

Process:	Finding Department Project Numbers – Chartfield Inquiry		
Contact:	Humanities and Social Sciences Financial Services	Last Revision Date:	05/12/2025

Introduction:

Financial resources are assigned a project number, categorized by purpose, source, and financial reporting section. Various codes, referred to as chart fields, provide information regarding the activities reflected within a project number. Identifying the project numbers within a unit assists with learning the funds available within a unit and a “Chartfield inquiry” provides the means of identifying existing project numbers.

Project numbers may be a 6-digit main segment (201xxx) or an 11-digit phased-project (201xxx-xxxxx), created to categorize activities within a project. For example, project 201001 might represent state-funded instructional activities, with project 201001-00202 reflecting state-funded graduate assistant instructional activities.

Searching for Existing Projects/Phases

A listing of projects and phases is available using the Chartfield Inquiry, with multiple ways to search.

Access Chartfield Inquiry by selecting it from the WolfPack Reporting System (WRS) Other Reporting Links on the WRS Main Menu,



or from the Journals-IDTs-Chartfields tile,



or following the menu path from MyPack Portal > Financial Systems > Financials Quick Nav> Monitoring Tools & Reports > Chartfield Inquiry.

Chartfield Inquiry

Enter Search Criteria and select Search

Search Requests

Project ID: Department: Fund Code: Program: Class: Status: [Help](#)

Funding Group: Project Ref: Aux Code:

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 search, usually by OUC (Department).
 - a. Search by OUC: entering an OUC in the department field will generate a list of all the projects in the OUC. If the department or program has more than one OUC, you may be able to generate a list of all projects by entering only the first four digits of the OUC in the department field.
 - b. Search by Project: entering a project in the Project ID field generates a list of all the phases associated with a project. You can also 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 limits 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 as they may be reactivated as needed.
3. The generated list of projects can be downloaded into a spreadsheet (click the small grid icon just above the Auxiliary Code Description column).
4. Clicking on a Project ID in the search results will display 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:

Requests to establish, inactivate, or modify a project originate in the unit and route through the OFS before routing for University approval based on the source of the project funding. Please contact the OFS Accounting Manager for assistance.

Submitting a Request for a Phase:

Requests to establish, inactivate, or modify a phase will be processed within the OFS. Please provide the following information in an e-mail to your Financial Services Accountant, with multiple phase requests being submitted in spreadsheet format:

1. Project number for the Phase
2. Any numbering preference desired for the five-digit phase(s)
3. A description of what the phase will identify; please provide enough information, including details for acronyms, to provide both a Short Description and a Long Description in the financial system.

4. A phase end date, if you know 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 an exemption code that determines whether the project can be used for food and alcohol purchases or reimbursements.

To check the exemption code, generate a WRS P1 report for the project and review the Food & Entertainment designation.

Download to Excel	Show/Hide Balance Sheet	Show/Hide Accounts	Show/Hide FTE/Future	Add/Remove Personnel Encumbr
682432	Exact? <input type="checkbox"/>	As of today		Rerun
Description:				CHASS Excellence Fund
Short Description:				CHASS EXCELLENCE FUND
Program:				General Academic Support (152)
Food & Entertainment:				Food/Entertainment/Alcohol allowed. (5)
FAI Fund Type:				Restricted Fund (regular) (E0)

An exemption code of “2”, under the heading Food & Entertainment, reflects food expenses are allowable; a code of “5” indicates food and alcohol expenses are allowable.

To request changes to an exemption code, send an email to your OFS accountant. Your email should include a statement of how the change is associated with the purpose of the project and the specific need for the requested change. OFS will work with FAI to adjust the project; FAI makes the final approval decision.

Additional References:

Chartfield Inquiry Help: https://budget.ncsu.edu/nc_cf_inquiry_help.htm