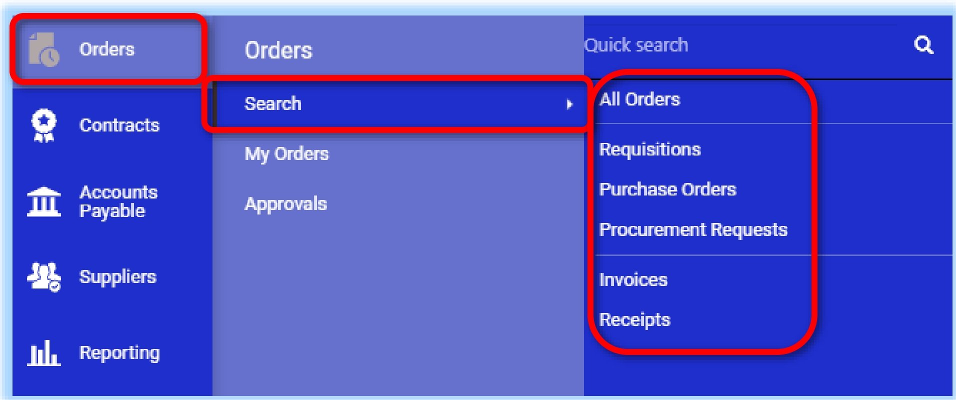
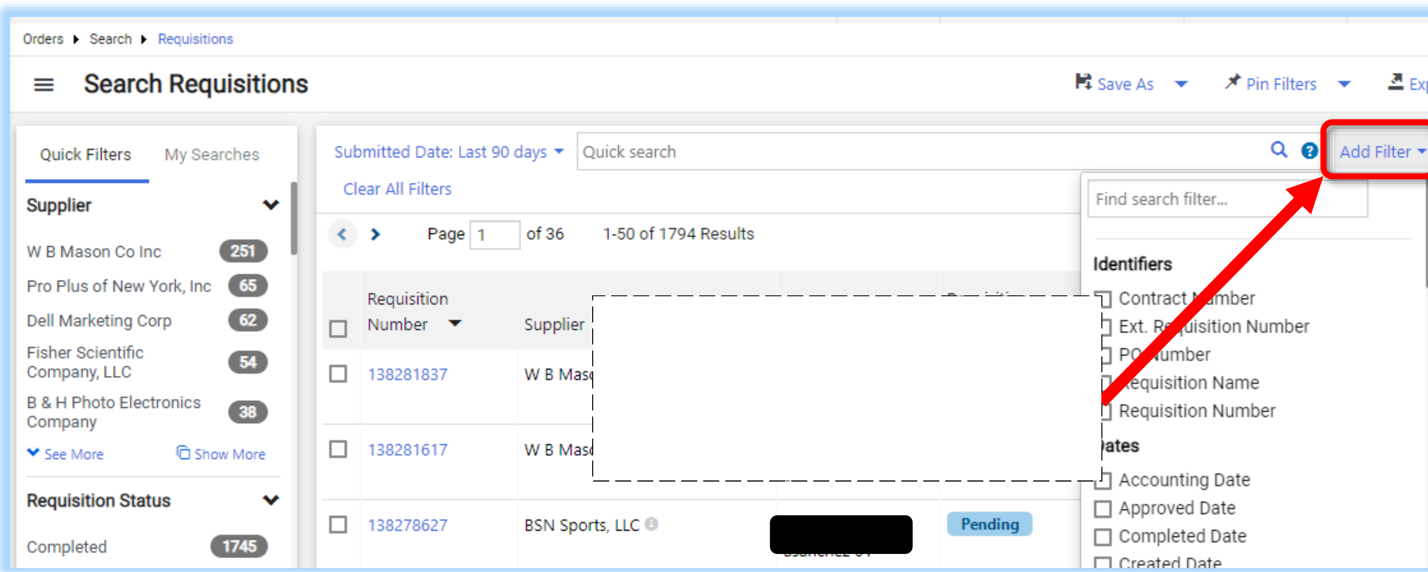
E-Procurement's Updated Search Interface

Upon logging into E-Procurement you may be prompted to take a tour of these new features. It is highly recommended to take this tour.

