Maintaining Agency Controlled ChartField Values
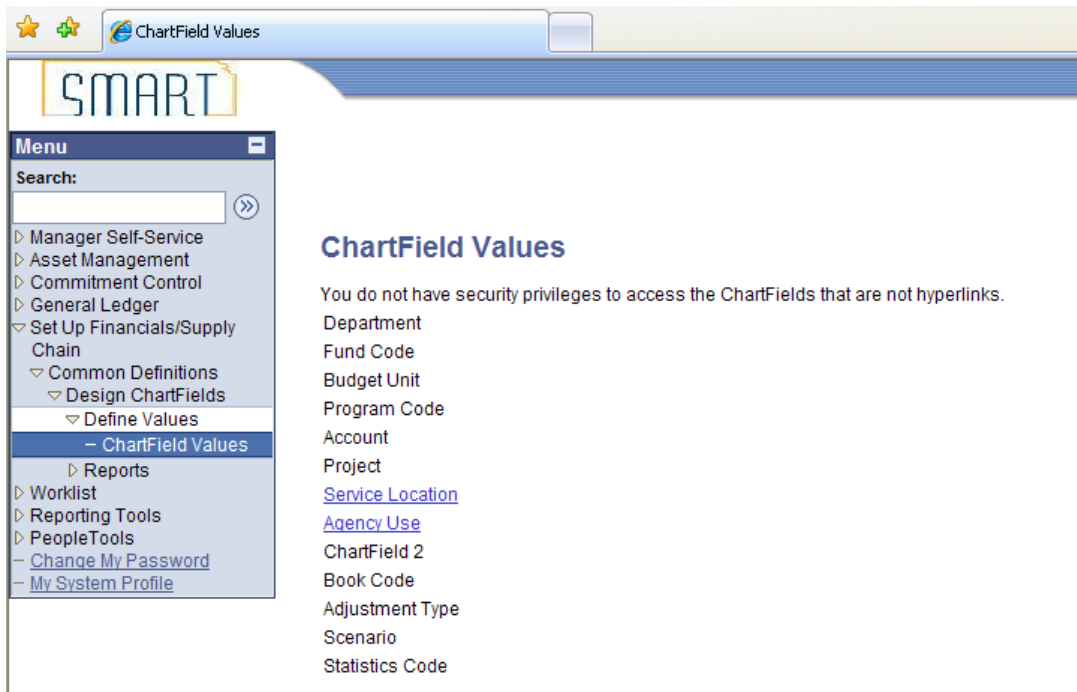
Agency Use, Service Location

Roles: Agency Chartfield Maintainer, Central GL Maintainer

Navigation: Set Up Financials/Supply Chain -> Common Definitions -> Design ChartFields -> Define Values -> ChartField Values

