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.
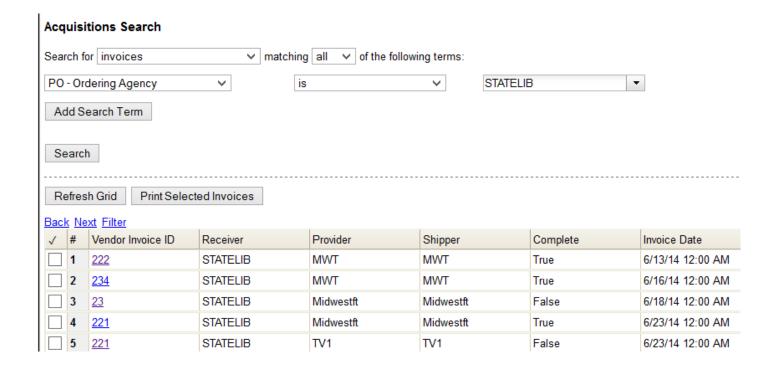
Using the General Search

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.

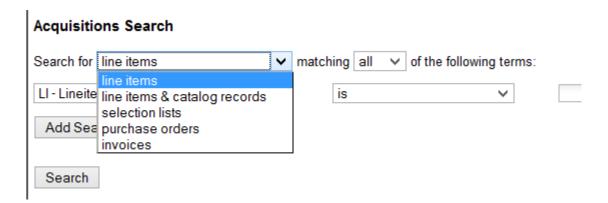The example below illustrates searching for invoices using the ordering agency of a purchase order.

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*.

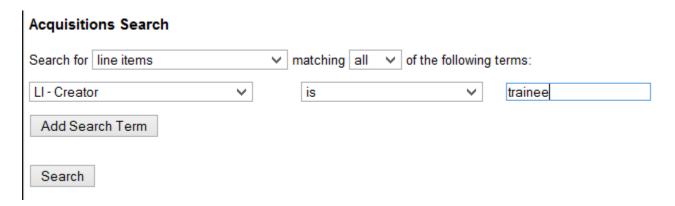2. Choose *line items* from the *Search for* drop down menu.

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.

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

search criteria will display.

Acquisitions Search

Search for [line items ▾] matching [all ▾] of the following terms:

[LI - Creator ▾] [is ▾] [trainee]

[Add Search Term]

[Search]

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.

Acquisitions Search   [Reveal Search Form]

[Refresh Grid] [New Selection List ▾] [Clone Selected ▾] [Merge Selected ▾] [Delete Selected]

Back Next Filter

✓	#	Name	Owner	Creation Time	Edit Time	Org Unit	Entry Count
☐	1	AddABriefRecordList	gplsacqadmin	4/1/14 11:47 AM	4/1/14 12:11 PM	STATELIB-I	3

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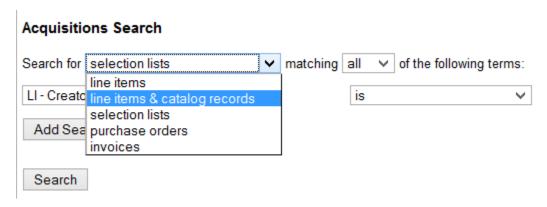
There are five *Line Item Attribute* (LIA) search fields you can use when searching for line items and catalog records. They are:

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.

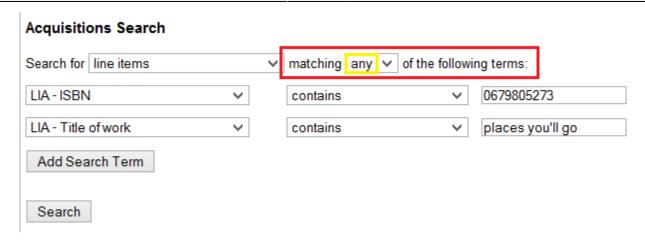1. Choose *line items & catalog records* (LIA) from the *Search for* drop down menu.

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.

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.
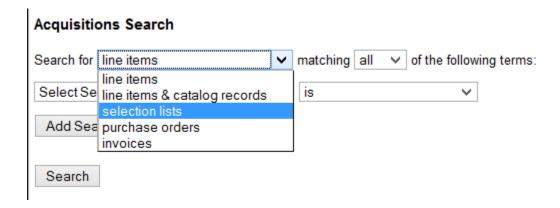
Searching for Selection Lists

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.

3. Select your search field(s) and enter your search term(s).

4. Click *Search* or press the Enter key.

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

Selection List Search Tips

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

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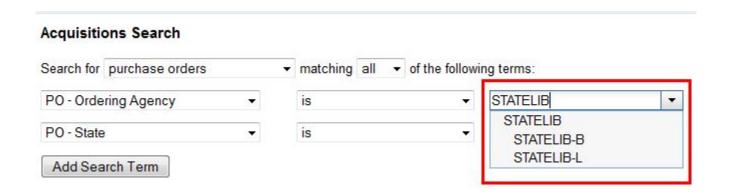- SL-Creator: Searches based on the creating user

When searching for a <u>particular selection list</u>, the best search field is:

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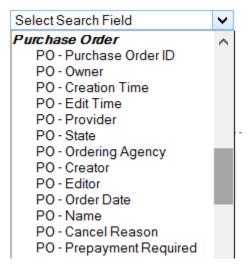
Searching for Purchase Orders

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*.

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.
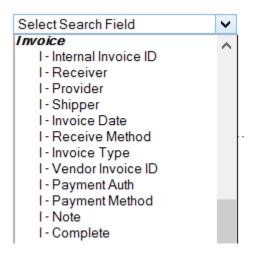
1. To access the searching interface, select *Acquisitions→Open Invoices* or select the Invoices button from the Acquisitions toolbar.

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 [invoices ▾] matching [all ▾] of the following terms:

[I - Complete ▾] [is ▾] ☑

[I - Receiver ▾] [is ▾] [STATELIB ▾]

[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