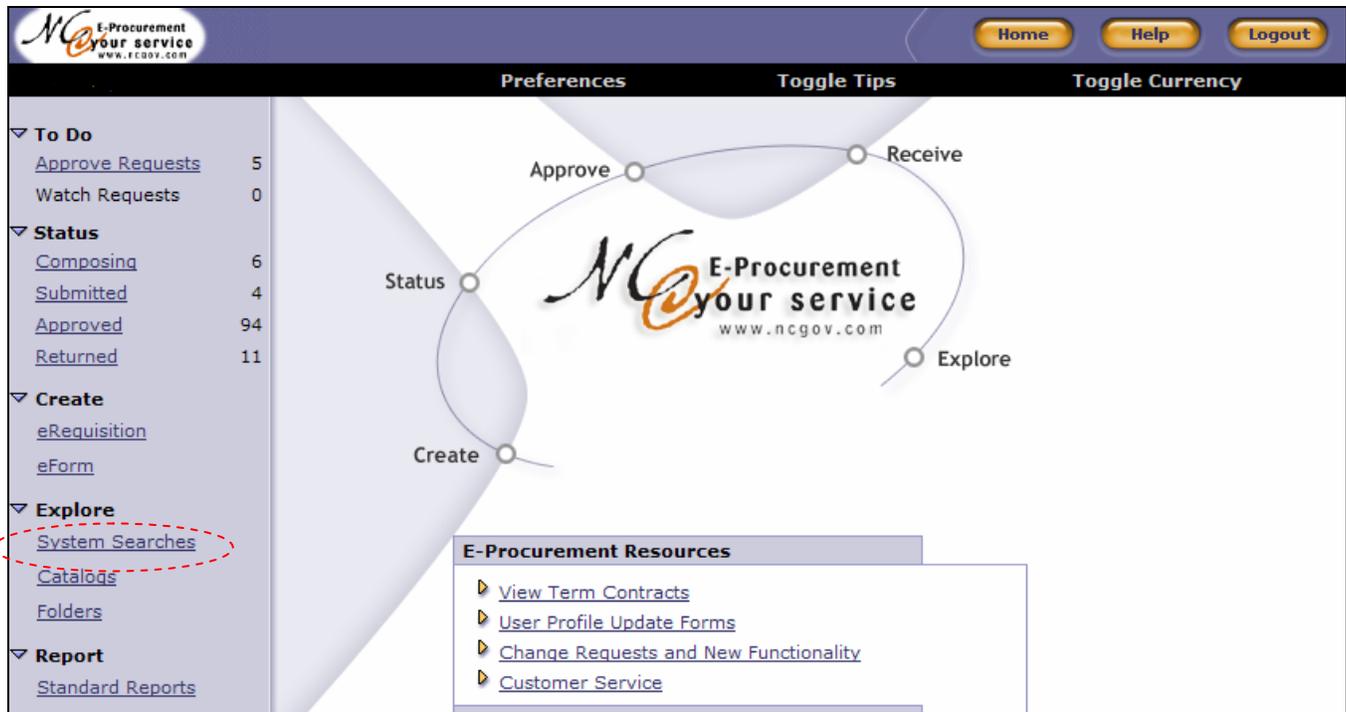
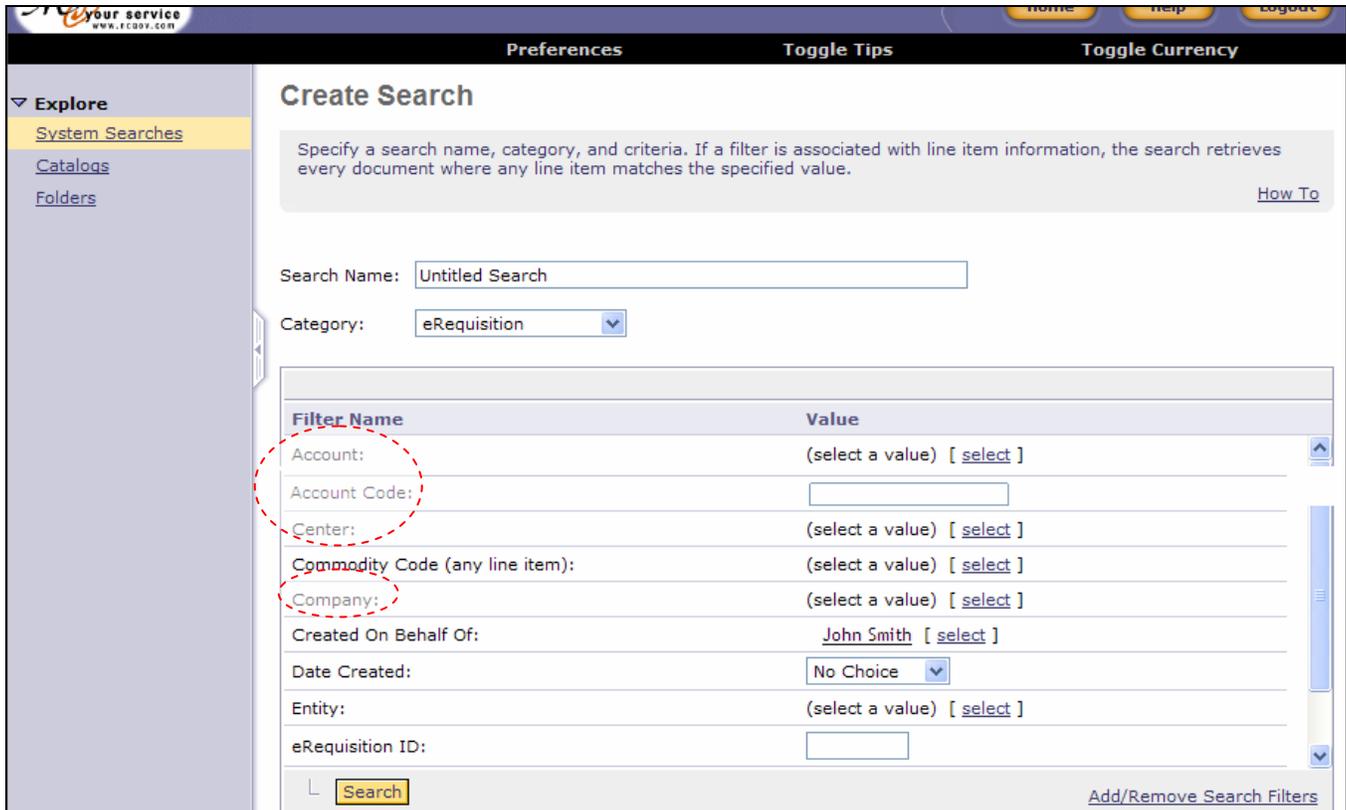


