Chartfield Lookups

Chartfield Lookups provide additional details related to the various Chartfields, such as OrgID, Fund, Account, Activity, and Project.

**Navigation can be done multiple ways through Management Reports:**
1. Through the *Management Reports* Criteria Page.
2. Through the various red hyperlinks found in management reports, including those located in the Criteria Header.

LEARN MORE

This guide covers hyperlinks located within the Summary of Revenue & Expense (Activities) and Revenue & Expense by Budget Category (Projects). See the *Management Reports for Activities and Projects* guide on the **Financial Services Training site** to see more Chartfield Lookups located within management reports.

Access from *Management Reports* Criteria Page

1 From *Management Reports* application, click the drop down menu next to "Chartfields" located on the top navigation bar and select the desired Lookup.
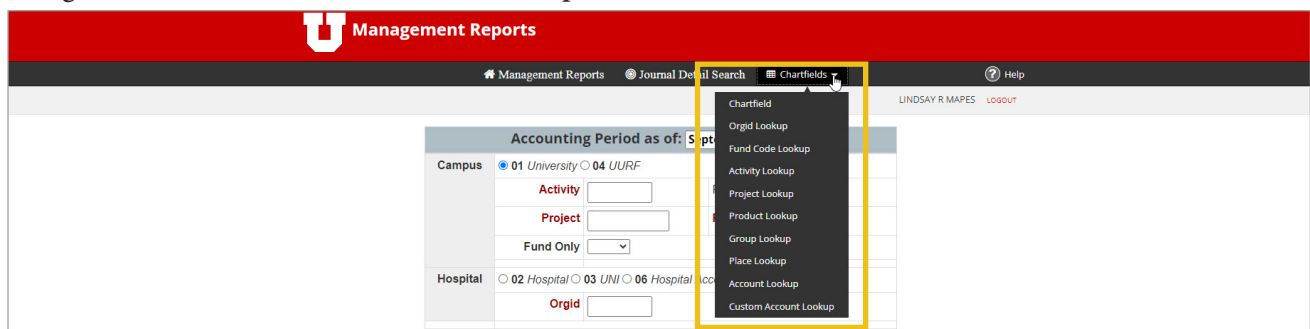
2 Enter search criteria and click the "Submit" button (*Activity Lookup* shown in screenshot).

LEARN MORE
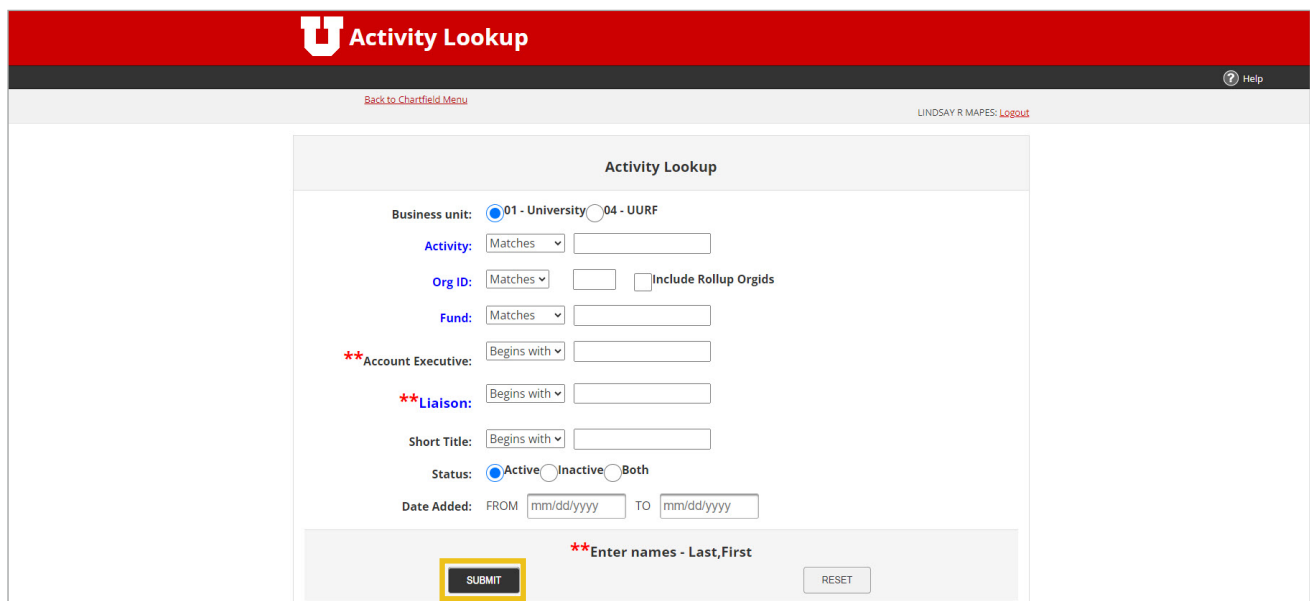
See the *Accessing Management Reports for Activities and Projects* video on the **Financial Services Training site** for steps to access the Management Report application.

