Step-by-Step Guide
Searching for POs within CU Marketplace

In This Guide

Purchase Orders (POs) can be located a few ways within CU Marketplace. The method to use depends on the amount of information you have to conduct your search…and the type of documents you want to view. Topics covered are:

- ✓ Locating your POs
- ✓ Locating POs using more than PO #
- ✓ Quickly locating POs and accompanying documents
- ✓ Locating POs using PO #
- ✓ Saving and exporting searches

Note for Shoppers: You can only see POs, and the accompanying documents, that resulted from a shopping cart you created.

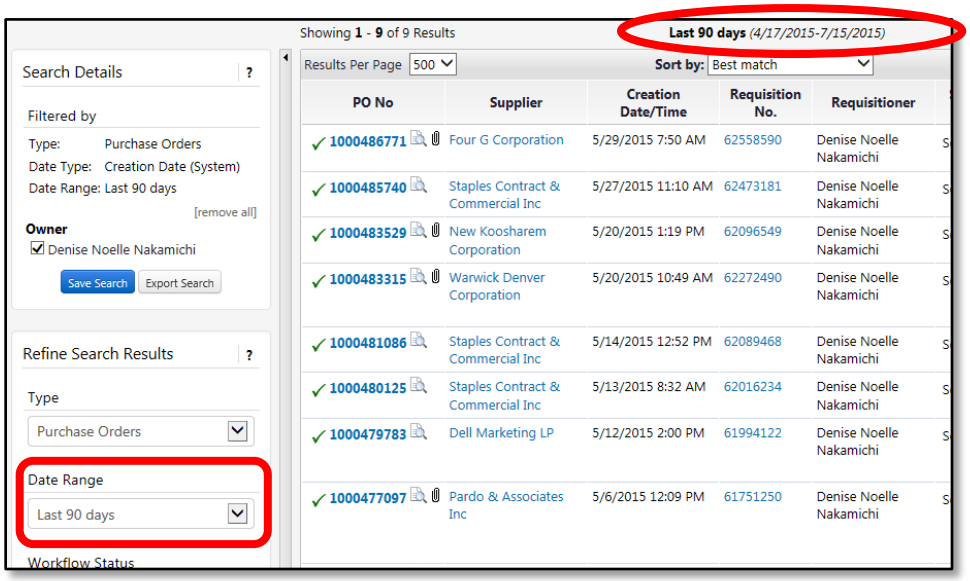
Procedure

Begin by accessing CU Marketplace via your campus portal. Within your portal's top navigation bar, use the **Business Tools** dropdown menu to select **CU Marketplace**.

If you want to view a list of your POs (for which you created the shopping carts)…

Use your left-side navigation bar to go to **Orders & Documents** > **Document Search** > **Search Documents**. Under the search area, click the **my purchase orders** link.

A list of your POs over the past 90 days appears.

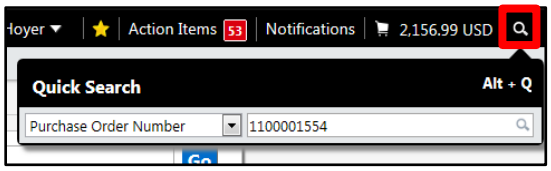


You can select a different **Date Range** (such as all dates, fiscal year-to-date, previous fiscal year-to-date, etc.) from the left side of your screen. You can also use the left side of your screen to refine your search by workflow status, supplier, Requestor (Prepared By), or other options.

If you want to find a specific PO and have the PO #…

Use the Quick Search located in the upper right corner of your screen:

- Click the Quick Search icon,
- Use the dropdown to select *Purchase Order Number*,
- Enter your PO #, and
- Click the **Search** button.



Your PO will appear.

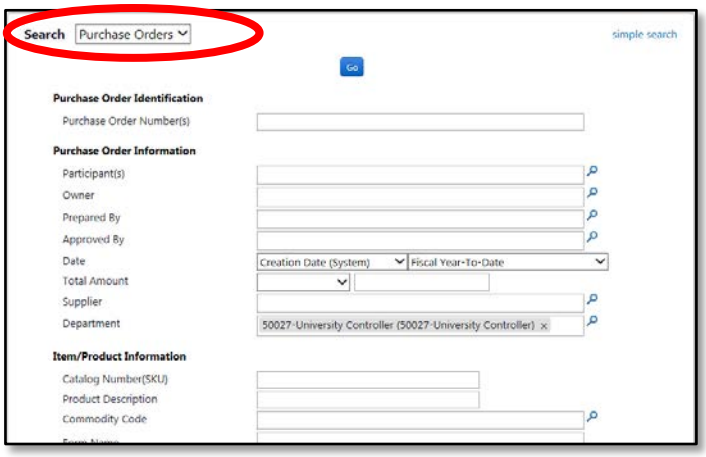
You can also use the Quick Search to locate any other documents related to the PO – such as the requisition, receipt, and invoice (voucher). Follow the above steps but use the dropdown to select *All* (instead of *Purchase Order Number*).

If you want to find POs using more than the PO #…

Using the advanced Document Search, you can find POs by more criteria than the PO #. For example, you can search by Requestor, or supplier, or HR department, or SpeedType. You can even search using multiple criteria simultaneously (such as by Requestor **and** by supplier).

Use your left-side navigation bar to go to **Orders & Documents** > **Document Search** > **Search Documents**. If the simple search appears, click the **advanced search** link.

Use the **Search** dropdown to select *Purchase Orders.* Enter your search criteria, and then click the **Go** button (located at the top or bottom of the page).

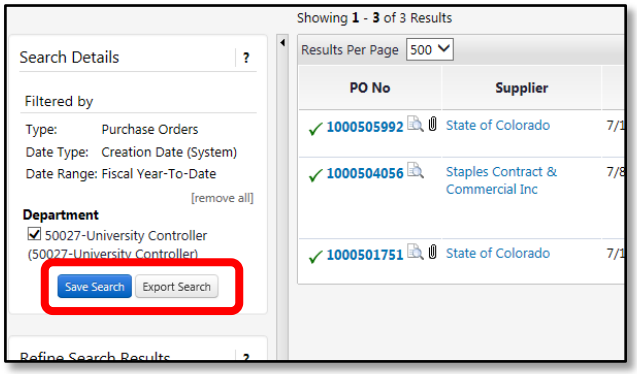


A list of results will appear. Use the left side of your screen to refine your search by options such as date range, supplier, user, or status.

You can edit your current search by clicking the **Back to Edit Search** link in the upper-left corner of your screen. Or, if needed, click the **Start New Search** link to begin a new search.

If you want to save your search…

Once you have a list of results, you can save the search for future use. Click the **Save Search** button located on the left side of your screen. You will be prompted to give a name and, if desired, a description of your saved search.



To access your saved searches: Use your side navigation bar to go to **Orders & Documents** > **Document Search** > **View Saved Searches**.

If you want to export your search…

Exporting a search allows you to manipulate your results data within Microsoft Excel. Click the **Export Results** button located on the left side of your screen. You will be prompted to give a name and, if desired, a description of your export. You will also select the **Export Type**:

- *Screen Export* provides the same information as your search results.
- *Transaction Export* provides the same information as your search results, and then some. This is the most common export type.
- *Full Export* provides all of the information available for your search results. Take caution when selecting this option due to the amount of data exported. Six separate files of data are generated with this selection.

You may receive an email notification when your export is ready.

To access your exported searches: Use your side navigation bar to go to **Orders & Documents** > **Document Search** > **Download Export Files**.