Add Accounting Fields to System Search Filters

Accounting related fields are now available on the **System Search** pages within the NC E-Procurement system. These fields will allow users to create searches for specific **Company**, **Account**, or **Center** codes, or any accounting combination.



1. Select 'System Searches' from the left navigation menu.



Create Search

Specify a search name, category, and criteria. If a filter is associated with line item information, the search retrieves every document where any line item matches the specified value. [How To](#)

Search Name:

Category:

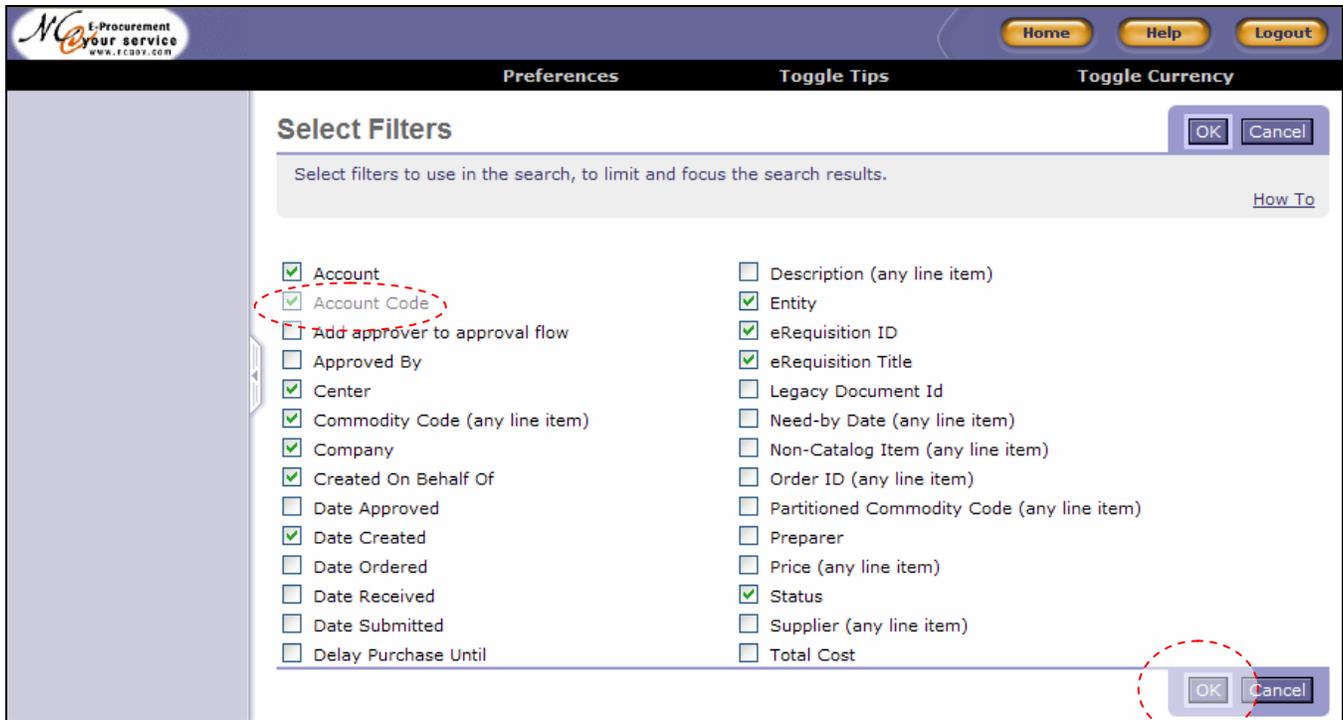
Filter Name	Value
Account:	(select a value) [select]
Account Code:	<input type="text"/>