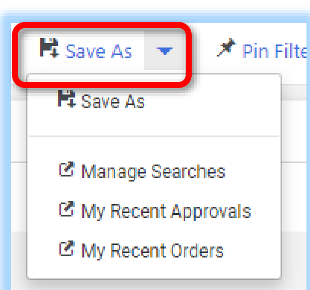
"Documents" is Now "Orders":

To search, select the "**Orders**" icon and highlight "**Search**." Select "**All Orders**," "**Requisitions**," "**Purchase Orders**," "**Procurement Requests**" (**aka Form Requests**), **"Invoices"** or **"Receipts"** from the menu.



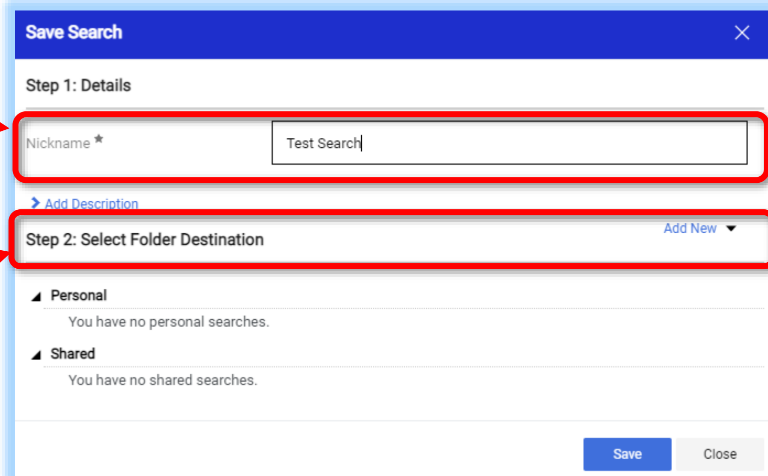


Saving a Search:



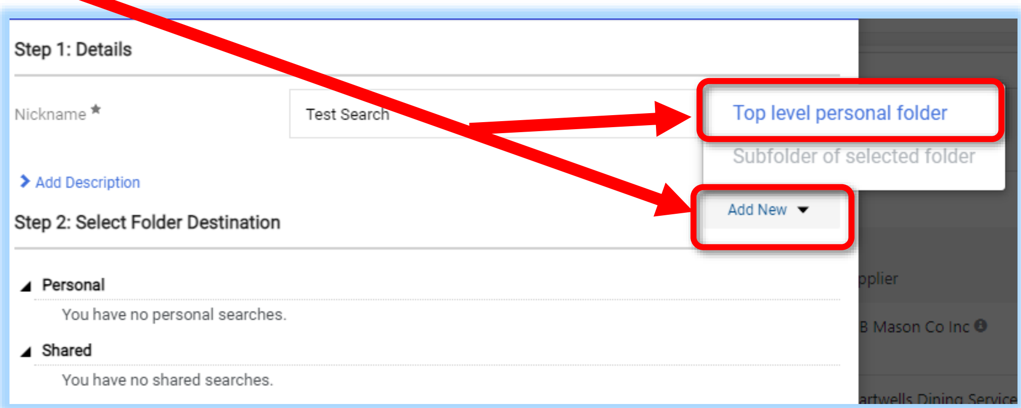
Click on the **"Save As"** button to save searches for future access in the **"My Searches"** panel on the left-hand side.

Enter a “**Nickname”** to identify your search for future reference.

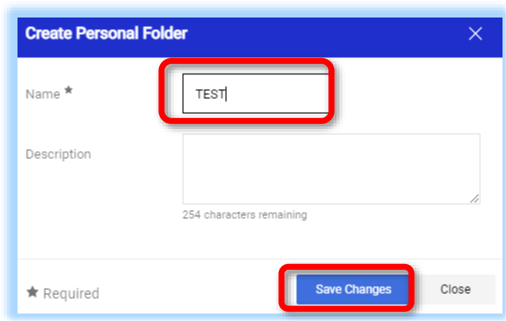


Select the **“Folder”** you would like to save this search in. If saved in “**Personal,”** only you can view this search. If saved in “**Shared**,” other users can view this search.

