

Program Chartfield Request Form



Request ID NEXT
 Request Status Newly Created
 Field Action Add

SetID STATE
 Field Name PROGRAM_CODE
 Field Value 8999A

Telephone

Email ID

Core Information

Budgetary Only

2 *Effective Date 07/14/2015

3 *Status Active

4 *Description

5 *Short Description

6 Long Description

Business Justification

Program A or B

8 *Agency:

9 Attachments (0)

Request Comments

Trees

17	*Tree Name	18	*Effective Date	Tree Description	19	*Insert Value Under Node	20	*Node/Leaf	21	Auto Update	Update Status
1	OH_PROGRAM_RPT		07/01/2014	Program Reporting Tree	A			Leaf		<input checked="" type="checkbox"/>	None

Requester
 Entered By
 Updated By

Entered Date/Time
 Updated Date/Time

Department Chartfield Request Form



Request ID NEXT
 Request Status Newly Created
 Field Action Add

SetID STATE
 Field Name DEPTID
 Field Value JEO101000

Telephone

Email ID

Core Information

Budgetary Only

*Effective Date

*Status

*Description

*Short Description

[Long Description](#)

Business Justification

Funding Only

Funding/Position

Not Applicable

13 *1- Existing HCM Parent Node

14 *2- New HCM Parent Node

15 *3- HCM Location Code

16 *4- Default Code1/Default Code2

[Attachments \(0\)](#)

Request Comments

Trees Personalize | Find | First 1 of 1 Last

*Tree Name	*Effective Date	Tree Description	Insert Value Under Node	*Node/Leaf	Auto Update	Update Status
1 OH_DEPT_RPT	07/01/2014	Translate to Agency	A	Leaf	<input checked="" type="checkbox"/>	None

Requester

Core Information:

1. **Budgetary Only:** Select this box if the Chartfield value should be set up for budgeting purposes only (will not be used for transacting).
2. **Effective Date*:** For brand new values, the EFFDT should be 01/01/1901. For inactivation or reactivation requests, the EFFDT should be the date that you want the change to take effect.
3. **Status*:** Active or Inactive. Please review the Chartfield inactivation checklist at the end of this document before choosing to inactive a Chartfield value.
4. **Description*:** 30 character description
5. **Short Description*:** 10 character description
6. **Long Description:** Extended description (optional)

Business Justification (Program):

7. **Program A or B:** Select this box if the Program Chartfield value contains an 'A', 'A#', 'B' or 'B#'. Those values represent Program Series or Programs in the Governor's Bluebook and require the approval of an OBM Analyst.
8. **Agency*:** Enter the 3 digit agency code that the program Chartfield value is assigned to.
9. **Attachments:** Used for sharing optional documentation

Business Justification (Department):

10-12. Funding Only (F), Funding/Positions (P), Not Applicable:

If a Department ID is being inactivated, please put N/A

If a Department ID will be used for funding only, please check Funding Only. Note: If you are checking this, the Existing or New HCM Parent Node Department ID should be PAY.

If a Department ID will be used for Positions, please check Funding/Position. Note: If you are checking this, the Existing or New HCM Parent Node Department ID should not be blank.

13. **ExistingHCMParentNode:** If you are unsure what the existing HCM ParentNode currently is, or have any other HCM Department ID related questions, please contact Rodney.Clifton@das.ohio.gov, or Edward.Martin@das.ohio.gov.

If this Department ID currently does not exist within HCM, please put N/A in this field.

If this Department ID does exist within HCM, put PAY if it's currently a funding only Department ID. If this Department ID is currently used for Positions in HCM, please put its current Parent Node in this field.

14. **NewHCMParentNode:** If this Department ID currently does not exist within HCM, and you want to use it for funding only, please put PAY in this field.

If this Department ID currently does not exist within HCM, and you want to use it for Positions, please put the Parent Node Department ID that this will go under.

If you are inactivating this Department ID, please put PAY.

If this Department ID is changing HCM Parent Nodes, or is moving from PAY to HCM Security, put the New HCM Parent Node.

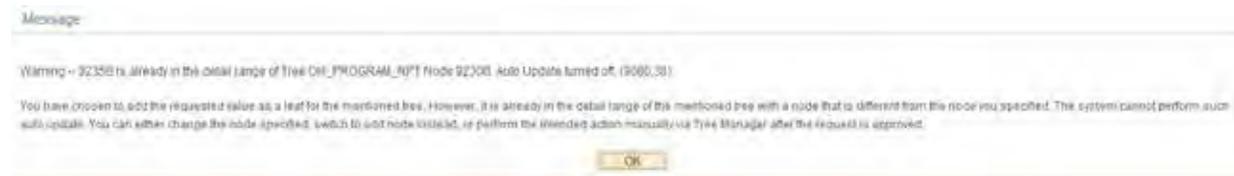
If there is no change from the Existing Parent Node to the New Parent node, put N/A.

15. **HCMLocationCode**: Put the current, or desired existing HCM Location Code in this field. If this is a funding only Department ID, or you are inactivating the Department ID you may put N/A.
16. **Default Code 1/Default Code 2**: Please give the default combo codes used for this Department ID when a Position is missing a position level budget table. If this will be a funding only Department ID, or you are inactivating the Department ID please put N/A.

