

HR Account Code Copy Process

Account Code Copy Process

The following tasks are used to run the *Account Code Copy* process. This process is used to create the new accountcodes for fund values that change each year, i.e. for General Fund (AD20X) and Reimbursed Activities (BD20X). This process inserts new Account Codes into ACCT_CD_TBL based on the ChartField parameter(s) specified.

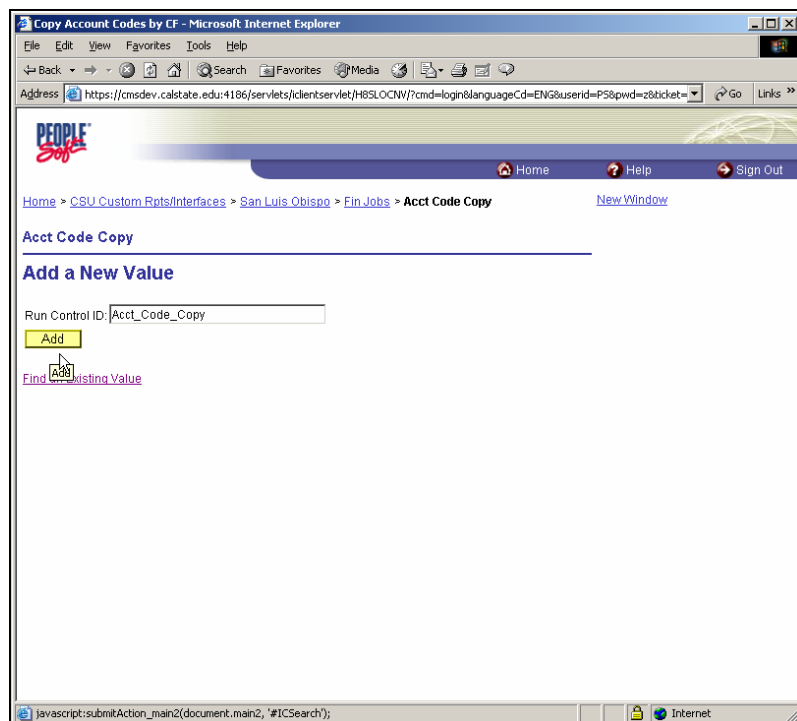
The process will only build accountcodes that are active.

Additionally, the process rebuilds the account codes from the chartfield values, rather than just copying the old accountcode with a new fund value. This is to clean up any accountcodes that may have been built incorrectly in error when processed manually. For example, if you happen to build an accountcode for 125100-AD203-601300-PC016 but forgot to indicate the P on the accountcode for the program like 125100-AD203-601300. The program will build it correctly as 125100-AD203-60130-P.

This process should be ran in test environment and the output should be verified before the process is run in Production.

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- 0) At the Acct Code Copy run control click on "Add a New Value"
- 1) Enter the Run Control ID.
- 2) Click Add.



3) At the **Account Cd Copy** page fill in the the *Conditional Fields*:

- From Fund Code –enter the old fiscal year fund
- To Fund Code – enter the new year fiscal year fund

4) For the test run do NOT check the FINAL LOAD box. Only check the Final Load box after you have tested the process and verified the results.

5) Click RUN

Panel Description

Use the Account Code Copy panel to specify the ChartField values (From and To) in which to build new Account Codes. The Account Code Copy process has an option to run as a report only or to load data. The Final Load indicator is used to specify the run option.

Field Descriptions

From Account: Indicate the GL Account to copy from. This field is prompted against the GL Account table.

From Fund Code: Indicate the Fund Code to copy from.

From DeptID: Indicate the DeptID to copy from.

From Program Code: Indicate the Program Code to copy from.

From Class: Indicate the Class to copy from.

From Project ID: Indicate the Project ID to copy from.

To Account: Indicate the GL Account to copy to. This field is prompted against the GL Account table.

To Fund Code: Indicate the Fund Code to copy to. This field is prompted against the Fund Code table.

To DeptID: Indicate the DeptID to copy to. This field is prompted against the HR Department table.

To Program Code: Indicate the Program Code to copy to. This field is prompted against the Program table.

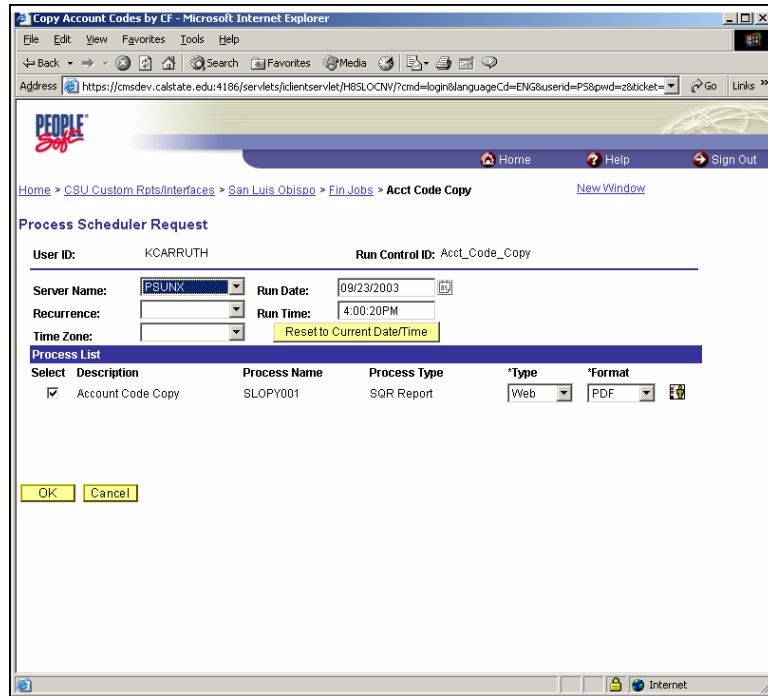
To Class: Indicate the Class to copy to. This field is prompted against the Class table.

To Project ID: Indicate the Project ID to copy to. This field is prompted against the Project/Grant table.

Final Load: Indicate Final Load after initial run has been verified. When Final Load flag is on, the database will be updated based on parameters specified.

- 6) The **Process Scheduler Request** page displays.
- 7) Choose PSUNX for the Server Name
- 8) Click OK

NOTE: Review the NAME of the process you are running (i.e. SLOPY001). Often there are a number of processes that might be running concurrently. Knowing the name of your process will help you easily identify it on the Process Monitor.



Panel Description

Use Process Scheduler Request to request a process to run. Using this panel, you can determine which Server to run the process on and the file type and format of the output.

Field Descriptions

User ID: The Operator ID displays.

Run Control ID: The Run Control ID displays.

Server name: Since this process should be run on UNIX, choose 'PSUNX' as the server name.

Run Date/Time: The run date and time defaults to the current date and time.

Run Recurrence: Select the number of time that you would like the process to reoccur. If you want the process to only run once, leave the default value of 'Once'.