

COMMON CHART OF ACCOUNTS – SYSTEMWIDE PROGRAM

PURPOSE

Program field associates transactions with a formalized set of ongoing systemwide or cross-campus/location activities. This chartfield does not currently exist at UC Berkeley. Examples of such programs to be reported: Natural Reserve System, CA Institute of Quantitative Biosciences (QB3), Center for Information Technology Research in the Interest of Society (CITRIS), Multicampus Research Units (MRU - White Mountain Research Center, Institute of Transportation Studies), UC Humanities Research Institute, and Global Health Institute.

To record specific UC systemwide program transactions in the general ledger, campus departments should use chartfield 1 (CF1) codes. Unique systemwide program UC0xxx CF1 values have been created in BFS and will be used for reporting ledger activity. For the full list of programs and unique CF1 codes, see [Systemwide Programs List](#).

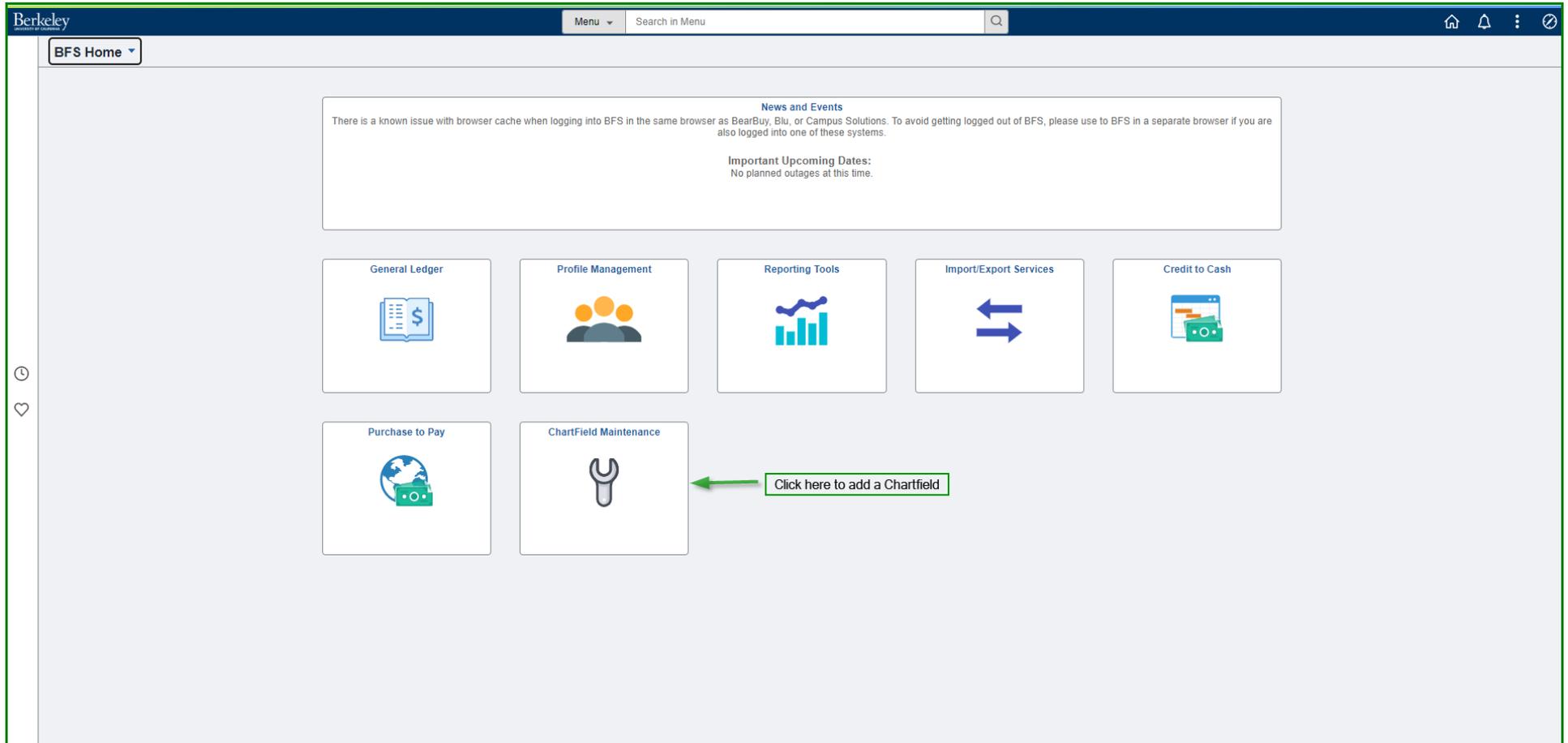
If you are unable to use these assigned CF1 codes for systemwide program activity due to conflicts with internal or other reporting needs, you can continue using your existing CF1 value if it is *exclusive* to a particular program code, but you will need to assign it the CF1 attribute "SYSTEMWIDE PROG" with appropriate Chartfield Attribute Value. CF1 attribute called "SYSTEMWIDE PROG" along with Chartfield Attribute Value that indicates a specific systemwide program will ensure that the data is picked up for reporting to UCOP.

