

## Financials 9.1

# Chartfield Request System

The Chartfield Request System was created to make it easier for you to submit requests to create new chartfields and modify existing ones. Instead of having to remember which paper forms to mail to which central offices with which signatures, it will allow you to create and submit an electronic request from within the Financials system and have it route automatically for all the correct approvals and then to the correct central office for processing.

The Chartfield Request System will allow you to submit electronic requests for new Department IDs, modifications to existing Department IDs, and Department ID inactivations. You will be able to submit electronic requests for new Project Segments for any of the following fund sources: State Appropriated, F&A, Grants, Foundations, University Endowments, Auxiliary Sales & Service, Agency, Debt, and Gifts/Loans. You will also be able to submit requests to modify or inactivate existing Project Segments for those same fund sources.

Navigation: **Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request**

## Add a New Request

The screenshot shows the MyPack Portal interface for adding a new chartfield request. The page title is "Chartfield Request" and the URL is "https://shbdv.acs.ncsu.edu/psp/EP911TRN/EMPLOYEE/PP09101TRN/c/NC\_REQUEST\_NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOURNALS\_PROJECTS\_NC\_REQUEST\_GBL". The page header includes "NORTH CAROLINA STATE UNIVERSITY" and "MYPACK PORTAL FOR FACULTY & STAFF". The breadcrumb trail is "History > Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request".

The "CF Request System" section contains a navigation bar with "Find an Existing Value" and "Add a New Value" (highlighted with a red circle). Below this is a form with the following fields:

- Business Unit: NCSU1
- CF Request ID: NEXT
- CF Request Date: 02/21/2012
- CF Request Type: Segment
- CF Request Action: Add
- CF Request Fund Group: (blank)

There are three dropdown menus with callout boxes:

- Department Segment:** A dropdown menu.
- Add Inactivate Modify:** A dropdown menu with three options.
- Fund Group:** A dropdown menu with the following options: 15030 - Academic Affairs, 15031 - Agricultural Research, 15032 - Cooperative Extension Agency Funds, Auxiliary Sales and Service, Contracts and Grants, Debt Service, F and A Receipts, Foundations, Foundations - Other, Gifts and Loan Funds, University Endowments.

An "Add" button is located below the form. At the bottom of the page, there is a "Done" status and a "100%" zoom level.

When adding a new chartfield request, you will have three menu selections to make...

- 1) Type: Specify whether the request will be for a project segment or a department ID.
- 2) Action: Specify whether you are requesting an existing value be modified or inactivated, or a new value be added.
- 3) Fund Group: Specify the type of funding associated with the existing or new project segment – leave the Fund Group blank for department ID requests.

**Note:** A project segment is the first 6 digits of a project number. It precedes the 5 digit phase. The Chartfield Request System is not for adding or maintaining phases. Separate campus security access is needed to directly add or update project phases via the Project Maintenance page.

## Add a Request for a New Department ID

The screenshot shows the 'Chartfield Request' form in the MyPack Portal. The form is titled 'Chartfield Request' and is part of the 'Financial Systems > Journals & Chartfield Maint.' section. The form includes the following fields and options:

- Unit: NCSU1
- CF Request ID: NEXT
- CF Request Date: 12/03/2012
- CF Request Type: Department
- Action Type: Add
- Proposed ID:
- Effective Date: 12/03/2012
- Request Justification and Modification Details:
- Short Description:
- Long Description:

At the bottom of the form, there is a 'Requestor:' field and a 'Date/Time:' field. A 'Save' button is highlighted with a callout box. Other buttons include 'Add', 'Update/Display', 'Print', 'Chartfield Inquiry', 'Delete', and 'Dept Naming Guidelines'.

