

Work Instruction

FMSC - Display Department Head for a Funds Center (Document)

**FMSC, SBWP,
ZSEDEPTAUT
H000, FM2G**

Purpose

Use this procedure to determine the department head for a funds center.

Trigger

Most processes in IRIS require the approval of the delegated departmental approver as listed in the **ZAPPS – Display Approvers/Reviewer Responsibilities** transaction. However, there are a few processes in IRIS for which the approval workflow depends on the department head rather than the delegated departmental approver. Those processes include:

- Requests for IRIS access submitted in the **ZSEDEPTAUTH000 – Departmental User Request** transaction.

Because the **ZSEDEPTAUTH000** transaction is the means by which delegated departmental approval and substitute approvers are established, the department head must be the person to approve departmental access.



See Fiscal Policy *FI0150 – Approvals* for more information on the requirements for delegation of departmental approval.

- Travel requests submitted for department heads in the **TRIP – Travel Manager** transaction.

If a traveler is listed as the department head for any funds center, any travel request submitted for him/her must be approved by his/her supervisor in addition to the normal departmental approval.



See Section 113 of Fiscal Policy *FI0750 – Travel* for more information on the requirements for approval of travel for department heads.

Menu Path

Use the following menu path to begin this transaction:

- Select **Accounting → Public Sector Management → Funds Management → Master Data → Account Assignment Elements → Funds Center → Individual Processing → FMSC – Display** to go to the *Display Funds Center in FM Area* screen.

Transaction Code

FMSC, SBWP, ZSEDEPTAUTH000, FM2G

Helpful Hints

- The *Funds Center Display* screen contains two fields that appear to be similar: *Department Head* and *Person responsible*. It is only the *Department Head* field that is used for department head approvals. Although the *Department Head* and *Person responsible* often may be the same, they also may be different.



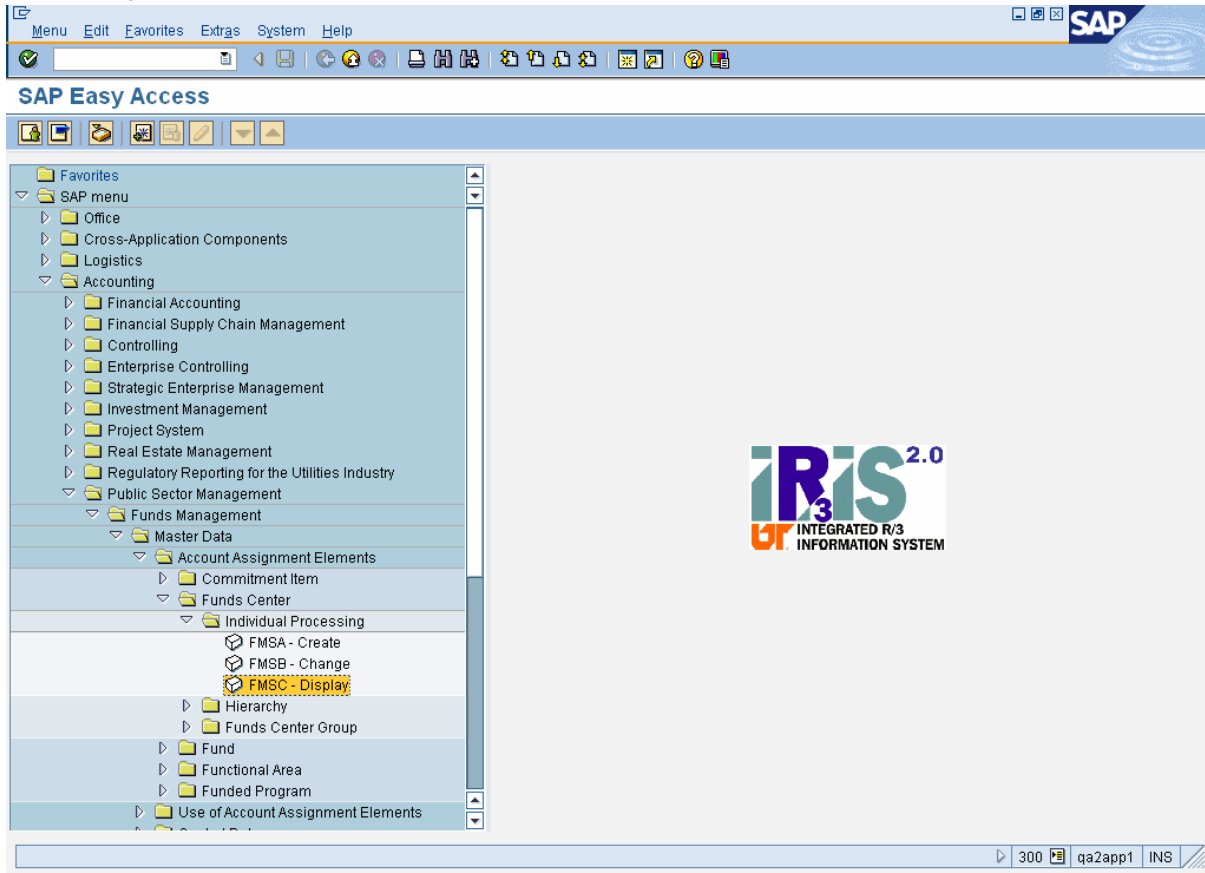
If the information in either the *Department Head* field or the *Person responsible* field needs to be updated, contact the Controller's Office to request the change.


