Overview

• This job aid provides tips to using the search functionality in Ignite, specific to the Accounts Receivable Specialist, which includes creating custom searches and searching for items entered by a specific person.
To enhance the search process, consider sorting by the person creating the invoice or receipt. To do this, it is necessary to know their Person Number in Ignite.

I. Navigating to the Directory

1. You can access the Directory section in two ways:
   a. (Option 1) Click the Navigator icon in upper left-hand corner of the Ignite landing page.

   ![Navigator Icon]

   b. Under the Me section, click the drop-down arrow, and select Directory.

   ![Me Section]

   c. (Option 2) Under the Me heading on the home page, select the Directory tile.

   ![Home Page]
2. Searching for Employee Number

1. Enter the employee name in the search bar and click enter on your keyboard. The person’s information will appear. Make note of the Person Number.

3. How to setup a Custom Search for Invoices created by a specific user

1. From the Accounts Receivable module, select Billing. Then, click on the task icon on the right side of the screen and select Manage Transactions.

2. In the Search section, click on Advanced before entering any criteria in the fields.
3. Click on **Add Fields** at the bottom of the page, and then **Created By**.

4. Enter the following in the Search criteria:
   a. **Transaction Source** – select **Manual**
   b. **Created By** – enter the **Person Number** retrieved from the directory.
      i. Click on **Save** at the bottom of the screen.
      ii. Give the search setting a **name**.
      iii. Click **OK**.
      iv. Notice the Search Name is now listed in the top right corner of the field.
   v. Click **Search** at the bottom of the screen.
c. All invoices created by the person selected will now be shown in the results.

d. Click on the transaction number to access the invoice and begin the review and approval process.

4. How to setup a Custom Search for Receipts created by a specific user.

1. From the Receivables module, select Accounts Receivable. Then, click the task icon on the right side of the screen and select Manage Receipts.

2. In the Search section, click on Advanced before entering any criteria in the fields.
3. Click on **Add Fields** at the bottom of the page, and then **Created By**.

4. Enter the following in the Search criteria:
   a. **Receipt Method** – select **Misc. Receipts for a specific area**.
   b. **Created By** – enter the **Person Number** retrieved from the directory.
      i. Click on **Save** at the bottom of the screen.
      ii. Give the search setting a **name**.
      iii. Click **OK**.
      iv. Notice the Search Name is now listed in the top right corner of the field.
   v. Click **Search** at the bottom of the screen.