**You may save a request at any time. Most required fields do not need to be populated until the Submit button is clicked. Saving before submitting guarantees your entries have been committed to the database.**

**All five fields on this page are required.**

**You must put at least the first 2 digits of the new department ID as the proposed ID. This is very important for routing the request to the correct department approver.**

**Click on the Dept Naming Guidelines link for guidance on what to use for the department's long description.**

**The justification is where you specify the business need for creating the new department ID and any other information your Budget Analyst may need.**

**The short description is 30 characters and should be a condensed version of the long description.**

**The long description field has room for 60 characters.**

## Add a Comment to a Request

Chartfield Request - Microsoft Internet Explorer Provided by Enterprise Technology Services & Support

https://ehbdr.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/FF0910TRN/NC\_REQUEST\_NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOURNALS\_PROJECTS.NC\_REQUEST\_GBL

NORTH CAROLINA STATE UNIVERSITY  
**MYPACK PORTAL**  
MYPACK HOME FOR FACULTY & STAFF

EPTRN

History Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Header Approval **Comments**

Unit: NCSU1 CF Request ID: 0000000001 CF Request Date: 02/21/2012  
CF Request Type: Department Action Type: Add

Comments (up to 254 characters per comment)

Entered by: 1

+

Save Return to Search Notify Add Update/Display

Done Internet 100%

Comments may be added at any point during the request/approval process.

Click the plus to add a new comment if one already exists. Clicking the minus deletes the comment, but only the user who created the comment can delete it.

Save your comments to make them part of the request.

Saving a new comment does not affect the routing of a request that has already been submitted.

Approvers are encouraged to use comments as well.

Your user ID and a date/time stamp will be included just above each of your comments.

## Submit a Request for Approval

Click Submit to route the request for the next approval. (You should save the request before clicking Submit.)

The next approval step after the originator is the department approver. He or she will receive an email letting them know there is a new item on his or her workload.

After submitting, a graphic showing the approval routing will be displayed. It shows the approvals needed and the status of those approvals.

**Note:** Department approval routings are based on the first two digits of the proposed department ID. You are not limited to which digits you key, so please be aware that the request will route for appropriate approval.

For example, putting '123456' in the proposed ID field will route to the College of Design for approval – please do not do this unless you work in the College of Design.

## Add a Request to Modify an Existing Department ID

Chartfield Request - Windows Internet Explorer

https://shibdv.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/PFO910TRN/c/NC\_REQUEST.NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOURNALS\_PROJECTS.NC

NORTH CAROLINA STATE UNIVERSITY

**MYPACK PORTAL** EPTRN

MyLinks: [ ] [ ]

MYPACK HOME FOR FACULTY & STAFF Arlene's Tab

History Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Header Approval Comments

Unit: NCSU1 CF Request ID: NEXT CF Request Date: 12/03/2012

CF Request Type: Department Action Type: Modify

CF Request Status: New Request Project/Department: [ ] Print Chartfield Inquiry

Effective Date: 12/03/2012 Delete Dept Naming Guidelines

Request Justification and Modification Details: [ ] Attachments (0)

Requestor: Date/Time:

Save Notify Add Update/Display

Done Internet | Protected Mode: On 100%

Put the ID number of the existing department you need modified.

If you are requesting that a department ID's long and/or short description be changed, simply include the exact wording with the justification and modification details.

The only other possible request for this page is for a department ID to be reactivated after it has been inactivated. Please understand that there are strict limitations on re-using inactive department IDs.

## Add a Request to Inactivate an Existing Department ID

**Chartfield Request - Windows Internet Explorer**

https://shibd.v.acs.ncsu.edu/psp/EP91PRE/EMPLOYEE/PFO910PRE/c/NC\_REQUEST.NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOURNALS\_PROJECTS.NC\_

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MyLinks: [ ]

**MYPACK HOME FOR FACULTY & STAFF Arlene's Tab**

History | Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Header | Approval | Comments

Unit: NCSU1 CF Request ID: NEXT CF Request Date: 12/04/2012

CF Request Type: Department Action Type: Inactivate

CF Request Status: New Request Project/Department: [ ]

Effective Date: 12/04/2012

Request Justification and Modification Details: [ ]

Print | Chartfield Inquiry | **Dept Inactivation Checklist**

Delete | Attachments (0)

Check here to confirm that the most recent Department Inactivation Checklist has been completed and either attached to this request or forwarded to the University Budget Office.

