

Agency Use 1 Overview

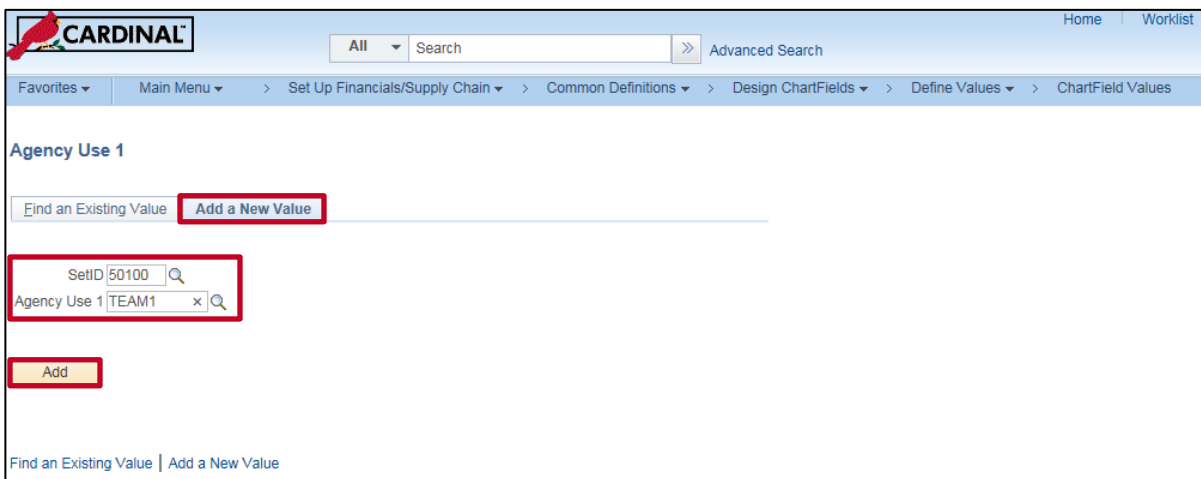
The **Agency Use 1** ChartField is a flexible field that you can use to track work efforts/projects of a miscellaneous nature that are not billed automatically. The **Agency Use 1** field does not stand on its own, but is used as a tag in conjunction with a cost center and/or a project.

Table of Contents

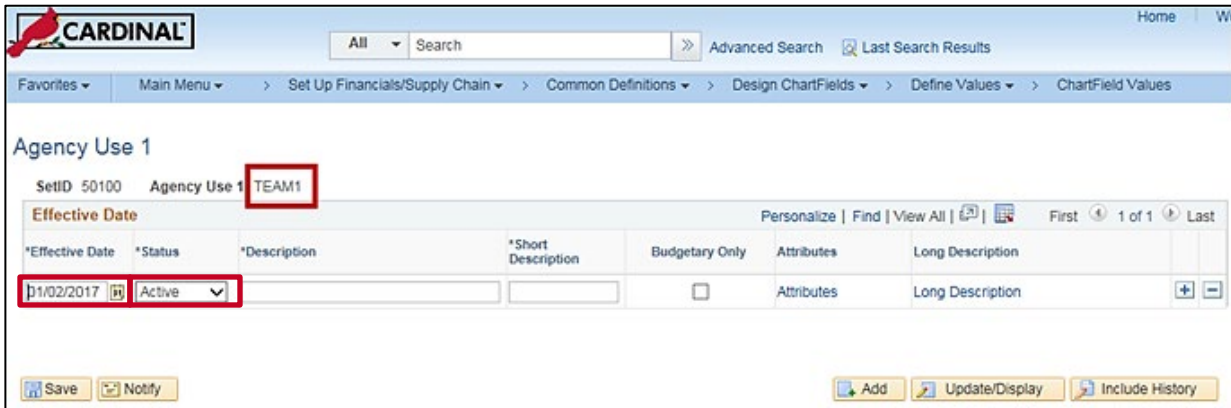
To Add an Agency Use 1 Value 1
To Update an Agency Use 1 Value 6

To Add an Agency Use 1 Value

1. Navigate using the following path:
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. The **Agency Use 1** page displays.
Click 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 displays.



