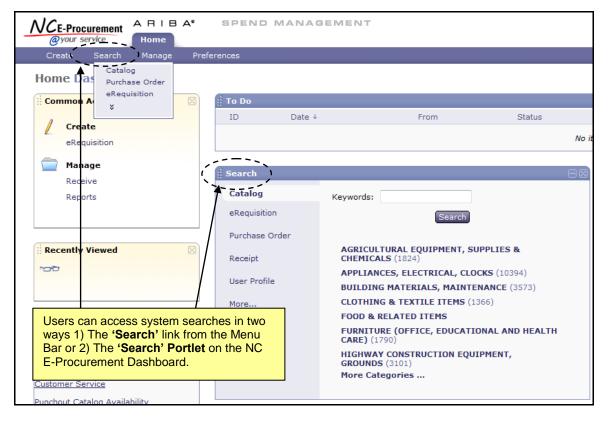


System Searches Process Guide

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.



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.

NCE-Procurement A	RIBA [®] SPEND MANAGEMENT		Home Help ▼ Logout
	lome		Welcome NCAS Requester
🕞 Create Search	Manage Preferences		-
Search	Type: eRequisition 👻	Users can enter as much or as little	
eRequisition	Change the search criteria or name, and then run the search	available information in the appropriate fields	
View All	Search Filters	to conduct the search.	Search Options
☞ My Labels			
Enter the eRequisition number in the 'ID' field to locate a specific eRequisition.	Title: ID: Commodity Code (any line item): (select a value) [select] Date Created: Entity: 41 [select]	Status: No Choir	auester [select] ce value) [select] To: USD arch] Reset] Save Search

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.



4. 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.

NCE-Procurement	Home Help ▼ Logout		
@your service Hor	ne		Welcome NCAS Requester
🕞 Create Search	Manage Recent Preferences		
Search	Type: eRequisition -		✓ Agency Specific Contract Approved By
eRequisition	Change the search criteria or name, and then run the search.		Approver
View All	Search Filters	Bid Number (any line item) Commodity Code (any line item) Date Approved	
 > My Labels No Items > My Saved Searches <u>Saved Search Title</u> > Public Saved Searches No Items 	Title: ID: Agency Specific Contract: Bid Number (any line item): Commodity Code (any line item): Date Created: No Choice ▼	Legacy Document Id: Requester: <u>N</u> Statewide Contract: (s Status: N	Date Approved Date Ordered Date Ordered Date Submitted Delay Purchase Until Description (any line item) Government Grant ID (any line item) Government Grant ID (any line item) AID Legacy Document Id Need-by Date (any line item)
			Non-Catalog Item (any line item) Order ID (any line item) Originating System Ref. ID Preparer Price (any line item) < Requester < Statewide Contract < Status < Supplier (any line item) < Title < Total Cost

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

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

Search Filters			Search Options
Title: ID: Bid Number (any line item): Commodity Code (any line item): Date Created:	(select a value) [<u>select</u>] (select a value) [<u>select</u>] No Choice v	Entity: Legacy Document Id: Requester: Status: Supplier (any line item): Total Cost:	41 [select] NCAS Requester [select] No Choice ↓ (select a value) [select] To: USD
			Search Reset Save 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.

- Home | Help * | Logout SPEND MANAGEMENT ARIBA* NC_{E-Procurement} Home @your service Welcome NCAS Requester Manage Recent 🔍 Search Type: eRequisition • Change the search criteria or name, and then run the search eRequisition Users can sort the search results View All Search Filters Search Options by clicking on the appropriate ✓ My Labels column header. No Items 41 [select] Title: Legac, Document Id: ▼ My Saved Searches ID: Reques NCAS Requester [select] Bid Number (any line item): Commodity Code (any line item): (select a value) [<u>select</u>] (select a value) [<u>select</u>] No Items Status: No Choice < Supplier (a line item): (select a value) [select Date Created: No Choice • All search Total Cost: To: USD results meeting Search Reset Save Search the criteria are displayed. Search Results Found 1 item Status (Date Created Total Type ID Title Composing Today, 5:00 PM \$0.00000 USD RQ20000948 Test eRequisition Label
 Copy Delete
- 6. To save this search for future use, click the 'Save Search' button.

- 7. Enter a search name in the 'Search Name' field.
- 8. Click '**OK'.**

Save Searc	ch	OK Cancel
Save the search by all users.	h to use again at a later time. If you have the required permission, you can save the search as a system searc	ch for use
Search Name: Search Category:	Saved Search Name	
Search Filters:	Entity = 41, Requester = NCAS Requester	



9. 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.

