1 Selection Criteria used in TechOne enquiry screens

This is a list that summarises the criteria that can be used to filter enquiries and reports in TechOne. These criteria are available to use in EIE enquiries, GL enquiries, BI enquiries and extended criteria when running XLOne & Crystal reports from the system.

TechnologyOne Financials - Selection Codes   As at 22 Aug 2019

Legend

Recommended selection code for quick financial reporting (in addition to Ledger and components of the Account Number)

Selection code has been superseded

Selection Code	Example	Description
Ledger Name	19GLA	Identifies the data source (##GLA for actuals and ##BUD for budget, where ## = last two digits of the year)
Account Number	01032015180951	Combines: Entity & Cost Centre & Project & Natural Account
Account Number (Edited)	01.032.01518.0951	As above but formatted with full stops between each
Short Description	Income	Natural account short description
Description	Flinders Uni Fin Admin FSD Operating Income	Combines short description of: Entity & Cost Centre & Project & Natural Account
Entity	01	Identifies the business entity
Cost Centre	032	Identifies the business unit within the entity
Project	01518	Identifies a specific project of work within the business unit
Cost Centre/Project	03201518	Combines: Cost Centre & Project
Natural Account	0951	Identifies the type of income or expenditure
Project Category	010	Attribute of a Project to identify the research type (various CAT1 to CAT4 categories)

Funds top level	UNTIED	Attribute of a Project to identify the funding nature as Untied or Tied
Fund type	OU	Attribute of a Project to identify the funding nature as Operating, Research or Trading within the Untied or Tied categories above
Uni Source	001	Attribute of a Project to identify the funding source
Uni Project Manager	0166	Attribute of a Project to identify who is sent the monthly project report and who needs access to finance dashboards
Uni Project Group	CFWD	Attribute of a Project used for internal or custom reporting
Uni Account Type	10	Attribute of a Natural Account to identify the type as Profit & Loss or Balance Sheet
Uni Acct Class	10	Attribute of a Natural Account to identify the type as Revenue, Expense, Asset, Liability or Equity
Uni Acct Category	10	As above but further breaks down the Balance Sheet categories into Current and Non Current
Uni Acct Group	010	As above but further breaks down the Revenue & Expense categories e.g. Salaries vs. Non Salaries
Uni Acct Sub Group	010	As above but further breaks down the Revenue & Expense categories e.g. CGS
College Level 1	20000	Attribute of a Cost Centre to provide Organisation structural groups at the highest level
College Level 2	26000	Attribute of a Cost Centre to provide reporting structural groups at the next level of detail (College/Portfolio level)
College Level 3	26400	Attribute of a Cost Centre to provide reporting structural groups at the next level of detail
College Level 4	26410	Attribute of a Cost Centre to provide reporting structural groups at the lowest level of detail
FFS Level 1	1000	Attribute of a Natural Account to identify the type according to new internal reporting requirements
FFS Level 2	1010	As above but further breaks down the categories e.g. Academic vs. Non Academic

FFS Level 3	1011	As above but further breaks down the categories (intended to be Financial Statement Notes level of detail)
Business Level 1		Superseded by College Levels
Business Level 2		Superseded by College Levels
Business Level 3		Superseded by College Levels

To use these criteria, click the drop down box in the search area of the enquiry you are using and choose the criteria. Then click on the magnifying glass symbol to display the values available in that criteria. It is also possible to change the operator value in the middle box to = or > for example.

See below for an example of seeing the available values for particular criteria.

General Ledger Balances

Ledger Name:* [19GLA] [🔍] GL Actuals 2019

Enter search criteria and click retrieve

Search: [_____] 🔖Retrieve 🔖Saved Search ☑Only sh

College Level 2 [▾] like [▾] [_____] [🔍] ✕

Add Criteria   Clear Criteria   Clear Values   Save Search   Load Search   Apply to Grid

Selection Code (TBPCK012)

🔍 | ❓ help | 🧹 clear | 📂 retrieve

Selection Code

Search: [_____] 🔖Retrieve 🔖Saved Search

| Selection Type | [▾] | = | [▾] | COLL2 |
| Status | [▾] | = | [▾] | Active [▾] |

Add Criteria   Clear Criteria   Clear Values   Save Search   Load Search

Drag a column header here to group by that column

Selection Code	Short Description	Description	
10000	Portfolios	Portfolios	
11000	DVC Research	Deputy Vice-Chancellor (Research)	A
12000	PVC International	Pro Vice-Chancellor (International)	A
13000	DVC Academic	Deputy Vice-Chancellor (Academic)	A
14000	Corp Services	Corporate Services	A
15000	VC Portfolio	Portfolio of the Vice-Chancellor	A
16000	DVC Students	Deputy Vice-Chancellor (Students)	A
21000	M&PH	College of Medicine and Public Health	A
22000	N&HS	College of Nursing and Health Sciences	A
23000	S&E	College of Science and Engineering	A
24000	EP&SW	College of Education, Psychology and Social Work	A
25000	BG&L	College of Business, Government and Law	A
26000	HA&SS	College of Humanities, Arts and Social Sciences	A
28000	Multi College	Multi College	

Count: 36

[OK] [Cancel]