



eShop How-To Sheets

Searching Documents

This how-to sheet outlines the steps required to:

- Track and search documents within eShop. There are several ways to find documents, such as requisitions, purchase orders, goods receipts and invoices.

From Cart to Requisition

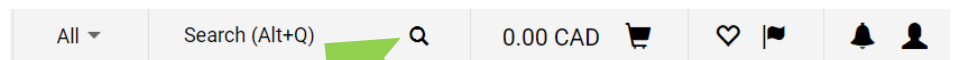
- Once you submit a cart in eShop it is called a requisition. Once the requisition moves through approvals, it becomes a purchase order which is sent to the vendor.

LET'S GET STARTED ...

- You have already signed into your eShop account.

QUICK SEARCH

- If you know the document number, enter it in the 'Search (Alt+Q)' field at the top of the screen and click enter on your keyboard.



DOCUMENT SEARCH

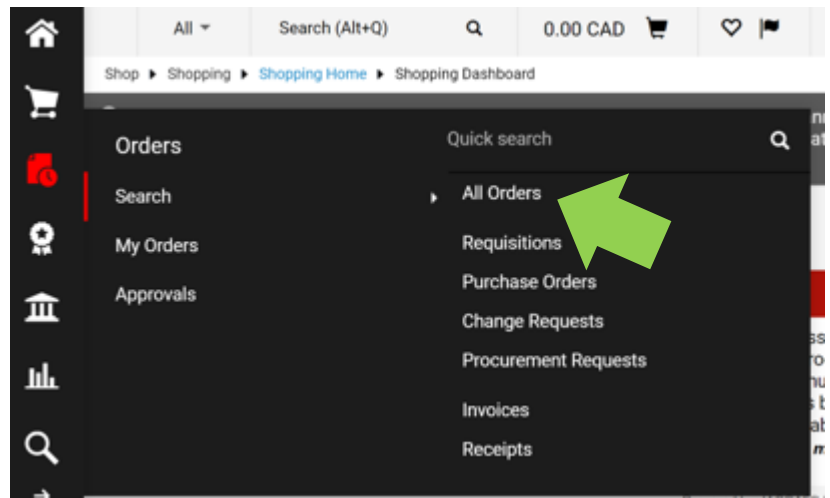
- If you don't know the document number, the order search allows you to search through all of your eShop documents.

- Click on the 'Order Search' icon.



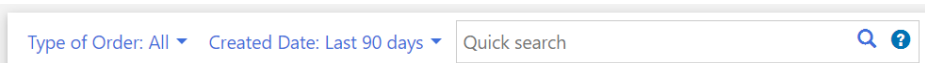
5. From this menu, you can
- Choose 'All Orders', or
 - choose the type of document you are searching for (e.g. 'Purchase Orders').

In this example, I will choose 'All Orders'.



6. This search window will appear.

The default options will return all of documents for the last 90 days.



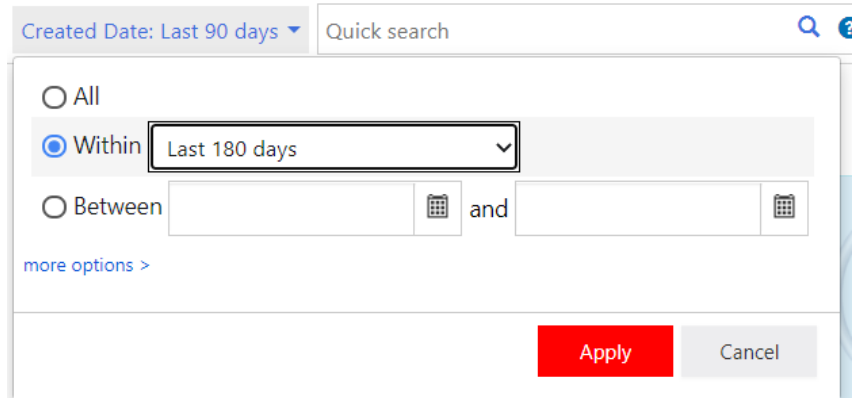
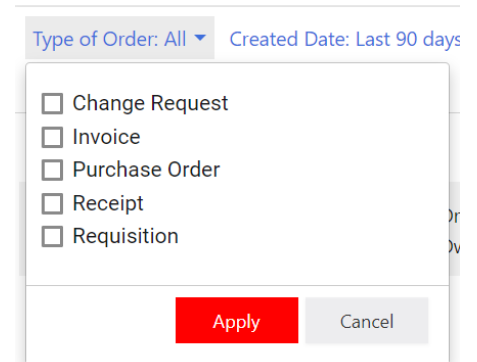
7. Use the drop down options to refine your search.

- 'Type of Order' to choose the type of request
- 'Created Date' to choose a time frame
- 'Quick Search' to search by document number, requisition name or supplier name.

For this example, I will

- leave 'All' for the 'Type of Order', and
- will choose 'Last 180 days' for the 'Created Date'.

Click on the red 'Apply' button.



8. For more information about a specific document, click on the 'Order Identifier' number.

Orders ▸ Search ▸ All Orders

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Search All Orders

Quick Filters My Searches

Type of Order: All Created Date: Last 180 days

1-19 of 19 Results

Order Identifier	Type	Order Status
3145332	Purchase Order	Complete

Vendor: Sigma-Aldrich Canada Co. (8), Dell Computer Corporation, Sandra E. Nelson (5)

- 8b. For more information con't ...

For this example, I will choose 'PO Approvals' to view where the document is in the workflow.

Purchase Order: 3145332 Revision 0

3145332

Vendor: Sandra E. Nelson
 Status: Completed
 Document Total: **35,000.00 USD**
[View Related Documents](#)

Status

Purchase Order ▸

- Revisions
- PO Approvals
- Change Requests
- Receipts
- Invoices (1)
- Comments
- Attachment Overview

Status

General Information

PO/Reference No.
 Revision No.
 Vendor Name
 Purchase Order Date
 Total
 Owner Name
 Owner Phone
 Owner Email
 Requisition Number

Document Status

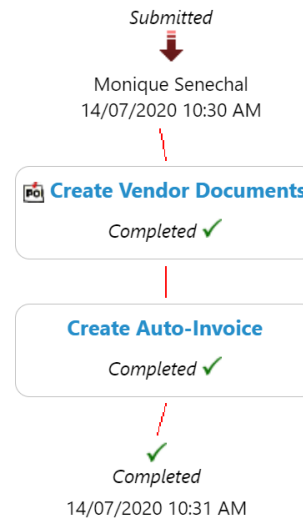
A/P status
 Workflow
 Preferred Method of Communication

Vendor
 Receiving
 Invoicing
 Matching

8c. For more information con't ...

PO Approvals

To find out how long it has been at a particular step in the workflow, click on the blue 'History' text.



What next?

- Visit carleton.ca/facts/eShop to find more videos or how-to sheets.
- Questions about the system? Email procurement@carleton.ca.