracle Cloud - https://edm-test-ucriverside.epm.us-phoenix-1.ocs.oraclecloud.com/epm/

b. Click on Shibboleth_QA.



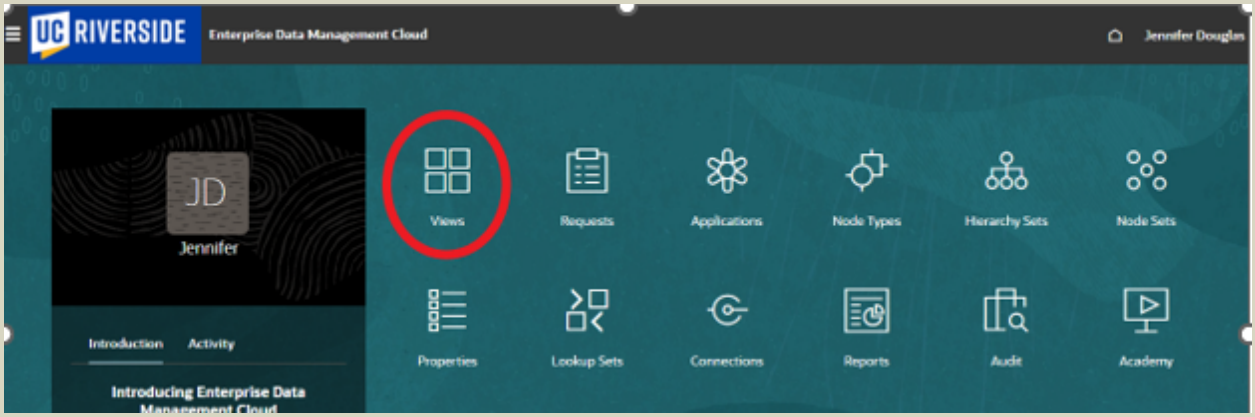
Activity Tree Modification Request

c. Login with NetID and password and authenticate via the UCR system.



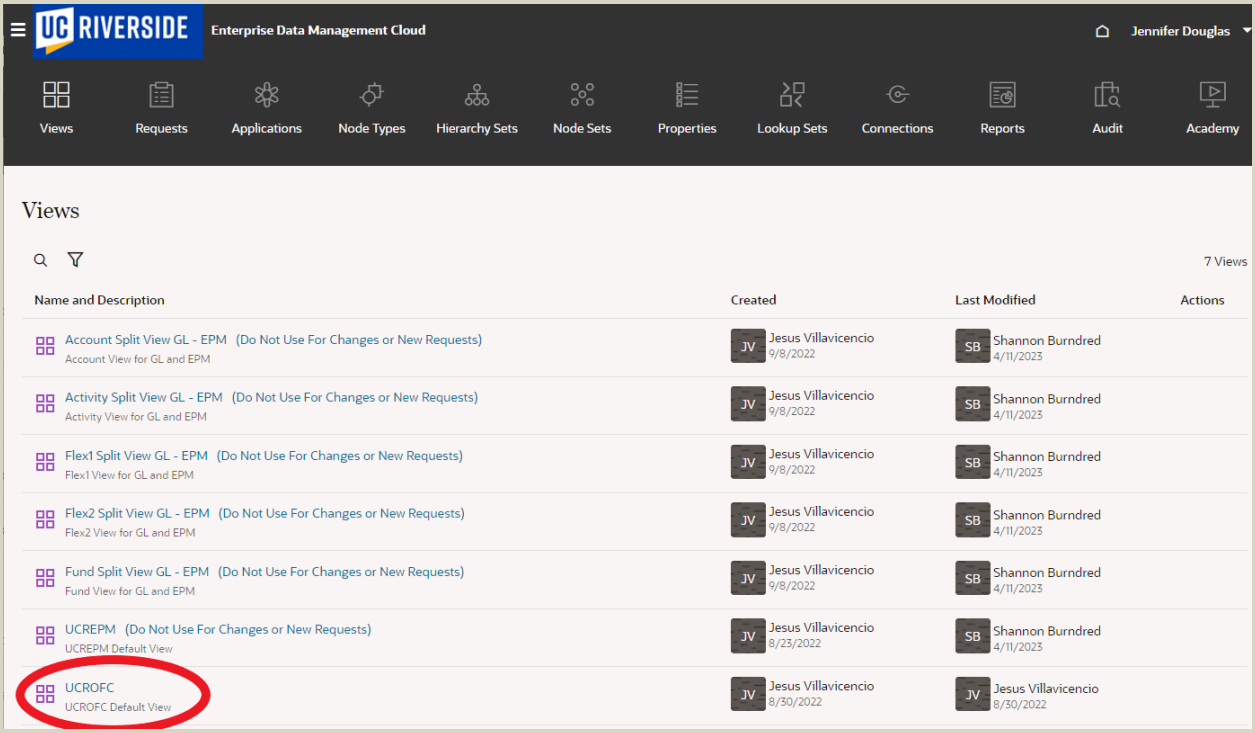
3. Requesting a name change to an Activity/Department/Division/ORG Node:

a. Go to 'Views.'

