

The FSCM 9.2 Upgrade to PeopleSoft introduced a new functionality called Chartfield Request. This functionality allows an end user to request a chartfield be added to the configuration. The request is then routed through approvals before being automatically added to the configuration tables. This new process will maintain a clearer audit trail for new chartfields being added.

The following chart of accounts will be entered by Division of Accounts:

- 5 digit department with agency business unit
- Account with SetID of SHARE
- Fund with SetID of SHARE

The following chart of accounts will be entered by agency users under the roll of TN2_GL_AGENCY_GL_SPECIALIST

- UserCode – 6 digits
- Location – 5 digits with 1st two being County
- Program – 6 digits
- 10 digit department – new 10 digit departments must contain payroll and an attachment explaining the necessity for the new department

Creating Chartfield Requests

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > Chartfield Request > Add a New Value

User Code - Chartfield1

ChartField Request

Find an Existing Value | Add a New Value

Request ID: NEXT

SetID: SHARE

Field Name: CHARTFIELD1

Field Action: Add

Field Value: 000002

Add

Find an Existing Value | Add a New Value

1. On the Chartfield Request page – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click user code field to be added
5. Field Action – Click Add
6. Field Value – Enter the new chartfield value to be added = 6 digits
7. Click Add

Favorites ▾ Main Menu ▾ > Set Up Financials/Supply Chain ▾ > Common Definitions ▾ > Design ChartFields ▾ > Define Values ▾ > ChartField Request Home Sign out

ORACLE New Window | Help | Personalize Page

Request ID NEXT SetID SHARE
 Request Status Newly Created Field Name CHARTFIELD1
 Field Action Add Field Value 000002
 Telephone Email ID angela.warden@tn.gov

Core Information

Budgetary Only

*Effective Date 05/26/2016

*Status Active ▾

*Description test2

*Short Description test2

[Long Description](#)

[Attributes](#)

Business Justification

*Business Justification test2

[Attachments \(0\)](#)

▶ Request Comments
 ▶ Trees

Requester	Entered By	Entered Date/Time	
	Updated By	Updated Date/Time	

On the next screen – the following fields will default based on setup and populate the required fields –

8. Email ID – the users State email address will default
1. Core Information
 - Effective Date =
 - Status = Active
 - Description = 30 Characters
 - Short description = 10 Characters
 2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
 3. Click Save
 4. Request Action dropdown – Click submit for approval and click **Go**

After the user clicks **Go** the request will be routed to the Division of Accounts approver. The approver will review and either approve or deny the request. If the request is approved, the user code will be added into Edison. If denied, the request will be routed back to the user with comments on why it was denied. The user will either fix the issue from the approver’s comments or can cancel the request if needed. Cancelling a request is explained later in this manual.

There are 3 methods in approving a chartfield request that has been submitted (1) Business request approval (2) worklist and (3) Email

(1) Approving Chartfield Request Navigation through Business request approval

FSCM > Setup Financials/Supply Chain > Common Definitions > Business Request Configuration > Business Request Inquiry

Note – approver can review multiple requests at a time.

Business Request Approval

Manage Business Request Approval

Search Requests

To locate business requests that require your approval (or business requests that previously required your approval), edit the criteria fields and click the Search button.

Request ID: Requester:
SetID: 31614 Field Name: CHARTFIELD1
Field Action: Add Field Value:
*Approval Status: Pending Functional Area:

Exclude Blank Value

Comments

Select All / Deselect All

Business Requests Personalize | Find | First | 1-3 of 3 | Last

Select	Request ID	SetID	Field Name	Field Action	Field Value	Attachments (0)
<input checked="" type="checkbox"/>	0000000048	31614	CHARTFIELD1	Add	000003	Attachments (0)
<input type="checkbox"/>	0000000049	31614	CHARTFIELD1	Add	000004	Attachments (0)
<input type="checkbox"/>	0000000014	31614	CHARTFIELD1	Add	000001	Attachments (0)

