GL.010.014 - INACTIVATING PROJECT/GRANT CHARTFIELDS

Purpose	• To inactivate a Project or Grant ChartField. • To describe how to inactivate a Project or Grant ChartField. • To identify what other steps may need to be taken after inactivating a Project or Grant ChartField.
Description	The Project and Grant ChartFields do not have effective dated row functionality when selecting the Active or Inactive status. Accounting users inactivate projects and grants on an as-needed basis. Before inactivating any ChartField, ensure to conform to guidelines established by the BOR Chart of Accounts Committee.
Security Role	**BOR_GL_CHARTFIELDS** and **BOR_GL_CHARTFIELDS_PRJ**
Dependencies/ Constraints	• When finished inactivating the Project or Grant ChartField, users must run the Project Sync batch process before a budget can be considered closed or transactions can no longer be charged. • Conform to guidelines established by the BOR Chart of Accounts Committee.
Additional Information	• The end date of a project will govern whether a project is valid for charging revenue and expenses. Since many projects are used to create and depreciate assets, this means an asset transfer is required before inactivating the project. If the status of a project is set to inactive, no other transactions will be allowed to post. • The project status grid does not govern the validation of transactions. This functionality is reserved for environments where project costing is installed.

Procedure

Below are step by step instructions on how to inactivate a Project or Grant ChartField.

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 **Project** link.
9.	Enter a Project number in the **Project** field.
10.	Click the **Search** button.
11.	Click the **Status** drop down arrow. The status governs whether a project value can be used in any PeopleSoft Financials submodule. If the status is inactive, the financial transaction does not pass edits. ***Note:*** *The Project ChartField does not have effective dated row functionality when selecting the Active or Inactive status; there is only one row in which to use these statuses.*
12.	Select **Inactive** from the dropdown menu.
13.	Click the **Save** button.
14.	Run the Project Sync Process to keep the project definition in sync with Commitment Control ledger definitions. For more information the Project Sync Process, see GL.010.007 – Running Project Sync Process.
15.	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.*