

System Searches Process Guide

The system search functionality gives users the ability to search NC E-Procurement to locate and view eRequisitions, purchase orders, receipt information (NCAS only), user profile changes, and catalog items. The system search functionality is a quick and easy way to locate needed information. System searching offers a range of search criteria so users can conduct a search with minimal information. For example, users can search by requester, commodity code, creation date, and/or supplier name.

For similar or frequent searches, use the Saved System Search functionality. This allows users to directly access a previous system search quickly without entering specific search criteria again.

1. Select the type of search you would like to conduct via the **'Search'** Shortcut Menu on the Menu Bar or via the **'Search'** Portlet.



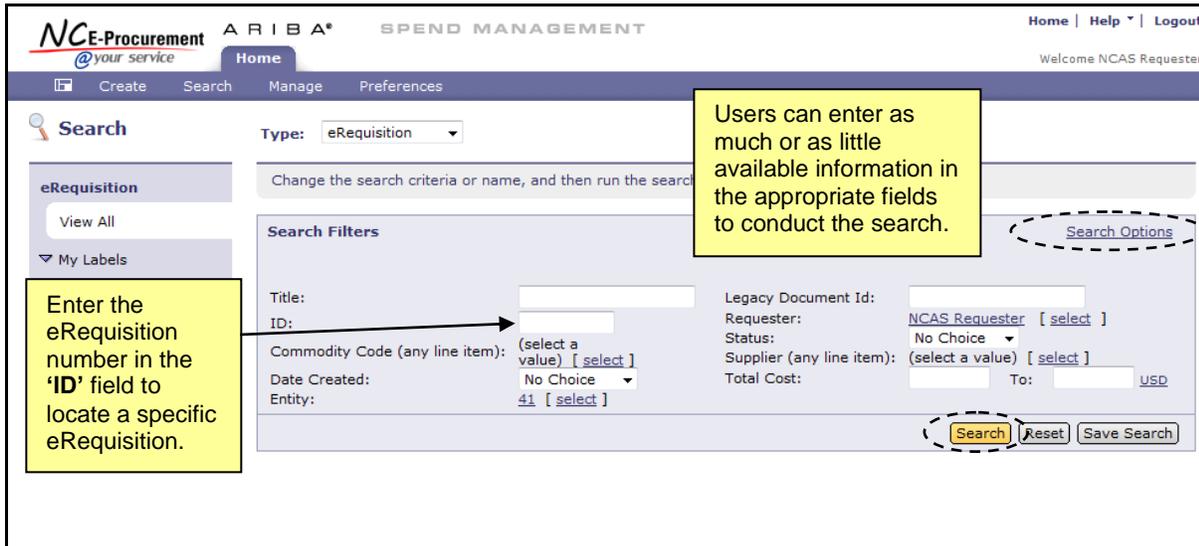
The screenshot shows the NCE-Procurement dashboard with the following elements:

- Menu Bar:** Includes 'Home', 'Search', 'Manage', and 'Preferences'. The 'Search' link is circled in red.
- Search Dropdown:** A dropdown menu is open under 'Search', listing 'Catalog', 'Purchase Order', and 'eRequisition'. 'Catalog' is highlighted.
- Search Portlet:** A portlet titled 'Search' is visible, containing a 'Keywords:' input field and a 'Search' button. Below the input field, a list of search results is displayed, including categories like 'AGRICULTURAL EQUIPMENT, SUPPLIES & CHEMICALS (1824)', 'APPLIANCES, ELECTRICAL, CLOCKS (10394)', and 'BUILDING MATERIALS, MAINTENANCE (3573)'. The 'Search' button in this portlet is also circled in red.
- Callout Box:** A yellow callout box at the bottom left states: "Users can access system searches in two ways 1) The 'Search' link from the Menu Bar or 2) The 'Search' Portlet on the NC E-Procurement Dashboard." Arrows point from this box to the 'Search' link in the menu bar and the 'Search' portlet.

Note: System Searches conducted directly from the **'Search'** Portlet will use default search filters. Clicking the **'Search'** button within the **'Search'** Portlet will bring the user to the **'Search'** page, where further filters and options may be selected.

Note: The **'eRequisition'** search will be used as the example in this process guide.

