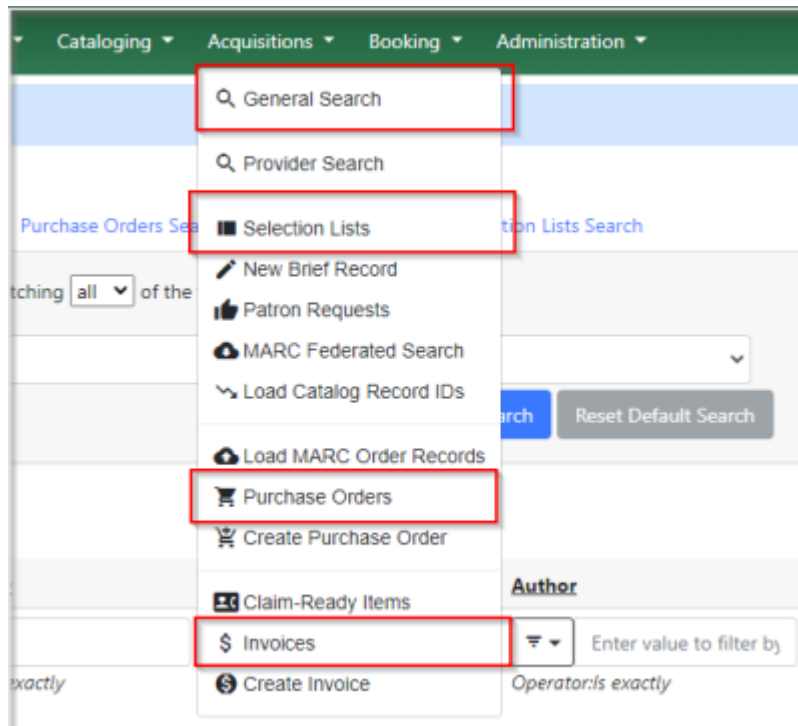# Acquisitions Search

Search Menu

There are several different ways to access the Search screen for Acquisitions.

Clicking any of these options will take you to the same Search screen, but just on a different tab.

Search Options

Default Searches

Each of the search tabs has a configured default search. For each:

- Line items – [blank] [is] _
- Purchase orders – Purchase orders at your workstation's org unit that are open
- Invoices – Invoices at your workstation's org unit that are open
- Selection lists – Selection lists owned by you

However, you can also set your own default search terms. These are individual to each tab, so you can have a specific default search term for line items, but still use the default search set for purchase orders.

By setting a default search, those search terms will automatically be populated whenever you open that search tab.

> It is recommended to set a default search for each tab, even if you choose to only include your normal ordering agency. That way you won't have to reset it every time.

To set a default search:

- From within your chosen search tab (Line Items/Purchase Orders/Invoices/Selection List), select your default search terms.
- Click the blue **Set as Default [X] Search** button.

These search terms will persist each time that you open this search tab.

If you would like to get rid of your default search, you can click the gray **Reset Default Search** button. This will reset your default search terms to the configured defaults.

> You do not need to hit the **Reset Default Search** button every time you do a new search. This is only to be used to discard default search terms.

Retrieve Results Immediately

The **Retrieve Results Immediately** ticky box can be used in conjunction with the Set as Default Search button to automatically retrieve the results of a search anytime you open that search tab.

Like the **Set Default Search** button, it operates independently on each type of search. So you could have Retrieve Results Immediately set on the Purchase Orders search, but not on the Invoices search.
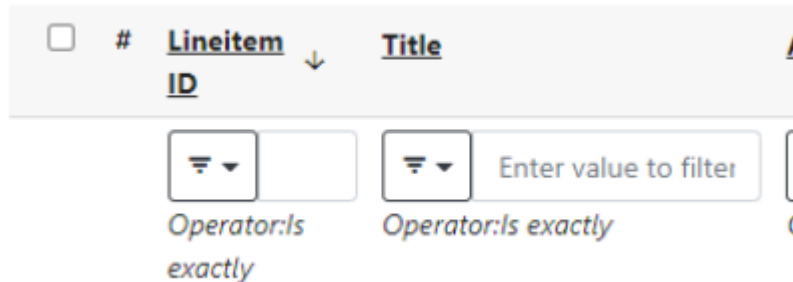
> Using the Retrieve Results Immediately ticky box requires you to set a Default Search first.

Search Terms

Inline Filters and Sorting

All of the column headers are now sortable. To sort a particular column, click on the column header. You'll see the up/down arrow appear next to the header.

You can click the header again to sort in the opposite direction (ascending or descending).

Columns and Grid Settings

See: **admin:workstations:columns**

Legacy Search Interface

With the move to the new interfaces in version 3.6 (PINES January 2021 upgrade), the legacy interface is still available. There are a few functions available in the legacy interface that are not available in the new interface, so the old one has been retained.

If you don't get the search results that you think you should, you can still use the legacy interface to replicate your search.

