



eShop How-To Sheets

Searching documents & determining workflow status

This how-to sheet outlines the steps required to:

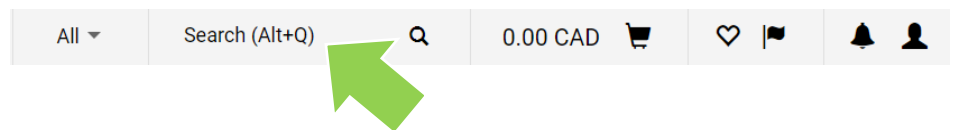
- Search documents within eShop (e.g. requisitions, purchase orders, goods receipts, invoices).
- Determine where an order is in the workflow status (e.g. tracking a requisition).

From cart to requisition:

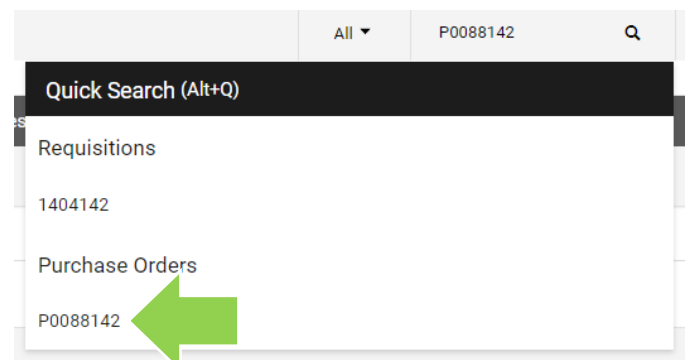
- Once you submit a cart in eShop it is called a requisition.
- Once the requisition moves through approvals, it becomes a purchase order which is sent to a vendor.

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).



2a. Searching for a document

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

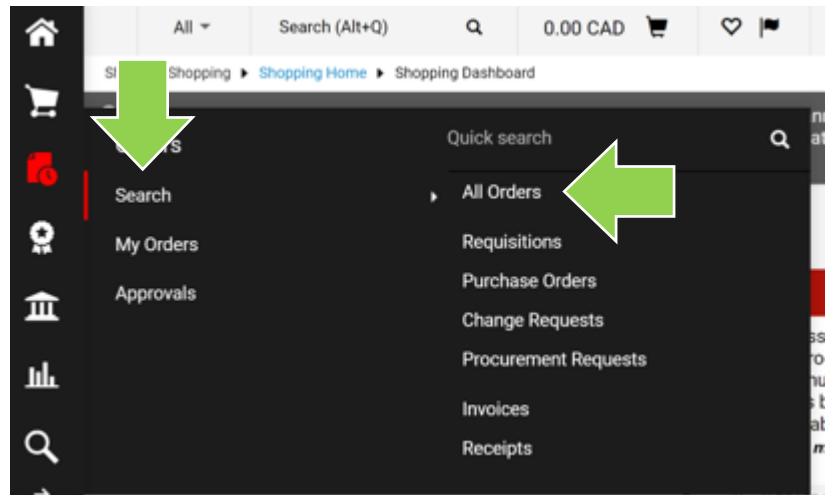
Click on the **'Orders'** icon.



2b. Searching for a document

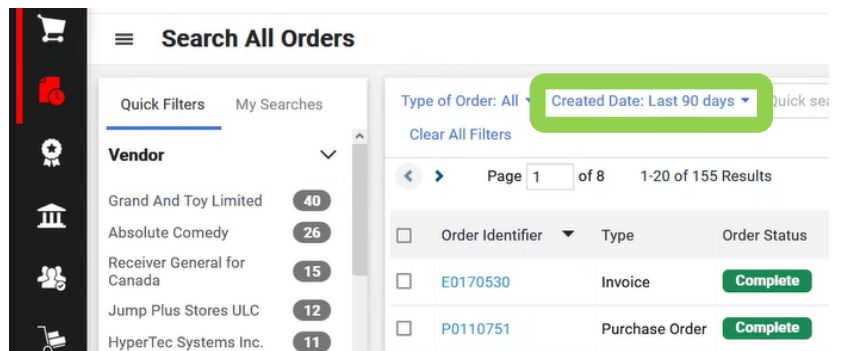
In the window that opens, click on the white **'All Orders'** text.

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



2c. Searching for a document

In the search window that appears, all documents for the last 90 days will be listed.