Center:	(select a value) [select]
Commodity Code (any line item):	(select a value) [select]
Company:	(select a value) [select]
Created On Behalf Of:	John Smith [select]
Date Created:	No Choice <input type="text"/>
Entity:	(select a value) [select]
eRequisition ID:	<input type="text"/>

[Add/Remove Search Filters](#)

- When creating a new search, the 'Company', 'Account', 'Center', and 'Account Code' fields will be displayed alphabetically.

Note: The 'Account Code' field will return no search results. You may remove this search filter from current and future searches by clicking the 'Add/Remove Search Filters' link.

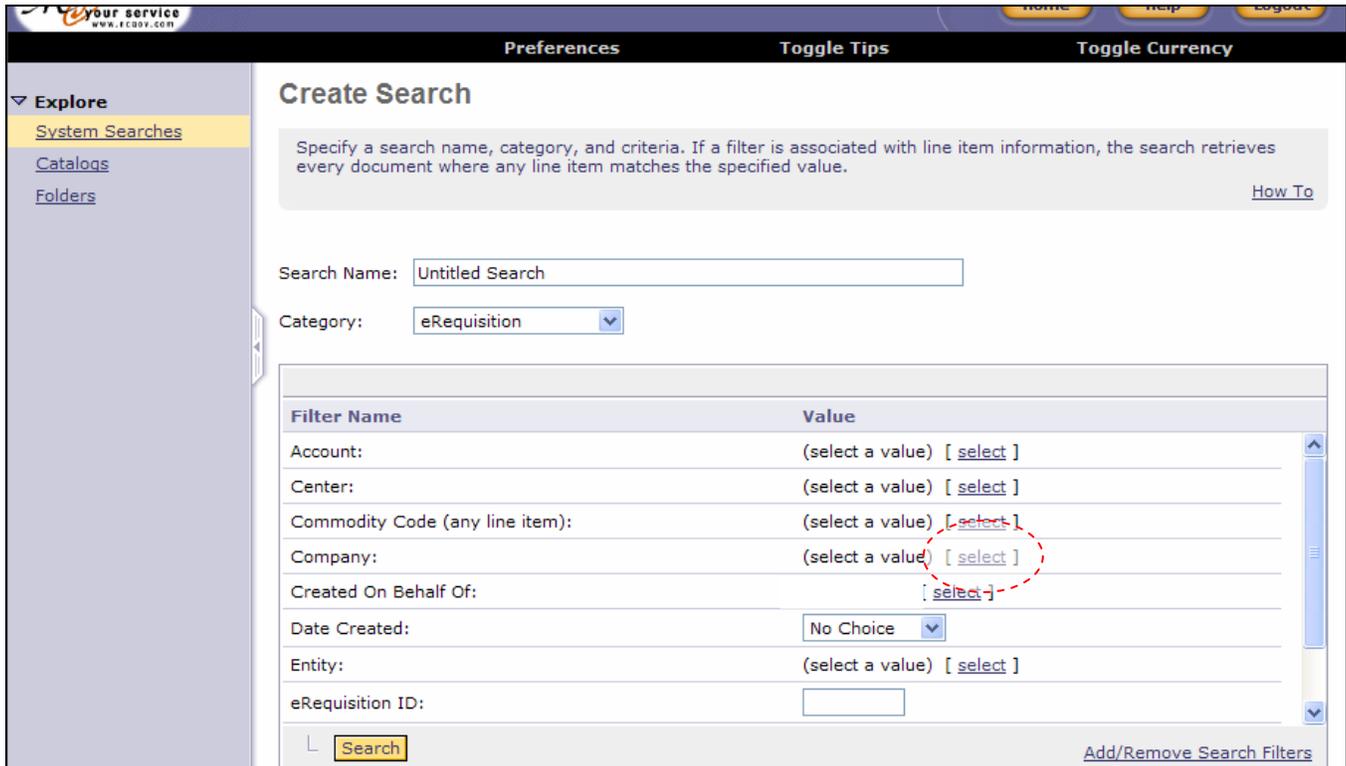
- Click the 'Add/Remove Search Filters' link.



