

Department Inactivation Job Aid

Departments that are no longer used/needed may be inactivated. Inactivating a department prevents any transactions erroneously posting to the department while maintaining all historical data for reporting purposes. To request or approve the inactivation of a department, please follow the steps in the relevant section of this job aid.

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Overview

Inactivation prevents new transactions from being posted but does not delete any historical transactions or other data associated with a department. The department and all associated data are still available for reporting.

Department inactivation can be requested within Financials by the Budget Managers of the respective departments. The process will verify the eligibility of a department for inactivation (see the Eligibility Criteria section for details). If a department is eligible, the Budget Manager may submit the inactivation request through an approval workflow.

Security and Workflow. Only Budget Managers of a given department may verify eligibility and submit that department for inactivation.

The Dean, Director, Department Head, or Chair (DDDHC) associated with the department must approve the inactivation before the final reviews/approvals by central office approvers in Research, Human Resources, Controller's Office, and Budget Office. Once all approvals have been made, the department will become inactivated.

Effective Date. Departments will be inactivated with an effective date of when the inactivation request was fully approved.

Eligibility Criteria. A department must meet all the requirements to be eligible for inactivation. Those criteria are listed below.

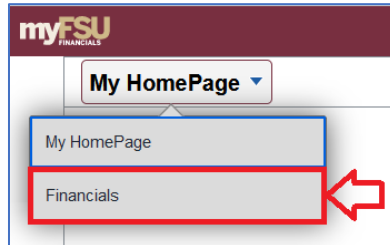
1. No open/active project.
2. No ledger balances for the previous two (2) fiscal years.
3. No capital assets.
4. No non-capital assets.
5. No capital projects.
6. No pending requisitions.
7. No open purchase orders.
8. No unposted vouchers.
9. No purchasing card (PCard) holders.
10. No pending PCard transactions.
11. No posted or unposted budget journals in the current fiscal year.
12. No pending/approved Travel Requests or pending Expense Reports in Concur. (NOTE: This criterion is verified separately from the eligibility verification process within Financials.)

Reactivation. If reactivation is required, please get in touch with the Budget Office (budget@fsu.edu).

Repurposing. Repurposing, or "recycling," departments is not allowed. If a new department is needed, please submit the "Establish a New Department ID" form accordingly.

Navigation

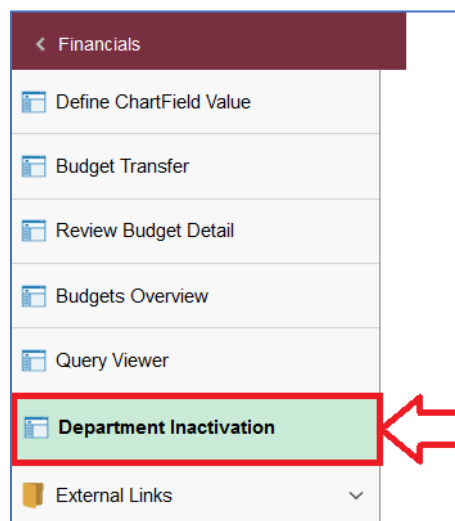
Login to Financials via the myFSU portal, and select the “Financials” page from the dropdown:



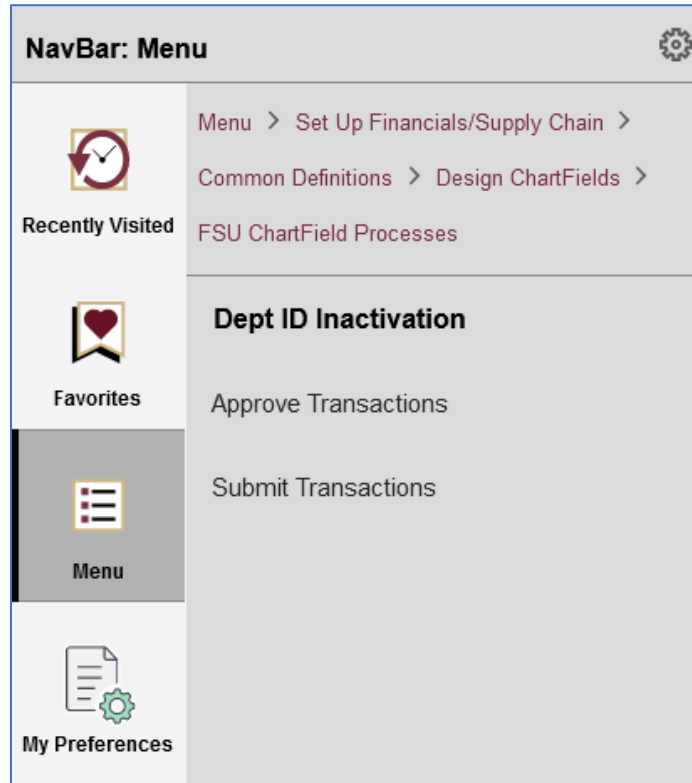
Select the “Budget Management” tile:



