

Searching

The Acquisitions module has a powerful searching interface that enables you to search for line items, catalog records, selection lists, purchase orders and invoices. Searching for line items and catalog records can help ensure that duplicate orders are not placed.

Using the General Search

The option chosen in the *Search for* box determines the type of search results returned. The possible options are: line items, line items and catalog records, selection lists, purchase orders, and invoices.

Search fields are divided into a number of categories. These categories are:

- Line Item
- Selection List
- Purchase Order
- Invoice
- Line Item Detail
- Line Item Attribute

Unless grayed out, these fields can be used with any of the *Search for* options.

The example below illustrates searching for invoices using the ordering agency of a purchase order.

Acquisitions Search

Search for matching of the following terms:

is

Add Search Term

Search

Refresh Grid Print Selected Invoices

[Back](#) [Next](#) [Filter](#)

✓	#	Vendor Invoice ID	Receiver	Provider	Shipper	Complete	Invoice Date
<input type="checkbox"/>	1	222	STATELIB	MWT	MWT	True	6/13/14 12:00 AM
<input type="checkbox"/>	2	234	STATELIB	MWT	MWT	True	6/16/14 12:00 AM
<input type="checkbox"/>	3	23	STATELIB	Midwestft	Midwestft	False	6/18/14 12:00 AM
<input type="checkbox"/>	4	221	STATELIB	Midwestft	Midwestft	True	6/23/14 12:00 AM
<input type="checkbox"/>	5	221	STATELIB	TV1	TV1	False	6/23/14 12:00 AM

General Search Tips

- The *Search for* option you choose will be the form in which your results are returned
- Search terms are ANDed together when *all* is selected
- Search terms are ORed together when *any* is selected
- Click *Add Search Term* to add more rows for additional fields
- Search fields from any category can be used in a search unless the search fields are grayed out in the list
- Click the red X at the end of a row to delete the row of search terms
- Use “contains” when doing keyword searching, such as for the title of a work
- Use “is” when searching for an exact match, such as for an ISBN

Searching for Line Items

A Line Item (LI) search will retrieve a list of line items based on the search terms used. See [General Search Tips](#) above.

1. To access the searching interface, select *Acquisitions*→*General Search*.
2. Choose *line items* from the *Search for* drop down menu.

The screenshot shows the 'Acquisitions Search' interface. The 'Search for' dropdown menu is open, displaying a list of options: 'line items' (highlighted), 'line items & catalog records', 'selection lists', 'purchase orders', and 'invoices'. To the right of the dropdown, the text 'matching all of the following terms:' is visible, followed by a dropdown menu showing 'is' and an empty text input field. Below the dropdown menu is a 'Search' button.

3. Refine your search by selecting the specific fields you would like to search. Some search terms may be disabled depending on the *Search for* option you chose.

The screenshot shows the 'Acquisitions Search' interface. The 'Search for' dropdown menu is set to 'invoices'. To the right, the text 'matching all of the following terms:' is visible, followed by a dropdown menu showing 'is' and an empty text input field. Below this is a 'Select Search Field' dropdown menu and a red 'X' button. At the bottom, the 'Add Search Term' button is highlighted with a blue dashed border, and a 'Search' button is located below it.

4. Once you have added your search term(s), click *Search* or press the **ENTER** key. Results meeting your

search criteria will display.

5. If you wish to edit your search, click *Reveal Search Form* in the top right corner of the results screen to display your search.

Searching for Line Items & Catalog Records

Best practice is to search for an item before adding it to a selection list or purchase order. A search for Line Items & Catalog Records searches all records in the catalog as well as all line items. This helps to ensure that duplicate orders are not placed for items that your library already owns or is in the process of ordering.

