

Searching for Invoices (Voyager)

Scope: *Acquisitions staff use this procedure as a guideline for searching invoices and line items and displaying purchase order information, including the purchase order itself, from invoice line items.*

Contact: [Lisa Maybury](#)

[Searching for a Particular Invoice Record](#)
[Searching for Invoice Line Items](#)
[Displaying the Purchase Order from an Invoice Line Item](#)
[Displaying the Purchase Order\(s\) from an Invoice Record](#)

Searching for a Particular Invoice Record

Voyager allows you to search for an invoice record using a variety of search keys. To search for an invoice in Acquisitions, click on the tool bar search icon (magnifying glass) and select **Invoice**. The **Find Invoice** window displays.

1. Select a **Search by** term from the drop down menu. The following searches are offered:

Search Name	Comments
Invoice Number	The vendor's invoice number is also the Voyager invoice number
PO Number	
Vendor Name	The Vendor name of vendors loaded into Voyager from Notis is derived from the Notis Vendor Sort field
Voucher Number	Voucher ID field
Vendor Code	
Fund Name	
Ledger Name	CUL has one ledger called <i>CUL FY01</i>
Status	Invoice status; choose "Pending," "Approved," "Complete," or "Canceled" from drop down menu
Status Date	Date of the last invoice modification. Open the ellipsis and select a date using the calendar
Bill to location	
Currency Code	Only US\$ in CUL
Bibliographic Info	Standard Voyager search window appears
Bib Record Number	
Expenditure Date	Date of our Cornell check; will not appear unless we have input it
Check Number	Number of our Cornell check; will not appear unless we have input it
Invoice Note	Case-insensitive search for information anywhere in the Invoice Note; choose condition <i>keyword</i>
Line Item Note	Case-insensitive search for information anywhere in the Line Item Note; choose condition <i>keyword</i>
Operator ID	Your Voyager sign-on
Create Date	The date the invoice was created; open the ellipsis and select a date using the calendar

2. You can narrow or broaden your search by selecting an operator (AND, OR, NOT) in the Operator field and selecting from the *search by* list again on the next line.
3. Click **FIND** to execute the search.
4. Search Results window will display all invoices which matched your search. Window contains: Invoice Number, Vendor Name, Invoice Status, and Invoice Date.
5. Highlight invoice(s) and double click or click OK to open. (Press Ctl-s to select more than one invoice.)

Searching for Invoice Line Items

You can search for individual line items on an invoice of any status. This technique is useful for locating a particular line item on an invoice which has many line items.

1. Search for and open an invoice.
2. Select **Search** from **Line Item** menu.
3. **Find Invoice Line Items** dialog box displays.
4. You can search by:

Search Name	Comments
PO Number	
Fund Name	
Ledger Name	
Intended Location	Choose from drop down menu
Line Item Type	Choose from drop down menu
Invoice Line Item Status	Choose <i>Invoiced</i> or <i>Invoice Pending</i> from drop down menu
Bibliographic Info	Standard Voyager Search window appears
Bib Record Number	
Line Item Note	Case-insensitive search for information anywhere in the Line Item Note; choose condition <i>keyword</i>

5. You can narrow or broaden your search by selecting an operator (AND, OR, NOT) in the Operator field and selecting from the search by list again on the next line.
6. Click **FIND** to execute the search.
7. The text of the line item which is found by the search will change to a bright pink color.

Displaying the Purchase Order from an Invoice Line Item

You can display the purchase order for an invoice line item directly from that invoice line item.

1. Arrow to invoice line item.
2. Tab to **Order Number** field.
3. Open ellipsis (**F4**) and you will be taken to the related purchase order.
4. Open the Windows drop down menu (type **ALT-w**), arrow down to the Invoice <no.> and click to return to the Invoice.

Displaying the Purchase Order(s) from an Invoice Record

You can display the purchase order or orders for all records which are on an invoice record through use of the Invoice menu.

1. Open the **Invoice menu** on the Menu bar.
2. Select **Related ?**
3. A box labeled "Information related to Invoice: [number]" opens. The numbers of all purchase orders which are associated with this invoice are displayed in the box.
4. Open the ellipsis next to the purchase order number to view the purchase order. Return to the invoice by selecting the invoice under the Windows menu.