If your unit is unable to use the assigned or existing CF1 code for systemwide program activity, you can create your own designated CF1 value with the CF1 attribute of "SYSTEMWIDE PROG" and Chartfield Attribute Value that indicates the specific systemwide program managed by the unit. You will need to update your templates, funding pages in UCPATH, and POs to include the newly created CF1.

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HOW TO ADD A SYSTEMWIDE PROGRAM ATTRIBUTE VALUE TO CHARTFIELD 1 (CF1)

To add a new Chartfield 1 value, select the **Chartfield Maintenance** tile in the BFS Home screen.



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Select ChartField 1

UCB Chartfield Maintenance

Define ChartField Value

ChartField Values

You do not have security privileges to access the ChartFields that are not hyperlinks.

Account

Alternate Account

Fund Code

Department

Function

Class Field

Product

ChartField 1

ChartField 2

ChartField 3

Project

Book Code

Adjustment Type

Scenario

Statistics Code

Select ChartField 1

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Confirm the new Chartfield 1 value is not an existing value by searching it in the **Find an Existing Value** tab.

The screenshot displays the 'Chartfield1' search interface. At the top, there is a navigation bar with 'UCB Chartfield Maintenance' and 'Chartfield1'. Below this, the 'Find an Existing Value' tab is selected. The search criteria are as follows:

- *SetID: = 10000
- ChartField 1: begins with ABC001
- Description: begins with

Buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' are visible. The search results area shows 'No matching values were found.' A green box highlights the search criteria, and a green arrow points from it to the search results. Another green box highlights the search results, and a green arrow points from it to the search criteria.

Search Criteria:

