Getting Started with the Chartfield Lookup Dashboard

The Cal Answers Chartfield Lookup dashboard provides approved Cal Answers Finance users with a comprehensive reference tool to research classifications of Accounts, Funds, Organizations, Program Code, Chartfield1, Chartfield2, Speedtypes and Project Costing (PC) Mapping. Review the Chartfield Lookup Wiki for report documentation details on each of the report pages and a data dictionary of terms.

Accessing the Cal Answers Chartfield Lookup Dashboard

1. Go to calanswers.berkeley.edu to log into the Cal Answers tool. Chrome or Firefox are the recommended browsers.
2. Click on the Log in to Cal Answers link on the Cal Answers Home page and when prompted enter your CalNet ID and passphrase. This will take you to the Home page of the Cal Answers application.
3. From the Financial Dashboards section, expand the Finance box by clicking on the + sign and then click the blue Chartfield Lookup link to display the dashboard.

Note: the Chartfield Lookup Dashboard is also available from the Cal Answers Dashboards dropdown in the blue toolbar.
Chartfield Lookup Dashboard Reports

1. Overview Tab

The Overview tab is the starting point for the Chartfield Lookup dashboard. It includes links to each of the reporting tabs (one tab for each chartfield), as well as descriptions of each tab. It also includes links to the Finance Chartfield Lookup Wiki which provides report documentation and a data dictionary for the filters and columns in the dashboard. The Help Desk email address is also included for easy access to support.
2. Account Lookup

Account is an interactive dashboard report that displays the hierarchy categorizations of all account codes used across the various account trees. This report helps you answer the questions "What account codes belong in Account Group/Category/Subcategory x?" and "To what Account Group/Category/Subcategory does account code x belong?". The Account Group, Account Category, and Account Subcategory values correspond to the values used in the Finance dashboard reports.

Account Tree prompt includes 3 options where the account codes are the same across trees, but how they roll up to higher levels, such as Account Category, may differ between trees:

- BFS_Account
- CGA_Account
- CalPlan_Account

Along with a view to the Foundation tree with unique account codes:

- FDN_Account

Make sure to match the Account Tree applied in the Cal Answers Finance dashboard to the Lookup Account Tree selection.
3. Fund Lookup
The Fund tab provides a lookup of the fund levels for the major trees in use for all fund codes. Filter options include Fund Code, Description and Status (Active or Inactive). The fund level values in the BFS view correspond to the BFS Fund Level2/3/4 values used in the Finance dashboard reports. The fund level 4 and 5 values in the CalPlan view correspond to the Fund Type and Fund Group values used in the dashboards. This tab does not include Foundation fund codes.

Select View to search for funds from the three fund trees BFS, G&G and CalPlan. The BFS Tree is the default view.

Active (A) Fund Status codes are displayed by default. Inactive is also available.

Select Fund Prompts and then click Apply to lookup. Prompts will not persist to other lookup tabs.
4. Organization Lookup
Use the Organization tab to answer "What DeptIDs roll up into Org Level X? or "What Org Level does DeptID X roll up under? The Org Level values correspond to the Org Level 2/3/4/5/6 values used in the Finance dashboard reports.

Select Organization Prompts and then click Apply to lookup. Prompts will not persist to other tabs.

Dept ID Status defaults to A, Active. Can also filter on I, Inactive Dept IDs.

Right-click in data table to Exclude column. No includable columns in the background but once you exclude a column, the Include column option is enabled.
5. Program Lookup

The Program Lookup interactive dashboard report provides program codes, descriptions and status for prompted values.

Select **Program Prompts** and then click **Apply** to lookup. Prompts will not persist to other tabs.

Program Status defaults to **A, Active**. Can also filter on **I, Inactive** Program Codes.
6. Chartfield 1 Lookup

Use the Chartfield 1 Lookup to find the descriptive attributes of all active and inactive Chartfield 1s. The CF1 Code, Description, Status and/or Manager prompts help you answer the questions "What is this Chartfield 1 used for?" and "Who owns or manages this Chartfield 1?"

- Use the More/Search option from the Prompt dropdown to find needed filter values.
- Fields also support free form typing with multiple values separated by a semi-colon.

Select Chartfield 1 tab specific prompts and then click Apply to lookup. Prompts will not persist to other tabs.
7. Chartfield 2 Lookup

The Chartfield 2 interactive dashboard pulls a short and long description, Code, Status and Effective Date of all chartfield 2s filtered by CF2 Code, Description and/or Status (Active – A or Inactive -I). Use this report to answer the question "For what purpose is this Chartfield 2 used?"

From the Prompt dropdown, select the More/Search option to find needed filter values.

Fields also support free form typing with multiple values separated by a semi-colon.

Select Chartfield 2 tab specific prompts and then click Apply to lookup. Prompts will not persist to other tabs.
8. Speedtypes Lookup

The Speedtypes Lookup tab displays the descriptions and chartstrings for Speedtype Keys or the shorthand codes created by units for frequently charged items. This lookup can be used to help you answer the questions "What is the chartstring for this speedtype key?" and "Which charges should I use this speedtype key?" Speedtype Keys are sourced from BFS.

Select Speedtypes Prompts and then click Apply to lookup. Prompts will not persist to other tabs.
9. PC Mapping Lookup

The PC Mapping interactive dashboard reports on the chartstrings and descriptions associated with project costing (PC) chartfields. Use this report to help you answer the questions "What chartstring is used for this project?" and "What is the description of this project?" The descriptions and chartstrings are sourced from BFS. C&G Managers and Research Administrators will find this lookup most useful.

Select PC Mapping Prompts and then click Apply to lookup. Prompts will not persist to other tabs.

PC Mapping is the only tab in the Chartfield Lookup with includable columns. Right-click in the table -> include column.