GL.010.013 – INACTIVATING CHARTFIELDS

Purpose	• To identify where to maintain ChartField tables. • To identify why effective dating with activation and inactivation is used. • To describe how to inactivate a ChartField. • To inactivate a ChartField.
Description	After users initially populate the ChartField tables, users can maintain them from the ChartField Values page. Users can also use the PeopleTools Tree Manager to add or update ChartField values as needs change. Changes to the definition of most ChartField values are effective-dated, meaning users can create ChartField values when they want to activate a department, introduce a product or close an account. Use effective dating with activation and inactivation functionality to maintain a full history of all changes or additions, to provide a complete audit trail, and to make possible historical comparisons with past, present and future conditions.
Security Role	BOR_GL_CHARTFIELDS
Assumptions	None
Dependencies/ Constraints	None
Additional Information	None

Procedure

Below are step by step instructions on how to inactivate a department with a specific effective date.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Set Up Financials/Supply Chain** link.
4.	Click the **Common Definitions** link.
5.	Click the **Design ChartFields** link.
6.	Click the **Define Values** link.
7.	Click the **ChartField Values** link.
8.	Click the **Department** link.
9.	Enter or search via the magnifying glass icon to select the **Department** that needs to be inactivated. The system navigates to the Department page.
10.	When users no longer need to use a certain ChartField value, add a row to create an effective-dated inactive entry, instead of inactivating the original row. If users make the existing row inactive, users will have no history of its time as an active ChartField value. Click the plus **(+)** icon to add a new row.
11.	Click the **View All** link. The system navigates to the ChartField Values page.
12.	Enter an Effective Date in the **Effective Date** field.
13.	Click the **Status** dropdown link.
14.	Click the **Inactive** list item.
15.	Click the **Save** button.
16.	Run the Project Sync Process to define the budget and charge transactions. For more information the Project Sync Process, see GL.010.007 – Running Project Sync Process.
17.	Once a grant is created, the grant must be funded via budget journals or budget transfers to spend funds.
18.	Run the General Ledger Build Combination Data process. Refer to GL.030.006 – Running Build Combination Data for more information. ***Note****: The COA_COMBO1_BOR table may need to be updated if the department is used in the Banner system and/or OneUSG Connect. For more information, refer to GL.030.007 - Updating COA_COMBO1_BOR_TABLE.*