

Searching on a Transaction Number

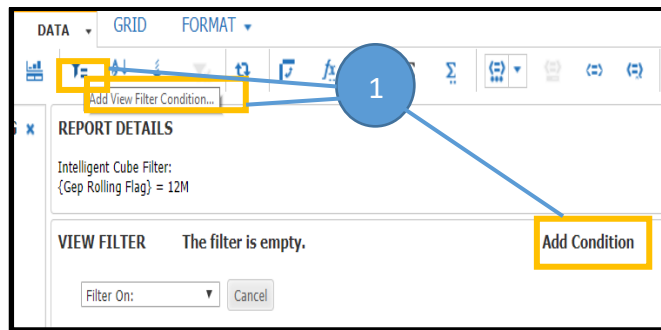
Before you start: If you do not know how to search reports, refer to *Create a Custom Report* before using this QRG.

If you know the Account #, OC#, Dept #, Fund #, PO # or Invoice #, you can select the report object and search by #.

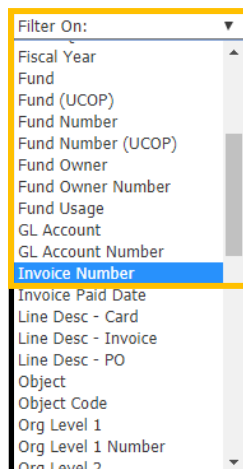
Note: The example used in this guide searches by Invoice #.

Instructions for searching on a transaction number

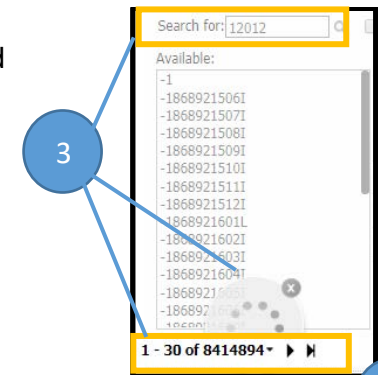
1. Select **Add Condition** from the **Data** icon or the **Add Condition** link.



2. Select a report object to filter using the **Filter On** drop down list.



3. Enter the number (or partial number) in the **Search for** field and press Enter. The number of searched records and a spinning wheel displays at the bottom. **Be patient!** Searches on large data records like invoices and POs can run 3-5 minutes after the wheel disappears.

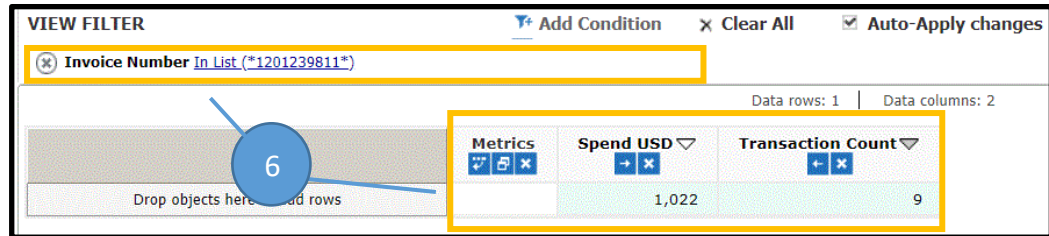


4. Select item(s) in the **Available** field and click the **right arrow** to move them to the **Selected** field.

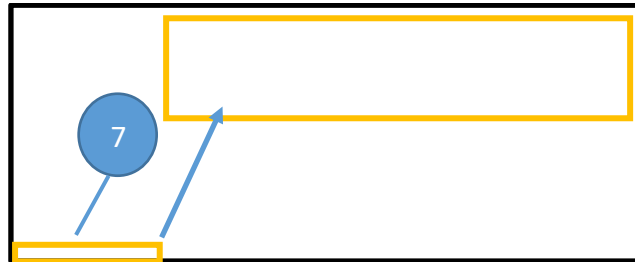


5. Select **Apply**.

- The filtered results display in the view area with the default **Spend** and **Transaction Count** data that show information related to your specific search item.



- Drag a **Report Object** to provide additional details about the search item. (In this example, the **Category 3** report object tells us what categories the fund # we entered are assigned to.



- Drag additional report objects to display more relevant report details.

Tip: When searching by invoice # not in, keep in mind that the invoice # that appears in CalUSource reports is whatever is written on the check. In other words, it is the raw name that we receive from the payment system.

