Ohio Buys

How to Enter Chartfield Information

Step-by-Step Instructions for Entering Chartfield Information

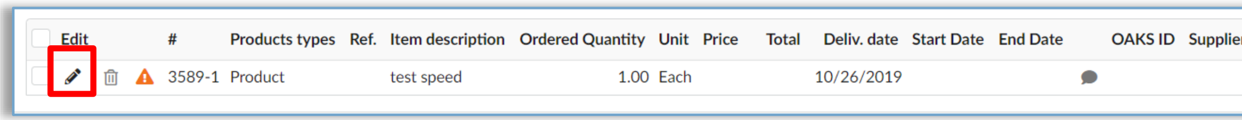
1

During the checkout process, Requesters, Requisitioners, and Agency Procurement Approvers, and Agency Fiscal Apprvers can enter chartfield information for each line item. Requesters, Requisitioners, and Agency Procurement Approvers are not required to enter chartfield information; however, this information becomes mandatory at the Fiscal Agency Approver step of the Purchase Requisition approval workflow.

⚠ Log in to Ohio Buys. Open the purchase requisition to which you would like to add chartfield information.

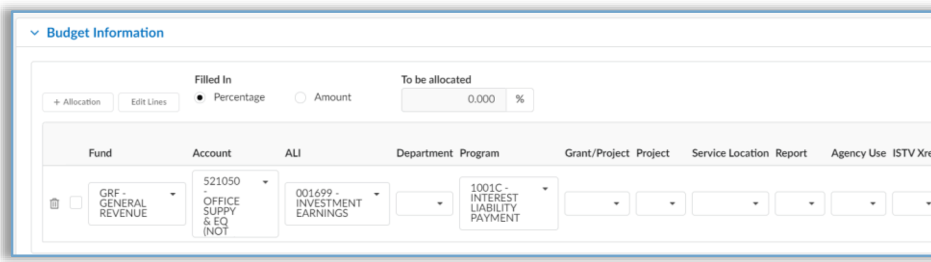
2

To enter chartfield information, navigate to the line item you want to add the chartfield information to and click the **Pencil** (✎) icon.



3

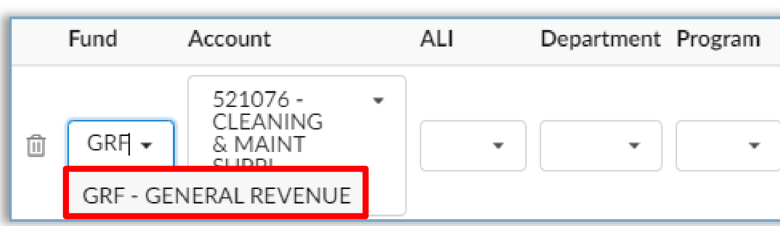
Navigate to and open the **Budget information** pane.

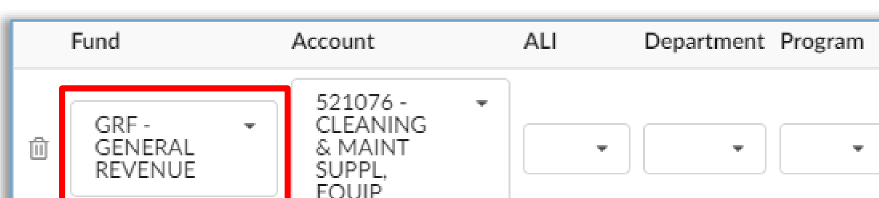


4

To add chartfield information, you must click in the desired field and then enter and select a value from the displayed drop-down menu (e.g., if you just type GRF in the Fund field and then tab over to the next field, the value will not be populated in the field).

⚠ The information entered in this section is the same information you previously would have provided in OAKS.





