CCOA Administration

Enterprise Data Management (EDM)

EDM is a tool UCSB will use to administer the Common Chart of Accounts (CCOA) segment values, attributes, and hierarchies, and to synchronize these between all Oracle Financials Cloud modules and boundary systems. Additionally, it is used to map legacy COA segments to the new CCOA to reflect historical data in OFC.

Process for Requesting a New Segment Value

Departments can request new values for the Fund, FRU, Account, Program, Activity, and Campus Commitment segments:

- Departments Start Here
- Google Form filled out by dept. financial manager or equivalent
- Google Form reviewed and approved by Dean or equivalent
- Google Form reviewed by Divisional Control Point
- If approved, control point enters request into EDM system
- Formal review in EDM by central offices
- BFS: Approve
- Budget & Planning: Notify
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Key Benefits

- One location for managing the CCOA master data
- Manages CCOA hierarchies, including alternate hierarchies that can be used for campus reporting needs
- Synchronizes CCOA values between multiple systems
- Tracks chartfield changes
- Validates chartfield data, providing consistency checks when new values are added
- Manages the mapping of legacy COA values to the CCOA

Key Changes

- New processes for requesting new chartfield values (or changes to chartfield values) through the divisional control points
- Improved visibility and consistency of the chart structure

Visit financemanagement.ucsb.edu to learn more