

Financial Manager Change Request

The Financial Manager Change Request section of the Finance New FOP system replaces the current emailed requests to Finance Systems Management and the Budget Office. The Financial Manager Change Request and related training documentation can be accessed from the WebRaider portal, HSC El Paso Finance, under Accounting Services.

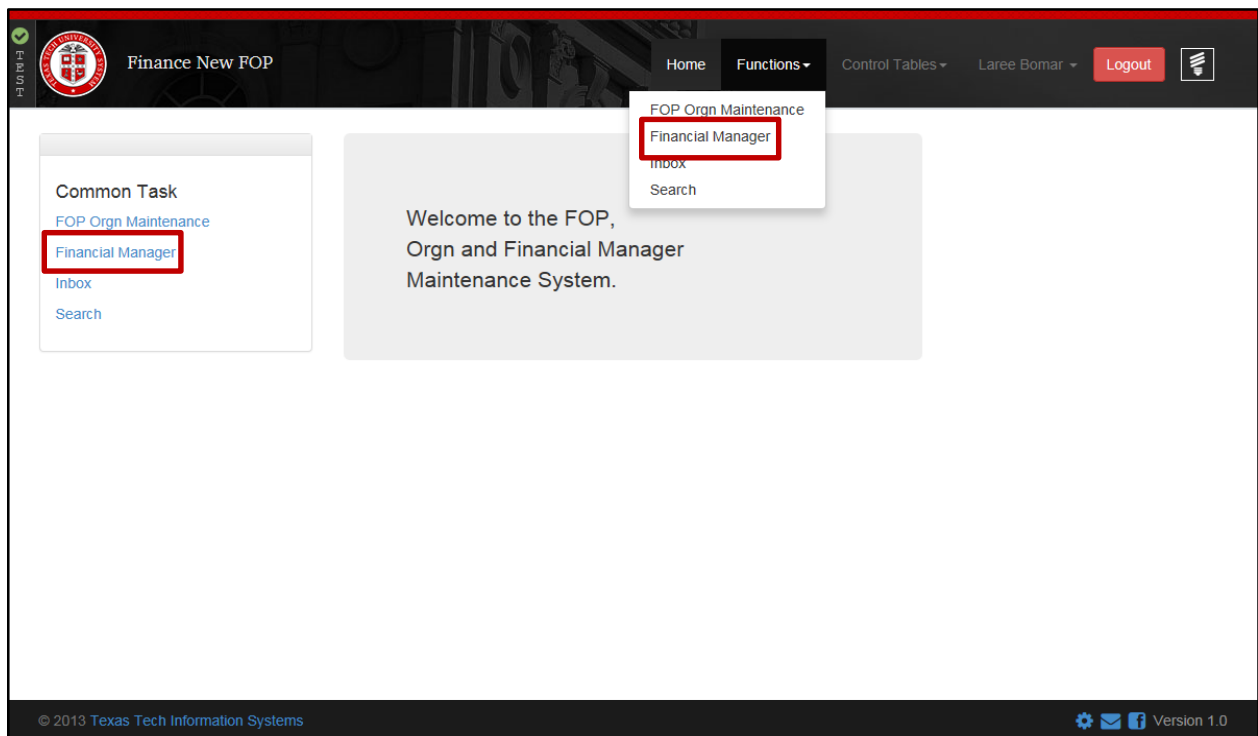
The Financial Manager Change Request allows a department to submit requests for Fund Manager or Orgn Manager changes. Once submitted, the request routes to both the From: Manager and To: Manager and a "Status" message will appear in the submitter's Inbox within the system. Upon approval, the change updates the Financial System.

Requests can be tracked through the Search feature where the status of the request can be viewed. Details about the change request are also available.

Note: The "FOP Orgn Maintenance" section of the Finance New FOP system will not be utilized by TTUHSC.

Submit a Fund or Orgn Manager Change Request

Upon accessing the Finance New FOP application select "Financial Manager" from the "Common Task" menu list on the left side of the page or the drop down list under "Functions".



Select the appropriate Chart of Accounts from the drop down list. Chart E should be selected for El Paso.

Financial Manager Change Request

Finance New FOP Home Functions Control Tables Laree Bomar Logout

Request Financial Manager Change

Chart: -- Select --
-- Select --
E - Texas Tech Univ Hlth Sci Ctr El Paso
H - Texas Tech Univ Health Sciences Ctr
S - Texas Tech University System
T - Texas Tech University

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In the “Current Financial Manager” box, enter the current Financial Manager’s R number or part of the last name. Search results will display a list of names or name from which to select. Select the proper name of the current Financial Manager.

Finance New FOP Home Functions Control Tables Laree Bomar Logout

Request Financial Manager Change

Chart: H - Texas Tech Univ Health Sciences Ctr

Current Financial Manager: wardroup|
Searching...

