| **Step** | **Action** |
| --- | --- |
|  | Click on **Main Menu** |
|  | Scroll down and click the **Set Up Financials/Supply Chain** menu. |
|  | Click the **Common Definitions** menu. |
|  | Click the **Design ChartFields** menu. |
|  | Click the **Define Values** menu. |
|  | Click the **ChartField Request** menu. |
|  | Click on the **Add a New Value tab**, enter your agency SETID into the **SetID** field. Enter "**17300**". |
|  | Click the magnifying glass next to the Field Name to display the Look Up and click on the **BUDGET\_REF** link. |
|  | Click the drop down arrow next to the **Field Action** to display the options and choose Update to inactivate or change the Budget Unit. |
|  | Enter the Budget Unit value into the **Field Value** field. Enter **"9310"**. |
|  | Click the **Add** button. |
|  | On the ChartField Request page, enter the Requestor's phone number into the **Telephone** field. Enter "**785-296-0000**".  Click the object. |
|  | Enter the Requestor's email address into the **Email ID** field. Enter "**john.doe@da.ks.gov**". |
|  | Enter the effective date (current or future date) into the **Effective Date** field. |
|  | Click on the **Status** look-up and choose an option.  For this example, choose **Inactive.** |
|  | Review/enter the Budget Unit long descriptionand short description into the **Description** and **Short Description** fields.  For updates, the Description and Short description should be populated with the existing information. |
|  | Enter the request's effective date into the **Budget Unit Effective Date** field. This should be the same value as the **Effective Date** field. |
|  | Enter the due date of this request into the **Requested Due Date** field. |
|  | Click on the drop down arrow to display **Agency Number**. Click your agency number.  In this example, click the **17300** list item. |
|  | Enter the Agency contact name into the **Agency Contact Information** field. If different than the requester, enter name, email, and phone number.  Enter "**John Doe**". |
|  | Enter a reason for the change or inactivation. Enter the desired information into the **Authorization** field. Enter "**Funding no longer available**". |
|  | Enter your agency's Division of Budget analyst name, email and phone number into the **DoB Approver Information** field. Enter "**Jack Black, jack.black@budget.ks.gov, 785-296-9999**". |
|  | Enter the **Fund Number** associated to this Budget Unit. |
|  | The next Section contains **Questions** that must be answered prior to saving this request. |
|  | Review and enter answer.  For updates enter N/A (not applicable). |
|  | Confirm the **Requester's** contact information is completed. |
|  | Only after all the questions are answered, the request can be saved. Click the **Save** button. |
|  | The Request is ready to be submitted into **Workflow**.  Click the dropdown arrow and choose the **Submit for Approval** item.  Click the **Go** button.  This will submit the Request into Approval workflow. |
|  | Click the **View Approval Flow** link to see the workflow. |
|  | Approval Flow is displayed.  The Request will need to be approved by the **Agency Chartfield Approver** and the **Central Chartfield Approver.** After approval, the ChartField will be available in SMART.  See the **Approving ChartField Requests** UPKs to learn more about the Approval process. |
|  | **End of Procedure.** |