Agency Use 1

SetID 50100 Agency Use 1 **TEAM1**

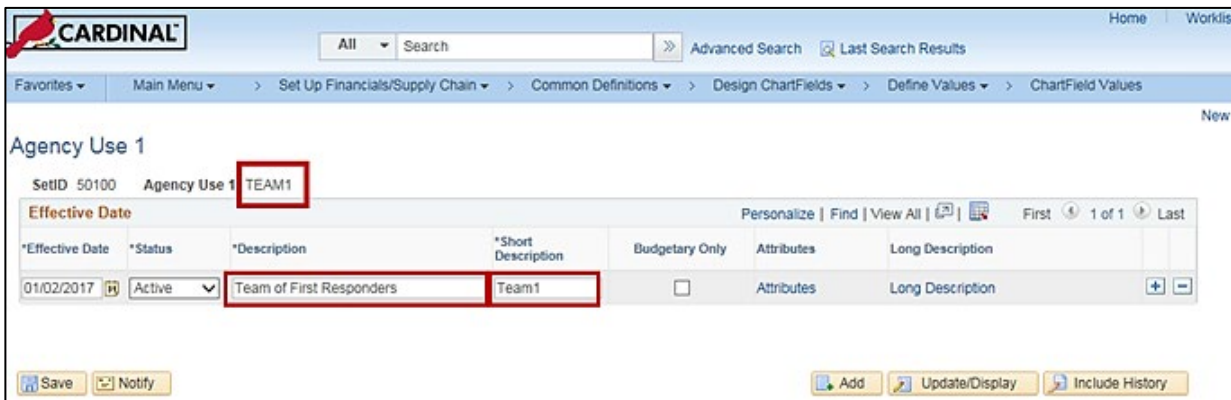
Effective Date

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
01/02/2017	Active			<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 work week view is Monday through Sunday, any date other than Monday will not be available until the following Monday.



Agency Use 1

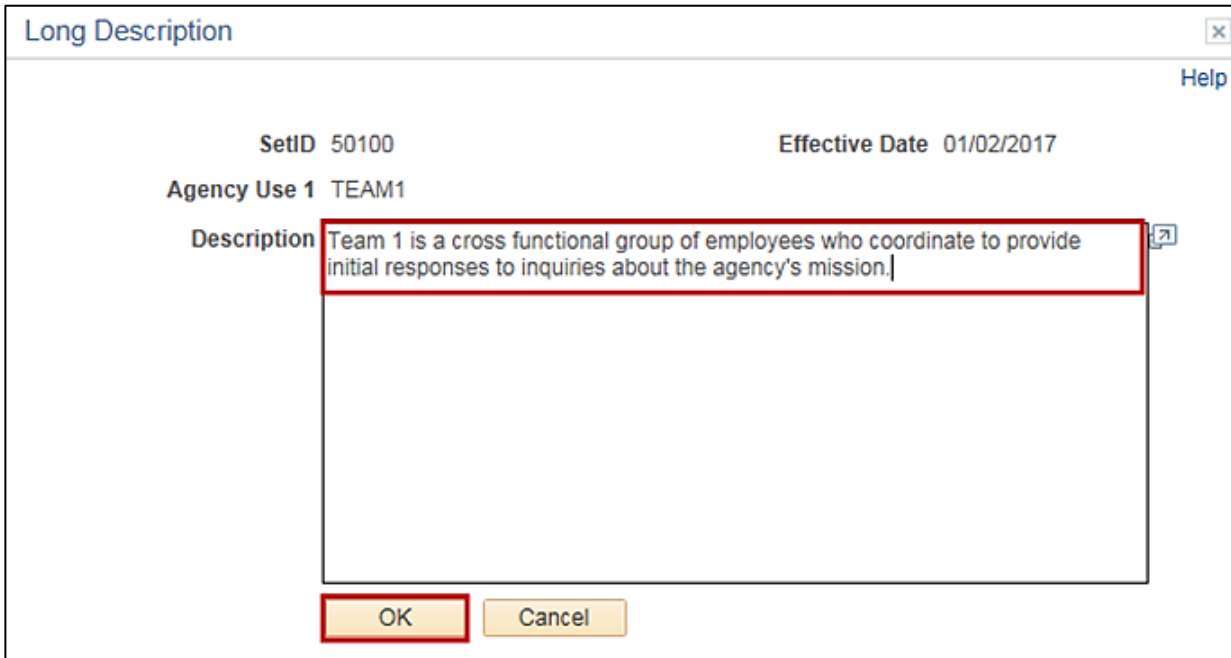
SetID 50100 Agency Use 1 **TEAM1**

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, Notify, Add, Update/Display, Include History

- 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.
- 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 the **Long Description** link.



