Chart of Accounts Lookup - COAL

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1. What is COAL and why should I use it?

ECU’s Chart of Accounts Lookup (COAL) is a web-based tool providing an online searchable database of the Chart of Accounts. It may be used for identifying specific information associated with each of the flexfield segments as well as mapping old chart values to the current version (and vice versa). Users are also able to download the entire list of values for each chart segment into Excel spreadsheet format.

COAL can be accessed at [http://coal.ecu.edu.au](http://coal.ecu.edu.au)

2. Navigating COAL

1. The tabs at the top represent each of the flexfield segments in order.

2. The mapping tab allows mapping of the project and account segments, and the entire flexfield from the old Chart of Accounts structure to the new structure, and also from new to old.

3. The entire list of current values for any of the chart segments can be downloaded in an Excel spreadsheet.

4. **Enabled** – has a drop down list with a choice of ‘All’, ‘Yes’ or ‘No’. Yes, allows searching of all active segments only. No allows for searching of all inactive or closed segments. All allows for searching of both active and inactive segments simultaneously.

5. **Search Field** allows a choice of how you may search for a segment. This choice will vary according to what part of the chart structure you are looking for.

6. This is the section where you type in a known value, matching the format of the Search Field. Eg Project Number, you will need to enter a number. For Project Name, you would need to enter a name.

7. The **Search** button needs to be selected after all desired criteria have been entered. NOTE: Hitting the enter button after entering the desired criteria will not return any found data. The Search button must be used.

8. The **Clear** button will clear any previous search results found.

9. Any results will populate this table. The table categories will vary according to what segment or mapping tool is being used.
3. Tips and Tricks

3.1 Abbreviations used in this document

(B) = Button
(T) = Tab
(H) = Hyperlink

3.2 Using the wildcard (%)

The wildcard (%) can be used where not all information is known.

Example 1
- Smith% will return all data that starts Smith and ends with anything else.
- 123% will return any data that starts with 123 and ends with anything else.

Example 2
- %Smith will return any data that information before the word Smith else eg Dr Smith.
- %123 will return anything that ends with 123 eg 456123.

Example 3
- %Smith% will return any data that information before the word Smith and ends with anything else eg Dr Smithfield.
- %123% will return any data with 123, and information before and after this number eg 4561230

3.3 Populating the fields

Remember that all your fields must be populated for you to be able to search for a segment value or when mapping. In any field where you do not have any information, please enter the wildcard (%).

3.4 Next hyperlinks

If a search returns a large number of fields, they may not be able to be viewed on one page. Selecting the hyperlink, will take you to your next page of available fields.
4. Project Segment Searches

4.1 Search by Project Number

1. (T) Project
2. Enabled = All
3. Search Field = Project Number
4. Value = enter known project number or part thereof with wildcards
5. (B) Search
6. View result. Project Number 69600 is attached to Professional Development

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Cost Centers</th>
<th>Activities</th>
<th>Enabled</th>
<th>Start Date</th>
<th>Short Name</th>
<th>Coordinator</th>
<th>Location</th>
<th>File ID</th>
<th>Funding Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>69672</td>
<td>Expense Management System</td>
<td>E3T7</td>
<td>SC</td>
<td>Yes</td>
<td></td>
<td>ESM System</td>
<td>STEPHEN PELHAM</td>
<td>06</td>
<td>9598</td>
<td></td>
</tr>
</tbody>
</table>

4.2 Search by Project Name

1. (T) Project
2. Enabled = All
3. Search Field = Project Name
4. Value = enter known project name, or part thereof with wildcards
5. (B) Search
6. View result – choose the one that best matches for your use

