



Financial System

Chartfield Request - C&G Contracts & Grants Roles 9.1 Financial System

Chartfield Request Processing

Under specific criterion, segments are established to separately account for expenditures related to a project. Historically, segments were established by the submission of a BA-148 form via the Prior Approval Request (PAR) System.

A segment can be established for the following circumstances:

1. To split award funds between:

- Various PI's ***within the same college***
- Various PI's in ***different colleges***.

❖ Notes:

- ✓ To exercise use of this functionality, all Principal Investigators (PI's) must be already name in the award.
- ✓ This **process** is **not** to be **used to obtain approval** to add additional PI's to a project not originally named in the award.
- ✓ A request to add additional PI's to a project must be handled through the PAR system.
 - Upon approval, submit a request through the newly designed Chartfield Request System to establish a project segment.

2. Program Income

- The segment is needed to account for program income. The segment will be used to receive program income deposits. This option is generally reserved for projects using the 'Match Method' described above. ***Please note, these project can not be mapped to a Prime. These projects must be mapped to itself.***

The Chartfield Request System allows the requestor to:

- Request a new Project Segment on most fund groups

*Fund groups include State Appropriated, Agency, Auxiliary, Debt Service, Foundations, **Contracts & Grants**, F & A receipts, Gift and Loan and University Endowments*

- Request a new Department ID/Code (*i.e.*, OUC)
- Request a modification to an existing Project Segment
- Request modification to an existing Department ID/Code
- Request the inactivation of a Project Segment
- Request the inactivation of a Department ID/Code

For Contracts and Grants Projects, the Chartfield Request System may ONLY be used to request a new segment (ADD), to inactivate an existing segments (INACTIVATE) OR to change information/attributes on an existing segment (MODIFY).

Chartfield Request Roles:

- CF Initiator/Requestor = Person Initiating the request
- CF Request Department Approver = College Research Officer or designee
- CF Request C&G Approver = Fiscal Manager or designee
- CF Request C&G Processor = Account Setup Specialist or designee

To begin the process, initiate the request in Financials using the Chartfield Request System. An Initiator only has access to request a Segment within their own OUC range.

• **CF Request System**

Find an Existing Value Add a New Value

Business Unit: NCSU1
CF Request ID: NEXT
CF Request Date: 02/20/2012 [31]
CF Request Type: Segment
CF Request Action: Add
CF Request Fund Group: Contracts and Grants

Add

- The justification for the request, supporting documentation and budgets should be attached and made available for review by all approvers.

Note: The budget/funds for the segment must exist within the Prime, at the time of the request.

Office of Contracts & Grants Processing:

Once a request has been routed for review and approval by the Central Office, C&G Approver will get a system generated email notification.

There are three (3) ways to navigate to the pending request.

1. Press the link within the system generated email

Email generated and sent to Central Office for approval once submitted by Dept Approver.

From: <yesseniam@hotmail.com>
To: <yessy_mendoza@ncsu.edu>, <ncsu.eapro@gmail.com>, <ncsu.eapro@gmail.com>, ...
Date: 11/21/2011 10:20 AM
Subject: Approval is requested for Chartfield Request "0000000036" Dated '2011-11-21'

A request has been generated that requires your attention.

Request ID: 0000000036
 Request Date: 2011-11-21
 Type: Segment
 Fund Group: 16030 - Academic Affairs
 Action: Add
 Fiscal Mgr:

You can navigate directly to the request entry page by clicking the link below.

https://fo91qa.acs.ncsu.edu/psp/FO91QA/EMPLOYEE/PFO9100A/c/NC_REQUEST_NC_REQUEST_GBL?Page=NC_CF_HEADER&Action=U&BUSINESS_UNIT=NCSU1&NC_CF_ID=0000000036&NC_CF_DT=2011-11-21

Sample Email

It is imperative the Approver pays VERY close attention to the Fund Group associated with the approval request.

2. Search for request from Chartfield Request Page

Navigation:

Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Enter the search criteria on the **Find and Existing Value** tab.

Note: The more information entered will help limit the search results.

3. Search for the request from the Worklist.

The **approver** has the ability to narrow the worklist by filtering the information to see only Chartfield (CF) request or simply select from the complete list of worklist items.

