| **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 **Find an Existing Value** tab. |
|  | Enter your agency's 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. |
|  | Enter the Budget Unit value that needs inactivated or updated into the **Field Value** field. |
|  | Clear the **Request Status** value. |
|  | Click the **Search** button. |
|  | Click the **Copy** button at the top of the screen |
|  | On the **Request Copy** popup, click the dropdown next to the Field Action and choose **Update.** |
|  | Click on the **Field Value** field and enter the Budget Unit being updated. |
|  | Click the **OK** button. |
|  | Click the **Effective Date** link and change to the effective date of the Update -- Today's date or a date in the future. |
|  | To request the Fund Code be inactivated, click the dropdown and choose the **Inactive** list item. To make a change, leave Status as **Active**. |
|  | For updates only, click in the **Description** field and change the description. |
|  | For updates only, click in the **Short Description** field and change the short description. |
|  | Click in the Budget Unit **Effective Date** field and update with the same value as the **Effective Date.** |
|  | Click in the **Requested Due Date** field and enter the request due date. |
|  | For additional information, see the **Add a Budget Unit** UPK.  **Review the Questions** and update information and answers as needed.  In this example the Telephone and Email ID still need input. |
|  | Scroll down to the Request Action field.  Click the  dropdown and choose the **Submit for Approval** list item. |
|  | Click the **Go** button to Submit the Request into 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. |
|  | **End of Procedure.** |