Select All / Deselect All

(2) Approving Chartfield Request Navigation through approvers Worklist

FSCM >

Worklist

Worklist

Worklist for coure0911001: Courtney Tucker Jolly

AP Voucher Search

Detail View

Worklist Filters Feed

From	Date From	Work Item	Worked By Activity	Priority	Link		
Angela Warden	01/11/2018	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_31_SHARE_1901-01-01_N_0_FLD_REQUEST_ID:0000000023_RDC.RA.D.A.	Mark Worked	Reassign
Angela Warden	01/11/2018	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_33_SHARE_1901-01-01_N_0_FLD_REQUEST_ID:0000000020_RDC.RA.D.A.	Mark Worked	Reassign
Angela Warden	10/02/2017	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_19_SHARE_1901-01-02_N_0_FLD_REQUEST_ID:0000000004_RDC.RA.D.A.	Mark Worked	Reassign
Angela Warden	01/11/2018	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_36_SHARE_1901-01-01_N_0_FLD_REQUEST_ID:0000000053_RDC.RA.D.A.	Mark Worked	Reassign
Angela Warden	01/11/2018	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_37_SHARE_1901-01-01_N_0_FLD_REQUEST_ID:0000000024_RDC.RA.D.A.	Mark Worked	Reassign
Angela Warden	01/11/2018	Approval Routing	Approval Workflow	2-Medium	FieldRequestApproval_35_SHARE_1901-01-01_N_0_FLD_REQUEST_ID:0000000022_RDC.RA.D.A.	Mark Worked	Reassign

Request ID 0000000020 SetID 31614 Copy

Request Status Pending Approval Field Name CHARTFIELD1

Field Action Update 382412

Telephone Email ID angela.warden@tn.gov

Core Information

Budgetary Only

*Effective Date 01/10/2018

*Status Active

*Description Breaking Ground--ABW

*Short Description BGround

Long Description

Attributes

Business Justification

*Business Justification changed descr

Attachments (0)

Request Comments

Trees

Approval Comments

Request Action Approve Go View Approval Flow

Requester angeb0705001 Angela Warden

Entered By angeb0705001 Angela Warden Entered Date/Time 01/10/2018 10:50AM

Updated By angeb0705001 Angela Warden Updated Date/Time 01/11/2018 2:36PM

Save Return to Search Notify

(3) Approving Chartfield Request Navigation through Email link

You can navigate directly to the Field Request entry page for more information by clicking the link below.

[https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_REQUEST.FLD_REQ_APP
ROVAL.GBL?Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000169](https://sso-
uat.edison.tn.gov/psp/pauat/EMPLOYEE/ERP/c/MANAGE_FIELD_REQUEST.FLD_REQ_APP
ROVAL.GBL?Page=FLD_REQ_APPROVAL&Action=U&FLD_REQUEST_ID=000000169)

Updating Existing Chartfield Requests

There are two ways to update an existing chartfield (1) Chartfield request and add a new value (2) Chartfield request and copy function.

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > **Chartfield Request > Add a New Value**

1. On the Chartfield Request page – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click user code field to be added
5. Field Action – Click Update
6. Field Value – Enter the existing chartfield value to be changed and /or inactivated
7. Click Add

ChartField Request

Request ID

SetID

Field Name

Field Action

Field Value

On the next screen – the following fields will default based on setup and populate the required fields –

8. Email ID – the users State email address will default
 1. Core Information
 - Effective Date =
 - Status = Active / If chartfield is being inactivated – choose inactive
 - Description = 30 Characters
 - Short description = 10 Characters
 2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
 3. Click Save

Request ID 000000020 SetID 34301 Copy

Request Status Newly Created Field Name CHARTFIELD1

Field Action Update 000394

Telephone Email ID mitzi.martin@tn.gov

Core Information

*Effective Date 04/19/2018

*Status Active

*Description Acupuncturists

*Short Description Acupuncter

Business Justification

*Business Justification change to active

Attachments (0)

