



Agency Use 1 Overview (VDOT Only)

This job aid reviews the process to add/update the Agency Use 1 ChartField.

The **Agency Use 1** ChartField is a flexible field that can be used 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, event, and/or a project.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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GL336 Add/Update Agency Use 1 ChartField (VDOT Only)

Revision History

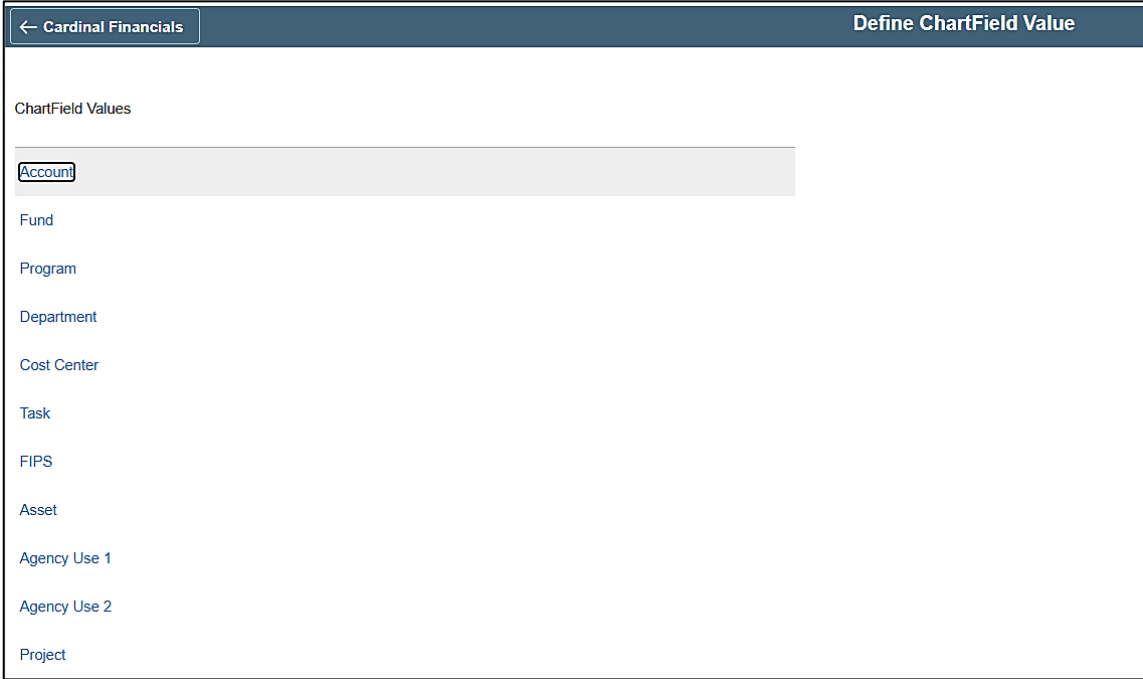
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
2/15/2023	Baseline.



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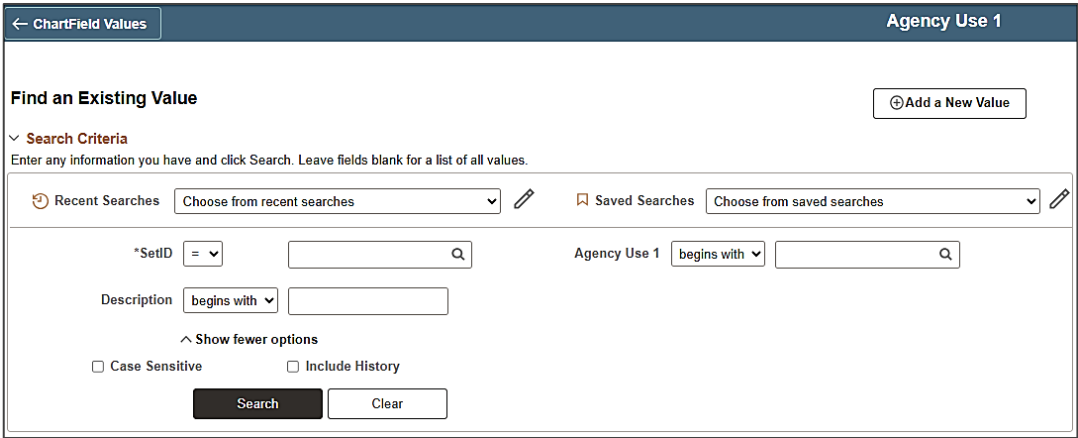
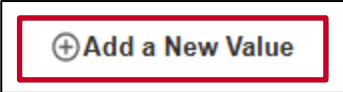
Add an Agency Use 1 Value

Step	Action
1.	Navigate using the following path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > Define ChartField Value The Define ChartField Value page displays. 
2.	Click the Agency Use 1 link. 