Long Description

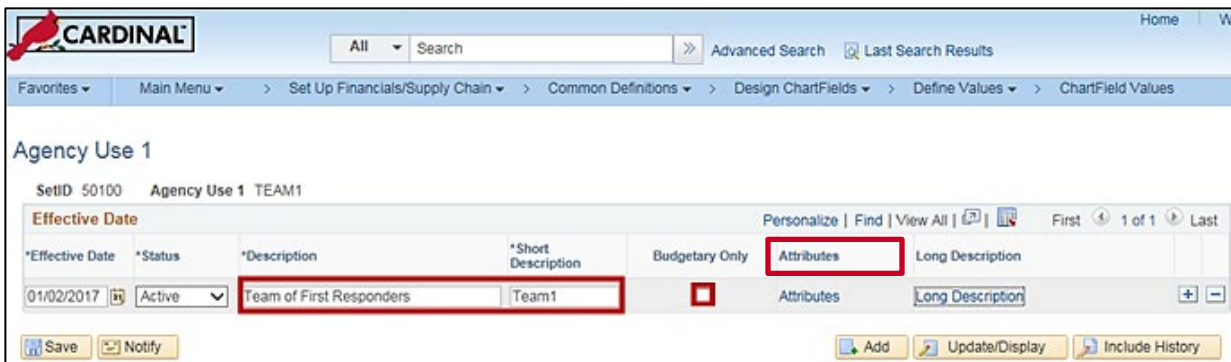
SetID 50100 Effective Date 01/02/2017

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. The **Long Description** pop-up box displays. Enter the text and click the **OK** button.
8. You return to the **Agency Use 1** page.



CARDINAL

All Search Advanced Search Last Search Results

Favorites Main Menu Set Up Financials/Supply Chain Common Definitions Design ChartFields Define Values ChartField Values

