Creating and Naming AP Search Criteria in 8.9

When running a Vendor, Payment or Voucher Inquiry, you must populate certain fields, telling the system what you are looking for. In many instances, you may run the inquiry repeatedly (daily, weekly, monthly) using the same criteria, perhaps changing only dates or ranges.

Version 8.9 has the capability of naming and saving the fields you use repeatedly when running these inquiries. When it comes time to run the inquiry again, you can recall the named criteria, seeing only the criteria you need, updating any field necessary, and running the inquiry. (We will only use the Voucher Inquiry example in this help document.)

NOTE: You may notice that when you look up existing AP Search Criteria, named criteria from other business units appear. For this reason, we are insisting you use a naming convention for your saved criteria. Named appropriately, you'll be able to locate your criteria quickly.

IMPORTANT NOTE: NEVER alter the 'ALL' criteria.

    1.   Add an AP Search Criteria (notice naming convention)

Business Unit

Your Initials

Name identifying inquiry type and descriptive to purpose of the inquiry

    2.   Identify fields necessary and save criteria.

![Core-CT]

Named Search Criteria List

Search Name AES_JIP_VO_54060

Available Fields	
Amount Rule	☐
Approval Status	☐
Bank Account	☐
Bank Account #	☐
Bank Code	☐
Contract ID	☐
Control Group ID	☐
Department	☐
Draft Master ID	☐
Draft Payment Status	☐
Due Date	☐
Entered on	☐
GL Business Unit	☐
IPAC Payment	☐
Invoice Date	☐
Invoice ID	☐
Item ID	☐
Lease Number	☐
Match Status	☐
Operator Id	☐
Origin	☐
Pay Cycle	☐
Payment Date	☐
Payment Method	☐
Payment Reference	☐
Payment Status	☐
Post Status	☐
Prepaid Applicable	☐
Process Instance	☐
Purchase Order	☐
Remit Vendor	☐
Schedule ID	☐
Scheduled Pay Date	☐
Scheduled Payment Hold	☐
Settle by	☐
Settlement Status	☐
Short Vendor Name	☐
Single Payment	☐
Transaction Currency	☐
VAT Reg ID	☐
Vendor ID	☐
Vendor Name	☐
Voucher Balance	☐
Voucher ID	☐
Voucher Source	☐
Voucher Style	☐
Account	X
Accounting Date	X
Business Unit	X

Selected Fields	
	☐

Identify fields necessary for inquiry

🖫 Save   📧 Notify   📑 Add   📄 Update/Disp

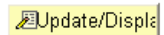3. Select fields identified.

Named Search Criteria List

Search Name AES_JIP_VO_54060

Available Fields			Selected Fields	
Amount Rule	☐		Business Unit	☐
Approval Status	☐		Accounting Date	☐
Bank Account	☐		Account	☐
Bank Account #	☐			
Bank Code	☐			
Contract ID	☐			
Control Group ID	☐			
Department	☐			
Draft Master ID	☐			
Draft Payment Status	☐			

4. Save the Criteria

Remit Vendor	☐
Schedule ID	☐
Scheduled Pay Date	☐
Scheduled Payment Hold	☐
Settle by	☐
Settlement Status	☐
Short Vendor Name	☐
Single Payment	☐
Transaction Currency	☐
VAT Reg ID	☐
Vendor ID	☐
Vendor Name	☐
Voucher Balance	☐
Voucher ID	☐
Voucher Source	☐
Voucher Style	☐

Save   Notify   Add   Update/Displa

5. Run the inquiry using your saved AP Search Criteria.
   - Change 'ALL' criteria to your named criteria.

Voucher Inquiry

Search Criteria

Search Name: ALL

	From		To	
Business Unit	AESM		AESM	
Voucher ID				
Invoice Id				
Vendor SetID	STATE			
Short Name				
Vendor ID				
Vendor Location				
Accounting Dt				
Invoice Date				
Due Date				
Entered Date				
Origin Set ID				
Origin				
Control Group ID				
Contract ID				
Lease Number				
PO Business Unit				
Purchase Order				
Item ID				
*Amount Rule	Any			
Amount				
Currency				
*Voucher Style	All Vouchers			
Post Status				
Approval Status				
Voucher Balance				
Voucher Source				
User ID				
GL Business Unit				
Account				
Department				
VAT No				
Process Instance				
Match Status				
Max Rows	300	Search	Clear	

6. Enter your BU to isolate your criteria. Then use 'lookup.'

Voucher Inquiry

Search Criteria

Search Name: AES

	From		To	
Business Unit	AESM		AESM	
Voucher ID				
Invoice Id				

Look Up Search Name

Search by: **Search Name** begins with AES

Look Up   Cancel   Advanced Lookup

Search Results

View All   First ◀ 1 of 1 ▶ Last

Search Name

AES_JIP_VO_54060

6.   Notice the fields appearing are now only those you need to address. Make any appropriate changes (dates, ranges). Then click 'Search.' Your results should appear below.

Voucher Inquiry

Search Criteria

	From	To
Search Name	AES_JIP_VO_54060 🔍	
Business Unit	AESM 🔍	AESM 🔍
Accounting Dt	07/01/2006 📅	07/31/2006 📅
Account	54060	
Max Rows	300 Search Clear	

Additional Hint:

You can update a search criteria by simply going into 'Find Existing Value' entering that name, selecting the field (s) you no longer want, and moving them to the Available Fields side on the left, using the left arrow button. Then save the new criteria.

Named Search Criteria List

Search Name AES_JIP_VO_54060

Available Fields				Selected Fields	
Amount Rule	☐			Account	☑
Approval Status	☐			Accounting Date	☐
Bank Account	☐			Business Unit	☐
Bank Account #	☐				
Bank Code	☐				
Contract ID	☐				
Control Group ID	☐				
Department	☐				