








Chart of Accounts Redesign

The Journey Continues...





-  What have we done, where have we been?
-  Where we are going
-  Crosswalk tools and output
-  Sneak peek, unlocking the potential and possibilities
-  Q&A





Where we have been

Where we are going



Where we have been...



August 2021	Established Development Environment Transitioned to Project Phase 2 Townhall 3 Finalized Structure Principles Validate and Prioritize Inventory of Integrations, Reports, and Custom Code
September 2021	Development of prioritized items begins Townhall 4 – information session and Q&A Increased Programmer resources Unit Crosswalk worksheets completed HR/Payroll Back to Basics Seminar/Discussion Engaged UBC to help with business process change
October 2021	Initial crosswalk completed for upload on October 5 (<i>core team</i>) Security Recommendations Completed First Mock Conversion – October 18-22



Don't Let "Perfect" Be the Enemy of "Good"

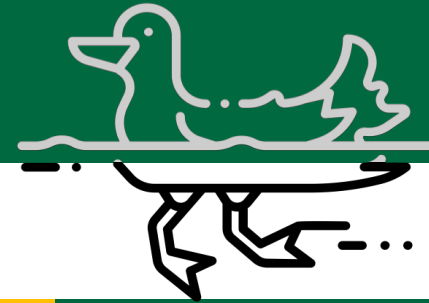


Where we are going...



October 2021	First Mock Conversion completed – October 18-22 Development and remediation of custom code begins
November 2021	Chart Elements Principles Finalized – Design, Definitions, etc. Initial Survey for Business Processes Due – November 15th Final submission of chart structure from Business Units – end of November
December 2021	Crosswalk Loaded - December 10 (<i>core team</i>) Business Process analysis underway Code development / remediation complete – December 17
January 2022	Second Mock Conversion - January 10 User Acceptance Testing – University-wide unit involvement
Spring 2022	Third Mock Conversion - March 14 COA Boot Camp – A day of seminars and workshops - April Update Training Sessions and Material
July 2022	GO LIVE!





Crosswalk

Tools and output



Crosswalk Inputs



New Chart Hierarchy

10 / PROVOST	101 / College of Humanities & Social Sciences	1036 / CHSS Academic Admin	1036A / CHSS Dean's Office Admin		
			TBD / CHSS Finance & HR	Needs new Org L5 created fo	
			1036C / CHSS Graduate Affairs		
			1036D / CHSS Outreach & IT		
			1036F / CHSS Research Development		
			1036G / CHSS Undergraduate Affairs		
			1036H / CHSS Development		
			TBD / CHSS Faculty Affairs	Needs new Org L5 created fo	
			TBD / CHSS Academic Departments	1012A / Communication Department	Needs a new Org L4 created }
			1013A / Economics Department		
			1014A / English Department		
			1016A / Modern & Classical Languages Dept		
			1018A / History & Art History Dept		
			1021A / Philosophy Department		
			1022A / Psychology Department		
			1024A / Sociology & Anthropology Dept		
			1026A / School of Integrative Studies Prgm		
			1027A / Higher Education Program		
			1030A / Religious Studies Department		
	1023B / Criminology, Law & Society Dept				
TBD / CHSS Interdisciplinary Programs	1028A / African & American Studies Program	Needs a new Org L4 created }			
	1028B / Cultural Studies Program	Academic chart mapping un			



Crosswalk Inputs



Organization Crosswalk

LS	LS DFSC	Orgn Default Fund ID	Orgn Default Fund Name	Orgn Predecessor ID	Orgn Predecessor Name	Orgn Default Program Name	Default Program	Default Location (ID)	Orgn Default Location
1012C	Communication/Indirect C								
1012D	Communication Pool Accou								
1012D	Communication Pool Accou								
1012D	Communication Pool Accou								
1011A	Economics Department	10111	University E&G	1011A	Economics Department	Instruction for Credit	10500	Fairfax Campus	FX
1011A	Economics Department	10111	University E&G	1011A	Economics Department	E&G Research/Not Sponsored	10502	Fairfax Campus	FX

