

8a. Search

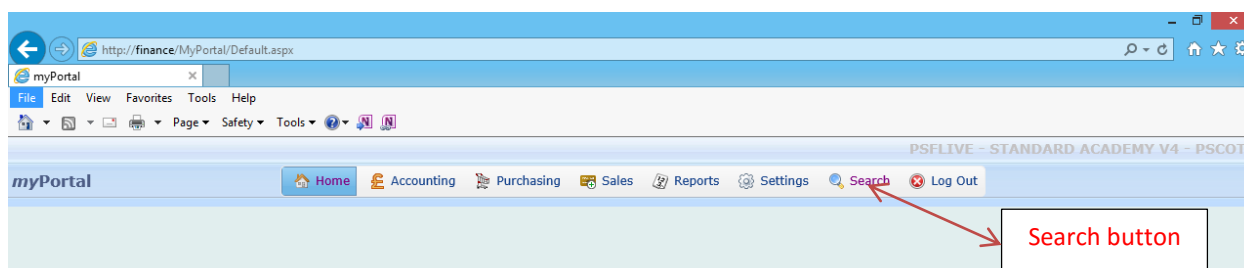
How to Search in myPortal

In these guidance notes you will find;

- 1) Search Fields – What to include?
- 2) Show / Hide Columns Headings for Search Results
- 3) Search Hints & Tips – Using a Wildcard
- 4) Purchase Order Search
- 5) Unauthorised Purchase Order Search
- 6) Goods Received Note Search

1. Search Fields – What to include?

Select Search:

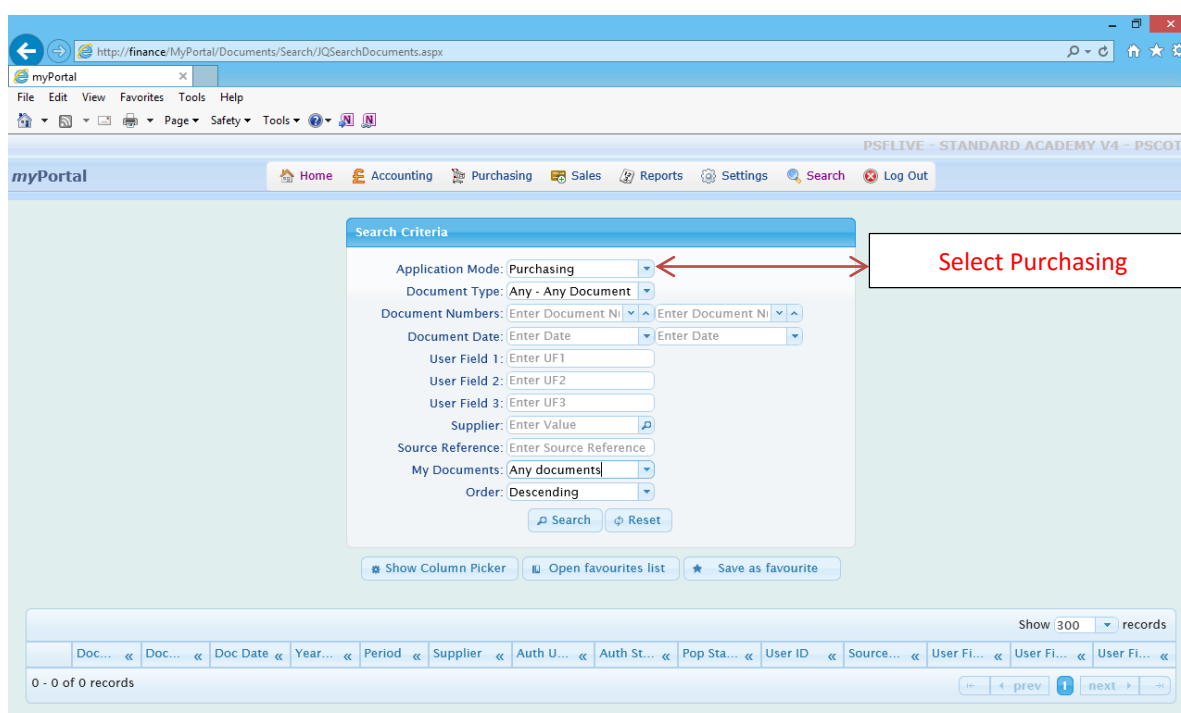


i. Application Mode:

