ChartField Request Form

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Process Overview

This document will discuss the steps to request a new ChartField in ARC. The ChartField Request Form ("CRF") needs to be filled out for both creating a new ChartField or for updating an existing ChartField. All requests are submitted to the Office of the Controller ("OTC") for final approval and input into ARC.

- To initiate a request, a requester fills out the CRF in ARC with the required details (non-required fields can be left blank).
- The requester selects a Departmental Approver from a list of all Departmental Approvers in the University. The Departmental Approver will review the request, at that point they can cancel the request, or make any necessary changes.
- When the Departmental Approver is satisfied with the request they will submit the CRF. By submitting the request the Departmental Approver is approving the ChartField creation or update. Neither the Requester nor the Departmental Approver can change a request once it has been submitted.
- At least once a day OTC will use a query to find requests waiting in submitted status and review the requests.

For new Project and Department requests there may be an extra level of review by certain "Central Approvers" such as the Budget Office (OMB) and Office of Alumni and Development (OAD).

- Central approvers will have the ability to edit the request, fill in project attributes that the departments have left blank, and will need to approve the Project.
- Central approvers will need to indicate their approval by typing it in the 'Additional Information' text box.
- Central Approvers will use a query searching for submitted status and the Project Type field to find requests to review and approve.

For Projects:

- For a Capital project, OMB will review the request; if it is a gift, OAD will review the request; if it is an endowment, Endowment Compliance will review the request; unrestricted projects do not require an additional review or approval.
- Grants are not created through the ChartField request form, they will be created through InfoEd, and therefore any request for grant projects will be denied by OTC.

For Departments:

- New Departments will require OMB review and approval. In addition, any requests to move Departments on the tree are also potentially subject to OMB review and approval.

Once all the approvals are received, OTC will then review the request and either approve or deny the request.

- If the request is approved, OTC will manually create the ChartField in ARC using the information provided on the CRF as well as other ChartField governing rules.
- If a ChartField is denied, no further action can be taken on that request. If a department wants to pursue the request further they will need to create a new request.
- Requesters and Department Approvers can use the query or search page to determine the status of the request.

Summary of Roles and Responsibilities

- **Requester:**
  - Creates Request
  - Selects Departmental Approver
- **Departmental Approver:**
  - Reviews & Edits Request
  - Submits Request
- **Central Approver** (For Project and Department Only):
  - Review & Edits Request
  - Indicates ”Approved” or “Not Approved” in ‘Additional Comments’ text box
- **Controller’s office:**
  - Approves ChartField
  - Enters ChartField in ARC

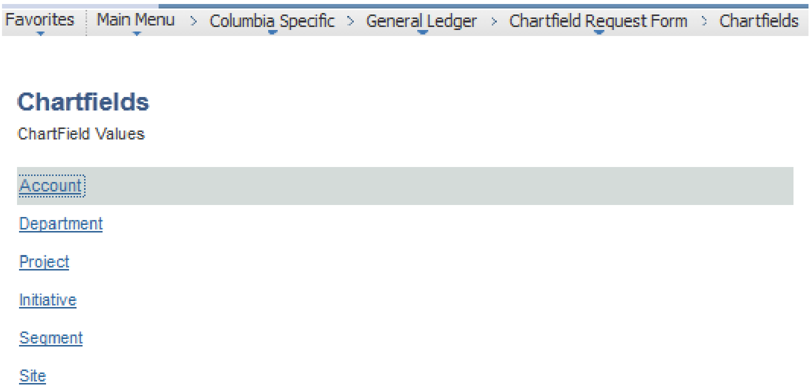
Creating a Request

A. To get to the CRF:

- From the ARC Portal scroll to the bottom of the page. Under "Tools and Forms" click "Chart of Accounts Request Form"

Or

- From ARC navigate to Columbia Specific > General Ledger > ChartField Request Form > ChartFields



B. Click on the hyperlink of the ChartField you wish to add or modify. (Please note that although the Account and Site ChartFields are displayed on this list, these values are relatively fixed and should generally not be selected)

C. The 'Add a New Value' tab should be displayed, Request ID should be set to NEXT. Note that 'Add New Value' refers to adding a new request for either a new ChartField or to update a ChartField. (the other tab, 'Find an Existing Value', refers to finding an existing request – not an existing ChartField)

D. Leave Request ID set to 'NEXT.' Once a request is saved a request number will be generated. Click the 'Add' push button.

E. CRF will default to 'Add a New ChartField '. If you wish to update an existing ChartField value use the radio button to select 'Update ChartField'. Once selected, you must complete all required fields , as indicated by an asterisk.

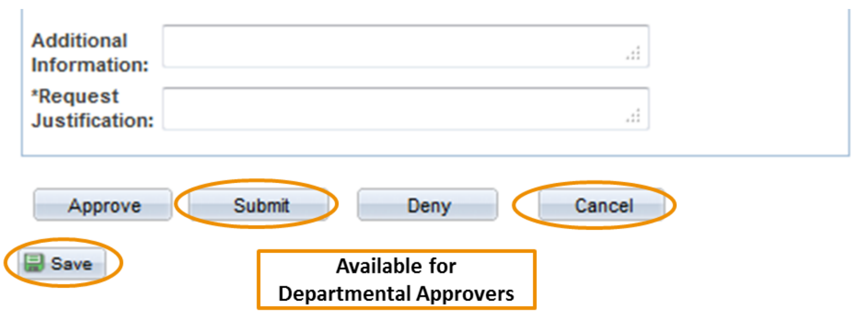
F. Select the Departmental Approver for your School / Department.

Submitting/Approving ChartField Request Form

Departmental Approvers

Departmental Approvers can either use the query called CU_GL_CF_REQUEST_FORM to search for all new requests assigned to them and navigating to the 'Find an Existing Value' tab, or by navigating directly to the 'Find an Existing Value' tab and using available search criteria. Once on the request page, Departmental Approves can alter any field. Aside from editing the request, Departmental Approvers have three possible actions to take on the page:

- Cancel: selecting 'Cancel' will change the request status to cancel, after changing it to cancel, the request cannot be submitted or approved and is effectively done.
- Save: Departmental Approver can save the request to work on it further later or just prior to submitting it (it must be saved before it can be submitted). The request can also be re-assigned to another Approver by editing the Departmental Approver field and saving the request.
- Approval: by selecting 'Submit' the Departmental Approver is approving the request and submitting it to OTC. **You must hit save before you submit**.



Central Approvers

Central Approvers should use the query called CU_GL_CF_REQUEST_FORM to search for all submitted requests with the appropriate Project Type, then navigate to the request by navigating to the 'Find an Existing Value' tab . Once on the request page Central Approvers can alter any field. Aside from editing the requests, Central Approvers have two possible actions to take:

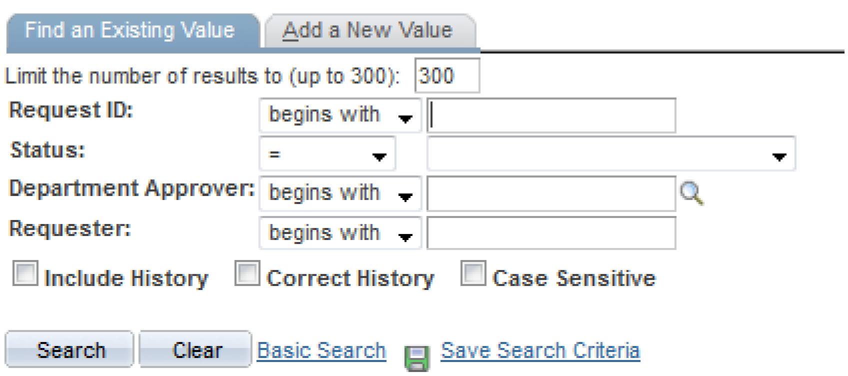
- Save: Central Approver can make changes and then save the request
- To approve or deny a request enter "Approved by (name)" or "Denied by (name)" in the 'Additional Information' text box and hit Save. E-mail must be used to then notify OTC that it is ready.

