Using Document Search in WayneBuy

- Locate the icon
- Select Document Search
In some cases the view of the screen may appear different to the user, which is called **Simple search** and **Advance Search**. In the case of looking for invoice transactions needing involvement of the Invoice Owner or Disbursement staff you would use the **Advance Search view**.
The **Advance Search view** provides you multiple Document Types to search under, Select **Invoices**. Using **invoices** as the document type gives you multiple options to do a search.
The most useful options to utilize are as follow:

- Invoice Owner (recommended if you handle multiple indexes/units)
- Payment Status (In Process and Payable)
- Current Workflow Step (AP Matching Exceptions)
- Custom Fields (Index, Org. Code, Acct. Code and Fund)

After you have made your selections Click GO.
Use the Search Details and Refine Search Results

For Example: Do a search using Payment Status (In Process)

The system will provide a list of invoices.

Using the Refine Search Results you are able to find details relate to the transactions

Under **Current Workflow** the invoice(s) are in several steps, the step needing the Invoice Owner Involvement are:

- AP Matching Exceptions (Receiver Required or Price different my require a COR)
- AP Status Exception (The PO is closed)
- Hold Unit Match (Receiver Required- an email is being sent to the Invoice Owner daily for 10days)