



NAVIGATING AND MANAGING ADVANCED SEARCH QUICK REFERENCE GUIDE BUD-15

BUD

The purpose of this Quick Reference Guide (QRG) is to provide North Carolina Financial System (NCFS) users step-by-step and conceptual information on advanced search functionality such as Query by Example (QBE), conditional operators, and wildcards.

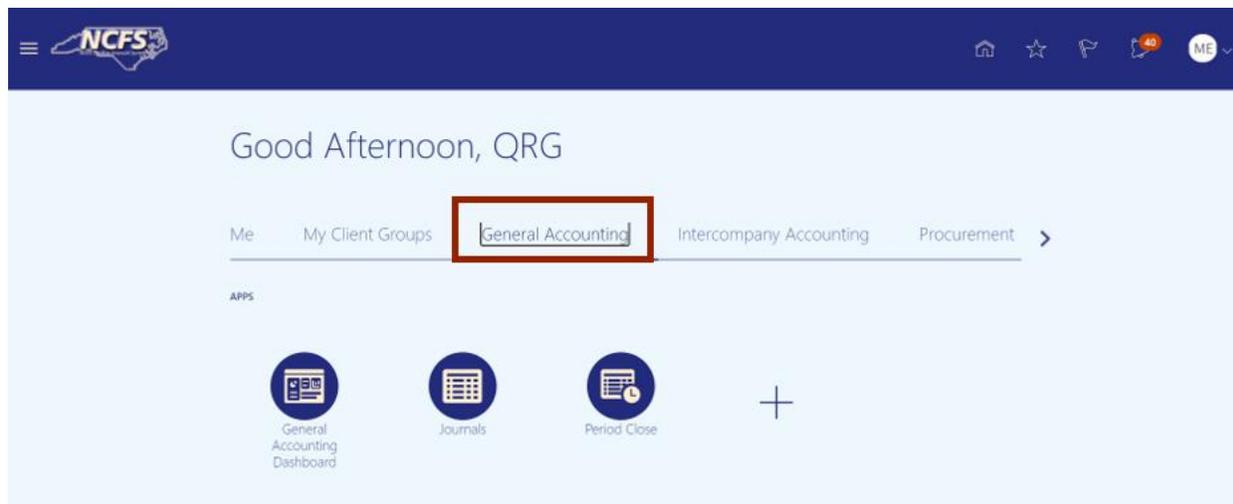
Overview

NCFS allows users to have additional options when trying to complete a search. The Advanced Search also contains conditional operators. The conditional operators are “Starts with,” “Ends with,” “Equals,” “Does not equal,” “Contains,” and “Does not contain.” “Starts with,” “Ends with,” and “Contains” should be used when some information is known but the complete data is unknown. If the exact information is known, then use “Equals” for a faster response. The only time to use a “Does not Equal” and “Does not Contain” operator is as part of a multiple field search. Adding fields allows users to search for data that is not included in the Advanced or Basic Search functionality. Adding fields allows users to search with advanced fields with any given data. The Query by Example feature allows users to filter rows that are displayed for a specific column. Users can enter text to filter on, if available, for a specific column.

