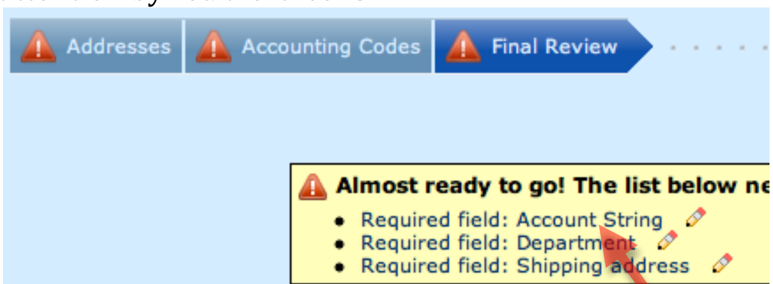
How to enter the Account String in Gateway

After you finalize your cart, you will be taken to the Requisition screen to finish up your order. Any required items that aren't yet filled in on the requisition will be brought to your attention by red alert icons.

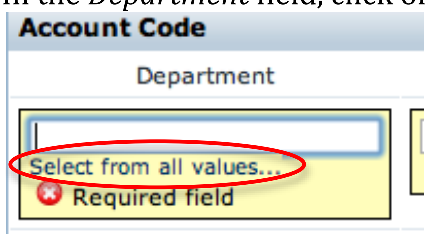


Commonly, the Account String is one of the required items you will need to enter. Following is the procedure for entering the Account String:

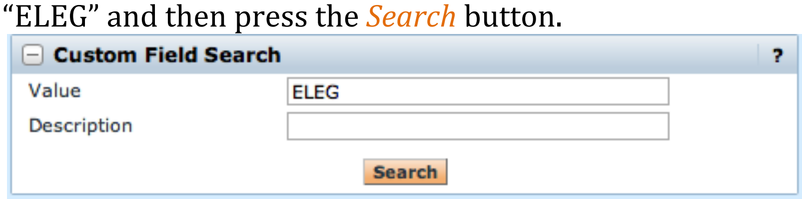
1. To edit the *Account String*, click on the "Required field: Account String" alert (this is a link, even though it may not look like one), or scroll to the *Accounting Codes* section on the requisition and press the edit button.

2. Once in the edit *Account Code* screen, you first need to select a department code to populate the *Department* field.

    a. In the *Department* field, click on the "Select from all values..." link.

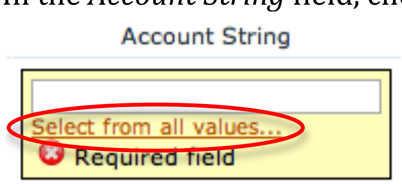
    b. A generic *Custom Field Search* window should pop up. In the *Value* field type "ELEG" and then press the *Search* button.

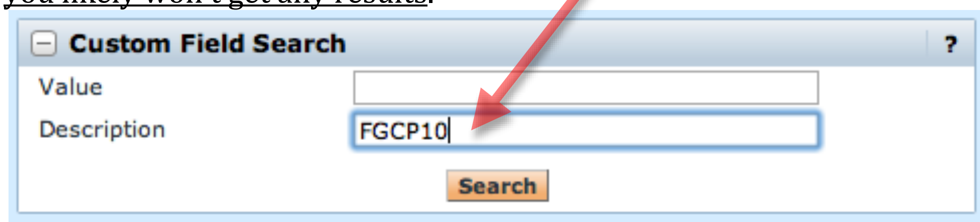
    c. In the search results, press the *Select* button.

3. Next, you need to choose an *Account String* (note: you will not be able to choose an *Account String* until you choose a department code in the *Department* field – step 2 above).

    a. In the *Account String* field, click on the "Select from all values..." link.

b. Once again, a generic *Custom Field Search* window should pop up. This time, instead of typing in the *Value* field, you will search for the account string by typing a key word in the *Description* field. For example, if you know your account's project code (i.e., FGCP10), you would enter "FGCP10" in the Description field to search for the account string associated with that project code. Similarly, if you know the account's fund number (i.e., 24987), you would enter "24987" in the Description field. Other keywords, including PI name, project title, and agency are also searchable in the Description field. <u>Note: Be sure to do this search in the *Description* field, not the Value field, or you likely won't get any results</u>.



c. From the search results, select the account string you want to use for this order.

4. Now that you have selected the *Department* and *Account String*, press the Save button in the *Account Code* window (you do not need to provide values for any of the other fields in the *Account Code* window).

To add Account Strings to your profile for quick retrieval for future order, see the procedure called "How to Create Account Code Favorites."