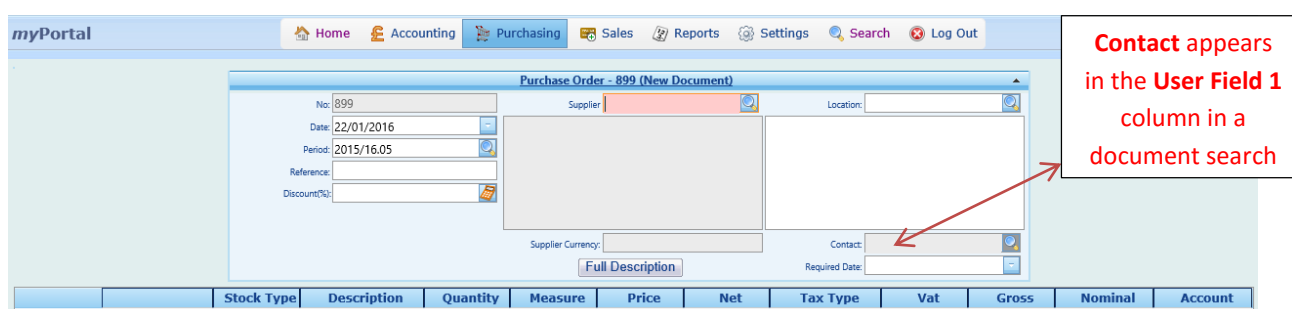
There are 3 **Application Modes** in Search Criteria, as follows:

1. Accounting – No user option available
2. **Purchasing**
3. Sales – No user option available

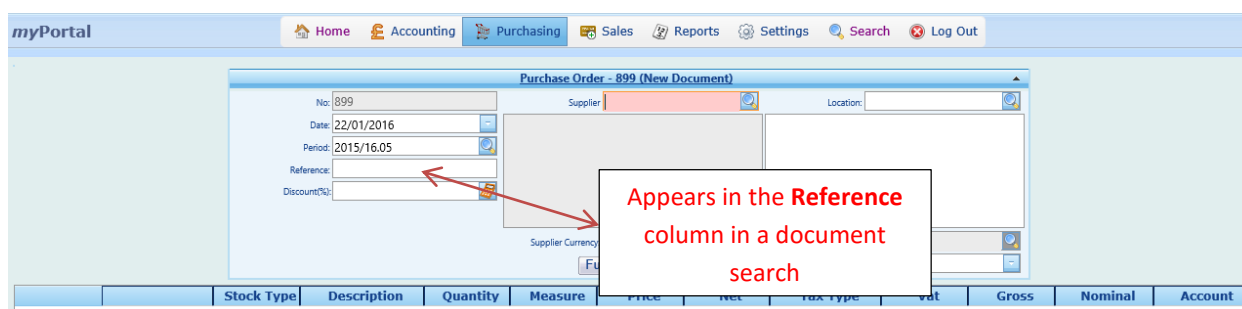
End Users will only need the **Application Mode** called **Purchasing**.



