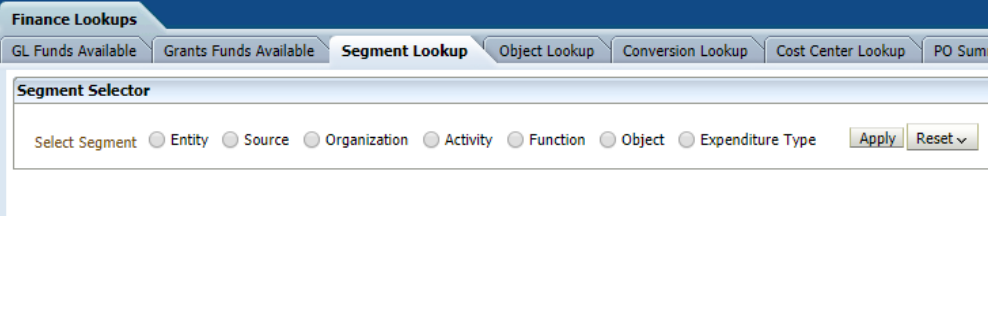## Segment Lookup Dashboard Page

The Segment Lookup dashboard page provides a detailed list of all segment values and the ability to fine results for each individual segment

Use Segment Lookup to view a list of values for each segment of the General Ledger.

All segments can be filtered by range of values, description, end date

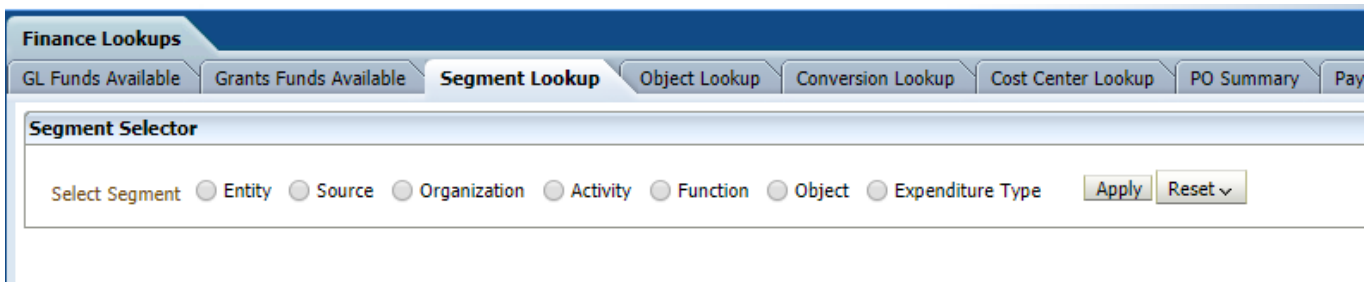Organization and Activity can also by filtered by Planning Unit.

Object can be filtered by Object Category

Segments	Definition
Entity	Identifies how the transaction is summarized for financial reporting (Ohio University, OU Foundation, etc.)
Source	Identifies how the transaction is funded (classified by restrictions)
Organization	Identifies who administers the funds, such as Planning Unit or department within the Planning Unit; organization is the lowest level value of the University structure.
Activity	Tracks internal purpose of spending; allows Planning Units to define purposes of spending related to their specific needs.
Function	Tracks purpose of spending; tracks why the transaction is occurring. Tracks high level spending classification as defined by the government or accounting standards (instruction, research, etc.)
Object	Defines what kind of transaction is taking place and delineates the values by account type for Assets, Liabilities, Fund Balance, Revenues, Expenses, and Transfers.
Expenditure Type	Defines what kind of transaction is taking place on Grant accounts (project-task-award) and is compromised of the Object Code plus Description.

Using Segment Lookup: Segment Selector

1. Click the **radio button** to select the desired segment. **NOTE:** You may only select one segment.

2. Click **Apply**.

Using Segment Lookup: Selecting Prompts for Entity, Source and Function

After you select the appropriate radio button and click apply, a prompt window will appear with additional filter criteria.

1. The following search criteria will display for the ENTITY, SOURCE, and FUNCTION segments. If no search criteria is defined, all values defined for that segment will be returned.

   - *Between:* Allows you to filter between a range of segment values

   - *Desc contains any:* allows you to search segment values based on the segment description. This prompt will return all segment values where the segment description contains the entered text.

   - *Show End-Dated:* When "No" is selected, the system will not return results that are currently end-dated.

     i. *This dashboard is refreshed nightly, so this will return any values that are active/inactive as of the previous day.*

2. Enter your search criteria and click **Apply**.

Finance Lookups

| GL Funds Available | Grants Funds Available | **Segment Lookup** | Object Lookup | Conversion Lookup | Cost Center Lookup | PO Summary | Payments | Equipment Inventory |

Segment Selector

Select Segment ⦿ Entity ○ Source ○ Organization ○ Activity ○ Function ○ Object ○ Expenditure Type   [Apply] [Reset ⌄]

Prompts

Entity Between [____] - [____]   Entity Desc contains any [____]   Show End-Dated? [No ▾] [Apply] [Reset ⌄]

