

Adding a new Chartfield 1 (CF1) or Chartfield 2 (CF2) value in the BFS:

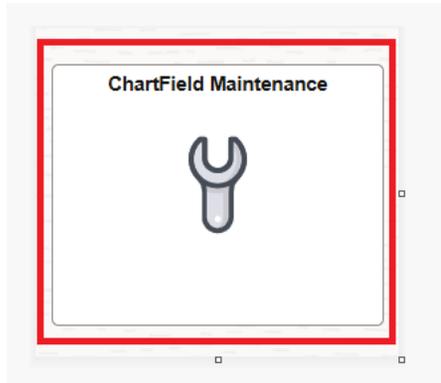
This document provides step-by-step instructions to create new CF1/CF2 values in the Berkeley Financial System (BFS). For detailed information on CF1/CF2 fields, attributes and codes that can be created by department users, refer to the guidelines defined in the Chart of Accounts page at the following link:

<https://controller.berkeley.edu/accounting-and-controls/financial-reporting/chart-accounts>

Adding a new CF1 value:

To begin, sign into the BFS system and the BFS Homepage:

1. Click on the “Chartfield Maintenance” tile and select “Chartfield 1” field.



2. Click on “Add A New Value” Button

Chartfield1

Find an Existing Value 2 + Add a New Value

Search Criteria
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

*SetID = 10000

ChartField 1 begins with

Description begins with

Show fewer options

Case Sensitive Include History Correct History

Search Clear

3. “ChartField 1”: Assign a CF1 value (maximum length is 6 characters). CF1 codes for a departmental value begins with the 2-character department prefix and can be alphanumeric.

See [link](#) for more details on CF1 values, and Departmental Codes, Campus Management Codes, Plant Project Codes, UC Systemwide Program codes.

Chartfield1



Add a New Value

Find an Existing Value

*SetID 10000

*ChartField 1 TSTCF1

3

Add

4

4. Click 'Add'.
5. Input the CF1 effective date .
6. Input the 'Description' (maximum 30 characters).
7. Input the 'Short Description' (maximum 10 characters).
8. Click on the 'Attributes' field.

ChartField1



Chartfield1

UC Chartfield 1 Properties

UC BearBuy Authorizers

SetID 10000

ChartField 1 TSTCF1

Effective Date

*Effective Date 5	*Status	*Description 6	*Short Description 7	Budgetary Only	Attributes 8	Long Description		
12/09/2024	Active	Test CF1	TSTCF1	<input type="checkbox"/>	Attributes	Long Description		

Save Notify

Add Update/Display Include History Correct History

Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers

9. Attribute: select an attribute from the list (see details listed below) and select OK. For questions & guidance related to C&G funds & related attributes, reach out to Contract & Grants Accounting at cgahelp@berkeley.edu.

ChartField1

UC Chartfield 1 Properties UC BearBuy Authorizers

SetID 10000 ChartField 1 TSTCF1

Effective Date

12/09/2024

ChartField Attributes

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value
10000	TSTCF1	12/09/2024	CHARTFIELD1		

Look Up ChartField Attribute

*SetID 10000
Field Name CHARTFIELD1
ChartField Attribute begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 | 1-10 of 10

- ChartField Attribute
- COST SHARE
- FABRICATION
- FUND YEAR
- NON C&G ATTRIBU
- NONE OF ABOVE
- PI/FACULTY
- PROGRAM INCOME
- RBRLWR
- SYSTEMWIDE PROG
- TASK/DELIVR/PHA

CF1 Attributes:

The following is a list of CF1 Attributes. If none of the available values are applicable, “NON-C&G ATTRIBUTE” should be selected.

- COST SHARE - used to describe cost share
- FABRICATION - used to describe fabrication
- FUND YEAR - used to describe funding period
 - When FUND YEAR is selected, an Attribute Value defining the year (year 1, year 2) must also be selected.

