


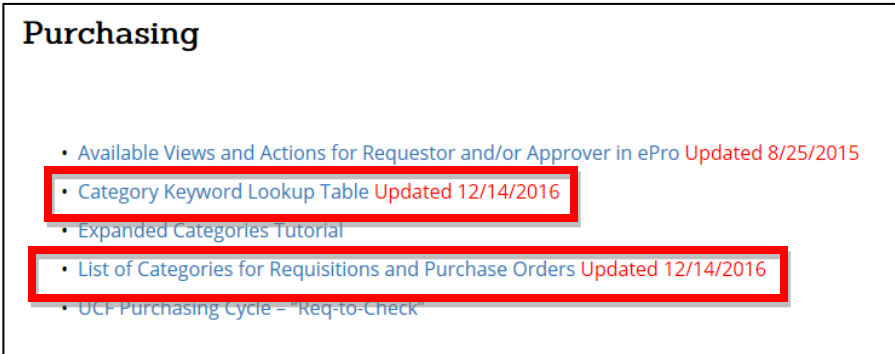


# ADDY NOTES



## Choosing a Purchase Category in UCF Financials

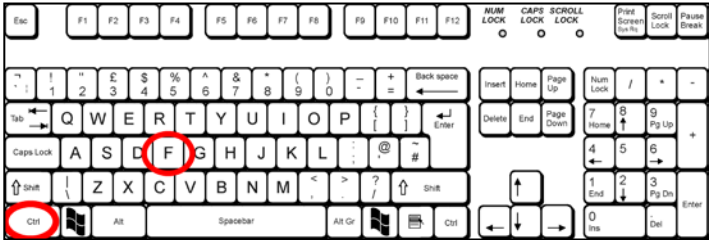
This Addy Note is helpful if you're experiencing difficulty deciding the most appropriate category to use for a requisition, or are having trouble finding a category for the item you're ordering. The Note will tell you about two resources, the **List of Categories for Requisitions and Purchase Orders** and the **Category Keyword Lookup Table**, that will make it easy to find and select a suitable category code or subject. This example uses the **Category Keyword Lookup Table**, but searching for a category code works the same.

Step	Action
1.	Enter the UCF Financials website: <a href="https://financials.ucf.edu/helpful-resources-about/">https://financials.ucf.edu/helpful-resources-about/</a>  
2.	Scroll down to the <b>Purchasing</b> section and you'll find the <b>List of Categories for Requisitions and Purchase Orders</b> and the <b>Category Keyword Lookup Table</b> links.  



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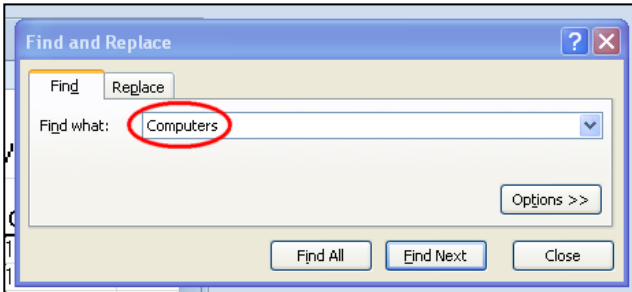
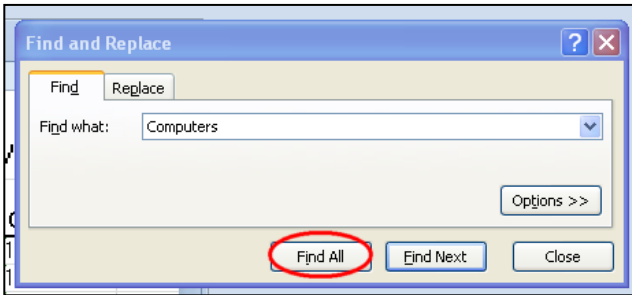
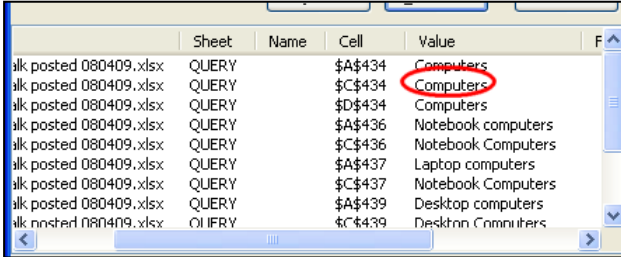


Step	Action
3.	<p>The contents of both Excel spreadsheets are very similar:</p> <ul style="list-style-type: none"> <li>• If you know the category’s subject – for example you’re looking for “Computers” – but don’t know the category number, you’ll want to use the <b>Category Keyword Lookup Table</b>.</li> <li>• If you know the category code – for example you have code “10100000” – but don’t know the category’s subject, you’ll want to use <b>List of Categories for Requisitions and Purchase Orders</b>.</li> </ul>
4.	<p>Click the appropriate link to download an Excel spreadsheet to your computer.</p> <div data-bbox="365 957 1255 1308" style="border: 1px solid black; padding: 10px;"> <p><b>Purchasing</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Available Views and Actions for Requestor and/or Approver in ePro Updated 8/25/2015</a></li> <li>• <a href="#">Category Keyword Lookup Table Updated 12/14/2016</a></li> <li>• <a href="#">Expanded Categories Tutorial</a></li> <li>• <a href="#">List of Categories for Requisitions and Purchase Orders Updated 12/14/2016</a></li> <li>• <a href="#">UCF Purchasing Cycle - "Req-to-Check"</a></li> </ul> </div>
5.	<p>The simplest way to locate something in an Excel spreadsheet is to use the “Find” feature. Simply click the <b>Control (Ctrl)</b> key and the “<b>F</b>” key on your keyboard simultaneously to open the “Find” feature.</p> 



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Step	Action
6.	<p>Enter either the category code or an appropriate subject in the <b>Find and Replace</b> box that you want to locate.</p> 
7.	<p>Click <b>Find All</b>.</p> 
8.	<p>Click the subject or category code of interest.</p> 
9.	<p>The Excel spreadsheet displays the category code (or subject).</p> 