Looking Up an Existing Request

A. To navigate to the CRF:
   - From the ARC Portal scroll to the bottom of the page. Under "Tools and Forms" click "Chart of Accounts Request Form"

   Or

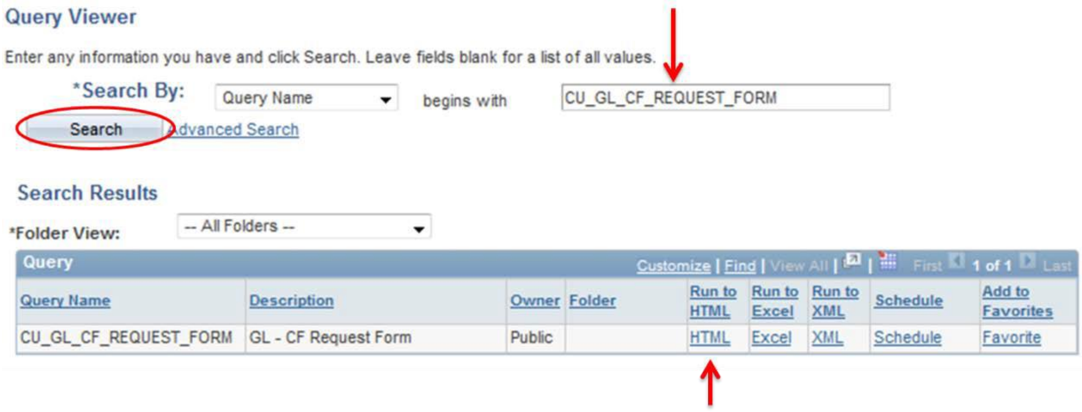
   - from ARC navigate to Columbia Specific > General Ledger > ChartField Request Form > ChartFields



B. Select the ChartField of the request.
C. Select the 'Find Existing Value' Tab.
D. Search criteria include Request ID, the UNI of the requester, the Status of the Request and/or the Departmental Approver. Enter desired values and click 'Search.' Results will populate below.
E. Click on any field in the list to be taken to that request.
F. Note: once a request is Submitted, Requesters and Departmental Approvers cannot edit a request, only view it.

Using the Queries

To query the status of CRFs, please navigate to Reporting Tools > Query > Query Viewer. Enter the query name CU_GL_CF_REQUEST_FORM and click 'Search'. Results will populate below. Click the 'HTML' hyperlink next to the query name. If applicable fill in the prompt and click 'View results.' Results will populate below.



ChartField Specific Details

Account (this should be rarely requested)

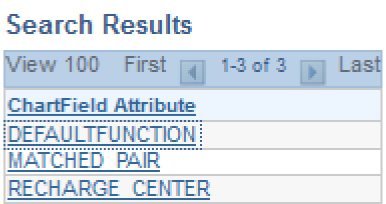
Requesting a new Account

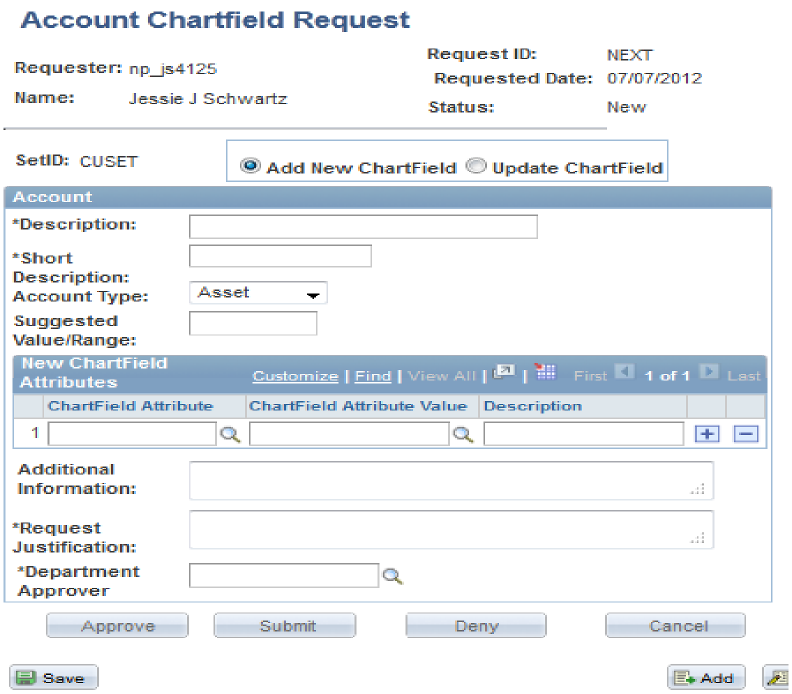
Account Section:

A. Enter a Description and Short Description for the Account. Description can only be 30 characters long, Short Description can only be 15 characters long.
B. Select a Type of Account: Asset, Equity, Expense, Liability or Revenue.
C. If you know the suggested value range, you can enter it here, but ultimately OTC will assign a value to the Account. This field can be left blank.
D.

New ChartField Attributes Section: (Optional)

E. Use the look up tool to select a ChartField Attribute. For Account there are only 3 types.

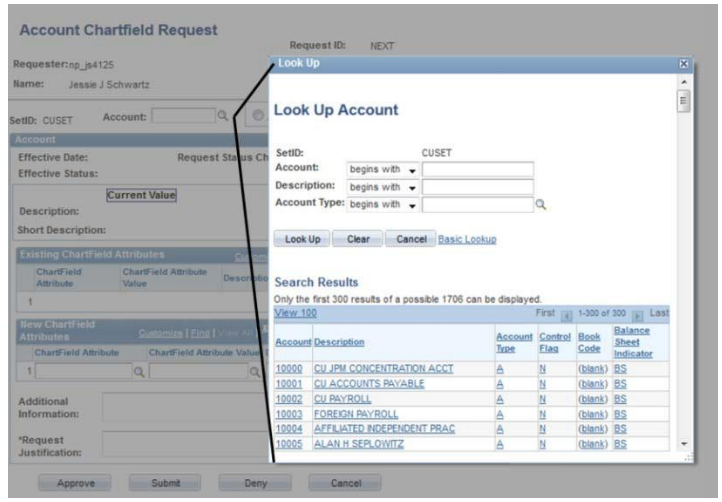




- Default Function – will become the function for any transaction using this account. (For further information on Default Function, please see the Appendix at the end of this Job Aid)
- Matched Pair – used for internal transfers, transfers will only be allowed to occur between this account and itself or this account and its matched pair account.
- Recharge Center – this attribute is a flag 'Y' to indicate if the department is a recharge center. (Recharge Center Accounts are controlled by OTC, please see the Recharge Center Job Aid for further information)

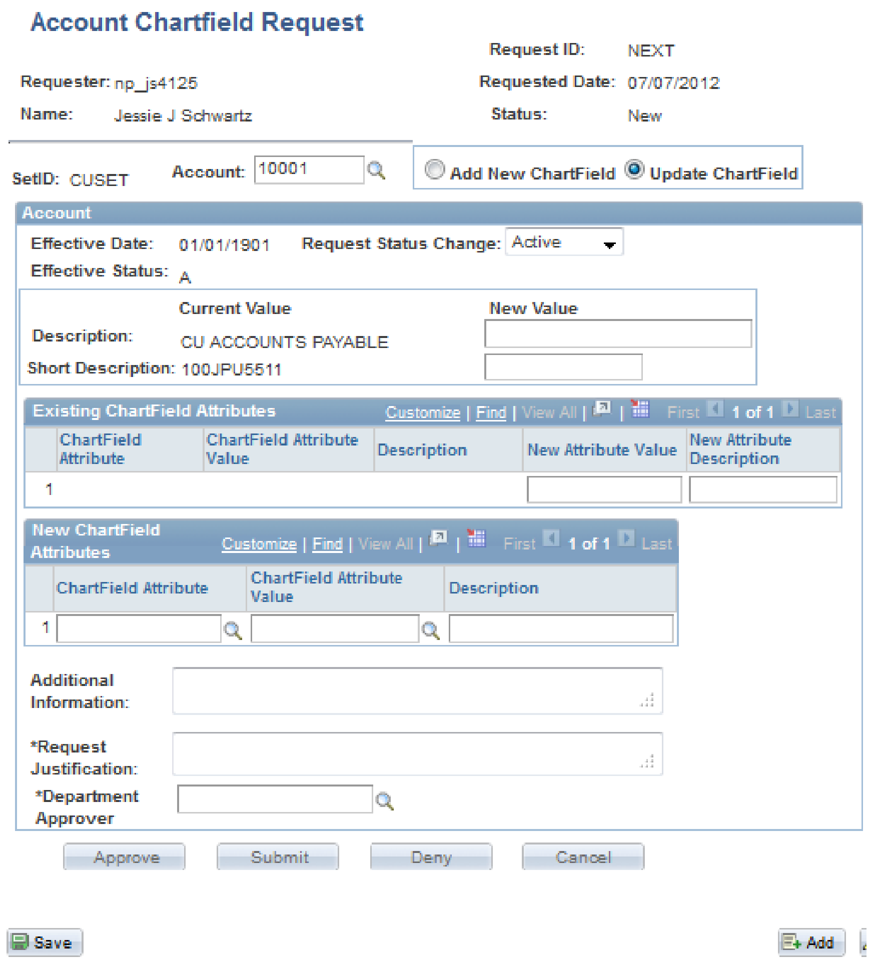
F. Use the look Up tool to select an attribute value, or you can type in a new attribute value.
G. Description will auto populate if you choose an existing attribute value, if making an new attribute value enter a description as well.
H. To add another ChartField attribute click the '+' button on the attribute line. Repeat steps J-L for all desired attributes. The '-' sign will delete an attribute row.
I. Fill in Request Justification (required field) and the Additional Information field if necessary.
J. Select UNI of Departmental Approver.
K. Click 'Save. ' A Request ID is generated and displayed at the top of the page.

