

# PURCHASE ORDER HISTORY SEARCH BY CUSTOM FIELD

Last Updated on: 11/8/2010

East Carolina UNIVERSITY Home/Shop

Charles Boulineau user settings | logout

2009-07-17 boulineauc 01 | 0 item(s), 0.00 USD

Search for PR No. Go

home/shop favorites carts approvals history receiving more >>

shop Admin inventory

Shop Everything Go advanced search

Go to: Favorites | Forms | CATALOG FORM | Quick Order Browse: Suppliers | Categories | Chemicals

Action Items

- My Orders
- No current nor recently completed orders
- + View Approvals
- + View Administrative Items \*

Additional Purchasing Links

Click Here for [State Spending Restrictions](#)

Trouble finding Vendor Names "click here" for the more common list of hard to find vendor names.

Purchasing ADOBE software "click here" for a listing of current contract pricing.

State Term Contracts "click here" for an alphabetical listing of current state contracts.

Click Here for [PORT Training Manual](#)

For more information or update message

Welcome to the ECU PORT Marketplace display order | add supplier

 Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 State Contract 898A	 Contract Vendor
 Non- Contract Vendor	 State Contract 350A	 Contract Vendor	 State Contract 207A	 Maintenance Supplies	 Office Supplies
 Medical Supplies	 Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor
 Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor	 Non- Contract Vendor
 Non- Contract Vendor	 Contract Vendor	 Non- Contract Vendor	 Contract Vendor		

My Resources

Product Release Library System Message email: port@ecu.edu phone: +1 (252) 328-6434

1.

1. Click on the **History** tab.

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The screenshot shows the 'Purchase Order Search' page on the East Carolina University website. The page has a purple header with the university logo and user information. Below the header is a navigation bar with tabs for 'home/shop', 'favorites', 'forms', 'carts/requisitions', 'approvals', 'history', 'settlement', and 'more >>'. The 'history' tab is active, and the 'PO History' sub-tab is selected. The main content area is titled 'Purchase Order Search' and contains several sections:

- Search Criteria:** A row of tabs: 'by PO No.', 'by Requisition', 'by Supplier/SKU', 'by Receipt', 'by Invoice', and 'by Contract'. The 'by PO No.' tab is selected.
- Search Input:** A text box for 'Purchase Order No.' with a search button and a 'Request Export' button.
- Filters:** A section with a 'Filter' checkbox (checked), 'Results per page' set to 100, and a 'Search' button.
- PO Date Filters:** A section with radio buttons for 'My Orders' (selected) and 'My Approved Orders'. It includes 'Creation Date (System)' dropdown, 'Start Date' (7/01/2010), and 'End Date' (11/08/2010).
- Custom Field Filter:** A section with various fields: 'Account' (72110), 'Activity', 'Fund' (111170), 'NC Preference', 'Organization' (230601), 'Pricing Method', 'Program', 'Special Instructions' (None), and 'Work Order #'. Each field has a 'Select from profile values...' or 'Select from all values...' link.

Numbered callouts (2-6) point to the following elements:

- 2. 'PO History' and 'by PO No.' tabs.
- 3. 'Filter' checkbox.
- 4. 'My Orders' radio button, 'Start Date', and 'End Date' fields.
- 5. 'Account', 'Fund', 'Organization', 'Special Instructions', and 'Work Order #' fields.
- 6. 'Search' button.

2. Ensure that the **PO History** and **by PO No.** tabs are selected.
3. Select the **Filter** check box.
4. Select **My Orders** and enter desired **Start Date** and **End Date** for the purchase orders.
5. Enter appropriate values for custom fields to find desired purchase orders with selected criteria. In this example, we will search **My Orders** for **7/1/2010 to 11/8/2010** with the following custom fields: **Fund** = 111170, **Organization** = 230601, **Account** = 72110, and **Special Instructions** = None. **Note:** You can search FOAPA values from your profile by clicking on **Select from profile values...** or you can search all values by clicking on **Select from all values...** **Important Note:** When searching purchase orders by Fund, Organization, Account, Program, and Activity, you must enter all digits for the respective FOAPA elements. Otherwise, no results will be returned.
6. Click on the **Search** button.