Requestor: [ ] Date/Time: [ ]

Save | Notify | Add | Update/Display

http://www.lib.ncsu.edu/ Internet | Protected Mode: On 100%

Inactivating a department ID requires a completed Department ID Inactivation Checklist. You may download this document directly from the link on this page or from the Budget Office homepage.

You may attach a scan of the completed inactivation checklist to this request to meet this requirement.

You must check this box to submit the request. It is very important that all items on the Department ID Inactivation Checklist are completed prior to submitting a request for a department ID inactivation.

## Add a Request for a New Project Segment

Chartfield Request - Windows Internet Explorer  
 https://shibd.v.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/PF0910TRN/c/NC\_REQUEST.NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOU

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MYPACK HOME FOR FACULTY & STAFF Arlene's Tab

History Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Header Approval Comments

Unit: NCSU1 CF Request ID: 000000045 CF Request Date: 12/03/2012  
 CF Request Type: Segment Action Type: Add Funding Type: 16030 - Academic Affairs

CF Request Status: New Request Proposed ID: 201977  
 Effective Date: 12/03/2012 Project Reference: 015160  
 Check for new Project Reference

Request Justification:  
 Type your justification and background information here.

Short Description:  
 Type descr up to 30 char here

Long Description:  
 Type a description up to 60 characters long here.

Reportable as Auxiliary, Center/Institute? No If Yes, please specify name of Auxiliary, Center/Institute:  
Auxiliary Code/Type below not applicable for Foundations/University Endowments requests

Auxiliary Code: Auxiliary Type:  
 \*Fund Code: 16030 \*Department: 100101 Program: Class:

List the Name or Title of the Primary Responsible Person on the first row and insert additional rows for other authorized persons.

Responsible/Authorized Persons		
Name	Title	Department
	Athletic Director	

Requestor: ACMABRY Date/Time: 12/03/12 2:18:05.000000PM

Save Notify

javascript:saveWarning("TargetContent",null,"top","https://shibd.v.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/EMPL/?cmd=logout")

The proposed project segment ID is not required. You may provide an example of what you want it to be or even just a portion of it – 201xxx.

Project Reference is one of the required fields on this page. For all 16030 requests it needs to be **015160**, and for all F&A requests it needs to be **015260**. (16031 and 16032 requests vary.) Note: There will never be a reason to check the new Project Reference box for State or F&A funds.

Please specify if you know that the new project segment will be used as part of a Budget Office reviewed auxiliary unit or a Center/Institute (as defined by the Office of Research & Innovation). It's not required, but you may include the Auxiliary Code if you know it.

Department selections are limited to only those you have security for. You are required to assign an existing six digit department ID to the new project segment.

Program and Class are not required. (See the table on the Helpful Hints page for information on matching the proposed project segment with program and class in 16030 and F&A.)

For 16030, 16031, 16032, and F&A, please use only the Title field for the Responsible Person. This should not be a person's name. It should be a job title that does not need to be updated with employee turnover, such as, "Director" or "Dept Head".



## Department Approver's Work List

Worklist for BMARMWOO: Beverly M Armwood

Funding Source Filter:  Worklist Filter: **CF Request Department Appr**

From	Routed	Work Item	Link	Funding Source	Dept ID	Project ID	Sponsor	Priority
Arlene C Mabry	12/04/2012 9:11:36AM	CF Request Department Approval	<a href="#">CF ID: 0000000509</a> <a href="#">CF Date: 2012-12-04</a> <a href="#">Type: Department</a>		100177			2-Medium <input type="button" value="Mark Worked"/>
Arlene C Mabry	12/04/2012 9:13:33AM	CF Request Department Approval	<a href="#">CF ID: 0000000510</a> <a href="#">CF Date: 2012-12-04</a> <a href="#">Type: Segment</a>	Acad Aff	100101	201977		2-Medium <input type="button" value="Mark Worked"/>

### Chartfield Request

A Chartfield Request has been entered that requires your attention.  
Access the [Chartfield Request](#) to view details and process this request.