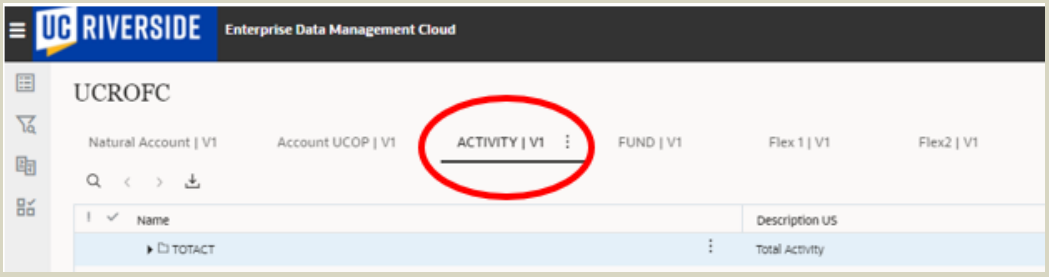


b. Then 'UCROFC.'

Activity Tree Modification Request

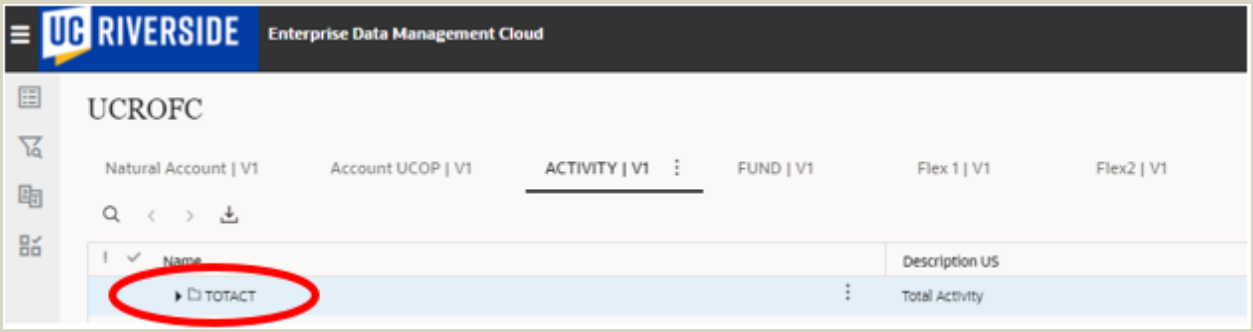


c. Select 'ACTIVITY| V1.'

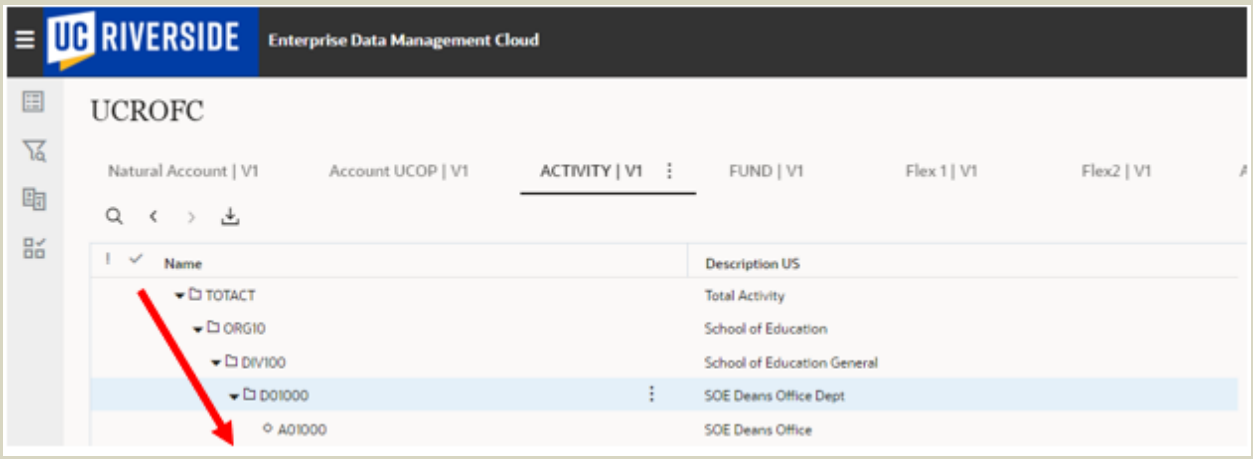


d. Click on 'Total Activity >' to expand the tree.

