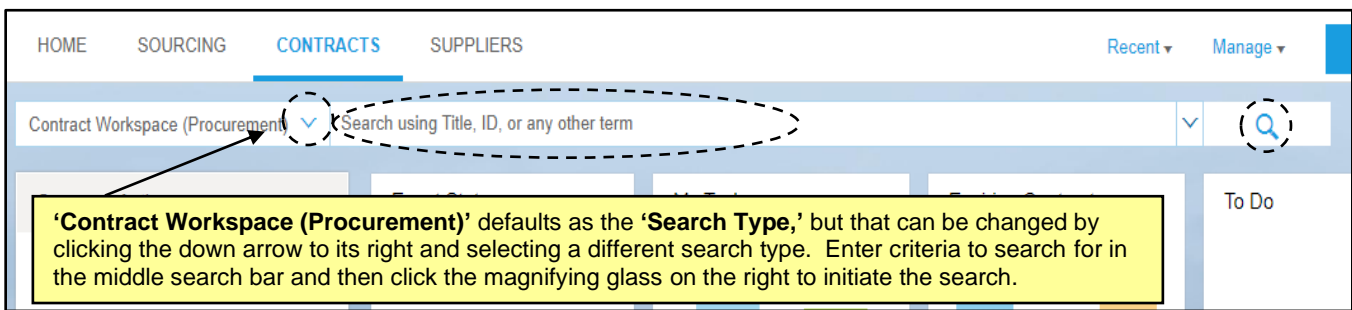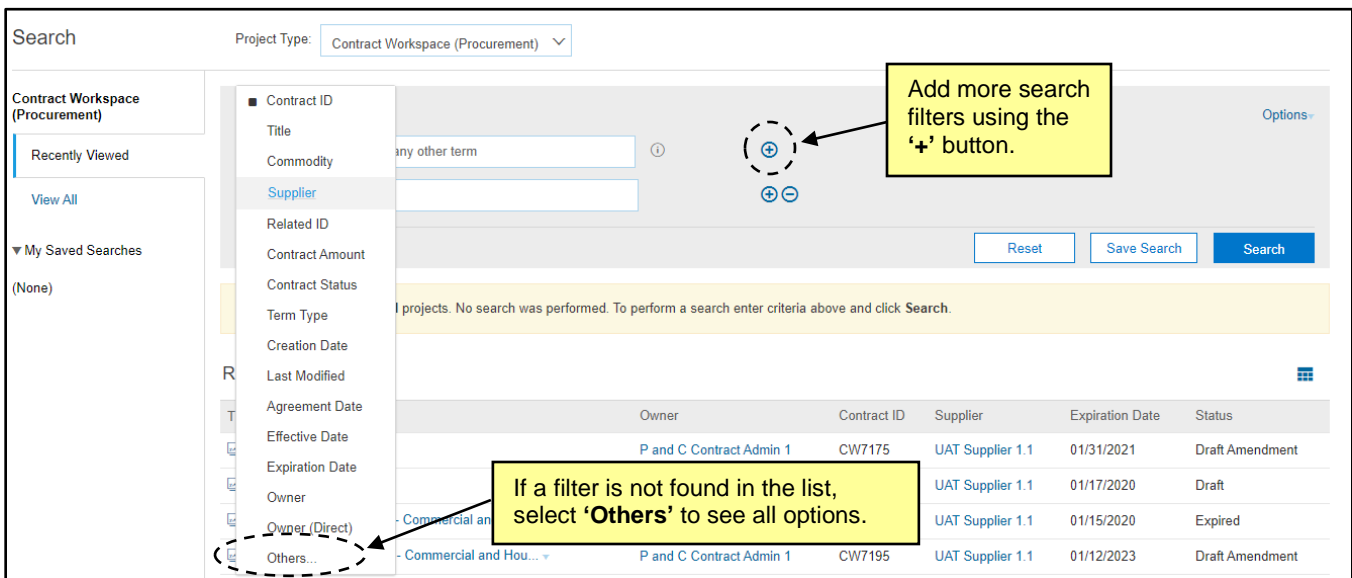# NC eProcurement

Searching for a Contract Workspace

Users can search for Contract Workspaces (CW), reports, documents, and other items using the search functionality.