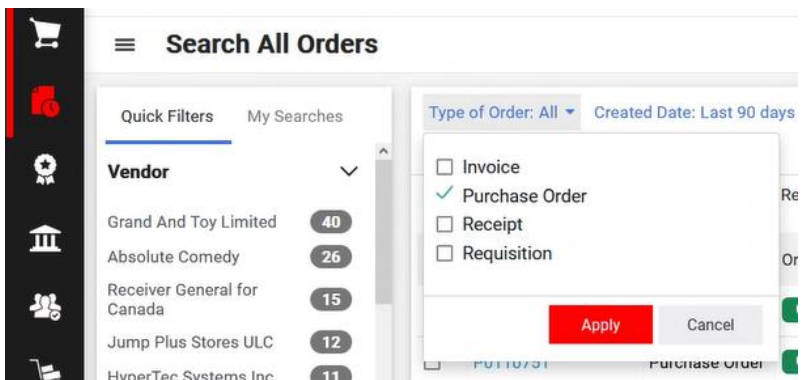
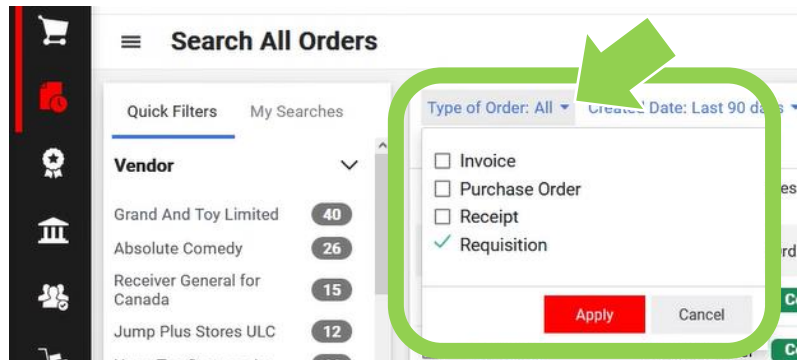
3a. Refining Your Search

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).

Tip: You may search for a requisition to determine where it's sitting in the workflow.

Tip: You may search for a purchase order to determine whether it has been sent out to a vendor.

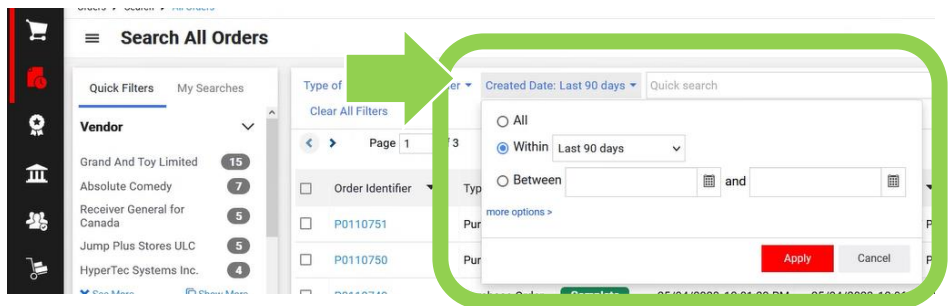
Click on the red **'Apply'** button.



3b. Refining Your Search

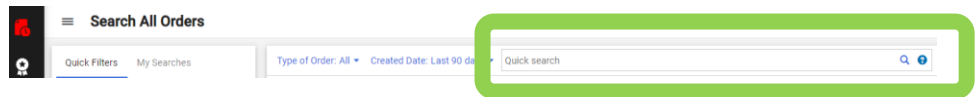
To refine your search, use the 'Created Date' drop down to choose a time frame.

Click on the red **'Apply'** button.

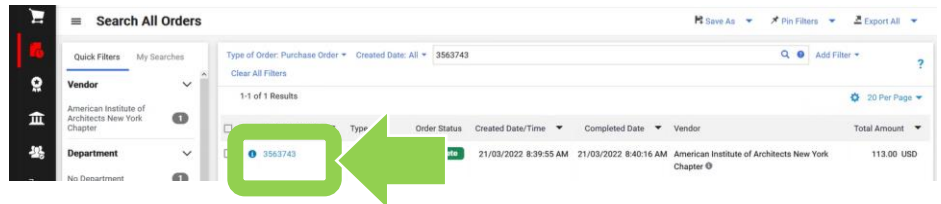


3c. Refining Your Search

To refine your search, type a document number, requisition name or supplier name in the 'Quick search' field and press the enter key.

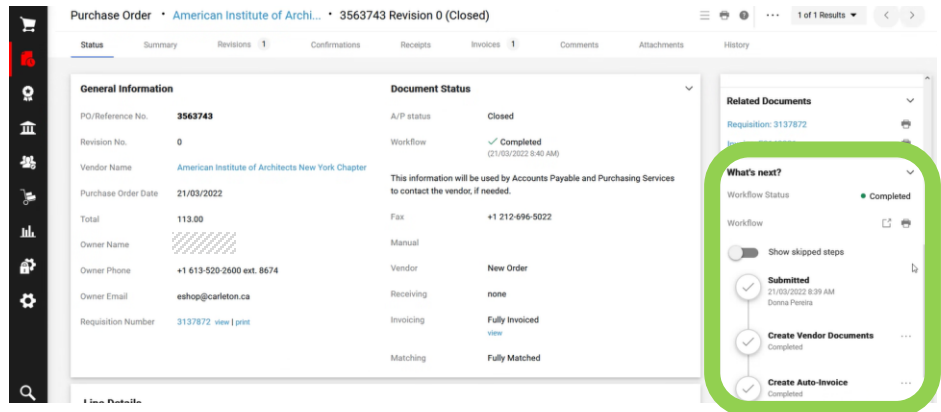


4. For more information about a specific document in the search results, click on the blue 'Order Identifier' number.



5. 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 to find more videos or how-to sheets.
- Questions about the system? Email eshop@carleton.ca.