Navigating and Managing Advanced Search

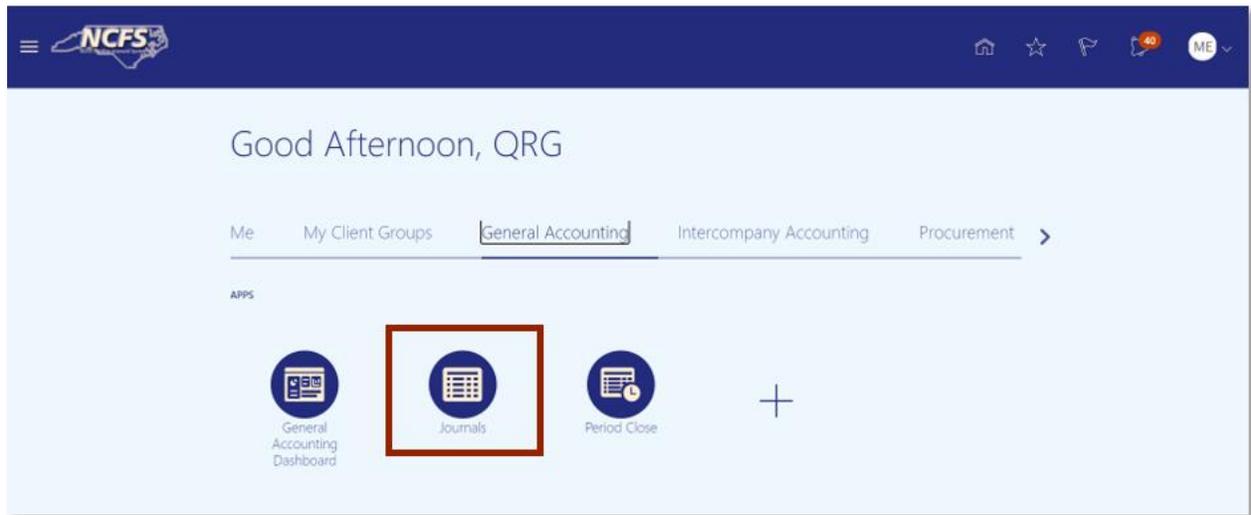
To conduct an Advanced Search in NCFS, please follow the steps below. **Note: In order to make this guide relevant to all users, this functionality is demonstrated via the General Accounting Module.*

1. Access the NCFS Homepage and click the **General Accounting** icon.



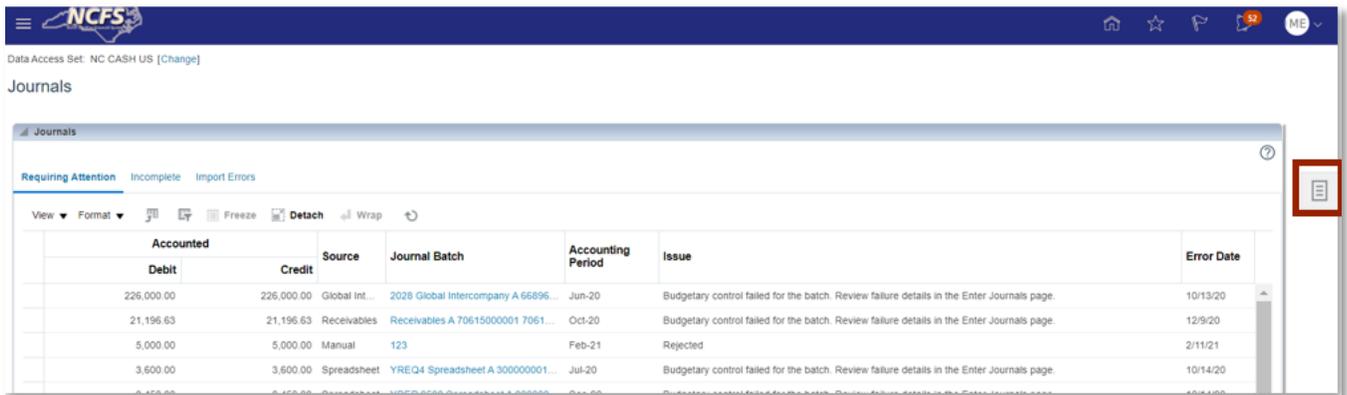
The General Accounting icon on the NCFS Homepage