**Header Details**

Chartfield Request ID: 0000000621  
 Chartfield Request Date: 11/28/2012  
 Chartfield Request Type: Segment  
 Chartfield Request Action: Add  
 Funding Source: Acad Aff  
 Proposed ID: 301532  
 Request Justification: For the collection of receipts and the payment of expenditures for the PCOM Study Abroad Program  
 Originator: Arnette H Ejire  
 Fdn/End Primary Fund:  
 C&G Fiscal Manager:

The department approver will receive an email notification and the request will be available on his or her worklist.

You can set up a filter in Gmail to help you manage these emails. For instance, you could filter on key words from the subject, then have them skip the inbox and apply a specific label.

If your college has different approvers for different funding types, this is where the department approver should take note of the funding type in the email.

## Department Approver's Review/Update

Chartfield Request - Windows Internet Explorer  
https://shibdv.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/PFO910TRN/c/NC\_REQUEST.NC\_REQUEST.GBL?FolderPath=PORTAL\_ROOT\_OBJECT.NC000126.NCF\_CAMPUS\_JOURNALS\_PROJECTS.NC

NORTH CAROLINA STATE UNIVERSITY  
**MYPACK PORTAL** **EPTRN**  
MYPACK HOME FOR FACULTY & STAFF Arlene's Tab

History | Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Header | Approval | Comments

Unit: NCSU1      CF Request ID: 0000000045      CF Request Date: 12/03/2012  
CF Request Type: Segment      Action Type: Add      **Funding Type: 16030 - Academic Affairs**

CF Request Status: New Request      Proposed ID: 201977      Print      Chartfield Inquiry  
Effective Date: 12/03/2012      Project Reference: 015160      Delete  
 Check for new Project Reference      Attachments (0)

Request Justification:  
Type your justification and background information here.

Short Description: Type descr up to 30 char here  
Long Description: Type a description up to 60 characters long here.

Reportable as Auxiliary, Center/Institute? No      If Yes, please specify name of Auxiliary, Center/Institute:  
Auxiliary Code/Type below not applicable for Foundations/University Endowments requests

Auxiliary Code:      Auxiliary Type:     

\*Fund Code: 16030      \*Department: 100101      Program:      Class:     

List the Name or Title of the Primary Responsible Person on the first row and insert additional rows for other authorized persons.

Responsible/Authorized Persons		
Name	Title	Department
<input type="text"/>	Athletic Director	<input type="text"/>

Requestor: ACMABRY      Date/Time: 12/03/12 2:18:05.000000PM

Save      Notify      Add      Update/Display

Internet | Protected Mode: On      100%

If your college has different approvers for different funding types, this is where to take note of the funding type in the request before making any changes.

The department approver will be able to make changes to any of the fields on the request.

## Department Approver's Comments

**Worklist - Microsoft Internet Explorer Provided by Enterprise Technology Services & Support**

https://shibdv.acs.ncsu.edu/psp/EP91TRN/EMPLOYEE/PFO910TRN/w/WORKLIST?ICAction=ICViewWorklist&Menu=Worklist&Market=GBL&PanelGroupName=WOR...  
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MYPACK HOME FOR STUDENTS FOR FACULTY & STAFF Beverly

History Main Menu > Financial Systems > Worklist > Worklist

Header Approval **Comments**

Unit: NCSU1 CF Request ID: 0000000022 CF Request Date: 02/23/2012  
CF Request Type: Segment Action Type: Add Funding Type: 16030 - Academic Affairs

Comments (up to 254 characters per comment)

Entered by: Arlene C Mabry 02/23/2012 2:07:25PM  
1 Type comment number one here.

Entered by: Beverly M Armwood 02/23/2012 2:21:24PM  
2 Type comment number two here.

If the department approver made any changes to the request, it would be a good practice to note those changes in the comments. That way the originator will know who changed what.

If the Budget Office approver or processor makes any changes, he or she will make note of them in the comments as well.