Access from *Management Reports* Criteria Header

1 From any management report, click the desired red hyperlink to open the search screen/results for the related Chartfield Lookup.

Activities

A **"Activity" red hyperlink:** when clicked, opens the *Activity Lookup* search screen. Enter criteria to search for a specific Activity or view a list of Activities by Business Unit, OrgID, Fund, Account Executive, Liaison, Status, etc.

B **Activity Number red hyperlink:** when clicked, opens the *Activity Lookup* search results for the Activity and includes details, such as Fund, OrgID, Account Executive, and Liaison.

C **"Orgid" red hyperlink:** when clicked, opens the *Org Id Lookup* search screen. Enter criteria to search for all Orgs within the OrgID hierarchy (Rollup Structure) or a list of OrgIDs by Business Unit and/or Status (OrgID List).

D **OrgID red hyperlink:** when clicked, this opens the *Org Id Lookup* search results of all OrgIDs.

E **"Responsible Person" red hyperlink:** when clicked, this opens the *Activity Lookup* search results of all Activities for the Account Executive.
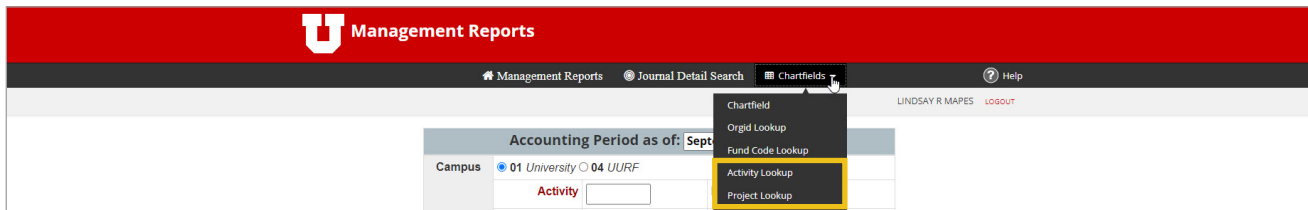
Projects

A **"Project" red hyperlink:** when clicked, opens the *Project Lookup* search screen. Enter criteria to search for a specific Project or a view list of Projects by OrgID, Account Executive/Principal Investigator, Agency Award Number, Proposal ID, Liaison, Status, etc.

B **Project Number, Award Number, and Proposal ID red hyperlinks:** when clicked, opens the *Project Lookup* search results for the Project and includes details, such as OrgID, Account Executive/Principal Investigator, and Liaison.

C **"Orgid" red hyperlink:** when clicked, opens the *Org Id Lookup* search screen. Enter criteria to search for all Orgs within the OrgID hierarchy (Rollup Structure) or a list of OrgIDs by Business Unit and/or Status (OrgID List).

D **OrgID red hyperlink:** when clicked, this opens the *Org Id Lookup* search results of all OrgIDs.

E **Agency Name red hyperlink:** when clicked, opens the *Project Lookup* search results of all Projects with the Agency Name.