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Cost Centers</th>
<th>Activities</th>
<th>Enabled</th>
<th>Start Date</th>
<th>Short Name</th>
<th>Coordinator</th>
<th>Location</th>
<th>File ID</th>
<th>Funding Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>05203</td>
<td>Professional Development A</td>
<td>T015</td>
<td>T0</td>
<td>Yes</td>
<td></td>
<td></td>
<td>RU009</td>
<td>02</td>
<td>9998</td>
<td></td>
</tr>
<tr>
<td>26103</td>
<td>Professional Development - P</td>
<td>0021</td>
<td>RD</td>
<td>Yes</td>
<td></td>
<td></td>
<td>KJ ENNNINGS</td>
<td>02</td>
<td>9999</td>
<td></td>
</tr>
<tr>
<td>26104</td>
<td>Professional Development - U</td>
<td>0021</td>
<td>RD</td>
<td>Yes</td>
<td></td>
<td></td>
<td>KJ ENNNINGS</td>
<td>02</td>
<td>9999</td>
<td></td>
</tr>
<tr>
<td>26106</td>
<td>Professional Development - G</td>
<td>0021</td>
<td>RD</td>
<td>Yes</td>
<td></td>
<td></td>
<td>KJ ENNNINGS</td>
<td>02</td>
<td>9999</td>
<td></td>
</tr>
<tr>
<td>30862</td>
<td>On-line professional develop</td>
<td>0326</td>
<td>RE</td>
<td>Yes</td>
<td></td>
<td></td>
<td>TIMOTHY MCD</td>
<td>01</td>
<td>9200</td>
<td></td>
</tr>
<tr>
<td>37206</td>
<td>Professional Development L</td>
<td>0372</td>
<td>TA</td>
<td>Yes</td>
<td></td>
<td></td>
<td>LEW TEMPS</td>
<td>02</td>
<td>9980</td>
<td></td>
</tr>
<tr>
<td>60030</td>
<td>Council Professional Dev</td>
<td>1615</td>
<td>All</td>
<td>Yes</td>
<td></td>
<td></td>
<td>DAVID LLOYD</td>
<td>06</td>
<td>9999</td>
<td></td>
</tr>
<tr>
<td>89000</td>
<td>Professional Development</td>
<td>2516</td>
<td>SA</td>
<td>Yes</td>
<td></td>
<td></td>
<td>CHARMAINE</td>
<td>04</td>
<td>9980</td>
<td></td>
</tr>
</tbody>
</table>
4.3 Search by Project Coordinator

1. (T) Project
2. Enabled = All
3. Search Field = Coordinator
4. Value = enter known project coordinator, or part there of with wildcards
5. (B) Search
6. View result – choose the one that best matches for your use

Search by Cost-Centres

1. (T) Project
2. Enabled = All
3. Search Field = Cost Centres
4. Value = enter known cost centre number, or part there of with wildcards
5. (B) Search
6. View result – choose the one that best matches for your use

This will show all projects attached to a cost centre.
### Project Number Search

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Category</th>
<th>Enabled</th>
<th>Contact</th>
<th>Coordinator</th>
<th>Location</th>
<th>File ID</th>
<th>Funding Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>00001</td>
<td>Int Loan CD Arts-Stagehouse</td>
<td>0540</td>
<td>Yes</td>
<td>Int Loan CD Arts-Stagehouse</td>
<td>THO CHAN, c2991</td>
<td>ALL</td>
<td>9990</td>
<td></td>
</tr>
<tr>
<td>00002</td>
<td>Int Loan Bunbury Faculty PCs</td>
<td>0540</td>
<td>Yes</td>
<td>Int Loan Bunbury Faculty PCs</td>
<td>THO CHAN, c2991</td>
<td>ALL</td>
<td>9996</td>
<td></td>
</tr>
<tr>
<td>00003</td>
<td>Int Loan Student Services Centre Network Upgrade</td>
<td>0540</td>
<td>Yes</td>
<td>Int Loan Student Services Centre Network Upgrade</td>
<td>THO CHAN, c2991</td>
<td>ALL</td>
<td>9998</td>
<td></td>
</tr>
<tr>
<td>00004</td>
<td>Int Loan Library Imprint Software</td>
<td>0540</td>
<td>Yes</td>
<td>Int Loan Library Imprint Software</td>
<td>THO CHAN, c2991</td>
<td>ALL</td>
<td>9998</td>
<td></td>
</tr>
</tbody>
</table>

*You may need to enter a partial value with the wildcard to return the associated projects.*
5. Cost Centre Segment Searches

5.1 Search by Cost Centre Number

1. (T) Cost Centre
2. Enabled = All
3. Search Field = Cost Centre Number
4. Value = enter known cost centre number or part thereof with wildcards
5. (B) Search
6. View result.