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Financial Manager Change Request

In the “New Financial Manager” box, enter the new Financial Manager’s R number or part of the last name. Search results will display a list of names or name from which to select. Select the proper name of the new Financial Manager.

The screenshot shows the 'Request Financial Manager Change' form in the Finance New FOP system. The interface includes a navigation bar with the Texas Tech University logo, 'Finance New FOP' title, and user menu for 'Laree Bomar'. The form fields are: 'Chart' (dropdown menu showing 'H - Texas Tech Univ Health Sciences Ctr'), 'Current Financial Manager' (text box with '[R00907170] Wardroup, Carole Kaye'), and 'New Financial Manager' (text box with 'Bomar' and a search dropdown showing 'Searching...'). A red 'Required' warning icon is next to the 'New Financial Manager' field. The footer contains '© 2013 Texas Tech Information Systems' and 'Version 1.0'.

A list of Funds and Orgns currently Managed by the current Financial Manager will be displayed.

Select the proper Fund/s or Orgn/s to be changed to the new Financial Manager. If all Funds or all Orgns currently managed by the person should be changed, click the “Select All” link at the top of each list.

Provide an explanation for the change request in the text box provided.

After selections are made, you can either “Save” to complete later, “Save and Submit” to send through approvals or “Cancel” to go back to the beginning of the change request.

Email notifications from the Finance New FOP system are sent to Fund Managers for each fund included in the Financial Manager Change Request notifying them that the request is in their queue for approval. After approval, the request for Fund Manager changes routes to Finance Systems Management for final review and processing and the request for Orgn Manager changes routes to the TTUHSC Budget Office.

Financial Manager Change Request

Request Financial Manager Change

Chart: H - Texas Tech Univ Health Sciences Ctr

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00522345] Bomar, A Laree

Funds Currently Managed by Carole Wardroup

Select All	Fund Code	Fund Title
<input type="checkbox"/>	101008	Finance Systems Management
<input checked="" type="checkbox"/>	181388	Finance Systems Management
<input type="checkbox"/>	181395	IDC Finance Systems Mgmt
<input type="checkbox"/>	221045	Property Management Support
<input type="checkbox"/>	9F1060	Business Affairs Equipment Purchase

Organizations Currently Managed by Carole Wardroup

Select All	Orgn Code	Orgn Title
<input type="checkbox"/>	201191	Property Management Lbk
<input type="checkbox"/>	201193	Finance Systems Mgmt Lbk

Explanation for Change Request:
Laree Bomar will now manage local fund 181388

Save Save and Submit Cancel

After submitting the request, a Status Message will appear and go to your Finance New FOP Inbox.

The message displays the Request ID, related information, Status and a link to view the request details.

The possible statuses are:

- P – Pending Approval
- R – Rejected
- A - Approved.

The approved requests will show in your Inbox for 7 days.

To view the details of the request, click on the “Details” link.

Financial Manager Change Request

The screenshot shows the 'Inbox' section of the Finance New FOP system. At the top, there is a navigation bar with 'Home', 'Functions', 'Control Tables', 'Laree Bomar', and a 'Logout' button. Below the navigation bar, the 'Inbox' title is displayed. A blue notification box contains the text: 'Your Financial Manager Change Request' and 'Status Codes - N has not been submitted - P is pending approvals - R is rejected - A is approved. Approved requests will show in your Inbox for 7 days.' Below this, a table lists the request details:

Request ID	Chart	Requester	Request Date	Current Manager	New Manager	Status	
363	H	A Bomar	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	P	Details

The details include approval routing and eligible approvers. Click "Close" to exit the details.

The screenshot shows the 'Details for Request : 363' window. The title is 'Financial Manager Change Request'. The requester is 'A Bomar' from the 'Finance Systems Mgmt Lbk' department, with a status of 'In Approvals'. The chart code is 'H'. The current financial manager is 'Wardroup, Carole Kaye' (ID: R00907170) and the new financial manager is 'Bomar, A Laree' (ID: R00522345). Below this, a table shows 'Funds Currently Managed by Carole Wardroup':