- ii. **Document Type**
 - Any – Any Document Returns all document type records
 - **GRN – Goods Received Note** Returns all **Goods Received Note records**
 - INV – Purchase Invoice Returns all Purchase Invoice records
 - **PORD – Purchase Order** Returns all **Purchase Order records**
- iii. **Document Number**
 - **Document Number From / Document Number To** Search a range of document numbers
- iv. **Document Date**
 - **Document Date From / Document Date To** Search a range of document dates
- v. **User Field 1**
 - **Contact Name** entered on the **Purchase Order Requisition**



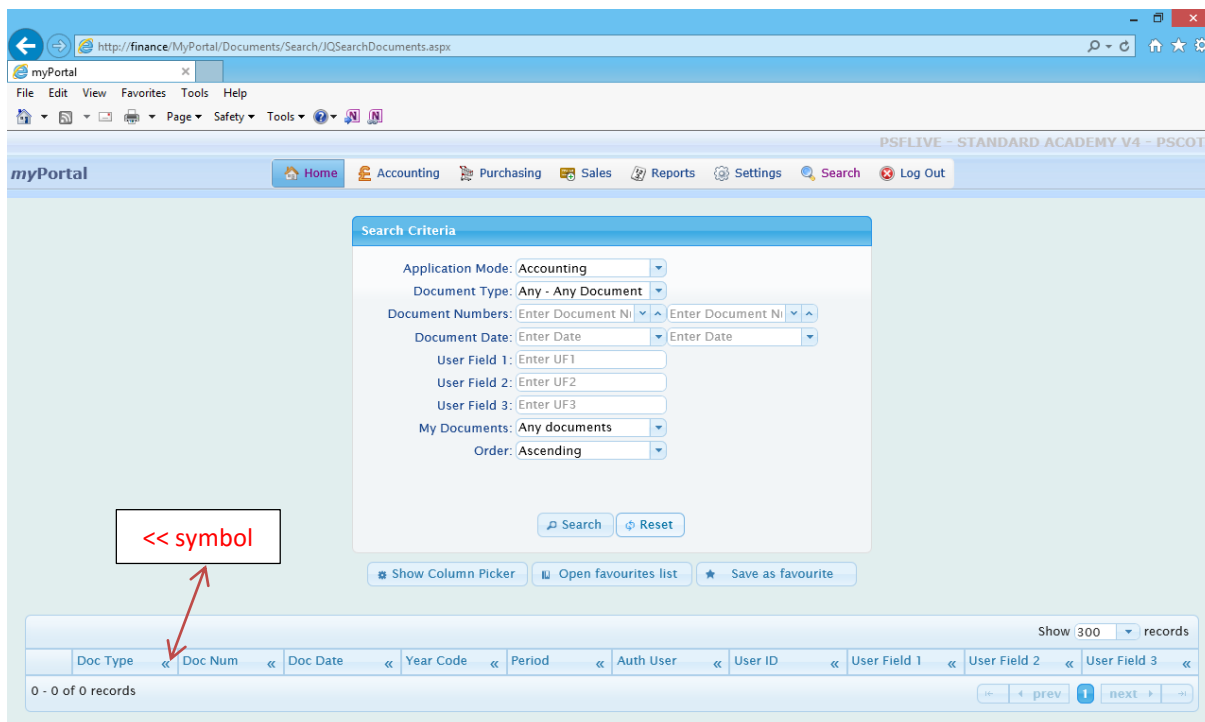
- vi. **User Field 2**
 - contains no searchable information
- vii. **User Field 3**
 - contains no searchable information
- viii. **Supplier**
 - contains the **Supplier Name** code
- ix. **Source Reference**
 - contains the **Reference** entered on the **Purchase Order Requisition**