Entity

ENT LVL A #/Desc	ENT LVL B #/Desc	ENT LVL C #/Desc	ENT LVL D #/Desc	Entity	ENT Desc	ENT Start	ENT End
A0 ALL OHIO U ENTITIES	B1 OHIO UNIVERSITY	C1 OHIO UNIVERSITY	D1 OHIO U GENERAL	10	GENERAL		
A0 ALL OHIO U ENTITIES	B1 OHIO UNIVERSITY	C1 OHIO UNIVERSITY	D1 OHIO U GENERAL	11	WOUB		
A0 ALL OHIO U ENTITIES	B1 OHIO UNIVERSITY	C1 OHIO UNIVERSITY	D1 OHIO U GENERAL	12	ENDOWMENTS		
A0 ALL OHIO U ENTITIES	B1 OHIO UNIVERSITY	C1 OHIO UNIVERSITY	D1 OHIO U GENERAL	13	INTERNAL BANK		
A0 ALL OHIO U ENTITIES	B1 OHIO UNIVERSITY	C1 OHIO UNIVERSITY	D1 OHIO U GENERAL	14	CENTURY BOND BANK		

Using Segment Lookup: Selecting Prompts for Organization

After you select the ORGANIZATION radio button and click apply, a prompt window will appear with additional filter criteria. In addition to the search criteria defined for the ENTITY, SOURCE, and FUNCTION segments, the ORGANIZATION segment has a *Planning Unit* prompt.

1. Select the Planning Unit from the Dropdown.

2. Enter your search criteria and click **Apply**.

This will return Organization results specific to that planning unit. The example below shows all organization values for the Planning Unit: College of Fine Arts as well as the hierarchy for each organization value.

Segment Selector

Select Segment ○ Entity ○ Source ⦿ Organization ○ Activity ○ Function ○ Object   [Apply] [Reset ⌄]

Prompts

Organization Between [____] - [____]   Organization Desc contains any [____]   Planning Unit [C15000 FINE ARTS ▾]   Show End-Dated? [No ▾] [Apply] [Reset ⌄]

Organization

ORG LVL A0 #/Desc	ORG LVL A #/Desc	ORG LVL B #/Desc	ORG LVL C #/Desc	ORG LVL D #/Desc	ORG LVL E #/Desc	Organization	ORG Desc	OR St
A00000 ALL ORGANIZATIONS	A10000 PROVOST - ACADEMIC	B10000 ATHENS COLLEGES & SCHOOLS	C15000 FINE ARTS	D15000 FINE ARTS (ATHENS)	E15010 DEAN'S OFFICE	150100	DEAN FINE ARTS	
A00000 ALL ORGANIZATIONS	A10000 PROVOST - ACADEMIC	B10000 ATHENS COLLEGES & SCHOOLS	C15000 FINE ARTS	D15000 FINE ARTS (ATHENS)	E15010 DEAN'S OFFICE	150120	CREATE_SPACE	

Using Segment Lookup: Selecting Prompts for Activity

After you select the ACTIVITY radio button and click apply, a prompt window will appear with additional filter criteria. In addition to the search criteria defined for the ENTITY, SOURCE, and FUNCTION segments, the ACTIVITY segment has a *Planning Unit* prompt.

1. Select the Planning Unit from the Dropdown.
   - Selecting "SHARED ACTIVITIES" will return a list of all the shared activity values available to all Planning Units
   - Selecting a specific planning unit such as "ARTS & SCIENCES" will return the list of all activity values specific to the College of Arts & Sciences. (EXAMPLE BELOW)
2. Enter your search criteria and click **Apply**.

Prompts

| Activity Between | - | Activity Desc contains any | | Planning Unit | ARTS & SCIENCES |

Activity

ACTV LVL A #/Desc	ACTV LVL B #/Desc	Activity	ACTV Desc	ACTV Start	ACTV End
A000 ALL ACTIVITIES	B120 ARTS & SCIENCES	1200	ALUMNI OUTREACH		
A000 ALL ACTIVITIES	B120 ARTS & SCIENCES	1210	PAYROLL ACCRUAL		
A000 ALL ACTIVITIES	B120 ARTS & SCIENCES	1220	SOMAVERT ROYALTIES		

Using Segment Lookup: Selecting Prompts for Object

After you select the OBJECT radio button and click apply, a prompt window will appear with additional filter criteria. In addition to the search criteria defined for the ENTITY, SOURCE, and FUNCTION segments, the OBJECT segment has an Object Category prompt. This will filter results based on the specific object categories: Assets, Liabilities, Fund Balances, Revenues, Expenses, and Investment Transfers.

1. Select the *Object Category* from the Dropdown.
   - You can also enter details in the description prompt for more granular results.
2. Enter your search criteria and click **Apply**.

In the example below, the "Expense" object category was selected and the word "Travel" was entered in the "*Desc contains any*" prompt. The values returned are all expense object codes that include the word "travel" in the description. Note: this field will search all parent and child object descriptions.

Prompts

| Object Between | - | Object Desc contains any | Travel | Object Category | EXPENSES | Show End-Dated? | No | Apply | Reset |

Object

OBJ LVL A0 #/Desc	OBJ LVL A #/Desc	OBJ LVL B #/Desc	OBJ LVL C #/Desc	OBJ LVL D #/Desc	OBJ LVL E #/Desc	OBJ LVL F #/Desc	Object	OBJ Desc	O SI
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718110	AIRFARE - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718115	CHARTER - AIR TRANSPORTATION - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718120	GROUND TRANSPORTATION - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718125	CHARTER - GROUND TRANSPORTATION - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718130	RENTAL CAR - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718140	OTHER TRAVEL - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718150	LODGING - DOMESTIC	
A00000 ALL OBJECTS	A70000 EXPENSES	B71000 SUPPLIES AND SERVICES	C71800 TRAVEL & ENTERTAINMENT	D71810 TRAVEL - DOMESTIC	E71800 TRAVEL - DOMESTIC		718160	MEALS & INCIDENTALS -DOMESTIC	