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# Department Approver Submits a Request for Central Office Approval and Processing

**Header** | **Approval** | **Comments**

Unit: NCSU1      CF Request ID: 0000000022      CF Request Date: 02/23/2012  
 CF Request Type: Segment      Action Type: Add      Funding Type: 16030 - Academic Affairs

Status: Submitted for Approval  
 Auxiliary Reporting: N

**Approval Status**

Business Unit: NCSU1  
 Approval Check Active: Y  
 Approval Action:   
 Comments for Denial Email:

**CF Request Approval**

**BUSINESS\_UNIT=NCSU1, NC\_CF\_ID=0000000022, NC\_CF\_DT=2012-02-23: Pending**  
 Online,Add,Segment,A0J0  
 Approved: Beverly M. Armwood (CF Request Department Approval) → Pending: Multiple Approvers (CF Request Budget Approval) → Not Routed: Multiple Approvers (CF Request Budget Processor)

**BUSINESS\_UNIT=NCSU1, NC\_CF\_ID=0000000022, NC\_CF\_DT=2012-02-23: Approved**  
 Online,Add,Segment,A0J0  
 Approved: Beverly M. Armwood (CF Request Department Approval) → Approved: Karl D. Wallin (CF Request Budget Approval) → Approved: Jennifer Harris Coltrane (CF Request Budget Processor)

**Chartfield Request**

The following Chartfield Request has been approved and completed.  
 Access the [Chartfield Request](#) to view details.

**Header Details**

Chartfield Request ID: 0000000232  
 Chartfield Request Date: 08/21/2012  
 Chartfield Request Type: Department  
 Chartfield Request Action: Add  
 Funding Source:  
 Proposed ID: 108212  
 Request Justification: PTW TESTING CF EMAIL TEMPLATE CHANGE (DEPT ID)  
 Originator: Arlene C Mabry  
 Fdn/End Primary Fund:  
 C&G Fiscal Manager:

The request's originator will receive an email after the central office has processed or denied the request. There will also be an item on the originator's worklist indicating the updated status of the request.

Helpful Hints:

- You may save a request at any time. Most required fields do not need to be populated until the Submit button is clicked. Saving before submitting guarantees your entries have been committed to the database.
- There is a clickable “Chartfield Inquiry” link on all header tabs in the Chartfield Request System. Use it to determine if your proposed project or department ID already exists and, if so, what attributes or projects are associated with it. Be sure to search for “All Projects”. There are strict limitations on re-using inactive projects and inactive department IDs.
- There is no proxy approver functionality for chartfield requests like there is for other transactions. The first level of approval is based on the two digit department ID specified in each request. The central office level of approval is based on the fund group specified at the start of each request.

Table: Matching Project Segments with Program and Class in 16030 and F&A.

Program Code	Description of Funds	Class:				
		212	39*	23376	23379	262
		State Approp	ETF	Approp Rcpt	Prem Tuit	F&A
101	Regular Term Instruction	201xxx	361xxx	301xxx	301xxx	251xxx
102	Summer Term Instruction	202xxx	-	302xxx	-	252xxx
103	Extension Instruction and Non-Credit Instruction	203xxx	-	303xxx	-	253xxx
106	Veterinary Medicine	204xxx	-	304xxx	304xxx	254xxx
110	Organized Research	207xxx	-	307xxx	-	257xxx
142	Community Services	211xxx	-	311xxx	-	261xxx
151	Libraries	214xxx	-	314xxx	-	264xxx
152	General Academic Support	215xxx	-	315xxx	-	265xxx
160	Student Services	218xxx	-	318xxx	-	268xxx
170	Institutional Support	221xxx	-	321xxx	-	271xxx
180	Physical Plant Operations	224xxx	-	324xxx	-	274xxx
230	Student Financial Aid	227xxx	-	-	327xxx	277xxx

Distance Education is the exception to the table above. All Distance Education projects begin with 205xxx and are in Class 215, regardless of Program Code.

\*Education and Technology Fee (ETF) projects now begin with 361xxx and are in class 39. As such, they are Trust funds administered by the Controller’s Office. They are requested using Fund Group “Auxiliary Sales and Service”.