2. Click **Journals**.



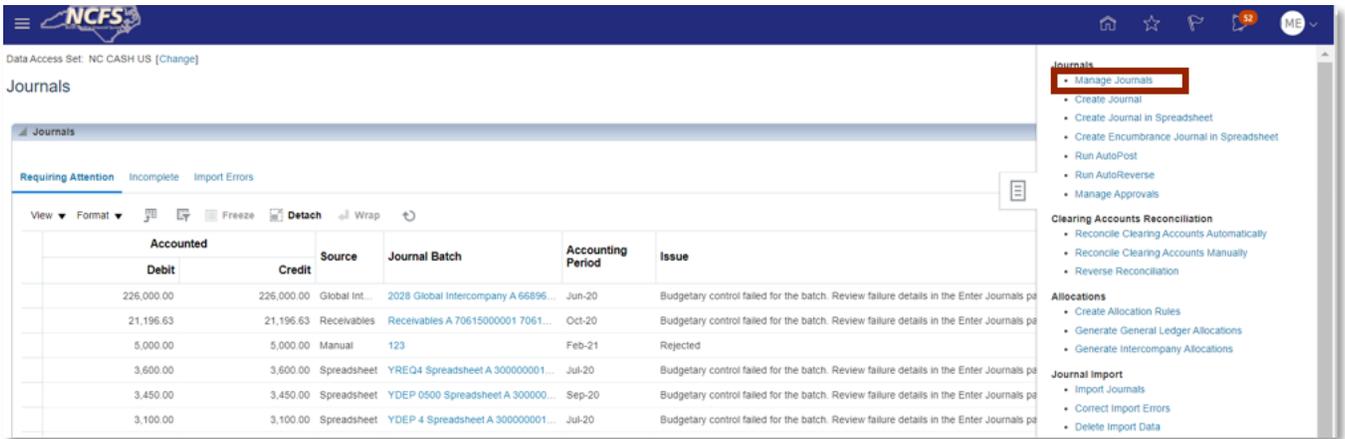
The Journals app on the NCFS Homepage

3. Click the **Tasks** icon to open the task list.



The Task list on the Journals screen

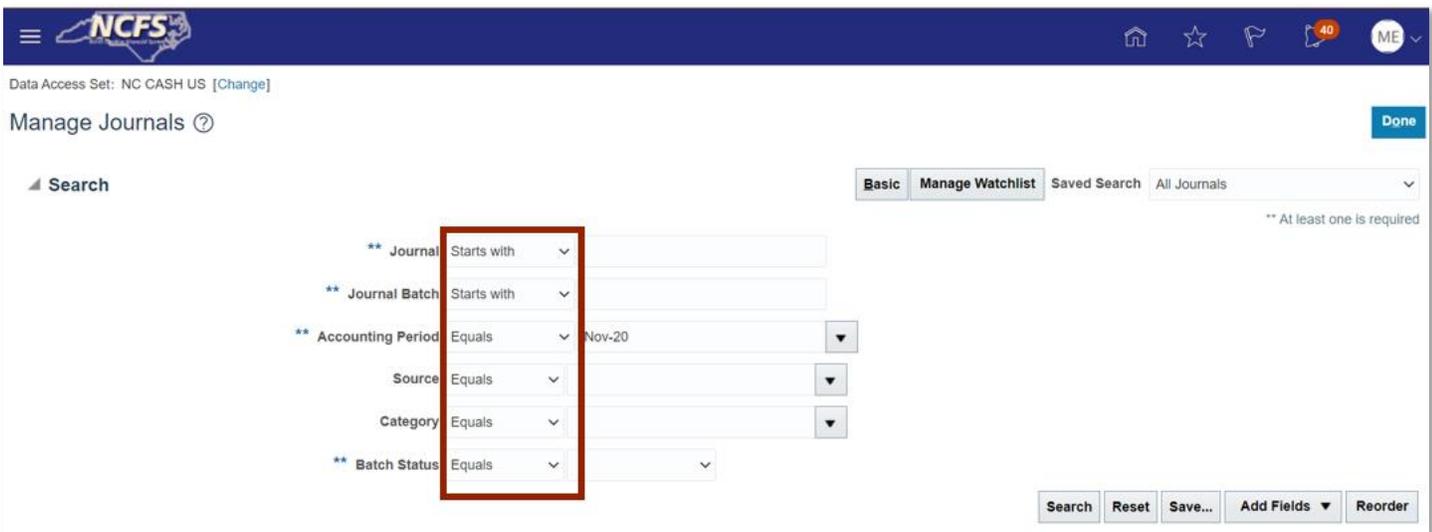
4. From the task list, click **Manage Journals**.