Requesting an Update to an Existing Account



A. Enter the Account number you wish to update, or use the Look up tool and search for an Account. Current values for the Account should populate in the field to the left. Any existing attributes will populate in the 'Existing ChartField Attributes" section.
   a. To use the Look Up Tool, click the magnifying glass next to a field.
   b. Enter information into one of the prompts: Account, Account Description, or Account Type, Click 'Look Up'.
   c. Click the Desired Account number. It will populate the Account Field.

B. To inactivate a ChartField, or reactivate an inactive ChartField, Select the appropriate status from the 'Request Status Change' drop down menu. The current status displayed under 'Effective Status' will either say 'A' for active or 'I' for inactive.



C. To update any field, fill in the new value in the field to the right. You do not need to fill in all the value fields, just the fields that need to be changed. This includes changing an existing ChartField attribute.

D. If adding attributes, use the Look Up Tool to choose an attribute. This section can be left blank. (See Requesting a New Account for more information about ChartField Attributes).

E. Fill in Request Justification (required field) and the Additional Information field if necessary.

F. Select UNI of Departmental Approver.

G. Click 'Save.' A Request ID is generated and displayed at the top of the page.

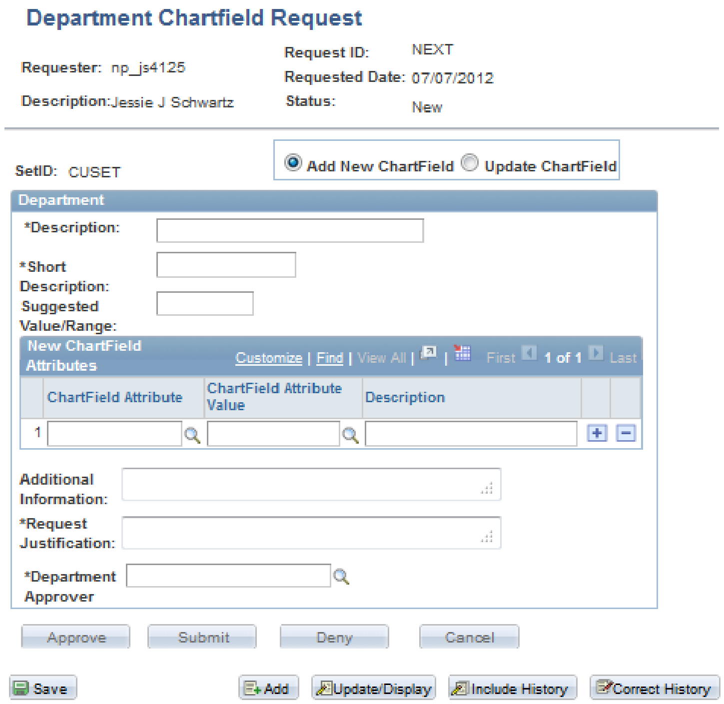
Department

Requesting a new Department

Department Section:

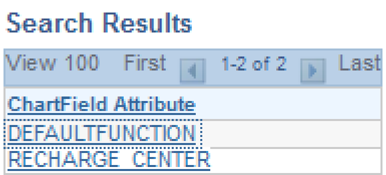
A. Enter a Description and short description for the Department. Both should begin with a three character origin code for the department, see Department Origin Code Job Aid. Description can only be 30 characters long, Short Description can only be 15 characters long.

B. If you know the suggested value range for the Department, you can enter it here, ultimately OTC will assign a value to the department. You can also just enter the first few digits of the department or this field can be left blank.



New ChartField Attributes Section:

C. Use the look up tool to select a ChartField Attribute. For Department there are only 2 types.



- Default Function – **This attribute is Required**. It will become the function for any journal entry using this departments and that does not have another higher ranking ChartField with a default function. (For further information on Default Function, please see the Appendix at the end of this Job Aid)
- Recharge Center – This attribute is a flag 'Y' to indicate if the department is a recharge center (only departments with licenses can have this attribute – licenses are controlled by OTC, please see the Recharge Center Job Aid for further information).

D. Use the look Up tool to select an attribute value, or you can type in a new attribute value.

E. Description will auto populate if you choose an existing attribute value, if making an new attribute value enter a description as well.

F. To add another ChartField attribute click the '+' button on the attribute line. Repeat steps I-K for all desired attributes. The '-' sign will delete an attribute row.

G. Fill in Request Justification (required field) and the Additional Information field if necessary. If there is a particular place the department should be in the Department Tree (what node or XX-XX-XXX level department the new department should be under) please indicate that here.

H. Select UNI of Departmental Approver.
I. Click 'Save.' A Request ID is generated and displayed at the top of the page.

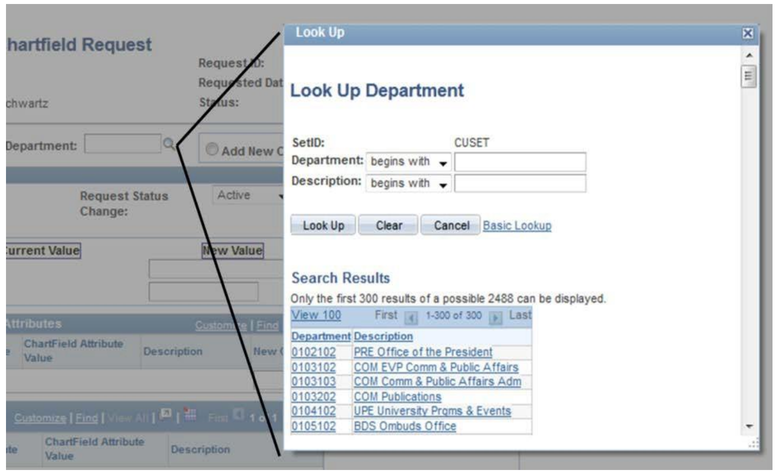
Requesting an Update to an Existing Department

