

EPIC – How to Search for Documents

As long as you have EPIC access, you have the ability to view all documents in the system regardless if you are the person that created the request. You can search for documents using the ID number or by using the various filters available to narrow down the document that you are looking for in the system.

Let's take a look at how this can be done!

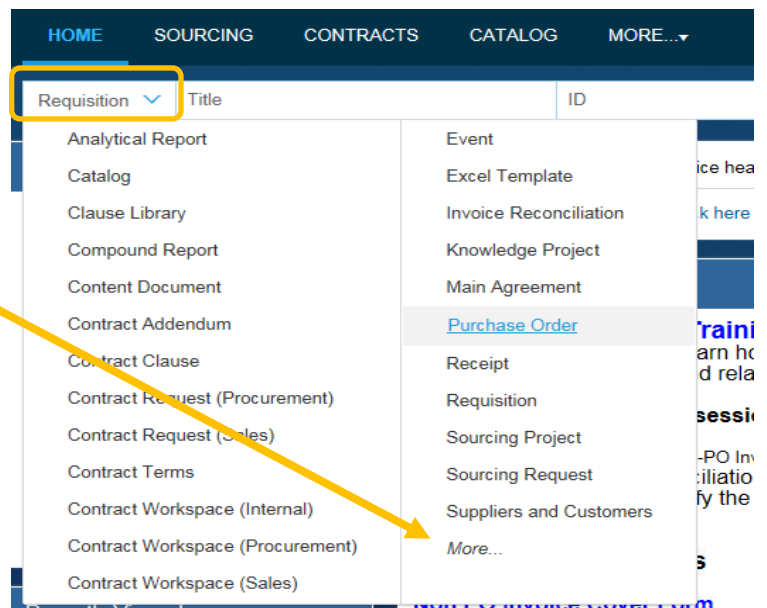
Search Bar

On the **Home Dashboard** of EPIC, a search bar is located near the top of the page. In the search bar it may default to *Requisition* or *Catalog*.

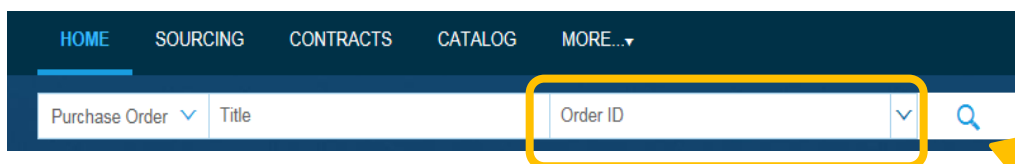


Searching for Purchase Orders

1. Click in the document type field of the search bar and select **Purchase Order**.
 - a. If you cannot find the document type in the drop down, select **More...** to view a full list.



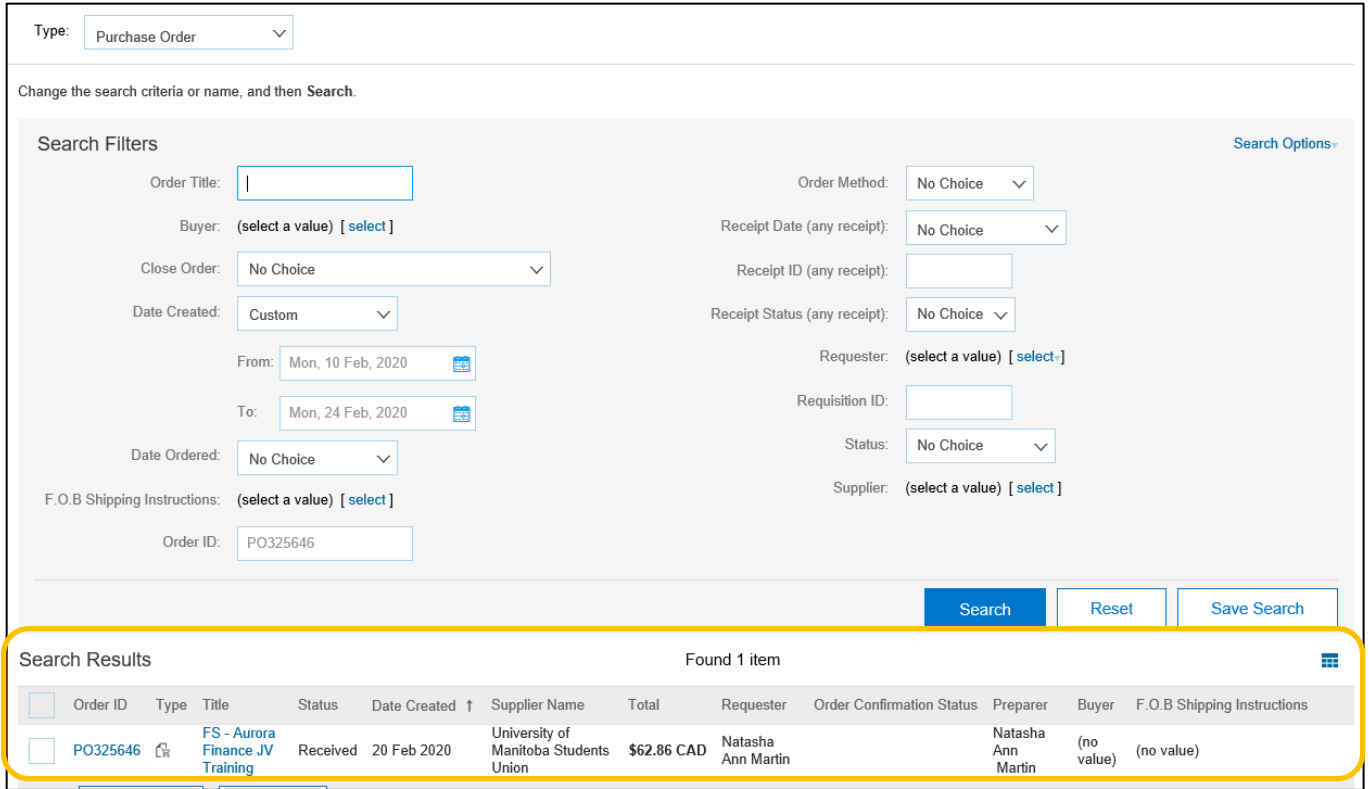
2. Once you have selected Purchase Order, the fields will change accordingly.
 - a. Enter the PO number (eg. PO325646) in the **Order ID** field.