Trees (Program):

17. **Tree Name***: The OH_PROGRAM_RPT reporting tree will default in this field. If your agency is using a FIN Agency Track or FIN Agency Control budget that uses a program translate tree (CC_PROG_TRACK or CC_PROG_CONTROL) then add a new row to include the tree changes for the translate tree in addition to the OH_PROGRAM_RPT tree.
18. **Effective Date***: This EFFDT will default in for the OH_PROGRAM_RPT tree. If you added an additional row for a translate tree, please enter the EFFDT as the 1st day of the current fiscal year (ie 7-1-16).
19. **Insert Value Under Node***: Make sure to select 'Node' or 'Leaf' under 'Node/Leaf' (#20) before completing this field. What program value in the tree should the new program value that is requested roll up to? Or if requesting an inactivation, what value in the tree does the requested program value to inactive roll up to?
 - A. You can select the tree icon to the left of this field to look up the tree and find the current setup to help you identify the value that belongs in this field.

If this Chartfield request will be for a change to the current setup of the tree, you may get this message. This means that the tree changes cannot be automatically saved when OBM processes the form and will require manual intervention to change the tree.



- 20. **Node/Leaf***: Is this value a 'Node' in the tree (with other values being 'detail' values that roll up to it) or is the value a 'Detail' value (lowest level of value in the tree that has no other values rolling up to it?)
- 21. **Auto Update**: If this is selected, the tree changes requested will automatically be populated in the trees when OBM approves the request.

Trees (Department):

- 22. **Tree Name***: The OH_DEPT_RPT reporting tree will default in this field. If your agency is using a FIN Agency Track or FIN Agency Control budget that uses a department translate tree (CC_DEPT_TRACK or CC_DEPT_CONTROL) then add a new row to include the tree changes for the translate tree in addition to the OH_DEPT_RPT tree.
- 23. **Effective Date***: This EFFDT will default in for the OH_DEPT_RPT tree. If you added an additional row for a translate tree, please enter the EFFDT as the 1st day of the current fiscal year (ie 7-1-16).
- 24. **Insert Value Under Node***: Make sure to select 'Node' or 'Leaf' under 'Node/Leaf' (#20) before completing this field. What deptid value in the tree should the new deptid value that is requested roll up to? Or if requesting an inactivation, what value in the tree does the requested deptid value to inactive roll up to?

You can select the tree icon to the left of this field to look up the tree and find the current setup to help you identify the value that belongs in this field.

If this Chartfield request will be for a change to the current setup of the tree, you may get this message. This means that the tree changes cannot be automatically saved when OBM processes the form and will require manual intervention to change the tree.



- 25. **Node/Leaf***: Is this value a 'Node' in the tree (with other values being 'detail' values that roll up to it) or is the value a 'Detail' value (lowest level of value in the tree that has no other values rolling up to it?)

26. **Auto Update:** If this is selected, the tree changes requested will automatically be populated in the trees when OBM approves the request.

Tips for Chartfield Inactivations:

Before your agency makes a request to deactivate a chartfield value, there are a number of OAKS processes that could be impacted by the chartfield inactivation. It is up to your agency to consider the following when requesting a chartfield inactivation. Carefully consider the date that you want the inactivation to take effect. Once the value is inactive, it will no longer be available for any transactions.

HCM

- Make sure to deactivate HCM Combo Codes that are using the Chartfield and ensure no positions are coded to the Combo Code.
- Are any positions coded to the Chartfield in the current pay period? If so, make sure the inactivation effective date is after the payroll processing for current pay period is complete.
- If this is the last pay period a Chartfield is going to be used, it should not be deactivated until after the payroll has processed.
- Also, if there is a termination, where there is another check coming after the final pay, the Chartfield should not be deactivated until that pay is processed.
- Finally are there any Travel & Expense reimbursements for an employee that are in progress? The Chartfield should not be deactivated until complete.

Asset Management: PROGRAM Inactivation

- Do you have any Assets that are assigned to the Program value that will be deactivated? Run this query in OAKS FIN (FIN>REPORTING TOOLS>QUERY>QUERY VIEWER) to determine: OH_AM_RECORDS_WITH_DEPT_ID
- If the query returns any assets for the Program value you wish to deactivate, you must go into OAKS AM and transfer the assets to a valid, active program value. If the query returns a large amount of assets for the Program value, contact Asset Management Services for assistance with the mass transfer.

Asset Management: DEPTID Inactivation

- Do you have any Assets that are assigned to the DeptID value that will be deactivated? Run this query to determine: OH_AM_RECORDS_WITH_DEPT_ID
- If the query returns any assets for the DeptID value you wish to deactivate, you must go into OAKS AM and transfer the assets to a valid, active DeptID value. If the query returns a large amount of assets for the DeptID value you wish to deactivate, contact Asset Management Services for assistance with mass transfers.

Purchasing

- Do you have any existing Purchase Orders that reference these ChartFields? Pay special attention to open encumbrances from previous fiscal years!
- Do you have any pending Requisitions that reference these ChartFields?

- Do you have any templates that reference these ChartFields? These templates will need to be recreated.
- If you use your requisition default settings, and it references one of these ChartFields, it will need to be updated.

Revenue/Receivables/AP

- Do you have any open Items in AR with the Chartfield?
- Do you have SpeedCharts or Item Entry Reason Codes with the Chartfield that have to be updated?