1018B	History & Art History	1018A	History & Art Hist Depart	Converted to New Fund Name	Current Orgn is no longer required and all transactions will be captured in an existing Fund beginning FY21 (7/1/2021). Complete the beige New Chart Fund Table Fields.
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	Pool/History	101801	History Instruction	Pool	Departmental Research/Not Sponsored	10500
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Crosswalk Process



L4

ID	New-Coas	New-Orgn	New-Orgn Title	New-PRED C	ACAD Attrib	Click to Add
1 P	FA1A	SVP Finance and Administration	FA1			
2 P	FA2A	VP HR and Payroll Admin	FA2			
3 P	FA2B	HR Strategy and Talent Management	FA2			
4 P	SC1A	College of Science Academic Admin	SC1			
5 P	SC1D	College of Science Academic Depts	SC1			
6 P	SC1R	College of Science Centers and Inst	SC1			
7 P	FA3A	Information Technology Services	FA3			
8 P	FA1B	SciTech Campus Executive Office	FA1			
9 P	PP1A	SSPG Academic Administration	PP1			
10 P	PP1D	SSPG Academic Departments	PP1			
11 P	PP1R	SSPG Centers and Institutes	PP1			
12 P	LA1A	CHSS Academic Administration	LA1			
13 P	LA1D	CHSS Academic Departments	LA1			
14 P	LA1M	CHSS Interdisciplinary Programs	LA1			
15 P	LA1R	CHSS Chartered Research Centers	LA1			

L5

ID	New-Coas	New-Orgn	New-Orgn Title	New-PRED C	ACAD Attrib	Click to Add
35 P	LA1AA	CHSS Dean's Office Admin	LA1A			
36 P	LA1AB	CHSS Finance & HR	LA1A			
37 P	LA1AC	CHSS Graduate Affairs	LA1A			
38 P	LA1AD	CHSS Outreach & IT	LA1A			
39 P	LA1AE	CHSS Research Development	LA1A			
40 P	LA1AF	CHSS Undergraduate Affairs	LA1A			
41 P	LA1AG	CHSS Development	LA1A			
42 P	LA1AH	CHSS Faculty Affairs	LA1A			
43 P	LA1DA	Communication Department	LA1D	COMM		
44 P	LA1DB	Economics Department	LA1D	ECON		
45 P	LA1DC	English Department	LA1D	ENGL		
46 P	LA1DD	Modern & Classical Languages Dept	LA1D	MCL		
47 P	LA1DE	History & Art History Dept	LA1D	HIST		
48 P	LA1DF	Philosophy Department	LA1D	PHIL		
49 P	LA1DG	Psychology Department	LA1D			
50 P	LA1DH	Sociology & Anthropology Dept	LA1D	SOAN		
51 P	LA1DI	School of Integrative Studies Prgm	LA1D	SINT		
52 P	LA1DJ	Higher Education Program	LA1D	HE		
53 P	LA1DK	Religious Studies Department	LA1D	RELI		
54 P	LA1DL	Criminology, Law & Society Dept	LA1D	CRIM		
55 P	LA1MA	African & American Studies Program	LA1M	AFAM		
56 P	LA1MB	Cultural Studies Program	LA1M	CULT		
57 P	LA1MC	Russian Studies Program	LA1M			
58 P	LA1MD	Interdisciplinary Studies (MAIS)	LA1M	MAIS		
59 P	LA1ME	Global Affairs	LA1M	GLOA		
60 P	LA1MF	Women & Gender Studies Program	LA1M	WMST		
61 P	LA1RA	Ali Vural Ak Ctr Global Islamic St	LA1R			
62 P	LA1RB	Institute for Immigration Research	LA1R			