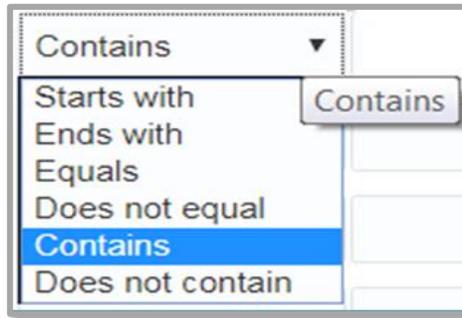
The Manage Journals options in the task list

5. The screen displayed below is the *Advanced Search* screen. To adjust the conditional operator, click the *dropdown* arrow in the box to the right of the field name. Once the **Contains** box is selected a *conditional operators* dropdown appears. The dropdown has the following options:

1. Starts with
2. Ends with
3. Equals
4. Contains
5. Does not contain



Conditional Operators

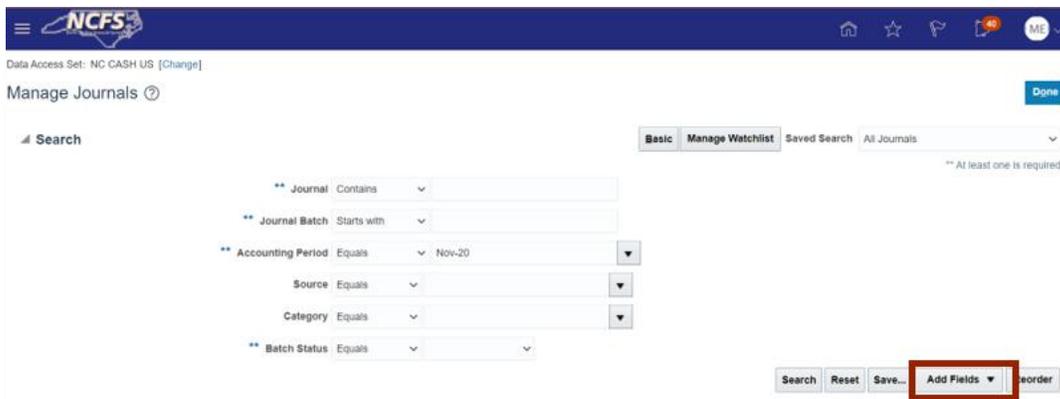


Conditional Operator Options

Adding Fields

Adding fields allows users to search for data that is not included in the Advanced or Basic Search functionality. Adding fields allows users to search with advanced fields with any given data.

1. Click the *Add Fields* dropdown arrow.



Add Fields Drop Down



User Tip: Users can add a field multiple times, such as Accounting Period. This will allow for searching for multiple periods at one time.

2. A dropdown arrow appears with various options. Users should select the desired option.

Journal	Journal Batch	Accounting Period	Source	Category	Journal Entered Debit	Journal Entered Credit
▶ 0500 DEP 12/22/20 Confer...	0500 DEP 12/22/20 Confer...	Nov-20	Manual	DEP - ACH	1,111.00 USD	1,111.00 USD
▶ 0600 PAY 11/22/20 General...	0600 PAY 11/22/20 General...	Nov-20	Manual	PAY-6-GENERA...	1,500.00 USD	1,500.00 USD
▶ 0600 PAY 11/22/20 General...	Pay Test - Absolute	Nov-20	AutoCopy	PAY-6-GENERA...	220.00 USD	220.00 USD
▶ 1 Global Intercompany	2189 Global Intercompany ...	Nov-20	AutoCopy	Global Intercom...	200.00 USD	200.00 USD
▶ 1 Global Intercompany	2205 Global Intercompany ...	Nov-20	AutoCopy	Global Intercom...	80.00 USD	80.00 USD
▶ AW TEST	AW TEST	Nov-20	Manual	DEP - CASH & ...	10.20 USD	10.20 USD
▶ AW-GB-TEST01	AW-GB-TEST01	Nov-20	Manual	DEP - CASH & ...	123.45 USD	123.45 USD
▶ AW-TEST-J01	AW-TEST-BATCH	Nov-20	Manual	DEP - CASH & ...	10.00 USD	10.00 USD

The dropdown menu 'Additional Field Options' includes the following items: Accounting Date, Accounting Period, Accounting Sequence Name, Accounting Sequence Number, Approval Date, Approval Status, Balance Type, Batch Description, Batch Status, Category, Completion Status, Created By, Creation Date, Currency, and DetailStatus.

