

Using Code Lookup in SSB When Creating a Requisition

Important Notes about Budget Queries

Code lookup is the search and query functionality for Self Service. Within the Code Lookup section you can set the type of data you want to search, select to search by code or description, and establish the search criteria.

Criteria/Function	Values/Results																																																												
<p>Code Lookup Section</p>	<p>1. Scroll to the bottom of the Requisition Form to the Code Lookup section.</p> <div data-bbox="565 615 1442 1234" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> <input type="radio"/> Dollars <input checked="" type="radio"/> Percents </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">Seq#</th> <th style="width: 10%;">Chart</th> <th style="width: 10%;">Index</th> <th style="width: 10%;">Fund</th> <th style="width: 10%;">Orgn</th> <th style="width: 10%;">Account</th> <th style="width: 10%;">Program</th> <th style="width: 10%;">Activity</th> <th style="width: 10%;">Location</th> <th style="width: 10%;">Accounting</th> </tr> </thead> <tbody> <tr><td>1</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td>2</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td>3</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td>4</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr> <tr><td>5</td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr> </tbody> </table> <p>Save as Template <input type="text"/></p> <p><input type="checkbox"/> Shared</p> <p>Validate <input type="button" value="Complete"/></p> <div style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>Code Lookup</p> <p>Chart of Accounts Code <input type="text" value="N"/></p> <p>Type <input type="text" value="account"/></p> <p>Code Criteria <input type="text"/></p> <p>Title Criteria <input type="text"/></p> <p>Maximum rows to return <input type="text" value="10"/></p> <p><input type="button" value="Execute Query"/></p> </div> <p style="font-size: small; text-align: center;"> Budget Queries Encumbrance Query Requisition Purchase Order Approve Documents View Document Budget Transfer Multiple Line Budget Transfer Delete Finance Template </p> <p style="font-size: x-small; text-align: center;">RELEASE: 7.2 powered by SUNGARD SCT HIGHER EDUCATION</p> </div> <p>2. In the Type drop down field, select the type of information to search.</p> <p>3. You can search on either the Code (vendor ID) or Title Criteria (vendor name). % is a wild card for searching data. <i>Text is case sensitive.</i> For example,</p> <ul style="list-style-type: none"> %Corp% will give you everything the includes “Corp.” Corp% gives you only what begins with “Corp.” %Corp gives you only what ends with “Corp.” <p>4. Determine the Maximum rows to return (how many records to display of the search results) from the drop-down list.</p> <p>5. When all criteria have been set, click Execute Query.</p> <p>6. Query results are displayed at the top of the form in the Code Lookup results. The code will not pre-fill on the requisition. You can either enter code (i.e. Vendor ID) or copy the code from the Code Lookup results and paste into the appropriate field (i.e. Vendor ID).</p>	Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting	1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Seq#	Chart	Index	Fund	Orgn	Account	Program	Activity	Location	Accounting																																																				
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																				
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																				
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																				
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																				
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>																																																				

Requisition

i Begin by creating a requisition or retrieving an existing template. Enter Vendor ID and select Vendor Validate to default related information. Enter or modify vendor, requestor, commodity, and accounting information. Use Code Lookup to query a list of available values.

Select Document Text link to attach text to the requisition. Select Item number link to add Item Text for a commodity.

Choose Validate, if desired, to validate calculations and codes. Choose Complete to perform a validation and forward the document for processing.

i Locate the desired value from the code lookup results list and type that value into the applicable field.

Code lookup results

Vendor ID	Name
Z00010553	Apalsa-Laurinda Uarg
Z00010609	April Gu
Z00010709	Appa Publications
Z00011052	Apics Cscp Learning System
Z00011845	Apparel 2000
Z00012003	Apple Computer Inc
Z00012199	Apollo Safety Inc
Z00013499	Appa/Erappa
Z00013571	Applyyourself Inc
Z00013763	Applied Biosystems

Use Template

Retrieve

At this point you can either type in the Vendor ID in the Vendor ID field or Highlight the Vendor ID and copy (Ctrl C) then paste (Ctrl V) in the Vendor ID field.