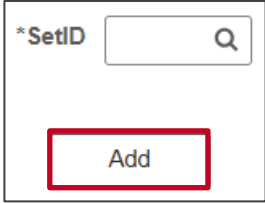
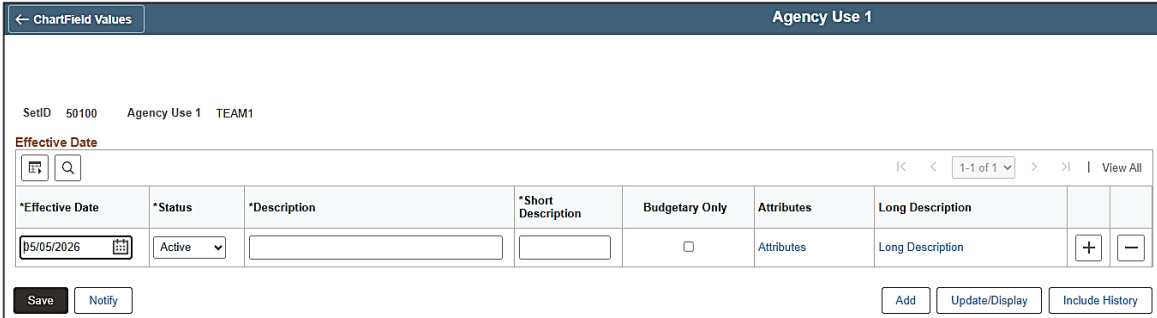


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Step	Action
	The Agency Use 1 Find an Existing Value Search page displays. 
3.	Click the Add a New Value button. 
	The Agency Use 1 Add a New Value page displays. 
4.	Enter the Agency Business Unit number in the SetID field. 
5.	Enter the Agency Use 1 value to be added in the Agency Use 1 field. 

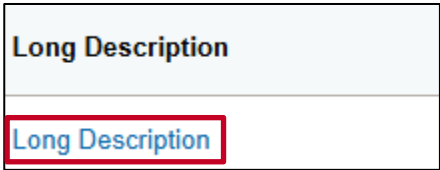
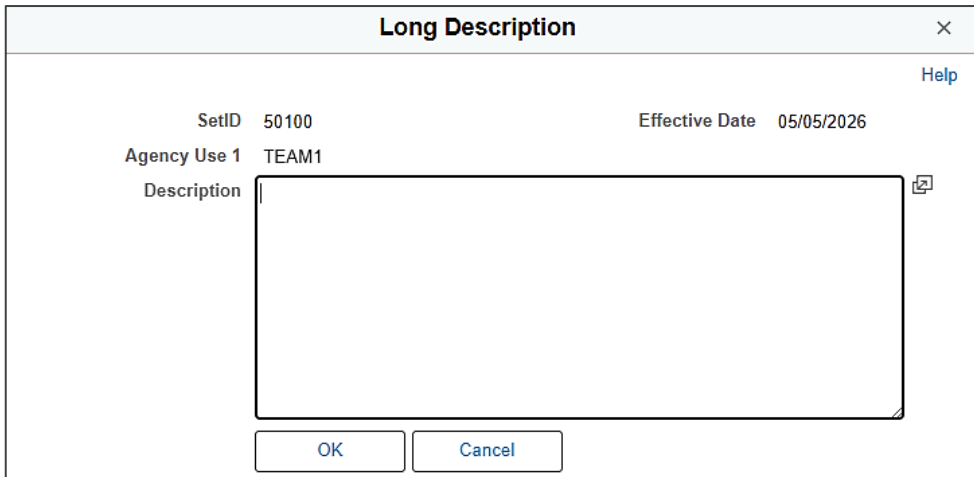
GL336 Add/Update Agency Use 1 ChartField (VDOT Only)

Step	Action
6.	Click the Add button. 
	The Agency Use 1 page displays with the SetID and Agency Use 1 values entered from the previous page. 
7.	Enter a Description and Short Description (required) of the Agency Use 1 ChartField value. The Description field allows 30 characters, and the Short Description field allows 10 characters. 
	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 field should be set to the earliest date that the Agency Use 1 value should be used.
	If the Agency Use ChartFields are used on timesheets, make the effective date the Monday prior to the first date available for users to enter on their timesheets because the Cardinal work week view is Monday through Sunday. Any date other than Monday, and the ChartField will not be available for use on the timesheet until the following Monday.



