

### About Agency Use 1

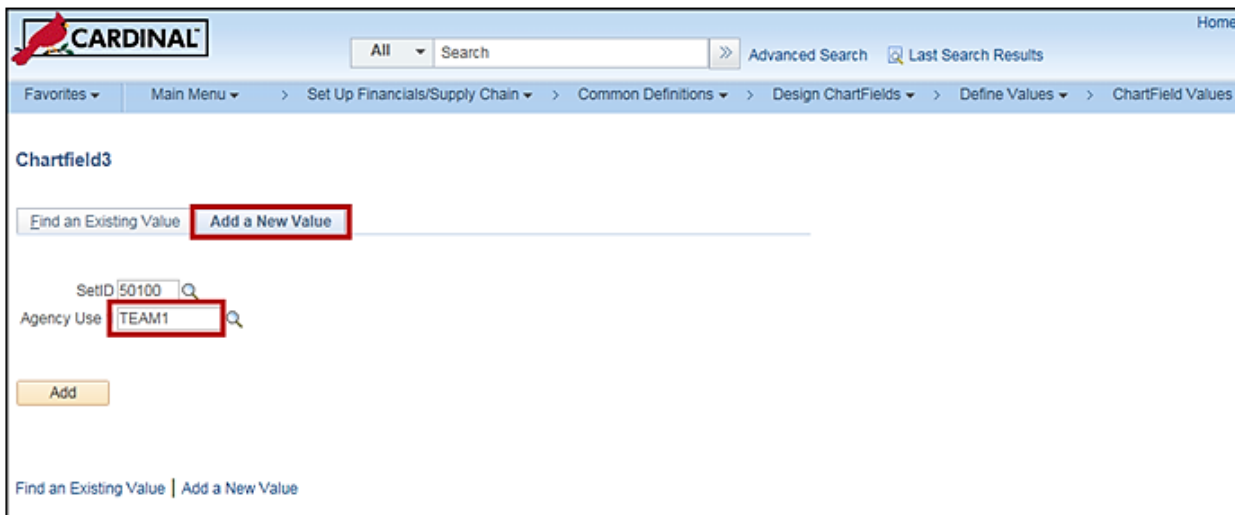
The **Agency Use 1** ChartField is a flexible field that you can use to track work efforts / projects of a miscellaneous nature that are not billed automatically. The Agency Use 1 field does not stand on its own, but is used as a tag in conjunction with a cost center and/or a project.

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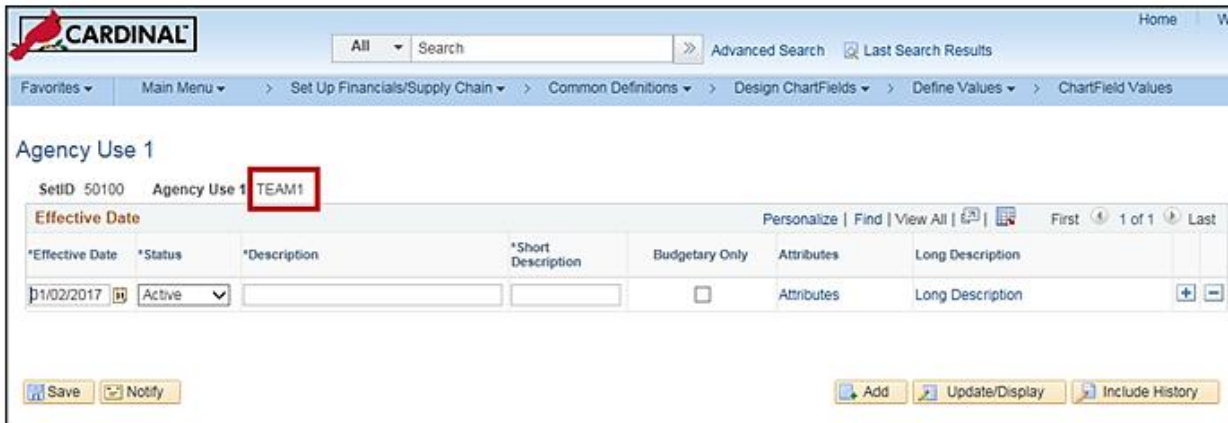
### To Add an Agency Use 1 Value

- 1 Navigate to **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values**. On the ChartField Values page, click the **Agency Use 1** link. Click on the **Add a New Value** tab.



