

Search All Documents

Advanced Document Search OR

Document Types to Include: Select All Payments Select All Encumbrances Select All Clear All

Purchase Order Travel Request Auth For Payment Petty Cash
 PO Change Travel Completion Personal Auto Mileage Reimbursement for Cash (discontinued)
 PO Payment Non-Employee Expense Multi Intra State Travel (discontinued)

Main Sort: Appr Dt ▼
 Second Sort: Vendor Name ▼
 Third Sort: PO Number ▲ ▼
 Results per page: 20 ▼

PO Number	P Req No	Doc No	Type	Proj #	Vendor Name	Amount	Status	Check Dt	Check No	Appr Dt	FA Staff	PDF
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Figure 1 - Advanced Search listing screen

The Search All Documents feature provides the ability to search all Purchasing, Payment, and Travel documents in one place. It also provides the ability to search (by words, numbers, etc.) within certain fields in the documents.

Location

The Search All Documents feature can be found in the Miscellaneous section of the Main Menu and the drop down list.

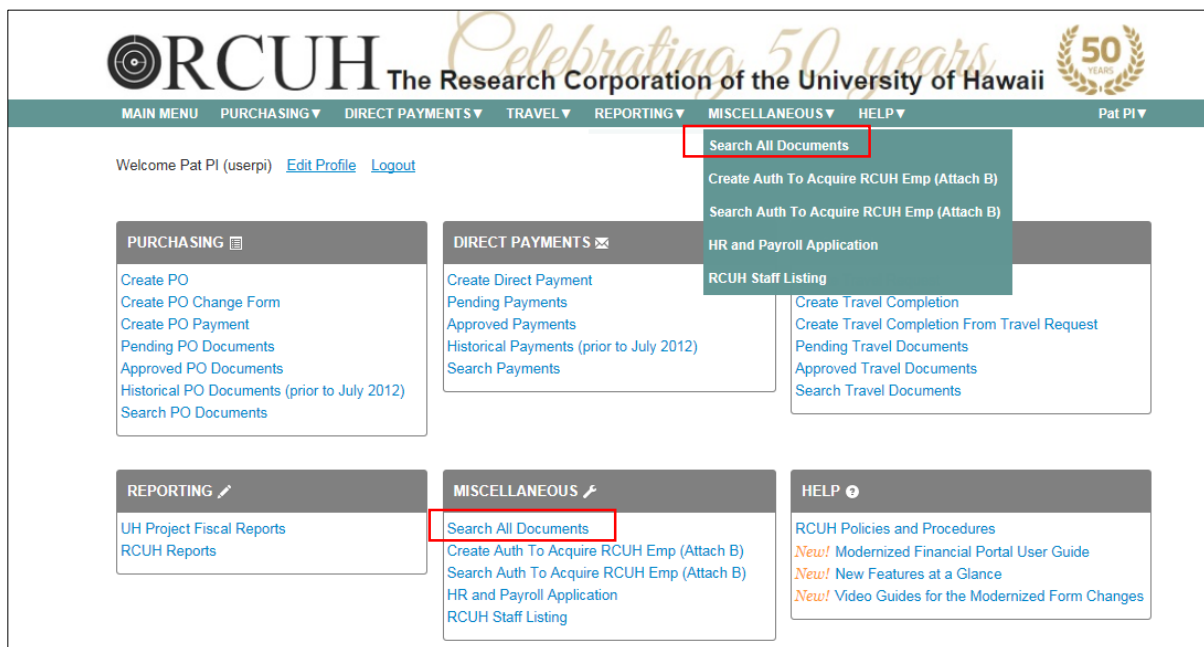


Figure 2 - Where to find Search All Documents

Document Types

This search combines the following document types into one results screen

- Purchase Order
- PO Change
- PO Payment
- Travel Request
- Travel Completion
- Authorization for Payment
- Non-Employee Expense
- Personal Auto Mileage
- Petty Cash

- Reimbursement for Cash
- Multi Intra State Travel

Keyword Search

Two keyword search criteria may be entered using the two text fields. These keywords can be qualified by the dropdown as either AND or OR. The OR function will find documents that have *either* keyword 1 or keyword 2 and return those results. The AND function will find documents that have *both* keyword 1 and keyword 2 in the same document and will return those results.

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Figure 3 - Multiple Criteria Search

For example, entering the criteria “Office”, “Japan” and selecting “OR” will return results that have Japan OR Office in any of the fields for the selected document types.