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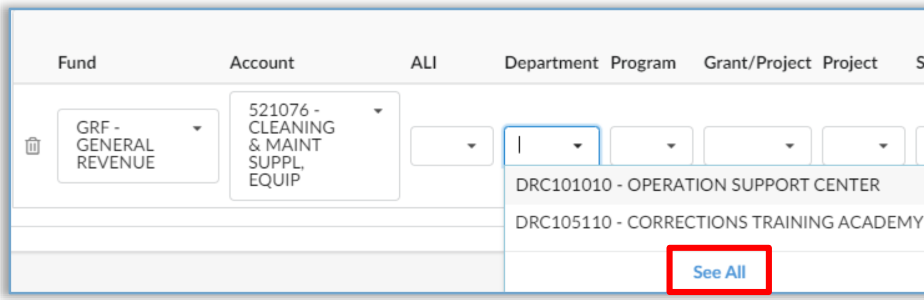
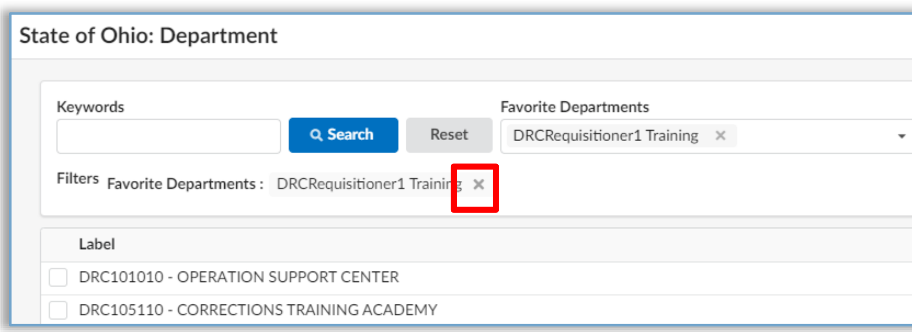
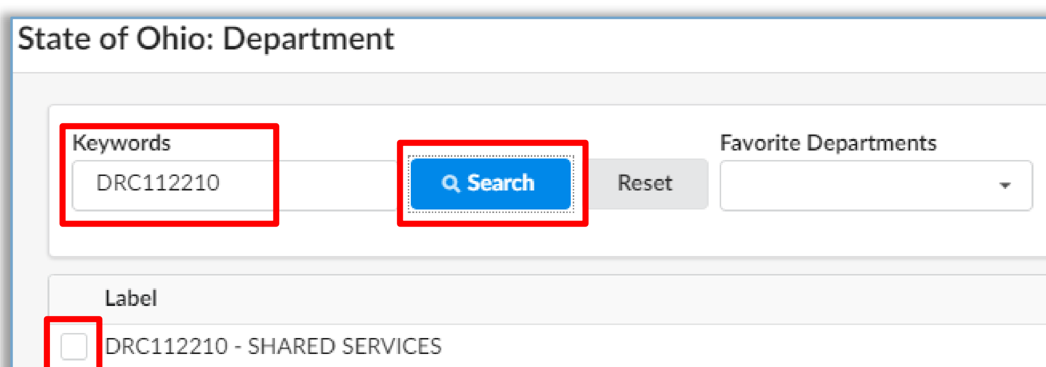
- Whenever you are purchasing from an ISTV account, you need to select the correct account code in the **Account field** instead of the default code that is populated in the chartfield information
- When populating the **Department** field, first click in the field. If you have added favorite departments to the Default Settings in your profile, those departments will be displayed and you are able to select a Department from the displayed drop-down menu.
- If you have not added any favorite departments, or need to find a value that you have not set as a favorite, click **See All** and clear the filter on Favorite Departments by clicking the **X**.





Use the **Keywords** field and search for the desired department, then select it using the checkbox ( ) to the right.



