

Common Search Filters

The Orders module in BUY.IU offers a vast range of filters which you can use to locate documents. While it’s great to have so many options at your disposal, it also means you have a lot of choices to make when locating documents.

The purpose of this document is to define filters for each document-specific search which are most helpful and commonly used by IU staff.

- Remember, many commonly requested searches have already been built by Purchasing and are available to use. Review the [Locate Searches Built by Purchasing document](#) to learn more.
- Review the [Search for a Document document](#) to learn the basics of filtering searches in BUY.IU.
- Review the [Save and Manage Searches document](#) to learn how to save searches for future use.

Contents

Requisitions	1
Procurement Requests.....	2
Purchase Orders	2
Change Requests	3
Receipts.....	3
Invoices	4

Requisitions

Requisitions represent a request to purchase.

After clicking **Add Filter** on the search screen, enter the **Filter Name** and select the filter to apply it.

Filter Name	Description
Account-SubAccount	The KFS account number(s) used to fund the purchase.
Requisition Name	The cart name entered when placing the order.
Approved By	This field allows you to search by document approver.
Department	The department associated with the person who submitted the order.
Prepared By	The individual who submitted the requisition.
Prepared For	Another individual associated with the requisition. This individual is manually added to the requisition. Alternatively, the individual who built the shopping cart.
Supplier	The external entity from which goods or services were requested/purchased.
Requisition Status	Filters documents by workflow status. Pending documents are enroute and collecting approval(s), Completed documents have finished routing.
Obj Code	The KFS object code used in the Accounting Codes section.
Org	Returns documents funded by accounts within the chart and org you specify. A way to review activity by a department without entering multiple account numbers.
Org Ref Id	Added in the Accounting Codes section when entering the requisition. Defined by the department.
Project Code	Code established in KFS and added to the Accounting Codes section when entering the requisition.
Current Workflow Step	Locate documents in a specific workflow step, such as FO Approval or Org Review.

Procurement Requests

Procurement Requests represent check request forms which have not been attached to a requisition and submitted. You are only able to view your own draft check request forms. Enter the check request form name in the quick search to locate a form by form type.

Purchase Orders

Purchase orders represent an official agreement between IU and the supplier for goods and services.

After clicking **Add Filter** on the search screen, enter the **Filter Name** and select the filter to apply it.

Filter Name	Description
Account-SubAccount	The KFS account number(s) used to fund the purchase.
Department	The department associated with the person who submitted the order.
PO Owner	The individual who receives notifications about the order, such as receipt requirements. Carried forward from the Prepared By field of the requisition.
Supplier	The external entity from which goods or services were requested/purchased.
Obj Code	The KFS object code used in the Accounting Codes section.
Org	Returns documents funded by accounts within the chart and org you specify. A way to review activity by a department without entering multiple account numbers.
Org Ref Id	Added in the Accounting Codes section when entering the requisition. Defined by the department.
Project Code	Code established in KFS and added to the Accounting Codes section when entering the requisition.
PO Closed Date	Locate POs closed within a timeframe you define.
AP Status	Locate POs in open, closed, or soft closed status.
Invoice Status	Reflects if PO lines have been partially, fully, or over invoiced. A PO line is fully invoiced if both the quantity and cost have been invoiced for every line item in amounts equal to the amounts ordered on the PO.
Matching Status	This filter shows whether a PO has been partially or fully matched. A partially matched PO means that one or more, but not all, lines have received invoices and a force match was performed when approving invoices.
Receipt Status	Locate POs on which no receipts have been logged.
PO End Date Year	The year entered in the PO End Date Year field of the document. Used to locate recurring POs which are expiring and may need to be extended/renewed.
PO End Date Month	The month entered in the PO End Date Month field of the document. Used to locate recurring POs which are expiring and may need to be extended/renewed.
Recurring Payment?	Used to locate recurring orders. Select Yes/True to see a list of recurring POs.

Change Requests

Change request are used to modify an existing purchase order.

After clicking **Add Filter** on the search screen, enter the **Filter Name** and select the filter to apply it.

Filter Name	Description
Account-SubAccount	The KFS account number(s) used to fund the purchase.
Approved By	This field allows you to search by document approver.
Department	The department associated with the person who submitted the order.
Prepared By	The individual who submitted the change request.
Supplier	The external entity from which goods or services were requested/purchased.
Change Request Status	Filters documents by workflow status. Pending documents are enroute and collecting approval(s), Completed documents have finished routing.
Obj Code	The KFS object code used in the Accounting Codes section.
Org	Returns documents funded by accounts within the chart and org you specify. A way to review activity by a department without entering multiple account numbers.
Org Ref Id	Added in the Accounting Codes section when entering the requisition. Defined by the department.
Project Code	Code established in KFS and added to the Accounting Codes section when entering the requisition.
Submitted Date	Locate change requests submitted within a timeframe you define.
Current Workflow Step	Locate documents in a specific workflow step, such as FO Approval.
Recurring Payment?	Used to locate recurring orders. Select Yes/True to see a list of change requests related to recurring POs.

Receipts

A receipt document is used by departments to verify that goods were received, or services were performed.

Filter	Description
Department	The department associated with the person who submitted the receipt.
Received By	The individual who submitted the receipt.
Supplier	The external entity from which goods or services were requested/purchased.
Receipt Date	Locate receipts submitted within a timeframe you define.

Invoices

Invoice documents are used to review, approve, and ultimately issue payment to suppliers.

After clicking **Add Filter** on the search screen, enter the **Filter Name** and select the filter to apply it.

Filter Name	Description
Account-SubAccount	The KFS account number(s) used to fund the payment.
Approved By	This field allows you to search by document approver.
Department	The department associated with the person who owns the invoice.
Supplier	The external entity to whom payment will be made.
Obj Code	The KFS object code used in the Accounting Codes section.
Org	Returns documents funded by accounts within the chart and org you specify. A way to review activity by a department without entering multiple account numbers.
Org Ref Id	Added in the Accounting Codes section when entering the requisition. Defined by the department.
Project Code	Code established in KFS and added to the Accounting Codes section when entering the requisition.
Current Workflow Step	Locate documents in a specific workflow step, such as Hold for Receiving, Matching Exceptions, or Recurring Payment Review.
Due Date	The date by which payment will be issued. Locate payments which will be made within a timeframe you define.
Paid Date	The date payment was made. Locate payments made within a timeframe you define.
Invoice Owner	Carried forward from the purchase order. The individual who receives notifications about the invoice.
Invoice Source	Identify invoices by how they were generated in BUY.IU, such as Digital Mailroom Import, Supplier Portal, etc.
Invoice Status	Filters documents by workflow status. Pending documents are enroute and collecting approval(s), Completed documents have finished routing.
Mismatch Reasons	Locate invoices which routed to the Matching Exceptions workflow stop for a specific reason, such as No Receipt, Over Price, etc.
Pay Status	Payments associated with invoices with a Pay Status of Payable have not yet been made but will be made by the due date. A Pay Status of Paid represents a payment which has been issued.