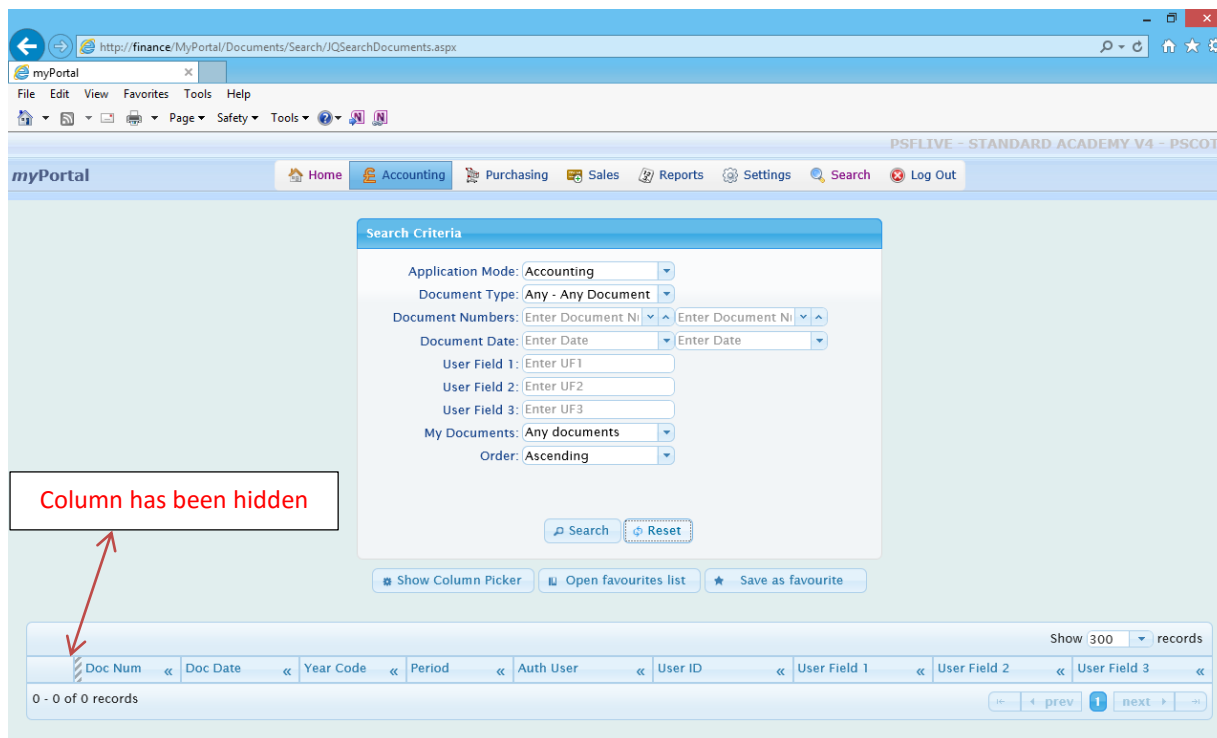
- x. **My Documents**
 - Any Documents Returns all document type record, restricted by user security settings
 - Belonging to me Returns all document personally created
 - Awaiting my authorisation Returns all document record(s) awaiting your approval
 - Created by me Returns any document type record created by you
 - Drafts Returns any document type record created by you
- xi. **Order**
 - Descending Results are displayed **most recent at the top** of the search table
 - Ascending Results are displayed **oldest at the top** of the search table

2. Show / Hide Column Headings for Search Results

Use your mouse to hover over the << symbol and left click,



The column headed **Doc Type** has now been hidden, as shown below. The column has been replaced with a zig-zag bar to show the column is hidden, as shown below;



Use your mouse to hover over the zig-zag bar and left click. A drop down box called **Column Chooser** will appear on screen, as shown below;

Using the mouse, left click to select. The Column Chooser screen will expand, as shown below. Select the Columns you want to **Show / Hide** and press **Apply**. If you want all columns to **Show**, press the **Reset** button.


