



eShop How-To Sheets

Customize your document search

This how-to sheet outlines the steps required to:

- Search documents within eShop (e.g. requisitions, purchase orders, receipts, invoices) using filters.
- Customize your document search filters for more precise results.

From cart to requisition:

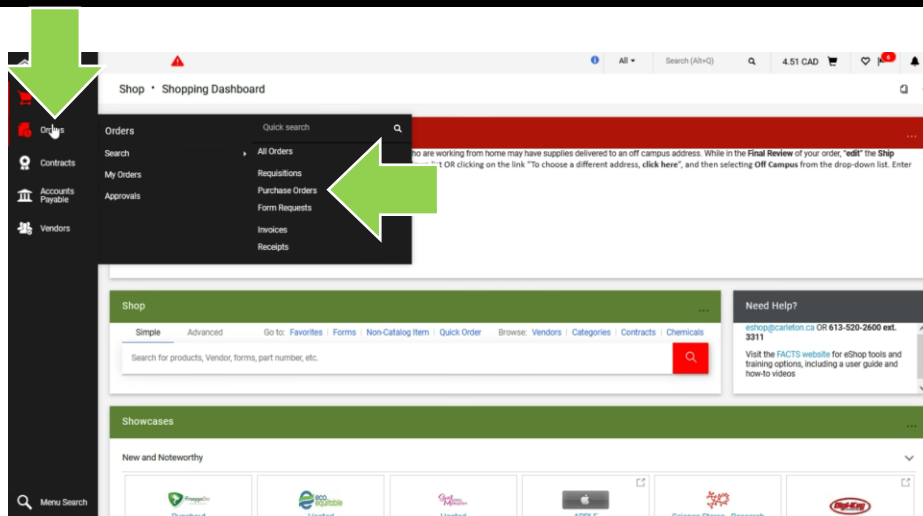
- Once you submit a cart in eShop it is called a requisition.
- Once the requisition moves through approvals, it becomes a purchase order which is sent to a vendor.

Last updated December 11, 2024.

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

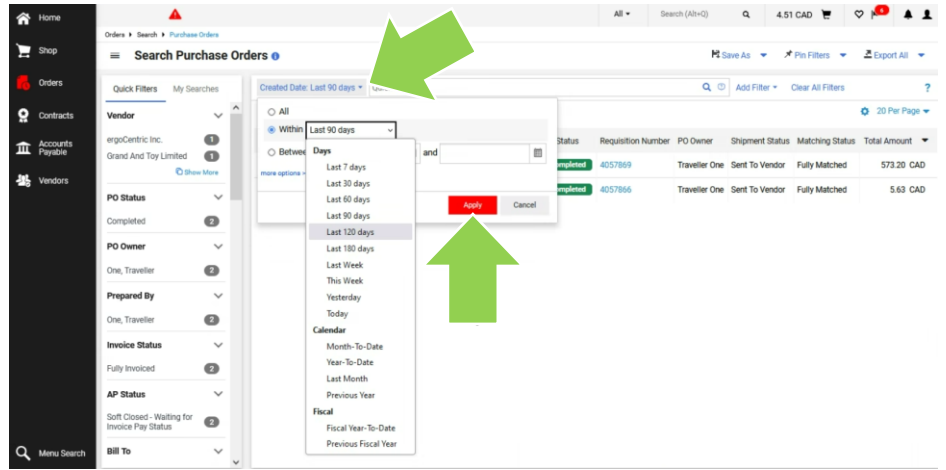
1. From the eShop landing page, click on **'Orders'** or the **'Orders'** icon.

In the flyout menu, select the type of document you want to search for (e.g. Purchase Orders).

