

Entering a New Chartfield

Instructions on how to add a chartfield string are listed below:

1. **Login** to iLab at <https://ufl.corefacilities.org>
2. **Click** on the  icon
3. **Select** 'My Groups' and then the lab you are adding it to
4. **Click** on the 'Membership Requests & Peoplesoft Project Numbers' tab on the lab page
5. **Under** the 'Manage PeopleSoft Project Numbers' heading, **click** on the **blue** arrow next to 'Manually add a new UF Chartfield.' This will open and provide a field where you can type in the chartfield string in the **specified format**:

- a. You **must** enter the **entire** chartfield string in this format (**including dashes**):
 - i. **Department** (8 numerical characters)
 - ii. **Fund** (3 numerical characters)
 - iii. **Program** (4 numerical characters)
 - iv. **Budget reference** (5 alpha characters)
 - v. **Source of Funds** (8 alpha-numerical characters)
 - vi. **PC Business Unit** (5 alpha characters)
 - vii. **Project** (8 numerical or alpha-numerical characters)
 - viii. **Activity** (will usually be 1)
 - ix. **CRIS** (6 alpha-numerical characters)
 - x. **Department FLEX** (10 alpha-numerical characters)
 - xi. **UFID** (8 numerical characters)
- b. **Grants** **will always** be accompanied by an activity of 1
- c. If there are **missing fields**, they must be **replaced by a dash**. See examples below:
 - i. EXAMPLE 1: 29190100-209-2200-CRRNT-G000740-GRANT-00120752-1---16427444

EXAMPLE 2: 29190100-209-2200-CRRNT-G000880-GRANT-00083802-1---

EXAMPLE 3: 29190100-209-2200-CYFWD-F023400-----

Total number of fields (with or without dashes) must be 11.



Using '0' as a placeholder can sometimes be beneficial to ensuring you have the correct amount of dashes. Be sure to delete all placeholder '0's before clicking 'Add.' If you need any assistance, email ICBR at ICBR-iLab@ad.ufl.edu.

6. **Click Add.** The chartfield string will be added under the *Manage PeopleSoft Project Numbers* heading along with a list of the lab members.
7. **Check the box** to the right of the lab member's name to assign the chartfield. When the lab member requests services or schedules time on equipment, this chartfield may be selected to charge the service against.



Only a PI or Financial Manager can add a new chartfield or give access to other members.