Agency Use 1

SetID 50100 Agency Use 1 TEAM1

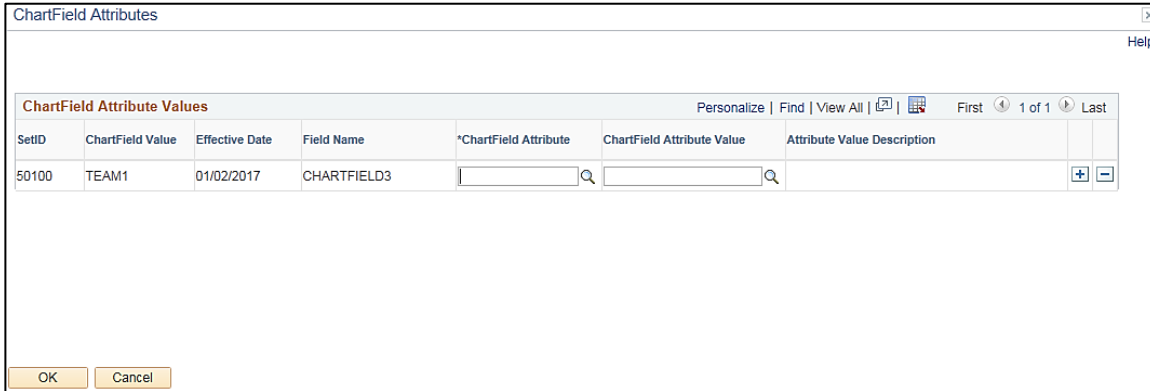
Effective Date 01/02/2017 Status Active

*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

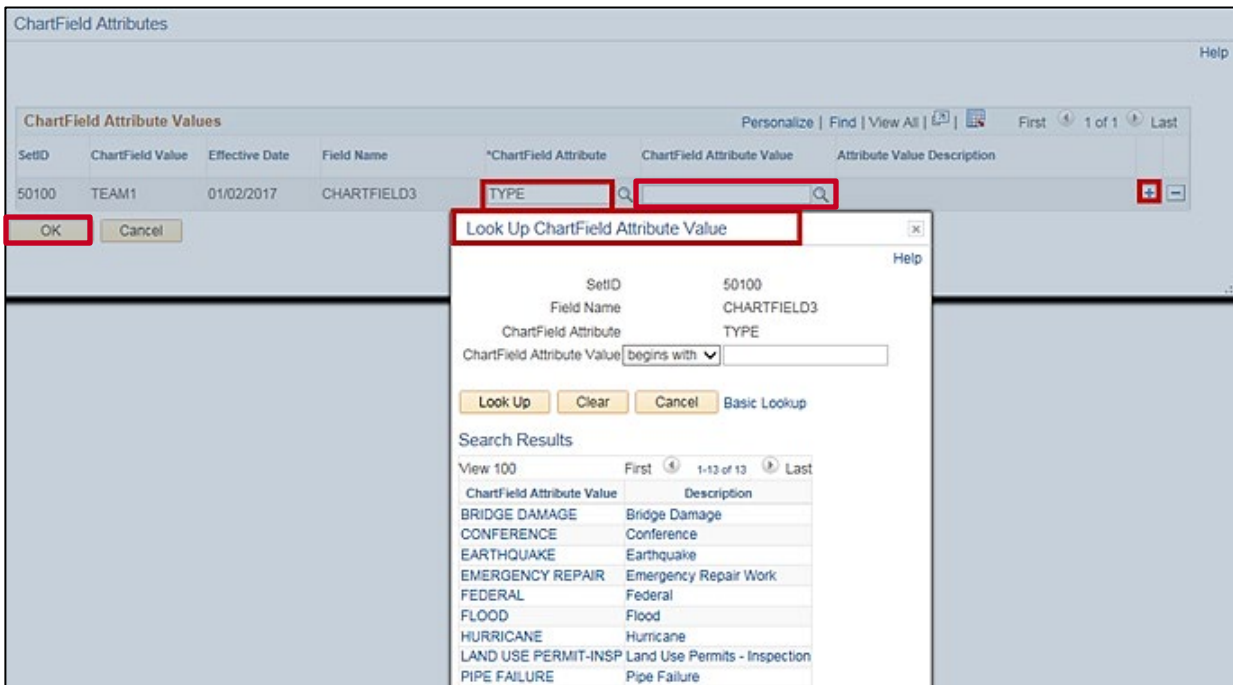
9. If this is a budgetary only value, select the **Budgetary Only** checkbox. If you select **Budgetary Only**, expenditure transactions are not tracked. It would be unusual for this checkbox to be checked.
10. You may also attach attributes. More than one attribute can be attached to the **Agency Use 1** ChartField and is used to facilitate interface and reporting processing. When you click the **Attributes** link, the **ChartField Attributes** page displays.

501 GL336: Add/Update Agency Use 1 ChartField



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

- 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.
- 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) or to summarize events. **Event** is generally used to track expenditures that may become billable projects (e.g., floods, hurricanes, ice).