There are five *Line Item Attribute* (LIA) search fields you can use when searching for line items and catalog records. They are:

1. LIA - Title of Work: Use with the connecting word of “contains” to keyword search for a line item or catalog record with a particular title.
2. LIA-Author of Work: Use with the connecting word of “contains” to keyword search for line items or catalog records by a particular author
3. LIA-ISBN: Use with the connecting word “is” to search for a line item or catalog record with a specific ISBN
4. LIA-ISSN: Use with the connecting word “is” to search for a line item or catalog record with a specific ISSN
5. LIA-UPC: Use with the connecting word “is” to search for a line item or catalog record with a specific UPC. All other search fields will display as grayed out.

To begin an Acquisitions search, access the General Search interface through the Acquisitions menu or the Acquisitions toolbar.

1. Choose *line items & catalog records* (LIA) from the *Search for* drop down menu.

Acquisitions Search

Search for selection lists matching all of the following terms:

LI - Create line items & catalog records

Add Search
is

selection lists
purchase orders
invoices

Search

2. Select your search field(s) and enter your search term(s).
3. Click *Search for* or press the Enter key.
4. The line items and/or catalog records that meet your search criteria will display.

Acquisitions Search Hide Search Form

Search for line items matching all of the following terms:

LIA - ISBN contains 0679805273 X

Add Search Term

Search

« Prev 1 — 8 Next »

--Actions--

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
Oh, the places you'll go! / by Dr. Seuss. Seuss, 0679805273 c1990. Random House,	Expand	Copies(2)	Notes(0)	-- Actions --	Pending-Order	0.05
# 7437 0 link to catalog worksheet M 277 requests view invoice(s) @ B&Tt						
Oh, the places you'll go! / by Dr. Seuss. Seuss, 0679805273 c1990. Random House,	Expand	Copies(2)	Notes(0)	-- Actions --	Pending-Order	0.05
Order Identifier ISBN 0679805273						

Line Item/Catalog Record Search Tips

- When searching for line items & catalog records, the best search fields to use are Title of Work and the number field associated with the item (ISBN, ISSN, UPC).
- If the search is set to match *any* of the following terms, the results will include items that match either the title, the number, or both.

Acquisitions Search

Search for matching of the following terms:

<input type="text" value="LIA - ISBN"/>	<input type="text" value="contains"/>	<input type="text" value="0679805273"/>
<input type="text" value="LIA - Title of work"/>	<input type="text" value="contains"/>	<input type="text" value="places you'll go"/>

Searching for Selection Lists

My Selection Lists (SL) search displays only the selection lists created by the user currently logged on to the workstation. You can view selection lists created by other users using the *General Search*.

1. To access the searching interface, select *Acquisitions*→*General Search*.
2. Choose *selection lists* (SL) from the *Search for* drop down menu.

Acquisitions Search

Search for matching of the following terms:

Select

Add

3. Select your search field(s) and enter your search term(s).
4. Click *Search* or press the Enter key.

Acquisitions Search

Search for matching of the following terms:

<input type="text" value="SL - Org Unit"/>	<input type="text" value="is"/>	<input type="text" value="STATELIB"/>
--	---------------------------------	---------------------------------------

5. The selection lists meeting your search criteria will display in a grid.

Acquisitions Search							Reveal Search Form
<input type="button" value="Refresh Grid"/> <input type="button" value="New Selection List"/> <input type="button" value="Clone Selected"/> <input type="button" value="Merge Selected"/> <input type="button" value="Delete Selected"/>							
Back Next Filter							
✓	#	Name	Owner	Creation Time	Edit Time	Org Unit	Entry Count
<input type="checkbox"/>	1	MVTast	thequeenofcuisine	1/29/15 1:46 PM	1/29/15 1:46 PM	CRLS-DAWSN	13
<input type="checkbox"/>	2	2015-02-06mw	thequeenofcuisine	2/6/15 11:46 AM	2/6/15 11:46 AM	CRLS-DAWSN	15
<input type="checkbox"/>	3	adult_dvd_1-16-15	thequeenofcuisine	2/11/15 3:41 PM	2/11/15 3:41 PM	CRLS-DAWSN	8
<input type="checkbox"/>	4	adult_audio_1-16-2015	thequeenofcuisine	2/11/15 3:42 PM	2/11/15 3:42 PM	CRLS-DAWSN	33
<input type="checkbox"/>	5	3/4_adult_audio	thequeenofcuisine	3/4/15 8:42 AM	3/4/15 8:42 AM	CRLS-DAWSN	0
<input type="checkbox"/>	6	adult_dvd_3-4-15	thequeenofcuisine	3/4/15 9:04 AM	3/4/15 9:04 AM	CRLS-DAWSN	7
<input type="checkbox"/>	7	2015-03-10 A AUDIO	thequeenofcuisine	3/10/15 8:32 AM	3/10/15 8:32 AM	CRLS-DAWSN	21