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Step	Action
8.	Click the Long Description link to add a long text description (not required). 
The Long Description page displays in pop-up window. 	
9.	Enter a description in Description box. 
10.	Click the OK button. 



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Step	Action
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The **Agency Use 1** page redispays.



If the **Budgetary Only** checkbox option is selected, expenditure transactions are not tracked, and this value will not be able to be used on expenditures. It would be unusual for this checkbox option to be selected, and it should only be selected if this is a budgetary only value.

Budgetary Only	Attributes
☐	Attributes



One or more Attributes can be attached to the Agency Use 1 ChartField value and used to facilitate interface and reporting processing.

11.

Click the **Attributes** link if an Attribute will be added to the Agency Use 1 ChartField value.

Budgetary Only	Attributes
☐	Attributes

The **ChartField Attributes** page displays. 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.

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Step	Action				
12.	Click the ChartField Attribute Look up icon and select the applicable ChartField Attribute. <table border="1"> <thead> <tr> <th>*ChartField Attribute</th><th>ChartField Attribute Value</th></tr> </thead> <tbody> <tr> <td> </td><td> </td></tr> </tbody> </table>	*ChartField Attribute	ChartField Attribute Value		
*ChartField Attribute	ChartField Attribute 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 a second ChartField Attribute. Event should be used in the case of a possible disaster. Event is generally used to track expenditures that may become billable projects (e.g., floods, hurricanes, ice). If an Event ChartField Attribute is required, please request the Fiscal Division to create the ChartField Attribute and ChartField Attribute Value.				
13.	Click the ChartField Attribute Value Look up icon and select the applicable ChartField Attribute Value. <table border="1"> <thead> <tr> <th>*ChartField Attribute</th><th>ChartField Attribute Value</th></tr> </thead> <tbody> <tr> <td> </td><td> </td></tr> </tbody> </table>	*ChartField Attribute	ChartField Attribute Value		
*ChartField Attribute	ChartField Attribute Value				
	For each ChartField Attribute attached, a 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".				
14.	To attach a second ChartField Attribute and ChartField Attribute Value, a second row can be added with the (+) button and the process repeated. <table border="1"> <thead> <tr> <th colspan="2">Attribute Value Description</th></tr> </thead> <tbody> <tr> <td> </td><td> + - </td></tr> </tbody> </table>	Attribute Value Description			+ -
Attribute Value Description					
	+ -				
15.	Click the OK button after the applicable ChartField Attribute and ChartField Attribute Value have been selected. <table border="1"> <tr> <td>OK</td> <td>Cancel</td> </tr> </table>	OK	Cancel		
OK	Cancel				

