Requesting a Change to a Source

Overview

Over a period of time, it may be necessary to modify a source. Typical changes include updates to source documentation or a new responsible person. To change the source, the requester opens the existing source and selects the change option. The system creates a new row in the source record, where the changes are applied and go through the approval workflow.

Related Reference

- For broader context, see Overview for Source Create.

Menu Path

Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source

Steps - Requesting a New Source

Follow these steps to change a source:

1. Choose this menu option:

   Main Menu > Finance Menu > UNC Campus > Source Create > Source Request > Add/Change Source

2. Click on the **Finding an Existing Value** tab.

3. Complete the fields:

In this field:	Do the following:
Business Unit	Enter **uncch** for the University or a foundation business unit.
Request Category	Look up or enter the request category to refine your search results.
Request Type	Look up, or enter, the request type to refine your search results.
Request ID	Look up, or enter, the request ID to refine your search results.
Source	Look up, or enter, the Source to refine your search results.
Status	Look up, or enter, the status to refine your search results.
Requester ID	Look up, or enter, the requester id to refine your search results.

4. Click the SEARCH button
5. Click on the source you need to change.

6. Click the **Source Request** tab.

Result: The system displays the Source Request tab.

***NOTE**: The status of the source you are changing has to be "University Controller Approved" before you can complete a change request.*

Source Request Tab

1. Click on the **Add a Change Request** link.

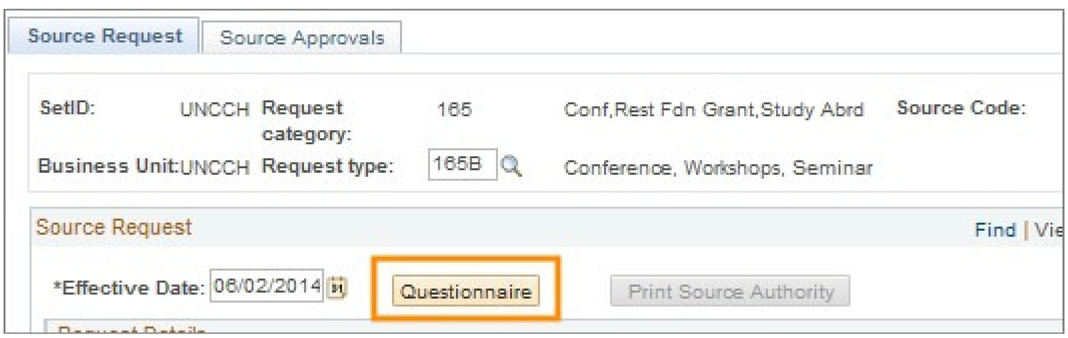
   The system copies the information from the original source record into a new record, creating an additional row. The status changes to In Progress.

2. Complete the field:

In this field:	Do the following:
Effective Date	Leave the default value of today's date. Note: This is the date the source request is entered into the system, and not the source and fund authority effective date, which is the date that the University Controller signs off on the new source.

3. Based on the request category and request type you entered, you may need to complete a questionnaire. If the system displays it, click on the **Questionnaire** button. Otherwise, skip this step.