Crosswalk Process



ID	L2	L2 DESC	L3	L3 DESC	L4	L4 DESC	L5	L5 DESC	L6A	L6A DESC	L6B	L6B DESC	Default Fun	Default Fun	Defa
2133 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103401	Technology Ac				10111 University E&G	10101	
2134 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103404	CHSS Start-up				10111 University E&G	10101	
2135 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103408	CHSS Contract				10211 E&G Self-suppl	10101	
2136 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103435	State Funded				Higher Ed Rese	20501	
2137 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103447	Grad Common				243289 Grad Common	80101	
2138 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103453	Grad Common				243276 Grad Common	80101	
2139 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	103454	CHSS Faculty				10111 University E&G	10101	
2140 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034A	CHSS Dean's Ar	130423	Grad Common				243272 Grad Common	80101	
2141 10	Provost Acad	1001	College Hum	1034	CHSS Dean's Ar	1034B	EPE/CHSS Dear	160334	EPE/CHSS DE				10211 E&G Self-suppl	10104	
2144 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103601	CHSS Dean's Of				10111 University E&G	40701	
2145 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103602	CHSS Grants &						
2146 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103603	Inst. for Immig						
2147 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103611	Pool/CHSS				16276 Pool/CHSS	10501	
2148 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103612	Pool/CHSS/Ins				16277 Pool/CHSS/Ins	10501	
2149 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103613	Pool/CHSS/Psy				16278 Pool/CHSS/Psy	10501	
2150 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103619	CHSS Dean's Of				17257 CHSS Dean's Of	30101	
2151 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103625	IND/CHSS/Res				15111 Indirect Cost R	10501	
2152 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103626	CHSS Finance				10111 University E&G	40701	
2153 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103627	CHSS Dean's Of				17329 CHSS Dean's Of	30101	
2154 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103628	CHSS Course				10211 E&G Self-suppl	10101	
2155 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103629	CHSS Recruitm				10111 University E&G	40701	
2156 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103673	CHSS Fac Affair				10111 University E&G	40701	
2157 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103674	CHSS Furniture				10111 University E&G	40701	
2158 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	103675	CHSS FRDA Car				10111 University E&G	40701	
2159 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	1036A8	IND/CHSS						
2160 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036A	CHSS Academi	1036A8	IND/CHSS	103672	IND/CAN/CHSS		15111 Indirect Cost R	10501	
2161 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036C	CHSS Associate	103631	CHSS Graduate				10111 University E&G	40701	
2162 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036C	CHSS Associate	103633	CHSS Graduate				10111 University E&G	50101	
2163 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036D	CHSS Associate	103642	CHSS Info Tech				10111 University E&G	40701	
2164 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036E	CHSS Associate	103651	CHSS Outreach				10111 University E&G	60101	
2165 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036F	CHSS Associate	103656	CHSS Research				10111 University E&G	40701	
2166 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	101202	Forensics Team				30970 CHSS AE Facult	90101	
2167 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	101207	Forensics Awar				30511 University Life	90101	
2168 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	102801	Arlington Sem				10111 University E&G	10101	
2169 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	102875	Summer Camp				17291 Summer Camp	30101	
2170 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	103635	Interdisciplina				10111 University E&G	10101	
2171 10	Provost Acad	1001	College Hum	1036	CHSS Acad Adn	1036G	CHSS Assc Dear	103635	CHSS Interdisci				10111 University E&G	40701	

1. (Check) Orgn Transform Query
2. (Check) Orgn Transform to NewOrgn Query
3. (Check) Orgn Transform to Fund Query
4. Orgn Transform for Combine (moves the "combine" orgs to a separate table for later crosswalking) - only do this once per Orgn Worksheet Load table
5. Update NewOrgn to L6 Orgn Numbers
6. Run Numbering Module to assign L6 Orgn Numbers to L6 Orgn Numbers table (assigns numbers to new orgs from transform table)
7. Load Orgn Transform to Organization XWalk
8. Load Orgn Transform to Fund
9. Load 6B Orgn Transform to Organization XWalk
10. Load 6B Orgn Transform to Fund
11. Load Orgn Numbers L6 to Organization XWalk (load orgn numbers from L6 Orgn Numbers table to XWalk for new orgn)
12. Load Orgn Predecessors to Organization XWalk (loads L5 predecessors)
13. Load Orgn Predecessors L6 to Organization XWalk (loads L6 predecessors using the L6 Orgn Load to Banner query)
14. Load Orgn Numbers L6 to Organization XWalk Fund Default
15. Load Program code to Organization XWalk
16. Load Location code to Organization XWalk
17. copy any "new orgns" (blank rows in Old) to New Orgn TBD



