

INSTRUCTIONS TO CREATE REGENTS' PROFESSOR ACCOUNT

Creating Regents' Account

- Go to UAccess Financials
- Search "Account" and click "Create Account" on the top right corner

UAccess | Financials

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account	ACCOUNTING	Sub-Account	×
	Current Account Balance	Account Type	
Activities Reference Administration	Shipping Account	Accounting Period	ount Number
ACCOUNTING	ACCOUNTS RECEIVABLE	Basic Accounting Category	
ΔCCOLINTS RECEIVARI E	Organization Accounting Default	Offset Account	ganization Cod
ACCOUNTRACEIVADEE	CHART OF ACCOUNTS	ProRate Journal Entry Account Line	
CAPITAL ASSETS	Account	ProRate Journal Entry Base Account	
CHART OF ACCOUNTS	Account Delegate	CONTRACTS & GRANTS	ports To Organ
CONTRACTS & GRANTS	Account Delegate Global	Indirect Cost Recovery Exclusion By Account	
Contracts Contracts	Account Delegate Global from Model	LABOR	ount Type Co
EFFORT CERTIFICATION	Account Delegate Model	Account Status (Base Funds)	
LABOR	Account Global	Account Status (Current Funds)	
ORDERS			-Fund Group
ORDERS			

• <u>Complete the account attributes with the following guidelines:</u>

Account Number	210XXXX
Account Name	LAST NAME of the Regents' Professor – REGENTS
Account Type Code	OX - ORGANIZATIONAL OPERATIONS
Sub-Fund Group Code	IDCREG - IDC-Regents Fund (N3)
Higher Education Function Code	IPR - Individual or Project Research
Source Funds Code	710
Account Restricted State Code	N - NOT APPLICABLE
Budget Record Level Code	N *-* No Budget
Account Sufficient Fund Code	N - No Checking
Account Expense Guideline Text	Conform to university policy
Account Income Guideline Text	Conform to university policy
Account Purpose Text	Regents' Professor Faculty Name
Tax Region Code	NOSALESTAX

• Click "Submit"



SHORTCUT

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LABOR	Account Global	Account Status (Current Funds)	5 10
ORDERS			-Fund Group

• Type *regents* in the "Account Name"

Action List
nber:
Code:
04
rganization Code:

• Click "Copy"



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Action List Q Doc Search I Nina

Search Results														
Actions	Chart Code	Account Number	Account Name	Organization Code	Responsibility Center Code	Reports To Organization Code	Account Type Code	Fund Group Code	Sub-Fund Group Code	Fiscal Officer Name	Account Manager Name	Account Supervisor Name	Closed?	Account Create Date
edit copy	<u>UA</u>	2101808	BREIGER - REGENTS	<u>0418</u>	NO	<u>SBSC</u>	<u>OX</u>	DI	IDCREG	Miguel A Larios	Francisco Pedroza	Ronald L Breiger	No	06/07/2016
edit copy	<u>UA</u>	2104772	MALHOTRA - REGENTS	<u>0413</u>	NO	<u>SCNC</u>	<u>OX</u>	DI	IDCREG	Lynn A Lane	Timothy D Swindle	Renu Malhotra	No	06/08/2016
edit copy	<u>UA</u>	2106711	GOHLKE - REGENTS	<u>3504</u>	NO	<u>ENRT</u>	<u>OX</u>	DI	IDCREG	Michelle Stone-Eklund	Sharon K Young	Colin Greene Blakely	No	06/07/2016
edit copy	<u>UA</u>	2107300	BEVER - REGENTS	0431	NO	<u>SBSC</u>	<u>OX</u>	DI	IDCREG	Kimberley K Young	Francisco Pedroza	Thomas G Bever	No	07/29/2011
edit copy	<u>UA</u>	<u>2107351</u>	LIVERMAN - REGENTS	3008	NO	SBSC	OX	DI	IDCREG	Adriana T Kelly	Francisco Pedroza	Lynn Ann Staeheli	No	10/24/2016

• <u>Change the account attributes accordingly. Account number and name should follow these guidelines:</u>

Account Number Account Name 210XXXX LAST NAME of the Regents' Professor – REGENTS

• Click "Submit"