- b. Click the **magnifying glass icon** to search for the document you entered.

3. You will be brought to the **Search Filters** page.

- a. The Purchase Order will display in the search results if it was created in the most recent two weeks.



Type:

Change the search criteria or name, and then Search.

Search Filters Search Options-

Order Title:

Order Method:

Buyer:

Receipt Date (any receipt):

Close Order:

Receipt ID (any receipt):

Date Created:

Receipt Status (any receipt):

From:

Requester:

To:

Requisition ID:

Date Ordered:

Status:

F.O.B Shipping Instructions:

Supplier:

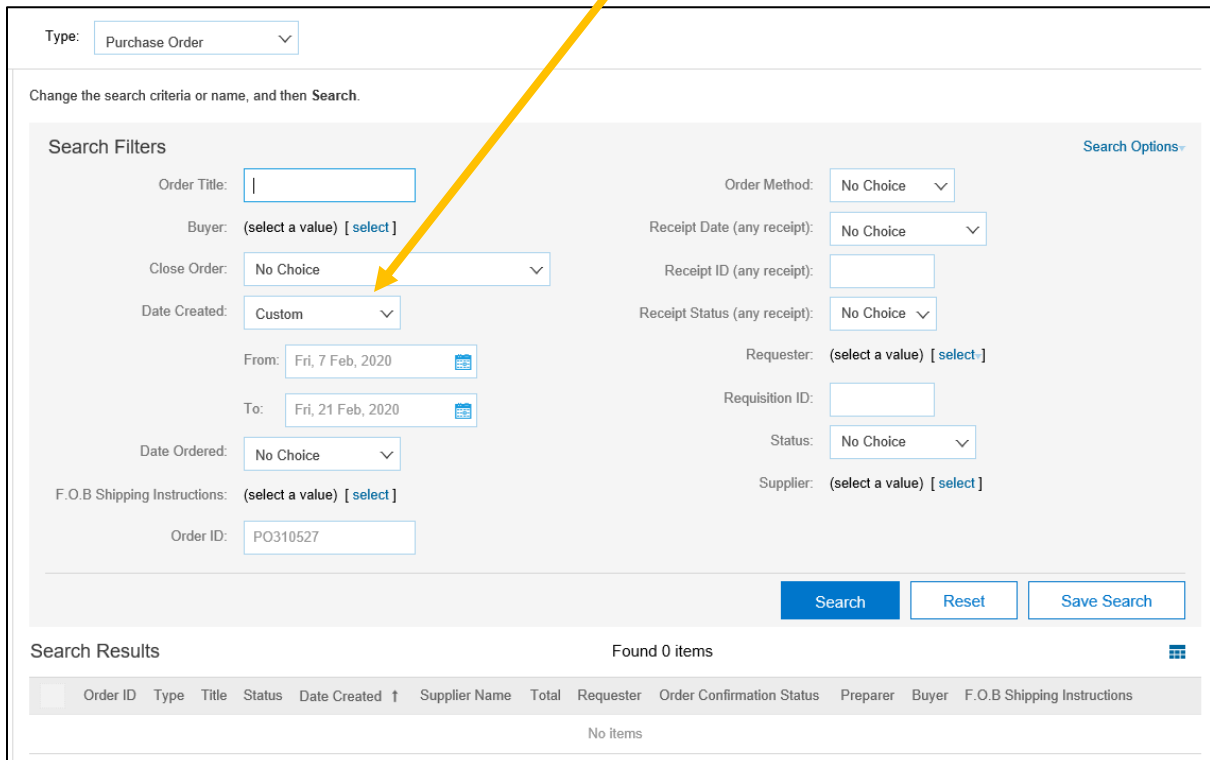
Order ID:

Search Results Found 1 item

Order ID	Type	Title	Status	Date Created	Supplier Name	Total	Requester	Order Confirmation Status	Preparer	Buyer	F.O.B Shipping Instructions
<input type="checkbox"/> PO325646		FS - Aurora Finance JV Training	Received	20 Feb 2020	University of Manitoba Students Union	\$62.86 CAD	Natasha Ann Martin		Natasha Ann Martin	(no value)	(no value)

- b. If no results appear, the Purchase Order may have been created longer ago than two weeks.