Worklist for TBBURREL: Thelia B Burrell

From	Date From	Work Item	Priority	Worked By Activity	Link
Arlene C Mabry	02/16/2012 3:23:53PM	CF Request CG Approval	3-Low	Approval Workflow	CFRequestApproval_943 CFRequestApproval_2012-01-01 N 0 BUSINESS_UNIT=NCSU1 NC CF ID:0000000110 NC CF DT:2012-02-16 RDC:RA.0.A
Arlene C Mabry	02/16/2012 3:22:21PM	CF Request CG Approval	3-Low	Approval Workflow	CFRequestApproval_942 CFRequestApproval_2012-01-01 N 0 BUSINESS_UNIT=NCSU1 NC CF ID:0000000109 NC CF DT:2012-02-16 RDC:RA.0.A

Review the request for accuracy

Header | Contracts & Grants | Approval | Comments

Unit: NCSU1 CF Request ID: 000000074 CF Request Date: 12/15/2011

CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

CF Request Status: Submitted for Approval Proposed ID: [] [Print](#) [Chartfield Inquiry](#)

Effective Date: 12/15/2011 [B] Project Reference: 052020 [] [Delete](#)

Check for new Project Reference [Attachments \(0\)](#)

Request Justification:
and Modification Details: [test]

Short Description: []

Long Description: [test]

The **Header** Panel:

The Chartfield C&G Approver is responsible for ensuring the information entered by the Initiator and approved by the Departmental Approver are within the terms of the agreement and allowable according to established policy and procedures for the Business Unit, Office of Contracts & Grants and the University. The approver has the ability to correct/edit the information.

The Departmental Approver must verify the validity of the information in the following fields:

- CF Request Status says **Submitted for approval**.
- The Effective Date
- The Project Reference
- The Justification
- The Long Description
- Enter Auxiliary, Center/Institute information (*if applicable*)
- Department ID
- Responsible Person(s)
- Enter the Short Description
- Enter the Program & Class Codes

The Short Description field is available beginning at the Departmental Approver level. This field is not available at the Initiator level. A Departmental Approver may enter the desired short description.

If the award is reportable as an Auxiliary, Center/Institute, the Departmental Approver must enter the appropriate Auxiliary Code and select the type of Auxiliary.

Note: The Office of Contracts & Grants is responsible for the final review of information prior to setup.

Reportable as Auxiliary, Center/Institute? If Yes, please specify name of Auxiliary, Center/Institute:

Auxiliary Code: Auxiliary Type:

*Fund Code: 91000 *Department: Program: Class:

List the Name or Title of the Primary Responsible Person on the first row and insert additional rows for other authorized persons.

Responsible/Authorized Persons						
Name	Title	Department	Email ID	Campus Box	Phone	
<input type="text" value="Brasfield,Julie A."/>	<input type="text"/>	<input type="text" value="464001"/>	<input type="text" value="ncsu.epro@gmail.com"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

- Notes:
 - The Department ID must be 6 digits.
 - The C&G Processor is responsible for the completion of the Program & Class fields.
- Verify the Responsible/Authorized Persons information.
 - The approver must confirm whether the PI was listed in the original award
 - If the PI was NOT listed in the award as contributor to the project, deny the request.
 - If the PI was listed in the award and the information is correct and valid, and meets all established procedures governing the processing of a segment, the request may be considered for approval.

The Contracts & Grants Panel:

Verify all information entered by the Initiator and approved by the Departmental Approver is valid and correct according to established policy and procedures for the Business Unit, Office of Contracts & Grants and University.

Header **Contracts & Grants** Approval Comments

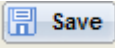
Unit: NCSU1 CF Request ID: 0000000074 CF Request Date: 12/15/2011

CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

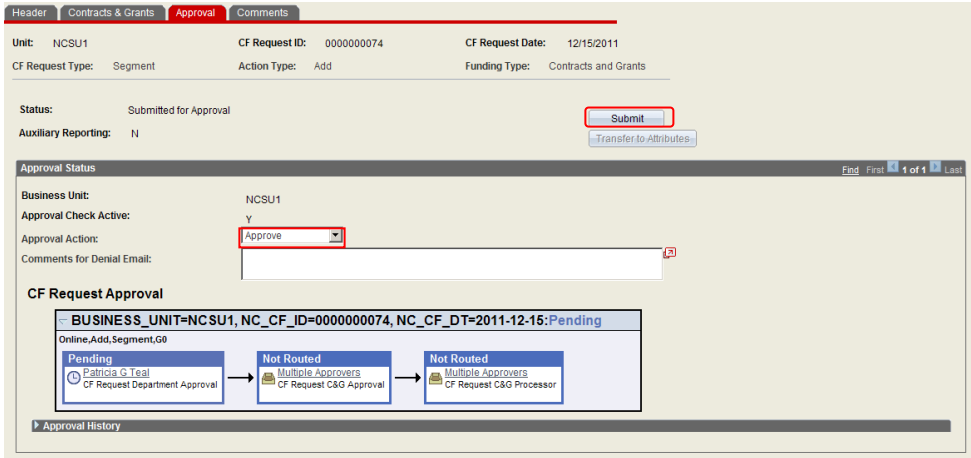
Sponsor Name	Proposal Number	
<input type="text" value="ABC CORPORATION"/>	<input type="text" value="2011-1111"/>	
Segment Award Amount	Project Start Date	Project End Date
<input type="text" value="2500000.00"/>	<input type="text" value="04/01/2010"/>	<input type="text" value="03/31/2012"/>
Cost Share Amount	Budget Begin Date	Budget End Date
<input type="text"/>	<input type="text" value="05/01/2011"/>	<input type="text" value="12/31/2011"/>

The **Approval** Panel:

If the request is valid and all of the information is correct according to established policies and procedures for the Business Unit, Office of Contracts & Grants and the University, the approver may consider this request for approval.

If changes were processed during the review process, it is imperative you press the **SAVE** button  prior to submitting request. Due to the new workflow, the performance is improved when the transaction is saved prior to submitting.

Verify the Approval Action says **Approve** and press **Save** and then **Submit** button.



Header: Contracts & Grants **Approval** Comments

Unit: NCSU1 CF Request ID: 000000074 CF Request Date: 12/15/2011
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Status: Submitted for Approval

Auxiliary Reporting: N

Approval Status Find First 1 of 1 Last

Business Unit: NCSU1
Approval Check Active: Y
Approval Action: Approve
Comments for Denial Email:

CF Request Approval

BUSINESS_UNIT=NCSU1, NC_CF_ID=000000074, NC_CF_DT=2011-12-15: Pending

Online.Add.Segment.G0

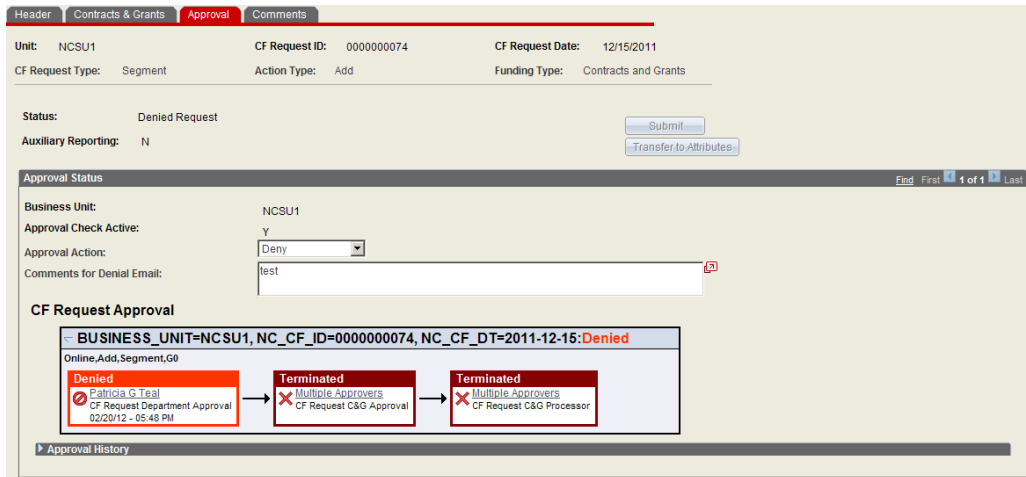
Pending Patricia G Teal CF Request Department Approval → Not Routed Multiple Approvers CF Request C&G Approval → Not Routed Multiple Approvers CF Request C&G Processor

Approval History

Key information necessary for the approval decision may be found on the Comments Panel or as an attachment to the request. The Department and/or College Units are required to include all necessary documentation for the approval process. This includes, but is not limited to, the Lead PI's approval email (*if applicable*), the approved segment budget, and other relevant documentation. If the required documentation is not provided, the request will be denied.

