

Message

From: Gail Feliciant [/O=IMO/OU=EXTERNAL
(FYDIBOHF25SPDLT)/CN=RECIPIENTS/CN=99D87C22A655496FBC2C643081C82E81]
Sent: 2017-03-14 11:16:06 AM
To: Susan Nicholson [/O=IMO/OU=MSX1/cn=Recipients/cn=Susan Nicholson]
Subject: RE: Change Chart of Accounts in Lawson

 Kathy Sandberg: Hi, my name is Kathy Sandberg and I will be working with you on your chat request today.

 Gail Feliciant: is it possible to change existing Summary Accounts and Accounts in Lawson.

For example: we would like to change the following on the Balance Sheet:

DEFERAST Deferred Assets change to REGASSET Regulated Assets
28010 Deferred Costs – SMP change to 28010 Unrecovered smart metering expenses
28020 Deferred Debt change to 28020 Unrecovered PSAB transition items

 Kathy Sandberg: Hi Gail

 Kathy Sandberg: You want to change the descriptions?

 Gail Feliciant: hi yes please.

 Gail Feliciant: we tried change but it's not allowing

 Kathy Sandberg: let me check on that procedure for you I'll get back to you shortly

 Gail Feliciant: thank you

 Kathy Sandberg: It is not possible to change or edit the name of an Accounting Unit. The description can be changed, but not the name itself.

If the Accounting Unit must have a different name, you will need to add a new AU with the proper name and move the subordinate posting accounting units to it. You can then delete the incorrect AU using GL20. You will then need to move the existing transaction data from the old AU to the new AU using Level Reorganization (GL120).

 Kathy Sandberg: Gail I found additional information

 Kathy Sandberg: hang on

 Gail Feliciant: ok

 Kathy Sandberg: that was an OLD KB here's newer information: The name of the summary account can be changed using the Rename Summary Account (GL00.8) program. This form is accessed from the Summary Account's More button, which is found on GL00.1. From the Summary Account Options (GL00.5) screen, select the Rename button on the Main tab. Enter the new name and select the checkmark to process.

 Kathy Sandberg: see if that works for you

 Gail Feliciant: is that on v 10.0.07?

 Kathy Sandberg: I'm checking now

 Gail Feliciant: I will try that first

 Kathy Sandberg: Yes

 Kathy Sandberg: on GL00 select the MORE button for the summary

 Kathy Sandberg: there is another button called RENAME

 Gail Feliciant: awesome = thank you so much :)

 Kathy Sandberg: your welcome

Thank you,
Gail

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From: Susan Nicholson
Sent: March 13, 2017 11:13 AM
To: Gail Feliciant; Chad MacMillan
Cc: Bill Hipple; Anne Freer; Natalie Schaus; Susan Nicholson
Subject: Change Chart of Accounts in Lawson

Hi Gail, can you please find out if it is possible to change existing Summary Accounts and Accounts in Lawson.

For example: if I would like to change the following on the Balance Sheet:

DEFERAST Deferred Assets	change to	REGASSET Regulated Assets
28010 Deferred Costs – SMP	change to	28010 Unrecovered smart metering expenses
28020 Deferred Debt	change to	28020 Unrecovered PSAB transition items

Please DO NOT make these changes in Lawson, I just want to know the process and if we can do this.

Thanks, Susan

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