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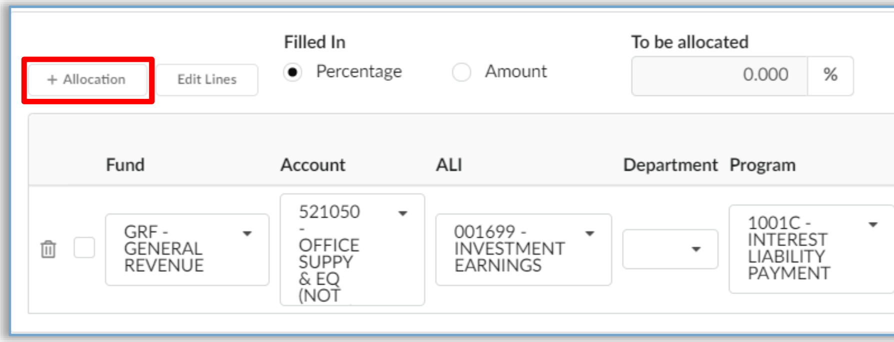
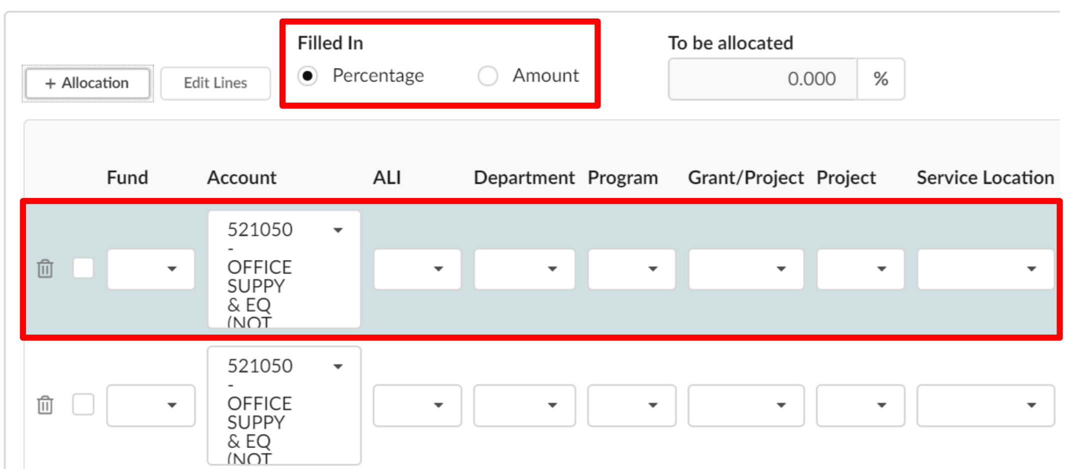
⚠ To allocate a single line item across multiple chartfield items click the **+ Allocation** icon.



Indicate whether you will be allocating by Percentage or Amount by clicking the respective radio button. Complete the chartfield information for the new allocation line.

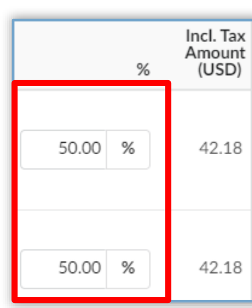


The columns for indicating allocation Percentage or Amount are initially located to the far right of the chartfield grid.

⚠ You can right-click on any of the column headers to customize which columns are displayed (toggle the radio button off to hide, on to display) and in which order (drag and drop the column within the list display).

Enter the allocation (Percentage in this example) for each allocation line.

When you have finished adding allocation lines and entering the allocation for each line, click **Save**.



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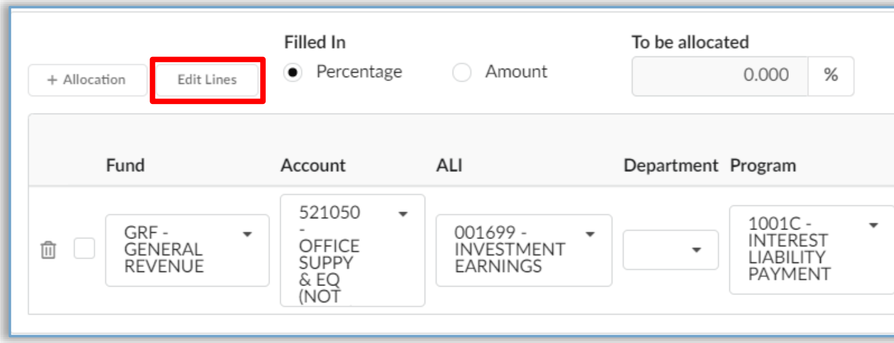
To mass update fields across multiple chartfield lines, click the **Checkbox** ( ) icon to the left of the lines you wish to update and click **Edit Lines**.



You will be brought to the Allocation Line Mass Update page. From there, the process for selecting chartfield information is the same. When you save, the information will be applied to all of your selected chartfields.