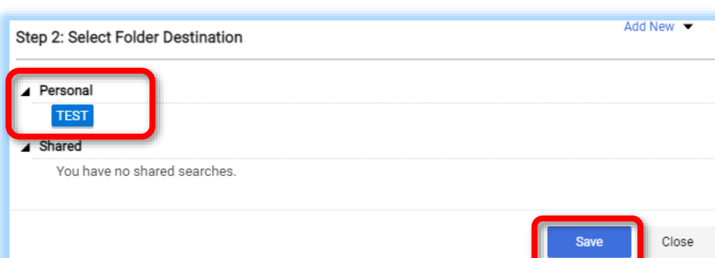
If there are no folders to select, click “**Add New**” and select “**Top level personal folder**” to create a new folder.



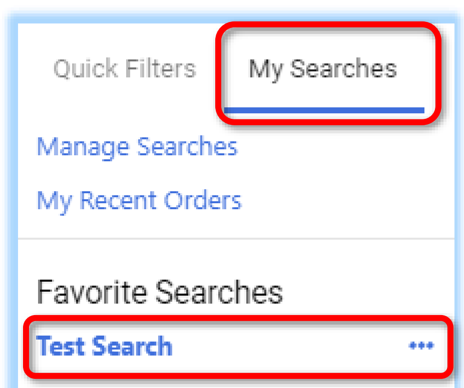
Enter the **“Name”** of the folder (description is optional) and click **“Save.”**



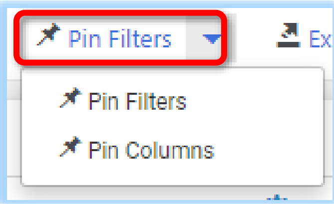
Select your newly created **“Folder”** and click on “**Save”** to finish saving the search.



To access your newly saved search, click on the **“My Searches”** tab located in the left-hand side panel:



Pinning Filters:

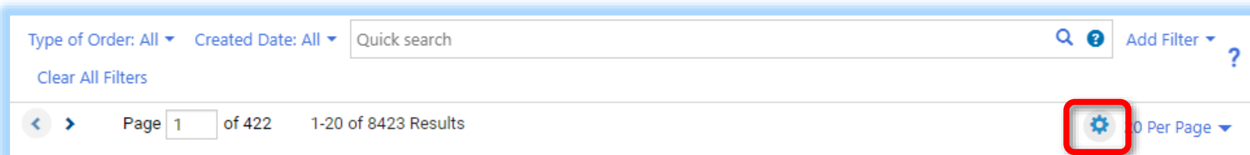


Click on the **"Pin Filters"** option to set your filters as the default search view every time you access the search page.

To clear filters, click on **"Clear All Filters"** either next to or below the search bar depending on how many filters were added.

Adding Additional Columns:

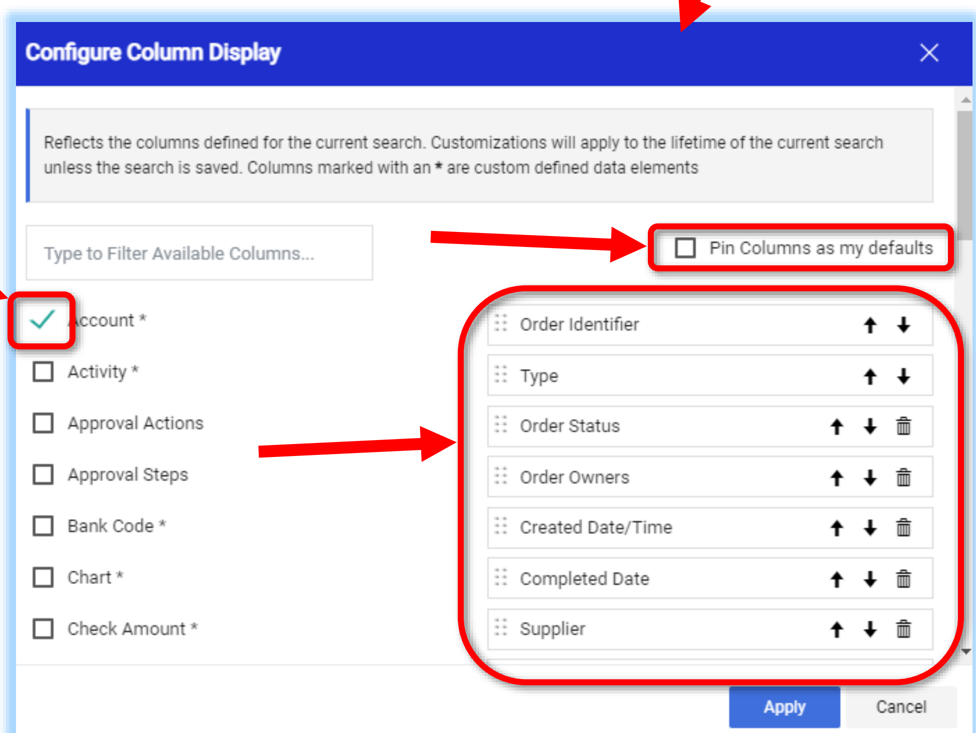
To add additional columns to the view, click on the Settings icon



In the pop-up box, check off the columns you would like added to your view.