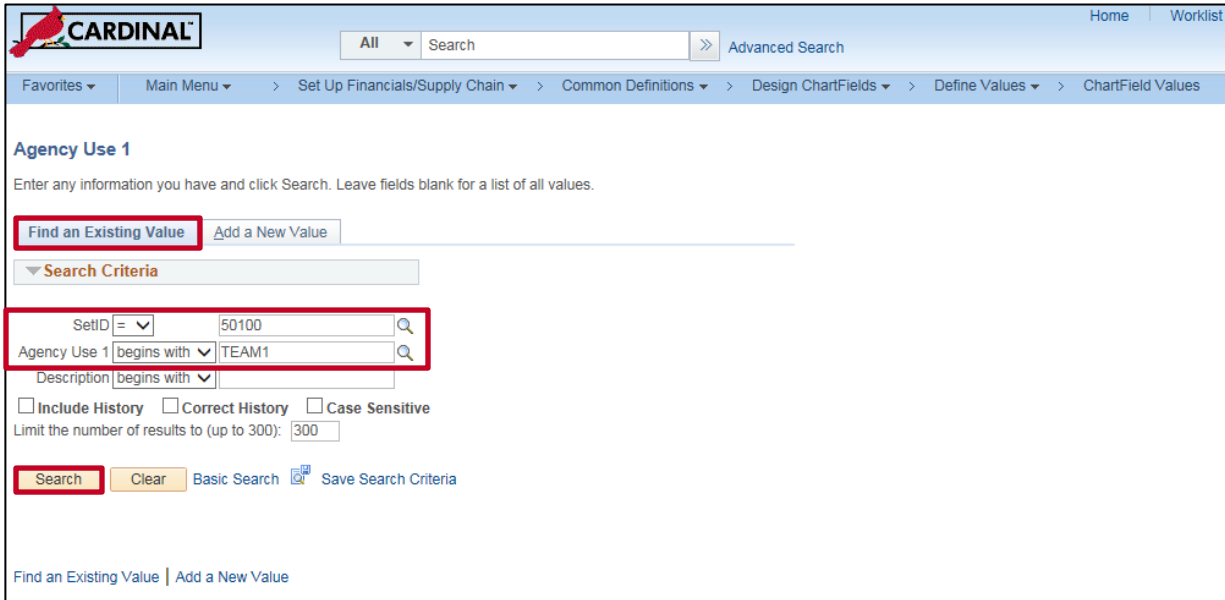
ChartField Attribute Value	Description
BRIDGE DAMAGE	Bridge Damage
CONFERENCE	Conference
EARTHQUAKE	Earthquake
EMERGENCY REPAIR	Emergency Repair Work
FEDERAL	Federal
FLOOD	Flood
HURRICANE	Hurricane
LAND USE PERMIT-INSP	Land Use Permits - Inspection
PIPE FAILURE	Pipe Failure

- If you wish to select **Type**, you can select it from the magnifying glass under **ChartField Attribute** or directly key it into the field.
- For each **ChartField Attribute** attached, a combination from the **ChartField Attribute Value** should also be attached. Some of the **ChartField Attribute Values** that 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.

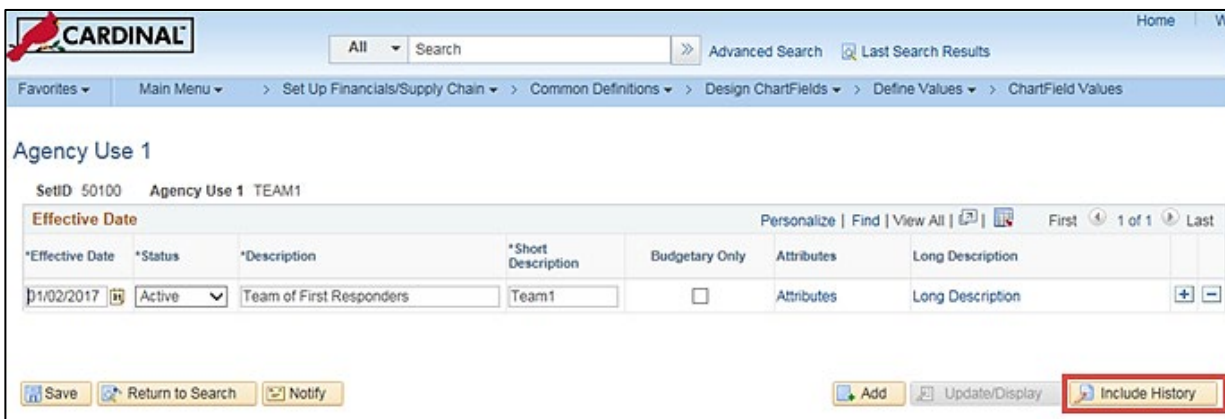
15. **Event** is a second **ChartField Attribute**. **Event** should be used in the case of a possible disaster. If an **Event ChartField Attribute** is required, please request the Fiscal Division to create the **ChartField Attribute** and **ChartField Attribute Value**.
16. After the **ChartField Attribute(s)** 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.

To Update an Agency Use 1 Value

- Navigate using the following path:
Main Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Values.
 The **ChartField Values** page appears. Click the **Agency Use 1** link. The **Agency Use 1** page displays.