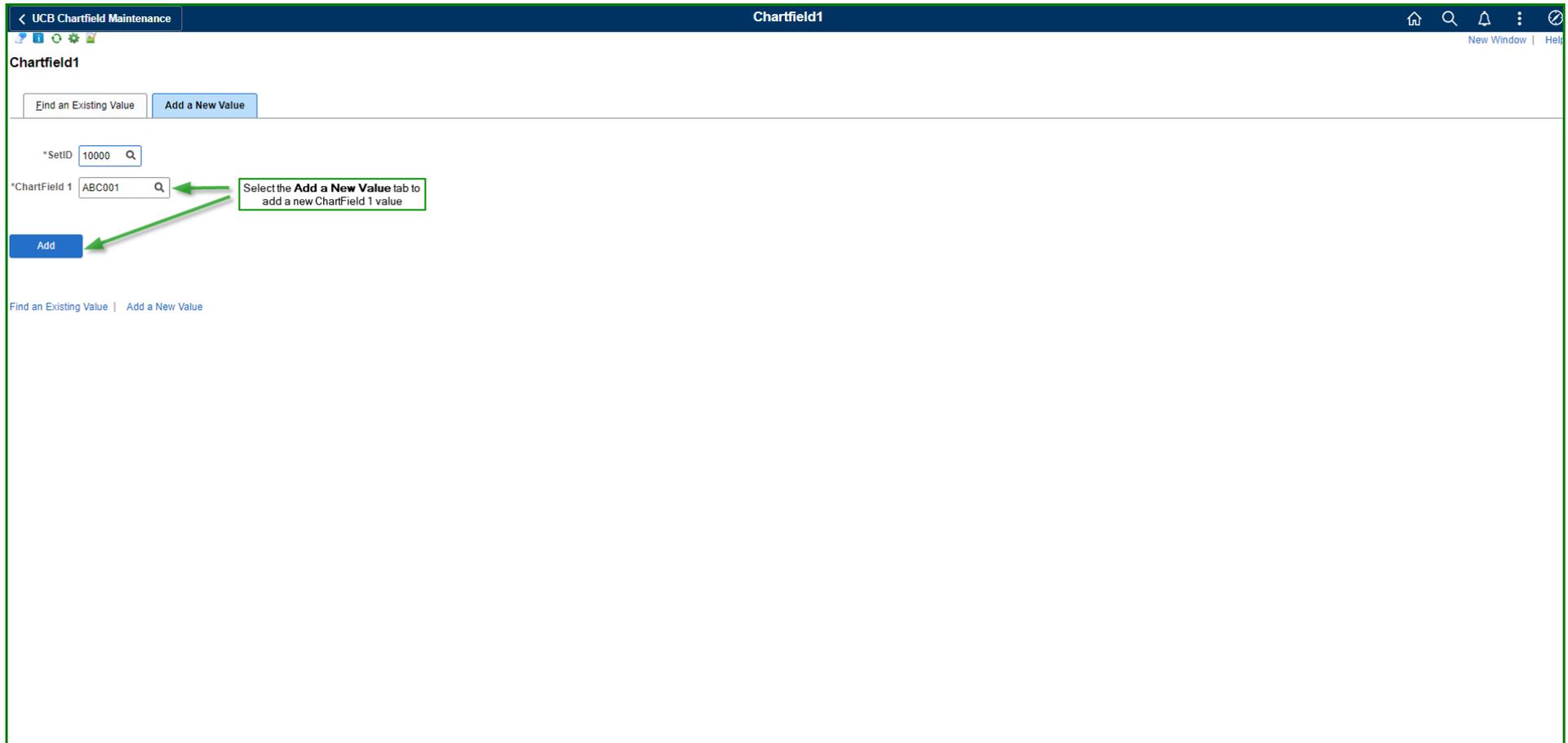
- *SetID: = 10000
- ChartField 1: begins with ABC001
- Description: begins with

Buttons: Search, Clear, Basic Search, Save Search Criteria

Results: No matching values were found.

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Select the **Add a New Value** tab to add the new Chartfield 1 value.



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Populate the **Description** and **Short Description** fields. Update the **Effective Date** as needed.

The screenshot displays the 'UCB Chartfield Maintenance' interface for 'ChartField1'. The page includes a navigation bar with 'UCB Chartfield Maintenance' and 'ChartField1', and a breadcrumb trail: 'Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers'. The main content area is titled 'ChartField 1' and shows 'SetID 10000' and 'ChartField 1 ABC001'. Below this is the 'Effective Date' section, which contains a table with the following columns: '*Effective Date', '*Status', '*Description', '*Short Description', 'Budgetary Only', 'Attributes', and 'Long Description'. The first row of the table has the following values: '03/09/2023' (with a calendar icon), 'Active', empty fields for '*Description' and '*Short Description', a checkbox for 'Budgetary Only', 'Attributes', and 'Long Description'. Below the table are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. Two callout boxes with green borders and arrows point to the table: one points to the 'Effective Date' field with the text 'Update the Effective Date as needed', and the other points to the '*Description' and '*Short Description' fields with the text 'Populate the required fields: Description and Short Description'.

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
03/09/2023	Active			<input type="checkbox"/>	Attributes	Long Description

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The **Effective Date** is updated and the **Description** and **Short Description** are populated.