Fund Code	Fund Title	Status
181388	Finance Systems Management	SELECTED

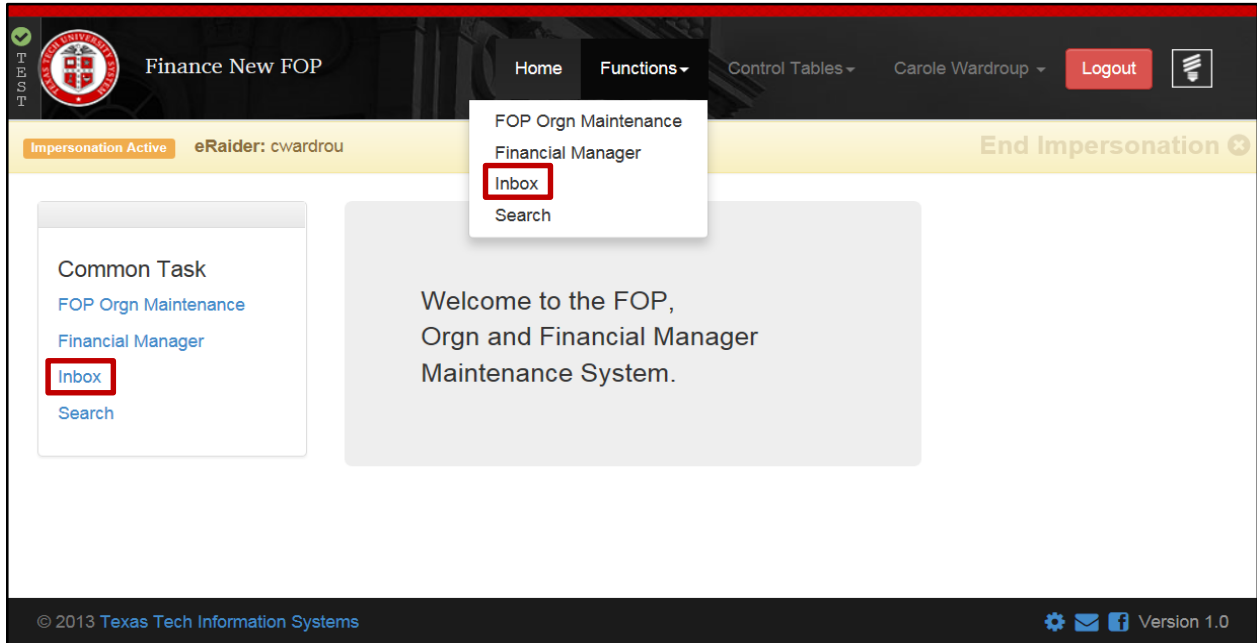
The explanation for the change request is: 'Laree Bomar will now manage local fund 181388'. The approval route is shown as 'From Fund Mgr' to 'To Fund Mgr' to 'HSC Accounting', initiated on 'Jul 2, 2015'. A table below shows the approval history:

Status	Started	Activity On	Approval Group	Approvers
Pending	7/2/15 3:04 PM		From Fund Mgr	Carole Wardroup
			To Fund Mgr	A Bomar
			HSC Accounting	Jillian Townsend, Carole Wardroup

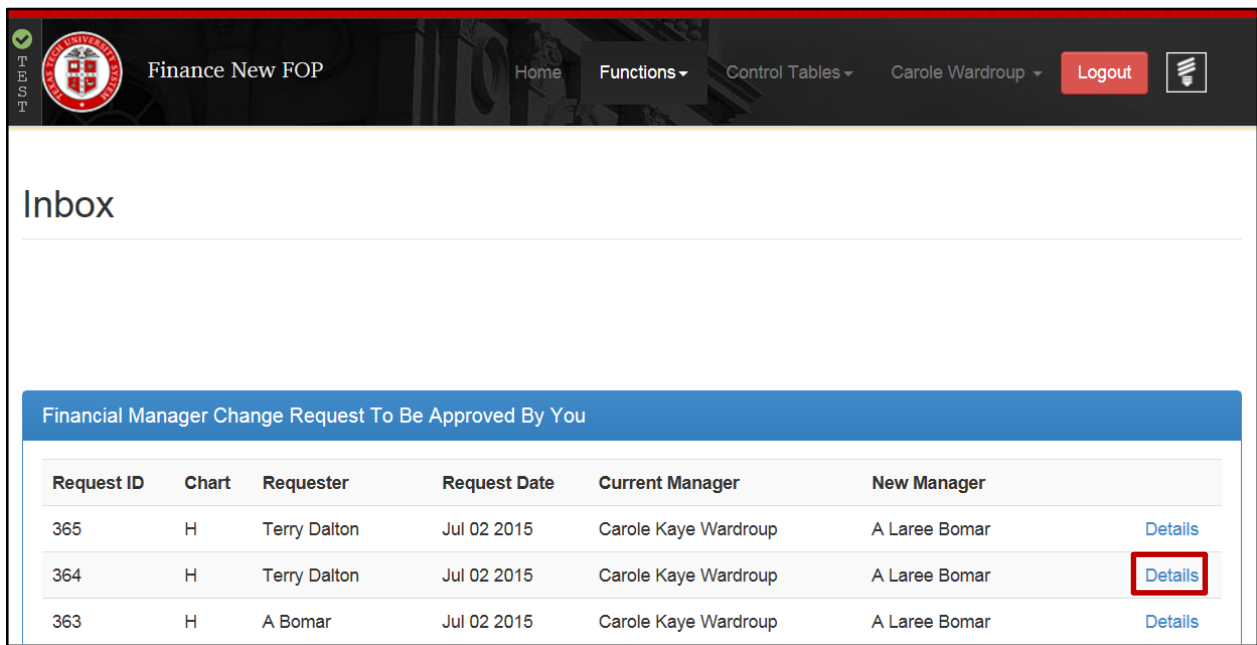
Financial Manager Change Request

Approve a Fund or Orgn Manager Change Request

Upon accessing the Finance New FOP application, click on your Inbox to review Financial Manager Change Requests for approval.