Additionally, tasks you will need to use the legacy interface for:

- Receiving line items via Search
- Cancelling / marking line items backordered via Search

Search Terms

> It is recommended to set a Default Search that includes, at bare minimum, your preferred ordering agency. Since it defaults to your workstation (probably a branch), you will want to change that to your normal ordering agency.

Each of the types of search have search terms that you can use. You'll see in the first drop-down box the available search terms, divided into different sections.
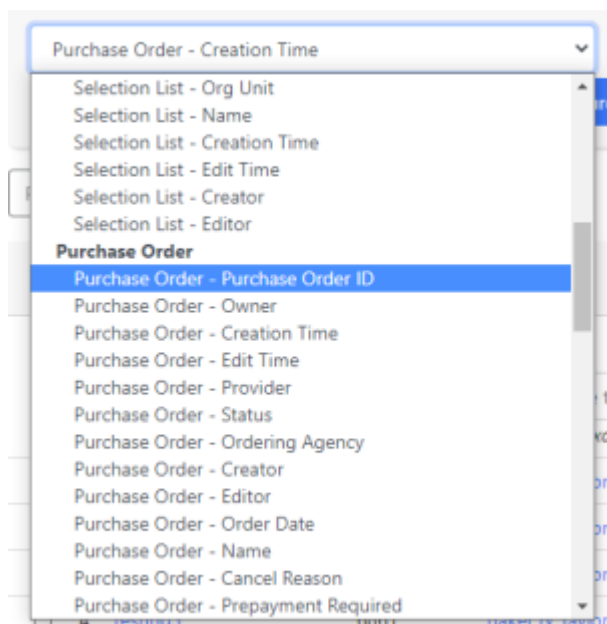
Most search terms are fairly self-explanatory, but there are a few nuanced ones to be aware of:

- **Purchase Order - Owner** - This is the **user** who uploaded the purchase order
- **Purchase Order - Creation Time** - The date/time that the purchase order was created in the system
- **Purchase Order - Edit Time** - The last time the purchase order was edited. This stops being tracked once the PO is put on-order
- **Purchase Order - Ordering Agency** - Your purchasing agency, usually your system
- **Purchase Order - Order Date** - The date/time that you placed this PO on-order
- **Invoice - Receiver** - This is the same thing as ordering agency is for purchase orders. It should be set to your system (or PO ordering agency).
- **Invoice - Vendor Invoice ID** - This is the invoice ID on your printed invoice from the vendor. It's different than Invoice - Internal Invoice ID which is the database number of the invoice, and you'll probably never use.

Common Searches

Line Items

While receiving is not currently supported in the 3.6 version of the Acquisitions Search, it can be helpful to find line items to see their status if you don't know the specific purchase order they're on, or don't want to load up the entire purchase order.

If you tend to use one type of search here, it might be good to set up the search terms and then do "Set as Default Search." You probably don't want to do Retrieve Results Immediately on this search type, because your values are going to change every time.

Some searches might look like:

Line Item Attribute-Title of Work [contains] _

Line Item Attribute-ISBN [contains] _

> When doing line item attribute searches, "contains" is almost always the best option. Using "is" means it has to be exactly right, and since there can be variances in how things are in the various vendor records, "contains" is a safer choice.

> If you encounter any issues finding something that you know you have in hand/that you've ordered, add Purchase Order-Ordering Agency [is] as one of your search terms here. That usually fixes the issue.

Purchase Orders

Often when you're uploading purchase orders, often the easiest way to find them is to search for purchase orders created that day. To search this way, your search terms would look like:

Purchase Order-Ordering Agency [is] _
Purchase Order-Creation Time [is] [today]

> Don't set up a search like this as your default search or use Retrieve Results Immediately. Because you've put in a specific date, every time the search runs it will search for that specific date. This search is good for just setting up a search ad hoc.

If you wanted to set that as a search to run automatically when you open Purchase Orders Search (i.e. tick the Retrieve Results Immediately checkbox), set up your search terms like this:

Purchase Order-Ordering Agency [is] _
Purchase Order-Creation Time [age (relative date)] 8 hours

Setting up the search with a relative date and using the Retrieve Results Immediately checkbox means that anytime you open the purchase order search page this search will auto-run. If that's the most common way that you tend to search, this might be a good option. If you're searching for something specific that's not this, you can always change the search terms to look for something else.

Invoices

Invoices, like purchase orders, are a search that you always enter your ordering agency on. So this might be a good interface to set up a Default Search, even if you choose not to do Retrieve Results Immediately. A useful default search might be:

Invoice-Receiver [is] _
Invoice-Close Date [does NOT exist]

A search set up like this will retrieve any open invoices (not closed) for your ordering agency. This is a good candidate for setting up a Retrieve Results Immediately search, but that's entirely personal preference. If you consistently do this search, it might be useful. As with purchase orders, you can always change the search terms if you're looking for something specific.

Selection Lists

Not used by PINES.

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