



**State of Wisconsin
Department of Administration**

**ChartField Submission Request
Job Aid**

Version 1.0



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PURPOSE AND DESCRIPTION

Purpose

This document explains the key activities involved in ChartField Submission Request. It provides an overview of the sub-processes involved, as well as step-by-step procedural guidance to perform the activity.

Description

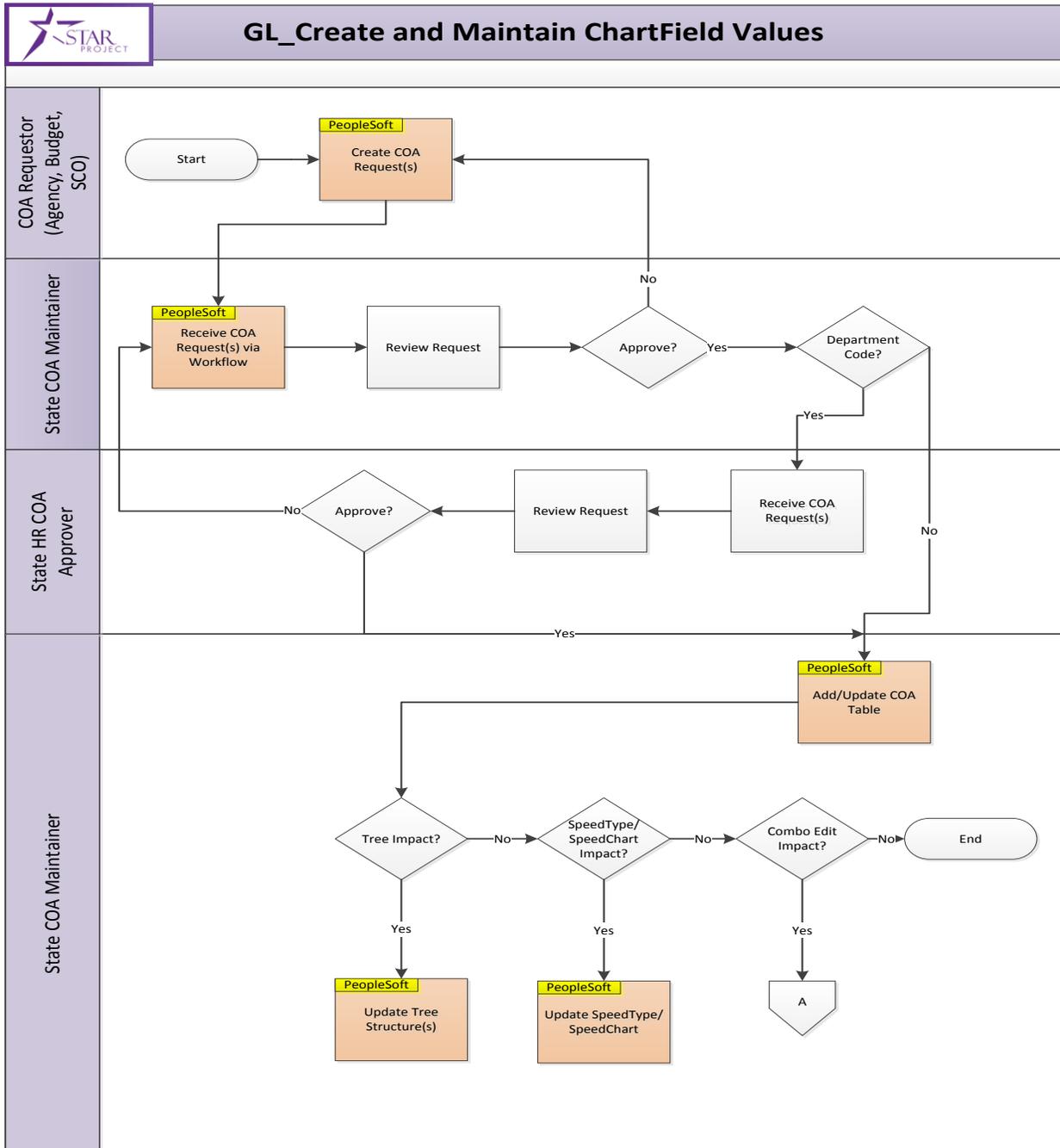
The key activities involved in the ChartField Submission Request process are defining the ChartField value(s) to be added, changed or deleted and creating a ChartField Request to be routed for approval.



ACTIVITY 1: CHARTFIELD SUBMISSION REQUEST

Process Flow

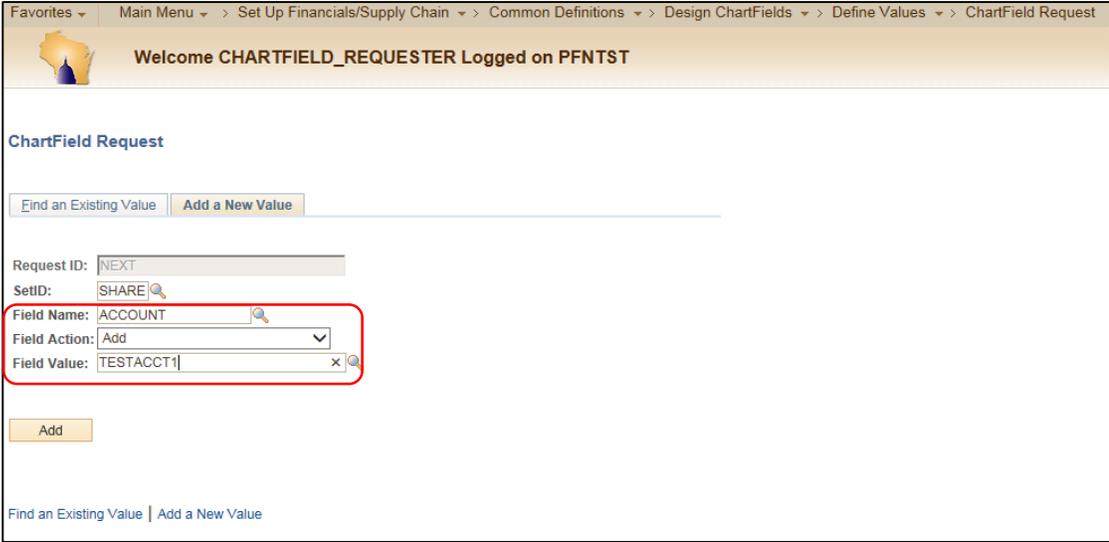
Given below is the Create and Maintain ChartField Values business process flow. This process flow will help you understand the system-generated actions as well as the tasks that are performed manually when creating a request to update ChartField values.





ChartField Submission Request Procedure Steps

Scenario: ChartField values may need to be added, changed, or deleted from time to time. Users will request additional values by following the steps explained below.

Step	Action
1.	<p>To create a request, navigate to: Set Up Financials/Supply Chain > Common Definitions > Design ChartFields > Define Values > ChartField Request > Add a New Value</p>  <p>Users must fill in the following fields:</p> <ul style="list-style-type: none"> • Field Name • Field Action • Field Value



After clicking **Add**, fill in the Request and Submit for Approval.

Mandatory fields:

- Select the appropriate Core Information checkboxes
- Effective Date
- Status
- Short Description (10 character limit)
- Justification for the ChartField update, as Request Comments or in an Attachment

2.

Workflow: The Request must be approved by the State COA Maintainer (someone at DOA), who also enters the ChartField value. Department ChartField updates require additional review and approval by State HCM COA Approver (DOA).

3.