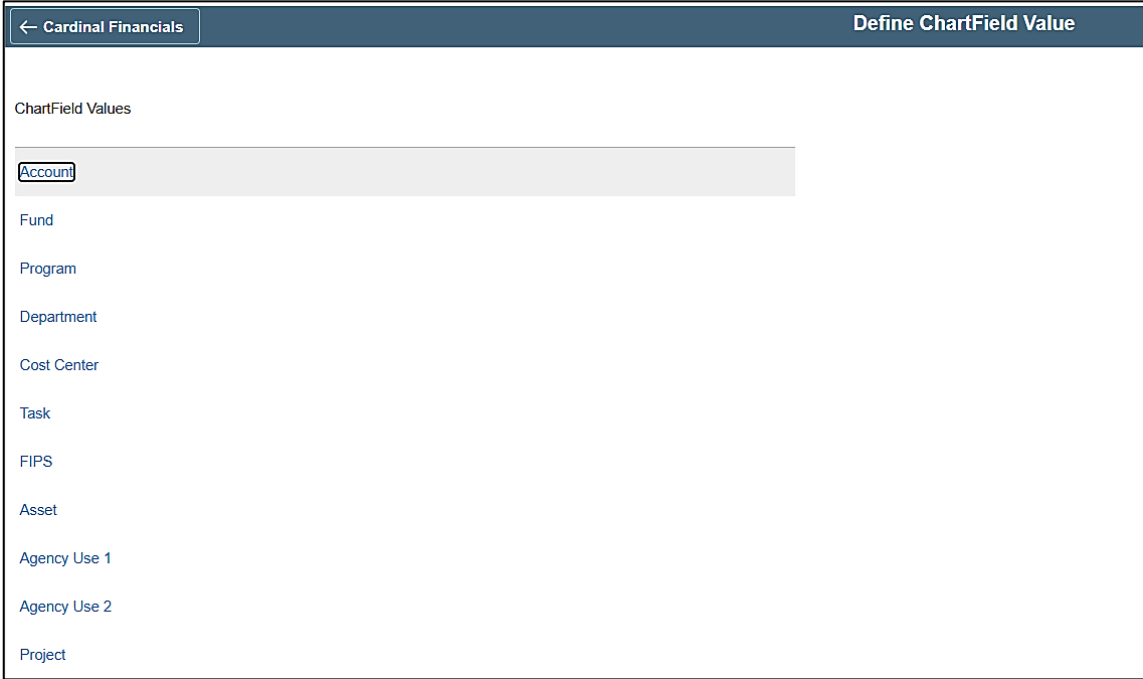
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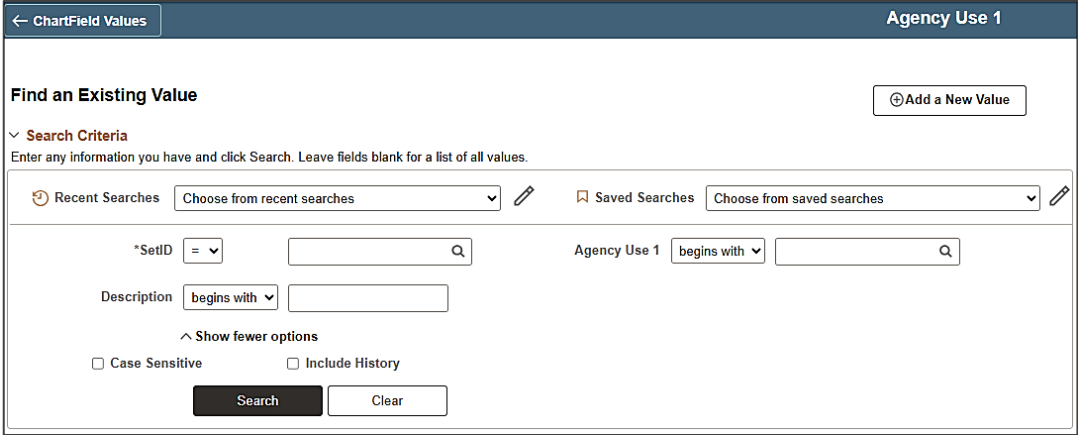
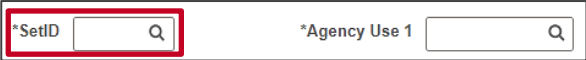
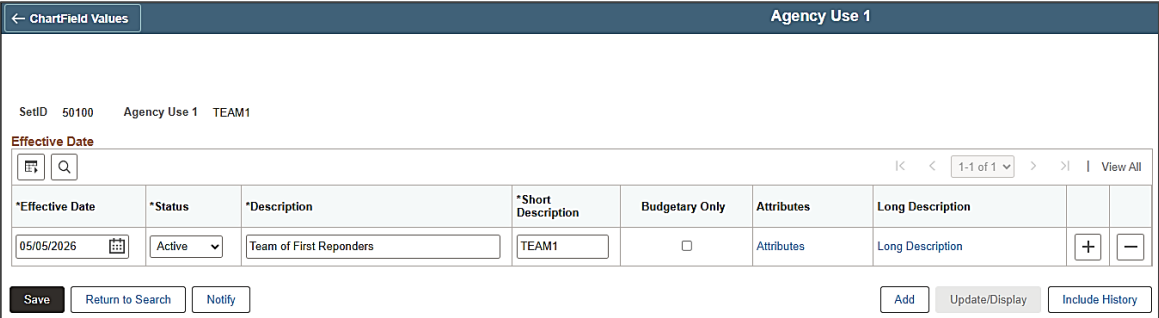
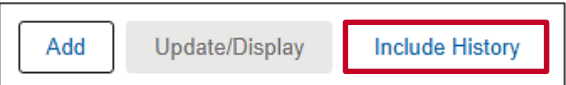
Update an Agency Use 1 Value