▶ Request Comments

▶ Trees

Request Action Go

Requester

Entered By mitz1015001 Mitzi Martin Entered Date/Time 04/19/2018 10:33AM

Updated By mitz1015001 Mitzi Martin Updated Date/Time 04/19/2018 10:33AM

Save Notify Add Update/Display

4. Request Action dropdown – Click submit for approval and click Go

Request ID 000000020 SetID 34301 Copy

Request Status Newly Created Field Name CHARTFIELD1

Field Action Update 000394

Telephone Email ID mitzi.martin@tn.gov

Core Information

*Effective Date 04/19/2018

*Status Active

*Description Acupuncturists

*Short Description Acupuncter

Business Justification

*Business Justification change to active

Attachments (0)

▶ Request Comments

▶ Trees

Request Action **Submit for Approval** Go

Requester

Entered By mitz1015001 Mitzi Martin Entered Date/Time 04/19/2018 10:33AM

Updated By mitz1015001 Mitzi Martin Updated Date/Time 04/19/2018 10:33AM

Save Notify Add Update/Display

Navigation – FSCM > Set Up Financials/Supply Chain > Common Definitions > Design Chartfields > Define Values > **Chartfield Request > Add a New Value**

1. On the Chartfield Request page – Click the tab “Add a new value”
2. Request ID: NEXT – this will pre-populate and will be grayed out
3. SETID – Enter Agency BU
4. Field Name – Click user code field to be added
5. Field Action – Click Update
6. Field Value – Enter the existing chartfield value to be changed and /or inactivated
7. Click Add

On the next screen – click **COPY** –

8. Email ID – the users State email address will default

The screenshot shows the 'Chartfield Request' page. At the top, there are fields for Request ID (000000021), Request Status (Newly Created), Field Action (Update), Telephone, SetID (34301), Field Name (CHARTFIELD1), and Field Value (200005). A 'Copy' button is visible next to the SetID field. Below these are sections for 'Core Information' (Effective Date, Status, Description, Short Description) and 'Business Justification'. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

9. Choose Update and the Field Value to be changed and or inactivated on the Request Copy box.
10. Click OK.

This screenshot is identical to the previous one, but with a 'Request Copy' dialog box open in the foreground. The dialog box contains the following information: 'Copy to Request ID: NEXT', '*Field Action: Update', and 'Field Value: 200006'. There are 'OK' and 'Cancel' buttons at the bottom of the dialog box.

On the next screen – the following fields will default based on setup and populate the required fields –
12. Email ID – the users State email address will default

1. Core Information
 - Effective Date =
 - Status = Active / If chartfield is being inactivated – choose inactive
 - Description = 30 Characters
 - Short description = 10 Characters
2. Business Justification
 - Business justification field = purpose for new field
 - Add attachments if necessary
3. Click Save
4. Request Action dropdown – Click submit for approval and click **Go**

Request ID	000000023	SetID	34301	Copy
Request Status	Newly Created	Field Name	CHARTFIELD1	
Field Action	Update		200007	
Telephone	<input type="text"/>	Email ID	<input type="text" value="mitzi.martin@tn.gov"/>	

Core Information

*Effective Date	<input type="text" value="01/01/1901"/>
*Status	<input type="text" value="Active"/>
*Description	<input type="text" value="Health Statistics"/>
*Short Description	<input type="text" value="Statistics"/>

Business Justification

*Business Justification	<input type="text" value="tit"/>
Attachments (0)	

▶ **Request Comments**

▶ **Trees**

Request Action	<input type="text" value="Submit for Approval"/>	Go
Requester		
Entered By	JAYS0104001 Jay Gilhooly2	Entered Date/Time 04/19/2018 11:14AM
Updated By	JAYS0104001 Jay Gilhooly2	Updated Date/Time 04/19/2018 11:14AM

[Save](#) [Return to Search](#) [Notify](#) [Add](#) [Update/Display](#)