Click on the “Details’ link of the request that you need to approve.



Review the From: Fund Manager Name, the To: Fund Manager Name and the Explanation for the fund listed in the change request. If all information is correct, click the “Approve” button. If the information is not correct or the request is not valid, click the red “Reject” button.

Financial Manager Change Request

Details for Request : 364
Financial Manager Change Request
Requester - Terry Dalton
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00522345] Bomar, A Laree

Funds Currently Managed by Carole Wardroup

Select All	Fund Code	Fund Title	Status
<input type="checkbox"/>	101008	Finance Systems Management	
PENDING	181388	Finance Systems Management	
<input type="checkbox"/>	181395	IDC Finance Systems Mgmt	
<input checked="" type="checkbox"/>	221045	Property Management Support	SELECTED
<input type="checkbox"/>	9F1060	Business Affairs Equipment Purchase	

Explanation for Change Request:
Laree Bomar will manage this fund and Orgn now

Approval Route: From Fund Mgr To Fund Mgr HSC Accounting Initiated On: Jul 2, 2015

Status	Started	Activity On	Approval Group	Approvers
Pending	7/2/15 3:14 PM		From Fund Mgr	Carole Wardroup
			To Fund Mgr	A Bomar
			HSC Accounting	Jillian Townsend, Carole Wardroup

Approver Notes:

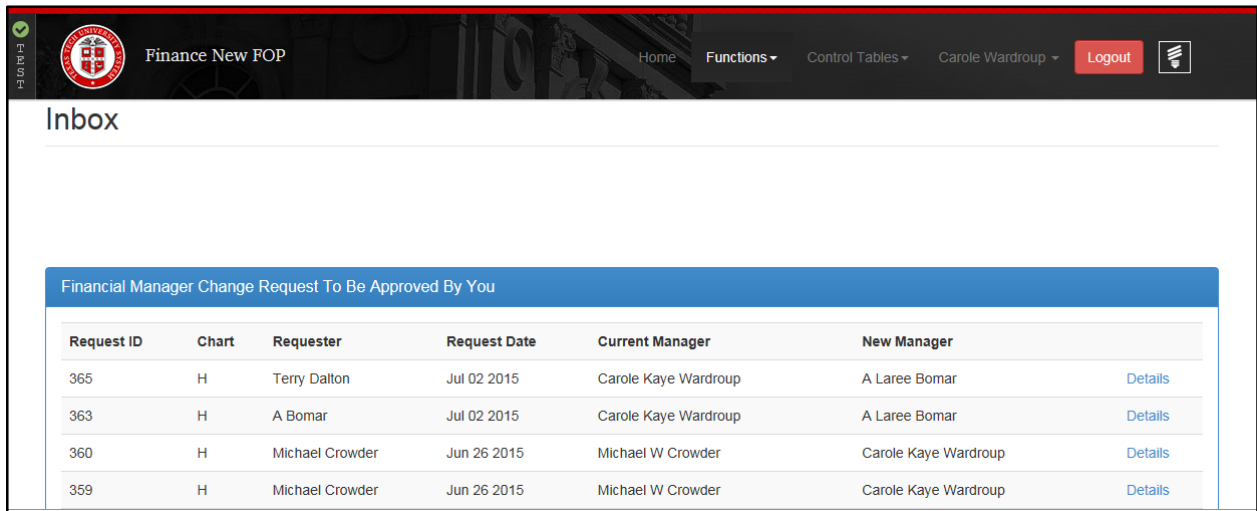
(Note: Rejection requires notes.)

After you have approved the request, the next approver in the queue is notified to approve the request.

After all approvals are complete, the request will update the Financial System and you will see the changes reflected in Cognos and the TEAM application the next day.

Financial Manager Change Request

After you have approved the request, it will no longer be in your Inbox for approval.

