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.

HOME	SOURCING	CONTRACTS	SUPPLIERS		Recent v	Manage 🗸
Contract W	orkspace (Procurer	ment) 🗸 KSearch u	sing Title, ID, or any other term	>	~	(<u>Q</u>)
clickir	ng the down a	arrow to its righ	t and selecting a differ	'Search Type,' but that car ent search type. Enter crite ss on the right to initiate the	eria to search for in	To Do

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.

Search	Pro	oject Type: Contract	Workspace (Procu	rement) 🗡					
Contract Workspace (Procurement) Recently Viewed		Contract ID Title Commodity	any other term		0 (⊕)		Add more sear filters using the '+' button.		Options-
View All		Supplier Related ID			••				
▼ My Saved Searches		Contract Amount					Reset	Save Search	Search
(None)		Term Type Creation Date	l projects. No sea	arch was performed. To	o perform a search enter criteria a	bove and click S	Search.		
	R	Last Modified							
	T	Agreement Date Effective Date			Owner P and C Contract Admin 1	Contract ID CW7175	Supplier UAT Supplier 1.1	Expiration Date 01/31/2021	Status Draft Amendment
		Expiration Date Owner		If a filter is	not found in the li		UAT Supplier 1.1	01/17/2020	Draft
	E	<u>Owner (Direct)</u>	- Commercial an		ners' to see all opt		UAT Supplier 1.1	01/15/2020	Expired
		Others	- Commercial and	d Hou 🔻	P and C Contract Admin 1	CW7195	UAT Supplier 1.1	01/12/2023	Draft Amendment

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**.'

Project Type: Contract Workspace (Procu				
Welcome to the new Search page. Watch the				Permissions
janitorial Supplier [select] Contract ID Owner (select a value) [select]	© ⊕ Clicking on the 'Options' link this screenshot) in the upper of the 'Search Screen' will dis drop-down list of user-related to further refine the search.	he ' Options ' link (hidden in ot) in the upper-right corner h Screen ' will display a tt of user-related parameters		Contracts I can view Contracts I own or can manage Contracts I directly own Contracts I am a team member of Fields
Search Result		2 contract(s) found	Re	Others Advanced
Title † Janitorial Services - Capital Janitorial	Owner Classroom trainining 03	Contract ID CW8526	Supplier Capital Janitorial Services	Ignore Max Results Limit Search only in my language
Janitorial Services - Murrco - JSTraining		CW8886	Murrco Supply	Include Message Board in Free-Text Search ✓ Hierarchical Search ✓ Hierarchical Search Includes Parents

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

HOME	SOURCING	CONTRACTS	SUPPLIERS	Recent v	Manage 🗸
Contract W	/orkspace (Procurer	nent) 🗸 Search u	sing Title, ID, or any other term		√ (\$\overline\$)
					~~

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

	Search Filter] [Enter common search criteria	Options+
	Search using Title, ID, or any other term	()	and click 'Save Search.'	
(Expiration Date This Month	From: 02/01/2024 To: 02/29/2020	•••	
				Reset Save Search Search

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.

	Enter a name for the 'Saved Search' and click 'OK.'
Search Name: *	
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 X Is Contract Request = false
	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!	Click the 'Manage Saved Searches' link for further	×
Search Filter	information on previously saved searches.	Options
Search using Title, ID, or any other term (i)	•	J
Expiration Date This Month From: 02/01/2020 To: 02/	29/2020 ④ 🕞 💬	
	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 View, rename, or delete a search that you have saved. Project Saved Searches	Click the radio button and then 'Rename' or 'Delete' to edit a 'Saved Search' if necessary.		Done
Name	Project Type	Owner	
C C Expiring This Month -	Contract Workspace (Procurement)	Classroom trainining 03	
C Rename Delete			
Document Saved Searches			Show Details
Name Docum	ent 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.'

