How to Try on the Hogwarts Structure for Your Area

1. Run the MSTR Report "Org" under Administrative > Shared Reports > Chart of Accounts, Choosing the "Active Orgs" parameter. If needed due to broader access, filter on your highest level of responsibility. For example: L3 Div

2. Export the report (use Excel with Plain Text to get something you can sort and filter easily)

3. On the Hogwarts structure spreadsheet, fill out your L2 Executive (Executive Administration/Provost/Finance and Admin), L3 (Division/College), and L4 (Administrative Division/School). See tab "Sample" for examples. For administrative offices, your L4 will likely be the same as your L3.

4. Now look at your MSTR Org report. Find your main Academic Programs and Administration/Student Services areas and plug them into your L5 column. Less is more here. If you have multiple Administrative orgs, try to group them into Administration and Student Support for L5. Your Academic programs should be similar to what you have in Departments for your academic structure.
   For Administrative departments, look at your org charts for what is one level below your L3/L4 executive/director.

5. On your MSTR Org report, find the following L6 orgs:
   a. IND
   b. Pool/Startup
   c. Grants/Research

   These will be handled with funds, so they do not need their own Organization. Remember, we will be reporting using a combination of FOAPAL elements to be able to see all your research or all your IND. You will not need to group these in one place. The funds should be housed in the department org they belong to.

6. For Centers and Institutes, determine their level of reporting (do they report to the Dean? Or to a department head?) and place them in that level of the structure. On the Sample tab, the Center for Witchcraft Advancement reports to the Dean, so is at an L4 level. The Center for the Improvement of Magical Education is a Department Center in the Department of Magical Education Administration, so it is at L6.

7. Now place your remaining L6 orgs into the structure where needed. For each one, consider how they are used. If they are in direct support of the mission of the L5 grouping, they probably will stay. If they are being used to group like items together, such as a type of expense or a type of funding, consider what other FOAPAL elements or other attributes of the transactions could be used to do the same grouping.

8. Now that you have placed your organizations, use the Fund Columns to mark what types of funds this org will have. It may be just E&G, or could be a mix of E&G, IND/Pool, Grants, etc. (Note that E&G Self-Supporting should be its own org, either at 6A or 6B). Make sure all of your previous IND/Pool/Grants orgs now have a home as a fund within an L6 org.

9. Take note of questions/issues. What didn't find a home? What orgs do you have questions about? Is anything looking redundant?

10. How would your business processes work in this new format? Who would approve things at each level? What information would you need from other attributes of the transactions to group your data?

11. Think about the future. What if you got a new program? Or a new research center? What if your administrative department reorganized? Can you figure out where those things would fit in the structure?

12. MOST IMPORTANT: Give us your feedback! Let us know what worked and what didn't. What questions do you have? Do you have a suggestion to make the structure work better?

THANK YOU FOR YOUR HELP MAKING THE COA WORK FOR EVERYONE!