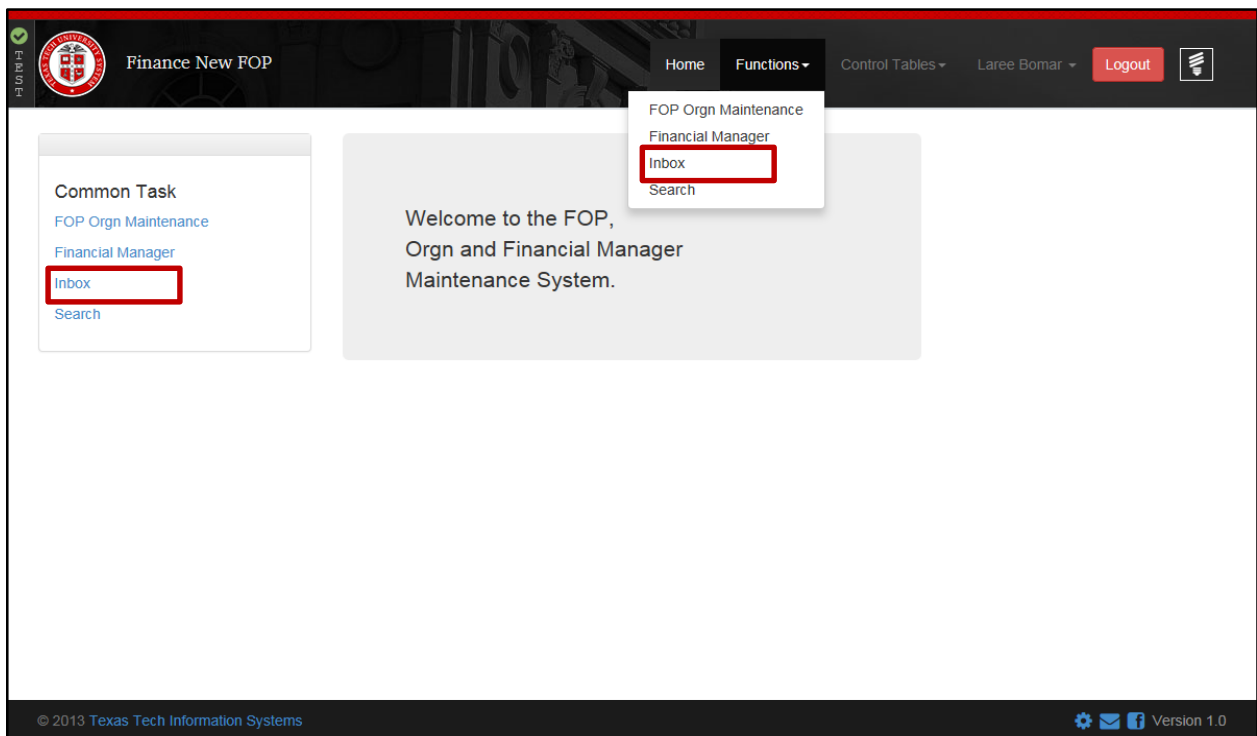


The screenshot shows the 'Inbox' page in the Finance New FOP system. The page title is 'Inbox'. Below the title, there is a blue header for the table: 'Financial Manager Change Request To Be Approved By You'. The table has the following columns: Request ID, Chart, Requester, Request Date, Current Manager, and New Manager. Each row includes a 'Details' link.

Request ID	Chart	Requester	Request Date	Current Manager	New Manager	
365	H	Terry Dalton	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	Details
363	H	A Bomar	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	Details
360	H	Michael Crowder	Jun 26 2015	Michael W Crowder	Carole Kaye Wardroup	Details
359	H	Michael Crowder	Jun 26 2015	Michael W Crowder	Carole Kaye Wardroup	Details

Manage Your Inbox

Access your Inbox from either the menu list on the left side of the page or from the "Functions" drop down list at the top of the page.



The screenshot shows the 'Functions' dropdown menu open, with 'Inbox' highlighted. The left sidebar also has 'Inbox' highlighted. The main content area displays a welcome message: 'Welcome to the FOP, Orgn and Financial Manager Maintenance System.'

A list of your Financial Manager Change Requests is displayed with the Request ID, related information, Status and a link to view the request Details.

