

Department ID

ChartField Request Form Add/Inactivate a ChartField Value

The chartfield maintenance staff may contact you if more data is needed to complete the set-up. See the Chartfield Maintenance website for policies & procedures.

(<http://www.northwestern.edu/controller/accounting-services/chartfield-maintenance/index.html>).

Contact Information (Add name and email to “notify list” to receive complete notification)

Requestor Name:	<input type="text"/>	Date:	<input type="text"/>
Email Address:	<input type="text"/>	Phone:	<input type="text"/>

Add DeptID (*required field)

*Fund	<input type="text"/>
*Effective Date for action:	<input type="text"/>
*Requested new Value (numeric):	<input type="text"/>
*Description of new Value:	<input type="text"/>
Similar Value to be used as model (if exists) :	<input type="text"/>
*Long Description of new Value:	<input type="text"/>
*Class:	<input type="text"/> Link to Class Coding Guide
Manager Name:	<input type="text"/> EmplID: <input type="text"/>
*Reason to create new value and brief description of activities:	<input type="text"/>

Budget Setup (must choose one budget set-up option)

For budget templates navigate using the following link: <http://www.northwestern.edu/budget/operations/index.html> then page down to section: 5) *Budget Journals-Making Budget Changes*.

- ☐ Establish original zero dollar budget (no template needed)
- ☐ Establish original specific budget per attached template
- ☐ No budget needed as will be associated with project ID

NUPlans 'Child' Budget Grouping

(please contact your budget analyst if you have questions)

NUFinancials - Workflow and Row Level Security Access

Please ensure Workflow and Row Level Security access for your new Department ID request are already in place for responsible individuals to approve transactions and view Cognos Reports. To grant this access, please contact [FOIT Security](#).

Inactivate DeptID (*required field)

*Effective Date for action:

*Value to be inactivated:

*Name of Value:

*Reason that Value should be inactivated:

List Individuals to Notify (must include at least one)

1. Name

Email

2. Name

Email

3. Name

Email

4. Name

Email

5. Name

Email

Approved by (for registered users only)

Name

Date

For Internal Central Office use only

Approved by for Accounting Services

Name

Date

Is a new node required? If yes, please attach tree viewer screenshot indicating node or range under which new node should be placed.

☐ Yes

☐ No

DeptID
Short
Manager
Fund

Budget\$
Exp#
Rev#
Email Date