



# eShop How-To Sheets

## Searching Documents & Workflow Status

### This how-to sheet outlines the steps required to:

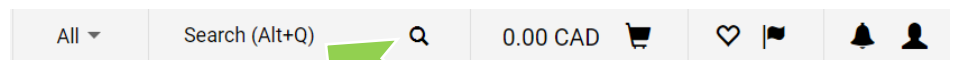
- Search documents within eShop (e.g. requisitions, purchase orders, goods receipts, invoices).
- Determine where an order is in the workflow status (e.g. tracking a requisition).

### From cart to requisition:

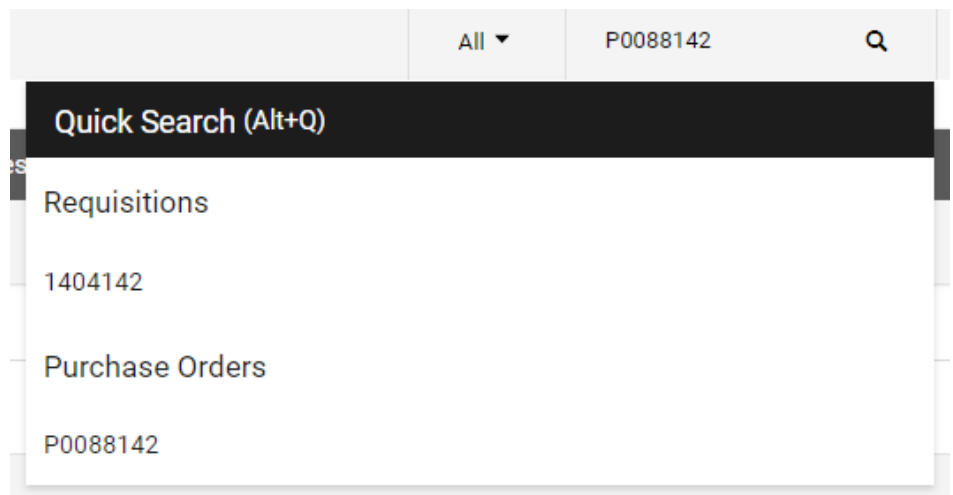
- Once you submit a cart in eShop it is called a requisition.
- Once the requisition moves through approvals, it becomes a purchase order which is sent to a vendor.

### THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1. 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.



From the available options, click on the document you want to view (e.g. P0088142).



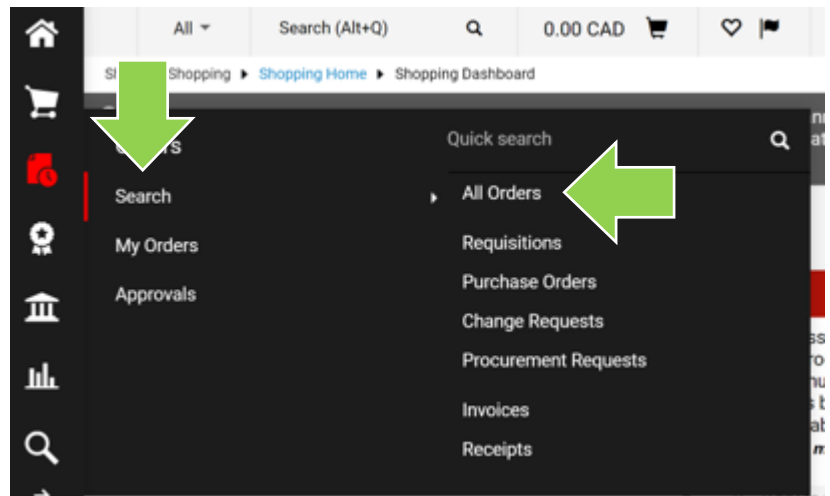
2. If you don't know the document number, the 'Orders' search allows you to search through all of your eShop documents.

Click on the 'Orders' icon.



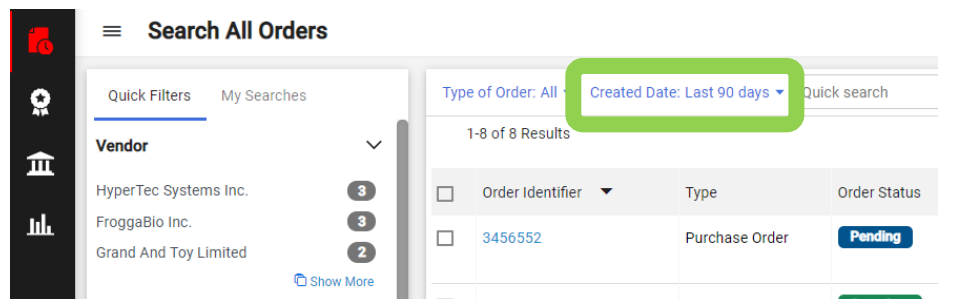
3. In the new window, click on 'All Orders'.