Drag and drop the columns in the list to the right in the order you would like to view them.

Click on **"Pin Columns as my defaults"** to set this view as your default.

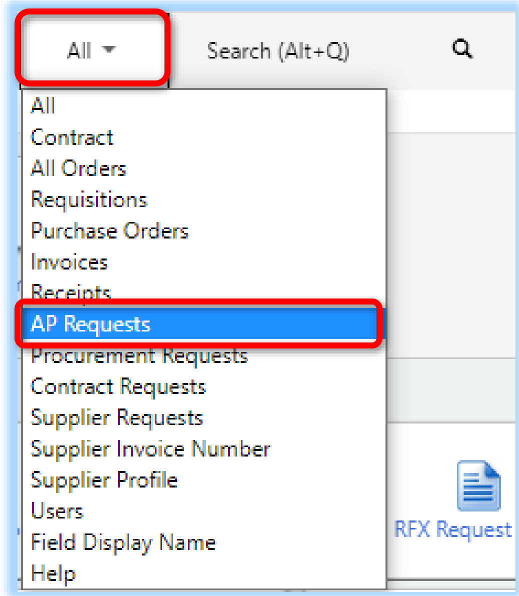


To search for check requests please review next section.

Searching Via Upper Right Toolbar to Search Across System:

If you have your document number and would like to search across the entire system you can use the search box in the upper right hand corner.

To conduct a more targeted search click into the upper right search field (next to your shopping cart) to unveil the dropdown menu containing additional search options. Select the document you are searching for and enter the document number. All documents are categorized by their respective module (**<u>ie. Check Requests are now under "AP Requests"</u>**).

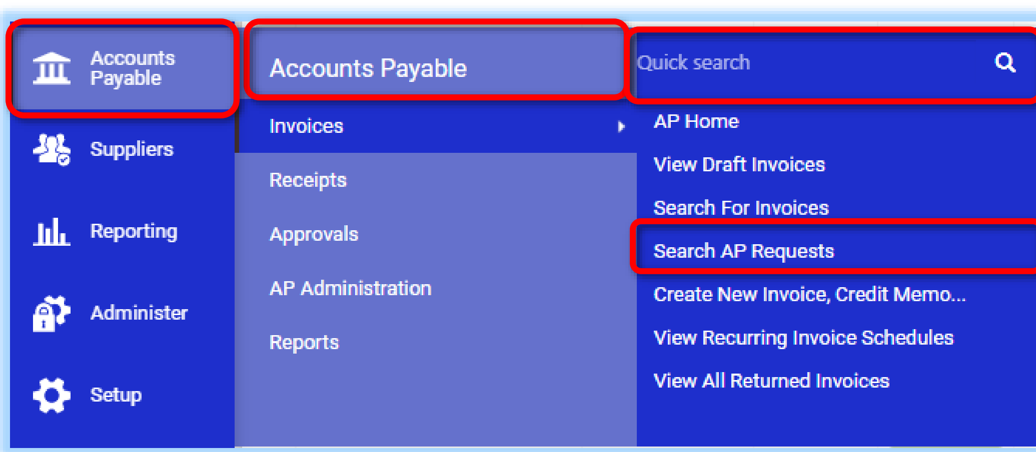


<u>PLEASE NOTE:</u> "Form Requests" have been removed as an available search filter. If searching for a Check Request you must select "**AP Requests**" to search.

Searching Via Each Module Menu:

In addition to "**Orders**" each module has their own search bar and search options.

"**Check Requests**" are now rebranded as "**AP Requests.**" To search for a Check Request you can click on the "**Accounts Payable**" icon to search for your Check Request document number via the **"Quick Search"** toolbar or click on "**Invoices**" and select "**Search AP Requests**."



To sort by Submitted Date click on the "**Submitted Date**" column title until your results are sorted by the desired order.