Selection List Search Tips

When searching for selection lists (SL) created by a particular user, the best search fields are:

- SL-Owner: Searches based on the owning user
- SL-Creator: Searches based on the creating user

When searching for a particular selection list, the best search field is:

- SL-Name: Searches for the name of a particular selection list

Searching for Purchase Orders

The default purchase order search allows you to generate a list of on-order purchase orders created by your ordering agency. This search can also be modified to search for purchase orders (PO) using different parameters.

1. To access the searching interface, select *Acquisitions*→*Purchase Orders*.
2. By default, the search interface is set to search for on-order purchase orders created by the workstation the user is logged in from. If your ordering agency is different, you will need to change this field. If this is the search you wish to perform, click *Search*.

Acquisitions Search

Search for matching of the following terms:

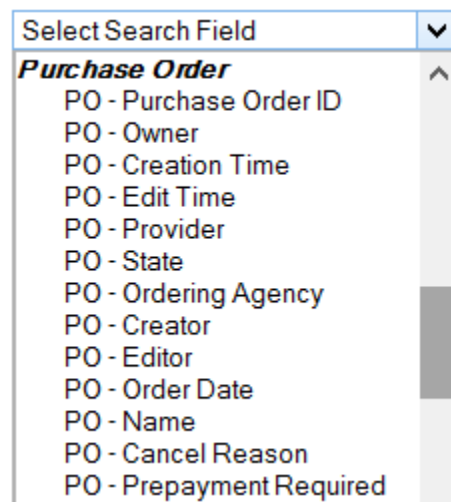
is

is

STATELIB
STATELIB-B
STATELIB-L

Purchase Order Search Tips

- To search for purchase orders with a status other than “on order,” simply replace *on order* with the status you wish to search.
- By default, the *PO-Ordering Agency* is the workstation the user is logged in at. Multi-branch systems with centralized ordering will need to update this to the location that is their actual ordering agency.
- Use the *Purchase Order* search fields to modify your search as needed.



- Search fields that are not grayed out in the categories of *Line Item*, *Selection List*, *Invoice*, and *Line Item Attribute* may also be used to build a search.

Searching for Invoices

The default invoice search allows you to generate a list of *open* invoices for your ordering agency. This search can also easily be modified to search for invoices using different parameters.

1. To access the searching interface, select *Acquisitions*→*Open Invoices* or select the Invoices button from the Acquisitions toolbar.
2. By default the search interface is set to search for open invoices created by your ordering agency. If this is the search you wish to perform, click *Search*.

Acquisitions Search

Search for matching of the following terms:



Add Search Term

Search

Invoice Search Tips

- To search for closed invoices, simply uncheck the box adjacent to the *I-Complete* search field.
- By default the *I-Receiver* is the workstation the user is logged in at. Multi-branch systems with centralized ordering will need to update this to the location that is their actual receiver.
- Search fields in the categories of *Line Item*, *Selection List*, *Purchase Order*, and *Line Item Attribute* may also be used to build a search.

Select Search Field	
Invoice	^
I - Internal Invoice ID	
I - Receiver	
I - Provider	
I - Shipper	
I - Invoice Date	
I - Receive Method	
I - Invoice Type	
I - Vendor Invoice ID	
I - Payment Auth	
I - Payment Method	
I - Note	
I - Complete	

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=acq:searching&rev=1513354951>

Last update: **2018/10/11 20:15**