F **"Responsible Person" red hyperlink:** when clicked, this opens the *Project Lookup* search results of all Projects for the Account Executive/Principal Investigator.
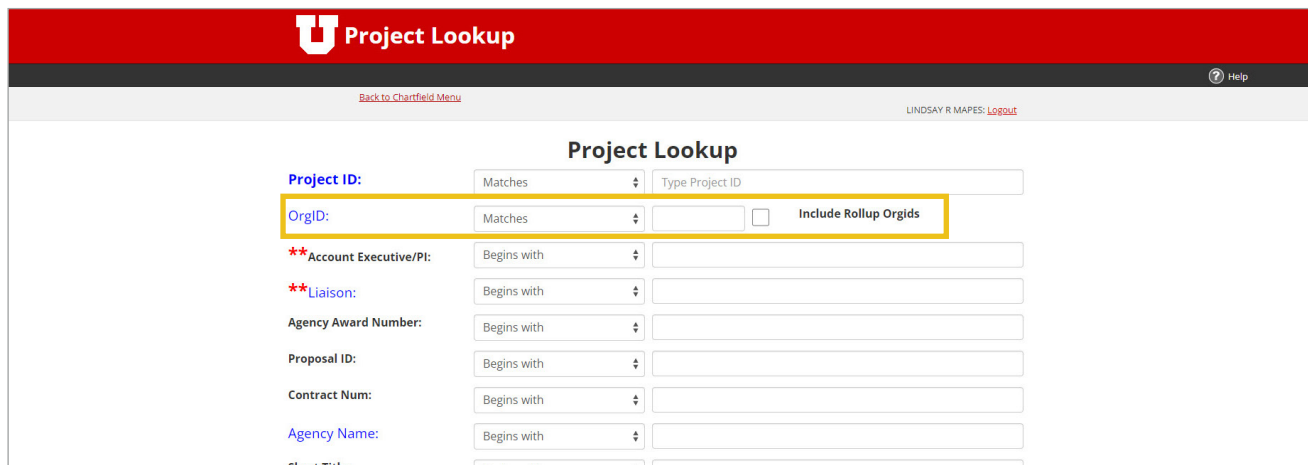
Example Use Cases for Chartfield Lookups

See a list of all Activities/Projects for my department/college (both active and inactive)
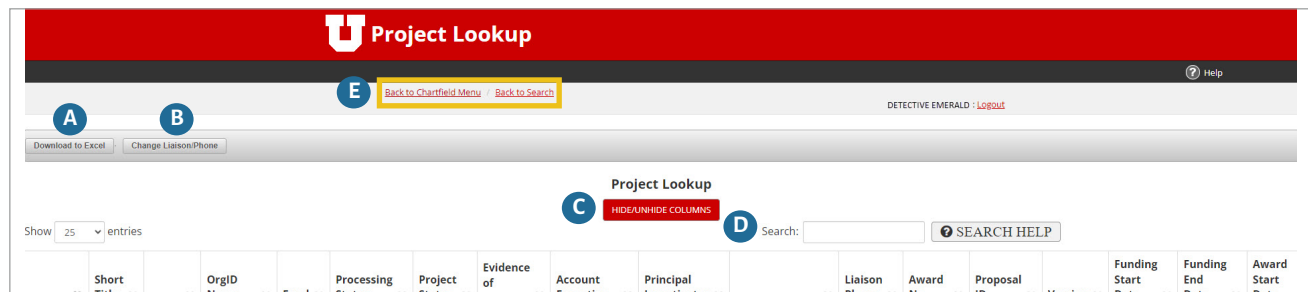
1 Select "Activity Lookup" or "Project Lookup" from the drop down menu.

2 Enter OrgID and click the "Submit" button. *NOTE: Check the "Include Rollup Orgids" to see all Activities/Projects within the Org structure/hierarchy.*

Navigate/Customize the Search Results

A **"Download to Excel" button:** when clicked, downloads the search results (all columns) in an Excel format.

