



# Data Field Changes for Financial Systems

Lawrence Berkeley  
National Laboratory

Financial Policies and Procedures

Part II

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Primary contact:	General Accounting Manager

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## Summary

The purpose of this policy is to establish guidelines for initiating changes (add/activate, close/inactivate or modify) to data fields in PeopleSoft Financial Management Systems to ensure consistency, data integrity and control.

## Policy

Whenever a data field needs to be changed, the requestor completes the relevant form (see [FMS Data Field Change](#) forms), obtains the signature of the requesting department, and approval from the General Accounting Manager. Each signature is obtained as a digital signature, which allows for electronic distribution for all forms.

## Procedures

It is the responsibility of the requesting and approving managers to thoroughly analyze the impact of the proposed change on functional and business practices, systems and reporting requirements. Upon completion of the impact analysis, complete the appropriate change request form and route for further approvals. The form is to be routed electronically attaching the digital signatures from the appropriate approvers.

Analysts from Business Systems Analysis (BSA) or the General Accounting system administrator may be required to further analyze and document the impacts of the proposed change prior to implementation. Wherever required, the BSA analyst or system administrator also obtains input from Information Technology - Business Systems programmers.

The General Accounting Manager has final approval. Once approved, the General Accounting Manager forwards the completed form electronically to the General Accounting system administrator to complete.

Upon receipt, the system administrator implements the requested change in the PeopleSoft Financial Management System (FMS) and communicates the changes to all appropriate parties.

## Financial Policies and Procedures Manual

### Contacts

General Accounting Manager

### Glossary

**Data fields:** B & R, Fund Code, GL Account, Management Analysis and Reporting Systems (MARS) code, Resource Type, Resource Category, and Project Type

### Related documents

[FMS Data Field Change](#) forms