- The person listed as the department head on the funds center will receive work items only if that person is an active IRIS User.
- If the person is not an active IRIS user, the IRIS system will search up the hierarchy of funds centers until it finds a funds center with an active IRIS user listed as the department head. See Step **12** of this document for more information on determining the department head approver.

Procedure

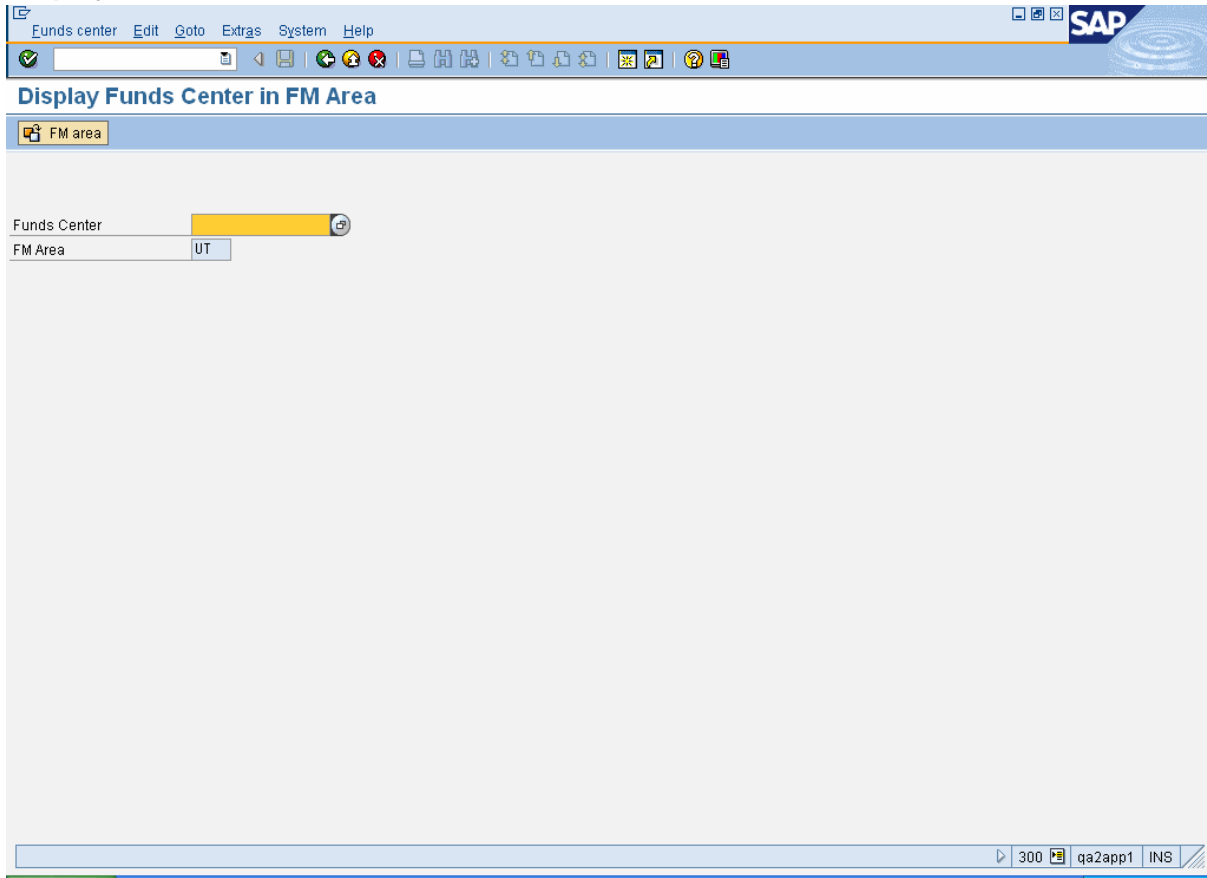
1. Start the transaction using the menu path or transaction code.