If the request should **not** be processed, the C&G Approver has the option to deny the request.

- o An explanation for the denial is required.



Header: Contracts & Grants **Approval** Comments

Unit: NCSU1 CF Request ID: 000000074 CF Request Date: 12/15/2011
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Status: Denied Request

Auxiliary Reporting: N

Approval Status Find First 1 of 1 Last

Business Unit: NCSU1
Approval Check Active: Y
Approval Action: Deny
Comments for Denial Email: test

CF Request Approval

BUSINESS_UNIT=NCSU1, NC_CF_ID=000000074, NC_CF_DT=2011-12-15: Denied

Online.Add.Segment.G0

Denied Patricia G Teal CF Request Department Approval 02/20/12 - 05:45 PM → Terminated Multiple Approvers CF Request C&G Approval → Terminated Multiple Approvers CF Request C&G Processor

Approval History

Denying a Request:

Note:

- The denial explanation will be included in the denial email.
- The action of denying a request is similar to recycling a request.
- Once a request is denied, it is returned to the requestor.
- The requestor/Initiator can resubmit the request and begin the approval routing process.

Header | Contracts & Grants | **Approval** | Comments

Unit: NCSU1 CF Request ID: 0000000074 CF Request Date: 12/15/2011
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Status: Denied Request **Re-Submit**
Auxiliary Reporting: N Submit
Transfer to Attributes

The Comments Panel:

The user(s) may include comments or information about the request on the comment panel. This information may be useful in review and approval of the request. If necessary, the user may enter information in several comments boxes.

Header | Contracts & Grants | Approval | **Comments**

Unit: NCSU1 CF Request ID: NEXT CF Request Date: 02/20/2012
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Comments (up to 254 characters per comment)

Entered by:
1 [] + -

To add or remove a comment box, press the 

To view attachments:

Press the **Attachments (0)** hyperlink to attach documents. *This function is accessible on the **Header** panel*

Attachments should include necessary documentation to support the establishment of the segment(s). This includes, but is not limited to, the Lead PI's approval email, the approved segment budget, and other relevant documentation. The acceptable file forms for attachments are Word, Excel, PDF and standard text files.

- Campus Users have been cautioned against attaching copies of reports that can be easily regenerated in Financials, such as WRS report printouts, Journals, IDT printouts, attribute screenshots, etc.

- Campus Users have been cautioned against attaching oversized files (i.e., an extremely large excel file).

To **Attach** documents, **Print** Requests or **Delete** Requests:

These functions are accessible on the **Header** panel

The screenshot shows a header panel with the following elements:

- Tabs: Header (selected), Contracts & Grants, Approval, Comments
- Unit: NCSU1
- CF Request ID: NEXT
- CF Request Date: 02/20/2012
- CF Request Type: Segment
- Action Type: Add
- Funding Type: Contracts and Grants
- CF Request Status: New Request
- Effective Date: 02/20/2012
- Project Reference: [input field]
- Buttons: Print, Delete, Attachments (0)
- Link: Chartfield Inquiry
- Checkbox: Check for new Project Reference

1. Press the **Print** hyperlink to print the request. A PDF copy of the request will open in another window (*See image below*). If the window does not automatically open, verify the status of the pop-up blocker.

The screenshot shows a window titled "CHARTFIELD REQUEST REPORT" with the following data:

Unit:	NCSU1	CF Request ID:	000000084	CF Request Date:	01/31/2012
CF Request Type:	Segment	Action Type:	Add	Funding Type:	Contracts and Grants
CF Request Status:	Approved and Completed	Proposed ID:	559991		
Effective Date:	01/31/2012	Project Reference:	052013		

Request Justification: PTW TEST

Short Description: TEST
Long Description: TEST

Reportable as Auxiliary, Center/Institute? N
If Yes, name of Auxiliary, Center/Institute:
Auxiliary Code: Auxiliary Type:

Fund Code: 91000 Department: 100107 Program: 110 Class: 503

2. Open the desired request to be deleted. Press the **Delete** hyperlink to delete the request.

Note: Confirm you have opened the CORRECT request. You will NOT get a PRIOR confirmation to delete request.