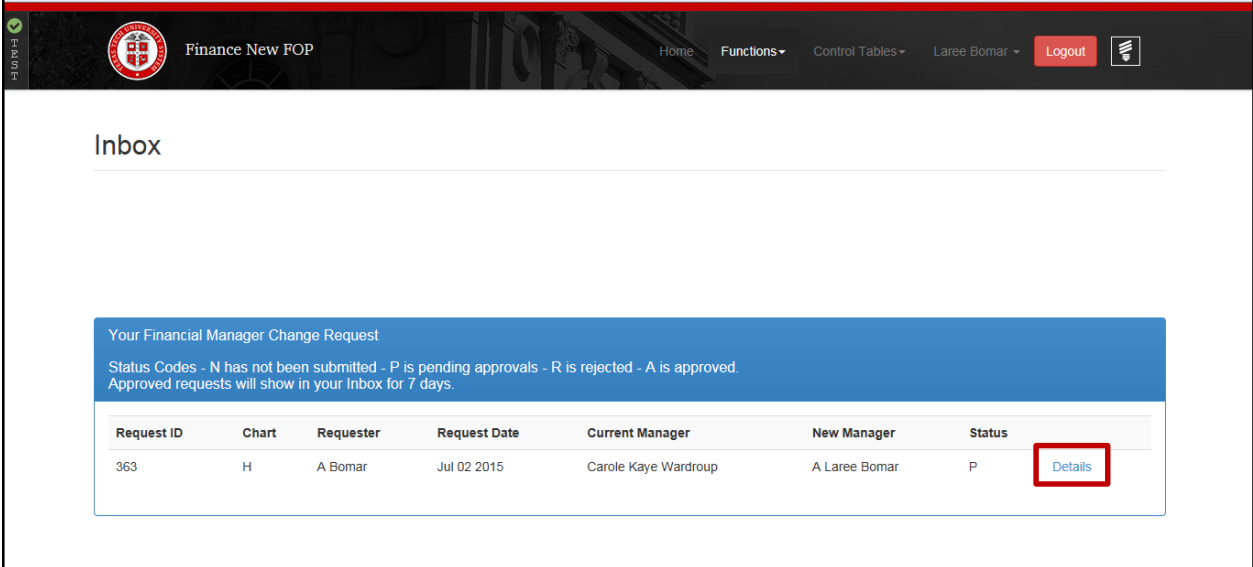
Financial Manager Change Request

The possible statuses are:

- P – Pending Approval
- R – Rejected
- A - Approved.

The approved requests will show in your Inbox for 7 days.

To view the details of the change request, click on the “Details” link.



The screenshot shows the 'Finance New FOP' system interface. At the top, there is a navigation bar with 'Home', 'Functions', 'Control Tables', 'Laree Bomar', and a 'Logout' button. The main content area is titled 'Inbox'. Below the title, there is a blue informational box with the text: 'Your Financial Manager Change Request' and 'Status Codes - N has not been submitted - P is pending approvals - R is rejected - A is approved. Approved requests will show in your Inbox for 7 days.' Below this box is a table with the following data:

Request ID	Chart	Requester	Request Date	Current Manager	New Manager	Status	
363	H	A Bomar	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	P	Details

Financial Manager Change Request

Click "Close" to exit the details.

Details for Request : 363
Financial Manager Change Request
Requester - A Bomar
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00522345] Bomar, A Laree

Funds Currently Managed by Carole Wardroup

Fund Code	Fund Title	Status
181388	Finance Systems Management	SELECTED

Explanation for Change Request:
Laree Bomar will now manage local fund 181388

Approval Route: From Fund Mgr To Fund Mgr HSC Accounting Initiated On: Jul 2, 2015

Status	Started	Activity On	Approval Group	Approvers
Pending	7/2/15 3:04 PM		From Fund Mgr	Carole Wardroup
			To Fund Mgr	A Bomar
			HSC Accounting	Jillian Townsend, Carole Wardroup

[Close](#)