- 2 Enter the **SetID** of **50100** and the **Agency Use 1** value you wish to add. The **Agency Use 1** value may be up to 10 characters long. Click the **Add** button. The **Agency Use 1** page is displayed.

## 501 GL336 Add/Update Agency Use 1 ChartField



Agency Use 1

SetID 50100 Agency Use 1 **TEAM1**

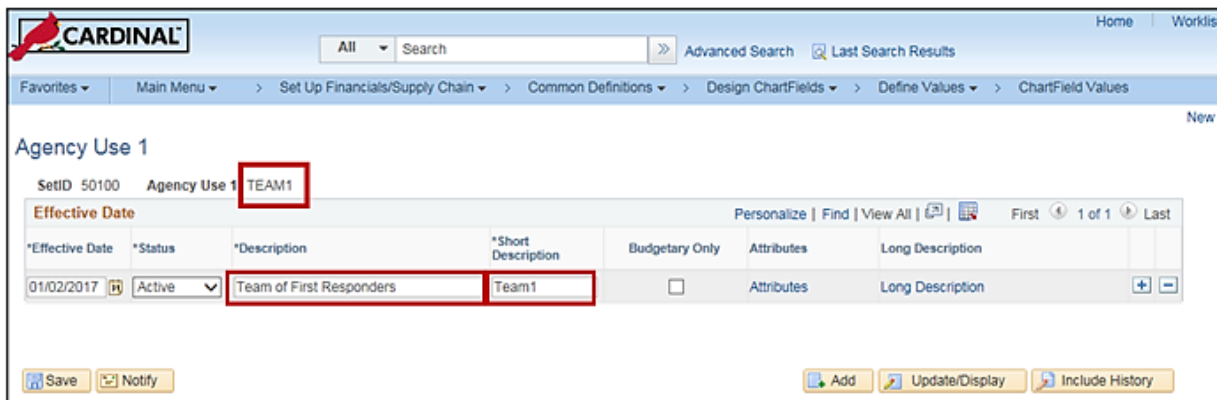
*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active			<input type="checkbox"/>	Attributes	Long Description

Buttons: Save, Notify, Add, Update/Display, Include History

- The values entered on the **Add** tab default to the top of the page.
- Enter the **Effective Date** (a required field) which is the date the Agency Use 1 ChartField is opened. The default value is the current date. The **Status** field (also a required field) represents the status as of the effective date and the default is set to **Active**. The **Effective Date** should be set to the earliest date the Agency Use 1 value should be used.

**Note:** If used on Timesheets, make the effective date the Monday prior to the first date you want it to be available for users to enter on their Timesheets. Because the Cardinal workweek view is Monday through Sunday, any date other than Monday will not be available until the following Monday.

- Enter a **Description** and **Short Description** (required fields) of the Agency Use 1 ChartField value. The **Description** field allows 30 characters; the **Short Description** allows 10.