When the request has been deleted, the user will get a confirmation message indicating the request **has been deleted**.

The screenshot shows a "Message" dialog box with the following text:

Chartfield Request 000000084 has been deleted. (20820,56)

OK

3. Press the **Attachments (0)** hyperlink to attach documents.

Attachments should include necessary documentation to support the establishment of the segment(s). This includes but is not limited to the communications regarding the establishment of the segment(s). Communications include the Lead PI's approval email, the approved segment budget, and other relevant documentation.

- The acceptable file forms for attachments are Word, Excel, PDF and standard text files.
- DO NOT attach copies of reports that can be easily regenerated in Financials, such as WRS report printouts, Journals, IDT printouts, attribute screenshots, etc.
- DO NOT attach oversized files (i.e., an extremely large excel file).

For Modification Requests:

Review the justification or content of the request (i.e., list of items to be modified).

Upon approval, press the **submit** button.

The screenshot shows a web application interface for a request modification. The interface is divided into several sections. At the top, there is a header with three tabs: 'Header' (selected), 'Approval', and 'Comments'. Below the header, there are several fields and buttons. The 'Unit' is 'NCSU1', 'CF Request ID' is '0000000120', and 'CF Request Date' is '02/21/2012'. The 'CF Request Type' is 'Segment', 'Action Type' is 'Modify', and 'Funding Type' is 'Contracts and Grants'. There is a 'Project/Department' field with the value '551551'. There are links for 'Print', 'Chartfield Inquiry', 'Delete', and 'Attachments (0)'. A 'Request Justification and Modification Details' section contains a text area with the text 'test! this is a test!' and 'do it because I said so'.

The Fiscal Manager is responsible for processing the following requested edits:

General/Chartfield Panel

- Responsible Person field
- Project Dates
- Short Description
- Long Description
- Stimulus Reporting Frequency

Contracts and Grants Panel

- All attributes except the F&A box

Responsible Persons Panel

- Changes to associated PI's should be processed through the PAR system and processed in SPARCS. Once the change is processed in RADAR, the information will feed to financials.

For Inactivation Requests:

Review the justification or content of the request (i.e., list of items to be modified). Project must meet internal C&G guidelines for inactivation.

Upon approval, press the **submit** button.

The Fiscal Manager is responsible for:

- Final review and processing of the project closeout
- Setting the destroy date
- Updating the attributes
- Inactivating the project

Header	Approval	Comments
Unit: NCSU1	CF Request ID: 0000000109	CF Request Date: 02/16/2012
CF Request Type: Segment	Action Type: Inactivate	Funding Type: Contracts and Grants
CF Request Status: Submitted for Approval	Project/Department: 538060	Print Chartfield Inquiry
Effective Date: 02/16/2012		Delete
Request Justification and Modification Details:	Attachments (0)	
	TBB TEST DO IT NOW SO THAT MY PI WILL STOP SPENDING MONEY	

The C&G Processor:

Once a request has been routed for review and approval, the C&G Processor will get a system generated email notification.

There are three (3) ways to navigate to the pending request.

1. Press the link within the system generated email

Email generated and sent to Central Office for processing once submitted by CO Approver

Sample Email

From: <yessy_mendoza@ncsu.edu>
To: <yessy_mendoza@ncsu.edu>, <ncsu.epro@gmail.com>, <ncsu.epro@gmail.com>, ...
Date: 11/21/2011 10:25 AM
Subject: Approval is requested for Chartfield Request "0000000036" Dated '2011-11-21'

It is imperative the Approver pays VERY close attention to the Fund Group associated with the approval request.

A request has been generated that requires your attention.

Request ID: 0000000036
 Request Date: 2011-11-21
 Type: Segment
 Fund Group: 16030 - Academic Affairs
 Action: Add
 Fiscal Mgr:

You can navigate directly to the request entry page by clicking the link below.

https://fo91qa.acs.ncsu.edu/psp/FO91QA/EMPLOYEE/PFO910QA/c/NC_REQUEST.NC_REQUEST.GBL?Page=NC_CF_HEADER&Action=U&BUSINESS_UNIT=NCSU1&NC_CF_ID=0000000036&NC_CF_DT=2011-11-21

2. Search for request from Chartfield Request Page

Navigation:

Main Menu > Financial Systems > Journals & Chartfield Maint. > Chartfield Request

Enter the search criteria on the **Find and Existing Value** tab.

