Online Activity Code Input System (OACIS)

OACIS is the web-based application for requesting new or changes to existing Activity Codes in the OSU Banner chart of accounts. This user-centric program includes electronic routing, in process editing, timely approvals and the ability to query the status of the submission. OACIS makes it possible for the user to submit a request to Add, Change or Terminate an Activity Code.

OACIS Interface Basics:

- Only a valid OSU e-mail address is required to submit requests.
- No log in is needed to submit requests or to search the status of a request.
- Unit Chart (UC) Administrators must log in with their ONID User Name and Password to process approvals.
- UC Administrators may edit and approve or disapprove requests.
- UC Administrators may add comments to document the reason for an action.
- The search function allows a wide variety of search criteria.
- Color-coded status indicators provide quick reference.
- PDF print function is available as needed.

OACIS User Roles:

Requestor –OSU employee responsible for submission of the OACIS request for a new or revision to an existing Activity Code

Unit Chart (UC) Administrator– Responsible for unit-level review of OACIS requests.

Institutional Chart (IC) Administrator – Responsible for the final review and approval of the OACIS requests, and update of the Banner record.

Locating the Link: https://fasystems.oregonstate.edu/OACIS/ or http://fa.oregonstate.edu/budget/foapa under Activity Codes you will find the link (OACIS)

To Create an Activity Code Request:

1. **Request Type**: Click the radio button that identifies the Request Type. 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.

2. **Effective Date** (this field is optional): Effective dates for ADDs will be set to the first day of the current Fiscal Year. Effective dates for CHANGEs and TERMINATIONs will populate the current date if no other date is provided. Use past dates is not permitted.

3. **College/Admin Unit**: From the drop-down list, select the college or administrative unit related to this request.

4. **Description-Use/Reason**: In the text box, provide information describing the request, such as the use (what) and reason (why). The information provided will help to determine the validity/need of the request.

5. **Code & Prefix Boxes**: The first characters in the Code and Prefix boxes automatically default to the college/admin unit selected in step 3.

    a. **Code**: The Code Field is limited to 4 characters, with the first character automatically populating upon clicking the empty field. Enter an additional 3 unique characters, alpha and/or numeric, to the Code Field.

b. **Prefix**: The Prefix Field is limited to 3 characters, with the first character automatically populating the box upon clicking the empty field. The Prefix entered should match the Prefix used with the Org Code and general fund Index Code. 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.).

c. **Code** and **Prefix** fields default to an all capital letter format. Use *Proper Case* for **Titles.**

- Multiple requests are allowable on a single form. Enter as many requests *of the same Request Type and purpose* as desired.
- Submit the request on completion. Submitted requests route to the UC Administrators for the select College or Administrative Unit.
- Completed requests are available in the system to search or print (pdf format) at any time.
- Ensure all transactions and redistributions, including all payroll-related actions, are <u>complete before submitting</u> TERMINATION requests.

Request Search:

1. Enter desired search criteria. Click the Search button.
2. Search will return requests meeting the criteria and located at the bottom of the page.
3. To view the request, click on the Request ID on the left side of the results set.
4. Status options include: PENDING for requests that have been submitted but not yet approved by the UC Administrator; UC APPROVED and UC DISAPPROVED reflect the action taken following review by the UC Administrator; IC APPROVED and IC DISAPPROVED reflect the action taken following review by the IC Administrator. IC APPROVED requests are complete and available in Banner.

For UC Administrator Review:

1. Log in with ONID User Name and Password to view pending requests in 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 UC 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 this option judiciously.
4. **It is the responsibility of the UC Administrator to ensure all financial transactions and redistributions, including all payroll-related actions, are complete before approving TERMINATION requests.**
5. Admin Notes in the EDIT option allow for correspondence between UC and IC administrators. These notes are secure and not visible to the requestor.
6. The REASON field is open and visible to the requestor. It is strongly recommended for use when denying a request as it provides documentation and feedback to the requestor.
7. Requests APPROVED by the UC Administrator are forwarded to the IC Administrator for review and Banner input (if approved).

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Questions or comments on OACIS should be directed to
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