Agency Use 1

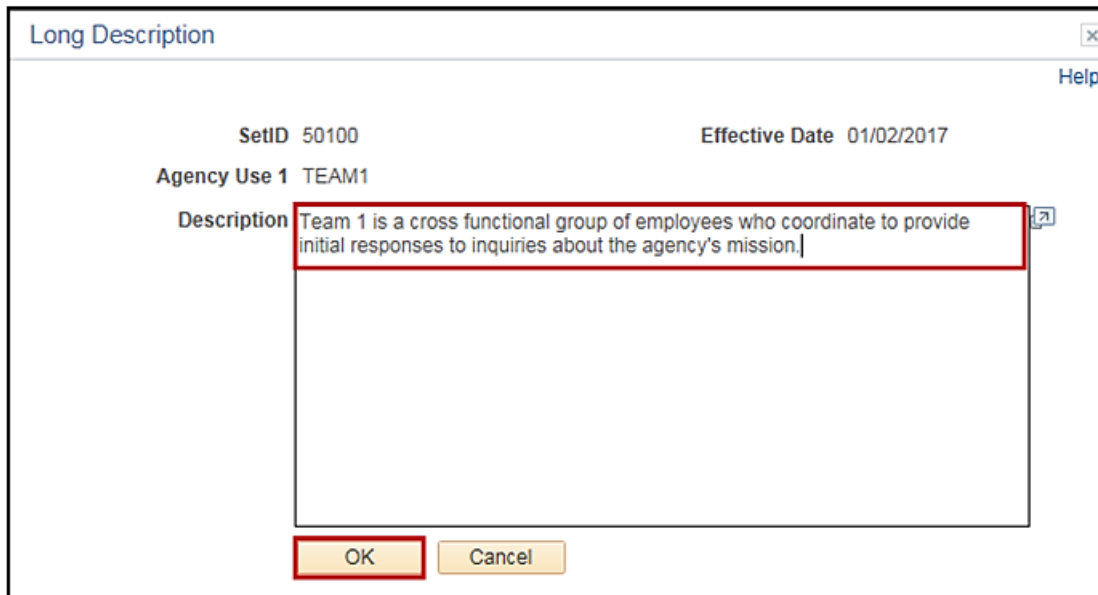
SetID 50100 Agency Use 1 **TEAM1**

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active	Team of First Responders	Team1	<input type="checkbox"/>	Attributes	Long Description

Buttons: Save, Notify, Add, Update/Display, Include History

## 501 GL336 Add/Update Agency Use 1 ChartField

- 6 There is also a link in the grid to add a long text description. The long description is not a required field. To add a long description, click on the **Long Description** link; enter the text and click **OK**.



Long Description

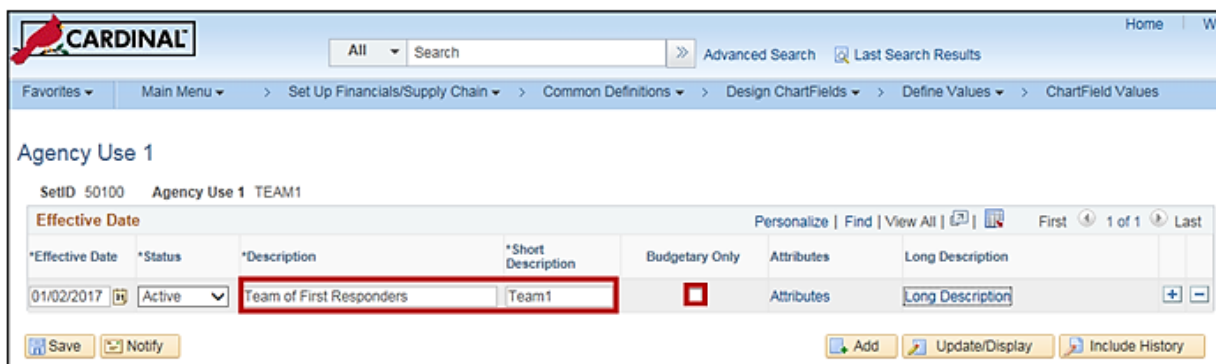
SetID 50100 Effective Date 01/02/2017

Agency Use 1 TEAM1

Description Team 1 is a cross functional group of employees who coordinate to provide initial responses to inquiries about the agency's mission.

OK Cancel

- 7 You return to the **Agency Use 1** page. If this is a budgetary only value, select the **Budgetary Only** checkbox. If you select **Budgetary Only**, expenditure transactions are not tracked. It would be unusual for this checkbox to be checked.