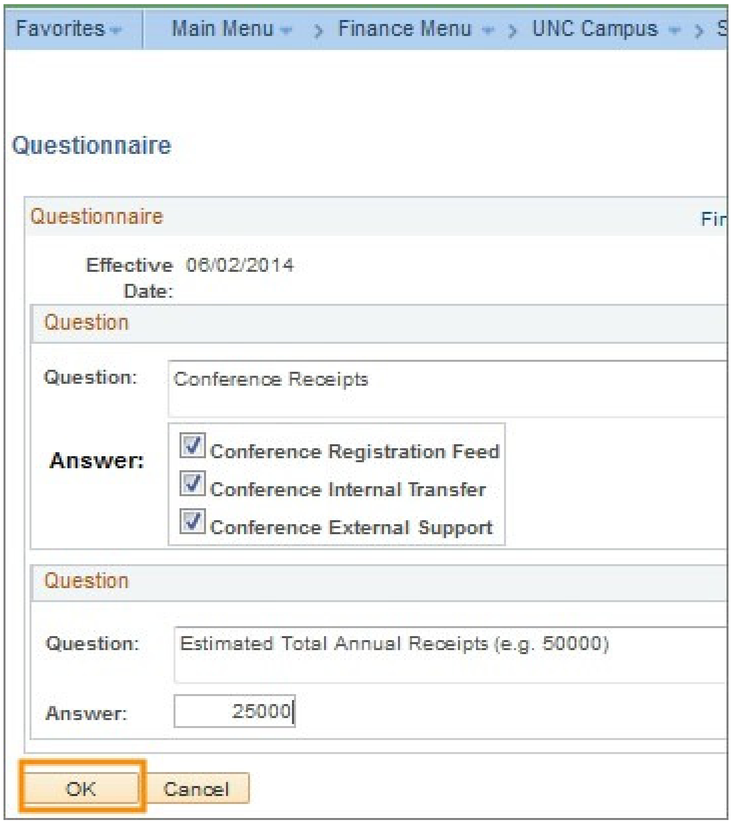
   Result: The system displays the questionnaire to be completed. Questionnaires are associated with the request type.



4. If you clicked on the Questionnaire button, complete the fields to answer the questions. Otherwise, skip this step.

   Note: The questions on the questionnaire vary based on your request type and the source and fund authority's requirements.

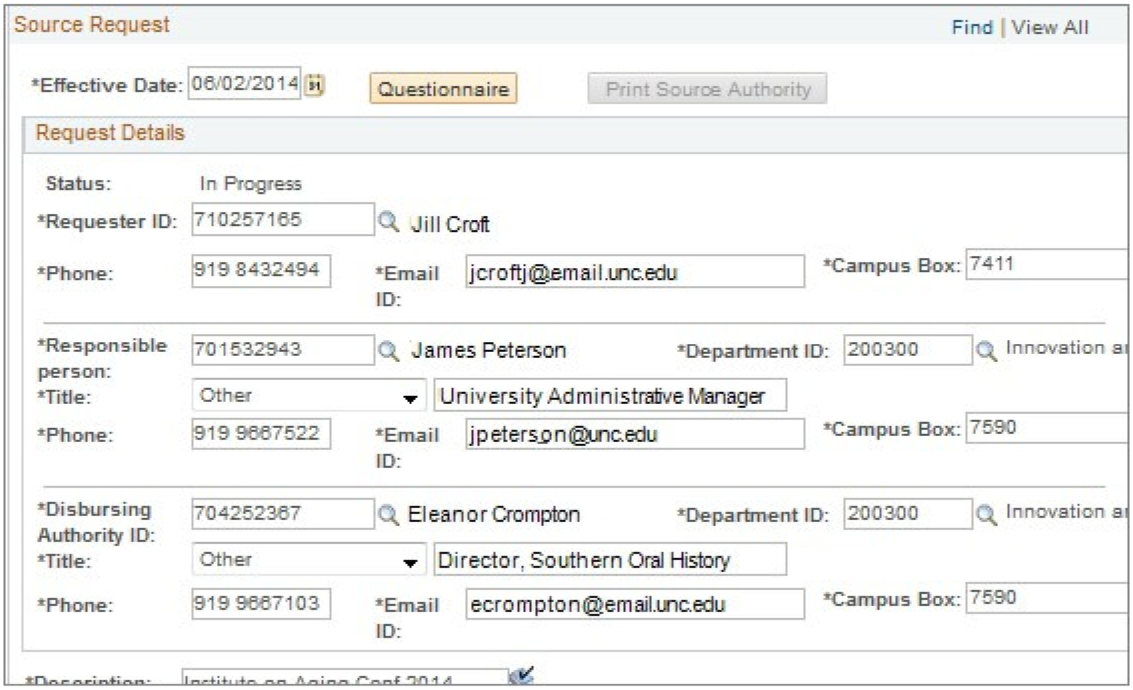
5. Click **OK**.



