OACIS, the Online Activity Code Input System

OACIS is a web application for requesting updates to Activity Codes in OSU’s Banner chart of accounts. This user-oriented program eliminates the FOAPA paperwork for Activity Codes and provides for electronic routing, editing, approvals and status inquiry. With this application, you can request to ADD, CHANGE or TERMINATE Activity Codes in your College or Administrative Unit.

Here are the Interface Basics:
- Only a valid OSU e-mail address is required to submit requests.
- No login is needed to submit requests or to search the status of a request.
- Chart Administrators login to do approvals using OSU ID and GAP.
- Chart Administrators may edit and approve or disapprove requests.
- Chart administrators may add comments to document the reason for an action.
- Search function allows a wide variety of search criteria.
- Color-coded status indicators provide quick reference.
- PDF print function available as needed.

OACIS Terminology:
- Requestor – Possesses valid OSU e-mail address and creates the request.
- Unit Chart Administrator (UC) – provides College or Admin. Unit-level review of requests.
- Institutional Chart (IC) Administrator – performs final review and Banner update functions.

Getting Started:
OACIS Link: [https://fasystems.oregonstate.edu/OACIS/](https://fasystems.oregonstate.edu/OACIS/)

Creating a Request –
1) Mark the type of request and select the appropriate College or Administrative Unit in the drop-down box.
2) Enter the reason for the request to help the administrator decide on its merit.
3) The first character designating the selected unit will default into the code and prefix boxes. You fill in the remaining 3 or 2 characters, respectively. Codes are four digits beginning with the letter assigned to the unit and ending with three alpha/numeric digits representing the unique activity. The prefix is 3 digits beginning with the letter assigned to the unit and ending with two additional alpha characters. This prefix should be the same one used in your orgs and general fund index codes. Some units,
such as Liberal Arts have only a single prefix (CLA), others such as Science have prefixes for each department (SCI, SMT, SST, SZO, etc.).

4) The form will default the Code and Prefix to all caps. Please use proper case for Titles.

5) The form will validate against the chart of accounts to determine that the code and type of request are consistent. ADDs must be new, CHANGEs and TERMINATIONs must already exist in the chart. Effective dates for ADDs will be set to the first day of the oldest FY that is open in Banner. Effective dates for CHANGEs and TERMINATIONs can only be the current date, or future.

6) Enter as many requests of the same type and purpose as desired.

7) Your completed request is available in the system to search any time or you may choose to print a PDF.

8) Submit the request when you are finished and it will be routed to the Unit Chart Administrators for the College or Administrative Unit that you selected.

Searching for a Request—

1) Enter any of the listed criteria in order to search requests.

2) Click the Search button and requests meeting the criteria will be returned at the bottom of the page.

3) To view a request, click on the Request ID at the left side of the results set.

4) Status options include: PENDING for requests that have been submitted but not yet approved by the Unit Chart (UC) Administrator; UC APPROVED and UC DISAPPROVED are for actions that have been reviewed by the UC; IC APPROVED and IC DISAPPROVED are for actions that have been reviewed by the Institutional Chart (IC) Administrator. IC APPROVED requests have been completed in Banner.

UC Administrator Review—

1) Login using your OSU ID and GAP to view pending requests in your queue.

2) Select a request by clicking on the ID number in the left-hand column.

3) Options are to EDIT, APPROVE, DENY or CANCEL out of the form. Use the EDIT option if any changes are needed prior to sending to the next approval level. Note that the Unit Chart Administrator is responsible for completing all EDITs! Because requestors are not required to login, the DENY option kills the request (it does NOT route it to the requestor), so please use the option judiciously.

4) Admin Notes in the EDIT option allow for correspondence between administrators. These notes are secured, so they are not visible to the requestor.

5) The REASON field is not secured (the requestor can view it) and is strongly recommended for use when denying a request in order to provide documentation and feedback.

6) Requests APPROVED by the Unit Chart (UC) Administrator are forwarded to the Institutional Chart (IC) Administrator for review and Banner input (if approved).

Questions or comments on OACIS should be directed to Cindy Alexis, Budget & Fiscal Planning, at Cindy.Alexis@oregonstate.edu or by phone at 541-737-0903.