Chapter 15- Advance Processes

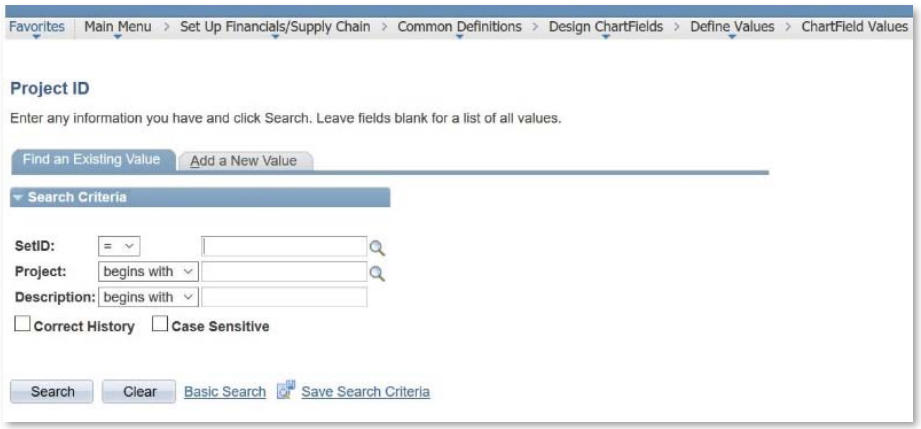
This section includes:

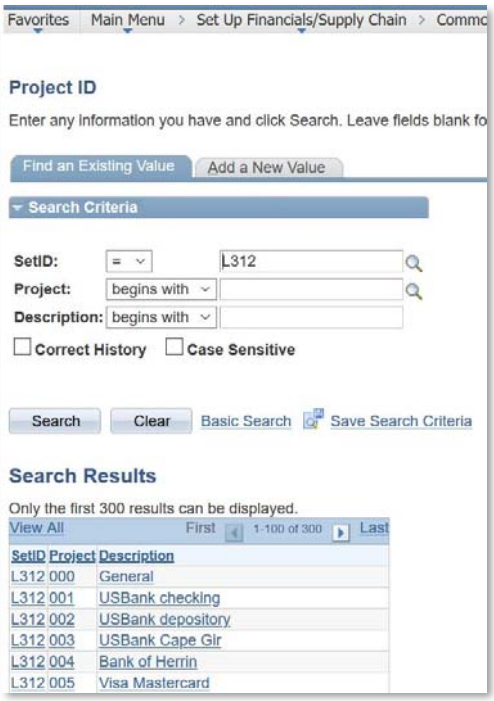
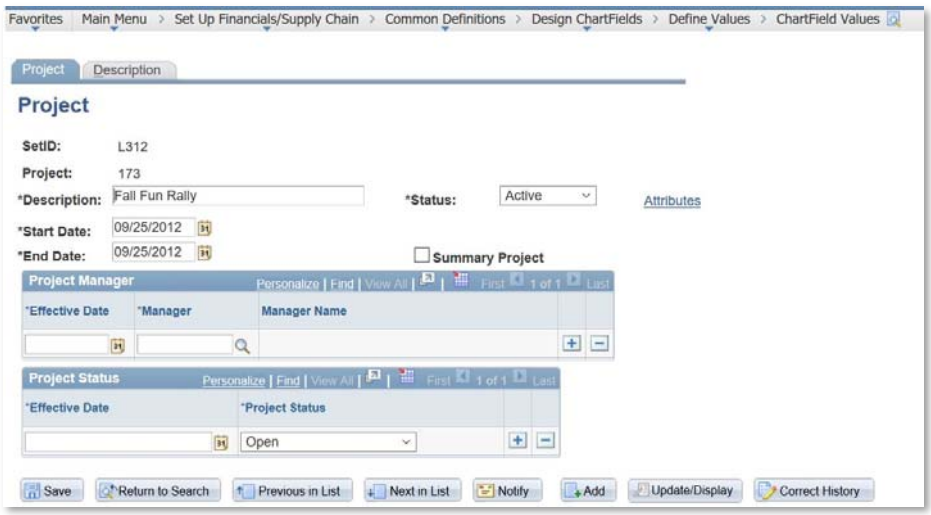
15.1 Project Code – Status Changes – Active / Inactive

15.2 Managing Locations

15.2.1 Add a Location

15.1 Project Code – Status Changes– Active/Inactive

Steps	Navigation	UPK
1. Change status of an existing project code to Active or Inactive.	Main Menu>Set Up Financials/Supply Chain> Common Definitions>Design Chartfield>Define Values>**Chartfield Values** 	
	Click the **Project** field.	
	Click the **Find an Existing Value** tab.	
	Enter Council number in **SetID** field or click the look up icon to find the council number.	
	Enter the desired project code into the **Project** field e.g. “456” or leave field blank and click the lookup icon to view all project codes. Click on the project or description to select the project code.	