4. Remove the 'Account Code' filter from your search page by un-checking the box.
5. Click 'OK'.

Note: Once removed, this filter will not display on the default search page unless it is re-added. The **Company**, **Account**, and/or **Center** filters may also be removed/added using this process.

Creating a Search



The screenshot shows the 'Create Search' page in the NC E-Procurement system. The page has a navigation menu on the left with 'System Searches' selected. The main content area includes a search name field (containing 'Untitled Search'), a category dropdown (set to 'eRequisition'), and a table of search filters. The 'Company' filter's 'select' button is circled in red. At the bottom, there is a 'Search' button and a link to 'Add/Remove Search Filters'.

Create Search

Specify a search name, category, and criteria. If a filter is associated with line item information, the search retrieves every document where any line item matches the specified value. [How To](#)

Search Name:

Category:

Filter Name	Value
Account:	(select a value) [select]
Center:	(select a value) [select]
Commodity Code (any line item):	(select a value) [select]
Company:	(select a value) [select]
Created On Behalf Of:	[select]
Date Created:	No Choice <input type="text"/>
Entity:	(select a value) [select]
eRequisition ID:	<input type="text"/>

[Add/Remove Search Filters](#)

1. To search for a specific **Company** code, click 'Select' for the 'Company' field.

Note: The accounting fields are not required to execute a system search. A user may enter a value for one or all of the above fields to complete the search.

Choose Values for Company

Currently Selected

<input type="checkbox"/>	Company Name	Company Description
No items		

Add to Currently Selected

To add one or more values to the list of those currently selected, browse the values in the Add section of the current or other pages, or search for a specified value, and then click the value's check box. When you navigate to another page of values, any values selected in the Add section are automatically added to the list of currently selected values. To remove values from the list of those currently selected, click a value's check box to deselect it. When you are finished selecting or deselecting values, click **OK**.