- i. To remove the time frame restriction, click in the field beside **Date Created** and change the selection from **Custom** to **No Choice**.



Type:

Change the search criteria or name, and then Search.

Search Filters Search Options-

Order Title:

Order Method:

Buyer:

Receipt Date (any receipt):

Close Order:

Receipt ID (any receipt):

Date Created:

Receipt Status (any receipt):

From:

Requester:

To:

Requisition ID:

Date Ordered:

Status:

F.O.B Shipping Instructions:

Supplier:

Order ID:

Search Results Found 0 items

Order ID	Type	Title	Status	Date Created	Supplier Name	Total	Requester	Order Confirmation Status	Preparer	Buyer	F.O.B Shipping Instructions
No items											

- ii. Click **Search** to update the results.

Type: Purchase Order

Change the search criteria or name, and then Search.

Search Filters

Order Title:

Buyer: (select a value) [select]

Close Order: No Choice

Date Created: No Choice

Order Method: No Choice

Receipt Date (any receipt): No Choice

Receipt ID (any receipt):

Receipt Status (any receipt): No Choice

Requester: (select a value) [select]

Requisition ID:

Status: No Choice

Supplier: (select a value) [select]

Search

Reset

Save Search

Search Results Found 1 item

Order ID	Type	Title	Status	Date Created	Supplier Name	Total	Requester	Order Confirmation Status	Preparer	Buyer	F.O.B Shipping Instructions
PO310527	FS - Aurora Finance Advanced FAST	Oct 2019	Received	8 Oct 2019	University of Manitoba Students Union	\$36.56 CAD	Natasha Ann Martin		Natasha Ann Martin	(no value)	(no value)

Label

Print

Click the **PO number** to open the document in the page.

You can use the same steps above for searching other documents types such as Requisitions.

Searching Without a Document ID Number

If you do not know the document ID number, there are a variety of filters that can be used to narrow down your results to that document.

1. Click in the document type field and select your choice of document.

HOME SOURCING CONTRACTS CATALOG MORE...

Requisition Title ID

- Analytical Report
- Catalog
- Clause Library
- Compound Report
- Content Document
- Contract Addendum
- Contract Clause
- Contract Request (Procurement)
- Contract Request (Sales)
- Contract Terms
- Contract Workspace (Internal)
- Contract Workspace (Procurement)
- Contract Workspace (Sales)
- Event
- Excel Template
- Invoice Reconciliation
- Knowledge Project
- Main Agreement
- Purchase Order
- Receipt
- Requisition
- Sourcing Project
- Sourcing Request
- Suppliers and Customers
- More...

2. The fields in the search bar will change according to the document type you have chosen.
 - a. Leave all fields blank and click the **magnifying glass icon** to search.

HOME SOURCING CONTRACTS CATALOG MORE...

Purchase Order Title Order ID

Search

3. You will be brought to the Search Filters page. Use the filters to narrow down your search for the document you are looking for in the system.

a. Commonly used filters are Requester, Supplier, and Date Created.

Type:

Change the search criteria or name, and then Search.

Click **Search Options** to add or remove filters from your page.



Search Filters

Order Title: <input type="text"/>	Order Method: <input type="text" value="No Choice"/>
Buyer: (select a value) [select]	Receipt Date (any receipt): <input type="text" value="No Choice"/>
Close Order: <input type="text" value="No Choice"/>	Receipt ID (any receipt): <input type="text"/>
Date Created: <input type="text" value="Custom"/>	Receipt Status (any receipt): <input type="text" value="No Choice"/>
From: <input type="text" value="Mon, 10 Feb, 2020"/>	Requester: (select a value) [select.]
To: <input type="text" value="Mon, 24 Feb, 2020"/>	Requisition ID: <input type="text"/>
Date Ordered: <input type="text" value="No Choice"/>	Status: <input type="text" value="No Choice"/>
F.O.B Shipping Instructions: (select a value) [select]	Supplier: (select a value) [select]
Order ID: <input type="text"/>	

- Buyer
- Close Order
- Contract Workspace ID
- Date Created
- Date Ordered
- Date Received
- F.O.B Shipping Instructions
- Is Subcontractor
- Order Confirmation Status
- Order ID
- Order Method
- Order Title
- Preparer
- Purchasing Unit
- Receipt Date (any receipt)
- Receipt ID (any receipt)
- Receipt Status (any receipt)
- Requester
- Requisition ID
- Service Orders
- Status
- Supplier
-
- Select All
- Hide All

b. Click **Search** to be provided results based on the filters you have used.