2. Enter the necessary search criteria in the appropriate fields to conduct the system search.
3. Add or remove search filters, as necessary, by clicking the **'Search Options'** link.



Note: Users with the appropriate permissions can change the **'Type'** listed at the top of the **'Search'** page. Available categories include: eRequisition, Purchase Order, Receipt, and User Profile. Select the appropriate category to return the desired transaction type.

Note: The **'Requester'** field will automatically default to the user currently logged into NC E-Procurement unless the User has the Global Reporting Role. For Users with the Global Reporting Role, this field will default to **'(select a value).'** Users can update this field, but if the User does not have the Global Reporting Role, the search results will not contain anything for other Users.

Note: The **'Entity'** field will automatically default to the entity associated with the current user. This value can only be changed for users with cross-entity reporting permissions. All other users can only search for transactions associated with their entity.



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- Once **'Search Options'** has been clicked, users can add or remove search filters by selecting the desired search filter from the **'Search Options'** pop-up window.

Note: Only the fields selected from the **'Search Options'** pop-up window now appear on the **'Search Filters'** page.

- After entering the appropriate information in the search fields, click the **'Search'** button to complete the system search.

Note: Use the **'Requester'** search filter to increase the speed at which the search results are returned. This field is especially important when searching by **'Government Grant ID'** and **'Title,'** which are free-text fields and take longer time to search.

Note: Running searches that are too broad (such as starting an eRequisition search without setting any filters, which would attempt to return all eRequisitions in NC E-Procurement) can be slow and



return too much data, making it difficult to find the data for which you are looking. Utilizing the concept of smart searching can help lessen the amount of time it takes to perform a search. It is usually best to start with a narrow search, using as many filters as may apply, and broaden your search as needed until you find that for which you are searching.

6. To **save** this search for future use, click the **'Save Search'** button.

The screenshot shows the NCE-Procurement search interface. The search type is set to 'eRequisition'. The search filters section includes fields for Title, ID, Bid Number (any line item), Commodity Code (any line item), Date Created, Legacy Document Id, Requester, Status, Supplier (any line item), and Total Cost. The search results table shows one item: 'Test eRequisition' with status 'Composing', date 'Today, 5:00 PM', and total cost '\$0.00000 USD'. A yellow callout box points to the 'Save Search' button and says 'All search results meeting the criteria are displayed.' Another yellow callout box points to the 'Date Created' column header and says 'Users can sort the search results by clicking on the appropriate column header.'

7. Enter a search name in the **'Search Name'** field.

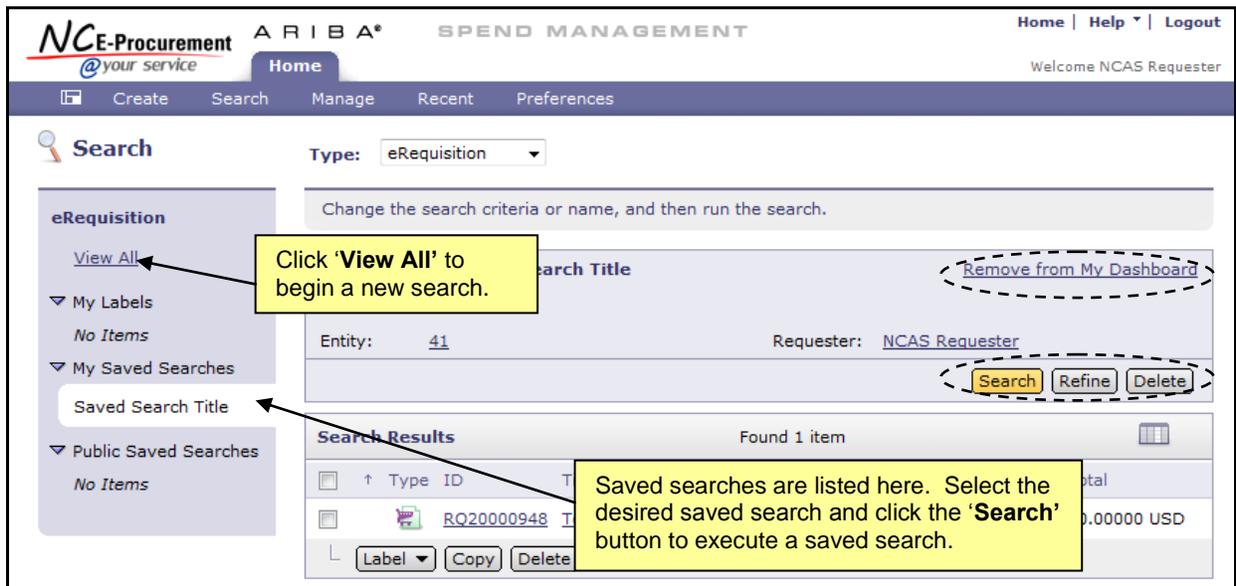
8. Click **'OK'**.

