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How do I process my Request?

- x NUFinancials ChartField Request Form: Add or Update

Add Selections\* – New ChartField/s

<u>(Chart)Field Name</u>	<u>(Chart)Field Long Name</u>
ACCOUNT	Account (Code)
CHARTFIELD1	ChartField 1 (Code)
DEPTID	Department (ID)
FUND_CODE	Fund Code
PROGRAM_CODE	Program Code
PROJECT_ID	Project (ID)

\*The electronic form utilizes a **copy** function for multiple, similar Adds.

Update Actions – Existing ChartField/s (see above list)

Inactivations (chartfield only, see below for exclusions)  
Reactivations  
Descriptions  
Modify End Date

- x Exclusions from the electronic

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- o Combination Chartstring Inactivations: see website for instructions (no changes to process)
  - o General ChartField Maintenance Questions or Other Requests

Where do I find the electronic ChartField Request form?

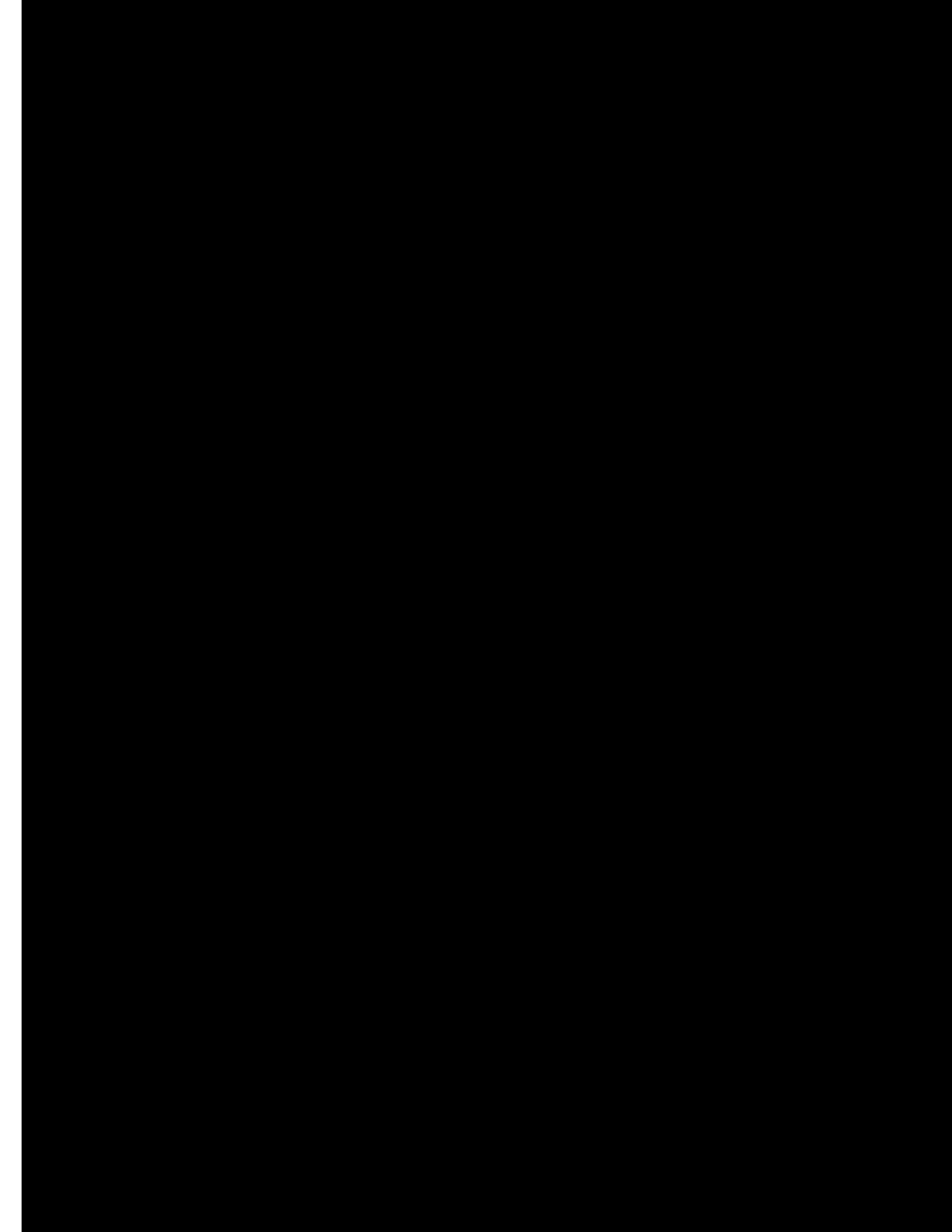
- x NUFinancials, Accounting/Budgeting home screen selection, ChartField Request tile (you can also search for ChartField Request using the global search function). See screenshot below.
- x Link will be available from the NUPortal, under Financial related links.

ChartField Maintenance  
General Guide for Processing ChartField Requests  
Effective June 19, 2017

Who can create a ChartField Request and are there security requirements?

Any staff with access to NUFinancials will have access to the ChartField Request form. However, only an authorized user/submitter will be allowed to approve a request for a particular area. Chartfield Maintenance established the appropriate security roles in 9.2 using existing authorized user/submitter permission lists managed by Accounting Services prior to the 9.2 transition. If you would like to add or modify a user to the authorized list for a particular area, please complete a security access form which is managed by Financial Operations IT.

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Anything else that I should keep in mind?

Yes, please note that required fields are generally referenced with asterisks.

You can monitor Chartfield Request status in NUFinancials from the request page; see snapshot below – ‘Find and Existing Value’ tab.

Please share this document with your area and anyone that may be submitting a Chartfield Request.

Please utilize the training available in myHR Learn.

Who should I contact if I have questions?

Contact ChartField Maintenance for general business process questions or for specific request guidance.

[chartfield\\_request@northwestern.edu](mailto:chartfield_request@northwestern.edu)

Reginold C George, Manager Accounting Services, 847.467.1359

Roberto De Rose, Director Accounting Services, 847.467.2764

Accounting Services, general, 847.491.5337

If you are experiencing system technical difficulties, you may need to contact the IT Help Desk.

NUIT Support Center [consultant@northwestern.edu](mailto:consultant@northwestern.edu)

Visit <http://www.it.northwestern.edu/supportcenter/get-help.html>

Or call 1-HELP