Department ID (deptID) Management

# Purpose

This document will provide an overview of how the University of Alberta uses deptIDs within the PeopleSoft applications. As well, this document will provide an understanding of how deptIDs are managed and maintained.

# Purpose of deptIDs

DeptIDs reflect the University’s organizational hierarchy. DeptIDs are managed and maintained within the 3 PeopleSoft applications:

* Campus Solutions (CS)
* Financials
* Human Capital Management (HCM)

All three PeopleSoft applications are synced together with HCM being the source or master record. This means changes made in HCM are copied to Financials and CS.

## DeptID for Chart of Accounts

DeptIDs are a systematic representation of the University’s organizational hierarchy and therefore represent levels of accountability and budgetary control. A deptID has ongoing activity (revenue and/or expenditure) and will have a corresponding budget plan.

## DeptIDs used in Organizational Structure

In HCM and CS, deptIDs are used to manage people. In HCM the deptID forms part of the Job or POI (Person of Interest) record for a person. HCM also uses deptIDs to control security access. Ensuring appropriate security access to sensitive information, such as salary and personal information, is critical to the University.

In addition, HCM uses deptIDs to produce legislated reports such as Statistics Canada, Federal Contractors Reports, etc.

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# Attributes of a DeptID

All deptIDs must follow a specific structure to ensure consistency. It is important to understand the attributes of a deptID when requesting a new deptID or requesting changes to an existing deptID.

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| --- | --- |
| **Attribute** | **Description** |
| DeptID | 6 digit number manually assigned by the business area |
| Effective Date | Date the deptID was created or the date that changes were made to an existing deptID |
| Status | A - Active; I - Inactive |
| Department Name (DeptID Name) | 30 Characters  This name is reflected in financial reports.  \*Refer to the section regarding Naming Convention Standards within this document |
| Long Name | 100 Characters  This name is reflected on some HCM reports and other HR related applications. |
| Manager ID | 7 Characters  The employee must be active as of the Effective Date.  Manager ID identifies the budget owner (e.g. Dean, Chair, Director) |

## Effective Date

To preserve historical data PeopleSoft uses effective dates.

New deptIDs

* Effective Date = April 1 of the Fiscal Year

Changes to deptIDs

* Effective Date = 1st of the Month
* Changes could be requested for Name, Department Manager ID, Status, Location, Tax and Statistics Canada information.

## DeptID Naming Convention Standard

Naming deptIDs/faculties consistently, logically and in a standardized way will remove ambiguity and or duplicates across systems. Naming conventions mainly facilitate better identification/recognition, and also lend to meaningful descriptions on reports.

A common set of rules and standards have been created and apply to the naming of deptIDs/faculties for all University units, whether they are administrative or academic units.

**DeptID Naming Standards are as follows.**

* To improve clarity and recognition, the descriptive portion of the title usually appears first. Short titles (30 chars) are used on screens or reports where space is limited or where the context does not require a full title. In certain listings, shorter titles may be more concise and easier to read. The goal is to make the short title as recognizable as possible within 30 characters.
* The Department/faculty Code is a three character code that is selected by the department. Listed in uppercase, abbreviated 2-4 characters

Examples:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name** | **Faculty Code** |  | **Name** | **Faculty Code** |
| Administration | ADM |  | Nursing | NUR |
| Advancement/Development | VAD |  | Pharmacy & Pharmaceutical Sc | PPS |
| Agricultural Life & Envir Sc | ALE |  | Physical Ed & Recreation | PER |
| Alberta School of Business | BUS |  | President | PRE |
| Arts | ART |  | Provost & VP (Academic) | VPA |
| Audit and Analysis | ASA |  | Registrar's Office | REG |
| Augustana Campus | AUG |  | Rehabilitation Medicine | REM |
| Campus Saint-Jean | CSJ |  | Research Services Office | RSO |
| Education | EDU |  | Risk Management Services | RMS |
| Engineering | ENG |  | School of Public Health | SPH |
| Extension | EXT |  | Science | SCI |
| Finance Services | FIN |  | Student Services | SS |
| Graduate Studies & Research | GSR |  | Supply Management Services | SMS |
| Human Resource Services | HRS |  | University AB International | UAI |
| Information Services & Tech | IST |  | Vice-President (Research) | VRS |
| Law | LAW |  | VP (Advancement) | ADV |
| Libraries | LIB |  | VP (Facilities & Operations) | VFO |
| Medicine & Dentistry | MED |  | VP (Finance & Administration) | VFA |
| Native Studies | NAS |  | VP (University Relations) | VUR |
| Non-University | NON |  |  |  |