I. Using the Search Bar

1. Access the **'Contracts'** tab and locate the **'Search Bar'** in the upper section of the dashboard.

2. The **'Contract Workspace (Procurement)'** selection is defaulted in the **'Search Bar,'** but the type of item to be searched for can be changed by clicking the down arrow to the right of the **'Search Type'** selection box. A large drop-down menu will appear, and the user can select what other type of search to conduct. Enter a search term in the search box and click the magnifying glass icon to initiate the search.

> **'Contract Workspace (Procurement)'** defaults as the **'Search Type,'** but that can be changed by clicking the down arrow to its right and selecting a different search type. Enter criteria to search for in the middle search bar and then click the magnifying glass on the right to initiate the search.

3. The search results will be returned on a new page, the **'Search Screen.'** Additional search filters are available by clicking the **'+'** button. Click the menu to the left of the search field to choose which filter to use to narrow the results. Preference is given to commonly used filters, but all filters can be accessed by selecting **'Others'** at the bottom of the menu.

> Add more search filters using the **'+'** button.

> If a filter is not found in the list, select **'Others'** to see all options.

4. Clicking the **'Options'** link in the upper-right portion of the **'Search Screen'** will display a drop-down from which other user-related parameters can be set, including the defaulted **'Contracts I can view'** or the more specific **'Contracts I directly own.'**

5. When the item being searched for appears in the **'Search Result'** section, click on its **'Title'** and select **'Open'** from the drop-down menu to navigate to that CW or other item.

II. Saving a Search

If a search is done frequently, it can be set up as a '**Saved Search'** rather than resetting the filters each time.

1. On the **'Contracts'** tab, select the correct document type and click the magnifying glass icon in the **'Search Bar'** to initiate the search

2. Enter the additional criteria that is commonly used and click the **'Save Search'** button.

3. On the subsequent **'Save Search'** window, enter a name for the **'Saved Search'** and review the search criteria before clicking **'OK'** to save the search.

Save Search

Save the search to use again at a later time.

Search Name: * [Expiring This Month]

Display Only: Projects

Permissions: Contracts I can view

Project Search Category: Contract Workspace (Procurement)

Project Search Filters: Expiration Date = This Month (between Sat, 1 Feb, 2020 and Sat, 29 Feb, 2020) Is Contract Request = false

Enter a name for the **'Saved Search'** and click **'OK.'**

[OK] [Cancel]

4. Search results will display, and all **'Saved Searches'** can be managed by clicking on the **'Manage Saved Searches'** link in the top right of the **'Search Screen.'**