The screenshot shows the 'UCB Chartfield Maintenance' application interface. At the top, there is a navigation bar with 'ChartField1' and 'UCB Chartfield Maintenance'. Below this, there are tabs for 'Chartfield1', 'UC Chartfield 1 Properties', and 'UC BearBuy Authorizers'. The main content area displays 'ChartField 1' with 'SetID 10000' and 'ChartField 1 ABC001'. A section titled 'Effective Date' contains a search bar and a table. The table has columns for '*Effective Date', '*Status', '*Description', '*Short Description', 'Budgetary Only', 'Attributes', and 'Long Description'. A single row of data is shown with the following values: '03/01/2023', 'Active', 'ABC Project Management', 'ABC Projec', a checkbox, 'Attributes', and 'Long Description'. The 'Effective Date', 'Description', and 'Short Description' fields in this row are highlighted with green boxes. Below the table are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. At the bottom left, there is a breadcrumb trail: 'Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers'.

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
03/01/2023	Active	ABC Project Management	ABC Projec	<input type="checkbox"/>	Attributes	Long Description

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Select **Attributes**

The screenshot displays the 'UCB Chartfield Maintenance' application. The main header shows 'ChartField1' and navigation options like 'New Window', 'Help', and 'Personalize Page'. Below the header, there are tabs for 'Chartfield1', 'UC Chartfield 1 Properties', and 'UC BearBuy Authorizers'. The main content area is titled 'ChartField 1' and shows details for 'SetID 10000' and 'ChartField 1 ABC001'. An 'Effective Date' section includes a search icon and a date field set to '03/01/2023'. Below this is a table with the following columns: '*Effective Date', '*Status', '*Description', '*Short Description', 'Budgetary Only', 'Attributes', and 'Long Description'. The first row of data contains: '03/01/2023', 'Active', 'ABC Project Management', 'ABC Projec', a checkbox, 'Attributes', and 'Long Description'. The 'Attributes' cell in this row is highlighted with a green box. Below the table are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A callout box with a green border and an arrow pointing to the 'Attributes' cell contains the text: 'Click **Attributes** to select a ChartField Attribute'.

*Effective Date	*Status	*Description	*Short Description	Budgetary Only	Attributes	Long Description
03/01/2023	Active	ABC Project Management	ABC Projec	<input type="checkbox"/>	Attributes	Long Description

Click **Attributes** to select a ChartField Attribute

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Click the magnifying glass icon inside the **ChartField Attribute** field to view a list of ChartField Attributes.

The screenshot displays the 'UCB Chartfield Maintenance' application interface. The main window shows 'ChartField 1' details, including SetID 10000 and ChartField 1 ABC001. A modal dialog titled 'ChartField Attributes' is open, showing a table of 'ChartField Attribute Values'. The table has the following columns: SetID, ChartField Value, Effective Date, Field Name, *ChartField Attribute, ChartField Attribute Value, and Attribute Value Description. The first row contains the values: 10000, ABC001, 03/01/2023, CHARTFIELD1, and empty fields for the last three columns. A magnifying glass icon is visible in the *ChartField Attribute field of this row. A green arrow points to this icon, with a callout box containing the text: 'Click the magnifying glass icon for a list of ChartField Attributes'. The dialog also includes 'OK' and 'Cancel' buttons at the bottom left.

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description
10000	ABC001	03/01/2023	CHARTFIELD1			

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Select **SYSTEMWIDE PROG** from the list.

The screenshot shows the 'UCB Chartfield Maintenance' application interface. The main window displays 'ChartField 1' properties, including SetID 10000 and ChartField 1 ABC001. A 'Look Up ChartField Attribute' dialog box is open, showing search results for 'ChartField Attribute' with 'SYSTEMWIDE PROG' highlighted. A green box and arrow point to 'SYSTEMWIDE PROG' with the text 'Select Systemwide Prog'.