5.2 Search by Cost Centre Name

1. (T) Cost Centre
2. Enabled = All
3. Search Field = Cost Centre Name
4. Value = enter known cost centre number or part thereof with wildcards
5. (B) Search
6. View result.
6. Account Segment Searches

6.1 Search by Account Number

1. (T) Account
2. Enabled = All
3. Search Field = Account Number
4. Value = enter known account number or part thereof with wildcards
5. (B) Search
6. View result.

6.2 Search by Account Name

1. (T) Account
2. Enabled = All
3. Search Field = Account Name
4. Value = enter known account name or part thereof with wildcards
5. (B) Search
6. View result.
6.3 Search by Keyword

1. (T) Account
2. Enabled = All
3. Search Field = Key Words
4. Value = enter a keyword
5. (B) Search
6. View result.

6.4 Search by Additional Info

1. (T) Account
2. Enabled = All
3. Search Field = Additional Info
4. Value = enter known account name or part thereof with wildcards
5. (B) Search
6. View result.

Additional Information provides you with extra information regarding the use of certain account codes. For example, 0203 is only useable by Finance.
7. Activity Segment Searches

7.1 Search by Activity Code

1. (T) Activity
2. Enabled = All
3. Search Field = Activity Code
4. Value = enter known activity code or part thereof with wildcards
5. (B) Search
6. View result.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Name</th>
<th>Short Name</th>
<th>Enabled</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>Commercial Administration and Management</td>
<td>Commercial Administration and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CB</td>
<td>Consultancy (Non research)</td>
<td>Consultancy (Non research)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CC</td>
<td>Royalties, Patents and Licenses</td>
<td>Royalties, Patents and License</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CD</td>
<td>Professional Development and Training - Commercial</td>
<td>Professional Development and T</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CE</td>
<td>Business Undertakings</td>
<td>Business Undertakings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CF</td>
<td>Continuing Education &amp; Non Award Courses</td>
<td>Continuing Education &amp; Non Award</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7.2 Search by Activity Name

1. (T) Activity
2. Enabled = All
3. Search Field = Activity Name
4. Value = enter known activity name or part thereof with wildcards
5. (B) Search
6. View result.

<table>
<thead>
<tr>
<th>Activity Code</th>
<th>Name</th>
<th>Short Name</th>
<th>Enabled</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA</td>
<td>Commercial Administration and Management</td>
<td>Commercial Administration and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CD</td>
<td>Professional Development and Training - Commercial</td>
<td>Professional Development and T</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
8. Location Segment Searches

8.1 Search by Location Code

1. (T) Location
2. Enabled = All
3. Search Field = Location Code
4. Value = enter known location code or part thereof with wildcards
5. (B) Search
6. View result.

8.2 Search by Location Name

1. (T) Location
2. Enabled = All
3. Search Field = Location Name
4. Value = enter known location name or part thereof with wildcards
5. (B) Search
6. View result.
9. Company Segment Searches

9.1 Search by Company Code

1. (T) Company
2. Enabled = All
3. Search Field = Company Code
4. Value = enter known company code or part thereof with wildcards
5. (B) Search
6. View result.

9.2 Search by Company Name

1. (T) Company
2. Enabled = All
3. Search Field = Company Name
4. Value = enter known company name or part thereof with wildcards
5. (B) Search
6. View result.
10. **Mapping**

10.1 **Project Mapping**

Used to map old to new Project codes

1. (T) Mapping
2. (H) Project Map (on blue bar at top left hand side)
3. (H) Old to New OR (H) New to Old
4. Enter known values
5. Populate any unknown values with % (NOTE: Activity is case sensitive and must be in capitals)
6. (B) Search
7. View result.

10.2 **Account Mapping**

Used to map old to new and new to old Account codes

1. (T) Mapping
2. (H) Account Map (on blue bar at top left hand side)
3. (H) Old to New OR (H) New to Old
4. Enter known values
5. Enter known account code (old or new, depending on which way you would like to map)
6. (B) Search
7. View result.
10.3 Combinations

Used to switch between old and new flexfield combinations

8. (T) Mapping
9. (H) Combinations (on blue bar at top left hand side)
10. (H) Old to New OR (H) New to Old
11. Enter known values
12. Use wildcard % to populate unknown values
13. (B) Search
14. View result.

Please note, this will only return a result if the old combination had a balance or transaction against it in 2005. If nothing is returned for a combination, please try the ‘Project Map’ and the ‘Account Map’ individually and then combine.