| **Step** | **Action** |
| --- | --- |
| 1.
 | Click on **Main Menu** |
| 1.
 | Scroll down and click the **Set Up Financials/Supply Chain** menu. |
| 1.
 | Click the **Common Definitions** menu. |
| 1.
 | Click the **Design ChartFields** menu. |
| 1.
 | Click the **Define Values** menu. |
| 1.
 | Click the **ChartField Request** menu. |
| 1.
 | Enter your agency SETID into the **SetID** field. Enter "**17300**". |
| 1.
 | Click the magnifying glass next to the Field Name to display the Look Up  and click on the **BUDGET\_REF** link. |
| 1.
 | Click the drop down arrow next to the **Field Action** to display options and choose **Add** to add a new **Budget Unit.** |
| 1.
 | Enter the Budget Unit value supplied by the Central Responsibilities Team into the **Field Value** field. Enter "**9990**". |
| 1.
 | Click the Add button. |
| 1.
 | On the ChartField Request page, enter the Agency Contact phone number into the **Telephone** field. Enter "**785-296-0000**". |
| 1.
 | Enter the Requester's email into the **Email ID** field. Enter "**john.doe@da.ks.gov**". |
| 1.
 | Enter the anchor effective date of "01/01/1901" into the **Effective Date** field |
| 1.
 | Enter in capital letters the Budget Unit long description, supplied by the Central Responsiblities Team, into the **Description** field. Enter "**TEST BUDGET UNIT**". |
| 1.
 | Enter the Budget Unit short description into the **Short Description** field. Enter "**TEST BU**". |
| 1.
 | Enter today's date into the **Budget Unit Effective Date** field. Enter "**09/11/2015**". |
| 1.
 | Enter the due date of this request into the **Requested Due Date** field. Enter "**09/30/2015**". |
| 1.
 | Click on the drop down arrow to display **Agency Number**. Click your agency number.  In this example, click the **17300** list item. |
| 1.
 | 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**". |
| 1.
 | Enter the Legal Authority for the Budget Unit.  Enter the Legislative Session, Appropriation Bill number, section and paragraph into the **Authorization** field. Enter "**Session 2015**, **SB100, Sec 5f**". |
| 1.
 | 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**". |
| 1.
 | Enter the **Fund Number** associated to this Budget Unit. |
| 1.
 | The next Section contains **Questions** that must be answered prior to saving this request. |
| 1.
 | The Effective Date for a new Budget Unit will always be '01/01/1901'.  Enter "**Y**". |
| 1.
 | Confirm the requested information is completed.  |
| 1.
 | Only after all the questions are answered, the request can be saved. Click the **Save** button. |
| 1.
 | Click the dropdown arrow and choose the **Submit for Approval** item.  Click the **Go** button.  This will submit the Request into Approval workflow. |
| 1.
 | Click the **View Approval Flow** link to see the workflow. |
| 1.
 | 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. |
| 1.
 | You have completed **Adding a Budget Unit** and submitting for approvals.**End of Procedure.** |