Connect CAROLINA

Using the Chartfield Checker Tool

Overview

The Chartfield Checker is a tool that lets you verify that your chartfield string is valid and has budget before you enter a transaction in ConnectCarolina.

You can use the Chartfield Checker prior to entering a transaction in ConnectCarolina when the transaction needs to be processed quickly and cannot be delayed by potential errors. Or, if your department imports journals into ConnectCarolina from a flat file, you can use the Chartfield Checker to validate the transactions before they are uploaded into the system.

Navigation: Point your browser to **https://ccinfo.unc.edu/tools/chartfield-checker**

Using the Chartfield Checker

In this field:	Do the following:
Trans. Type	Choose the type of transaction you need to enter.
Business Unit	Enter **uncch** for the University, **uncga** for General Administration, or a foundation business unit.
Fund Code	Enter the fund used on the transaction.
Source	Enter the source used on the transaction.
Account	Enter the account used on the transaction.
Department	Enter the department used on the transaction.
PC Bus. Unit	If the transaction is for a contract or grant, choose one of the following: • Enter **chosr** for the University or a foundation • Enter **gaosr** for General Administration • Otherwise, leave this field blank
Project	If the transaction is for a contract or grant, enter the project ID. Otherwise, leave this field blank.
Activity	If the transaction is for a contract or grant, enter 1. Otherwise, leave this field blank.
Program	If the transaction uses it, enter the program code, which accommodates your department or school's reporting needs.
Cost Code 1	If the transaction uses it, enter cost code 1, which accommodates your department or school's reporting needs.
Cost Code 2	If the transaction uses it, enter cost code 2, which accommodates your department or school's reporting needs.
Cost Code 3	If the transaction uses it, enter cost code 3, which accommodates your department or school's reporting needs.
Budget Date	If you want to see if there will be available budget on a future date, enter that date in the field. Otherwise, leave the field blank to use today's date. **Note:** A budget date is useful for grants when the transaction will be entered on a future date. The transaction will fail budget checking if the project end date occurs before the date entered in this field.
Amount	Enter the amount of the transaction. **Note:** The field is limited to 10 characters including commas and decimals. You are not required to enter commas and decimals.

Fill out all necessary fields, then click the **Submit** button.

Note: The tool takes from eight to 20 seconds to run. Depending on your browser, you may not see an hour glass or spinning icon; however, the browser tab displays the word "Connecting" when the tool is running.

To check another chartfield string, click the **Clear Form** button.

Enter the next set of chartfield values and the amount you want to validate.

Chartfield Checker Error Messages

If the chartfield string is invalid or does not have available budget, the tool displays an error message in red text at the top of the page. The table below lists some common error messages.

After resolving any errors, enter the correct values in the appropriate fields and click the **Submit** button to verify the chartfield string and amount are valid.

Error Type	Message	Possible reason for the error
Chartfield	Invalid combination.	Two or more chartfields do not work in combination with each other.
Chartfield	Invalid value in DEPTID: XXXXX.	The wrong business unit was entered.
Chartfield	A valid Chartfield String is required.	The business unit field is blank.
Chartfield	The status of "Ended" for project XXXXXXX prevents additional transactions.	The system prevents transactions for a project chartfield string with an "Ended" status.
Chartfield	The status of "Reporting" for project XXXXXXX prevents additional transactions.	The system prevents transactions for a project chartfield string with a "Reporting" status.
Budget	Budget date out of bounds.	The grant for this chartfield string has ended.
Budget	No budget exists.	A budget was never set up for this chartfield string.
Budget	Exceeds budget tolerance.	The amount entered is greater than the available budget.

Notes

- Using this tool is optional. The system will validate your chartfield strings and make sure there is adequate budget, no matter if you use the Chartfield Checker.

- The tool indicates whether a chartfield string currently has budget available. It does not encumber or reserve funds.

- The Chartfield Checker validates and budget checks one chartfield string at a time.

- If your department processes a high volume of transactions and needs to check many transactions, the Chartfield Checker may not be right for you. An automated alternative is available; have your IT person contact the Help Desk for details.

Enter a Chartfield String and Amount to check.
*Required Fields

Trans. Type*	Journal
Business Unit*	UNCCH
Fund Code*	21101
Source*	13001
Account*	558914
Department*	452400
PC Bus. Unit	
Project	
Activity	
Program	
Cost Code 1	
Cost Code 2	
Cost Code 3	
? Budget Date	
Amount*	1000

Submit   Clear Form