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The screenshot shows the 'Purchase Order Search' interface. A warning dialog box is displayed in the center, stating: 'Warning! The search criteria entered is likely going to yield a large number of results. It is recommended that you either request an export of search results, or cancel this search and modify the criteria as described below. You received this message because: The date range entered is greater than 90 days. It is recommended that you cancel the search and reduce the range to be 90 or fewer days. Run multiple queries if required.' The dialog box has 'Search', 'Request Export', and 'Cancel' buttons. Below the dialog box, the 'Custom Field Filter' section is visible, with fields for Account (72110), Activity, Fund (111170), NC Preference, Organization (230601), Pricing Method, Program, and Special Instructions (Direct Payment).

7.

7. Click the **Search** button.

The screenshot shows the search results table. The table has columns: Workflow Status, PO No., Supplier, Creation Date/Time, PO Total, Requisition No., Requisitioner, Supplier Status, Settlement Status, and Select. The results are as follows:

Workflow Status	PO No.	Supplier	Creation Date/Time	PO Total	Requisition No.	Requisitioner	Supplier Status	Settlement Status	Select
✓	P1089144	Dell Marketing LP	11/2/2010 5:51 AM	2,900.00 USD	465502	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001014-TEST	ECU Central Stores & Receiving (Maintenance Orders)	10/29/2010 11:31 AM	5,000.00 USD	464412	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001008-TEST	ECU Medical Storeroom	10/29/2010 11:18 AM	70.44 USD	464388	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001007-TEST	ECU Central Supply (Office Supplies)	10/29/2010 11:15 AM	1,594.69 USD	464400	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001006-TEST	ECU Central Supply (Office Supplies)	10/29/2010 11:14 AM	1,594.69 USD	464379	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001004-TEST	ECU Central Supply (Office Supplies)	10/29/2010 11:12 AM	1,594.69 USD	464381	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	EC001000-TEST	ECU Central Stores & Receiving (Maintenance Orders)	10/29/2010 11:04 AM	242.20 USD	464352	Boulineau, Charles	Sent	No Matches	<input type="checkbox"/>
✓	P1089137	Alpha Engineering and Environmental	10/29/2010 9:30 AM	1,875.35 USD	464300	Boulineau, Charles	Sent	Fully Received No Matches	<input type="checkbox"/>
✓	P1089135	CDWG LLC	10/29/2010 9:16 AM	2,384.31 USD	464280	Boulineau, Charles	Sent	Fully Received No Matches	<input type="checkbox"/>
✓	P1089133	Express Travel	10/29/2010 6:48 AM	2,709.90 USD	464245	Boulineau, Charles	Sent	Partially Received No Matches	<input type="checkbox"/>

8.

8. Click on the **Purchase Order #**.

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**10.** East Carolina University logo

**9.** Navigation tabs: Status, Purchase Order, Revisions, PO Approvals, Receipts, Comments, History

**PO/Reference No.** P1089135 **Revision 0**  
**Supplier** CDWG LLC

**General Information**

PO/Reference No.	P1089135
Revision No.	0
Supplier Name	CDWG LLC
Purchase Order Date	10/29/2010
Total	2,384.31
Requisition Number	164280
Requester Name	Charles Boulineau
Requestor Email	boulineauc@ecu.edu
Requestor Phone	+1 (919) 328-1924

**Document Status**

Workflow: **Completed** (10/29/2010 9:17 AM)  
Distribution: The system distributed the purchase order using the method(s) indicated below the last time it was distributed:  
Email (HTML Body): boulineauc@mail.ecu.edu  
Manual  
Distribution Date/Time: 10/29/2010 9:17 AM  
Supplier: Sent To Supplier

**Line Item Status**

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Receiving	Invoicing	Matching
HP LaserJet 2015	na	EA	269.00	4 EA	1,076.00 USD	Fully Received	none	No Matches
2 Olympus 7.0 Megapixel Camera	na	EA	375.98	2 EA	751.96 USD	Fully Received	none	No Matches
3 8 GB Sandisk Micro SD card	na	EA	48.95	8 EA	391.60 USD	Fully Received	none	No Matches
4 4 GB Flash Drives	na	EA	32.95	5 EA	164.75 USD	Fully Received	none	No Matches

Subtotal: 2,384.31  
Shipping: 0.00  
Handling: 0.00  
Total: 2,384.31 USD

- 9. From here you can review the purchase order **Status**, **Purchase Order**, **Revisions**, **PO Approvals**, **Receipts**, **Comments**, and **History**.
- 10. This completes the steps for this procedure. Click on the **East Carolina University** icon to return to the home page.