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## Restructure Current Ledger and/or Fund Hierarchy

- **Product:** Voyager
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### Question

In new fiscal year, need to have a ledger with a different fund structure. How to restructure the current ledger and/or fund hierarchy? Can existing ledger be rolled over into new ledger structure?

### Answer

Existing ledgers can only be rolled over to new versions of those ledger structures in the next fiscal period. Before or after rollover (or without doing a rollover at all), you can set up your new ledger and fund structure, and then edit line items associated with the older fund structure to associate them with a fund in the new ledger:

1. Create new funds and/or ledger
2. Bring up every PO and Invoice linked to old fund(s)
3. Update funds on line items
  1. For pending POs: Highlight Line Item > Detailed Line Item > Copies and Funds
  2. For approved POs: Highlight Line item > Line Item menu > Edit Approved
4. Set fund to fund in new ledger structure.

### Additional Information

Each fund is tied to a fund id and has a parent fund id in the database.

If the structure of the ledger needs to be changed, create a new fund rather than just renaming it. The old fund is attached to the line items in the database and the link cannot be broken. Therefore, the line items must be moved from the old fund to the new one.

Ex Libris recommends testing the procedure on a sandbox or traindb in order to see how it works and decide if the change should be made to production data.

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