Add a New ChartField

The purpose of this job aid is to provide instructions to ChartField Request preparers on how to initiate a request in EFS to create a brand new value for any of the following ChartFields: Fund, DeptID, Program, Account, ChartField 1, ChartField 2, and Fin EmplID. Individuals who may serve in this role include journal entry preparers and RRC Managers (or their designees).

1. Upon successful login to EFS, navigate to: Setup Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Request. The Add a New Value subpage will appear.

   Note: Whichever ChartField type (e.g., Program, DeptID) is selected will determine which required data entry fields will appear on the subsequent page because each ChartField has different attributes.

2. In Field Name, click the lookup icon to select which specific ChartField type (e.g., “PROGRAM_CODE”) should be created. Leave all other values as their default. Click <Add>.

   Note: The Request ID, Field Value fields must not be changed from the defaults because once the request is saved and approved, the new values will be assigned in EFS and communicated to the preparer.

3. The ChartField Request page will appear. Verify or complete the header’s following fields:

   • Field Value: “New” (leave at the default).
   • Email ID and Telephone: Defaults with the preparer’s information. Change where appropriate.
   • RRC Approval: Select the RRC initiating the request.
   • Effective Date: Enter the first day of the fiscal year (e.g., “07/01/2014”) in which the value becomes valid into EFS.
   • Status: Select “Active.”
   • Description: High level summary of the new value (limited to 30 characters).
   • Manager Name: Enter the name of the RRC manager.
   • Short Description: Limited to 10 characters.

4. Depending on which ChartField was selected on the Find an Existing Value page, a series of required questions that are relevant to that specific value will appear in the Request Comments section. Enter an appropriate response in each question’s Answer field.
Add a New ChartField (cont.)

5. After all questions have been answered, scroll to the bottom left of the page and click <Save>.

6. Once saved, a unique request ID number will be assigned.

7. The Request Action drop-down menu will appear at the bottom of the page. Select “Submit for Approval,” then click <Go>. Until this action is completed, the request will not route for approval.

8. The request will route to the RRC manager (or designee) for approval. In addition, DeptID requests will route to the Office of Budget and Finance, and non-DeptID requests will route to Accounting Services for approval. The preparer will be notified via email whether the request is approved and will be communicated the new numerical value.