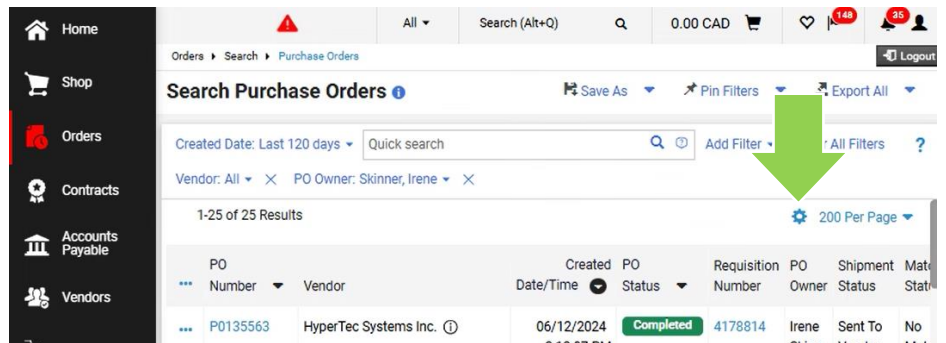


2. Click on the drop-down arrow beside the **'Created Date'** to choose the desired timeframe.

Then click the red **'Apply'** button.



3. Click on the wheel icon on the right-hand side of your screen to bring up the 'Configure Column Display' window.



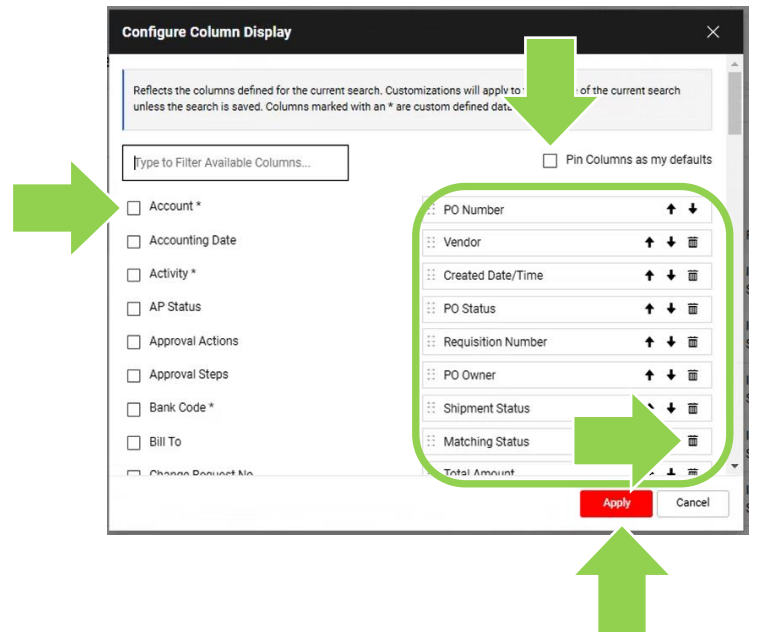
4. In the **'Configure Column Display'** window, the options listed on the right are the columns of data displayed in your search results. (**note:** the options you see may differ from those in this screen capture).

To **add** another column, click on a box by an option on the left (e.g. Account in this screen capture).

To **remove** a column from the right, click on a garbage can icon (e.g. Matching Status in this screen capture).

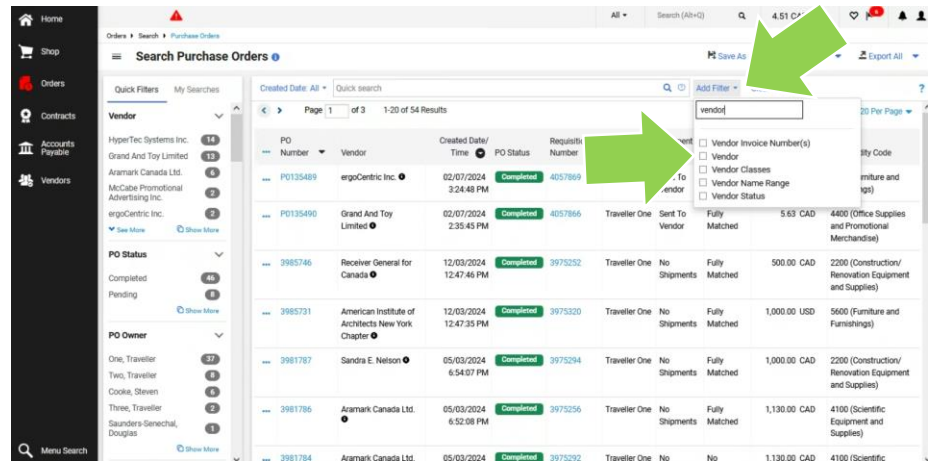
To **rearrange** the order of the columns on the right, click on an option (e.g. Vendor) and holding down mouse button, drag it to desired spot.

