External UCs

How to change the default Chart String on your account:

At the top of your account homepage click “Profile”:

Under your Financial Account Information header:

Select “Change Your Default Account Number”:

This will create a window prompting you to enter your new account number; click in the empty account number field:
A pop-up window will open so that you may select your appropriate University from the drop down.

Select an account type

Choose an account type

UC Davis KFS account
Purchase Order
UCD Revenue Agreement Number
UC Berkeley
UC Irvine
UC Los Angeles
UC Merced
UC Riverside
UC San Diego
UC San Francisco
UC Santa Barbara
UC Santa Cruz

Once you select your University; click the blue hyperlink: “Create a new account.”

Select an account type

UC Berkeley

Type Description:

Select or create an account

search an account...

Create a new account

The page will expand, allowing you to enter in your Chart String information.

Click “Save”

If you have questions about your chart string, see our helpful information below.
Please enter your chart string information into each field in the proper order and format. Please do not add additional information in this area. If you need assistance with understanding your Chart String, please see your Fund/Grant manager or the Financial Control office for your campus.

Our team cannot assist you, as we do not hold your funds here on our campus.

The following page shows the format and mandatory fields for each University’s chart string information. If your chart string does not have all of these fields, please check back with your Fund Manager or Financial Controller before submitting any changes.

Legend:

() = number of characters

M = MANDATORY / REQUIRED

O = OPTIONAL

* = UCLA and UCM may have Cost Centers

** = If UCLA Account starts with 1, no need for Cost Center, Sub, & Object Code

*** = UCR revenue accounts start with R
<table>
<thead>
<tr>
<th>Campus</th>
<th>Full Accounting Unit</th>
</tr>
</thead>
</table>
| UCB (29) | Location (1) 1 or J M  
Account (5) numeric M  
Fund (5) numeric M  
Organization (5) numeric M  
Program (2) numeric M if account = 5xxxx  
Project (6) alphanumeric O  
Flexfield (5) alphanumeric O |
| UCSF (38) | Location (1) 2 or K M  
Business Unit (5) alphanumeric M  
Account (5) numeric M  
Fund (4) numeric M  
Dept ID (6) numeric M  
Project (7) alphanumeric or numeric M  
Activity Period (2) numeric O  
Function (2) numeric M  
Flexfield (5) alphanumeric O |
| UCD (38) | Location (1) 3, L, S, or H M  
Account (7) M  
Sub Account (5) O M  
Object (4) Sub Object (3) O  
Project (1-10) O  
Reference (8) O |
| UCLA (32) | Location (1) 4 or M M  
Account (6) numeric M  
Cost Center (2) alphanumeric M**  
Fund (5) numeric M  
Project (Up to 6) O  
Sub (2) numeric M**  
Object (4) numeric M**  
Source (Up to 6) alphanumeric O |
| UCR (30) | Location (1) 5 or N M  
Account (6) Numeric*** O  
Activity (6) alphanumeric M  
Fund (5) numeric M  
Function (2) numeric M  
Cost Center (4 or 5) alphanumeric O  
Project (5) alphanumeric O |
| UCSD (32) | Location (1) 6 or O M  
Index Number (7) alphanumeric M  
Fund (5 or 6) alphanumeric M  
Organization (6) numeric O  
Account (6) numeric M  
Program (6) numeric O |
| UCSC (32) | Location (1) 7 or P M  
Fund (5) numeric M  
Organization (6) alphanumeric or numeric M  
Account (6) alphanumeric or numeric M  
Program (2) numeric O  
Activity (Up to 6) alphanumeric O  
Doc Ref (up to 6) alphanumeric O |
| UCSB (25) | Location (1) 8 or Q M  
Account (6) numeric M  
Fund (5) numeric M  
Object (4) numeric M  
Sub (1) numeric M  
Reference (Up to 6) alphanumeric O |
| UCI (41) | Location (1) 9 or R M  
Account (7) alphanumeric or numeric M  
Fund (5) numeric O  
Sub (2) numeric O  
Object (4) alphanumeric or numeric M  
Reference (Up to 10) alphanumeric O  
Source (Up to 6) alphanumeric O  
Project (Up to 6) alphanumeric O |
| UCM (32) | Location (1) 0 or S M  
Account (6) numeric M  
Cost Center (2) alphanumeric M*  
Fund (5) numeric M  
Project (Up to 6) O  
Sub (2) numeric M  
Object (4) numeric M  
Source (Up to 6) alphanumeric O |
| M-OP (32) | Location (1) M M  
Account (6) numeric M  
Cost Center (2) alphanumeric O  
Fund (5) numeric M  
Project (Up to 6) O  
Sub (2) numeric M  
Object (4) numeric M  
Source (Up to 6) alphanumeric O |