**Tip:** You may instead choose the type of document you are searching for (e.g. 'Purchase Orders').



4. This search window will appear.

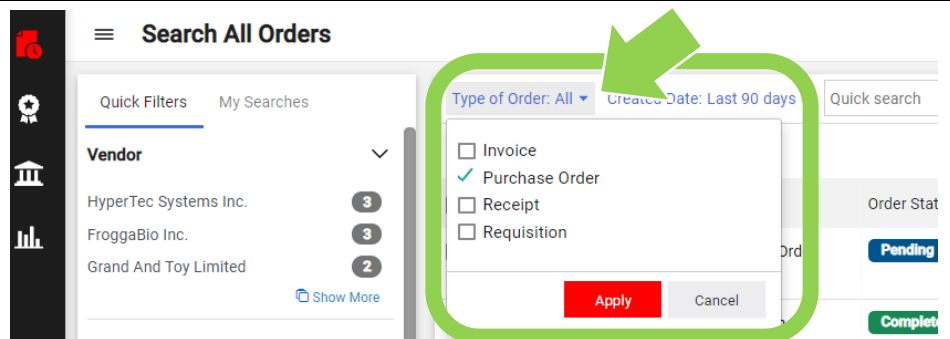
The default options will return all of documents for the last 90 days.



- 5a. To refine your search ...

Use the 'Type of Order' drop down to choose the type of document you wish to view by clicking the radio button beside an option (e.g. Purchase Order).

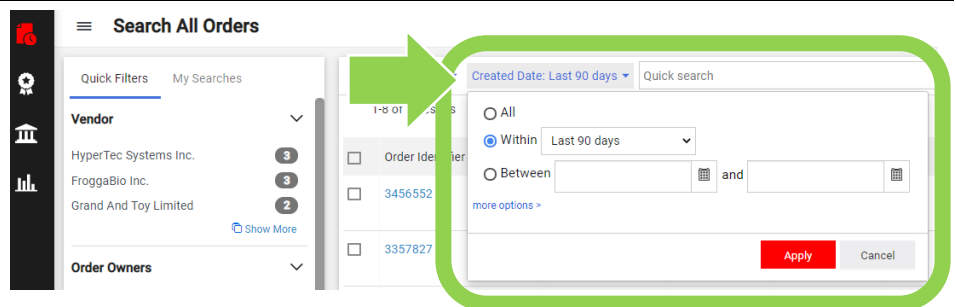
Click on the red 'Apply' button.



- 5b. To refine your search ...

Use the 'Created Date' drop down to choose a time frame.

Click on the red 'Apply' button.

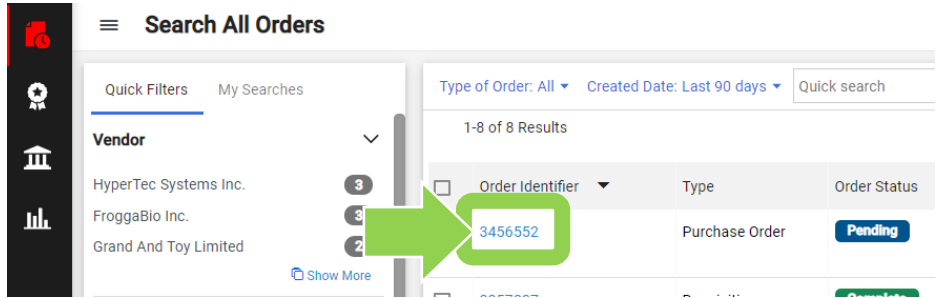


5c. To refine your search ...

Type a document number, requisition name or supplier name in the 'Quick search' field and click enter.

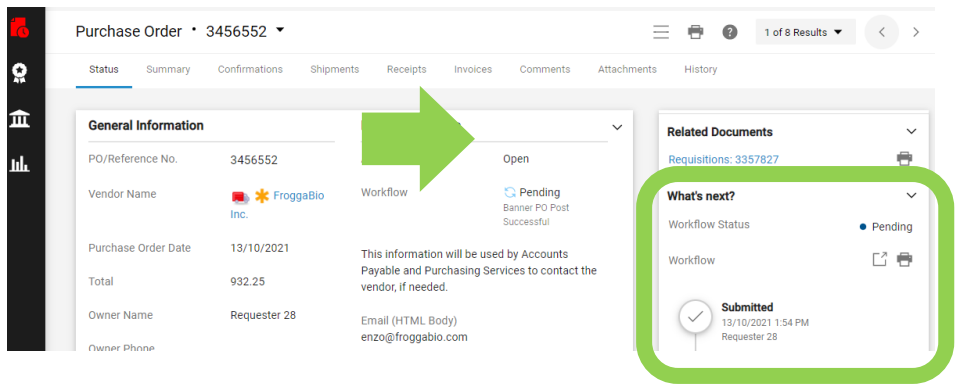


6a. For more information about a specific document in the search results, click on the 'Order Identifier' number.



6b. To view workflow status ...

The 'What's Next?' box will tell you what the status of your order is.



What next?

- Visit [carleton.ca/facts/eShop](http://carleton.ca/facts/eShop) to find more videos or how-to sheets.
- Questions about the system? Email [procurement@carleton.ca](mailto:procurement@carleton.ca).