

Search All Documents

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 or numbers within certain fields in the documents.

New Features

The screenshot shows the search interface with the following callouts:

- 1: Search for ALL of the following words
- 2: Search input fields (1-4)
- 3: Use Exact Word Match checkbox
- 4: Go to Page input field
- 5: Download Results as CSV link
- 6: Hide More Search Options button
- 7: Approved/Modified Any Date Range filter
- 8: Any Amount filter
- 9: Workflow View dropdown menu

1. Search for ANY or ALL of the following words

The ANY function will find documents that have any of the search criteria in the same document. For example, entering the criteria “Japan” and “Office” and selecting “ANY” will return documents that have either Japan OR Office in any of the fields.

The ALL function will find documents that have all of the search criteria in the same document. For example, entering the criteria “Japan” and “Office” and selecting “ALL” will return documents that have Japan AND Office in any of the fields for the same document.

2. Multi search criteria

The number of words that can be searched for at one time has increased from 2 to 4 words.

3. Exact word matches

The ability to search for an exact word within search fields. For example, using the default search and entering the criteria “art” without using Exact Word Match may return documents with words that contain the word “art” (for example, chart, depart, participate, etc.). However, entering the criteria “art” with Exact Word Match will return only documents with the specific word “art” (for example, art supplies).

4. Page jump controls

The ability to jump directly to a desired search result page. Enter the desired page and click on the Search button.

5. Download results as a csv file

The ability to download all of the search results as a csv file.

6. Basic and Advanced search tools

The search tools have been split into Basic and Advanced features. Click on [View More Search Options](#) to access the advanced search features.

Basic features

- Search criteria
- Document Types
- Exact word match
- Page jump controls
- Download search results

Advanced features

- Search by date
- Search by amount or amount range
- Sort options
- Workflow view

7. Search by date

The ability to search by dates within preset or custom ranges.

Custom Date Range ▼

Any Date Range
 Within a Week
 Within a Month
 Within a Year
 Use this Custom Range:
 to

8. Search by amount

The ability to search by amounts within preset or custom ranges.

Any Amount ▼

Any Amount
 Under \$1000
 Under \$25,000
 Over \$25,000
 Use this Custom Range:
 to

The searched amount will vary by document type:

- Purchase Order = PO Total
- PO Change = Change Amount
- PO Payment = Payment Summary Total
- Authorization for Payment = Grand Total
- Non-Employee Expense = Grand Total
- Petty Cash = Grand Total
- Personal Auto Mileage Voucher = Grand Total
- Travel Request = Travel Advance Total
- Travel Completion = Claim Due

9. Workflow view

The ability to filter search results by the following statuses:

- All Documents
- Pending Documents
- Approved Documents

Searchable Fields

Current Searchable Fields

- PO Number
- Payment Request Number
- Document Number
- Check Number
- Project Number
- Object Code/Budget Category
- Vendor Name
- Vendor Code

- Vendor Address
- Initiator
- FA Staff
- PI Name/Authorized by
- Description
- UH Subaward (Purchase Order)
- Purpose/Justification for Travel (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
- Equipment Inventory
 - Description
 - Brand Name & Model Number
 - Serial Number
 - Building Name & Room No.
 - Equipment Component
 - Fabricated Equipment
- File Attachments – Description
- Audit Information – User name

New searchable fields

- Remittance Information - Customer Account/Comment
- Payment Type
- Quotation Number (PO and PO Payments)
- Internal Special Instructions - Other Information (Purchase Order)
- External Special Instruction (Purchase Order)

Frequently Asked Questions

1. **Q:** What is the difference between Search Documents (Search PO, Search Payment, and Search Travel) and Search All Documents? I did a search in Search Payments and Search All Documents and my results were different.
A: The Search PO Documents, Search Payments, and Search Travel Documents will only perform a basic search on the fields in the listing screens (PO #, Payment Request #, Document #, Project #, Vendor Name, Check #, etc.). The Search All Documents will search on the fields in the listing screens, in addition to searching within specified fields in the documents (Descriptions, Reasons for Payment, Internal Comments, etc.). For example, searching for “Dell” in Search Payments will produce a list of payments to vendor names that contain Dell, such as Dell, Inc. and Dell Marketing. However, searching for “Dell” in Search All Documents will produce a list that may include payments to Bankcard Center for a Dell computer.
2. **Q:** Are we able to use wildcard (*) search functions?
A: No. However, the default search already performs a wildcard search similar to using * in that it matches characters in a word. For example, entering the criteria “UH” may return documents with words that contain “UH” (for example, UH Bookstore, RCUH, etc.).
3. **Q:** Will the search criteria keywords be highlighted in the document?
A: No. We suggest using the Find function in your web browser.