

GL.010.013 – INACTIVATING CHARTFIELDS

Purpose	• To inactivate a ChartField. • 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.
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
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 Menu 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 Define ChartField Value link.
8.	Click the Department link.
9.	Enter the Department or use the magnifying glass icon to select the Department that needs to be inactivated. Click the Search button. 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 displays all of the rows for the department.
12.	Enter an Effective Date in the Effective Date field.
13.	Click the Status dropdown arrow.
14.	Click the Inactive list item.
15.	Click the Save button.
16.	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.