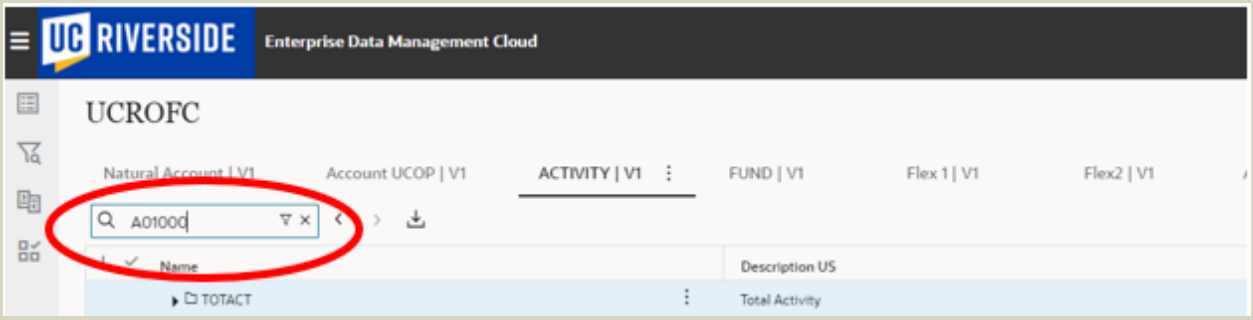
Activity Tree Modification Request



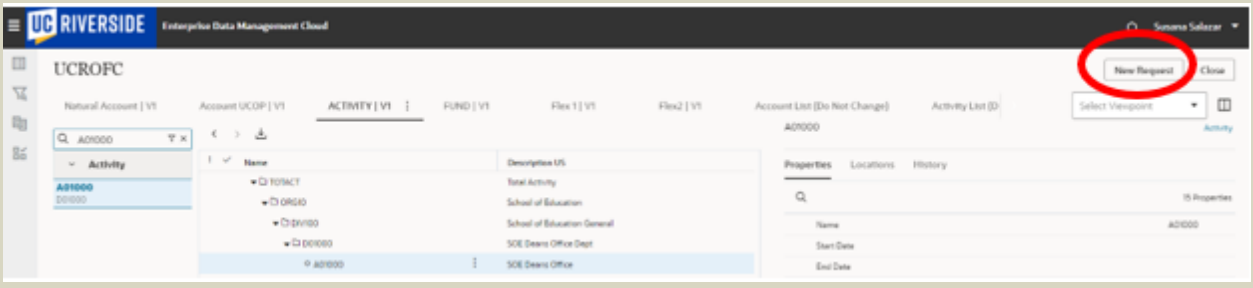
e. There are two ways to find the node you are looking for; you can continue to expand the tree until you find the activity node you would like to impact.



OR you can do a search.

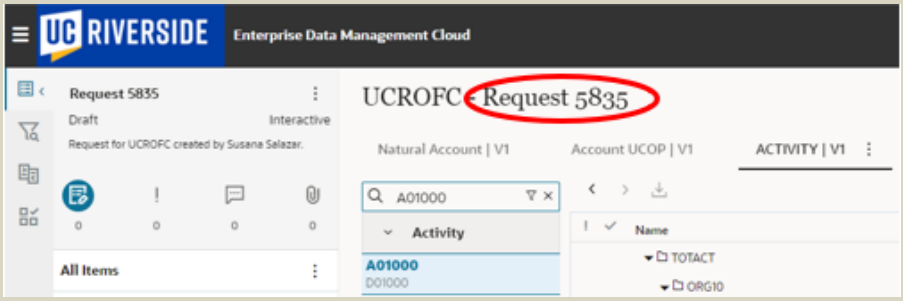


f. Once you have selected the desired Activity/Dept/Div/ORG, click on 'New Request.'

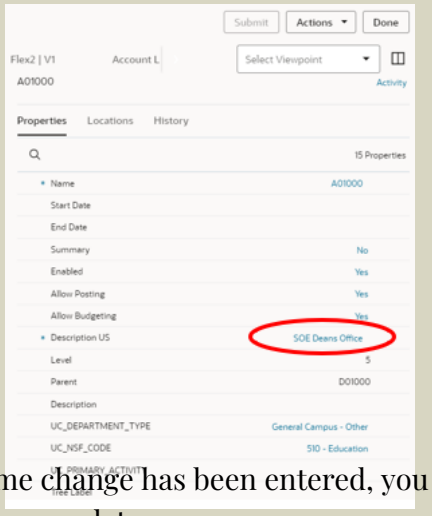


Activity Tree Modification Request

g. Once you click on a new request, a request number will show up on the top left of the page. Please note that you can include multiple changes within one request. You simply make all the desired changes before finalizing or submitting your request; however, for purposes of this guide we will assume each example is a separate request.

