



# ADDY NOTE



FINANCIALS  
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DATABASE

## ATTENTION:

This Addy Note is a procedural resource for the UCF Financials Reference Database, which only contains data prior to July 1, 2022.

## Enhanced Search

This Addy Tip provides an overview of how to use new Enhanced Search features in UCF Financials.

### Search Tips

To improve your results when conducting an Enhanced Search, apply the following search tips:

Item	Definition
Phrases	Use double quotes around works that make up a phrase. Example: “year-end report”
All Words	Use an ampersand (&) to specify that all words must appear in the results. Example: “aname & plumbing”
Any Words	Use a pipe ( ) to specify that any word must appear in the results. Example: ‘year-end report’ report
Partial Words	Use an asterisk (*) to search for partial words. Example: document* returns a search with words beginning with document such as documents, documentary, documentation

Enhanced Search can be utilized in two locations in UCF Financials: above the navigation menu and through a new tab on Financials pages.



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## Enhanced Search – Advanced Search Drop-down Menu

The Enhanced Search located above the navigation menu allows you to search all of Financials or to select a category in which to search. To the right of the search box is the **Advanced Search** options.

The screenshot shows the UCF Financials application interface. At the top, there is a navigation bar with the UCF Financials logo on the left and user options like 'myUCF', 'Home', 'Worklist', 'Performance Trace', 'Add to Favorites', and 'Sign out' on the right. Below the navigation bar, there is a search area with a dropdown menu set to 'All', a search box, and an 'Advanced Search' link. A red circle highlights this search area. Below the search area, the main content area displays a 'Top Menu Features Description' section with a message: 'Our menu has changed! The menu is now located across the top of the page. Click on Main Menu to get started.' It also includes 'Highlights' for 'Recently Used pages', 'Breadcrumbs', and 'Menu Search'.



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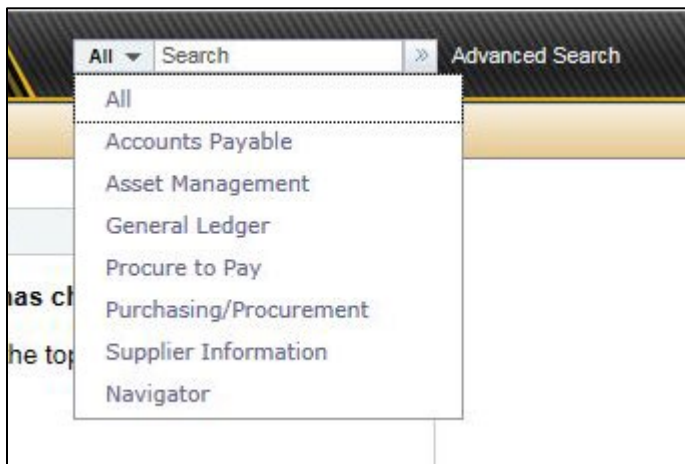
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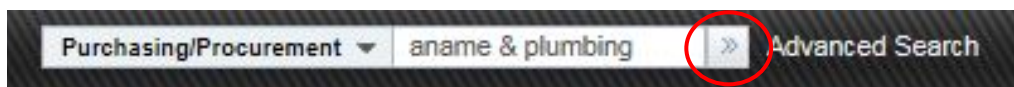
First, select the area in which you wish to conduct the search. The topical areas that are available for search are:

- **Accounts Payable**
- **Asset Management**
- **General Ledger**
- **Procure to Pay**
- **Purchasing/Procurement**
- **Supplier Information**
- **Navigator**



For this example, the user selected **Purchasing/Procurement**.

Next, enter search term(s) in the search field and select the arrow button. In our example, the user entered a buyer's name (**aname**), an ampersand (**&**) and a category (**plumbing**).





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FINANCIALS  
REFERENCE  
DATABASE

The search results display:

The screenshot shows the UCF Financials search results interface. The search criteria is "aname & plumbing", resulting in 643 matches. The results are displayed in a list format with filters on the left and a table of results on the right.

**Search Results for " & plumbing"**

Filter by: **aname** 643 results matched your search criteria

**Category:** Purchase Orders (643)

**Business Unit:** UCF01 (643)

**Document Date:** 2018 (54), 2017 (212), 2016 (107), 2015 (105), 2014 (93), More...

**Department:** 02800009 (217), No Value (130), 03410303 (78), 02800025 (44), 02800008 (27), More...

**Supplier Name:** Mechanical Services of C..(91), Trane US Inc (50), Reliable Services Group ..(36), W W Gay Mechanical Contr..(21), Cascade Water Services I..(20), More...

