Step by Step: Searching on Requisition Code Lookup

Definitions and Process

The **"Chart of Accounts Code"** will always default to "T".

The **"Type"** is a drop down box that lists:

account	activity	address type	buyer
chart	commodity	currency	discount
fund	index	location	organization
program	ship	tax group	unit of measure
vendor			

1. Click on vendor (or any of the types listed)

To refine your search. use "Code Criteria" or "Title Criteria".   These two criteria can be used independently of each other.

The **"Code Criteria"** (Numerical) is used when part of the number of the vendor (or account, commodity, index) is known. If only the last digits of the number are known use a % sign as a wildcard before the number. If only the first part of the number is known use the % as a wildcard after the number. If only some of the numbers are known use the % wildcard before and after the numbers. When using the % wildcard a list of everything that contains the part specified with the % wildcard will be on the list.

The **"Title Criteria"** (Alpha) is used to narrow searches in a category if part of the title of the vendor (or commodity, ship to, unit of measure) is known. Enter the first part of the title (name) followed by the % wildcard. Or enter the part that is known with the % wildcard before and after the known part. If there are no results from the search because the search data entered with the % wildcards was too far off of the actual title, the search can be narrowed more. One letter followed by the % wildcard will bring up all names starting with that letter. % wildcard followed by a letter will bring up all names ending in that letter.

The **"Maximum rows to return"** is a drop down box with predetermined numbers of results that can be selected. 10, 25, 50, 75, 100, 1000 and 10,000. Select the number of rows wanted for the results of the search. The more common the name, the higher the selection amount.

- A search can be made by using just the "Type" and the "Maximum rows to return". This will give you a list in order. If it is a vendor search the results will be in numerical order and in alpha order for the number of results specified. As new vendors are entered into the system the new vendors will not be corresponding in the same numeric sequence.

2. Click on "Execute Query" to get the list of results. **THIS WILL BRING YOU TO THE TOP OF THE PAGE.** Scroll down past the notes to see the list of results of your search. To continue searching in the same type or a new type, scroll down to the bottom of the page and search again in the "Code Lookup " area. Each

time a search is executed the results will be at the top of the page just under the notes.

- When the needed name / number is found it can be typed into the area on the form where it is required. OR to copy and paste that information – double click to highlight the item in the first column, Ctrl C to copy, scroll down to the correct box, click to get the curser in that box and Ctrl V to paste. Or copy and past in the manner you are most use to.

3. Click on Vendor Validate to see the vendor name and address.

Time Saving Tips

- Every time a Validate button is click on THIS WILL ALSO BRING YOU TO THE TOP OF THE PAGE. Scroll down to the area and validate that the information is correct.

- There are three validate areas on the form. You can validate each area, wait until the end to validate the whole form, or complete the form without validation. Early on in the learning process the vendor should be validated to check accuracy of the name and address.

- Keep a cheat sheet of the most commonly used vendors to cut down on the searching you do.

- Vendor names change on the system as companies buy other companies. And many times we must use the legal name or the Corporate name on W-9 on our system instead of the name the company does business under. Many times the old name is used by the community long after the name change. The alternate names are in the system and linked to the correct name. Many of the addresses used on purchase requisitions are the "remit to" address. Please be aware that the addresses used for PO's are the addresses the order is sent to. The addresses used under CK for check is the remit to address that the payment is sent to.

- If the address for the vendor looks incorrect, change the number in the "Address Sequence" field in ascending order until the correct address appears. If there is not another address for that vendor, THIS WILL ALSO BRING YOU TO THE TOP OF THE PAGE where an Error message appears after the notes.   If the address is not in the system and the product or service needs to be ordered from that vendor, the information must be put into the "Document Text". It will then be added into the system.

- If the vendor is not found at all during the search, THIS WILL ALSO BRING YOU TO THE TOP OF THE PAGE where an Error message appears after the notes. If this vendor is to be added into the system, the information must be put into the "Document Text".

- A Self Serve Requisition can be completed without a vendor, but the information must be provided before the requisition can be transferred to a Purchase Order.