Checklist For Establishing New Centers and Moving Organizations

☐ Create the Center
  ☐ Designate the Key Staff
    ☐ Senior Business Administrator  ☐ Security Administrator
    ☐ Center Reference Administrator(s)  ☐ BEN Key Contact
  ☐ Establish the Purchasing Hierarchy
  ☐ Create Center Reference codes

☐ Create and Map the Organizations
  ☐ Create Parent Organization(s)
  ☐ Create Child Organization(s)
  ☐ Flag old organization(s) for deletion
  ☐ Create or revise Legacy account number mappings for Bursar
  ☐ Create or revise vendor location for home department in purchasing

☐ Move people into the new organizations
  ☐ Create or transfer position numbers into new orgs
  ☐ Hire or transfer people into positions
  ☐ Create or revise security profiles for all staff
    ☐ BEN  ☐ Payroll  ☐ Time Reporting  ☐ Salary Management
    ☐ Pillar  ☐ SRS  ☐ SFS  ☐ Data Warehouse  ☐ Other?

☐ Move space into the new organizations

☐ Move property into the new organizations

☐ Move money into the new organizations
  ☐ Reallocate current year budget and revise future budget plans
  ☐ Review “ownership” and move balances
    ☐ Buildings  ☐ Equipment  ☐ Loans  ☐ Pledges
    ☐ Cash  ☐ Capital Projects  ☐ Other?
  ☐ Revise “Responsible Organization” and move balances
    ☐ Endowment Funds  ☐ Gift Funds  ☐ Grants
    ☐ Agency Funds  ☐ External Organizations

☐ Other Financial Administration Tasks
  ☐ Request or revise ☐ ProCards  ☐ TAC Cards  ☐ Petty Cash
  ☐ Notify travel office to revise travel profiles and locations
  ☐ Notify ISC other departments with feeder systems
  ☐ Change internal systems as needed

☐ Create or revise Directory Listings
  ☐ Green Pages  ☐ White Pages  ☐ Blue Pages  ☐ Online

☐ Order New Letterhead and Business Cards