Change ChartField2

Note: Appropriate BFS access established via the SARA process is required to do ChartField creation or maintenance. Your BFS (Berkeley Financial System) Home page might look different, depending upon your user access. Required fields are indicated by a * in front of the field title.

1. Click the Set Up Financials/Supply Chain link.
2. Click the Design ChartFields link.
3. Click the ChartField Values link.
   The ChartField Values page opens. There is a message about which ChartFields you have access to based upon your User ID and Security.
4. Click the ChartField2 link.
   The ChartField2 page opens.
5. Leave the SetID at the default value, 10000 (UC Berkeley).
6. Retrieve the page for specific ChartField2 value you want to change: use the ChartField2 or the Description field, or use “begins with” to narrow your search. Then click the Search button.
   The specific ChartField2 page appears. Make sure you have the correct ChartField2.

You must set a new Effective Date that records when the changes you are making take effect. NO changes can be made until a new Effective Date is established.

7. Add a new Effective Date row for the changes you are making: Click the + button at the right end of the most recent Effective Date row.
   This adds a new row, placing it at the top as it is the new most recent dated row.

The new Effective Date defaults to today's date, but it can be changed to an earlier date if desired (Remember: work in the GL items (Financial and Budget Journals and PRT) have the constraint of back dating only within an open month.)

8. Click in the Effective Date field on the top line (the most recent date)
   Highlight the date and press [Delete], then
   Enter your desired Effective Date into the field.

Steps 9 through 18 go through all the fields where changes can be made. You do not need to revise every field, but it is recommended that you update the Long Description field as described (see Step 18). BE SURE to check that all the fields reflect the new purpose of this ChartField2 value.

9. Revise the Description field (required) and enter the desired information into this maximum 30-character field. (The description will appear on BAIRS reports and is associated with ChartField2 in BFS as a drop-down or look up field.)
10. Move to the **Short Description** field (required) and enter the desired information into this maximum 10-character field.

11. Click the **Attributes** link

   The **Attributes** page opens.

12. Although they're primarily used for Contracts & Grants funds and faculty-managed balances, all CF2 values must have an Attribute. Click the **Lookup icon in the Attribute field** to see a list of Attribute codes. If the purpose of the CF2 value has changed, select the code that best defines the new purpose.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Definition of this Attribute code</th>
<th>note</th>
</tr>
</thead>
<tbody>
<tr>
<td>COST SHARE</td>
<td>cost share</td>
<td></td>
</tr>
<tr>
<td>FABRICATION</td>
<td>fabrication</td>
<td></td>
</tr>
<tr>
<td>FUND YEAR</td>
<td>funding period</td>
<td></td>
</tr>
<tr>
<td>NON C&amp;G ATTRIBU</td>
<td>This CF2 is not used for C&amp;G or faculty-managed balances</td>
<td></td>
</tr>
<tr>
<td>PI/FACULTY</td>
<td>PI or Faculty</td>
<td>When PI/FACULTY is selected an <strong>Attribute Value</strong> must also be selected – click the <strong>Lookup icon in the Attribute Value field</strong> and select the name/employee ID for the individual this CF2 value describes.</td>
</tr>
<tr>
<td>PROGRAM INCOME</td>
<td>program income</td>
<td></td>
</tr>
<tr>
<td>TASK/DELIVR/PHA</td>
<td>task/deliverable/phase</td>
<td></td>
</tr>
<tr>
<td>NONE OF ABOVE</td>
<td>none of the others for a C&amp;G fund</td>
<td></td>
</tr>
</tbody>
</table>

13. Select an **Attribute** (and Attribute Value, if required), then click **OK** to save your selection.

14. Click the **UC Chartfield2 Properties** tab.

   The **UC ChartField2 Properties** tab opens

15. If applicable, enter a **Start Date** (required) for this ChartField2 value.

16. If applicable, enter the **End Date** (required) for this ChartField2 value.

17. If applicable, enter revised information into the **Manager/PI** field. The valid format for Manager/PI name is:

   **last name, first name** [for example: Smith, Mary]

   If the name is not in this format you will get an error message when you Save.

18. Move to the **Long Description** field to enter text that explains why you’re making changes to this ChartField2. DO NOT change the **Long Description**: instead, add more information after the existing description, such as “As of XX date, this CF2 is used for…”

19. Click the **View All** link.

   Notice you can see all the **Effective Date** panels, each with a different **Effective Date**.

20. scroll to the bottom of the page and click the **Save** button.

**End of Procedure.** You have successfully revised a ChartField2.