Documented Naming Convention for ERSO Chartstrings

Chartfield 2 (flexfield):

CF2 uniquely identifies respective faculty’s research expenditures. ERSO requires that ALL expenditures include a CF2 as part of chartstring.

- ERSO will utilize the faculty’s assigned Academic Department CF2 as identifier for their research activity. Contact the Academic Department for the CF2.
- Exceptional PIs will be assigned CF2 beginning with “EE.” If no CF2 has been assigned, contact ERSO Budget Officer to request the creation of a new CF2.

Creating new CF2 in BFS
- Long Description: PI’s last name, first name preceded by PI’s Academic Department (e.g. BioE, CEE, CS, EE, IEOR, ME, MSE, NE) For example: Doe, John: BioE
- Short Description: PI’s last name, first name. For example: Doe, John

Chartfield 1 (Project Codes):

- CF1 created by ERSO should begin with “EE” and the remaining 4-characters are assigned at the discretion of the RSO. It should contain a comprehensible description of what subset is being identified (e.g. EEOVDH is specifically meant for deficit sweeps made in FY12).
- Base Operating Funds designated as matching funds for Sponsored Research must be tagged with a CF1 in order designate these sources as limited. The naming convention must begin with “3L” followed by 2-descriptive characters. The final 2-charaters denote the award cycle; for instance, the first year of the award is designated “01”, second-year, “02”, etc. Example: 3LC501, where “3L” is the campus designate, “CS” is a descriptive assigned by the RSO, and “01” is the first year cost share for the award (in this case, “CS” is “cost share”).

Creating new CF1 in BFS
- ChartField1: EExxxx
- Long Description: Description of what subset is being identified
- Short Description: Project Nickname

Creating new CF1 in BFS (for matching funds)
- Long Description: “Cost Share for Fund XXXXX,” “PI’s last name” “Year X” Example: Cost Share for Fund 12345, PI: King, Year 1
- Short Description: CS Fund 12345, Year 1
SpeedType:

- ERSO is opting to utilize speedtypes (rather than speedcharts) in anticipation of BearBuy implementation in February 2012.
- 10-character code to assign specific chartstring combination.

Creating a new Speedtype in BFS

- Assign unique Speedtype using ERSO speedtype naming convention* (see below).
- Description: Nickname of the project that PI will recognize. (The speedtype description will be associated with the speedtype in BearBuy).
- Enter chartstring combination associated with speedtype: Fund, Dept. ID, Program, Chartfield 1 (if applicable), and Chartfield 2.

ERSO Speedtype Naming Convention*

![Speedtype Diagram]

**EE XX XXXXX X**

- **Department Identifier**
- **Faculty Identifier**
- **Fund Number**
- **Project Field Indicator**

**Chartstring without project code** = X
**Chartstring with project code** = A
(Note that letters are not unique to each project code)

1**EE, NC or NF**
2Available at S:\ERSO-Central\PI Identifiers.xls

PI Identifier:
The PI Identifier is a two-character code unique to each PI; it is used for creating speedtype (see speedtype graphic above).
- The Master PI Identifier List is located in the S: Drive; for faculty who do not have an assigned PI identifier listed, contact ERSO Budget Officer to assign one.