Crosswalk Output



New-Orgn	New-Orgn Title	New Fund C	New Fund D	New-PRID Orgn 4'	New-PRID Orgn Title	New-Prpg C	New-Prpg D	New-Loc Co	New-Loc De	New-DET	New-Level	Change
M13378	Communication Department	10111	University E&G LA1DA		Communication Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13378	Communication Department	10111	10111 LA1DA		Communication Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13378	Communication Department	10111	10111 LA1DA		Communication Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M19534	Economics Instruction	10111	University E&G LA1DB		Economics Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M10088	Center for Public Choice	10111	University E&G LA1DB		Economics Department	10502	E&G Research/ FFX	Fairfax Campus			Level 6A	
M14218	Wiley DL-CHSS-online Devel EC	10111	University E&G LA1DB		Economics Department	10100	Instruction for MOL	Mason Online			Level 6A	
M15096	Grad Commonwealth CHSS Eve	243290	Grad Common LA1AB		CHSS Finance & HR	80100	Student & Facs FFX	Fairfax Campus			Level 6A	
M17766	Grad Commonwealth CHSS Odc	243288	Grad Common LA1AB		CHSS Finance & HR	80100	Student & Facs FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	University E&G LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M10888	Watershed Lit Center	10111	University E&G LA1DC		English Department	10502	E&G Research/ FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M11604	CHSS Reserve	10111	10111 LA1AB		CHSS Finance & HR	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13462	English Instruction	10111	10111 LA1DC		English Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M12530	Modern/Classical Languages In	10111	University E&G LA1DD		Modern & Classical Languages Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M12530	Modern/Classical Languages In	10111	10111 LA1DD		Modern & Classical Languages Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M12291	History Instruction	10111	10111 LA1DE		History & Art History Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M12291	History Instruction	10111	University E&G LA1DE		History & Art History Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M15042	Center for History and New Mec	10111	University E&G LA1DE		History & Art History Dept	10502	E&G Research/ FFX	Fairfax Campus			Level 6A	
M12291	History Instruction	10111	10111 LA1DE		History & Art History Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M13774	Global Islamic Studies Center	10111	University E&G LA1RA		All Vural Ak Ctr Global Islamic St	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M18820	Philosophy Instruction	10111	University E&G LA1DF		Philosophy Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M15328	Religious Studies Instruction	10111	University E&G LA1DK		Religious Studies Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M12172	SPP Center	10111	University E&G LA1DF		Philosophy Department	10502	E&G Research/ FFX	Fairfax Campus			Level 6A	
M16805	Psychology Instruction	10111	University E&G LA1DG		Psychology Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M16805	Psychology Instruction	10111	10111 LA1DG		Psychology Department	10100	Instruction for FFX	Fairfax Campus			Level 6A	
M17225	Criminology, Law & Society Deg	10111	University E&G LA1DK		Criminology, Law & Society Dept	10100	Instruction for FFX	Fairfax Campus			Level 6A	

Comments	CVT New Fu	CVT New Fund Nan	CVT New Fu	CVT New Fund Default Orgn	CVT New Fund Defa	CVT New Fu	New Fund L3	Click to
		Pool/History	M12291	History Instruction	Departmental Research	Fairfax Campus	Pool	