SAP Easy Access



2. Double-click  FMSC - Display to go to the *Display Funds Center in FM Area* screen.


Display Funds Center in FM Area




3. As required, complete/review the following fields:


Field Name	R/O/C	Description
Funds Center	R	Organizational unit above fund, arranged in a hierarchical structure of department, college, vice chancellor, budget entity, and university levels. A funds center is an organizational division that is responsible for preparing and monitoring budgets for one or more funds. Example: U013410028

4. Perform one of the following:

If you	Then	Go To
Know the funds center	Enter the funds center in the <i>Funds Center</i> field.	Step 10
Do not know the funds center	Use the  (Matchcode) to find the funds center by specifying a fund.	Step 5

5. If you do not know the funds center, you may find it by specifying a fund. Click  (**Matchcode**) for the *Funds Center* field. The *Funds Center* search popup window will appear as shown below.


Funds Center (1)

6. Click  and then choose the appropriate selection:

To search using a	Then	Go To
Cost center	Click on Cost Center/Fund	Step 7
WBS element	Click on WBS element/Fund	Step 7


7. On either the **Cost Center/Fund** tab or the **WBS element/Fund** tab, complete the following field:

Field Name	R/O/C	Description
Fund	R	<p>A separately budgetable source of money. Can be either a cost center or a WBS element.</p> <p>On the Cost Center/Fund tab, enter a cost center.</p> <p>Example: E011028</p> <p>On the WBS element/Fund tab, enter a WBS element.</p> <p>Example: R011048021</p>

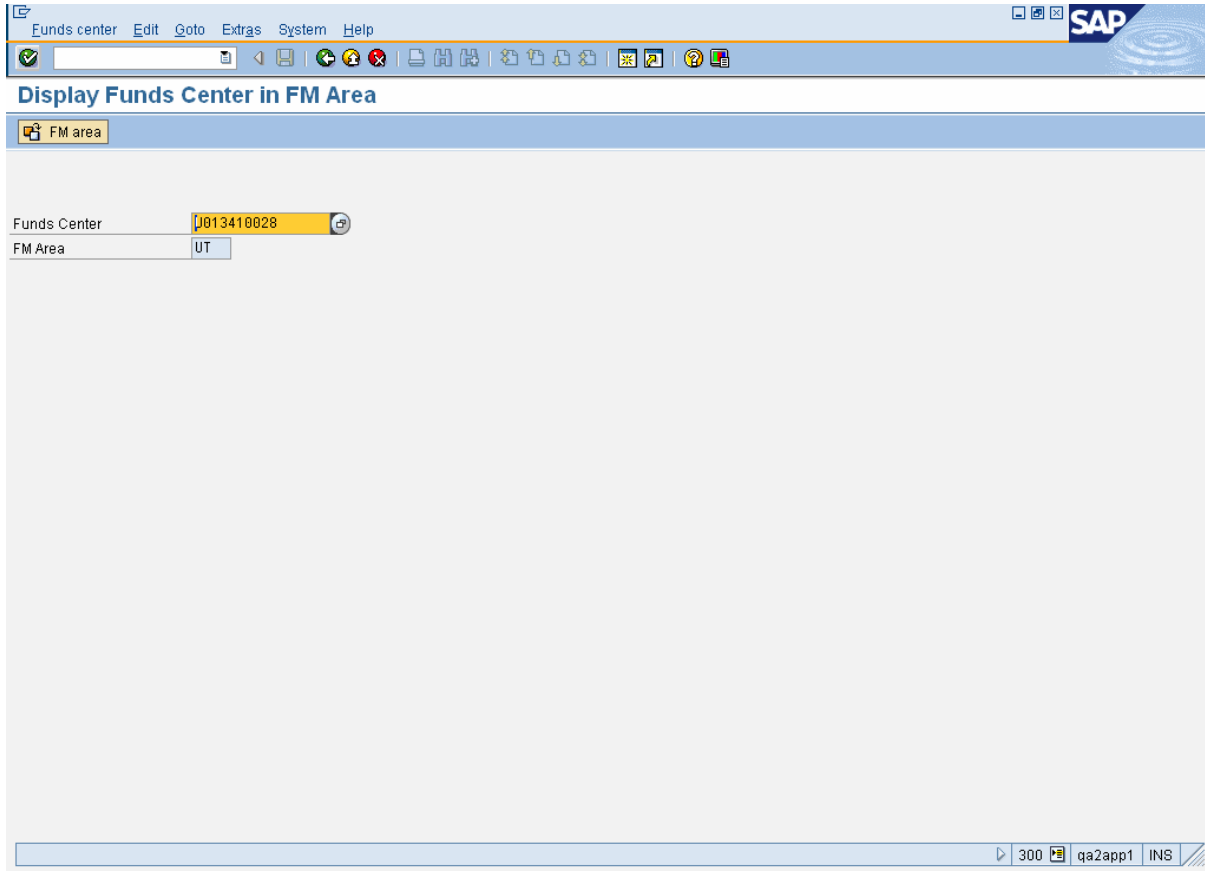
8. Click  (**Start Search**). The results of the search in this example appear as shown below.
- A cost center (E011028) was entered in the *Fund* field on the **Cost Center/Fund** tab.
 - The specified cost center appears along with its basic information.
 - The funds center is shown in the *Funds Ctr* column and begins with the letter “U”.


