

# Organization



## PURPOSE

The purpose of this document is to communicate the requirements that must be considered when determining new values, mapping strategies or conversion strategies for Chart of Accounts (COA) ChartFields.

## Organization

<b>Field Definition</b>	Organization is used to meet an agency's unique financial information/reporting needs. Organization represents a group of people doing the same kind of work and working for the same manager, or the approved organization chart for an agency.
<b>Field Length</b>	7 digits
<b>Data Type</b>	Numeric
<b>Format</b>	All values must contain seven digits. Numbering convention is dictated by the agency ensuring that they adhere to rules established by the Enterprise. Agencies must be consistent in establishing values and should utilize numeric ranges to ease cross-organization queries and lookups and decrease the subsequent maintenance of trees.
<b>Uniqueness</b>	Organization is a Business Unit-specific ChartField that will be controlled at the agency level. There will be no statewide standards and no viable statewide query capability on the Organization chartfield across agencies.
<b>Creation Process</b>	Agencies will be responsible for establishing their Organization values. Values will be added to Aspire by Enterprise staff.
<b>Numbering Convention</b>	<ul style="list-style-type: none"><li>• Organization should contain no built-in logic within the value. The chartfield may incorporate recognizability, i.e. Division within an agency. Agencies should not simply drag current FLAIR values into their Aspire values.</li><li>• Organization is an agency specific chartfield and as a result no numbering conventions will be established across agencies. Instead agencies will need to develop their numbering conventions using consistent formatting in order to facilitate subsequent sorting and reporting of the data.</li><li>• Agencies should use limited smart coding and allow for ranges to provide functional hierarchy.</li></ul>

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<b>Other Information</b>	<ul style="list-style-type: none"><li>• The Organization chartfield is used when defining ‘row-level’ security for an agency at a Tree Node level. Security is granted based on a node level of the tree and grants access to charge transactions to organization value(s) associated with that node.</li><li>• Each agency will define 3 trees using the Organization chartfield: (1) Aspire ‘row-level’ security organization, (2) reporting and (3) management budget.</li><li>• A manager’s name may be associated with an Organization value.</li><li>• Every Organization must have a long description (30 characters) and a short description (10 characters). Descriptions must be mixed case with the first character of each word being a capital letter. Descriptions should contain only letters, numbers and spaces; no special characters.</li></ul>
<b>Combination Edits</b>	No combination edits are anticipated for the Organization chartField.
<b>Assumptions</b>	<ul style="list-style-type: none"><li>• Agencies will be required to submit a document to the Chief Financial Officer (CFO) specifying how the field will be used and specifically how and if the Organization is being used for something other than as described in the definition.</li><li>• Trees will be used to achieve hierarchal rollups of detailed Organizations for security, reporting and management budgets.</li><li>• All Organization values should be established for the lowest level within the agency to which budget and financial entries are posted.</li></ul>
<b>Mapping</b>	<ul style="list-style-type: none"><li>• FLAIR allowed agencies to incorporate various things like locations, grants, funding streams, and many other bits of information into their Organization value. Agencies must consider these embedded FLAIR codes when developing their mapping rules.</li><li>• Agencies will define their specific data mapping rules to conform to sound data mapping techniques and theories as well as Enterprise defined chartfield requirements.</li></ul>

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### **Data Mapping Tool Requirements**

- The tool developed will need to allow agencies to establish new Organization chartfield values and ensure those values are validated for length.
- Once the new values are established the agencies will need to map all current FLAIR Organization values to a new Aspire chartfield value.
- The tool will be used to validate various mapping rules. Agency specific mapping rules must be validated against the data submitted. In addition various queries will be executed to check for mapping integrity issues. Integrity issues will include validating that 1 FLAIR Organization value is not mapped to more than 1 Aspire Organization value.