The screenshot shows the 'Save Search' dialog box. The dialog box has a title bar 'Save Search' and buttons 'OK' and 'Cancel'. The main text says 'Save the search to use again at a later time. If you have the required permission, you can save the search as a system search for use by all users.' The 'Search Name' field contains 'Saved Search Name'. The 'Search Category' is 'eRequisition'. The 'Search Filters' are 'Entity = 41, Requester = NCAS Requester'. The 'OK' button is circled with a dashed line.

- Saved searches will appear on the Shortcut Menu for the specific **Type** of search that was saved (e.g., eRequisition or Purchase Order).

Note: Saved searches also appear on the NC E-Procurement Dashboard in the **'Search'** Portlet for the specific **Type** of search. To remove the saved search from the NC E-Procurement Dashboard, click **'Remove from My Dashboard.'** This will not delete the saved search, but it will remove it from the **'Search'** Portlet.

- To delete a saved search, click the top **'Delete'** button while viewing the saved search. To edit a saved search, click the **'Refine'** button.



The screenshot shows the NC E-Procurement Search interface. The 'Type' dropdown is set to 'eRequisition'. A sidebar on the left lists search categories: eRequisition, My Labels, My Saved Searches, and Public Saved Searches. A yellow callout box points to the 'View All' link under eRequisition, stating: "Click 'View All' to begin a new search." Another yellow callout box points to the 'Search' button in the search results area, stating: "Saved searches are listed here. Select the desired saved search and click the 'Search' button to execute a saved search." A dashed oval highlights the 'Remove from My Dashboard' link, and another dashed oval highlights the 'Search', 'Refine', and 'Delete' buttons.

Note: If you do not see a particular saved search, try selecting a different option from the **'Type'** drop-down menu. This also applies to the **'Search'** Portlet on the NC E-Procurement Dashboard.