Adding a New Value

1. Navigate to the ChartField Values page. Click on the hyperlink for the ChartField that you need to Add.

2. Click on the Add a New Value Tab. Enter/Verify the SetID. The SetID is equal to your 3-digit agency number plus 2 – zeroes, i.e. – "XXX00" where XXX = 3-digit Agency Number. Enter the Alphanumeric value that you want to add. Agency Use – 10 Character Limit; Service Location – 5 Character Limit.
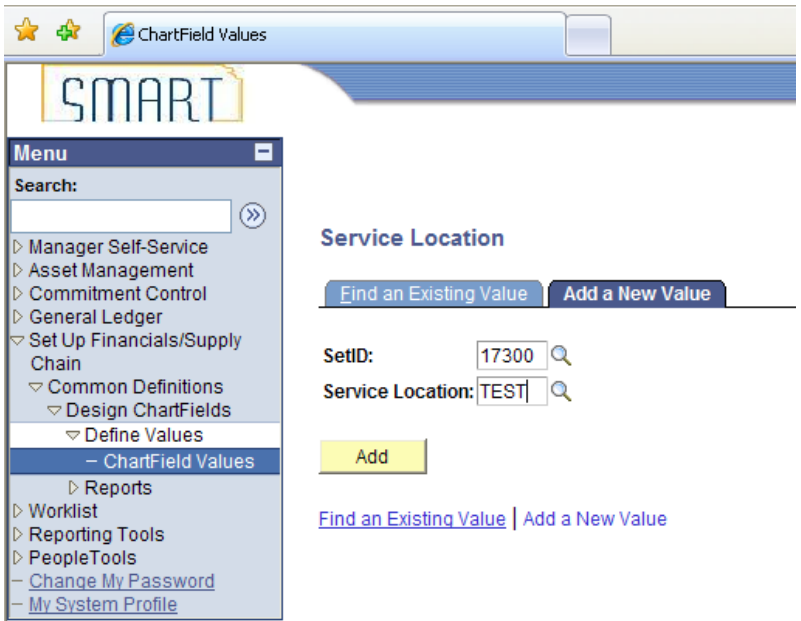
3. The Effective Date defaults to today's date. Change the Effective Date to 01/01/1901 to create what is called the "Anchor" Row. Verify that the Status is Active. Enter a Description up to 30 characters and a short description up to 10 characters.
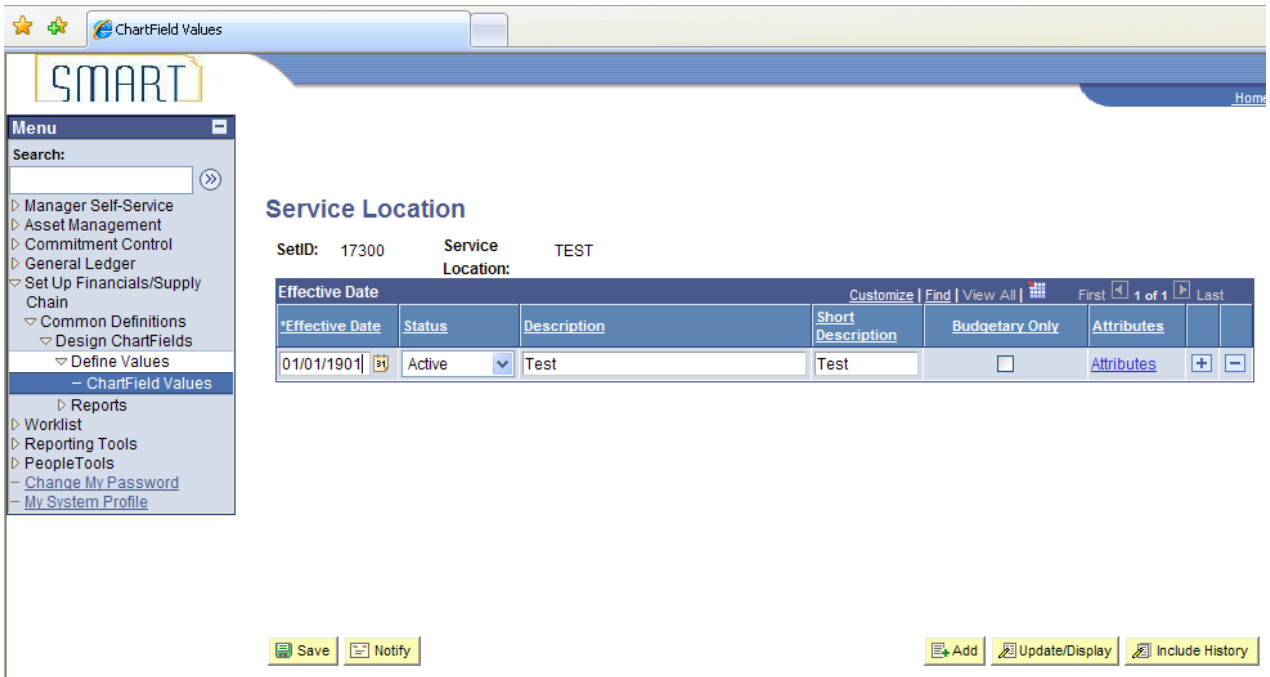
4. If you would like to capture the date that the value was entered, click the plus button (+) to add a new effective dated row with today's date. Click Save.

Inactivating/Updating Existing Value

1. Navigate to the ChartField Values page. Click on the hyperlink for the ChartField that you need to Inactivate or Update.

2. Click on the Find an Existing Value tab. Enter/Verify the SetID. The SetID is equal to your 3-digit agency number plus 2 zeroes, i.e. – "XXX00" where XXX = your 3-digit Agency Number. Enter the value that you want to Inactivate or Update, or leave it blank to retrieve a list of all values. You may also click on the magnifying glass icon (Look up button) next to the field to select the value from a list. Or, you may change the search options to search for partial value strings (begins with) or exact values (=).

Service Location

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

SetID: = 17300 🔍

Service Location: begins with 🔍

Description: begins with

Look up Service Location (Alt+5)

☐ Include History ☐ Case Sensitive

Search   Clear   Basic Search 💾 Save Search Criteria

Find an Existing Value | Add a New Value
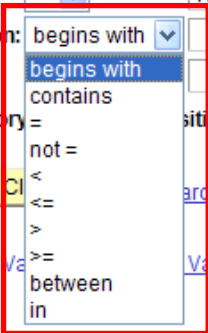
Service Location

Enter any information you have and click Search. Leave fields blank for a list of all values.

| Find an Existing Value | Add a New Value |

SetID: = 17300 🔍

Service Location: begins with 🔍

Description:

begins with
contains

☐ Include History = sitive
not =
<
Search   Cl <= arch 💾 Save Search Criteria
>
Find an Existing Va >= Value
between
in

3. Click on the Include History button at the bottom of the page to view all effective dated rows. Click the plus button (+) to add a new effective dated row with today's date or a future date. Type the new Description and/or Short Description or, select "*Inactive*" from the drop down menu of the Status field. Click Save.

Service Location

SetID: 17300   Service Location: TEST

*Effective Date	Status	Description	Short Description	Budgetary Only	Attributes		
06/28/2010	Inactive	Add a new row and update Descr	10 Char	☐	Attributes	+	−
06/15/2009	Active	Test 30 characters	10 Char	☐	Attributes	+	−
01/01/1901	Active	Test 30 characters	10 Char	☐	Attributes	+	−

Customize | Find | View All | First ◄ 1-3 of 3 ► Last

Save   Notify   Add   Update/Display   Include History