UGAmart Document Search: Common Filters and Uses

This is a companion document to the UGAmart Document Search tutorial and provides a list of commonly-used filters and columns as well as suggested uses that may help guide users in creating their preferred saved searches. This list will be modified as users identify filters and columns that need additional help text or additional helpful filter combinations. *(Note: Accounting Codes can only be viewed or searched by users with a Requisitioner, Approver, or higher role.)*

UGAmart Document Search Filters/Columns	
Filters/ Columns	**Description and Suggested Uses**
Created Date	This is the only filter that appears on every user's Purchase Order document search prior to customizing. This provides options for filtering based on dates or number of days. This can be used to prioritize review of aging POs, since Older POs generally need more following up by the end user department. An older date may indicate that there is a delay or some other hold-up in the process that requires the department user to follow up with the vendor. *Note that this filter initially defaults to POs created within the last 90 days.*
PO Number	This UGAmart PO # matches the FMS PO # for all POs created after 4/17/2021. 'E' value will bring up all external POs to distinguish from internal POs, such as CESS, CRS, and PPE purchases.
AP Status	This indicates if the PO is Open, Closed, or Soft Closed. Users will most likely focus most effort on Open POs, but should also review Soft Closed POs, since these still can be paid or received.
Invoice Status	This indicates if the PO has been invoiced, whether Fully, Over, or Partially. This can be used to identify POs that have outstanding invoices. When used in tandem with the **Receipt Status** filter, users can see which POs have been invoiced, but not receipted, and vice versa. *(This filter is also used by Procurement to identify POs that can be closed, in tandem with **Matching Status**.)*
Invoice Pay Status	This indicates if the invoices attached to the PO are still Open (which includes No Pay Status, In-Process and Payable invoices), or Paid. This can be used to identify POs that have been invoiced, but that payment has not yet been completed, or that no invoices have been received for the PO.
Receipt Status	This indicates if the PO has been received, whether Fully, Over, or Partially. This can be used to identify POs that have not yet been receipted. When used in tandem with the **Invoice Status** filter, users can see which POs have been received, but not invoiced, and vice versa.
Matching Status	This indicates if the PO is Fully Matched, Partially Matched, or Not Matched, based on the AP matching rules, which establish when and under what circumstances an invoice is eligible for payment. This filter, in tandem with the **Invoice Status** filter, is used chiefly by Procurement to identify the POs eligible to soft close.
Department	This identifies POs based on the department chartfield/code in the chartstring/accounting codes. This should be used to identify the POs that a unit or department has ownership of. *(Note that, Accounting Codes can only be viewed or searched by users with a Requisitioner, Approver, or higher role.)*
Prepared By - Requisitioner	This identifies the requisitioner. This can be used to divide PO Monitoring workload by Requisitioner, if desired.
PO Owner	This identifies the user who originally created the cart. This can be used to divide PO Monitoring workload by Shopper, if desired and if the unit's shoppers create carts directly into UGAmart.
ClickSubID	This indicates POs that are subaward sponsored POs created by SPA. These POs should only be requested closed by SPA. In the PO Monitoring (Base) saved search, this is defaulted to exclude subaward sponsored POs.

Project-Activity	This indicates POs that have a project ID in the chartstring/accounting codes. In the PO Monitoring (Base) saved search, this is defaulted to exclude Capital Projects (those projects beginning with 'C'). This can be used to identify POs that have used a specific project as part of a department's grant/sponsored project management efforts. For instance, when a grant is ending, users can search for POs using this project to make sure that they are fulfilled, invoiced, paid, and closed in advance of the closing of the project. *(Note that, Accounting Codes can only be viewed or searched by users with a Requisitioner, Approver, or higher role.)*
Requisition Name	This is only available as a Column and not as a Filter. This provides the cart/requisition name entered when it was created. Some units/departments have used this name field to help provide free-text information for later easier searching or identification when reviewing a list of orders in Document Search.
Ship To	This is only available as a Column and not as a Filter. This provides the shipping address uses when the PO was created. This can be used to identify which POs are heading to a certain location, especially for units across multiple campuses. This can also be used to identify which shipments will be received at Central Receiving, where Mail & Receiving Services will enter receipts into UGAmart and which shipments will be the responsibility of the department to enter receipts.

Additional Resources

- PO Monitoring (Base) (via UGAtube tutorial) will be recorded during Breakout session on 9/23/2021.
- Monitoring and Closing Your Purchase Orders (PDF Training Document