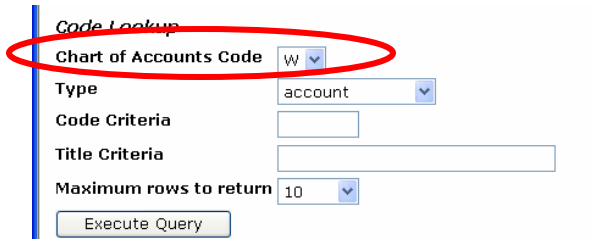


Step-by-Step Guide to Code Lookup

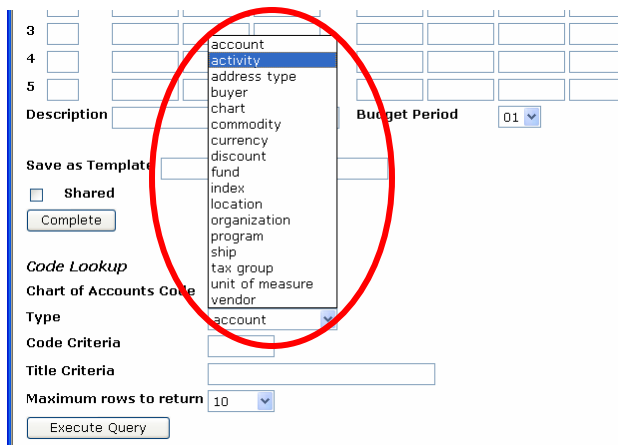
Use the Code Lookup to find the correct code for many of the fields on any form. The Code Lookup is at the bottom of the Purchase Requisition and Expense/Budget Transfer form. (Figure 1)



The screenshot shows the 'Code Lookup' section of a form. The 'Chart of Accounts Code' dropdown menu is highlighted with a red circle and contains the letter 'W'. Other fields include 'Type' (set to 'account'), 'Code Criteria', 'Title Criteria', and 'Maximum rows to return' (set to 10). An 'Execute Query' button is at the bottom.

Figure 1

1. **Chart:** The default **W** for WSU should automatically be filled in for the chart. (Figure 1)
2. **Type:** Select the name of the field for which you need the code. For example: *Vendor – if you are searching for the Vendor ID.* (Figure 2)



The screenshot shows the 'Code Lookup' section with a dropdown menu open. The menu lists various field types: account, activity, address type, buyer, chart, commodity, currency, discount, fund, index, location, organization, program, ship, tax group, unit of measure, and vendor. The 'activity' option is highlighted. The 'Chart of Accounts Code' field contains 'W' and the 'Type' field is set to 'account'. An 'Execute Query' button is at the bottom.

Figure 2

3. Enter your search criteria:
 - If you know part of the actual code, use the **% wildcard** to search for the code in the Code Criteria field. For example: If you are searching for the account code and know it begins with 73, enter 73%. This will return the list of all account codes starting with 73.

-OR-

- If you don't know the code, but know the description use the wildcard to search using part of the name in the Title Criteria field. For example: If you are searching a vendor and know the name is Business Furniture Outlet, enter %Business% in the Title Criteria field. It is best to use just part of the name with the % wildcard in front and behind the word. This search is also case sensitive, so enter the first letter of the word as a capital letter and the rest in lower case. This will return the list of all vendors that have the word Business anywhere in the description.

4. For the maximum rows, select a number that you believe is larger than the number of items you expect to be found. (Figure3) If you select 10, and there are 15 matches, you will only see the first 10 items.

The screenshot shows the 'Code Lookup' form with the following fields:

- Chart of Accounts Code: W
- Type: vendor
- Code Criteria: (empty)
- Title Criteria: %Business%
- Maximum rows to return: 10 (with a dropdown menu open showing options: 10, 25, 50, 75, 100, 1000, 10000)
- Execute Query button

 A red circle highlights the 'Maximum rows to return' dropdown menu. At the bottom of the form, there are navigation links: [Approve Documents | Document | Create Expense or Budget Encumbrance | Wsu Fin] and the text 'RELEASE: 7.0'.

Figure 3

5. Click on the **Execute Query** button. Do **NOT** hit the enter key.
6. The results of your search will appear at the top of your form. (Figure 4) You can scroll through the list to find the best match. Scroll further down to get back to your form. If you need to adjust your search, just scroll back to the bottom of the form.

The screenshot shows a table titled 'code lookup results' with two columns: 'Vendor ID' and 'Name'. The table contains a list of vendors, including:

- U00001090: ABS Business Products Inc
- U00001324: American Business Center
- U00001626: Battle of the Businesses
- U00001653: Business Journal
- U00001654: Business Objects
- U00001655: Business Plans Inc
- U00001656: Business Week
- U00002001: Central Business Group
- U00002117: Clary Business Machines
- U00002212: Community Col Business officer
- U00002244: Consolidated Business Products
- U00002546: Discover Business Services
- U00002599: Duke Marine Lab-Business Ofc
- U00002887: Friends Business Source
- U00002900: Future Business Leaders of
- U00002915: Gateway Business
- U00003305: Institute Business Appraisers
- U00003423: Journal of Business & Economic
- U00003440: Just Business! Inc
- U00003546: Lake Business Products Inc
- U00004315: NKU College of Business Fdn
- U00004477: Ohio Business Dev Org Inc
- U00004478: Ohio Business Teachers Assoc
- U00004772: Primade Business Services

Figure 4