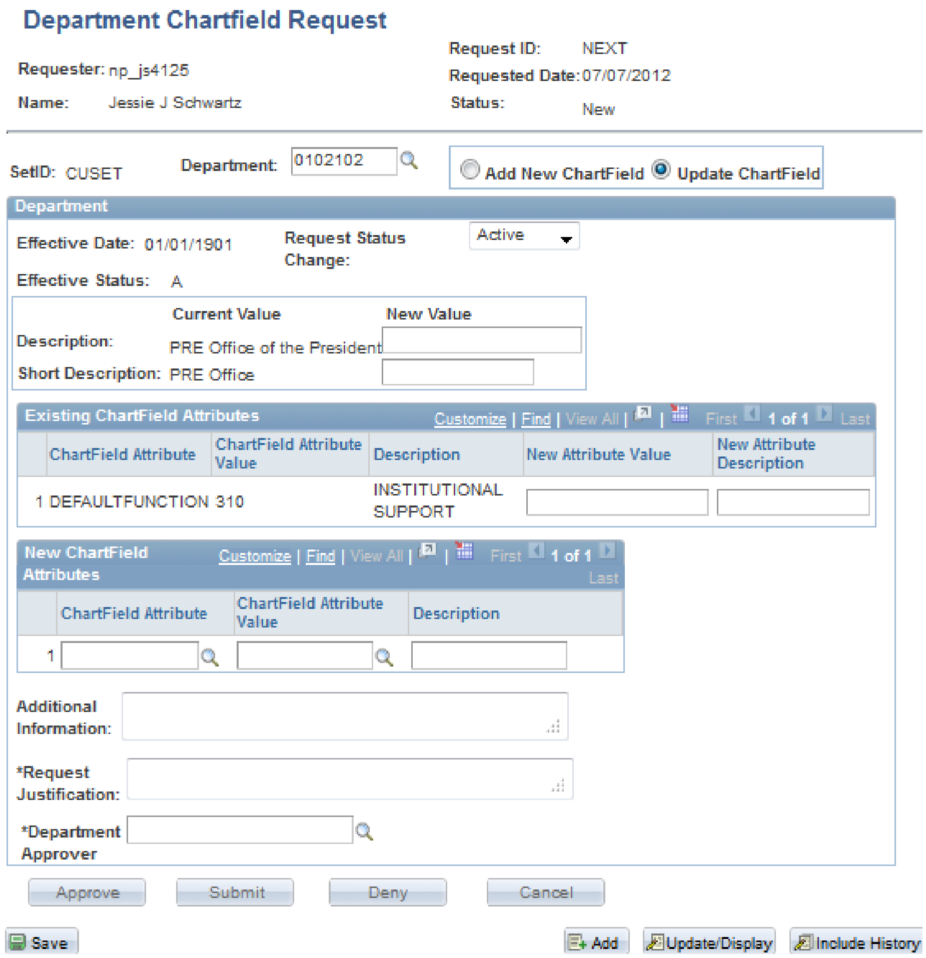
A. Enter the Department number you wish to update, or use the Look Up tool and search by number or description.
Current values for the Department should populate in the field to the left. Any existing attributes will populate in the 'Existing ChartField Attributes" section.
   a. To use the Look Up Tool, click the magnifying glass next to a field.
   b. Enter information into one of the prompts: Department and Description, Click 'Look Up'.
   c. Click the desired Department ID. It will populate the Department Field.

B. To inactivate a ChartField, or reactivate an inactive ChartField, Select the appropriate status from the 'Request Status Change' drop down menu. The current status displayed under 'Effective Status' will either say 'A' for active or 'I' for inactive.

C. To update any field, fill in the new value in the field to the right. You do not need to fill in all the values field, just the fields that need to be changed. This includes changing an existing ChartField attribute.

D. If adding attributes, use the Look Up tool to choose an attribute. This section can be left blank. (See Requesting a New Account J for more information about ChartField





Attributes.)

E. Fill in Request Justification (required field) and the Additional Information field if necessary. If you wish to make changes to the placement on the Department Tree it should be indicated here.

F. Select UNI of Departmental Approver.

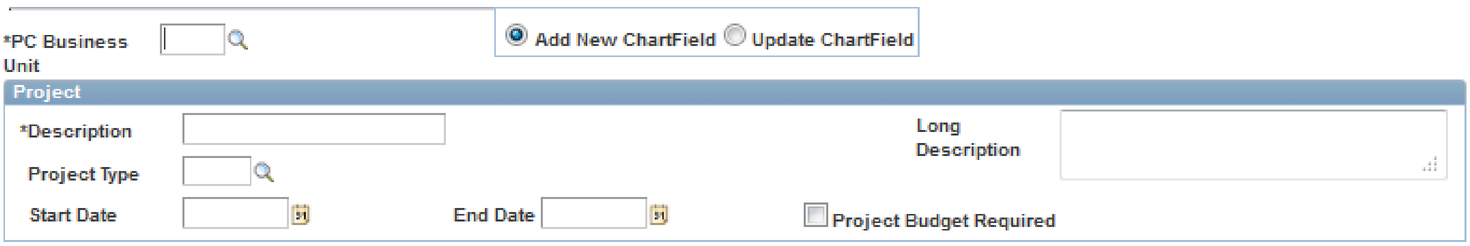
G. Click ‘Save.’ A Request ID is generated and displayed at the top of the page.

Project
Requesting a new Project

A. Select a PC Business Unit. Choices are GENRL - General, CAPTL – Capital. Any SPONS Projects will be automatically denied by the controllers office. Sponsored projects will be created and modified from InfoEd. Clinical Trial Projects should be classified as a GENRL Project.

Project Section:

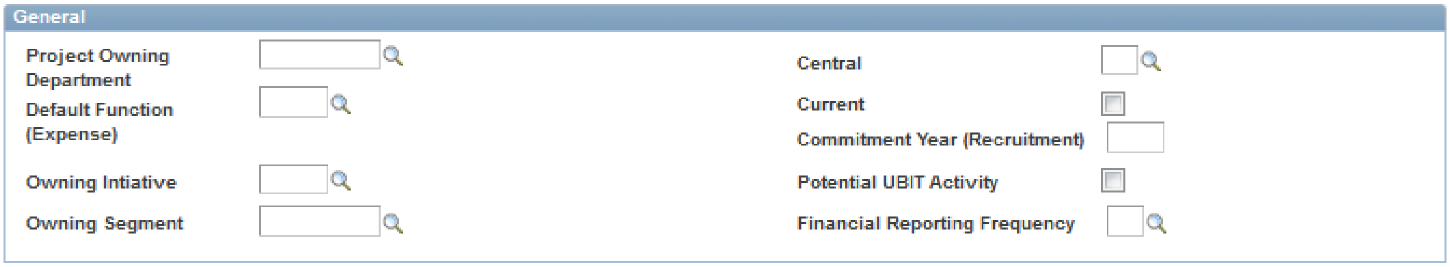
B. Fill in all required fields. Fill in Project Type by clicking the look up icon and select Project Start and End Dates by clicking the calendar icon.



Field	Field Description	Required / Optional
Business Unit	General classification of a Project - General, Capital and Sponsored	Required
Description	Project Title – 30 character limit	Required
Long Description	Long description of Project - no character limit	Optional
Project Type	Further breakdown of PC Business Units into types	Required
Project Start Date	Project Start Date	Required
Project End Date	Project End Date	Optional

General Section:

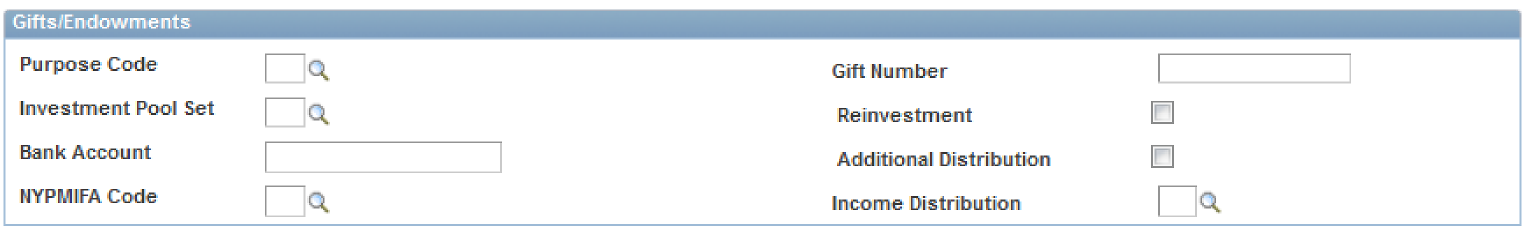
C. Fill in all required and relevant fields.



