Chartfield Crosswalk Lookup (has moved 12/04/2014)

The following job aid describes how to use the Chartfield Crosswalk Lookup so you can find the Chartfield values for your SpeedType or use the Chartfield value(s) to find your SpeedType. This change is due to the page moving to a new webpage and being re-created due to the shutting down of the old server it ran on.

The link to the old webpage was either –

***https://inside.umassadmin.net/Finance/***

Or a link on one of your own Campus's Websites.

You clicked on either –

[Finance] or [HR]

Then click on [Reference]

Then select [Chartfield Lookup]
This took you to the old page:

ChartField Crosswalk Lookup

Instructions: Enter lookup criteria in the fields below. Enter as much as you like for as many criteria as you like. The more criteria you enter, the more likely you will find a match. (Don’t forget to delete any unwanted criteria from a previous search.)

- Use an underscore (_) as a wildcard to represent any character (e.g., 1_3_5)
- To select only Payroll-relevant ChartFields, check the box at the lower left.
- When you have entered your criteria, click Get Data to display matching ChartField values or click Download to save them to a Microsoft Excel file.

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Fund Description</th>
<th>Dept ID</th>
<th>Dept ID Description</th>
<th>Project/Grant Description</th>
<th>Program</th>
<th>Class</th>
<th>Speed Type</th>
</tr>
</thead>
</table>

Payroll-relevant ChartFields Only

Retrieve Data > Get Data > Download Excel File > Download
Now we have a new page and new link:

UMass Connect - Shared Applications

Look under [Other]
Click on - [Chartfield Lookup]

This takes you to the new page:
Step 1.
Select your Business Unit (= to the Setid), click on the looking glass and choose your Business Unit from the drop down list or just type in your Business Unit.

!!!Business Unit is required!!!
Step 2.

Enter your SpeedType:
(i.e. for the example I am using 123323)

Click on the [View Results] button

Downloading the output:
After viewing your results, you can download to Excel, CSV or XML
!!! If you don’t know the exact SpeedType or Chartfield Value, you will need to use the Wildcard (%) percent key.

In this example I only know the first three digits of the Speed Type. This brings back all those SpeedTypes that begin with 123, I added the wildcard 123% and then clicked on the [View Results] button
!!! If you don’t know the exact SpeedType or Chartfield Value, you will need to use the Wildcard (%) percent key.

In this example I only know the last two digits of the Fund (20). This brings back all those Funds that end with 20.

I added the wildcard %20 and then clicked on the [View Results] button.
!!! If you don’t know the exact SpeedType or Chartfield Value, you will need to use the Wildcard (%) percent key.

In this example I only know three numbers of the Project/Grant that comes between the first and the fifteenth number.

I added the wildcard before and after %154% and then clicked on the [View Results] button. This brings back every Project/Grant that contains the number 164.