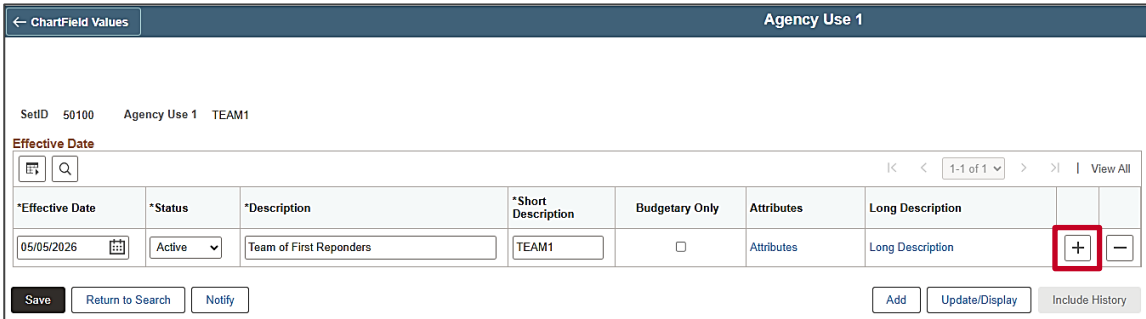
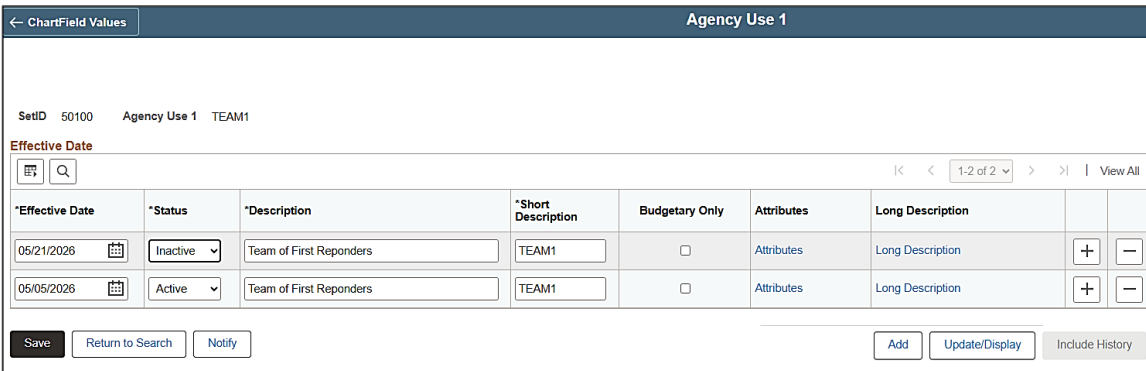
Step	Action
1.	Navigate using the following path: NavBar > Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > Define ChartField Value
The Define ChartField Value page displays. 	
2.	Click the Agency Use 1 link. 



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GL336 Add/Update Agency Use 1 ChartField (VDOT Only)

Step	Action
	The Agency Use 1 Find and Existing Value Search page displays. 
3.	Enter the Agency Business Unit number in the SetID field. 
4.	Enter the Agency Use 1 value to be updated in the Agency Use 1 field. 
5.	Click the Search button. 
	The Agency Use 1 page with the current effective dated row displays. 
6.	Click the Include History button to activate the Update/Display button. 

Step	Action
	The Update/Display button is now activated and displays. Add Update/Display Include History
	The Update/Display feature allows users to insert effective dated rows which are greater than the most recent effective dated row.
7.	Click the (+) button to add a new row. 
	The Agency Use 1 page with the current effective dated row displays. Note: A new row is added with the current date and all other values copied from row 1. 
	Make applicable updates to the Agency Use 1 page (e.g., to update the Description or Short Description) or click the Attributes link and make applicable updates (e.g., ChartField Attribute or ChartField Attribute Value).
8.	Click the Save button once all applicable updates are completed. Save Return to Search Notify