

THREE STEPS REQUIRED FOR ACCESS TO CHARTFIELD REQUESTS

Purpose

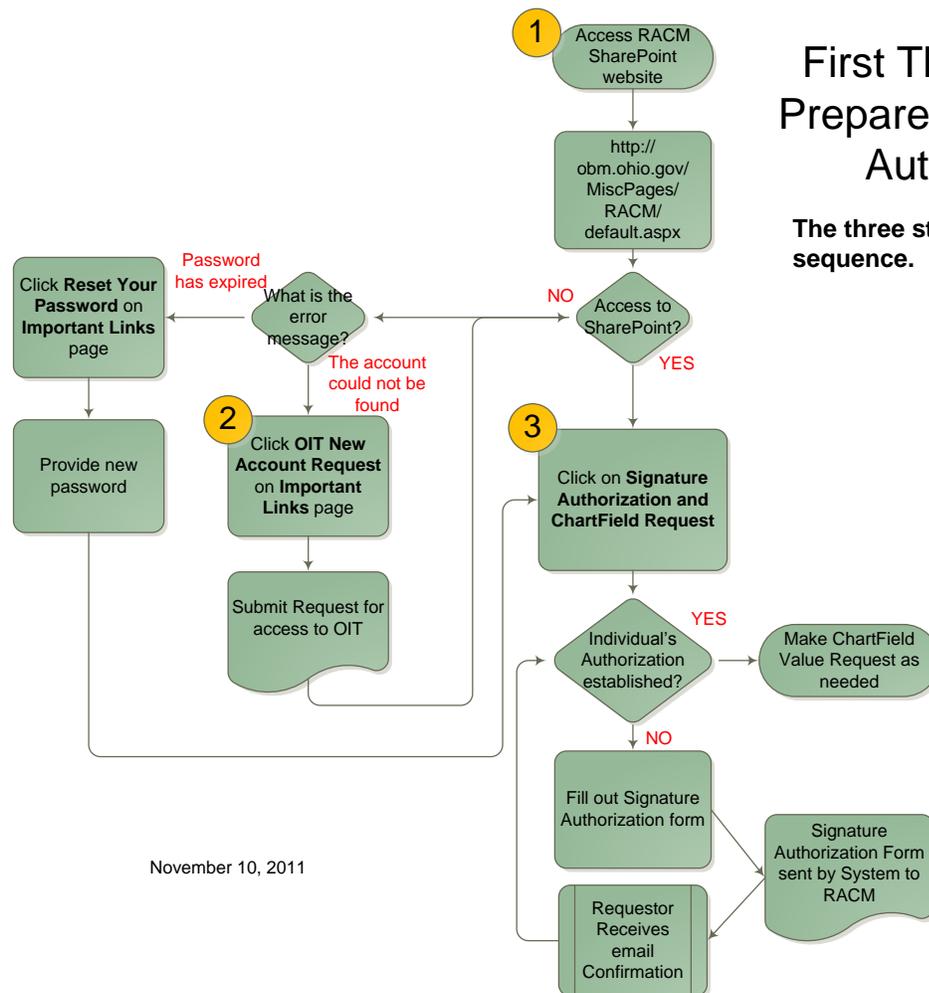
In addition to this job aid, please reference the job aids for the Signature Authorization Request and the ChartField Requests, found on the OBM website under ChartField Value Requests:

<http://obm.ohio.gov/MiscPages/Forms/default.aspx>.

Overall Process Procedure

Three steps are required for access to the ChartField Value Request website.

The Three Steps can be done at different times, but must be done in the order listed.



THREE STEPS REQUIRED FOR ACCESS TO CHARTFIELD REQUESTS

Step 1: Check for Access to RACM SharePoint



Navigation: <http://obm.ohio.gov/MiscPages/Forms/default.aspx>

1. Access the OBM Website at the navigation link, above.
2. Click the LINK for Signature Authorization and ChartField Value Request.



3. The **Important Links** page displays.

The Office of Budget and Management - RACM ChartFields

RACM ChartFields

Important Links

- [Signature Authorization and Chartfield Request](#)
 - The ChartFields site is part of the General Ledger Portal which has been established by the Office of Budget and Management (OBM) to streamline the OBM General Ledger processes.
- [OIT New Account Request](#)
 - Request a new State of Ohio SharePoint Services account
 - Follow the tips given on the page. For example, "Light red columns are required"
 - E-mail completed spreadsheet to obm.appSupport@obm.state.oh.us
 - Please note that new account requests may take up to two business days to process
- [Reset Your Password](#)
 - Manage the 90-day reset requirement for passwords.
 - Enter your e-mail address in the User ID field and click the Logon button. A link for resetting your password will then be sent to you via e-mail.

