

Request: How to add Corporation/Sponsored Program chartfield string to a Request



CAL POLY

Strategic Business Services

ADMINISTRATION & FINANCE

Adding a Chartfield String

- Concur automatically adds the travelers default chartfield string (CFS) to their Concur Request Header.
- If you will be traveling on corporation funds, a CFS should be added so that the Fund approvers for that CFS can review and approve prior to travel

To add Chartfield String

REQUEST | CORPORATION/GRAUNT TRAVEL CHARTFIELD STRING

The diagram illustrates the components of a Chartfield String. Callouts point to specific fields in a form:

- Business Unit:** SLCMP = CAL POLY
- FUND:** Select SL002 for corporation
- Department:** Select your Department ID
- Program:** Type in R1000
- Project:** Type in "Z" and 5 digit Fund EX: Z35063

The form fields shown are:

Business Unit	Fund	Department	Program	Class	Project
(SLCMP) SLCMP - Cal Poly San Luis Ob	(SL002) SL002 - 948-485 Reimbursed Ac	(126500) 126500 - SBS-Procurement Se	(R1000) R1000 - Cal PolyCorporation		(Z35063) Z35063 - CPC-Prof Dev - Math

1. You must completely clear each line that you want to update.
2. **TYPE IN** each line. DO NOT scroll to find the Fund, Department, Program or Project. There are chartfield strings for multiple CSU campuses available.
3. Select from the Drop Down

The screenshot shows the Concur interface with the following fields and actions:

- Fund *:** (SL002) SL002 - 948-485 Reimbursed Activity
- Class:** Search by Text
- Department *:** 126500 (Selected)
- Project:** Search by Text
- Comments To/From Approvers/Processors:** (Empty)

The Department dropdown menu is open, showing a list of options. The selected option is highlighted in yellow:

- (SL-SLCMP-SL001-100300) 100300 - OCUB-Industrial Tech&Packaging
- (SL-SLCMP-SL001-100300) 100300 - CAFES-Agribusiness
- (SL-SLCMP-SL001-126500) 126500 - SBS-Procurement Services
- (SL-SLCMP-SL001-120500) 120500 - Academic Programs & Planning
- (126500) 126500 - SBS-Procurement Services** (Selected)

5. Concur will remember chart fields that you have used before. If the one you need is listed, you can select one of those and it will auto fill the Dept ID, Program and Project Codes for you

(SL-SLCMP-SL001-115400) San Luis Obispo SLCMP - Cal Poly San Luis Obispo SL001 - 948-485 CSU Operating Fund 115400 - CSM-Mathematics
 (SL-SLCMP-70000-102500) San Luis Obispo SLCMP - Cal Poly San Luis Obispo 70000 - Dean's Power of Doing Fund 102500 - CAFES-Coll Ag Food& Env Sci
 (SL-SLCMP-SL002-100200) San Luis Obispo SLCMP - Cal Poly San Luis Obispo SL002 - 948-485 Reimbursed Activity 100200 - CAFES-BioResource & AgEngr

No

(SL-SLCMP-70000-102500) San Luis Obispo SLCMP - Cal Poly San Luis Obispo 70000 - Dean's Power of Doing Fund 102500 - CAFES-Coll Ag Food& Env Sci
 (SL-SLCMP-SL002-100200) San Luis Obispo SLCMP - Cal Poly San Luis Obispo SL002 - 948-485 Reimbursed Activity 100200 - CAFES-BioResource & AgEngr

Business Unit 2 (SLCMP) SLCMP - Cal Poly San Luis Fund 3 (SL002) SL002 - 948-485 Reimbursed Activity

3 SL002 4

6. OR if it is a new chartfield string, you will type in each line AND select from the dropdown (will be at the bottom of the list)

Fund (SL002) SL002 - 948-485 Reimbursed Activity

3 SL002 4

7. Once all fields are entered, hit **CREATE** to start adding expenses to your Request
8. If the Project Number does not populate, it has not yet been added to Peoplesoft or Concur.
 - a. Complete the Budget Amendment Request form to request a new project number located here:
<https://afd.calpoly.edu/budget/docs/adding-org-key.pdf>
 - b. More information on budget amendment and adding project codes and org keys
<https://afd.calpoly.edu/budget/forms-links>