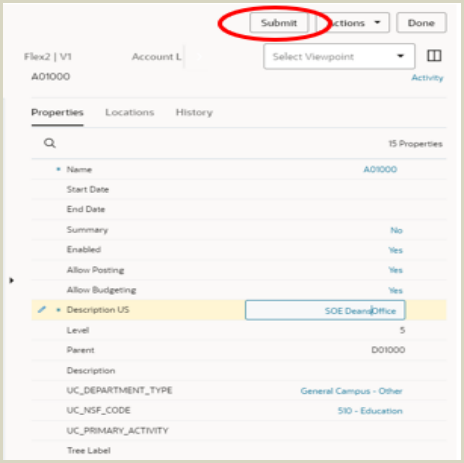


h. Once a request is open, a 'Properties Table' will open to the right of the screen with editable fields that are shown in blue font. Here you can change the name of the node by simply updating the 'Description US' field, no other fields should be changed ('Description US' should be no more than 30 characters long). Please note, however, that no special characters may be used in the name except for a colon ':' or an ampersand '&'. All other characters will cause an error message.



i. Once the name change has been entered, you then select the 'Submit' button and the request is complete.

Activity Tree Modification Request

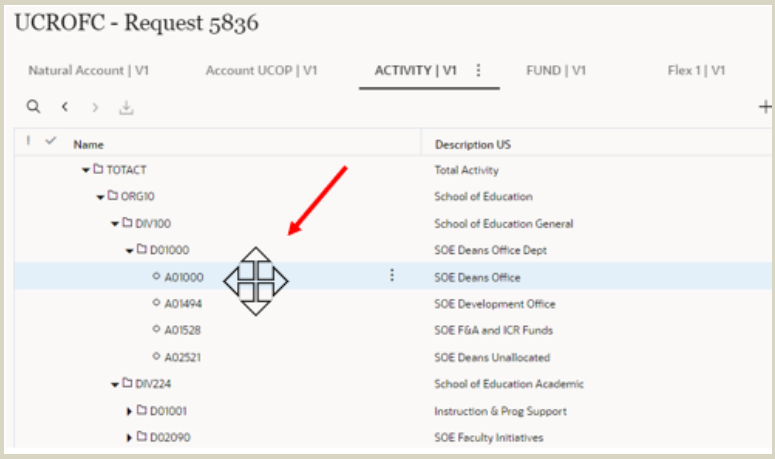


j. Lastly, the same process as above would be used when inactivating an activity tree node, we request only that you change the name of the node to have a prefix of INACTIVE in all caps at the beginning of the Description US to signal you want to inactivate a node.

4. Requesting to move an Activity/Department/Division Node:

Follow the same Steps as 2a through 2g as noted above to open a new request for your selected node.

k. Hover over the node name you want to move, and an arrow quad will appear over the node code (we are displaying a larger arrow quad and slightly to the right below for illustration purposes only).



l. Once you see that arrow quad that means you can click and drag the node wherever you want to move it.

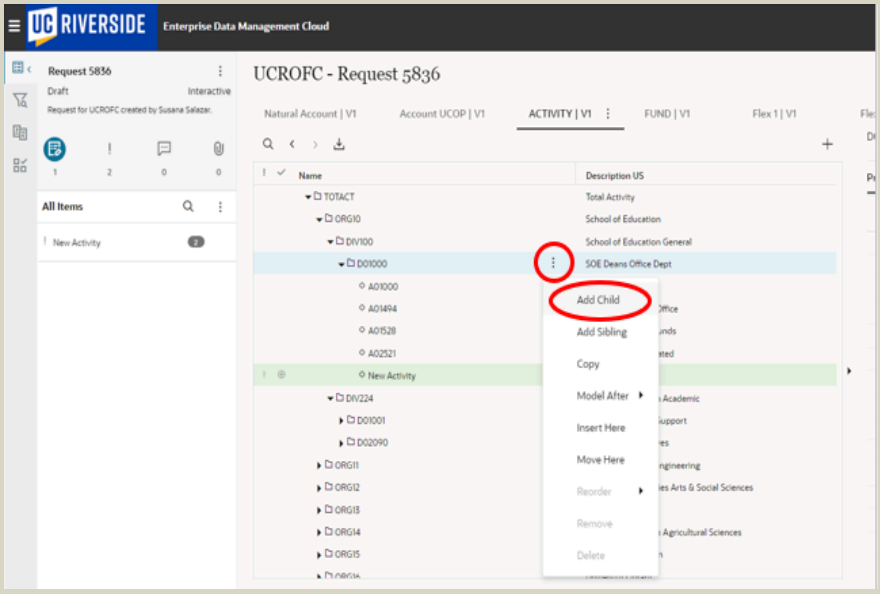
Activity Tree Modification Request

i. 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.
ii. 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.
iii. If you move a department or division node all child nodes under that department or division will be moved as well.