Field	Field Description	Required / Optional
Project Owning Department	Responsible Department	Required
Default Function (Expense)	Expense Function ChartField (see Appendix for more information)	Optional
Owning Initiative	To calculate MOT automatic funding transfers (this will generally be required for CUMC and not for Morningside – see separate Job Aid)	Optional
Owning Segment	To calculate MOT automatic funding transfers (this will generally be required for CUMC and not for Morningside – see separate Job Aid)	Optional
Central	Central/Non-Central flag	Required
Current	Current /Non-Current flag	Required
Commitment Year (Recruitment)	Commitment Year for Recruitment Projects	Optional
Potential UBIT Activity	Potential Unrelated Business Income Tax (UBIT) Activity flag	Optional
Financial Reporting Frequency	For donor or other reporting if applicable	Optional

Gifts/Endowments Section: (only complete for gift or endowment projects)

D. Fill in all relevant fields – many of these may be left blank to be filled in by OAD or Endowment Compliance.


Gifts/Endowments
Purpose Code
Investment Pool Set
Bank Account
NYPMIFA Code
Gift Number
Reinvestment
Additional Distribution
Income Distribution

Field	Field Description	Required / Optional
Purpose Code	Gift purpose code	Optional
Investment Pool Set	E.g. pooled, separately invested, split-interest agreement	Optional
Bank Account	Bank Account #	Optional
NYPMIFA Code	New York Prudent Management of Institutional Funds (NYPMIFA) Code	Optional
Gift Number	Advance Gift Number	Optional
Reinvestment	Reinvestment flag	Optional
Additional Distribution	70 Base Point flag	Optional
Income Distribution	Income Distribution - UR or TR	Optional

Capital Projects Section: (only complete for capital projects)

E. Fill in all relevant fields – may be left blank to be filled in by OMB.

Field	Field Description	Required / Optional
Project Use	High-level classification used in reporting to Trustees; delineates how project supports University goals and objectives	Optional
Capitalization	Capitalization Yes/No flag	Optional

Sponsored Projects Section: (only complete for clinical trial projects)

F. Fill in all relevant fields.

Field	Field Description	Required / Optional
Sponsor	Direct Sponsor on award	Optional
Funding Mechanism	Cost Reimbursement Contract, Grant, Fixed Price Contract, Cooperative Agreement	Optional
Award Start Date	Award Start Date (Full awarded dates)	Optional
Award End Date	Award End Date (Full awarded dates)	Optional
Research Type	Basic, Applied Research, Development	Optional
Clinical Trial Identifier	P&S or Non P&S	Optional
Interest Bearing	Account where Funds must be kept	Optional

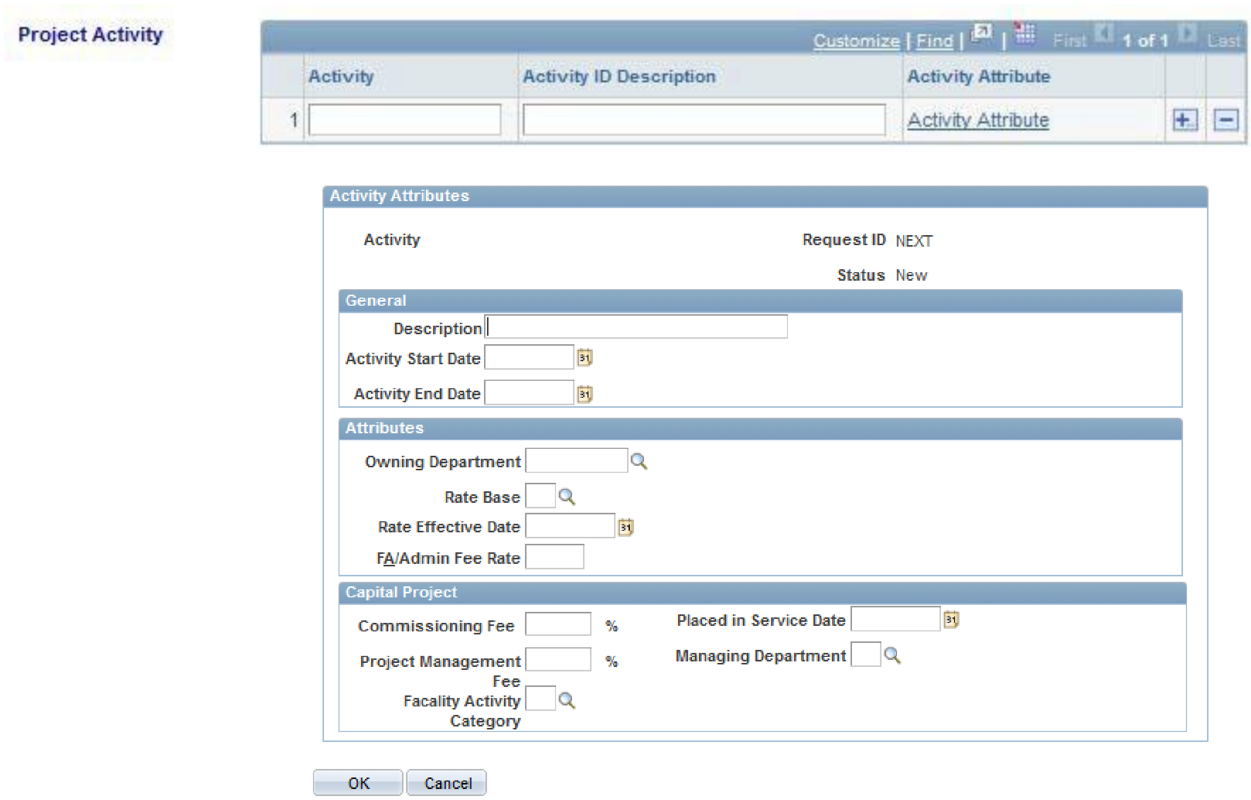
Project Team Section

G. Project Team Section:
a) Fill in Employee ID by clicking the look up icon and searching by name.
b) Fill in Project Role by clicking the look up icon and selecting the appropriate role.
c) Check "Project Manager" for one project team member. The team member who would have had the #1 Responsible person role in the old system would have the Project Manager role in ARC.
d) Enter start and end date for the team member being on the project. If not specified end date choose a date significantly in the future.
e) Repeat a-d for all project team members. Please note, to setup Report Access on a Project, the employee must first be added as a project team member.

Section	Field	Field Description	Required / Optional
Project Team			
	Project Team Empl ID	Employee ID and name of project team members	Optional
	Project Role	E.g. Project Manager, PI, CoPI	Optional
	Project Manager	Designates one team member as the project manager	Optional
	Role Start Date	Project team member start date	Optional
	Role End Date	Project team member end date	Optional

Project Activity Section

H. Project Activity Section:
a) Fill Activity with two digit code (first activity should be '01').
b) enter description of the activity.
c) Click Activity Attribute. Fill out the 'General' section and 'Attributes' section. Fill out 'Capital Project' section for activities on capital projects. When done click 'OK'
d) Click ‘+’ to an additional activity. Repeat steps a-c for every activity created. This will mainly be used for capital projects, or projects the have distinct stages with different reporting needs. If the project does not have distinct reporting needs, a single activity can be created for the project.



Section	Field	Description	Required /
Project Activity			
	Activity	Defines use of scope (scaffolding, budget	Optional
	Activity ID Description	Activity name or description	Optional
Activity Attributes			
General	Description	Title of Activity	Required
	Activity State Date	Activity State Date	Optional
	Activity End Date	Activity End Date	Optional
Attributes	Owning Department	Responsible department on the Activity	Optional
	Rate Base	Rate Base defines the Natural Accounts used to calculate the Admin/Commissioning/Project Mgmt	Optional
	Rate Effective Date	Start Date for Rate Base Calculation	Optional
	FA/Admin Fee Rate	Indirect Cost Rate	Required* *(for Non - Sponsored Projects)*
Capital Project	Commissioning Fee	Facilities commissioning charge	Optional
	Project Management Fee	Facilities overhead charge	Optional

Facility Activity Category	Capital management reporting categories	Optional
Placed in Service Date	Date the Project was substantially complete	Optional
Managing Department	Department that receives the Project Management Fee	Optional

I. Fill in Request Justification (required field) and the Additional Information field if necessary.

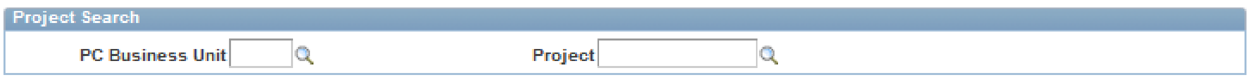
J. Select UNI of Departmental Approver.