And then select the “Department Inactivation” link on the navigation pane on the left-hand side of the screen:



The NavBar navigation within Financials is as follows: Menu > Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > FSU ChartField Processes > Dept ID Inactivation.

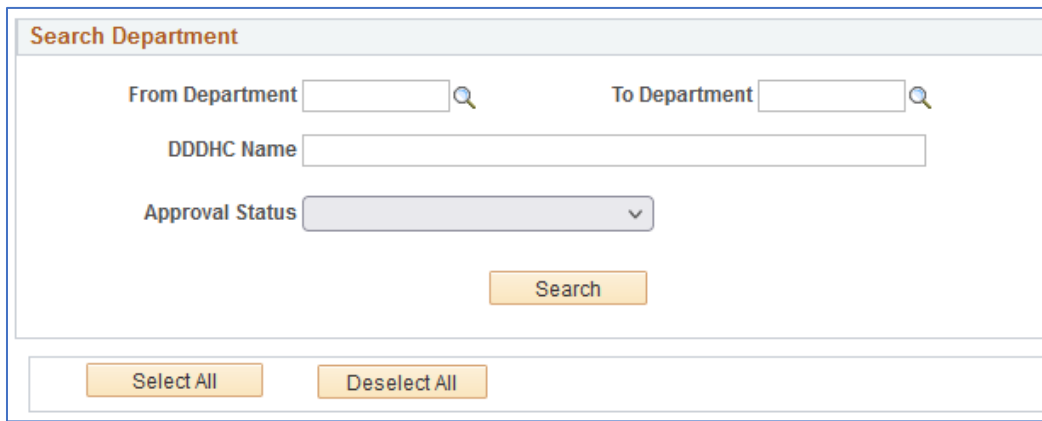


Submitting a Department for Inactivation

To begin, navigate to the “Department Inactivation” module within Financials (see the Navigation section for navigation assistance).

Department Inactivation. As a Budget Manager, you may submit only your departments for inactivation. Select the “Department Inactivation” module to do so.

Search Departments. Use the “Search Departments” box to search for a particular department, a range of departments, a department based on who the DDDHC is, or based on the Approval Status. Click the “Search” button to see all departments that meet the search criteria.

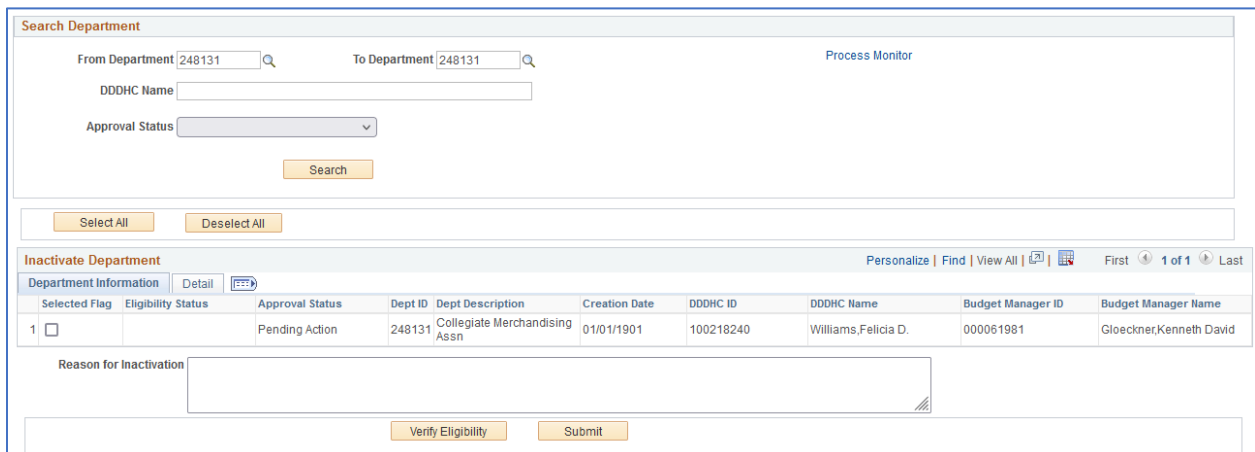


The screenshot shows a search interface titled "Search Department". It includes the following fields and controls:

- From Department:** A text input field with a magnifying glass icon.
- To Department:** A text input field with a magnifying glass icon.
- DDDHC Name:** A text input field.
- Approval Status:** A dropdown menu.
- Search:** A yellow button.
- Select All:** A yellow button.
- Deselect All:** A yellow button.

Approval Status. There are seven (7) approval statuses: (1) Approved, (2) Denied, (3) Pending Action, (4) Submission Process Requested, (5) Submitted for Approval, (6) Verification Completed, and (7) Verification Requested.

All departments have a default status of “Pending Action.” Below is a screenshot of a department not yet verified or submitted for inactivation.

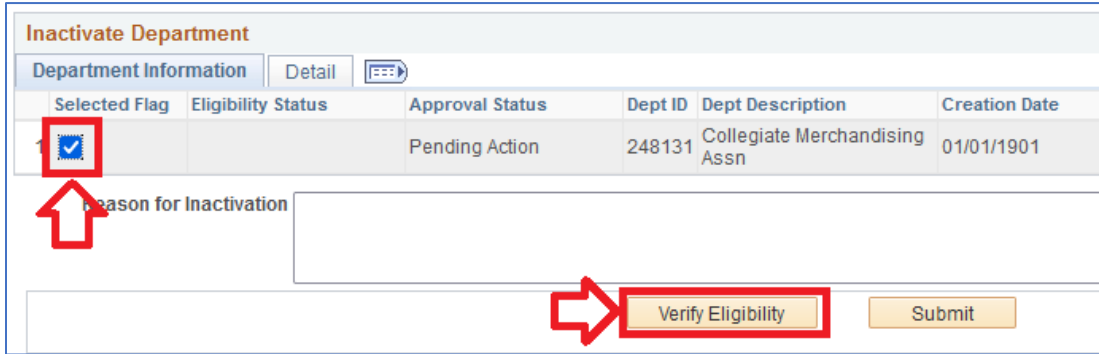


The screenshot shows the "Inactivate Department" form. It includes the following elements:

- Search Department:** A search box with "From Department" and "To Department" fields set to "248131", a "DDDHC Name" field, and an "Approval Status" dropdown. A "Search" button is present.
- Process Monitor:** A link in the top right corner.
- Select All / Deselect All:** Two yellow buttons.
- Table:** A table with columns: Selected Flag, Eligibility Status, Approval Status, Dept ID, Dept Description, Creation Date, DDDHC ID, DDDHC Name, Budget Manager ID, and Budget Manager Name. The table contains one row with the following data:

Selected Flag	Eligibility Status	Approval Status	Dept ID	Dept Description	Creation Date	DDDHC ID	DDDHC Name	Budget Manager ID	Budget Manager Name
1	<input type="checkbox"/>	Pending Action	248131	Collegiate Merchandising Assn	01/01/1901	100218240	Williams,Felicia D.	000061981	Gloeckner,Kenneth David
- Reason for Inactivation:** A text area for providing details.
- Buttons:** "Verify Eligibility" and "Submit" buttons.

Verify Eligibility. Select the department(s) you wish to verify eligibility for in the “Inactivate Department” section and click the “Verify Eligibility” button. You do not need to enter a reason for inactivation to verify eligibility.