5. Requesting to add an Activity/Department/Division Node:

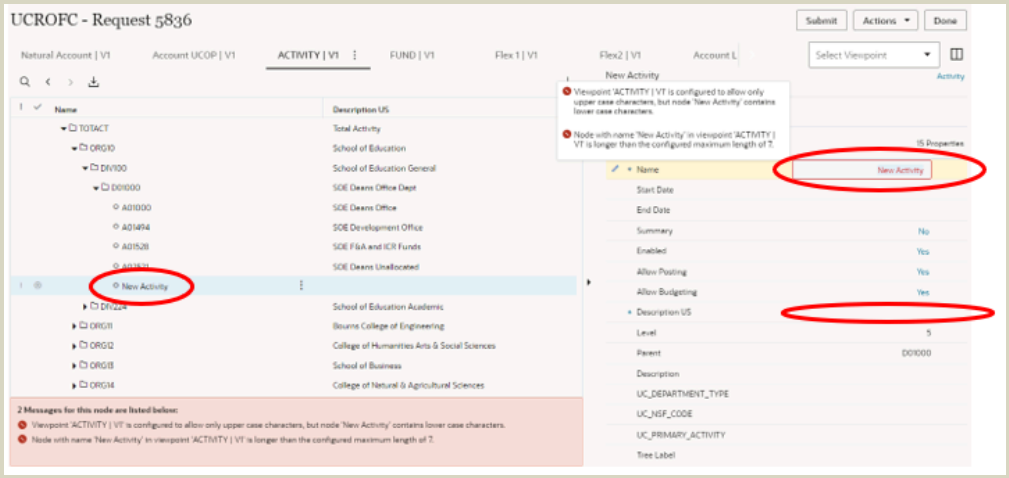
Follow the same Steps as 2a through 2g as noted above to open a new request for your selected org.

m. To add an activity, click on the 3 horizontal dots next to the department code and then click add Child. Or click on the 3 horizontal dots next to the last activity code for that department code and then click add Sibling.



n. The screen will then show a node that is defaulted to New Activity, and the properties window will become editable.