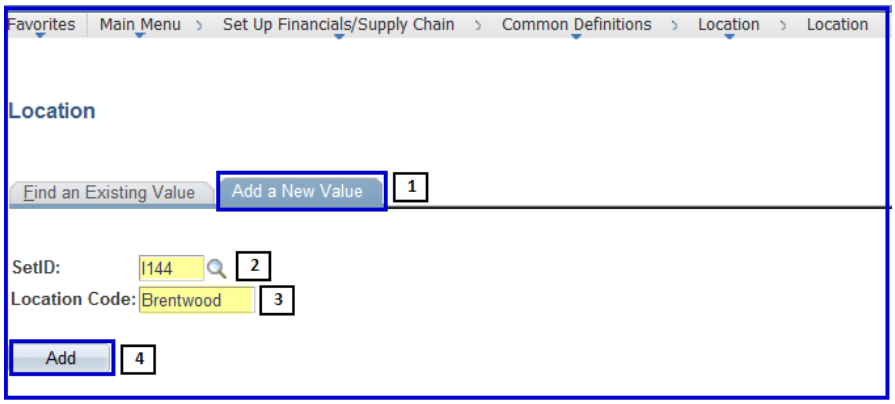
		
	 Check **√** the **Correct History** field before you begin.	
	Click the **Search** button.	
	Click on *Active* or *Inactive* in the **Status** field.	
	Click the **Save** button. 	
	Click the **Return to Search** button.	
	End of Procedure.	

15.2 Managing Locations

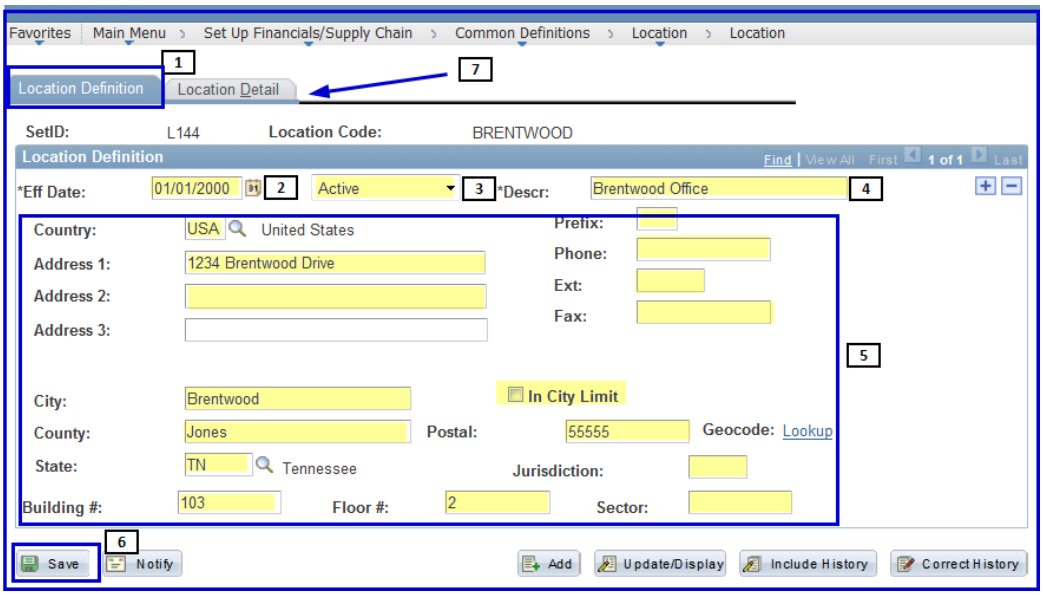
Locations are used in AP for shipping information and also in Asset Management for tagging assets by location.

15.2.1 Add a Location

Navigate to the page to add a location.



1. Click on the "Add a New Value" tab.
2. SetID: Enter your Business Unit
3. Location Code: Enter your choice (10 characters – no spaces)
4. Click Add.



1. Start on the "Location Definition" tab.
2. Effective date should be prior to any other uses of this location.
3. Set it to active.
4. Description of your choice
5. OPTION: Complete needed address and contact information.
6. Save your work.
7. OPTION: Location Detail is where you may enter the shipping contact name.