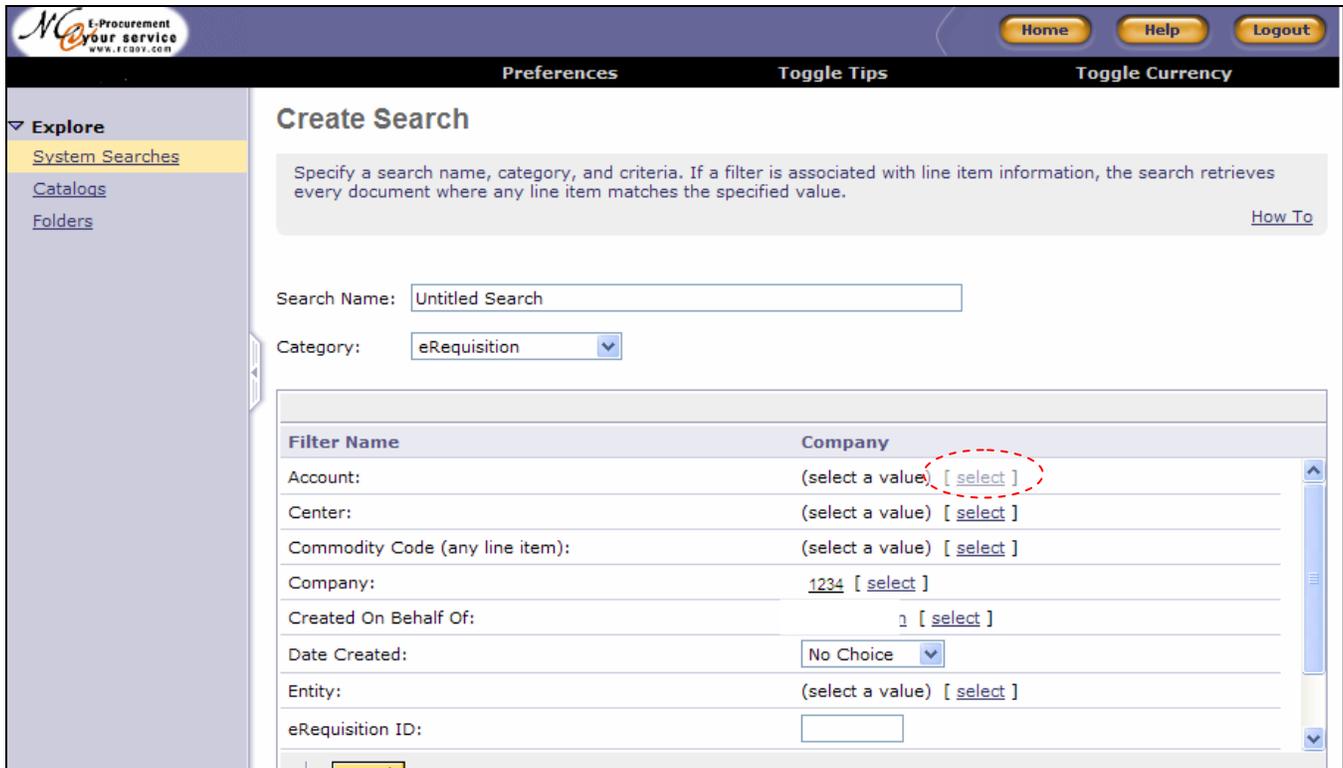
How To

Field: Company Name Search

<input type="checkbox"/>	Company Name	Company Description
<input checked="" type="checkbox"/>	1234	GENERAL FUND
<input type="checkbox"/>	5678	ACCOUNTING
<input type="checkbox"/>	2222	INTERNET SERVICES

2. Enter either the **Company Name** or **Company Description** in the search field and click '**Search**'.
3. Select the **Company** code(s) to be added to your search by placing a checkmark in the appropriate box.
4. Click '**OK**'.

Note: A **Company** code may be displayed more than once, as each **Company** code is associated with a specific **Account** and **Center** combination. If a **Company** code is displayed more than once, please select **all** to make certain that accurate search results are returned.



NC E-Procurement your service Home Help Logout

Preferences Toggle Tips Toggle Currency

Create Search

Specify a search name, category, and criteria. If a filter is associated with line item information, the search retrieves every document where any line item matches the specified value. [How To](#)

Search Name:

Category:

Filter Name	Company
Account:	(select a value) [select]
Center:	(select a value) [select]
Commodity Code (any line item):	(select a value) [select]
Company:	1234 [select]
Created On Behalf Of:	1 [select]
Date Created:	No Choice <input type="text"/>
Entity:	(select a value) [select]
eRequisition ID:	<input type="text"/>

- To search for a specific **Account** code, click **'Select'** for the **'Account'** field.

Choose Values for Account

Currently Selected

<input type="checkbox"/>	Account Name	Account Description
No items		

Add to Currently Selected

Field: Account Name Search

<input type="checkbox"/>	Account Name	Account Description
<input type="checkbox"/>	12345	ACCOUNTING
<input type="checkbox"/>	11111	FINANCE OFFICE
<input type="checkbox"/>	11111	PAYROLL
<input type="checkbox"/>	33333	EMPLOYEE PROGRAM
<input type="checkbox"/>	44444	FOOD
<input type="checkbox"/>	55555	AUDIT
<input type="checkbox"/>	66666	HR

6. Enter either the **Account Name** or **Account Description** in the search field and click **'Search'**.

Note: An **Account** code may be associated with multiple **Company** codes. When searching by **Account Name**, if there are too many search results to display, users may enter the related **Account Description** for more concise results.

7. Select the **Account** code(s) to be added to your search by placing a checkmark in the appropriate box.
8. Click **'OK'**.

