

Chartfield System Enhancement List

Contracts and Grants

Effective 04/2015

1. Copy Feature

- The Copy link has been added to the Header page
 - To copy a request, click the Copy link
 - A secondary screen will appear.
 - The New Chartfield Request ID and Date fields will auto-populate with default values but can be changed if desired.
 - Click the OK button to create the new request or the Cancel button to return to the old request.
 - Most of the fields will copy, but they need to be reviewed and any necessary additions/changes made prior to submitting the request for approvals.
 - The new request will follow the standard established workflow path.

2. Ad Hoc Functionality -- Add Approvers and/or Reviewers to the approval workflow

- The Initiator or Approver can insert additional approvers or reviewers AFTER the request workflow has been established.
- An Ad Hoc Approver or Reviewer can be inserted at any point within the workflow routing prior to the "Central Office Processor" level.
- To insert an Ad Hoc Approver or Reviewer click the '+' icon in the approval path on the Approval page.
 - A secondary screen will appear for entry of the User ID of the Ad Hoc Approver or Reviewer
 - **Remember:** Select the appropriate Ad Hoc Role
 - Click the Insert button to insert the Approver/Reviewer or the Cancel button to return to the request.
 - You must click the 'Save Workflow Changes' button to save the changes *prior to* submitting the request for approval.
 - An email will be generated when the request reaches the Ad Hoc Approver/Reviewer level.
 - A worklist item (Work Item = Approval Routing) will appear on the Ad Hoc Approver worklist and action is required for the request to continue in the workflow process.
 - No worklist item will appear on the Ad Hoc Reviewer worklist
 - No action is required for the request to continue in the workflow process.

3. Request Status field has been added to Search Criteria