Accounts Payable
Searching for Account Codes

Overview:

Understanding the Searching for Account Codes Process

This tutorial outlines the steps to inquire on account codes. Knowing how to navigate to Account Codes will help you perform your daily work in OMNI Financials.

Examples of tasks that require accurate account codes include:

- Entering an ePRF
- Submitting a PRF
- Reconciling weekly PCard transactions

In this tutorial, you will learn how to search for account codes by number or description. For example, if you need to find all account codes that contain the description “computer” using Chartfield Values, you will find codes for software, miscellaneous equipment, network fees and equipment.

You may also research account codes using the OMNI Query titled "FSU_DPT_CODES_ACCOUNT."

Procedure

Scenario:
In this topic, you will learn the steps to search for account codes by number or description.

Key Information:
Account Code
Account Description
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Click the <strong>Financials 9.0</strong> link.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Main Menu</strong> button.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Set Up Financials/Supply Chain</strong> menu.</td>
</tr>
<tr>
<td>4.</td>
<td>Click the <strong>Common Definitions</strong> link.</td>
</tr>
<tr>
<td>5.</td>
<td>Click the <strong>Design ChartFields</strong> link.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>Define Values</strong> link.</td>
</tr>
<tr>
<td>7.</td>
<td>Click the <strong>ChartField Values</strong> link.</td>
</tr>
</tbody>
</table>
8. Click the Account link.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.</td>
<td>Click the Account link.</td>
</tr>
</tbody>
</table>

Account

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300): 300

SetID: [ ] SHARE
Account: begins with [ ]
Description: begins with [ ]
Account Type: begins with [ ]

[Search] [Clear] [Basic Search] [Save Search Criteria]
### Step 9
**Action**
Search for the desired account.

**NOTE:** Narrow your search by inputting the first few numbers of an account code and utilizing the wildcard '%\%' for the unknown portion. You could also include a word in the **Description** field and change the drop-down "begins with" menu to "contains" to search based on a keyword.

### Step 10
**Action**
Select the desired account for review.

### Step 11
**Action**
Click the **Search** button.

### Step 12
**Action**
You have just completed a search by account code. Review details of the selected account as needed.

Click the **Return to Search** button to return to the Account Search page.

In the next few steps, you will learn how to search by description.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 13.  | Now, search by **Description** to identify the desired account.  
To do this, click the **Clear** button to remove all existing criteria from the previous search.  
|  | **Clear** |
| 14.  | Enter "**SHARE**" into the **SetID** field.  
**NOTE**: This is usually a default value required to perform a search. However, clicking clear will remove default values and values from prior searches. |
| 15.  | To look up an account by keyword, click the **Description** list.  
|  | **begins with** ▼ |
### Step 16

**Action:**

Click the “contains” list item.

**NOTE:** Your search results may not identify all uses of the keyword unless you select "contains" from the "begins with" menu.
### Step 17
Enter the desired keyword into the **Description** field.

**NOTE:** This is a description of the service or commodity type that you are trying to match to an account code. As the character length for this field is limited, it may be helpful to search using different word combinations and abbreviations if your first search does not return any results.

### Step 18
Click the **Search** button.

### Step 19
All account codes containing the word "Member" are shown below in the Search Results.
Select the desired account link.

---

### Step 20
Review details as needed, and then click the **Home** link to return to the main menu.

### Step 21
**Congratulations!**
You have completed this topic.

**End of Procedure.**