Agency Use 1

SetID 50100 Agency Use 1 TEAM1

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active	Team of First Responders	Team1	<input checked="" type="checkbox"/>	Attributes	Long Description

Save Notify Add Update/Display Include History

- 8 You may also attach attributes. More than one attribute can be attached to the **Agency Use 1** ChartField and is used to facilitate interface and reporting processing. When you click the **Attributes** link, the **ChartField Attributes** page appears. Use this page to select one (or more) of the **ChartField Attribute** and **ChartField Attribute Value** combinations that apply to the added **Agency Use 1** value.



# General Ledger Job Aid

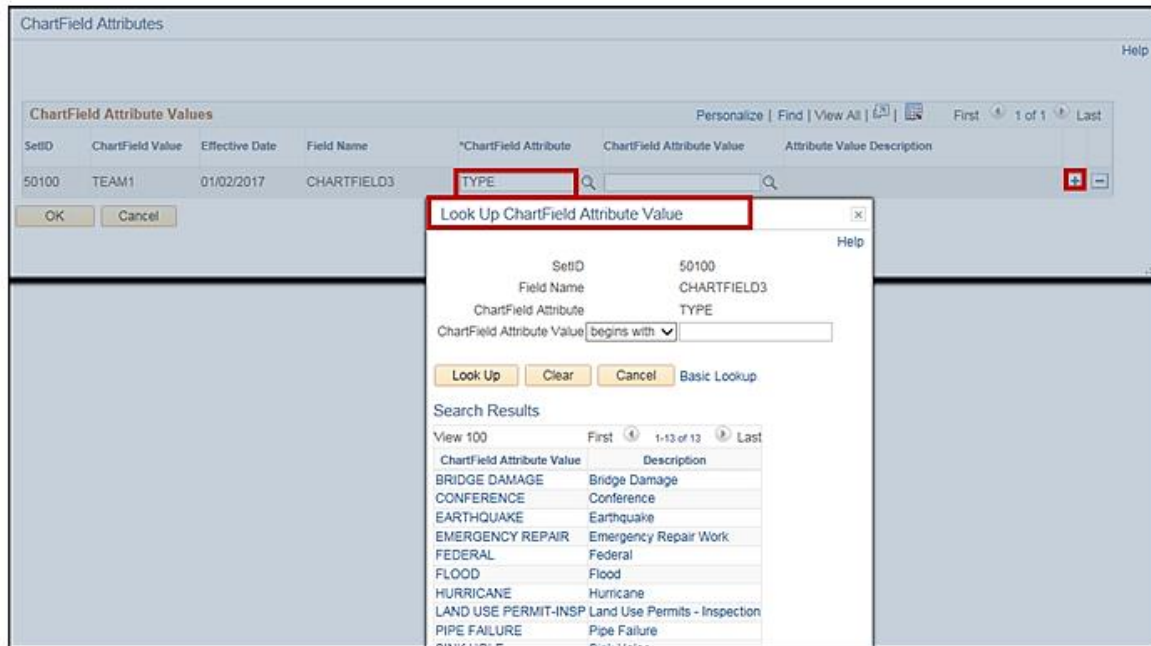
## 501 GL336 Add/Update Agency Use 1 ChartField

The screenshot shows a window titled "ChartField Attributes" with a "Help" button in the top right corner. Below the title bar is a menu bar with "Personalize", "Find", "View All", and a "Print" icon. To the right of the menu bar are navigation buttons: "First", "1 of 1", and "Last". The main area contains a table with the following columns: "SetID", "ChartField Value", "Effective Date", "Field Name", "\*ChartField Attribute", "ChartField Attribute Value", and "Attribute Value Description". The table has one row with the following data: SetID: 50100, ChartField Value: TEAM1, Effective Date: 01/02/2017, Field Name: CHARTFIELD3, \*ChartField Attribute: (empty field with magnifying glass), ChartField Attribute Value: (empty field with magnifying glass), and Attribute Value Description: (empty field). At the bottom of the table are two buttons: a plus sign (+) and a minus sign (-). At the bottom of the window are two buttons: "OK" and "Cancel".