6. In the Request Details section, complete the fields:

In this field:	Do the following:
Requestor Id	Enter the requestor's information.
Phone	Enter the requestor's phone number.
Email ID	Enter the requestor's email.
Campus Box	Enter the requestor's campus box.
Responsible Person	Enter the responsible person's information.
Title	Enter the responsible person's title.
Phone	Enter the responsible person's phone number.
Email ID	Enter the responsible person's email.
Campus Box	Enter the responsible person's campus box.
Department ID	Enter the responsible person's department ID.
Disbursing Authority ID:	Enter the disbursing authority ID
Title	Enter the disbursing authority's title.
Phone	Enter the disbursing authority's phone number.

In this field:	Do the following:
Email ID	Enter the disbursing authority's email.
Campus Box	Enter the disbursing authority's campus box.
Department ID	Enter the disbursing authority's department ID.

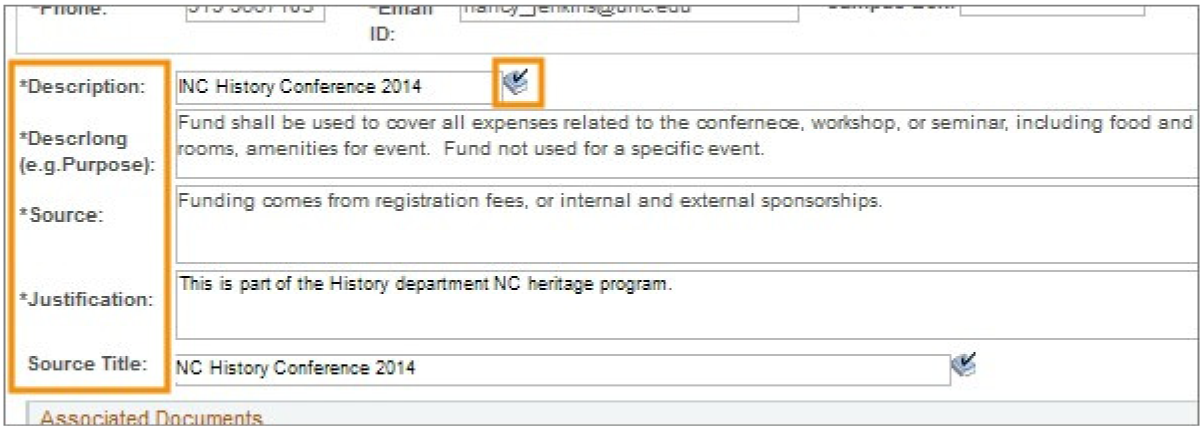


7. Beneath the Request Details section, complete the fields as necessary:

In this field:	Do the following:
Description	Enter the description. Note: This is limited to 30 characters. See XXXX for naming conventions. (To be provided by Kathi Wimmer.)
Descriong	Enter the long description. Note:Based on the request type, this field displays standard text that is editable.
Source	Enter the source indicating where the money comes from

In this field:	Do the following:
Justification	Enter the justification.
Source Title	Enter the source title. This is a seventy character field, which is printed on the Source and Fund Authority document.

Note: There is a spell check feature available in the above fields.