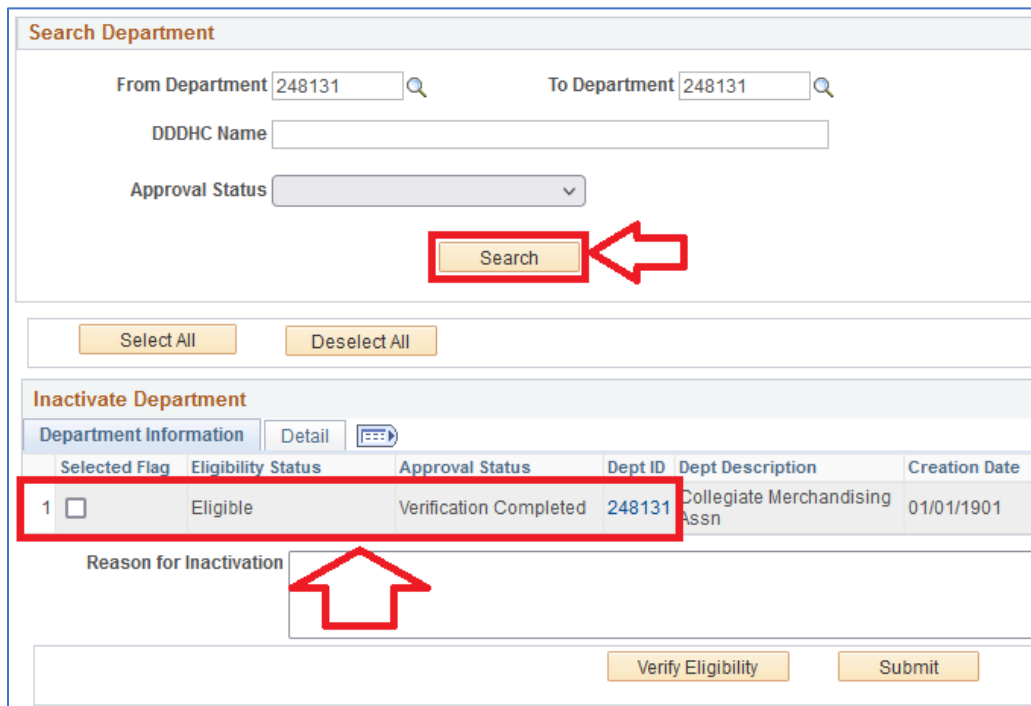


The screenshot shows the 'Inactivate Department' interface. At the top, there are tabs for 'Department Information' and 'Detail'. Below the tabs is a table with the following columns: Selected Flag, Eligibility Status, Approval Status, Dept ID, Dept Description, and Creation Date. The first row of the table is highlighted with a red box around the 'Selected Flag' column, which contains a checked checkbox. A red arrow points to this checkbox. Below the table is a text input field labeled 'Reason for Inactivation'. At the bottom right, there are two buttons: 'Verify Eligibility' and 'Submit'. A red arrow points to the 'Verify Eligibility' button.

Selected Flag	Eligibility Status	Approval Status	Dept ID	Dept Description	Creation Date
<input checked="" type="checkbox"/>		Pending Action	248131	Collegiate Merchandising Assn	01/01/1901

The verification process may take a few moments to complete. It will take longer to complete when multiple departments are being verified for eligibility. To check the verification progress, you may do so with the Process Monitor link in the “Search Departments” box at the top.

Once the verification process has been completed, click the “Search” button again to refresh the results. The department’s eligibility status will be listed accordingly. In the example below, the department is eligible for inactivation and may be submitted for inactivation.



The screenshot shows the 'Search Department' interface. At the top, there are search filters for 'From Department' and 'To Department', both set to '248131'. Below these are fields for 'DDDHC Name' and 'Approval Status'. A red box highlights the 'Search' button, with a red arrow pointing to it. Below the search filters are 'Select All' and 'Deselect All' buttons. Below these is the 'Inactivate Department' section, which is identical to the one in the first screenshot. The table in this section shows the same department, but the 'Selected Flag' is now unchecked and the 'Eligibility Status' is 'Eligible'. A red box highlights the entire row of the table, and a red arrow points to the 'Reason for Inactivation' field below it. The 'Verify Eligibility' and 'Submit' buttons are still present at the bottom.

Selected Flag	Eligibility Status	Approval Status	Dept ID	Dept Description	Creation Date
<input type="checkbox"/>	Eligible	Verification Completed	248131	Collegiate Merchandising Assn	01/01/1901

Submit. To submit the department(s) for inactivation, please enter a reason for the inactivation and click the “Submit” button. Once submitted, the department will proceed through an approval workflow. Please see the Security and Workflow section for more details.