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description
50100	TEAM1	01/02/2017	CHARTFIELD3			

- 9 There are two **ChartField Attributes** for **Agency Use 1: Type** and **Event**. **Type** is generally used to track expenditures related to a cost center (e.g., conferences, management programs, etc.) or to summarize events. **Event** is generally used to track expenditures that may become billable projects (e.g., floods, hurricanes, ice).
- 10 If you wish to select **Type**, you can select it from the magnifying glass under **ChartField Attribute** or directly key it into the field.
- 11 For each **ChartField Attribute** attached, a combination from the **ChartField Attribute Value** should also be attached. Some of the **ChartField Attribute Values** which can be selected for the **Type ChartField Attribute** include: **Conference, Flood, Hurricane, Slide, or Snow-Ice**. To attach a second **ChartField Attribute** and **ChartField Attribute Value**, a second row can be added with the **+** button and the process repeated.

## 501 GL336 Add/Update Agency Use 1 ChartField



The screenshot shows the 'ChartField Attributes' window with a table containing one row. A dialog box titled 'Look Up ChartField Attribute Value' is open, displaying search criteria and a list of search results.

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description
50100	TEAM1	01/02/2017	CHARTFIELD3	TYPE		

SetID	50100
Field Name	CHARTFIELD3
ChartField Attribute	TYPE
ChartField Attribute Value	begins with

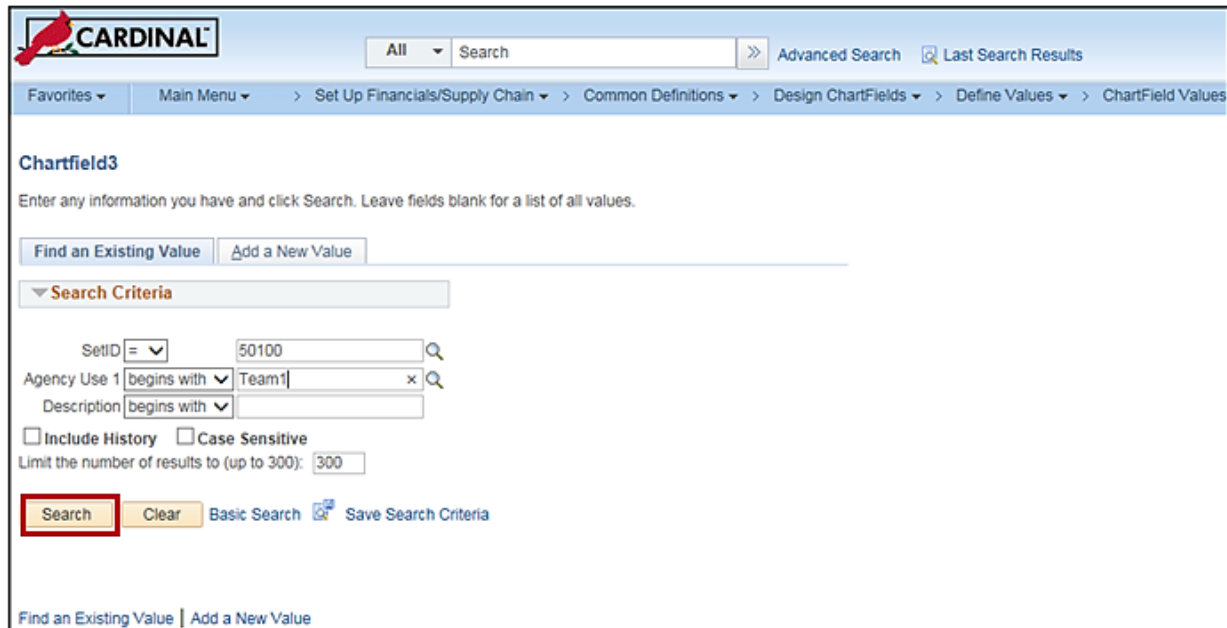
ChartField Attribute Value	Description
BRIDGE DAMAGE	Bridge Damage
CONFERENCE	Conference
EARTHQUAKE	Earthquake
EMERGENCY REPAIR	Emergency Repair Work
FEDERAL	Federal
FLOOD	Flood
HURRICANE	Hurricane
LAND USE PERMIT-INSP	Land Use Permits - Inspection
PIPE FAILURE	Pipe Failure
PIPE LINE	Pipe Line