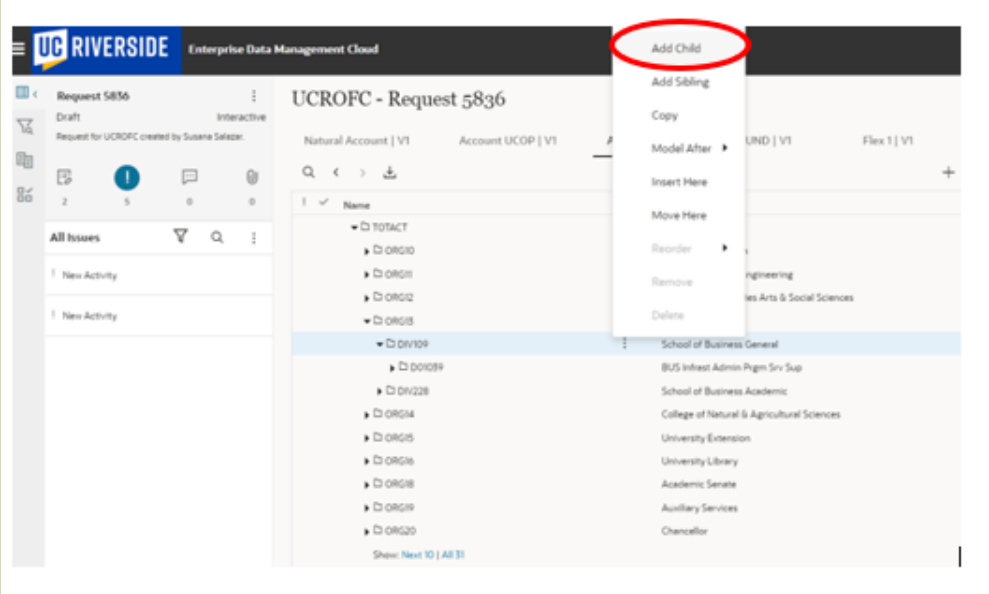
Activity Tree Modification Request



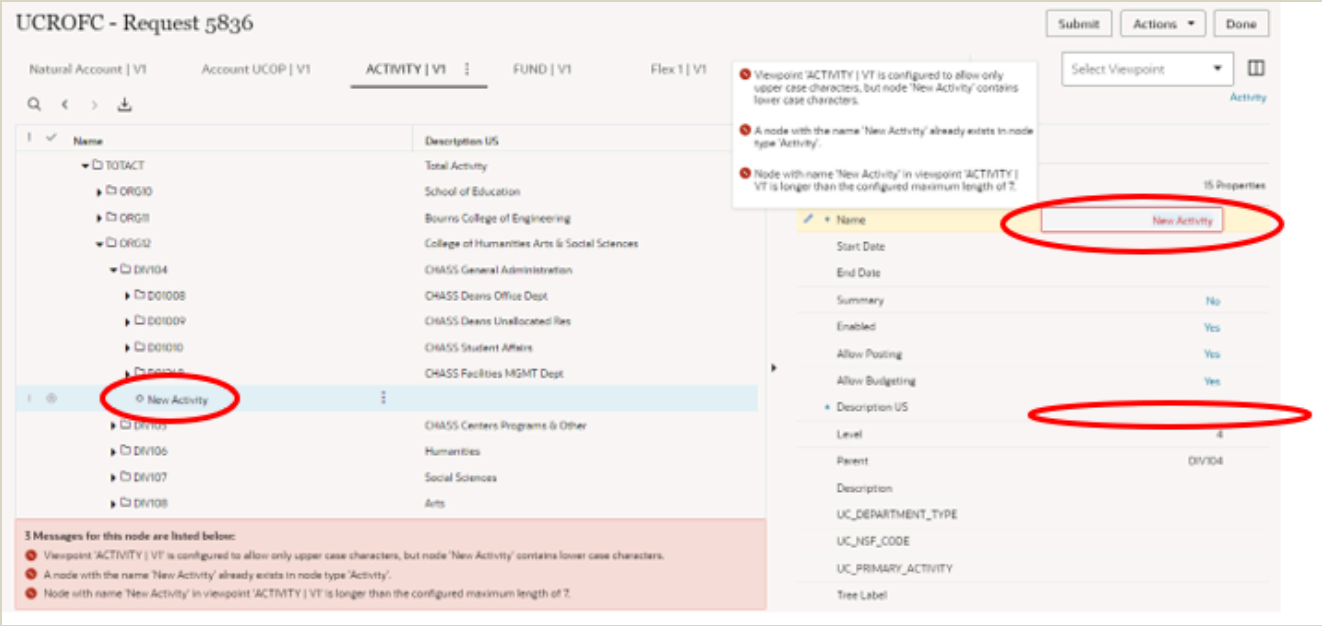
o. You will notice an error message will appear stating that the node name can only include upper case characters and the character limit is 7. This is because you must edit in the properties sections the node Name.
    i. Delete 'New Activity' and enter AoXXXX.
        - The budget office will determine what the final new node name or activity number should be, but the system requires that you enter an uppercase number/letter combination of your choice.
        - If you provide a node that already exists, the system will alert with an error message pop-up. Change one of the X's to a number value to override the error message.
        - Other flags and fields in the property table will be automatically defaulted and left as is.
        - Leave the Summary flag as a 'No,'
        - Leave the Enabled Flag, Allow Posting Flag, and Allow Budget Flag as 'Yes.'
        - The level for an Activity should always be a number 5 and the department parent will default based on where you created it. Nothing else is required.

p. To add a department, the same rule applies, you click on the 3 horizontal dots next to the Division code and then click 'Add Child.' Or click on the 3 horizontal dots next to the last Department code for that Division code and then click 'Add Sibling.'

Activity Tree Modification Request



q. The screen will then show a node that is defaulted to 'New Activity,' and the properties window will become editable.



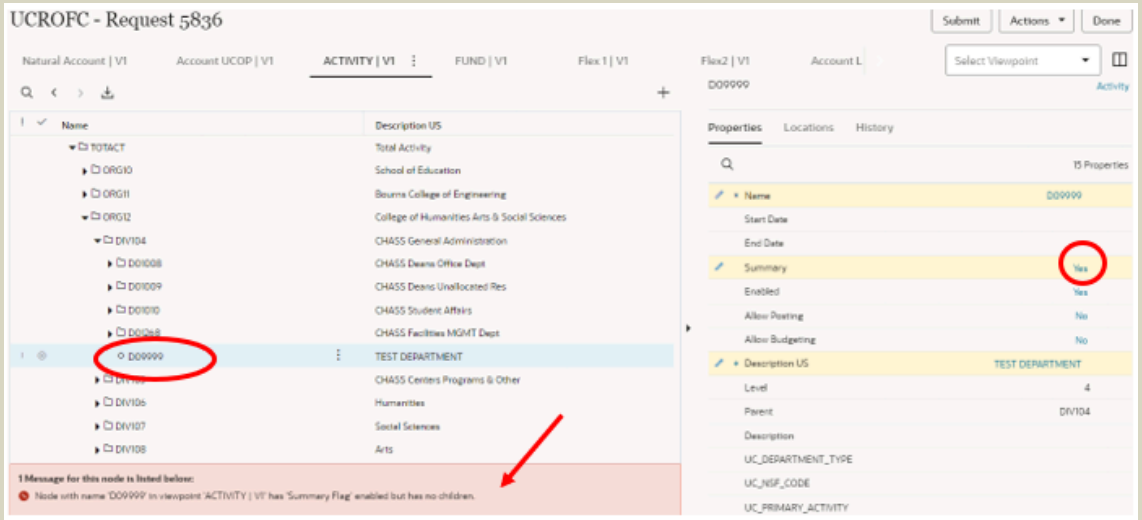
f. You will notice an error message stating that the node name can only include upper case characters and the character limit is 7. This is because you must edit in the properties sections the node Name.
    i. Delete 'New Activity' and enter DoXXXX.
        1. The budget office will determine what the final new node name or activity number should be, but the system requires that you enter an uppercase number/letter combination of your choice.

