Procedure for Identifying Unused Index Codes Using Web Intelligence

Organization Index (OI) and Program Index (PI) records that have not been used in the current biennium (19) and are not needed in the current (19) or ensuing (21) biennium should be deleted in the current biennium, prior to the AFRS Table Roll process which occurs in April 2019. This will prevent unneeded records from automatically rolling forward to the ensuing biennium in the AFRS Table Roll process. This procedure explains how to identify the index codes your agency has not used. It assumes the user has access to, and basic understanding of, the Web Intelligence (Webi) application.

1. Log into Webi and click on the "New" (Create a Web Intelligence document) icon.

2. On the 'Select a data source' menu, click on "**Universe**" and click "OK."

3. On the 'Select a universe for the query' menu, click on "**AFRS Titles**" and click "Select."

4. On the 'Query Panel' click the plus sign (+) next to PI Program Index (or OI Organization Index) to see the field options. Double click the elements you want to include in the output. As you double click, the element will display in the 'Result Objects' section.

> **NOTE: If you plan to use the AFRS Automated Table Upload process to update or delete records identified in this process, it is recommended that you download <u>all fields</u> by dragging the entire PI or OI folder to the 'Result Objects' section. This will enable you to copy and paste records to the table upload template.**

If you will not be using the AFRS Automated Table Upload process, the recommended <u>minimum</u> fields are:

- Biennium
- Agency
- Program Index (or Organization Index)
- Title
- Program Index Used Indicator (or Organization Index Used Indicator)
- Last Process Date

Larger agencies may want to select additional fields to help in the analysis of which PI/OI records may need to be deleted. For example, the query could include program and sub-program for PI (division and branch for OI), so the responsible section of the agency can make the determination as to whether a code is needed or not.

Another field that may prove useful, if used by your agency, is the 'Program Index Restrictor' field. This one-character field can be set to I=Inactive, A=Allowed for Allotments only, or blank=active and allowed for all transactions. (There is not a similar field for the OI.)

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5. Drag the fields you wish to use as filters, to the 'Query Filter' section of the query panel. At a minimum, use Biennium and Agency for the filters. In the Biennium, enter or select the current biennium (2019). In the Agency filter, enter or select your agency number (for example, 105).

   To limit the output to only those records that have <u>not been used</u> in the current biennium, drag the Program (Organization) Index Used Indicator to the 'Query Filter' section. Click the down arrow to change the operator from 'in list' to 'not in list' and type the letter Y in the box. Y=Yes, this record has been used, so limiting the output to records that do not equal Y will give you only the unused records.

6. Click on "Run Query." The records that meet your filter criteria will be displayed.

7. Save the file to Excel by clicking the down arrow next to the 'Save' icon (on the File tab). Choose 'Save as' and navigate to the location where you want to save the file on your network or desktop. Enter the file name and click 'Save.'

8. Open the file in Excel. Determine which records should be deleted and which should be retained. [NOTE: It is up to the agency to decide on criteria to use to make this determination.] Use your normal agency process (i.e., forms, approvals, etc.) for deleting table records in AFRS and then delete online or using the table upload process.

   Note that it is not necessary to delete the underlying descriptor tables (D16-D20 for Program Index and D02-D06 for Organization Index). If an index code (PI or OI) is deleted, the table roll process will automatically eliminate the related descriptor tables.