* Departments/Divisions— write out in full, capitalize/uppercase and use the official name on first reference; lowercase for shortened, subsequent references

**Punctuations: Abbreviations, Initialisms & Capitalization**

* Spell out all words if possible; otherwise, use standard abbreviations (as per the Oxford English Dictionary, Canadian press style guide).

|  |  |
| --- | --- |
| **Word** | **Abbreviation** |
| Division | Div |
| Development | Devt |
| University | Univ |
| Faculty | FAC |

* Capitalize the first letter of only the official and complete names of colleges, schools, departments, divisions, administrative unit and offices. Capitalize when it's clear the reference is to a faculty or department rather than a field or discipline; lowercase the partial or informal version.

Examples:

|  |  |  |
| --- | --- | --- |
| **D**epartment of **S**ociology | **S**chool of **M**echanical **E**ngineering | **H**uman **R**esource **S**ervices |

## Long Name

The Long Name fields is used to expand on the Department Name field. This field allows for a description that is 100 characters including spaces. This name appears on some HCM Reports and can be used in other HR applications.

## Manager ID

The Manager ID field identifies the budget owner of the deptID by their Employee ID (also referred to as EMPLID). There are several uses for this field.

In Financials, Manager ID identifies the budget owner.

In HCM, the Manager ID is used as a backup approval for Time and Labour. Approvals are first routed to an employee's Supervisor, but in cases where the supervisor is no longer active, the approval is routed to the Department Manager.

In HCM deptIDs are also used for organizational purposes, and employees may be paid by different departments. The routing will follow the Organizational Department on the Job record, not the financial record.

**Important!**: The Manager ID must be an active Employee as of the effective date of the deptID.

When setting up a new deptID, the effective date is April 1 of the fiscal year. If the Budget Owner started employment on May 1, you must assign another person who was active from April 1 - April 30 to be the Manager. Then a change would be submitted effective May 1, with the New Employee as the budget owner.

# DeptID Security

HCM uses security levels to ensure that sensitive employee information such as salaries, social insurance numbers, birthdates and other demographic and job data is secure. This is accomplished through the Department Security Tree.

Each deptID is added to the Department Security Tree and must fall under an existing deptID called the parent deptID. By default the parent deptID will have access to view employees in any deptID below them, commonly known as child deptIDs. If a deptID is not in the tree, employees in the department will not be visible to anyone.

HCM users may have access to one or more deptID levels and, by default, the associated child deptIDs. For this reason, security and access should be carefully considered when selecting a parent deptID to where the new deptID will be attached.

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# DeptID Request Approvals

Senior Financial Officer (SFO) from Faculties and Central Services Units are authorized to request a new deptID, Change deptID or Inactivate a deptID.

Financial Services (FS) will review and approve any request by the SFO and if approved the forms will be sent to HRS for further action. If FS has any questions, they will contact the SFO.

Human Resource Services (HRS) will review and complete the form for the HRS input fields and add to PeopleSoft. If HRS has any questions, they will contact the SFO.

IST will create new departments in HCM, which will sync to FS and CS. In addition IST will make any Department Security Tree changes. IST will notify FS, HCM and CS. At this point, FS will add new departments to Financials Department Trees (e.g. COA\_DEPT\_DETAIL).

New deptIDs or changes to deptIDs will be processed with 10 business days. FS or HRS will contact the SFO if this deadline cannot be met.

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# Contact Information

For questions regarding this document, contact your HR Contact: <http://www.hrs.ualberta.ca/FindYourHRContact.aspx>

For further information on Financials deptID, refer to Guide Chapter 4: Chart of Accounts (COA): <http://www.financial.ualberta.ca/GuideToFinancialManagement.aspx>

The COA deptID forms can be found on Financial Services Forms Cabinet: <http://www.financial.ualberta.ca/FormsCabinet.aspx>