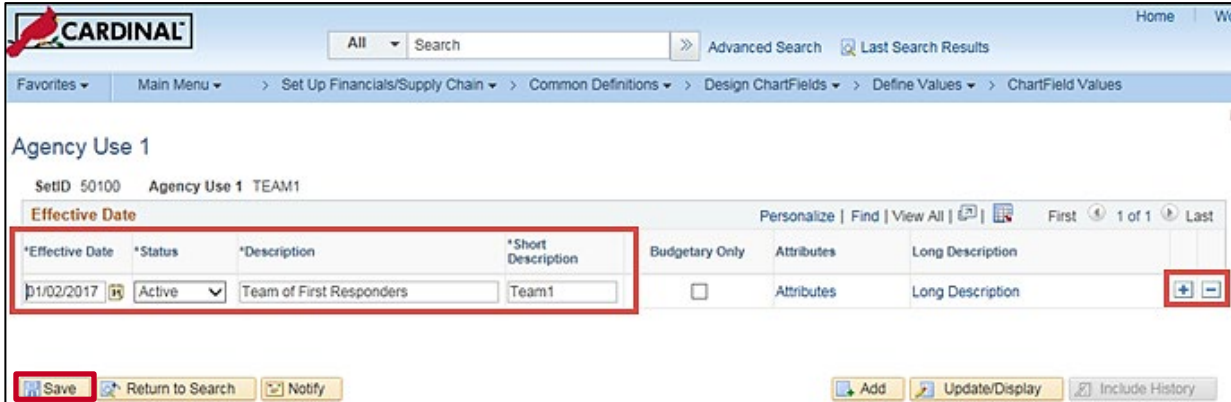
- Click the **Find an Existing Value** tab. Key in the **SetID** of **50100** and the **Agency Use 1** value you wish to update. In this example, the value is **TEAM1**. Click the **Search** button.
- The **Agency Use 1** page with the current effective dated row displays.



*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
11/02/2017	Active	Team of First Responders	Team1	<input type="checkbox"/>	Attributes	Long Description

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

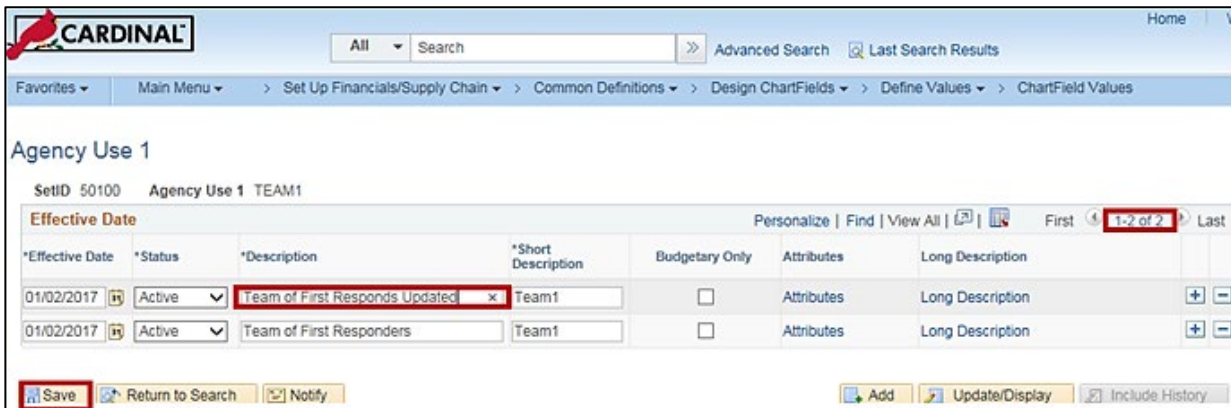
SetID 50100 Agency Use 1 TEAM1

Effective Date Personalize | Find | View All | First 1 of 1 Last

*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

- To add a new row, in order to update the current effective dated row, click the (+) button. A new row is added with the current date and all other values copied from row 1.



Agency Use 1

SetID 50100 Agency Use 1 TEAM1

Effective Date Personalize | Find | View All | First 1-2 of 2 Last

*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

Save Return to Search Notify Add Update/Display Include History

- 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 **Attributes** 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.