Activity Tree Modification Request

2. If you provide a node that already exists, the system will alert with an error message pop-up. Change one of the X's to a number value to override the error message.
    a. Change Summary Flag to Yes
    b. Change Allow Posting Flag to No
    c. Change Allow Budgeting Flag to No
    d. The level for a 'Department' should always be a number 4
    e. Change Description field to relevant Default COA and Location Code
    f. Add the Department Type and NSF Code

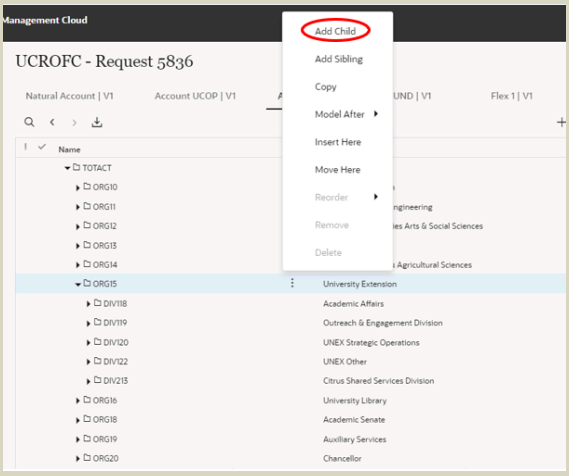
i. You'll notice that by changing the 'Summary Flag' to YES, the system will generate a new error. It will tell you that a Summary Flag has been enabled but the node has no children.

- Every department/division/org requires a node with a posting level activity (summary flag No)
- When creating new parent nodes, you will either have to create a new child under that node, or move an existing Activity under that new Department
- If you are creating a new Activity for this new Department, it is a best practice to get that Activity approved prior to the development of this new Department, so that UCPath sees the Activity as available if it will be the default activity
    a. Email Susana Salazar at susana.salazar@ucr.edu for guidance on the best way to submit this request, particularly in the case of a multi-pronged request

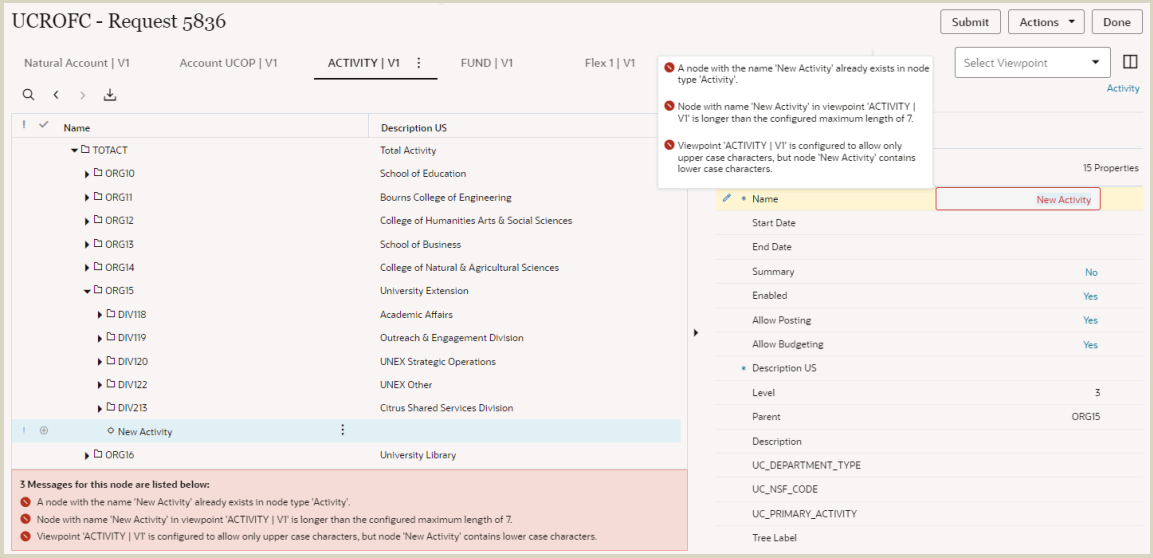


Activity Tree Modification Request

r. To add a division, the same rule applies. Click on the 3 horizontal dots next to the 'Org' code and then click 'Add Child' or click on the 3 horizontal dots next to the last Division code for that Org and then click 'Add Sibling.'



s. The screen will then show a node that is defaulted to 'New Activity,' and the properties window will become editable.



i. You will notice an error message stating that the node name can only include upper-case characters and the character limit is 7. This is because you must edit the node Name in the properties section. Delete 'New Activity' and enter DIVXXX. The budget office will determine what the final new node name or Division number should be, but the system requires that you enter a unique one for now. If the node you entered already exists, the system will provide a new error message. To override the error message, simply change the last X to a numerical value