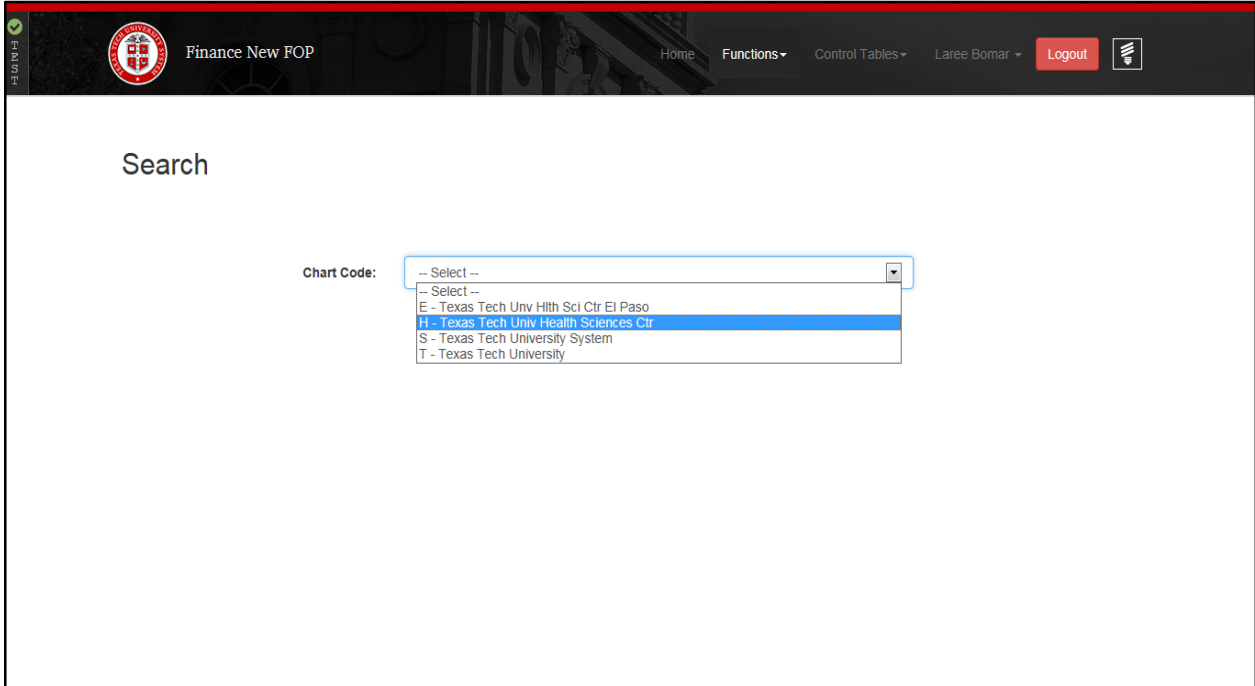
Search

To use the "Search" feature click on the "Search" link in the menu list on the left side of the page or from the drop down list under "Functions" at the top of the page.

The screenshot shows the Finance New FOP interface. At the top, there is a navigation bar with "Home", "Functions", "Control Tables", "Laree Bomar", and "Logout". The "Functions" dropdown menu is open, showing "FOP Orgn Maintenance", "Financial Manager", "Inbox", and "Search", with "Search" highlighted by a red box. On the left side, there is a "Common Task" section with links for "FOP Orgn Maintenance", "Financial Manager", "Inbox", and "Search", with "Search" also highlighted by a red box. The main content area displays a welcome message: "Welcome to the FOP, Orgn and Financial Manager Maintenance System."

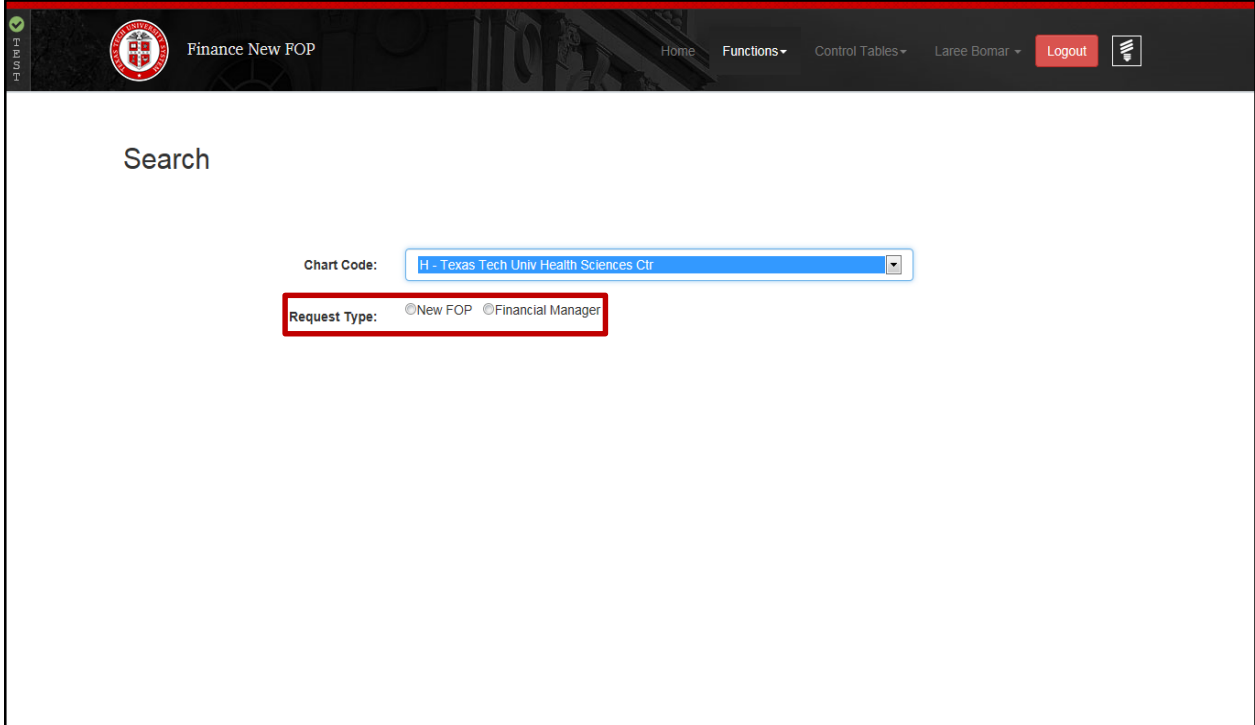
Financial Manager Change Request

Select the appropriate Chart of Accounts from the drop down list in the Chart Code box. Chart E should be selected for El Paso.