Inactivate Department

Department Information | Detail

Selected Flag	Eligibility Status	Approval Status	Dept ID	Dept Description	Creation Date
<input checked="" type="checkbox"/>	Eligible	Verification Completed	248131	Collegiate Merchandising Assn	01/01/1901

Reason for Inactivation: Student group no longer exists. Department needs to be inactivated accordingly.

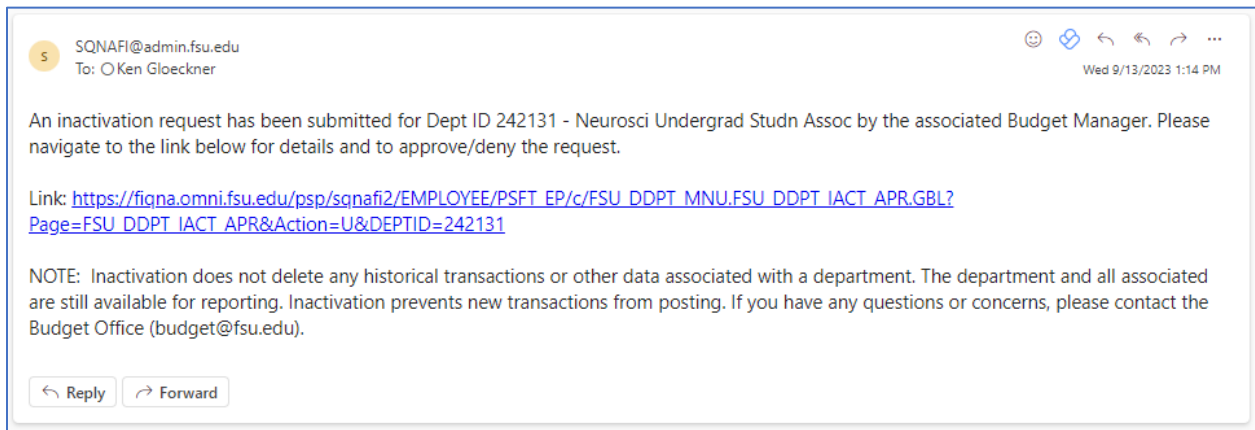
Verify Eligibility | Submit

Approving a Department for Inactivation

As a DDDHC, you may approve or deny any departments submitted for inactivation. Please remember prior to approval workflow, the department has been determined to be eligible for inactivation (see the Eligibility Criteria section for more details).

NOTE: Verifying that no pending/approved Travel Requests or pending Expense Reports in Concur is done manually outside of Financials. The Budget Office will verify this criterion before the final approval.

Email Notification. You should receive an automated email with a link to the inactivation request. The link will take you directly to the approval workflow page for the department inactivation request.



If you wish to navigate through Financials to find all outstanding inactivation requests, please see the following section.

Find an Inactivation Request. To begin, navigate to the “Approve Transactions” module within Financials (see the Navigation section for navigation assistance).

Click the “Search” button to see the departments available for approval. If more than one department is available for approval, they will be listed below. Otherwise, you will be taken directly to the department awaiting approval.

Approve Transactions


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

[Find an Existing Value](#)

▼ **Search Criteria**

Search by: begins with

Search [Advanced Search](#)



Review Information. The top section of the Approve Department Inactivation page provides information about the department (Department ID, Name, DDDHC, Budget Manager, Purpose, etc.) and the reason for the inactivation request.

Approve Department Inactivation

Request to Inactivate Department ID(s) Summary for Financials Application

General Information

Department	248253	Natl Art Education Assn
DDDHC	000012345	Sammy Seminole
Budget Manager	000054321	Gary Garnett
Creation Date	01/01/1901	Request Date/time 08/18/2023 11:43AM
		Last Update Timestamp 08/18/2023 11:43AM

Department Purpose

Inactivation Request Notes

Approve or Deny Inactivation Request. The bottom of the screen has Approve and Deny buttons as well as the approval workflow steps and each approver. Enter an approver comment (optional) and click either the Approve or Deny button.

Important Information

Please note that inactivation does not delete any historical transactions or other data associated with a department. The department and all associated are still available for reporting. Inactivation prevents new transactions from posting.

Approver Comments

Approve

Deny

Department Inactivation Stage



Once the inactivation request has been fully approved, the department will become inactivated effective the date as the final approval.