Note: The more information entered will help limit the search results.

3. Search for the request from the Worklist.

The **approver** has the ability to narrow the worklist by filtering the information to see only Chartfield (CF) request or simply select from the complete list of worklist items.

Navigation: Main Menu > Financial Systems > Worklist > Worklist Details

From	Date From	Work Item	Priority	Worked By Activity	Link
Arlene C Mabry	02/16/2012 3:23:53PM	CF Request CG Approval	3-Low	Approval Workflow	CFRequestApproval_943_CFRRequestApproval_2012-01-01-11-0-BUSINESS_UNIT:NCSU1 NC CF ID:00000000110 NC CF DT:2012-02-16 RDC:RA,0,A
Arlene C Mabry	02/16/2012 3:22:21PM	CF Request CG Approval	3-Low	Approval Workflow	CFRequestApproval_942_CFRRequestApproval_2012-01-01-11-0-BUSINESS_UNIT:NCSU1 NC CF ID:00000000109 NC CF DT:2012-02-16 RDC:RA,0,A

Verify the Action Type. This action determines the required action.

The CF Request Status should equal **Ready for attributes**

Unit: NCSU1 CF Request ID: 0000000073 CF Request Date: 12/15/2011
CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

CF Request Status: **Ready for Attributes** Proposed ID: [Print](#) [Chartfield Inquiry](#)
Effective Date: 12/01/2011 Project Reference: 052020 [Delete](#)
 Check for new Project Reference [Attachments \(0\)](#)

Request Justification:
and Modification Details: TEST

Short Description:
Long Description: TEST

Enter the assigned Project ID in the Proposed ID field. This field is required to approve and transfer data to the attribute panel.

Verify or Add the Short Description

The short description field must be complete to transfer information into the attribute panel for completion of the Project Segment setup process. The format should be consistent with established procedure for Project ID Setup. This field is required to transfer data to the attribute panel.

The format should be consistent with the following

- For projects assigned to all colleges **except** CALS, the short description should be an abbreviation of the long title. The maximum character length is 30 characters.
- For all projects assigned to **CALS**, the short description equals the sponsoring agency name. The format is ALL Caps.

*Fund Code: 91000 *Department: 019701 Program: Class:
List the Name or Title of the Primary Responsible Person on the first row and insert additional rows for other authorized persons.

Name	Title	Department	Email ID	Campus Box	Phone
Brasfield, Julie A.		464001	ncsu.epro@gmail.com		

Verify a Principal Investigator name is listed.

Verify or Enter the Program and Class associate with the Prime/Parent. These fields are required to approve and transfer data to the attribute panel.

Once all required information has been verified or entered, transfer attributes to continue the Project ID process.

Header: Contracts & Grants | **Approval** | Comments

Unit: NCSU1 CF Request ID: 000000073 CF Request Date: 12/15/2011
 CF Request Type: Segment Action Type: Add Funding Type: Contracts and Grants

Status: **Ready for Attributes**

Auxiliary Reporting: N

Approval Status

Business Unit: NCSU1
 Approval Check Active: Y
 Approval Action: Approve
 Comments for Denial Email:

CF Request Approval

BUSINESS_UNIT=NCSU1, NC_CF_ID=000000073, NC_CF_DT=2011-12-15: Pending

Online.Add.Segment.Go

Approved → Approved → Pending

Approved: Patricia O. Teal, CF Request Department Approval, 12/09/11 - 11:15 AM
 Approved: Thelma Blackburn Burrell, CF Request C&G Approval, 12/09/11 - 11:22 AM
 Pending: Multiple Approvers, CF Request C&G Processor

Approval History

The status of the request will then change to **approved and completed**.

The C&G Processor will automatically be transferred to the C&G Attribute Panels in Project Maintenance.