K. Click 'Save.' A Request ID is generated and displayed at the top of the page.

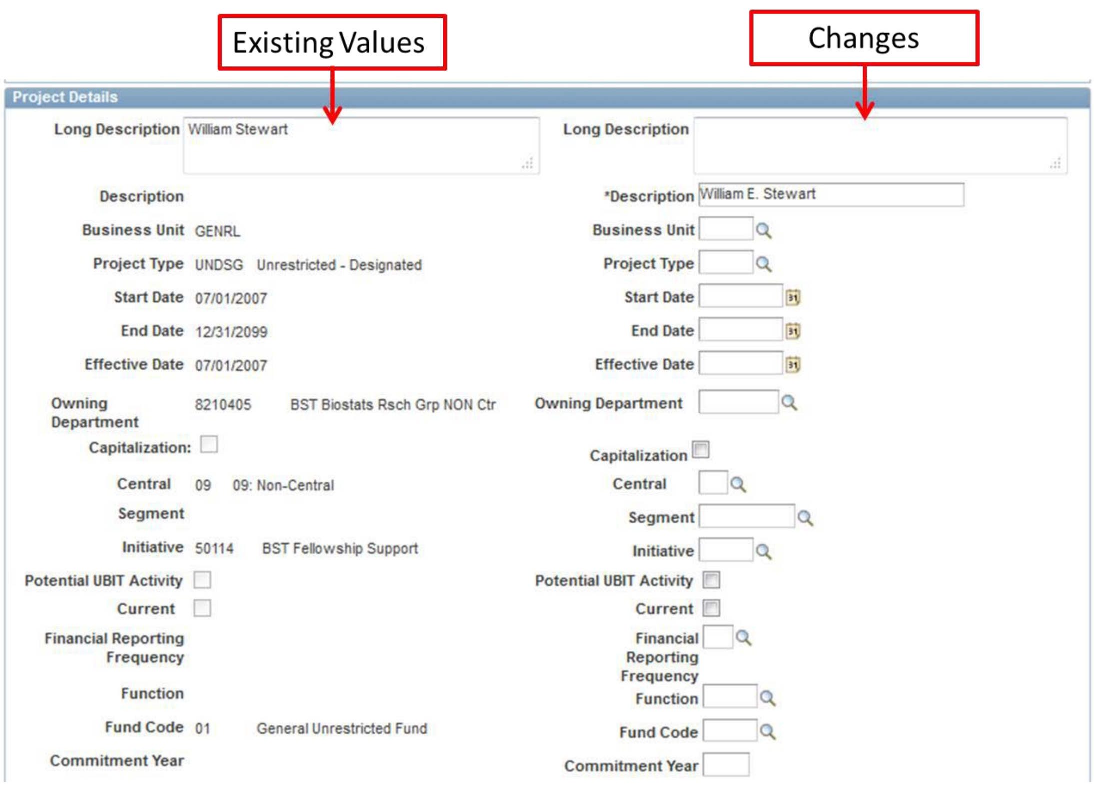
Requesting an Update to an Existing Project

A. Select a PC Business Unit.

B. Enter Project ID of the project to be updated. Current values for the project should populate in the field to the Left.



C. To update any field, fill in the new value in the field to the Right. See Requesting a new Project Section for more details on specific fields. You do not need to fill in all the values field, just the fields that need to be changed.



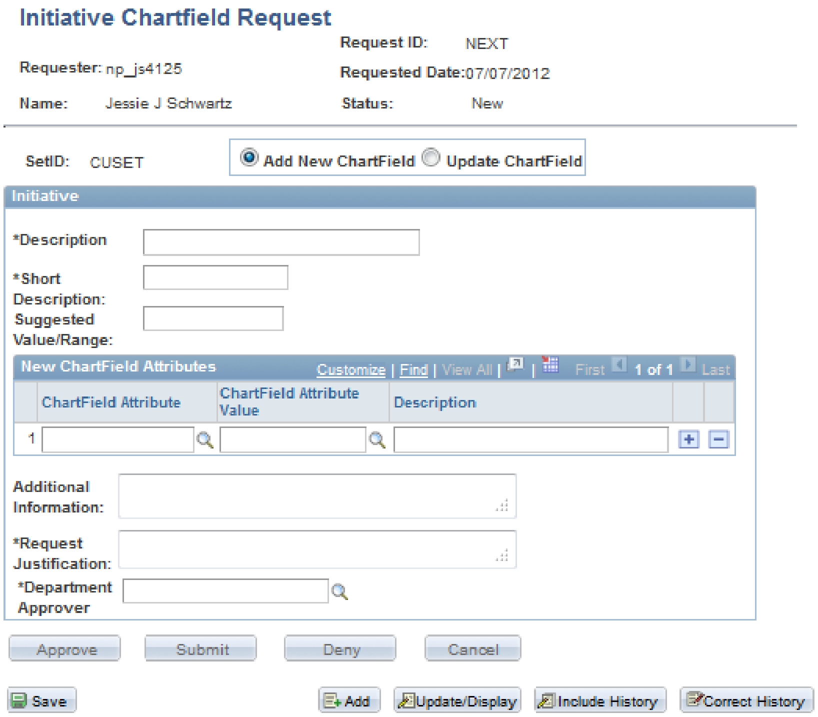
D. After you have filled in all updates. Fill in Request Justification (required field) and the Additional Information field if necessary.
E. Select UNI of Departmental Approver.
F. Click 'Save.' A Request ID is generated and displayed at the top of the page.

Initiative

Requesting a new Initiative

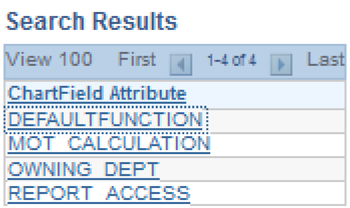
A. Enter a Description and Short Description. Both should begin with a three character origin code for the responsible department, see Department Origin Code Job Aid. Description can only be 30 characters; Short Description can only be 15 characters.

B. If you know the suggested value range, you can enter it here, but ultimately OTC will assign a value to the Initiative. This field can be left blank.



New ChartField Attributes Section: (Optional)

A. Use the look up tool to select a ChartField attribute. For Initiative there are only 3 types.



- Default Function – will become the function for any journal entry using this Initiative and that does not have another higher ranking ChartField with a default function (For further information on Default Function, please see the Appendix at the end of this Job Aid).
- MOT Calculation – is a Flag for whether this initiative needs to be included in MOT calculations (For further information on MOT calculations, please see the Job Aid for MOT Calculations).
- Owning Department – This is used for security purposes and should rarely be used.
- Report Access –It indicates what people (UNIs) will be able to run reports on this ChartField, separate from reporting by Department.

B. Use the Look Up tool to select an attribute value, or you can type in a new attribute value (but only if you are adding a UNI to report access).

C. Description will auto populate if you choose an existing attribute value, if making a new attribute value, enter a description as well. (for UNIs this is the full name)

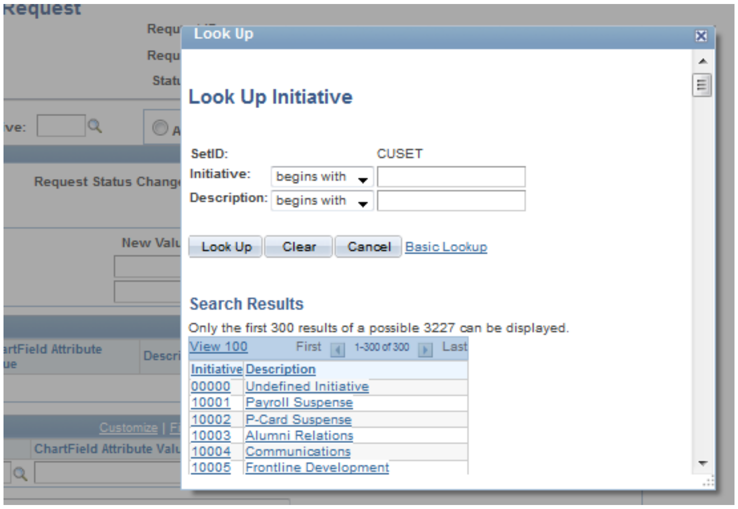
D. To add another ChartField attribute click the '+' button on the attribute line. Repeat steps I-K for all desired Attribute. The '-' sign will delete an attribute row.

E. Fill in Request Justification (required field) and the Additional Information field if necessary. If there is a particular place the Initiative should be in the Initiative Tree please indicate that here.

F. Select UNI of Departmental Approver.

G. Click 'Save.' A Request ID is generated and displayed at the top of the page.

Requesting an Update to an Existing Initiative



A. Enter the Initiative number you wish to update, or use the Look Up tool and search by number or description. Current values for the Initiative should populate in the field to the left. Any existing attributes will populate in the 'Existing ChartField Attributes' section.
   a. To use the Look Up Tool, click the magnifying glass next to a field.
   b. Enter information into one of the prompts: Initiative ID or Description, Click 'Look Up'.
   c. Click the desired Initiative number. It will populate the Initiative Field.