The screenshot shows the 'Finance New FOP' search interface. The 'Chart Code' dropdown menu is open, displaying the following options: -- Select --, -- Select --, E - Texas Tech Univ Hlth Sci Ctr El Paso, H - Texas Tech Univ Health Sciences Ctr (highlighted in blue), S - Texas Tech University System, and T - Texas Tech University.

Select the type of request that you wish to search.



The screenshot shows the 'Finance New FOP' search interface. The 'Chart Code' dropdown menu is set to 'H - Texas Tech Univ Health Sciences Ctr'. Below it, the 'Request Type' section has two radio buttons: 'New FOP' and 'Financial Manager'. The 'Request Type' label and both radio buttons are enclosed in a red rectangular box.

Financial Manager Change Request

Select either a status type or "All".

The screenshot shows the 'Finance New FOP' search interface. The 'Chart Code' is set to 'H - Texas Tech Univ Health Sciences Ctr'. The 'Request Type' is 'Financial Manager'. The 'Status' filter is highlighted with a red box and includes options: Approved, Error, New, Rejected, Submitted, and All.

A list of all requests is displayed based on the selections from the prior screens. The requests are sorted by Request ID.

The screenshot shows the 'Finance New FOP' search interface with a list of requests. The 'Status' filter is now 'Submitted'. A 'Clear Filters' button is visible. Below the filters is a table of requests.

Request ID	Requester	Request Date	Current Manager	New Manager	Approval Waiting On	Status	
363	A Bomar	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar		P	Details
360	Michael Crowder	Jun 26 2015	Michael W Crowder	Carole Kaye Wardroup		P	Details
359	Michael Crowder	Jun 26 2015	Michael W Crowder	Carole Kaye Wardroup		P	Details
356	Lesley Wilmeth	Jun 23 2015	Leandra D Flores	Lesley Rena Wilmeth		P	Details

Financial Manager Change Request

You can filter any column with a filter field at the top of each column. You can search for a single date or a range of dates by entering both the begin date and the end date. Only those requests that meet the entered criteria will be displayed.

To view the details of a change request, click on the “Details” link.

The screenshot shows the 'Finance New FOP' web application interface. At the top, there is a navigation bar with 'Home', 'Functions', 'Control Tables', 'Laree Bomar', and a 'Logout' button. Below the navigation bar is a 'Search' section with the following filters:

- Chart Code:** H - Texas Tech Univ Health Sciences Ctr
- Request Type:** New FOP Financial Manager
- Status:** Approved Error New Rejected Submitted All

A 'Clear Filters' button is located below the filters. Below the filters is a table with columns: Request ID, Requester, Request Date, Current Manager, New Manager, Approval Waiting On, and Status. The table contains three rows of data. A red box highlights the 'Request Date' filter fields, which are set to 'Jul 01 2015' and 'Jul 06 2015'. Another red box highlights the 'Details' links in the 'Status' column for the three rows of data.

Request ID	Requester	Request Date	Current Manager	New Manager	Approval Waiting On	Status
365	Terry Dalton	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	P	Details
364	Terry Dalton	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	P	Details
363	A Bomar	Jul 02 2015	Carole Kaye Wardroup	A Laree Bomar	P	Details

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Financial Manager Change Request

To exit the details, click the “Close” button.

Details for Request : 363
Financial Manager Change Request
Requester - A Bomar
Requester Department - Finance Systems Mgmt Lbk
Status - In Approvals

Chart Code: H

Current Financial Manager: [R00907170] Wardroup, Carole Kaye

New Financial Manager: [R00522345] Bomar, A Laree

Funds Currently Managed by Carole Wardroup

Fund Code	Fund Title	Status
181388	Finance Systems Management	SELECTED

Explanation for Change Request:
Laree Bomar will now manage local fund 181388

Approval Route: Initiated On: Jul 2, 2015

From Fund Mgr To Fund Mgr HSC Accounting

Status	Started	Activity On	Approval Group	Approvers
Pending	7/2/15 3:04 PM		From Fund Mgr	Carole Wardroup
			To Fund Mgr	A Bomar
			HSC Accounting	Jillian Townsend, Carole Wardroup

Close

To return to the main page, click on the “Home” link at the top of the page. To exit the system, click the red “Logout” button at the top right of the page.

Finance New FOP

Home Functions Control Tables Laree Bomar Logout

Common Task
FOP Orgn Maintenance
Financial Manager
Inbox
Search

Welcome to the FOP,
Orgn and Financial Manager
Maintenance System.

If you have questions, contact Finance Systems Management at fsmelp@ttuhsc.edu.