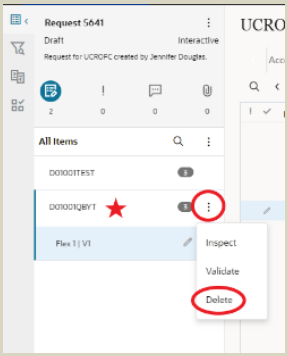
Activity Tree Modification Request

ii. Update the following fields:
    1. Add Description US (no more than 30 characters long)
    2. Change Summary Flag to Yes
    3. Change Allow Posting Flag to No
    4. Change Allow Budgeting Flag to No
    5. The level for a Division should always be a number 3
    6. The Org parent will default based on where you created it

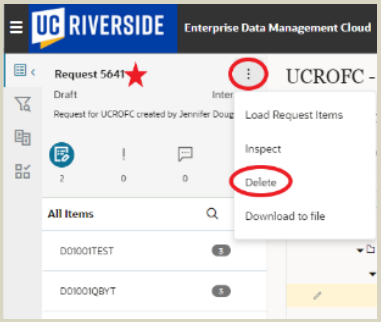
t. Like Division, you'll notice that by changing the summary flag to YES, the system will generate a new error. It will tell you that a Summary Flag has been enabled but the node has no children. Every department/division/org requires a node with a posting level activity (summary flag No). When creating new parent nodes, you will either create a new child (Department) under that node or move an existing department from another Division.

6. Request Created in Error

u. 1st way
    i. Click on the activity/dept/div code.
    ii. Click on the 3 dots.
    iii. Click on delete.



v. 2nd way
    i. Click on the Request Number.
    ii. Click on the 3 dots.
    iii. Click on delete.

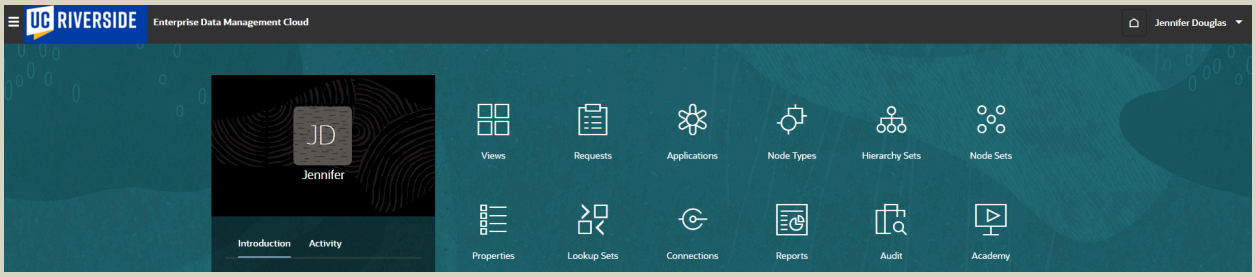


Activity Tree Modification Request

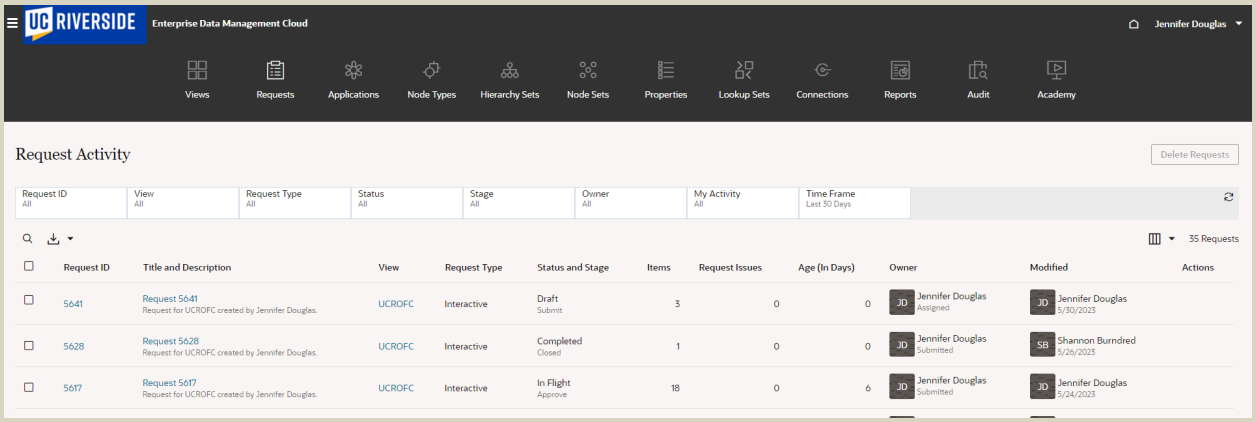
7. Reviewing a request

w. Use the home button on the top right of the screen next to your name.

x. Click on request.



y. This will show you all the requests you have created and the status.



z. Click on the Request ID hyperlink in blue to take you to the request for more details.

aa. Recall an In-Flight request.

i. Click on the hyperlink of the Request ID.

ii. Click on actions then recall.

iii. Make the changes needed and submit it again for approval.