General/Chartfields | Foundations/Endowments | Contracts & Grants | Responsible Persons | CI | Facilities | Comments

SetID: SHARE Project ID: 555551 Project/Grant Type: Project Segment Service Center Rates

General/Chartfields Find | View All First 1 of 1 Last

'Effective Date: 12/01/2011 'Effective Status: Active Project Reference: 052020 'Central Office Owner: Contracts & Grants Office

Responsible Person/Title: BRASFIELD, JULIE A. Description: Project Start Date: 04/01/2010 Project End Date: 03/31/2012

Long Description: TEST

Chartfield Information

'Fund Code	'Department	'Program	'Class	'NCAS Fund	'Trust Fund Code	'Exempt Trust Status
91000	019701	110	501	0210	21	0

The C&G Processor is responsible for verifying all attributes transferred properly and for completion of other attributes necessary for the completion of the Project ID Setup.

The NCAS, Trust Fund Code and Exempt Trust Status will automatically populate based on information entered during the Chartfield Request System processing.

The Fiscal Manager will be determined by the GL/Map Code listed in the request.

General/Chartfields | Foundations/Endowments | **Contracts & Grants** | Responsible Persons | CI | Facilities | Comments

SetID: SHARE Project ID: 555551 Project/Grant Type: Project Segment

Contracts and Grants Find | View All First 1 of 1 Last

Effective Date: 12/01/2011 Sponsor Name: TBD Sponsor Code: CFDA Nbr: 'Prime/Sub: +

'Fiscal Manager: CYNTHIA MARTIN Proposal Nbr: 2012-1111 Document Number: Pending Ext: +

Award Information

Award Amount: 25.00 Number: Type: Approp Limit: +

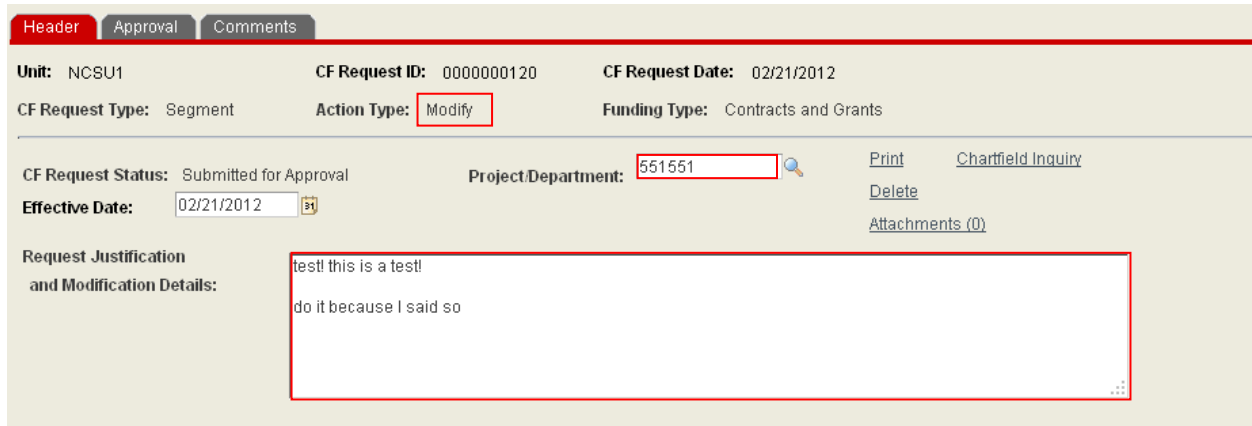
Budget Dates **File Retention Information**

Begin: 04/01/2010 End: 03/01/2012 Do Not Destroy Destroy Date: Destroyed Date: +

For Modification Request:

The request has been reviewed and approved by the Fiscal Manager.

Enter the required edits and press the **submit** button. This will finalize the request.



Header | Approval | Comments

Unit: NCSU1 CF Request ID: 0000000120 CF Request Date: 02/21/2012
CF Request Type: Segment Action Type: **Modify** Funding Type: Contracts and Grants

CF Request Status: Submitted for Approval Project/Department: 551551 [Print](#) [Chartfield Inquiry](#)
Effective Date: 02/21/2012 [Delete](#)
[Attachments \(0\)](#)

Request Justification and Modification Details:

test! this is a test!
do it because I said so

The C&G Processor is responsible for processing the following requested edits:

Press the **submit** button

General/Chartfield Panel

- Effective Date change
- General Information Box information
- Auxiliary Box information
- Trust Fund
- Exempt Code
- F&A Code
- Stimulus Code

- Changes and corrections to the Service Center Information box should be processed by Shelia Fisher only.