Note: Since an **Account** code is associated with a specific **Company** and **Center** combination, the specific value may be displayed more than once. If an **Account** code is displayed more than once, please select **all** to make certain that accurate search results are returned.

The screenshot shows the 'Create Search' page in the NC E-Procurement system. The page has a navigation bar with 'Home', 'Help', and 'Logout' buttons. Below the navigation bar, there are tabs for 'Preferences', 'Toggle Tips', and 'Toggle Currency'. On the left side, there is a sidebar with 'Explore' and 'System Searches' selected. The main content area is titled 'Create Search' and contains a text box for 'Search Name' (Untitled Search) and a dropdown for 'Category' (eRequisition). Below these are several filter fields, each with a 'select' button. The 'Center' filter is circled in red. The filters are:

Filter Name	Company
Account:	1111.1111 [select]
Center:	(select a value) [select]
Commodity Code (any line item):	(select a value) [select]
Company:	1234 [select]
Created On Behalf Of:	[select]
Date Created:	No Choice [v]
Entity:	(select a value) [select]
eRequisition ID:	[text box]

9. To search for a specific **Center** code, click 'Select' for the 'Center' field.

Choose Values for Center

Currently Selected

<input type="checkbox"/>	Center Name	Center Description
No items		

Add to Currently Selected

Field: Center Name Search

<input type="checkbox"/>	Center Name	Center Description
<input type="checkbox"/>	12345	ACCOUNTING
<input type="checkbox"/>	4567	FINANCE OFFICE
<input type="checkbox"/>	11111	PAYROLL
<input type="checkbox"/>	6789	EMPLOYEE PROGRAM
<input type="checkbox"/>	4444	FOOD
<input type="checkbox"/>	55555	AUDIT

10. Enter either the **Center Name** or **Center Description** in the search field and click 'Search'.

Note: A **Center** code may be associated with multiple **Company** and **Account** codes. When searching by **Center Name**, if there are too many search results to display, users may enter the related **Center Description** for more concise results.

11. Select the **Center** code(s) to be added to your search by placing a checkmark in the appropriate box.

12. Click 'OK'.

Note: Since a **Center** code is associated with a specific **Company** and **Account** combination, the value may be displayed more than once. Please select **all** to make certain that accurate search results are returned.

The screenshot shows the 'Create Search' interface. On the left is a navigation menu with 'Explore', 'System Searches', 'Catalogs', and 'Folders'. The main area is titled 'Create Search' and contains a text box for 'Search Name' (containing 'Untitled Search') and a dropdown for 'Category' (set to 'eRequisition'). Below these is a table of filters:

Filter Name	Company
Account:	1111.1111 [select]
Center:	4444 [select]
Commodity Code (any line item):	(select a value) [select]
Company:	1234 [select]
Created On Behalf Of:	[select]
Date Created:	No Choice [v]
Entity:	(select a value) [select]
eRequisition ID:	<input type="text"/>

A red dashed circle highlights the 'Search' button located at the bottom left of the filter table.

13. Once the accounting information has been added, click 'Search'.

Preferences Toggle Tips Toggle Currency

Review Search Results

Search Name: Untitled Search

Search Category: eRequisition

Search Filters: Entity = 14, Created On Behalf Of = John Smith, Company = 1234 , Account in (1111 , 1111), Center = 4444

Save Search Refine Search

Items that meet your search criteria: 75

<input type="checkbox"/>	Type	Date Created	Title	Status	ID	Total
<input type="checkbox"/>		Tue, 15 Apr, 2008	Untitled eRequisition	Receiving	PR82A77	\$835.96USD
<input type="checkbox"/>		Tue, 20 May, 2008	Untitled eRequisition	Receiving	PR82A180-V2	\$788.04USD
<input type="checkbox"/>		Tue, 20 May, 2008	Untitled eRequisition	Receiving	PR82A185-V2	\$788.04USD
<input type="checkbox"/>		Mon, 14 Jul, 2008	Untitled eRequisition	Submitted	PR82A200	\$153.38USD
<input type="checkbox"/>		Mon, 14 Jul, 2008	ECR46 Test 2	Returned	PR82A209	\$153.38USD
<input type="checkbox"/>		Mon, 14 Jul, 2008	ECR46 Test 1	Ordered	PR82A213	\$153.38USD

Copy Delete

14. The **Review Search Results** page displays the **Company, Account, and/or Center** codes used in the search.