Financial Structure Request Maintenance

General Guide for Processing ChartField Requests

Effective December 18, 2021

Overview

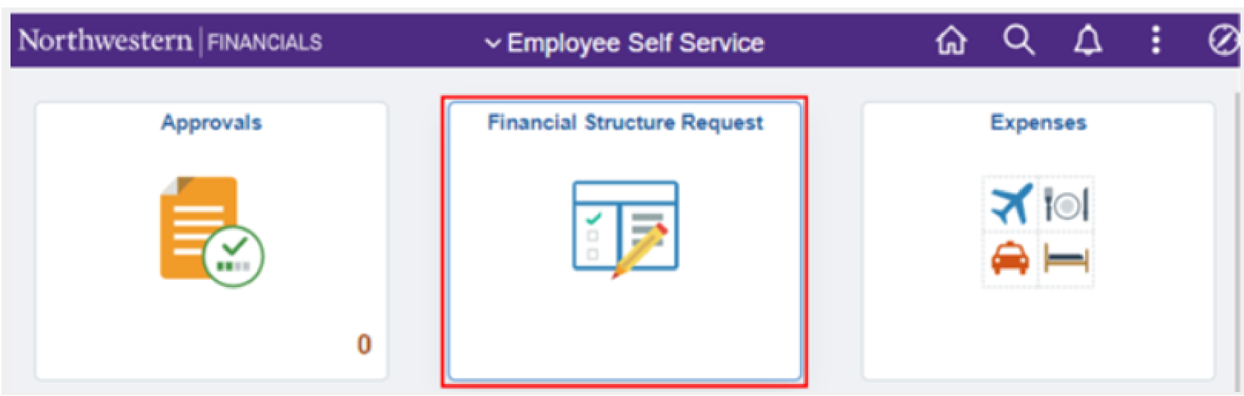
Effective December 18, 2021, ChartField Maintenance will utilize the electronic ***Financial Structure Request*** form available in NUFinancials. The following sections are intended to provide general business process information. Detailed instructions are available in the Knowledge Base.

Who can create a Financial Structure Request and are there security requirements?

Any staff with access to NUFinancials will have access to the Financial Structure Request. However, only an authorized user/submitter is allowed to *approve* a request for a particular area. If you would like to add or modify an authorized user for a particular area, please complete a Financial Operations IT security access form.

Where do I find the Financial Structure Request form?

NUFinancials, Accounting/Budgeting or Employee Self Service home screen selection, Financial Structure Request tile (you can also search for Financial Structure Request using the global search function). See screenshot below.



How do I process my Request?

- NUFinancials ***Financial Structure Request*** Form
- Refer to specific Knowledge Base instructions to Add or Update ChartField

Add Actions for **New** ChartField(s)

ChartField Name	**ChartField Long Name**
ACCOUNT	Account (Code)
CHARTFIELD1	ChartField 1 (Code)
DEPTID	Department (ID)
FUND_CODE	Fund Code
PROGRAM_CODE	Program Code
PROJECT_ID	Project (ID)

Update Actions for **Existing** ChartField(s)

- Inactivations (Chart**Field** only, see below for exclusions)
- Reactivations
- Descriptions
- Modify End Date

- Refer to the website for instructions if combination chart **string** inactivations are needed

Should I enter a *field value* for all requests?

For Add, the type of request will determine whether or not a field value is needed when you start the process.

- Enter the field value you would like for Account, Department ID, Fund Code requests or Program Code requests
- ChartField1 and Project ID field numbers are auto-assigned

For Update, choose the existing field value to be updated

What start and end dates do I enter?

	Add (New ChartField)	**Update (Existing ChartField)**
Start / Effective Date	Choose the start of the fiscal year as the default, although a future date may be used.	Do not change unless there is a special need to modify the start date, or an error was made in initial set-up.
End Date	Choose the date when the program is expected to end; if there is no known end date enter 08/31/2049 as a default.	Choose the date when the program is expected to end; if there is no known end date enter 08/31/2049 as a default.

Which attributes do I choose?

Attributes Required (X) for Common ChartField Types[1,3]

(Chart)Field Name	**Class** (see guide for reference)	**Purpose** (see next table for additional guidance)	**Fund** (see guide for reference)
Project (ID)[2]	X	X	X
Department (ID)	X		

1. Attributes not required for Fund Code, Program Code, ChartField 1 (Code), or Account (Code).

2. *Plant* also needs an attribute for *PLANT TRSTEEUSE*.
3. Management Level is also available as an optional attribute.

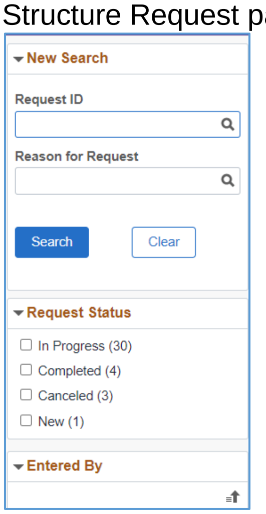
(Chart)Field Name	Type of Project ID	Purpose (system reference)
Project (ID)	Designated or Self Supporting or Student Loans	CURRT_PURPOSE
Project (ID)	Gift	GIFT_PURPOSE
Project (ID)	Endowment	END_PURPOSE
Project (ID)	Agency	AGNCY_PURPOSE
Project (ID)	Plant	PLANT_PURPOSE

Is there workflow in the system?

Yes, the Financial Structure Request form will route electronically in NUFinancials, similar to other transactions. At a minimum, there will need to be department and Accounting Services approval, however, the workflow route will depend on the type of request. You may also add a 'Reviewer' or 'Approver' to a particular request workflow route. There is also an approval step at the end of the cycle noted as Financial Operations IT to finalize the request in the system.

Anything else to keep in mind?

- Required fields are generally referenced with asterisks.
- You can monitor Financial Structure Request *status* in NUFinancials from the Financial Structure Request page



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
- Accounting Services, general, 847.491.5337

For system technical difficulties, contact the Northwestern IT Service Desk at:

- consultant@northwestern.edu or 847-49**1-4357** (1-HELP)
- https://www.it.northwestern.edu/supportcenter/index.html