- NON-C&G ATTRIBU - used when CF1 is not used for C&G funds
- PI/FACULTY - used for PI/Faculty/Collaborator.
- PROGRAM INCOME - used to describe program income
- TASK/DELIVR/PHA - used to describe task/deliverable/phase
- NONE OF ABOVE - used for a C&G fund when none of the others apply
- SYSTEMWIDE PROG - used to track activity for UC systemwide programs. For instructions on assigning the systemwide attribute to CF1 values – see [CCOA Systemwide Program CF1 Attributes Job Aid](#)

10. 'Chartfield Attribute Value' is a required field if you choose Cost Share, Fund Year, PI/Faculty, Program Income, RBRLWR or Systemwide Program as the 'Attribute'. Make the appropriate selection based on the list of available values for this field.

ChartField1

UC Chartfield 1 Properties UC BearBuy Authorizers

SetID 10000 ChartField 1 TSTCF1

Effective Date

12/09/2024

Save Notify

Chartfield1 | UC Chartfie

ChartField Attributes

ChartField Attribute Values

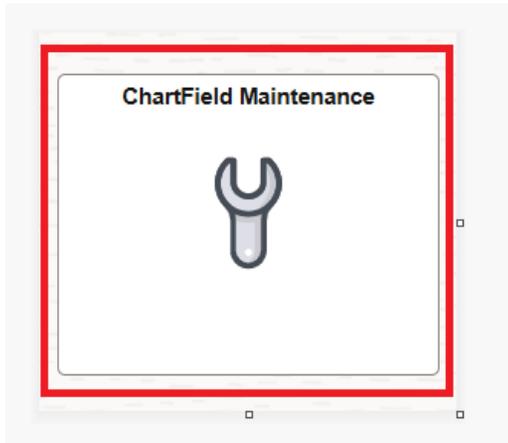
SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description		
10000	TSTCF1	12/09/2024	CHARTFIELD1	<input type="text"/>	<input type="text" value="10"/>		+	-

OK Cancel

11. Click 'Save' to add the CF1.

Adding a new CF2

1. Click on the “Chartfield Maintenance” tile and select “Chartfield 2” field.



2. Click on “Add A New Value” Button

← | 🕒 | ❤️

Chartfield2

🌐 | ⓘ | 🔄 | ⚙️ | 📄

Find an Existing Value 2 ⊕ Add a New Value

▼ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

🕒 Recent Searches Choose from recent searches ▼ 📌 Saved Searches Choose from saved searches ▼ ✎

*SetID = ▼ 10000 🔍

ChartField 2 begins with ▼ 🔍

Description begins with ▼

^ Show fewer options

Case Sensitive Include History Correct History

Search Clear

3. ChartField 2: Assign a CF2 value (maximum length is 5 characters). The field can be alphanumeric.
4. Click 'Add'.

Chartfield2



Add a New Value

Find an Existing Value

*SetID 10000

*ChartField 2 TSTC2

3

Add

4

5. Input the CF2 'Effective Date'.
6. Input the 'Description' (maximum 30 characters).
7. Input the 'Short Description' (maximum 10 characters).
8. Click on the 'Attributes' field.

ChartField2



Chartfield2

[UC ChartField 2 Properties](#)

[UC BearBuy Authorizers](#)

SetID 10000

ChartField 2 TSTC2

Effective Date



1-1 of 1 | View All

*Effective Date 5	*Status	*Description 6	*Short Description 7	Budgetary Only	Attributes 8	Long Description		
12/09/2024	Active <input type="checkbox"/>	Test CF2	TSTCF2	<input type="checkbox"/>	Attributes	Long Description	<input type="button" value="+"/>	<input type="button" value="-"/>

[Chartfield2](#) | [UC ChartField 2 Properties](#) | [UC BearBuy Authorizers](#)

9. Select the appropriate attribute from the list (see details below) and click 'OK'. For questions & guidance related to C&G funds & related attributes, reach out to Contract & Grants Accounting at cgahelp@berkeley.edu.

The screenshot displays the 'ChartField2' application interface. The main window shows 'SetID 10000' and 'ChartField 2 TSTC2'. A 'ChartField Attributes' dialog box is open, containing a table with the following data:

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute
10000	TSTC2	12/09/2024	CHARTFIELD2			

Below the table are buttons for 'OK', 'Cancel', and 'Refresh'. A 'Look Up ChartField Attribute' search window is also open, showing search criteria: 'SetID 10000', 'Field Name CHARTFIELD2', and 'ChartField Attribute begins with'. The search results list includes: 'COST SHARE', 'FABRICATION', 'FUND YEAR', 'NON C&G ATTRIBU', 'NONE OF ABOVE', 'PI/FACULTY', 'PROGRAM INCOME', and 'TASK/DELIVR/PHA'. A red arrow points from the search results to the 'ChartField Attribute' column in the dialog box table.