- 12 **Event** is a second **ChartField Attribute**. **Event** should be used in the case of a possible disaster. If an **Event ChartField Attribute** is required, please request the Fiscal Division to create the **ChartField Attribute** and **ChartField Attribute Value**.
- 13 After the **ChartField Attribute(s)** and **ChartField Attribute Value(s)** are selected, click the **OK** button, which takes you back to the **Agency Use 1** page. Click the **Save** button on the **Agency Use 1** page to complete the add process.

## 501 GL336 Add/Update Agency Use 1 ChartField

### To Update an Agency Use 1 Value

- 1 Navigate to **Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values**. The **ChartField Values** page appears. Click on the **Agency Use 1** link. The **Agency Use 1** page is displayed. Click on the **Find an Existing Value** tab. Key in the **SetID** of **50100** and the **Agency Use 1** value you wish to update. Assume the value is **AgencyUse**. Click the **Search** button.



**Chartfield3**

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

Search Criteria

SetID = 50100

Agency Use 1 begins with Team1

Description begins with

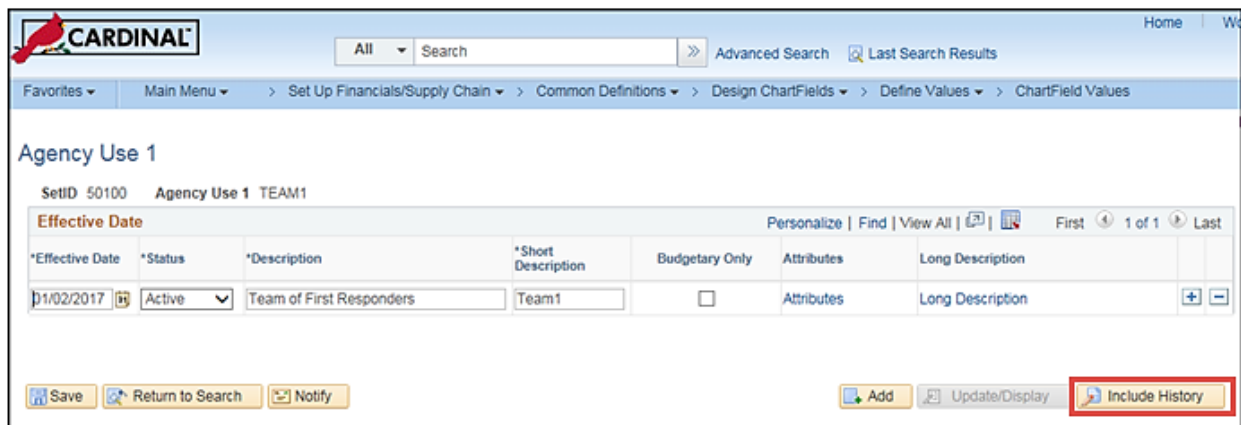
Include History  Case Sensitive

Limit the number of results to (up to 300): 300

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | Add a New Value

- 2 The **Agency Use 1** page with the current effective dated row appears.