Contract and Grants Panel

- F&A Information box

For Inactivation Requests:

The request has been reviewed and approved by the Fiscal Manager.

The C&G Processor is responsible for:

- Final review of the project status
- Final review of the destroy date attributes
- Filing the project with other Inactive files

Upon completion of the review process, press the **submit** button. This will finalize the request.

Header	Approval	Comments
Unit: NCSU1	CF Request ID: 0000000109	CF Request Date: 02/16/2012
CF Request Type: Segment	Action Type: Inactivate	Funding Type: Contracts and Grants
CF Request Status: Submitted for Approval	Project/Department: 538060	Print Chartfield Inquiry
Effective Date: 02/16/2012		Delete
Request Justification and Modification Details:	Attachments (0)	
	TBB TEST DO IT NOW SO THAT MY PI WILL STOP SPENDING MONEY	

An approved and completed request:

When the request has been approved through the various levels and the information transferred to the attribute panel for Project ID setup, the status will be changed to **approved and completed**.

Header	Contracts & Grants	Approval	Comments
Unit: NCSU1	CF Request ID: 0000000084	CF Request Date: 01/31/2012	
CF Request Type: Segment	Action Type: Add	Funding Type: Contracts and Grants	
CF Request Status: Approved and Completed	Proposed ID: 559991	Print	Chartfield Inquiry
Effective Date: 01/31/2012	Project Reference: 052013	Delete	
Request Justification:	<input type="checkbox"/> Check for new Project Reference		
and Modification Details:	PTW TEST		
Short Description:	TEST		
Long Description:	TEST		
Attachments (0)			

At this point, no additional updates may be processed on the request.

Search Results

View All First 1-17 of 17 Last

Business Unit	CF Request ID	CF Request Date	CF Request Type	CF Request Action	CF Request Fund Group	User ID	Project ID	Department
NCSU1	0000000076	12/15/2011	Segment	Inactivate	C&G	Approved KAMORITZ	552100	(blank)
NCSU1	0000000078	12/16/2011	Segment	Inactivate	C&G	Approved KAMORITZ	520003	(blank)
NCSU1	0000000075	12/15/2011	Segment	Inactivate	C&G	Approved KAMORITZ	552020	(blank)
NCSU1	0000000085	01/31/2012	Segment	Modify	C&G	Approved ACMABRY	559991	(blank)
NCSU1	0000000084	01/31/2012	Segment	Add	C&G	Approved ACMABRY	559991	(blank)
NCSU1	0000000110	02/16/2012	Segment	Modify	C&G	Approved ACMABRY	538003	(blank)
NCSU1	0000000119	02/20/2012	Segment	Add	C&G	New BBCONOVE	(blank)	(blank)
NCSU1	0000000077	12/16/2011	Segment	Add	C&G	New KAMORITZ	(blank)	(blank)
NCSU1	0000000118	02/20/2012	Segment	Add	C&G	New BBCONOVE	(blank)	(blank)
NCSU1	0000000111	02/16/2012	Segment	Add	C&G	Ready ACMABRY	559992	(blank)

When the status of the request is **Approved** it has been routed through the entire process.

The Requestor/Initiator will receive a final email indicating the approved and completed transaction. *Note: The assigned Segment Project ID will be included in the email.*

Email generated and sent to Chartfield Requestor/Initiator once it has been setup and submitted for approval:

From: <yessy_mendoza@ncsu.edu>
To: <yessy_mendoza@ncsu.edu>
Date: 11/21/2011 10:26 AM
Subject: Chartfield Request "0000000036" Dated "2011-11-21" has been "Approved" and Completed

This request has been approved and completed.

Request ID: 0000000036
 Request Date: 2011-11-21
 Type: Segment 225599
 Fund Group: 16030 - Academic Affairs
 Action: Add

You can navigate directly to the request entry page by clicking the link below.

https://fo91qa.acs.ncsu.edu/psp/FO91QA/EMPLOYEE/PFO9100A/c/NC_REQUEST_NC_REQUEST.GBL?Page=NC_CF_HEADER&Action=U&BUSINESS_UNIT=NCSU1&NC_CF_ID=0000000036&NC_CF_DT=2011-11-21