



Financial Systems Data Field Changes

Lawrence Berkeley
National Laboratory

Financial Policies and Procedures

Part II

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Primary contact:	Manager, Business Systems Analysis

Summary

The purpose of this policy is to establish guidelines for initiating changes (add/activate, close/inactivate or modify) to data fields in PeopleSoft Financial Systems, to ensure consistency, data integrity and control.

Policy

Whenever a data field needs to be changed, the requestor completes the relevant form (see Financial Data field Modification Forms), and obtains the signature of the requesting Department Manager, and approval from the General Accounting Manager. Other approvals are required as follows:

- If the proposed change is for a General Ledger (GL) Account, approval from the Reconciling Department Manager is required.
- If proposed change affects budgeting, project costing and reporting, approvals from the General Accounting Manager and the Budget Manager (or designee), are required.

The Business Systems Analysis (BSA) Manager will approve the request after both the necessary above approvals are obtained and a BSA analyst has analyzed the potential impacts from implementing the request.

Procedure

It is the responsibility of requesting and approving managers to thoroughly analyze the impact of the proposed change on functional and business practices, systems and reporting requirements.

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In addition, an analyst(s) from Business Systems Analysis (BSA) will also analyze and document recommendation(s) on the proposed change prior to implementation. Where ever required, the BSA Analyst will also obtain inputs from Information Systems (IS) programmers. Based on the recommendations from BSA Analyst, the BSA Manager will approve the change.

Once required approvals are obtained, a BSA Analyst will implement the requested change in PeopleSoft Financial Systems and will communicate the change to the appropriate Data Warehousing (DW)/ BLIS and other systems representatives for necessary updates as required.

Contacts

Manager, Business Systems Analysis (CAAxthelm@lbl.gov)

Glossary

- **Data Fields:** GL Account, Management Analysis and reporting Systems (MARS) code, Resource Type, Resource Category, Project Type

Related documents

[Financial Data field Modification forms](#)