Project Type: Contract Workspace (Procurement) ▾   Manage Saved Searches

Welcome to the new Search page. Watch the Tutorial (3 min) to learn more!   ✕

Search Filter   Options▾

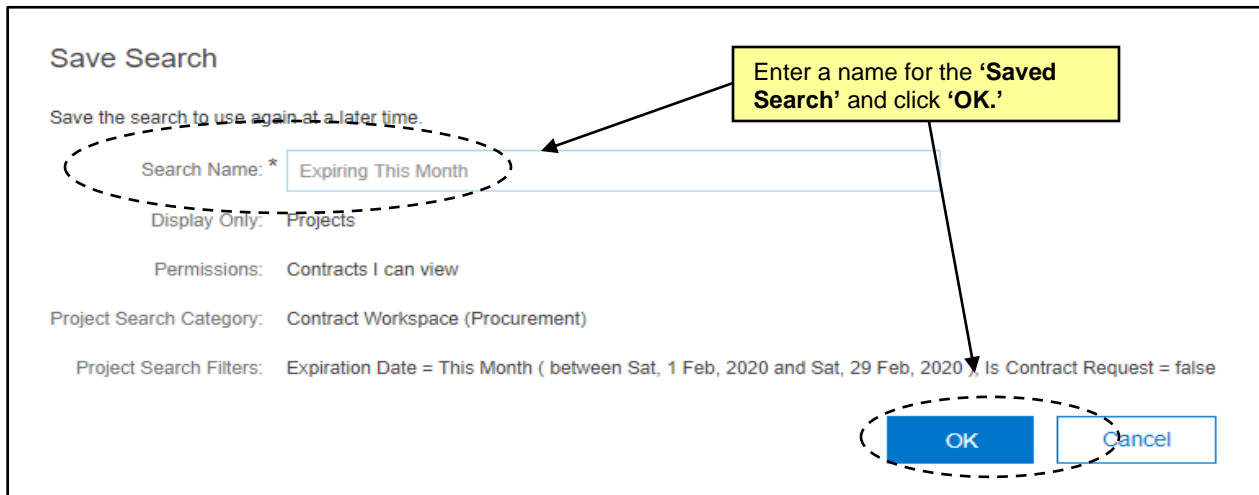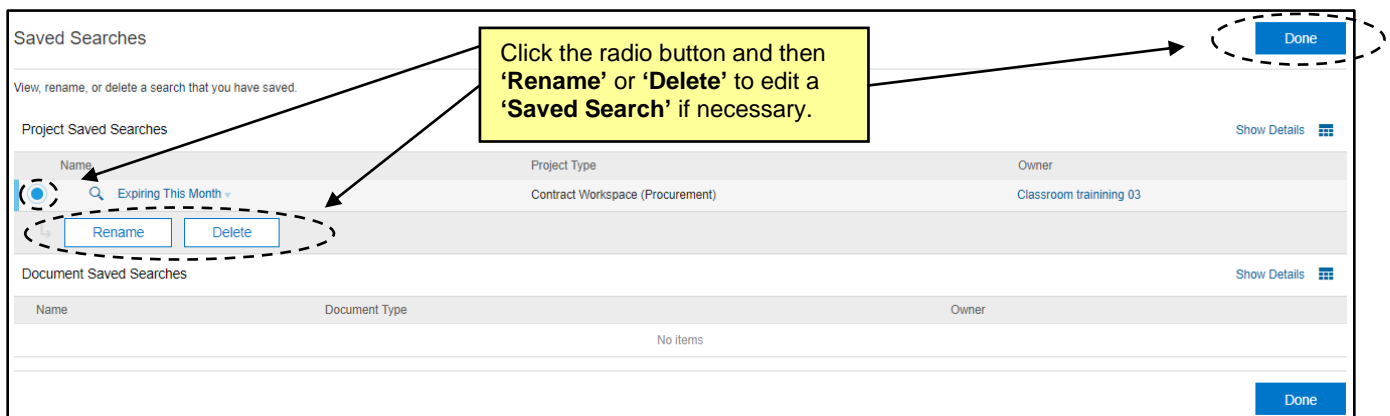[Search using Title, ID, or any other term] ⓘ

[Expiration Date ▾] [This Month ▾] From: 02/01/2020 To: 02/29/2020 ⊕⊖

Click the **'Manage Saved Searches'** link for further information on previously saved searches.

[Reset] [Save Current Search] [Save As New Search] [Search]

3. Click the radio button next to the specific **'Saved Search'** and click **'Delete'** or **'Rename'** if the search needs to be edited or deleted, then click **'Done'** to initiate the change.

Saved Searches   [Done]

View, rename, or delete a search that you have saved.

Project Saved Searches   Show Details ▦

Name	Project Type	Owner
⦿ 🔍 Expiring This Month ▾	Contract Workspace (Procurement)	Classroom training 03

[Rename] [Delete]

Click the radio button and then **'Rename'** or **'Delete'** to edit a **'Saved Search'** if necessary.

Document Saved Searches   Show Details ▦

Name	Document Type	Owner
	No items	

[Done]

4. **'Saved Searches'** can be accessed by clicking the down arrow on the **'Search Bar'** to the left of the magnifying glass icon. By default, all users will see **'Saved Searches'** for **'My Active Projects'** and **'Active Projects where on team.'**