Introduction:

The processes to create, modify, or inactivate a Project involves other University offices; Phase requests are completed by Humanities and Social Sciences Financial Services. Before any requests are submitted, do a Chartfield Inquiry for existing Projects/Phases to insure that a similar Project/Phase has not already been created. This document has two sections: Searching for Existing Projects/Phases, and Submitting a Request for Project/Phase Changes.

Searching for Existing Projects/Phases

A listing of Projects and Phases is available using the Chartfield Inquiry, with multiple ways to search for the information you need.

Go to the Chartfield Inquiry screen, selecting it from the WolfPack Reporting System (WRS) Other Reporting Links on the WRS Main Menu, or from MyPack Portal > Financial Systems > Monitoring Tools & Reports > Chartfield Inquiry.

1. It is only necessary to enter information in one of the search fields, but you may need to use some of the other search fields to narrow the request, usually by OUC (Department).
   a. Search by OUC: entering an OUC will list all of the projects in the OUC. If the Department/Program has more than one OUC, you may be able to list all projects by searching with the first four digits of the OUC.
   b. Search by Project: enter your search term in the Project ID field; this also provides a listing of the phases for a project. You can enter partial search terms; for example, if you want a list of all of your 2-ledger projects and phases, you can enter 2 in the Project ID field and the significant digits of your OUC in the Department field. The wild card (%) is also available, and an underscore (_) can be used in a pattern to exactly match one character. Click on Help on the Chartfield Inquiry page or use the Chartfield Inquiry Help link for additional search options and additional information.

2. The choices in the Status drop-down box limit the projects from the default value (lists all projects) to only active, or inactive projects. If you are requesting a new phase or project, make sure you are seeing all projects – inactive projects and phases should not be re-used.

3. The listing of projects can be downloaded into a spreadsheet (click small grid icon just above the Auxiliary Code Description column).
4. Clicking on a Project ID in the search results will transfer to the Project Maintenance and Inquiry page for additional information on the Project.

**Submitting a Request for Project/Phase Changes**

**Submitting a Request for a Project - Establish or Inactivate:**
Project requests or modifications: Project requests originate with the College, but must receive University approvals, based on the source of the project funding. Please contact the Humanities and Social Sciences Business Officer for assistance if you determine that a new project is needed.

**Submitting a Request for a Phase - Establish or Inactivate:** A phase request is an internal request, processed by Financial Services. Please provide the following information in an e-mail to your Financial Services representative - multiple Phases should be submitted in spreadsheet format:
1. Project number for the Phase
2. Any preference you have for numbering the five-digit phase(s)
3. A description of what the phase will be used for; enough information so that both a Short Description and a Long Description can be entered.
4. A Phase end date, if you know that the phase will be used for a limited time.

**Submitting a Request to change project exemption(s) for food or alcohol purchases:**
*Note:* This does not apply to State funding sources.
Each project has a code which determines whether the project can be used for food and alcohol purchases or reimbursements. To check the code, follow the path Financial Systems > Journals & Chartfield Maint > Project Maint & Inquiry, and enter the Project ID. The value under the heading Food & Entertainment for Food is 2; for Food and alcohol, 5. Requests for changes to that code are sent in the form of an e-mail to Foundations Accounting & Investments (please check with FAI for the name of the person to address), and should include a statement relating the purpose of the project to the specific need for the change.

**Additional References:**


Chartfield Inquiry Help: [https://budget.ncsu.edu/nc_cf_inquiry_help.htm](https://budget.ncsu.edu/nc_cf_inquiry_help.htm)

Additional information about using the WolfPack Reporting System, Chartfield Inquiry, and other Queries: see document “Queries and WRS Use”