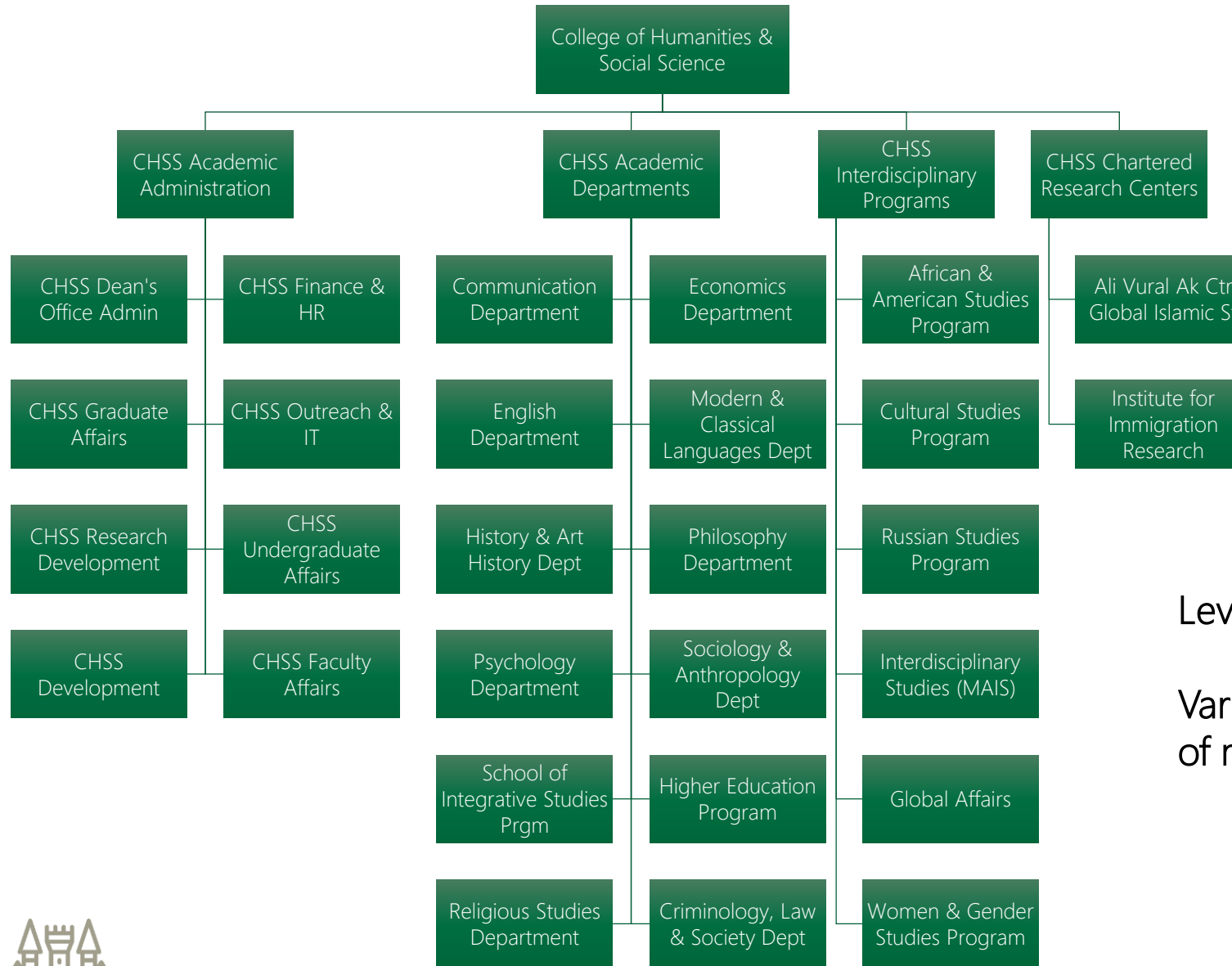


Academic Unit Structure

Level 3 - College

Level 4 - Division

Level 5 - Depts



Level 6(s) below each

Various Funds (colors of money) tied to L6



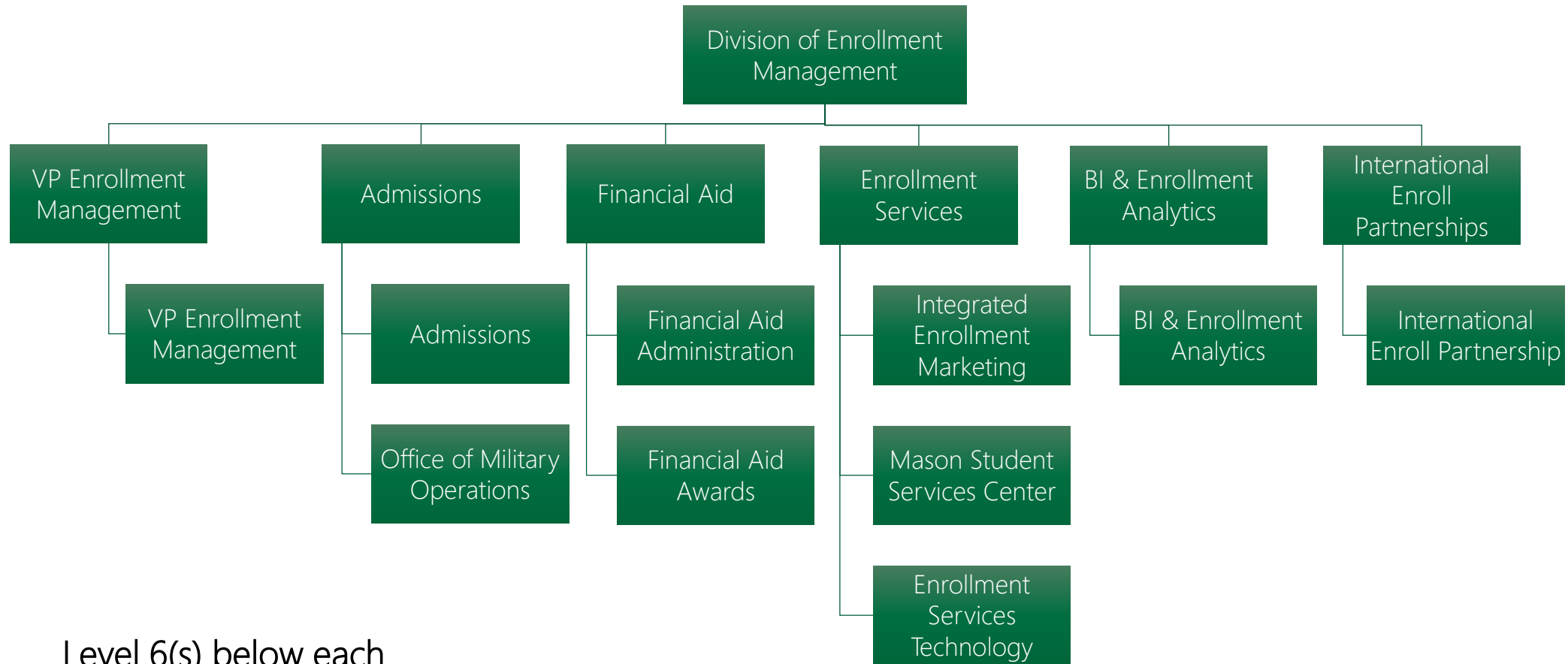
Administrative Unit Structure



Level 3 – Major Division

Level 4 – Sub-divisions

Level 5 - Depts



Level 6(s) below each

Various Funds (colors of money) tied to L6





Unlocking the potential

... the possibilities



Next Steps



- 🔑 Townhall 6 – November 18, 10:30 – 11:30AM
- 🔑 Townhall 7 – December 7, 2:30 – 3:30PM
- 🔑 Townhall 8 – January
- 🔑 Townhall 9 - February
- 🔑 Spring All-Day COA Boot Camp








Q&A





If you need any assistance, or have any questions, the core project team is prepared to help:

-  Contact the Project Team: coaproj@gmu.edu
-  Project updates and info: <https://coa.gmu.edu/>
-  Join the conversation: [Chart of Accounts Redesign Community \(MS Team\)](#)