B **"Change Liaison/Phone" button:** when clicked, another screen opens to enter the new Liaison for the selected Activities/Projects. *Note: Click "Cancel" to return to the previous screen.*

C **"Hide/Unhide Columns" button:** when clicked, another screen opens to hide or unhide columns from the search results screen. *Note: If downloaded to Excel, all columns, even those hidden will be downloaded.*

D **"Search" box:** enter a key term here to search the results.

E **Navigation buttons:** use red hyperlinks located in this section to return to a previous screen.

Example Use Cases for Chartfield Lookups Continued

See a list of all Activities/Projects that have been added this fiscal year for my department/college

1 Select "Activity Lookup" or "Project Lookup" from the drop down menu.

2 Enter the fiscal year dates in the "Date Added" *From* and *To* fields and click the "Submit" button.

See a list of all Funds in Business Unit 01 (University - Academic)

1 Select "Fund Code Lookup" from the drop down menu.

2 Click the "Display on Screen" button (or "Download to Excel" button).
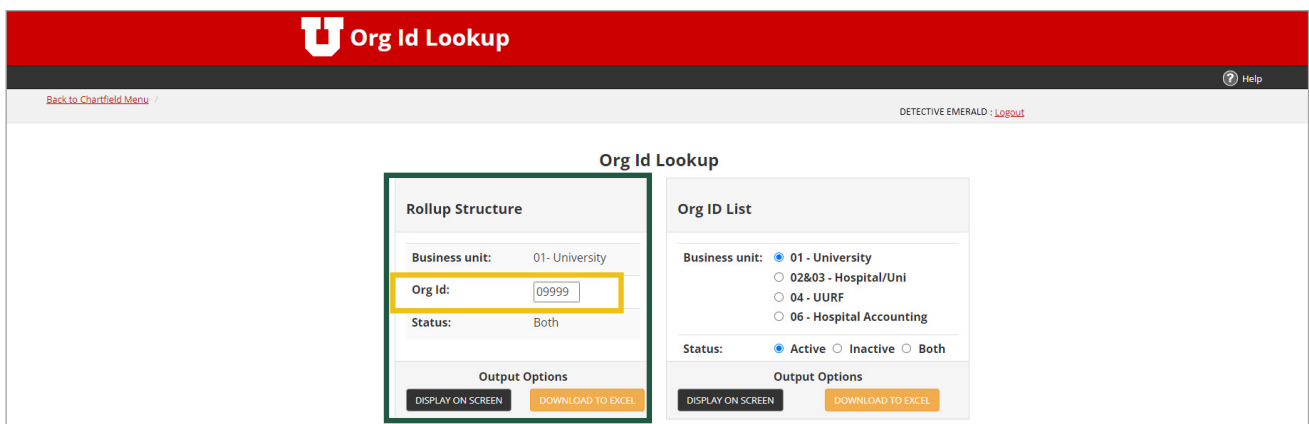
Example Use Cases for Chartfield Lookups Continued

See the Org structure for my department/college

1 Select "Orgid Lookup" from the drop down menu.
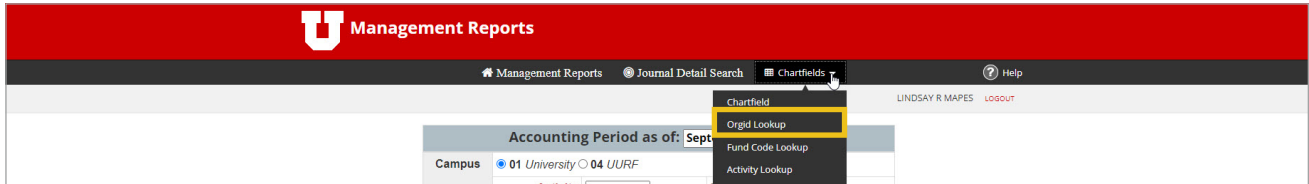
2 Enter your OrgID (five digits) in the *Rollup Structure* section and click the "Display on Screen" button (or "Download to Excel" button).

QUICK TIP To see a list of all OrgIDs, click the "Display on Screen" or "Download to Excel" button located in the *Org ID List* section.