Run the COA Report

1. Click the **CAL Components** link.

2. Click the **GL** link.

3. Click the **COA Inactivation Report** link.

4. The **COA Inactivation Report** page is displayed. You have the option to run the report by a **single Business Unit Value** or by **All Business Units**.

   Click the **Business Unit Option** list.

5. In this example we will run the report by a single **Value** option.

   Click the **Value** list item.

6. Next we need to select specific **Business Unit Value**.

   Click the **Look up Business Unit (Alt+5)** button.

7. The Look Up Business Unit page is displayed. In our example the **Business Unit** for **UC Berkeley** is selected.

   Click the **10000** link.

8. Select the **Type** of value you wish to search for under the Business Unit.

   Click the **Type** list.

9. The **Drop Down** list of types available for selection is displayed. In this example the type selected is **DeptId**.

   Click the **DeptId** list item.
10. **Note:** Enter a specific value in the COA Value field. The field does not accept wild cards e.g., % or a partial value. There are no prompts for this field.

   Click in the *Value* field.

11. In this example the following **DeptID** is entered.

   Enter the desired information into the *Value* field. Enter a valid value e.g. "12130".

12. To start the search query in **BFS**

    Click the **Find** button.

13. The **search results** for the criteria entered are displayed. Close the left hand menu to view more of the page in the **BFS** application window.

    Click the **Collapse (Ctrl+Y) Menu** button.

14. The search results for the criteria entered in our example, **Type:** DeptID and **Value:** 12130 are displayed.

    Note that the results are displayed in an excel type grid as in other search result pages in **BFS** for review.

15. As with other pages in **BFS** the order of the search results can be sorted by the column headings. In this example the results are sorted by the **Trans Type** in descending order.

    Click the **Trans Type** column header.

16. Note that the data displayed for the column and associated rows are now in ascending order. The **Trans Type** of Voucher is now displayed at the top of the column order.

    Click the **Trans Type** column header.

17. Clicking the column header again will return the data displayed on the page to ascending order by **Trans Type**.

    Use the **Scroll Bar** at the bottom of the page to scroll to the right. Just as with other pages in **BFS** there is functionality available to help you manage your search results.

    Press the left mouse button on the scrollbar box and drag it to desired position.
18. Additional functionality for your search results is displayed in the search results header that include the following:

- **Customize**: allows you to customize the column order of the search results displayed. Please see "Customize the Worklist" Quick Reference Guide for detailed instruction.
- **Find**: allows you to search for specific data in the search results.
- **Download Icon**: allow you to extract your search results to Excel.
- **Show Buttons**: allows you to page through your search results.

Use the **Scroll Bar** at the bottom of the page to scroll to the **left**. Press the left mouse button and drag the mouse to the desired location.

19. The **Include all DeptID Activity** check box becomes active only when a **Type** of **Org Node** is selected for the report. Select the drop down list box from the **Type** field.

Click the **Org Node** list item.

20. Note that the **Include all DeptID Activity** checkbox is now available. We will **not** check the box at this point so that you will be able to compare the search results before and after the box is selected for the Org Node.

In our example the following information is entered for the **Org Node**.

Enter the desired information into the **Value** field. Enter a valid value e.g. "IMMCB".

21. Click the **Find** button.

22. The **Search Results** for the **Org Node** are returned.

Use the **Scroll Bar** at the bottom of the page to **scroll to the right** to view the number of records returned.

Press the left mouse button and drag the mouse to the desired location.

23. Note that in this example there are **443** rows of data returned for Org Node **IMMCB**.

24. To include all departments that roll up to the **Org Node** the check box for **Include all DeptID Activity** must be selected.

Click the **Include all DeptID Activity** option.

25. Click the **Find** button.
26. The **Search Results** for the **Org Node** with all **DeptIDs** that roll up to the **Org Node** is displayed.

Use the **Scroll Bar** at the bottom of the page to **scroll to the right** and view the number of rows returned when all **DeptIDs** are included for the **Org Node**.

Press the left mouse button and drag the mouse to the desired location.

27. Note that in this example when the **Include All DeptID Activity** check box selected is selected there are now **3136** rows records returned for **Org Node IMMCB**. You can scroll through the records to identify which ones to address first.

28. This completes the exercise. Please refer back to this material as needed for assistance.

**End of Procedure.**