Once done, check the box beside **'Pin Columns as my defaults'** and then click the red **'Apply'** button.



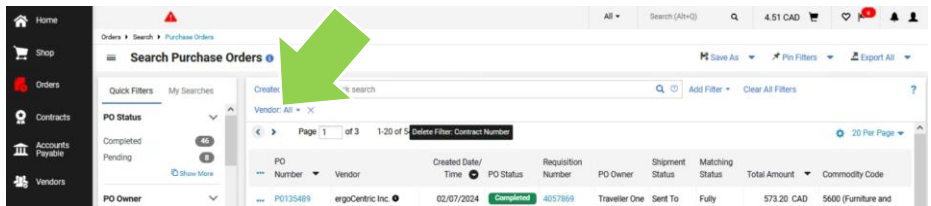
5. To easily sort through the search results, add a filter by clicking on the blue **'Add Filter'** text.

From the drop-down window, click on the box beside the filter you would like to add. For example, 'Vendor' is a commonly used filter.

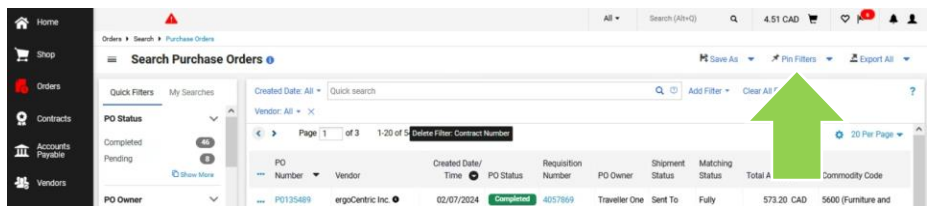


The filter you've chosen will appear at the top.

Tip: You can add multiple filters to further refine your search. Repeat step 5.

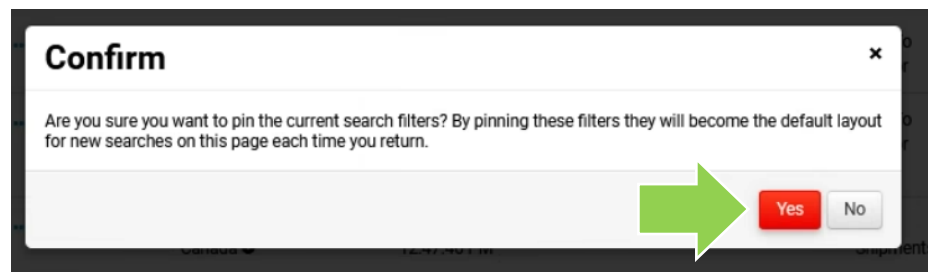


6. Once you've customized your search options, click on the blue **'Pin Filters'** text in the top right corner. This will save the filter options you've chosen.



7. In the **'Confirm'** box that opens, click the red **'Yes'** button to confirm that this is the set up you want to see the next time you open 'Orders' and search Purchase Orders.

Note: In this example, these parameters have been set up specifically for Purchase Orders. If you want to set search parameters for other types of documents, repeat the steps in this how-to sheet.



What next?

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