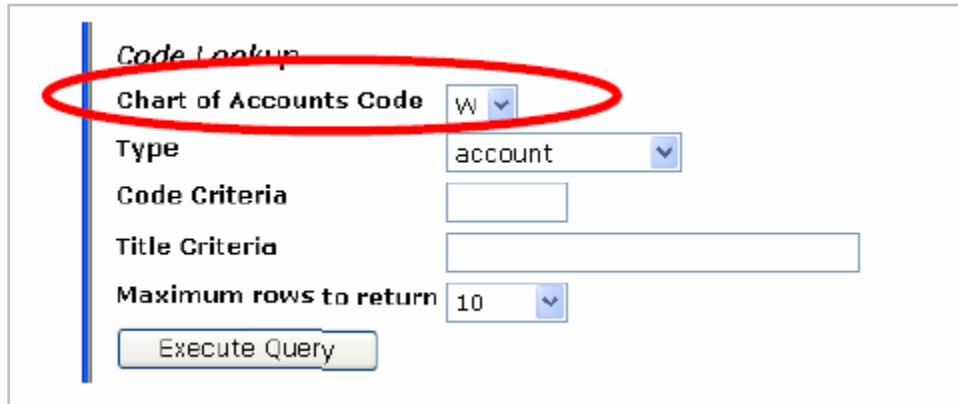


Step-by-Step Guide to Code Lookup

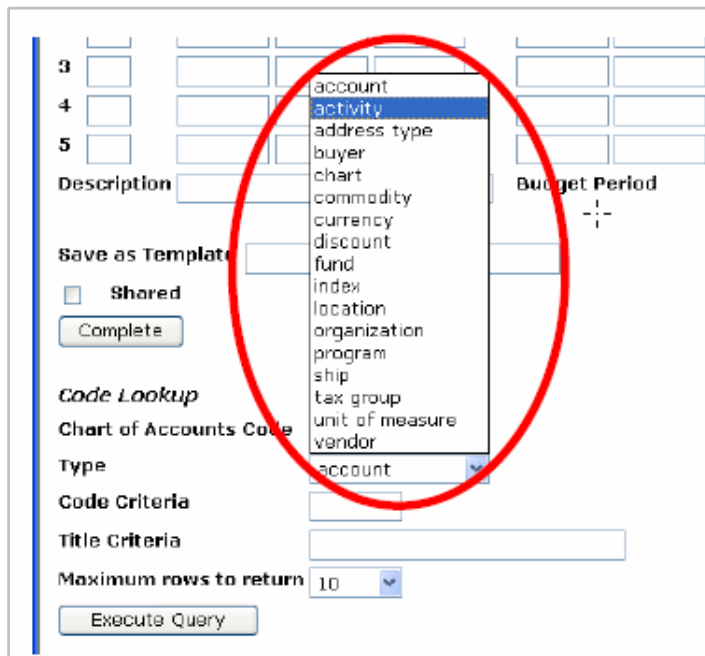
Use the Code Lookup to find the correct code for many of the fields on any form. The Code Lookup (Figure 1) can be found on the WSU Finance Extensions link.



The screenshot shows the 'Code Lookup' form. The 'Chart of Accounts Code' dropdown menu is highlighted with a red oval 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 type of the field for which you need the code. For example: Account – if you are searching for the account code. (Figure 2)



The screenshot shows the 'Code Lookup' form with the 'Type' dropdown menu open. The 'account' option is highlighted with a blue background and circled in red. The dropdown 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. Other fields are visible in the background, including 'Chart of Accounts Code' (set to 'W') and 'Maximum rows to return' (set to '10').

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 for computer supplies, enter **%Supplies** 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 account title descriptions that have the word "supplies" 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.

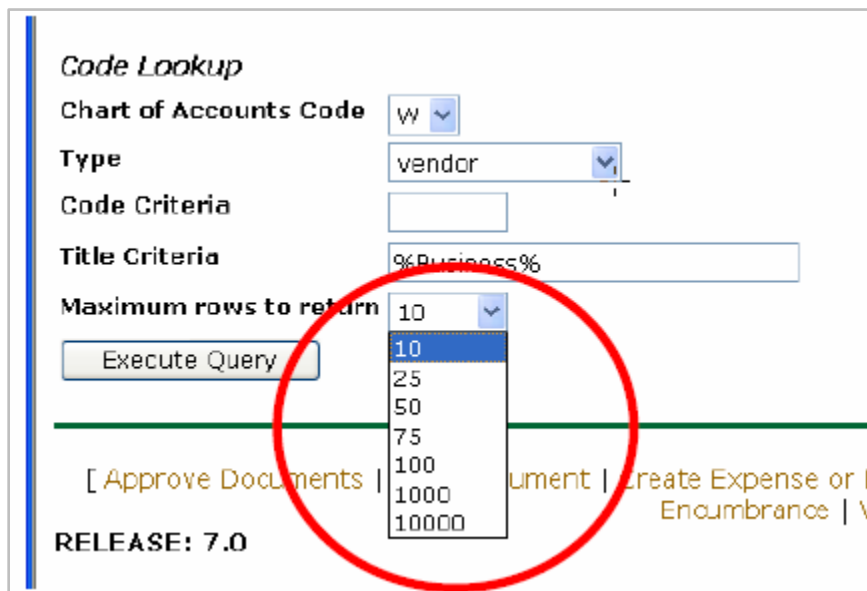


Figure 3

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.

Code lookup results

Chart W	
Account Code	Title
730000	Budget Pool-Supplies
730100	Office Supplies
730200	Software
730300	Hardware
730500	Computer Supplies
731100	Lab Supplies-Instruction
731200	Lab Supplies-Research
731300	Animals-External Purchases
731400	Lab Animal Research-Internal Charge
731500	Lab Store Miscellaneous

Figure 4