Advanced Document Search: office OR japan

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Figure 4 - OR Search Example

On the other hand, entering the criteria “Office”, “Japan” and selecting “AND” will return results that have Japan AND Office in any of the fields for the selected document types.

Advanced Document Search: office AND japan

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Figure 5 - AND Search Example

Selection Options

Each document type can be selected in combination or individually by checking the document types. Included on the search screen are options to quickly select specific types of documents. The option to “Select All” will automatically check all document types. The “Clear Selected” option will clear all selected boxes. “Select All Payments” will check all payment documents. “Select All Encumbrances” will check all encumbrance documents.

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Figure 6 - Select All Option

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Figure 7 - Select All Payments Option

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Figure 8 - Select All Encumbrances Option

Sort Options

Results will initially be sorted by the document approved date. Additional sorting can be done on three columns. The sorting options can be selected from the drop down lists on the right. Each selection has an ascending (↑) and descending (↓) option. These options need to be selected before clicking the search button or the columns will be sorted according to the defaulted options.

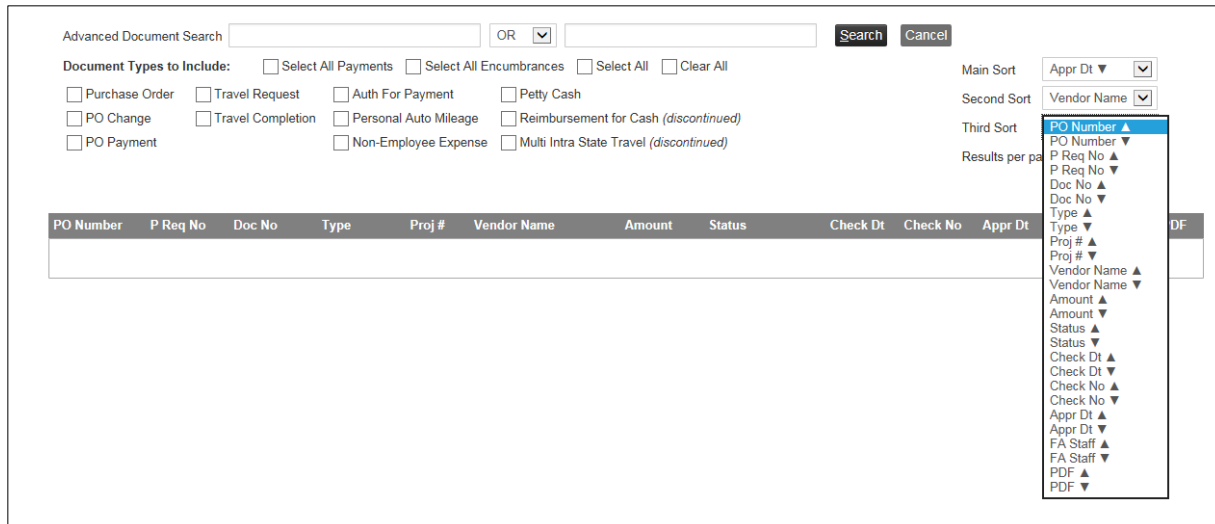


Figure 9 - Sorting Options

Search Fields

The search criteria entered in the text box will search on the following fields within the documents:

- PO Number
- Payment Request Number
- Document Number
- Project Number
- Vendor Name, Code, Address
- Amounts – PO total, PO Change amount, PO Payment total, Project(s) to be charged Grand Total
- Status
- Check Date, Number
- Object Code/Budget Category
- Date(s) – Approved, Created
- FA Staff
- Initiator
- PI Name/Authorized by
- Descriptions (all documents)Equipment Inventory
- Purpose/Justification for Travel (Travel Forms)
- Special Instructions (Travel Forms)
- Trip Itinerary – Destination (Travel Forms)
- Reasons for Payment (AFP)
- Business Purpose Details (Non-Employee Expense Payment Form)
- From/To/Purpose (Personal Auto Mileage Voucher)
- Remittance Information – Invoice/Reference Number
- Internal Comments

Hints and Tips

Keywords entered will find any instance of the characters within the search fields, meaning “disco” will return “disco” as well as “discount”. Keywords are not case sensitive.

Date fields searched on include: Approved Date and Creation Date. To search on these dates, the search criteria entered must be in format “month/day/year”. For example 10/4/15.