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

NCE-Procurement	HIBA" SPEND MANAGEMENT	ome Help ▼ Logout
	me	Welcome NCAS Requester
Create Search	Manage Recent Preferences	
Search	Type: eRequisition -	
eRequisition	Change the search criteria or name, and then run the search.	
		from My Dashboard
✓ My Labels	egin a new search.	
No Items	Entity: <u>41</u> Requester: <u>NCAS Requester</u>	
♥ My Saved Searches	Search	Refine Delete
Saved Search Title 🔨		· • • • • • • • • • • • • • • • • • • •
✓ Public Saved Searches	Search Results Found 1 item	
No Items	T Saved searches are listed here. Select th	ne ptal
	RQ20000948 T desired saved search and click the 'Search's saved search and click the 'Search's saved search and click the 'Search's saved search's saved search and click the 'Search's saved search's saved search and click the 'Search's saved search's saved s	h' 0.00000 USD
	Label Copy Delete button to execute a saved search.	

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.

: Search	
Catalog	ID:
eRequisition	Search
Purchase Order	My Saved Searches
Receipt	Search Title
User Profile	\
	Saved searches will only appear if the specific Type of search is selected.



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.'**

NCE-Procurement ARIBA*	SPEND MANA	AGEMENT	Home Help * Logout
@your service Home			Welcome NCAS Requester
Create Search Manage Re	cent Preferences		
Home Dashboard		Configur	e Tabs 👌 Refresh Content
Common Actions	<mark>∯ To Do</mark> ID Date ↓	From Status	t
Create eRequisition		No it Add New Ta	ons
Manage Receive	ii Search	Compare Ye	our Tabs to Default Settings Set to Default Settings
Reports	Catalog	ID:	Welcome to NC E-
	eRequisition	Search	Procurement
	Purchase Order	My Saved Searches	Version 2.0!
Recently Viewed	Receipt	Saved Search Title	Don't forget to visit the NCEP Home Page to find Job-Aids and
RQ20004904 Approval Flow	User Profile		Training Opportunities.
DODDOD 4002 Assessed Flam	Mara		

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

NCE-Procurement ARIBA*	SPEND MANA	GEMENT	Home Help ▼ Logout
@your service Home			Welcome NCAS Requester
Create Search Manage R	lecent Preferences		
Home Dashboard			e Tabs 👌 Refresh Content
Common Actions	To Do	Add C	ontent 🕄 🛛 🗋 🖂
A Country	ID Date↓		and Drag content items
Create eRequisition		No items	onto the dasbhoard.
			d Search
Manage	Search		
Receive Reports	Catalog	ID:	Welcome to NC E-
	eRequisition	Search	Procurement
	Purchase Order	My Saved Searches	Version 2.0!
Recently Viewed	Receipt	Saved Search Title	Don't forget to visit the NCEP Home Page to
RQ20004911 Ud Requisition			find Job-Aids and Training Opportunities.
RQ20004904 Approval Flow	User Profile		
RQ20004903 Approval Flow	More		
NC5000185-V2on to Receive			



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.

NCE-Procurement	ARIBA*	SPEND M	ANAGEMENT	Help `
@your service	Home		We	lcome NCAS Requeste
Configure Dashbo	ard Saved Search	Content		Cancel
Select a saved searc	ch that you created in	the NC E-Procuren	nent Service, to view the associated requests on your	×
SEARCHES	5			
Name 🗅		System Search	Search Category	
Saved Search Tit	le		eRequisition	Select
				Cancel

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.

NCE-Procurement ARIBA*	SPEND MANA	GEMENT			Home	e Help *	Logout
@your service Home					Wel	come NCAS R	lequester
Create Search Manage Red	cent Preferences						
Home Dashboard					Configure Tabs 🛛 🔾	Refresh C	Content
Common Actions	ii To Do				Add Content 🚦	Done	
Create	ID Date↓	From	Status	Title	Click and Drag co below onto the das		
eRequisition			No item	15	▼ Buyer		
Manage					Saved Search		
Receive Reports	Search Catalog eRequisition Purchase Order	ID:	Search Searches	Don't forget t	te to NC E- ement Versic o visit the NCEP Hom Training Opportunitie	e Page to fi	nd
RQ20004911 Ud Requisition	Receipt User Profile	N Contraction	earch Title	ii Saved Sea			Title
RQ20004904 Approval Flow RQ20004903 Approval Flow NC5000185-V2on to Receive	M The saved s	search		ID RQ20002510	Type Date Created	Ordered	
RQ20002983 Ud Requisition	now appear NC E-Procu	irement		<u>RQ20004888</u>	4/11/2012	Submitted	Ar Re
	Dashboard.			<u>RQ20001041</u>	2/28/2012	Ordered	Ur Re ₊
🖞 Purchasing Links 🛛 🗆 🛛				•	III		•