B. To inactivate a ChartField, or reactivate an inactive ChartField, Select the appropriate status from the 'Request Status Change' drop down menu. The current status displayed under 'Effective Status' will either say 'A' for active or 'I' for inactive.

C. To update any field, fill in the new value in the field to the right. You do not need to fill in all the value fields, just the fields that need to be changed. This includes changing an existing ChartField attribute.

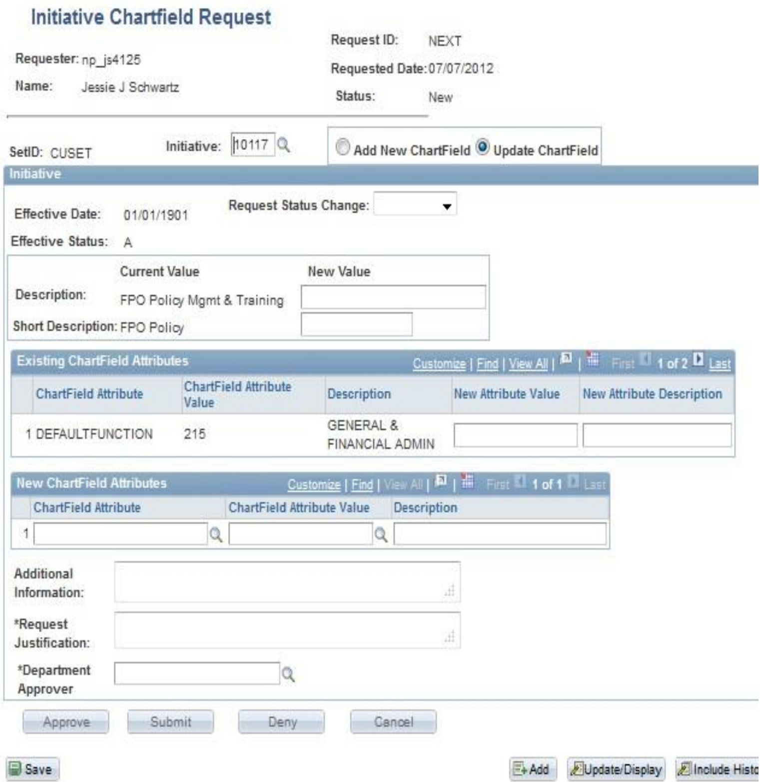
D. If adding Attributes, use the Look Up Tool to choose an Attribute. This section can be left blank. (See Requesting a New Account J. for more information about ChartField Attributes.)

E. Fill in Request Justification (required field) and the Additional Information field if necessary. If you wish to make changes to the

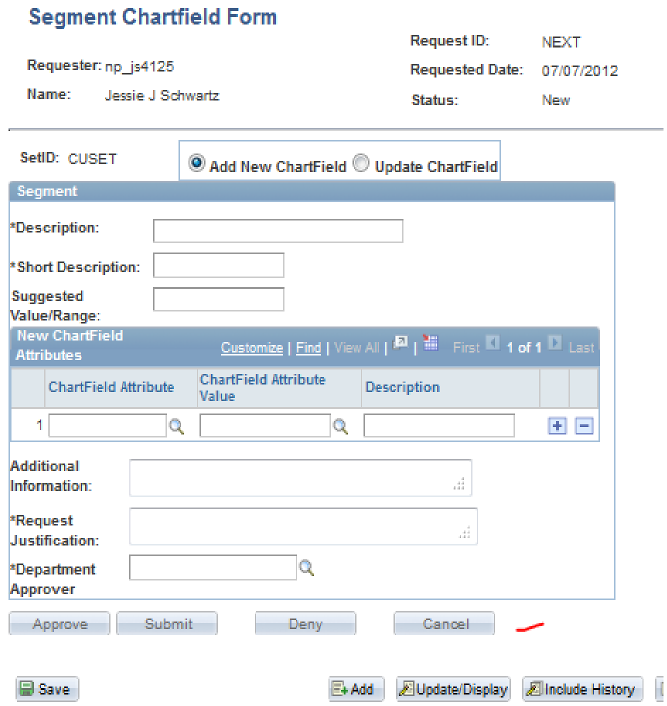
F. placement on the Initiative Tree it should be indicated here.

G. Select UNI of Departmental Approver.

H. Click 'Save.' A Request ID is generated and displayed at the top of the page.



Segment



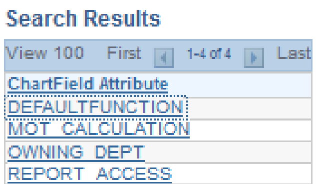
Requesting a new Segment

A. Enter a Description and Short Description for the Segment. Both should begin with a three character origin code for the responsible department, see Department Origin Code Job Aid. Description can only be 30 characters; Short Description can only be 15 characters.

B. If you know the suggested value range, you can enter it here, but ultimately OTC will assign a value to the Segment. This field can be left blank.

New ChartField Attributes Section: (Optional)

A. Use the look up tool to select a ChartField attribute. For Segment there are only 3 types.



- Default Function – will become the function for any journal entry using this Segment and that does not have
  another higher ranking ChartField with a default function (For further information on Default Function please see th
- MOT Calculation – is a Flag for whether this initiative needs to be included in MOT calculations (for further information on MOT calculations, please see the Job Aid for MOT Calculations).
- Owning Department – This is used for security purposes and should rarely be used.
- Report Access – This is the most likely attribute for departments to request. It indicates what people (UNIs) will be able to run reports on this ChartField, separate from reporting by Department.

B. Use the Look Up tool to select an attribute value, or you can type in a new attribute value (but only if you are adding a UNI to report access). Description will auto populate if you choose an existing attribute value, if making an new attribute value enter a description as well. (for UNIs this is the full name of the user)

C. To add another ChartField attribute click the '+' button on the attribute line. Repeat steps I-K for all desired attributes. The '-' sign will delete an attribute row.

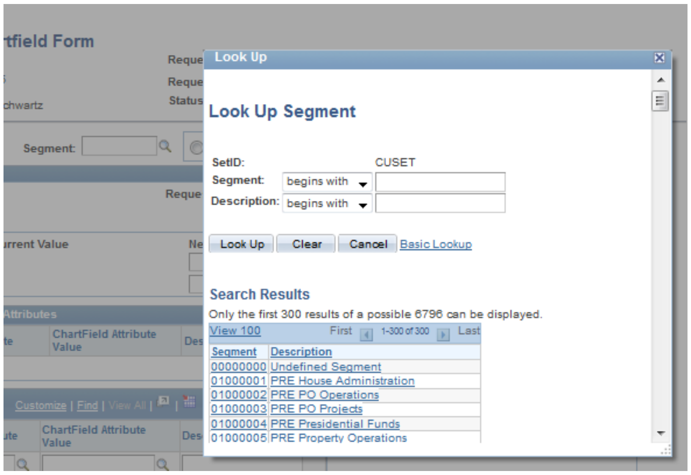
D. Fill in Request Justification (required field) and the Additional Information field if necessary. Please state where in the Segment tree you would like the new Segment placed in the Additional information Field.

E. Select UNI of Departmental Approver.

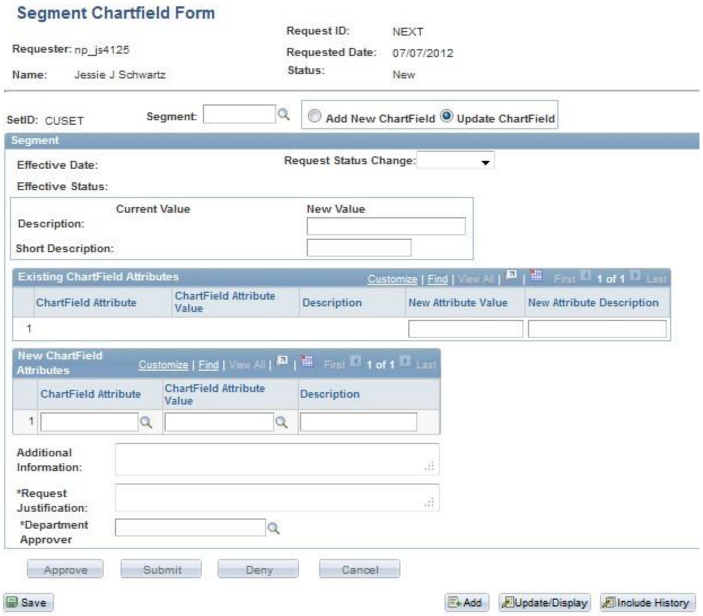
F. Click 'Save.' A Request ID is generated and displayed at the top of the page.

