

How to Make an Index

What do you need the index for?

If you want to keep track of an individual's money, is it a large amount over several years, or just a small amount that will expend in less than a year?

If is a large amount of money, or a project that will go for several years, then you

should set up an index for it.

You want to move over restricted funds and need a restricted fund to accept it

You need to receive funds from another unit and you don't have a place with the same fund number

At this time BRP does not require the use of indices, but they are recommended.

So what makes up an index?

An index is a unique collection of letters and numbers that are used to tell Banner FIS what fund, org, program and activity code you want to use for an entry.

Activity codes are optional, but it is best to always use one.

To create an index, you need to be able to tell the BRP office what fund you want to use, what organization code you want, what program code you want, and the activity code (if needed). Program codes are probably the most difficult aspect of creating an index, as they tell whether the funds will be used for research, teaching, etc.

A current list of all these codes can be found on the Budget and Resource Planning website. Go to <http://brp.uoregon.edu> and choose "Reports and Analysis" on the sidebar. Log in and then you should be given access to different reports including a current list of Program codes.

For further help with program codes, you can contact your budget analyst with questions.

Activity codes can be tied to individuals or events. If you don't have a preference, you can use BGEN, which is the College of Arts & Sciences default activity code.

When establishing indices for awards that are housed in a department, it is best to use BGEN for the definition. Although you may have a current award winner whose activity code could be used, you want the index to last beyond that individual. You can still deposit funds and expend them on the activity code, even if the index is not defined by it.

So how do I create an index?

Budget and Resource planning provides an excel worksheet with tabs to request various items. It is located on the BRP webpage , Forms tab, "Chart of Accounts Request" link. Click on the link and open the Excel file. The first tab in the Excel file is used for requesting a new index.

You will want to think of an index code name, and a title for your index. The index code should start with the letter 'B' and then the next 1-2 letters represent your department name. For instance AN is Anthropology, B is Biology, and RL is Romance Languages. If you aren't sure what your 1-2 letters are, please contact Shari in the Dean's office and she will help you sort it out.

The next letters should suggest something as to the use of the index. These are up to you, but they cannot duplicate anything you already have.

The title of the index needs to include your department acronym and suggest what it is for as well. So the index might be "BCPSRM" and the title might be COLT Sherman faculty funds for comparative literature for Sherman's faculty funds. (titles must be no more than 35 characters)

Our budget analyst at present is Tim Finch. You can email him the request for an index directly. He will review it and send your request to BAO. They will notify BRP and you when it is complete.

The form BRP provides has the following fields to enter for setting up a new index:

New Indices

Index:	
Title:	
Fund:	
Orgn:	
Prog:	
Actv:	

For help in creating indices, you can contact Shari Powell in the CAS Dean's office at 6-3283 or shari@uoregon.edu You may also talk to your budget analyst, Tim Finch, at 6- 3247 or tfinch2@uoregon.edu