Funds Center (1) 1 Entry found

Cost Ctr	Name	Fund	Funds Ctr	Name
E011028	CLASSICS	E011028	U013410028	Classics

9. Click  (**Copy**). The *Funds Center* field on the *Display Funds Center in FM Area* screen will be populated with the funds center value assigned to the fund you specified, as shown below.

Display Funds Center in FM Area



10. After the funds center has been entered in the *Funds Center* field, click  (**Enter**). The *Funds Center Display* screen will appear as shown below.



The *Basic data* tab showing the attributes of the funds center is the active tab on the *Funds Center Display* screen by default.

Funds Center Display

The screenshot shows the SAP Funds Center Display interface. At the top, there is a menu bar with options: Funds center, Edit, Goto, Extras, Environment, System, Help. Below the menu bar is a toolbar with various icons. The main content area is titled "Funds Center Display" and contains several tabs: Period, Long text, Classification, Drilldown, and Change documents. The data fields are as follows:

FM Area:	UT	University of Tennessee	
Funds Center	U013410028		
Analysis Time Frame from	01/01/1900	Analysis Time Frame to	12/31/9999

The "Basic data" tab is selected, showing the following fields:

Names			
Name	Classics		
Description	Classics		
Basic data			
Valid From	01/01/1900	Valid Until	12/31/9999
Authorization group			
Fund Default Value			
Person responsible			
User name	SUZYQ		
Name	Q, Suzy		
Time dependency			
Expiration Date			
Department Head			

At the bottom right of the screen, there is a status bar showing: 300, qa2app1, INS.

11. The department head information is located on the *Basic data* tab, but you must scroll down to see it.

Click  to scroll down to the *Department Head* section of the screen.

The *Department Head* shown on the screen below is Suzy Q.

Funds Center Display

The screenshot shows the SAP Funds Center Display interface. At the top, the menu bar includes 'Funds center', 'Edit', 'Goto', 'Extras', 'Environment', 'System', and 'Help'. The SAP logo is visible in the top right corner. Below the menu bar, there are several icons for navigation and actions. The main content area is titled 'Funds Center Display' and contains the following information:

FM Area	UT	University of Tennessee
Funds Center	U013410028	
Analysis Time Frame from	01/01/1900	Analysis Time Frame to 12/31/9999

Below this information, there are tabs for 'Basic data', 'Hierarchy', 'Address', and 'Communication'. The 'Basic data' tab is active, showing the following details:

Name	Classics		
Description	Classics		
Valid From	01/01/1900	Valid Until	12/31/9999
Authorization group			
Fund Default Value			
User name	SUZYQ		
Name	Q, Suzy		
Expiration Date			
Personnel Number	112555	Q, Suzy	

At the bottom right of the screen, there is a status bar showing '300', 'qa2app1', and 'INS'.



Note that Suzy Q is also listed as the *Person responsible*. However, the entries in the *Department Head* and *Person responsible* fields do not always match.




Only the *Department Head* information is used for department head approvals.

12. In this example, Suzy Q is listed as the department head.

- If the person listed as the department head is an active IRIS User, that person will receive department head workflow items.
- If the person is not an active IRIS user, the IRIS system will search up the hierarchy of funds centers until it finds a funds center with an active IRIS user listed as the department head. See the table below for further clarification.

Funds Center	Funds Center Level	If the department head listed for this funds center level is not an active IRIS user
U013410028	Department level	Go to the college level
U013410	College level	Go to the Vice-chancellor level
U0134	Vice-chancellor level	Go to the Campus level
U01	Campus level	This level will always have the Campus Business Officer listed as the department head.

13. Click  **(Back)** to return to the *Display Funds Center in FM Area selection screen*.

14. Click  **(Back)** to return to the *SAP Easy Access screen*.

15. You have completed this transaction.

Result

You have identified the department head of a funds center by displaying the basic data for the funds center.

Comments



For assistance, please contact the IRIS Helpdesk at irishelpdesk@tennessee.edu.