3. Wildcard Supplier Searches

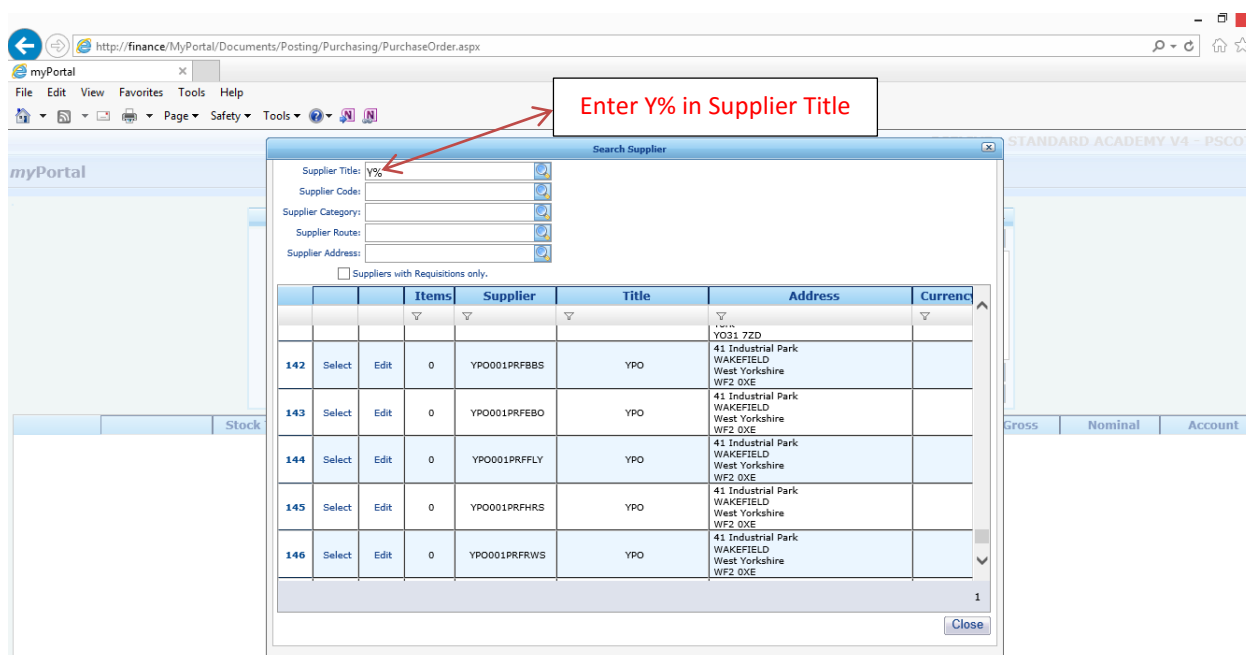
!NOTE (The % symbol is a wildcard) NOTE!

Entering a % in any search field searches ALL records in that category. Records are listed in alphabetical order. The total number of records returned is **restricted to the first 300**.

It is often necessary to narrow the number of records returned by entering any known information e.g. the first letter of the company title, followed by the wildcard (%), as shown below;

Example

To search for supplier “*Yorkshire Purchasing Organisation*”. Enter **Y%** in the Supplier Title and press the spyglass ;



All records beginning with the letter **Y** are display in alphabetical order. Press **Select** against the supplier you want to raise a **Purchase Order Requisition** for.

4. Purchase Order Search – returns ALL Purchase Order records

- Step 1. Application Mode Purchasing
- Step 2. Document Type PORD – Purchase Orders
- Step 3. My Documents Any Document

All Purchase Order documents will be returned, security settings permitting.

Doc...	Doc...	Doc D...	Year...	Period	Supplier	Auth User	Auth Status	Pop Status	User ID	Source Refer...
PORD	896	22/01/20...	2015/16	05	YPO		Document Created	Purchase Order Requisitions		
PORD	895	21/01/20...	2015/16	05	City of York Council	COMPLETED	Document Authorised	Purchase Order Authorisations		
PORD	894	21/01/20...	2015/16	05	YPO	COMPLETED	Document Authorised	Purchase Order Authorisations		

5. Goods Received Note Search – returns ALL Goods Received Note records

- Step 1. Application Mode Purchasing
- Step 2. Document Type GRN - Goods Received
- Step 3. My Documents Any Document

All Goods Received Note documents will be returned, security settings permitting.

Doc...	Doc...	Doc D...	Year...	Period	Supplier	Auth U...	Auth St...	Pop St...	User ID	Source...	User Fl...	User Fl...	User Fl...
GRN	672	27/01/20...	2015/16	05	Ben Johnson Limited		Document Created	Goods Received					
GRN	671	27/01/20...	2015/16	05	Professional Paper		Document Created	Goods Received					