**Agency Use 1**

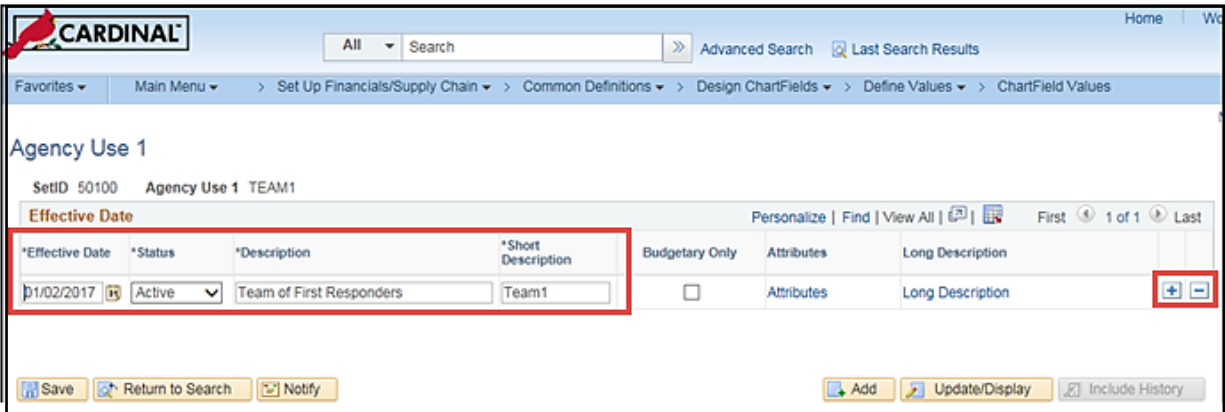
SetID 50100 Agency Use 1 TEAM1

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active	Team of First Responders	Team1	<input type="checkbox"/>	Attributes	Long Description

Save | Return to Search | Notify | Add | Update/Display | Include History

## 501 GL336 Add/Update Agency Use 1 ChartField

- Click the **Include History** button and you are able to **Update/Display**. The **Update/Display** feature allows you to insert effective dated rows which are greater than the most recent effective dated row.



Agency Use 1

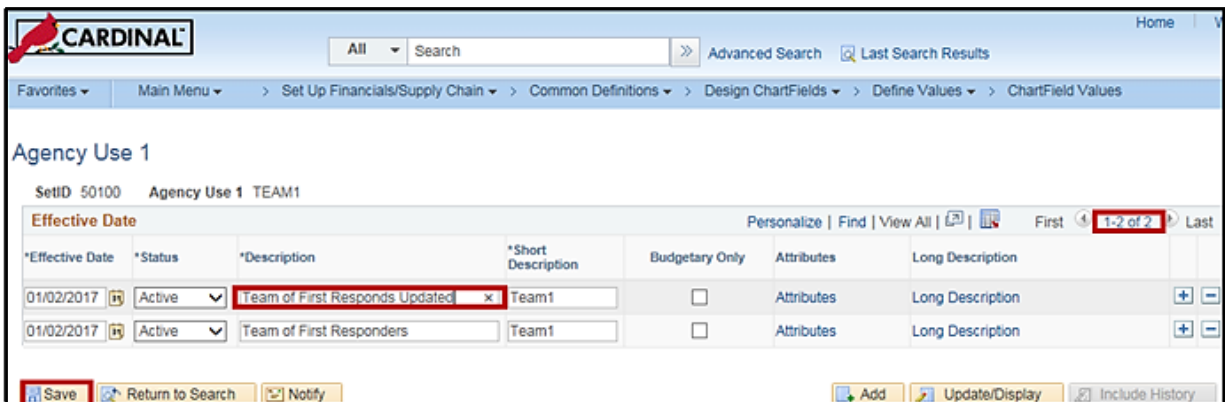
SetID 50100 Agency Use 1 TEAM1

Effective Date

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active	Team of First Responders	Team1	<input type="checkbox"/>	Attributes	Long Description

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History

- To add a new row in order to update the current effective dated row, click the **+**. A new row is added with the current date and all other values copied from row 1. You may update either from the **Agency Use 1** page (e.g., to update the **Description** or **Short Description**) or by clicking on a link (e.g., the **Attribute** link). Once the update is completed, click the **Save** button. There are now two rows with the most current effective dated row being row 1. The update process is complete.



Agency Use 1

SetID 50100 Agency Use 1 TEAM1

Effective Date

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active	Team of First Responders Updated	Team1	<input type="checkbox"/>	Attributes	Long Description
01/02/2017	Active	Team of First Responders	Team1	<input type="checkbox"/>	Attributes	Long Description

Buttons: Save, Return to Search, Notify, Add, Update/Display, Include History