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

Select Systemwide Prog

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Click the magnifying glass icon inside the **ChartField Attribute Value** field to view a list of ChartField Attribute values.

The screenshot displays the 'UCB Chartfield Maintenance' application interface. The main window shows the 'ChartField 1' configuration page. A modal dialog box titled 'ChartField Attributes' is open, showing a table of attribute values. The table has the following data:

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description
10000	ABC001	03/01/2023	CHARTFIELD1	SYSTEMWIDE PROG		

A magnifying glass icon is present in the 'ChartField Attribute Value' column of the table. A green box highlights this icon, and a callout box with an arrow points to it, containing the text: 'Click the magnifying glass for a list of ChartField Attribute values'. The dialog box also includes 'OK' and 'Cancel' buttons at the bottom left.

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Select the ChartField attribute value that indicates the specific systemwide program managed by your unit.

The screenshot shows the 'UCB Chartfield Maintenance' interface. A 'Look Up ChartField Attribute Value' dialog box is open, displaying search results for 'SYSTEMWIDE PROG'. The dialog includes fields for SetID (10000), Field Name (CHARTFIELD1), and ChartField Attribute (SYSTEMWIDE PROG). The search results table lists various attribute values and their descriptions. A green arrow points to the first result, '101 Natural Reserve System (NRS)', and a text box explains that the user should select the appropriate ChartField Attribute Value.

ChartField Attribute Value	Description
101	Natural Reserve System (NRS)
111	California Institute for Quantitative Biosciences (QB3)
112	Cal Institute for Tel and Information Tech (Calit2)
113	California Nanosystems Institute (CNSI)
114	Center Info Tech Rsrch in the Interest of Society (CITRIS)
171	White Mountain Research Center
173	Institute of Transportation Studies
175	California Advanced Solar Technologies Institute (UC Solar)
176	UC Observatories (UCO)
187	UC Humanities Research Institute (UCHRI)
191	Global health Sciences
201	Clinical and Translational Science Institute (CTSI)
221	Safety Programs
231	UC Education Abroad Program (UCEAP)
241	UC Washington Center (UCDC)
251	UC Center Sacramento
261	Agricultural Experimental Station

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If everything looks fine, click **OK**.

The screenshot shows the 'ChartField Attributes' dialog box. The table below contains the following data:

SetID	ChartField Value	Effective Date	Field Name	*ChartField Attribute	ChartField Attribute Value	Attribute Value Description
10000	ABC001	03/01/2023	CHARTFIELD1	SYSTEMWIDE PROG	221	Safety Programs

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. A green arrow points to the 'OK' button, and a text box next to it says 'If everything looks fine, click OK'.

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Select the **UC Chartfield 1 Properties** tab. Populate the **Start Date** and **End Date** fields as they are required. If there is manager/PI and long description information, populate those fields as well.

UCB Chartfield Maintenance | UC Chartfield 1 Properties

Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers

UC Chartfield 1 Properties

SetID: 10000 ChartField 1: ABC001

Effective Date: 03/01/2023 Status: Active

*Start Date: End Date: Load to CalPlan: N

Manager/PI:

Long Description:

Save Notify Add Update/Display Include History Correct History

Chartfield1 | UC Chartfield 1 Properties | UC BearBuy Authorizers

Select the **UC Chartfield 1 Properties** tab to populate the **Start Date**, **End Date**, and other information, e.g. Manager/PI, long description.

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Click **SAVE**

UCB Chartfield Maintenance UC Chartfield 1 Properties

Chartfield1 UC Chartfield 1 Properties UC BearBuy Authorizers

UC Chartfield 1 Properties

SetID: 10000 ChartField 1: ABC001

Effective Date
03/01/2023

Effective Date: 03/01/2023 Status: Active

*Start Date: 03/01/2023 *End Date: 02/29/2024 Load to CalPlan: N

Manager/PI: Smith, J

Long Description: To track cost share for ABC project.

Save Notify Add Update/Display Include History Correct History

Chartfield1 UC Chartfield 1 Properties UC BearBuy Authorizers

SAVE