Requesting an Update to an Existing Segment

A. Enter the Segment value you wish to update, or use the Look up tool and search by Segment ID or description. Current values for the Segment should populate in the field to the left. Any existing attributes will populate in the 'Existing ChartField Attributes" section.
   a. To use the Look up Tool, click the magnifying glass next to a field.
   b. Enter information into one of the prompts: Segment ID or Description, Click 'Look Up'.
   c. Click the desired Segment ID. It will populate the Segment Field.



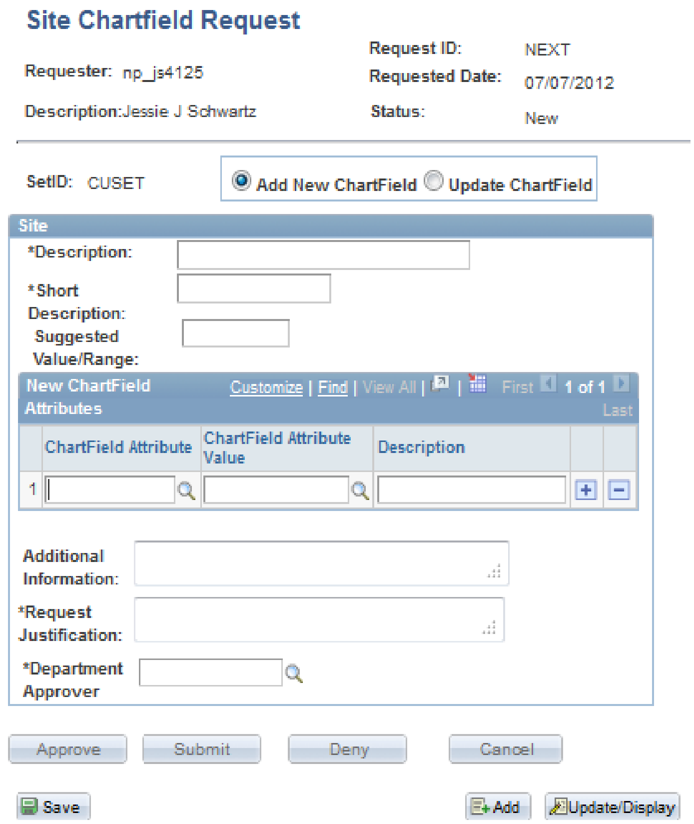
B. To inactivate a ChartField, or reactivate an inactive
C. ChartField, Select the appropriate status from the 'Request Status Change' drop down menu. The current status displayed under 'Effective Status'
D. will either say 'A' for active or 'I' for inactive.
E. To update any field, fill in the new value in the field to the right. You do not need to fill in all the values field, just the fields that need to be changed. This includes changing an existing ChartField attribute, just enter a new ChartField value and description.
F. If adding Attributes, use the Look Up Tool to choose an attribute. This section can be left blank. (See Requesting a New Segment I. for more information about ChartField attributes.
G. Fill in Request Justification (required field) and the Additional Information field if necessary. If you wish to make changes to the placement on the Segment Tree it should be indicated here.
H. Select UNI of Departmental Approver.
I. Click 'Save.' A Request ID is generated and displayed at the top of the page.



Site (this should be rarely requested)

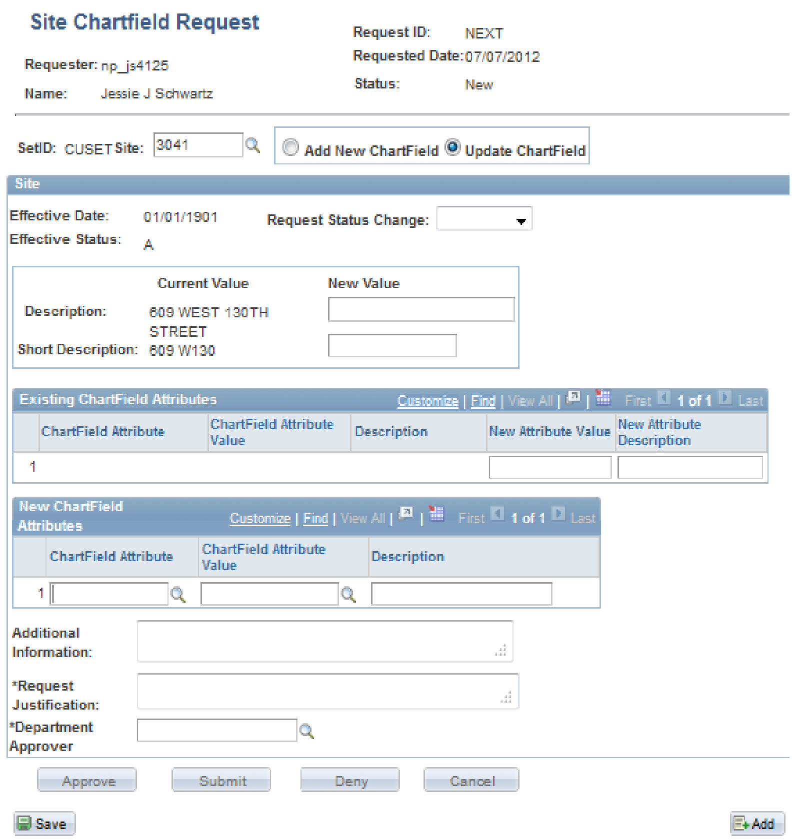
Requesting a new Site

A. Enter a Description and Short Description for the Site. Description can only be 30 characters; Short Description can only be 15 characters.
B. If you know the suggested value range, you can enter it here, but ultimately OTC will assign a value to the Site. This field can be left blank.
C. Select UNI of Departmental Approver.
D. Click 'Save.' A Request ID is generated and displayed at the top of the page.



Requesting an Update to an Existing Site

A. Enter the Site number you wish to update, or use the Look up tool and search by number or description. Current values for the Site should populate in the field to the left. Any existing attributes will populate in the 'Existing ChartField attributes" section.
   a. To use the Look Up Tool, click the magnifying glass next to a field.
   b. Enter information into one of the prompts: Site ID or Description, Click 'Look Up'.
   c. Click the desired Site ID. It will populate the Site Field.
B. To inactivate a ChartField, or reactivate an inactive ChartField, Select the appropriate status from the 'Request Status Change' drop down menu. The current status displayed under 'Effective Status' will either say 'A' for active or 'I' for inactive.
C. To update any field, fill in the new value in the field to the right. You do not need to fill in all the values field, just the fields that need to be changed. Fill in Request Justification (required field) and the Additional Information field if necessary. If you wish to make changes to the placement on the Site Tree it should be indicated here.
D. Click 'Save.' A Request ID is generated and displayed at the top of the page.



APPENDIX

The Function ChartField and How It Defaults from Other ChartFields

What is the Function ChartField?

- The Function ChartField drives functional expense reporting, which is the way information is shown for COB reporting and Financial Statement reporting.
- Functional expense reporting shows expenses by function such as Instruction or Research, rather than by natural classification such as Rent or Salaries.

Where it came from in FAS

- Various sources including Subcodes, Account Controls and Attributes on Subledger Accounts such as Revenue Source and Expense Code

Where it comes from in ARC

- Function is programmed to default from the usage of other ChartFields
- The ChartFields may or may not have "Function Default" attributes that a program in ARC reads to determine which Function ChartField to default to. The only ChartField that is REQUIRED to have the Function Default attribute populated is the Department ChartField
- The logic that is used to derive the Function from other ChartFields is as follows:
    1. Is there a default function attribute on Account? Yes = Use it, No = Look to the next ChartField
    2. Is there a default function attribute on Project? Yes = Use it, No = Look to the next ChartField
    3. Is there a default function attribute on Initiative? Yes = Use it, No = Look to the next ChartField
    4. Is there a default function attribute on Segment? Yes = Use it, No = Look to the next ChartField
    5. Is there a default function attribute on Department? Yes = Use it (this is the last resort)
- The Function Default attribute should only be added to a ChartField (other than Department) if the ChartField is ALWAYS used for the that Function (for example, a Project that funds many different types of Functions should NOT have a Function Default attribute).

Getting Help

Please contact the Finance Service Center
http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122