CF2 Attributes:

All CF2 values must have an Attribute. The following is a list of CF2 Attributes:

- COST SHARE - used to describe cost share
- FABRICATION - used to describe fabrication
- FUND YEAR - used to describe funding period
- NON- C&G ATTRIBU - used when CF2 is not used for C&G funds
- PI/FACULTY - used for PI/Faculty/Collaborator. When PI/FACULTY is selected an Attribute Value must also be selected – click the Lookup icon in the Attribute Value field and select the name/employee ID for the individual this CF2 value describes.
- PROGRAM INCOME - used to describe program income
- TASK/DELIVR/PHA - used to describe task/deliverable/phase
- NONE OF ABOVE - used for a C&G fund when none of the other attributes apply

10. 'Chartfield Attribute Value' is a required field if you choose Cost Share, Fund Year, PI/Faculty as the 'Attribute'.

11. Click 'Save' to add the CF2.

Inactivating a Chartfield 1 (CF1) value in the BFS:

These instructions can also be used to inactivate a CF2.

Run the COA Inactivation report and refer to the COA Inactivation guide to check for any open items before inactivating a CF1 or CF2 value. Open items must be cleared before the CF1/CF2 value can be inactivated, see the '[User Guide](#)' by navigating to the COA Inactivation Report in this [link](#).(link)

UCB Chartfield Maintenance

- Define ChartField Value
- Validate COA/Speedtype
- Mass Chartfield Inactivation
- COA Inactivation Report**
- Define Speed Type
- Project Chartfields CrossWalk
- Capital Asset Numbers (CAAN)

COA Inactivation Report COA Inactivation Report-File

Chartfield, Org Node and Vendor Inactivation Report

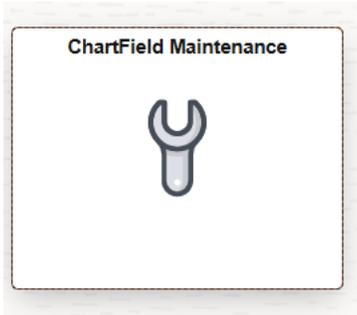
Please refer to the User Guide for important information and contacts for each transaction type [User Guide](#)

Business Unit: All Business Unit:

Type: **Chrtfield1** Value: Include all DeptID Activity [Find](#)

Trans Type	Business Unit	Transaction ID	Line	Dist	Org Node	Account	Fund	Dept
1								

1. Click on the “Chartfield Maintenance” tile and select the Chartfield 1 field.



2. Select the CF1 to be inactivated.

Chartfield1



Find an Existing Value

[+ Add a New Value](#)

Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches **Saved Searches** Choose from saved searches

*SetID = 10000

ChartField 1 begins with TSTCF1 **2**

Description begins with

Show fewer options

Case Sensitive Include History Correct History

Search Clear Save Search

3. Click on 'Include History'.
4. Click on the '+' sign to add a new row.

ChartField1



Chartfield1

UC Chartfield 1 Properties

UC BearBuy Authorizers

SetID 10000 ChartField 1 TSTCF1

Effective Date

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description		
02/26/2025	Active <input type="checkbox"/>	Test CF1	tstcf1	<input type="checkbox"/>	Attributes	Long Description	<input type="checkbox"/>	<input type="checkbox"/>
02/01/2025	Active <input type="checkbox"/>	Test CF1	tstcf1	<input type="checkbox"/>	Attributes	Long Description	4 <input type="checkbox"/>	<input type="checkbox"/>

Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers

3

5. Status: change the status from 'Active' to 'Inactive'. Update the 'Effective Date' on the new row. Click "Save".



SetID 10000

ChartField 1 TSTCF1

Effective Date



5

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
02/11/2025	Inactive	Test CF1	tstcf1	<input type="checkbox"/>	Attributes	Long Description
02/01/2025	Active	Test CF1	tstcf1	<input type="checkbox"/>	Attributes	Long Description

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

[Add](#) [Update/Display](#) [Include History](#)