Additional Field Options

Query-by-Example

To conduct a Query-by-Example search in NCFs, please follow the steps below. **Note: In order to make this guide relevant to all users, this functionality is demonstrated via the General Accounting Module.*

1. Enter desired search criteria then click [SEARCH].

The screenshot shows the 'Manage Journals' search interface in NCFs. It includes a search criteria section with the following fields:

- ** Journal: Contains (dropdown)
- ** Journal Batch: Starts with (dropdown)
- ** Accounting Period: Equals (dropdown) with 'Mar 21' selected
- Source: Equals (dropdown)
- Category: Equals (dropdown)
- ** Batch Status: Equals (dropdown)

At the bottom right, there are buttons for 'Search', 'Reset', 'Save...', 'Add Fields', and 'Reorder'. The 'Search' button is highlighted with a red box.

Advanced Search



2. Click **Query-by-Example** to narrow the necessary search options.

Journal	Journal Batch	Accounting Period	Source	Category	Journal Entered Debit	Journal Entered Credit	Batch Status
▶ Mar-21 Payments	Payables A 117487000001 ...	Mar-21	Payables	Payments	1,000.00 USD	1,000.00 USD	Posted
▶ Mar-21 Payments	Payables A 117493000001 ...	Mar-21	Payables	Payments	50.00 USD	50.00 USD	Posted
▶ Mar-21 Purchase Invoices	Payables A 109642000001 ...	Mar-21	Payables	Purchase Invoices	0.15 USD	0.15 USD	Posted
▶ Mar-21 Purchase Invoices	Payables A 109642000001 ...	Mar-21	Payables	Purchase Invoices	15.00 USD	15.00 USD	Posted
▶ Mar-21 Purchase Invoices	Payables A 116254000001 ...	Mar-21	Payables	Purchase Invoices	1,250.00 USD	1,250.00 USD	Posted
▶ Mar-21 Purchase Invoices	Payables A 117493000001 ...	Mar-21	Payables	Purchase Invoices	1,290.00 USD	1,290.00 USD	Posted

Query-by-Example Option

3. The Search fields appear. Enter the desired search criteria then click [Enter] on the keyboard.

Journal	Journal Batch	Accounting Period	Source	Category	Journal Entered Debit	Journal Entered Credit	Batch Status
▶ Mar-21 Payments	Payables A 117487000001 ...	Mar-21	Payables	Payments	1,000.00 USD	1,000.00 USD	Posted
▶ Mar-21 Payments	Payables A 117493000001 ...	Mar-21	Payables	Payments	50.00 USD	50.00 USD	Posted

Query-by-Example Fields

Wildcards

Users can use wildcard characters to complete keywords used in search criteria to pull the desired data.

NCFS
Data Access Set: NC CASH US [Change]
Manage Journals ?

Search

Basic Manage Watchlist Saved S

** Journal Contains []

**** Journal Batch Contains [%Pay]**

** Accounting Period Equals [Mar-21]

Source Equals []

Category Equals []

** Batch Status Equals []

Search

Wildcard Search



Pattern	Means	Example
%abc	Begins with anything (or nothing), ends in <u>abc</u>	abc, redabc, Altoonaabc, Game of abc, 99abc
Abc%	Begins with Abc, followed by anything (or nothing) (Often implied/not needed)	Abcapple, Abc Corp., Abc71a, Abc
%abc%	Contains abc somewhere in the data – or all by itself	Largeabc738, Babc, abcash, abc

Wrap Up

The NCFS Search capabilities are designed to make it easier to sort through large amounts of data. These capabilities assist users in retrieving and analyzing large sources of data for their business process needs.

Additional Resources

For more information on Searching Capabilities, please review the following materials:

Web Based Training (WBT)

- None

Instructor Led Training (ILT)

- NAV 100: Advanced Navigation and Inquiry

Quick Reference Guides (QRGs)

- None