Contact Information – Business Processes

- obm.ChartField@obm.state.oh.us
 - Contact us if you have any questions on the above business processes

Contact Information – Technical

- obm.appSupport@obm.state.oh.us
 - Contact us if you have any technical questions

4. Click the **Reset Your Password** link. Continue to **Step 2: Obtain Access to RACM ChartField website.**

THREE STEPS REQUIRED FOR ACCESS TO CHARTFIELD REQUESTS

Step 2: Obtain Access to RACM ChartField website

1. When the **Reset Your Password** link is clicked, if you do not have access to the RACM SharePoint website, the following screen appears.



Self-Service Password Management

Enter your user name to reset your password

Logon Information

User Name:

Logon

The account could not be found.

Make sure your User name and domain are correct.

2. If you do not see this screen, you have access to the RACM ChartField website, but you will need to sign in. Go to **Step 3: Signature Authorization and ChartField Request**.
3. Otherwise, go back to the **Important Links** page and click on **OIT New Account Request**.

The Office of Budget and Management - RACM ChartFields

The screenshot shows the RACM ChartFields website. At the top, it says "RACM ChartFields". Below that is the "Important Links" section. The links listed are: "Signature Authorization and Chartfield Request", "OIT New Account Request" (highlighted with a red box), and "Reset Your Password". Under "Signature Authorization and Chartfield Request", there is a sub-link "The ChartFields site is part of the General Ledger Portal which has been established by the Office of Budget and Management (OBM) to streamline the OBM General Ledger processes." Under "OIT New Account Request", there are several bullet points: "Request a new State of Ohio SharePoint Services account", "Follow the tips given on the page. For example, 'Light red columns are required'", "E-mail completed spreadsheet to obm.appSupport@obm.state.oh.us", and "Please note that new account requests may take up to two business days to process". Under "Reset Your Password", there are two bullet points: "Manage the 90-day reset requirement for passwords." and "Enter your e-mail address in the User ID field and click the Logon button. A link for resetting your password will then be e-mailed to you."

4. Fill out the displayed Excel spreadsheet online and submit to the eMail address listed for OBM.appsupport. The new account may take up to 2 business days to process.

THREE STEPS REQUIRED FOR ACCESS TO CHARTFIELD REQUESTS



You can have multiple names on one form.

1	A	B	C	D	E	F	G	H	I	J	K	L	M
2	OIT New Account Request Form												
3	<i>All of the columns marked in light red are required fields.</i>												
4	<small>The Agency field can include: state agencies, universities, colleges, boards, commissions, or company names. All state employees have an OAKS ID and non-state employees may have had one assigned.</small>												
5	<u>Please return form to obm.appsupport@obm.state.oh.us for processing.</u> <small>Please note that new account requests may take up to 2 business days to process.</small>												
6	First Name	MI	Last Name	Email Address	Street Address	City	ZIP	Phone	Fax	Work Title	Division	Agency	OAKS ID if One is Assigned
7													
8													

5. You will be notified by eMail when your account is ready.
6. If you receive this screen, after clicking **Reset Your Password**, type in your eMail Address and password. You will need to supply a password once your access has been granted. **Reminder:** The passwords expire every 90 days.

Windows Security

Connecting to obm.sp.ohio.gov.

User name

Password

Domain: OBM

Remember my credentials

OK Cancel

Step 3: ChartField Signature Authorization and ChartField Value Request

1. On the Important Links page, click **ChartField Signature Authorization and ChartField Value Request**.

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The Office of Budget and Management - RACM ChartFields

RACM ChartFields

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- DIT New Account Request
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 - Please note that new account requests may take up to two business days to process
- Reset Your Password
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 - Enter your e-mail address in the User ID field and click the Logon button. A link for resetting your password will then be sent to your e-mail address.

2. The OBM ChartField page displays.

OBM ChartField

OBM External Portal > OBM ChartField

User View

- Chartfield Requests
 - AgencyUse
 - Budget Reference
 - Department
 - Grant
 - Program
 - Project Construction
 - Project Non-Construction
 - Reporting
 - Service Location

ChartField Value Requests

These are used to designate and authorize employees to sign for the Chief Fiscal Officer of your agency for the purposes of adding or modifying ChartField value requests for the following: Department, Program, Grant, Project, Service Location, Reporting, Agency Use and Budget Reference.

If you would like guidance, click here for the [Signature Authorization Request Form - Job Aid](#).

For guidance in using the ChartField Requests, click here for the [Chartfield Request Job Aid](#).

Signature Form

Edit ChartField Agency Business Unit CFO Authorized CFO Designee Remove Authorization Request Completed

ChartField Agency Code : OBM (1)

+ Add new item

3. When you find your name by clicking on the plus sign next to your agency, you are ready to begin submitting ChartField Value Requests. Follow the job aid located on the screen above to get guidance on submitting ChartField Value Requests.

Signature Form

Edit ChartField Agency Business Unit CFO Authorized CFO Designee

ChartField Agency Code : OBM (1)

+ Add new item