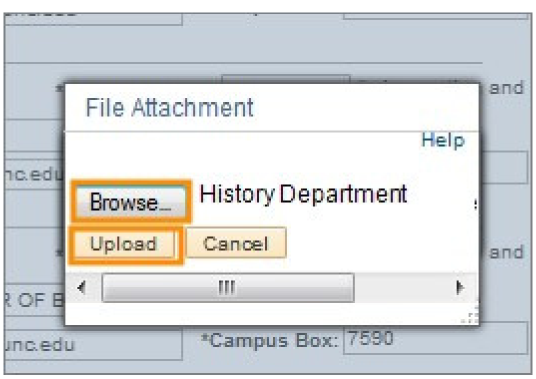


8. In the Associated Documents section, click the **Attach** button to add a required document.

9. Click on the **Browse** button to select a file.

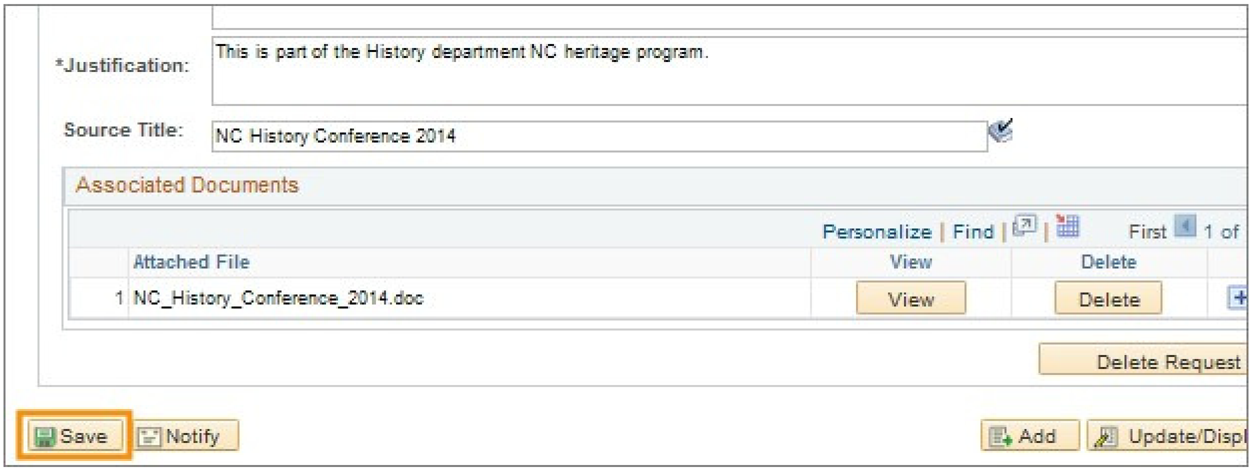
10. Click on the **Upload** button to attach the file.

Note: At least one attachment is required for all source request changes. These documents include updated development office notes, donor letters, terms, instructions, and so on. File attachments include .png, jpeg, .ppt and so on.



Result: The system displays the attached file.

11. Click on the **Save** button.

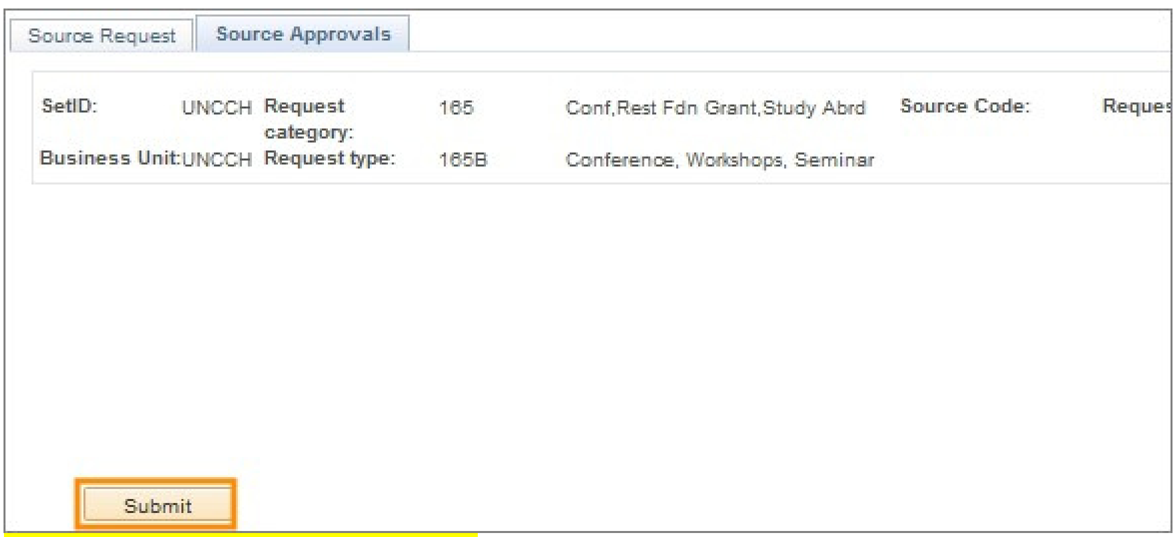


12. Click on the Source **Approvals** tab.

The system displays the approval workflow for the original source request.

Source Approvals Tab

1. Click on the **Submit** button to forward the request for departmental approval.



this needs to be a different screen shot.

Result: The system displays the approval workflow for this change source request.