**Entered By:** aname

Document Title	Last Updated Date
<a href="#">Purchase Order - UCF01   0000338697</a>	2016-11-01 12:13:46
<a href="#">Purchase Order - UCF01   0000272554</a>	2016-09-29 06:45:19
<a href="#">Purchase Order - UCF01   0000313778</a>	2016-09-29 06:45:19
<a href="#">Purchase Order - UCF01   0000327788</a>	2016-09-29 06:45:19
<a href="#">Purchase Order - UCF01   0000278363</a>	2016-09-29 06:45:19
<a href="#">Purchase Order - UCF01   0000340441</a>	2017-06-29 11:34:35
<a href="#">Purchase Order - UCF01   0000338700</a>	2018-02-26 16:56:20



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FINANCIALS  
REFERENCE  
DATABASE

On the left side of the search results, filters are available to refine your results. For example, if you only want documents with a 2018 date, you would select the **2018** link under **Document Date**.

Filter by

**Category**  
Purchase Orders (643)

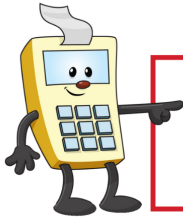
**Business Unit**  
UCF01 (643)

**Document Date**  
[2018 \(54\)](#)  
[2017 \(212\)](#)  
[2016 \(107\)](#)  
[2015 \(105\)](#)  
[2014 \(93\)](#)  
[More...](#)

**Department**  
[02800009 \(217\)](#)  
[No Value \(130\)](#)  
[03410303 \(78\)](#)  
[02800025 \(44\)](#)  
[02800008 \(27\)](#)  
[More...](#)

**Supplier Name**  
[Mechanical Services of C..\(91\)](#)  
[Trane US Inc \(50\)](#)  
[Reliable Services Group ..\(36\)](#)  
[W W Gay Mechanical Contr..\(21\)](#)  
[Cascade Water Services I..\(20\)](#)  
[More...](#)

**Entered By**  
[aname](#)



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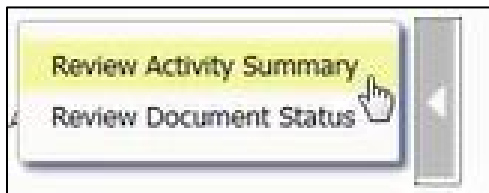
To page through your search results, click the numbers at the top of the page:



To view available actions, click the white arrow on the side of the search results:



If you wish to take one of the listed actions, click the action and follow any necessary steps to complete it.





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## Enhanced Search – Keyword Search Tab

The Enhanced Search is also located within UCF Financials in the new **Keyword Search** tab. Once you have entered search criteria in the **Keywords** field, select the **Search** button.

**Purchase Order**

Enter any information you have and click Search. Leave fields blank for a list of all values.

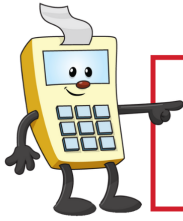
Find an Existing Value **Keyword Search**

Note: Keyword Search will return results last updated 2 days ago (05/16/2018 12:36:19PM) [Search Tips](#)

▼ **Search Criteria**

Keywords

**Search** [Basic Search](#) [Advanced Search](#)



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The **Search Results** display. You can use the filters on the left to further refine your results. You can change the layout of your results by adjusting the **View as** option.

Search
Basic Search Advanced Search

Search Results

**Filter by**

**Business Unit**

UCF01 (125)

**Purchase Order Date**

2018 (35)  
2017 (74)  
2016 (13)  
2015 (3)

**Supplier Name**

Trane US Inc (12)  
M & J Enterprises International Inc (7)  
Reliable Services Group LLC (7)  
Cascade Water Services Inc (6)  
KZF Design LLC (6)

Note: Keyword Search will return results last updated 2 days ago (05/16/2018 12:36:19PM)

55 of 125 results are displayed.

View as: ☰ ☐

View All

Business Unit	PO ID	Purchase Order Date	PO Status	Short Supplier Name	Supplier ID
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					
UCF01					