

Searching Using Narrow to Broad Syntax

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

The Spend module report function allows you to filter using search to report on a vast array of data. Utilizing effective search strategies will help you find what you are looking for quickly, by limiting your results to a manageable level. The more you know what you are looking for, the narrower you can define your search. The less you are able to define what you are looking for, the more broad your search strategy needs to be. But, if you start too narrow, you might exclude results you are looking for. This FAQ provides search strategy tips in descending order based on level of certainty. Note: This example uses Supplier, but works with all report objects.

Level of Certainty	Search Strategy	Results	Next Steps
1	You are certain of the correct spelling of the string(s). You are looking for an exact match.	Put the exact string in double quotes: "Robert Half International Inc." This search brings back 1 result. Note that using a comma would invalidate search results.	If this doesn't work, try Level 2 .
2	You only know part of a name.	Put double quotes before the name and the partial name: "Robert Ha"	If this doesn't work, try Level 3 .
3	You are certain the name begins with a string	Put an asterisk after the string: Robert*	If this doesn't work, try Level 4 .
4	You know the name contains a string, but not where the string appears in the complete name.	Put asterisk before string: *Robert	If this doesn't work, try Level 5
5	When you are fairly certain that the name has either one of two terms	No asterisks or quotes: Robert Half or "Half". This brings back 2,565 results.	Check the spelling you are entering is correct.

Supplier Search Tips:

- If, as a result of a supplier search, you do not find the supplier name that is common usage, this could indicate that the supplier name is not normalized in the system. In this case, use the CalUsource Feedback function to request a change to the supplier's name in the system. See the *Leaving Category and Supplier Feedback* Quick Reference Guide.
- When searching for a supplier, keep in mind that we could be contracting with either the parent company (a larger corporation that has significant ownership over a subsidiary or group of subsidiaries) or a subsidiary company (a company that is owned or controlled by another company). You may need to search by both the parent company and the subsidiary company to find the supplier you are looking for.