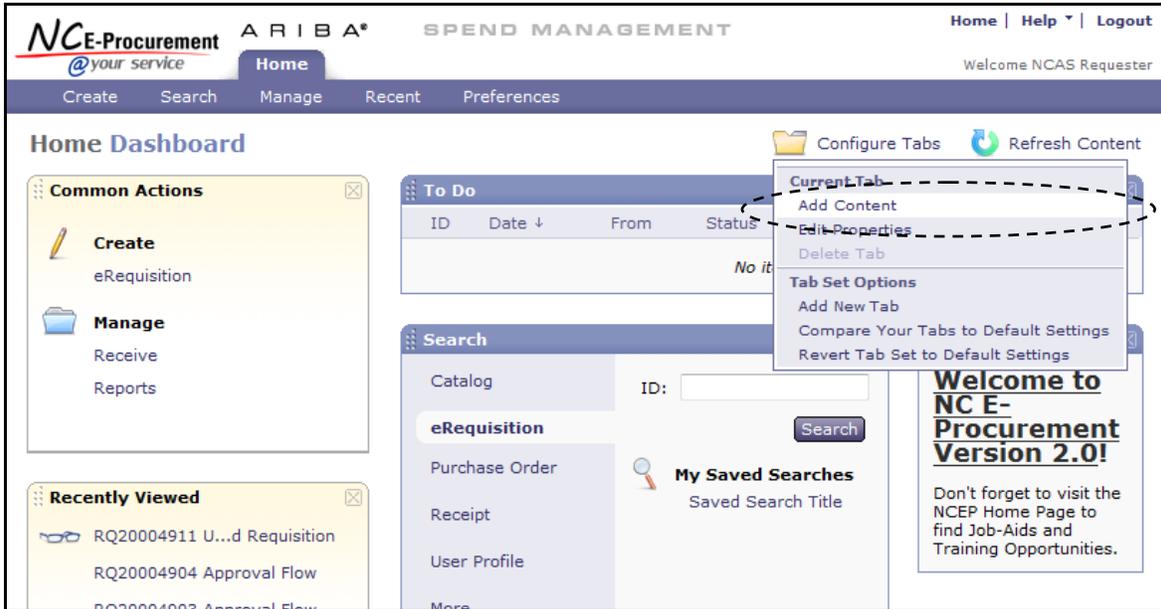


The screenshot shows the Search portlet with a sidebar on the left containing options: Catalog, eRequisition, Purchase Order, Receipt, User Profile, and More... The 'eRequisition' option is selected. A yellow callout box points to the 'eRequisition' option, stating: "Saved searches will only appear if the specific **Type** of search is selected." A dashed oval highlights the 'My Saved Searches' section, which contains a 'Search Title'.

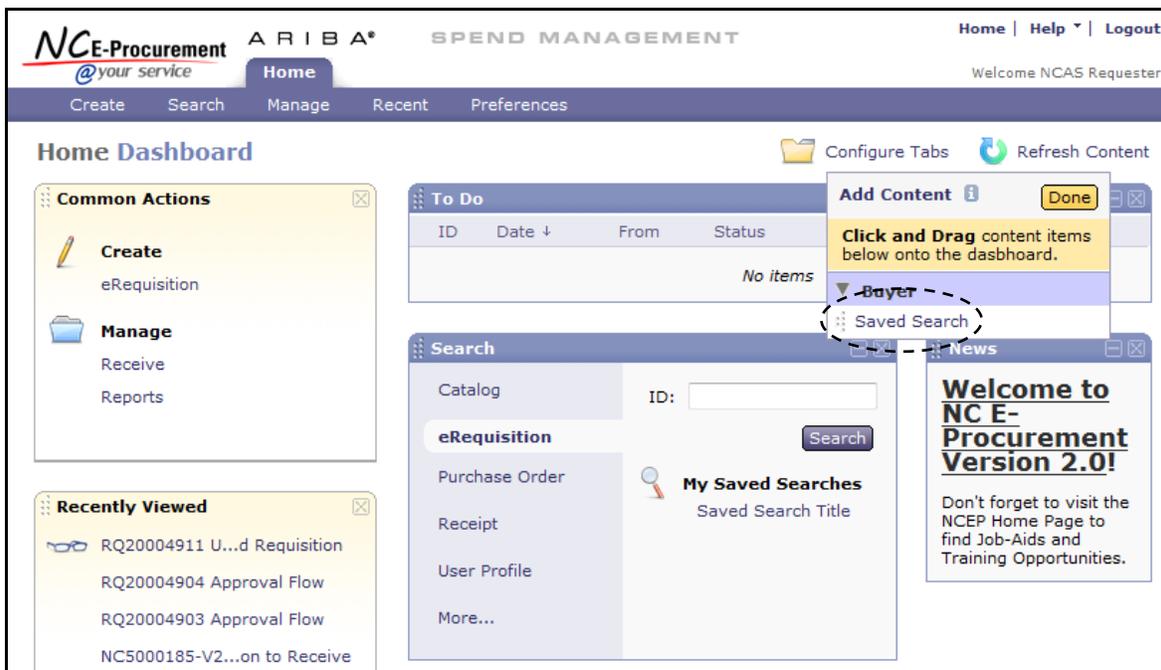


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11. A saved search may also be added as a Portlet to the NC E-Procurement Dashboard. From the NC E-Procurement Dashboard, click **'Configure Tabs'** and select **'Add Content.'**



12. Click **'Saved Search'** on the **'Add Content'** pop-up window.





13. The 'Configure Dashboard Saved Search Content' page will appear. Click the 'Select' button next to the saved search that will be added to the NC E-Procurement Dashboard.



14. The user will be returned to the NC E-Procurement Dashboard, and the saved search will now appear as its own Portlet. Click 'Done' in the 'Add Content' pop up window to finish adding content to the NC E-Procurement Dashboard.

