

An aerial photograph of a vast, snow-covered landscape. A road with two lanes and a center line winds through the snow, leading towards a large body of water in the distance. The sky is a clear, bright blue. The overall scene is serene and expansive.

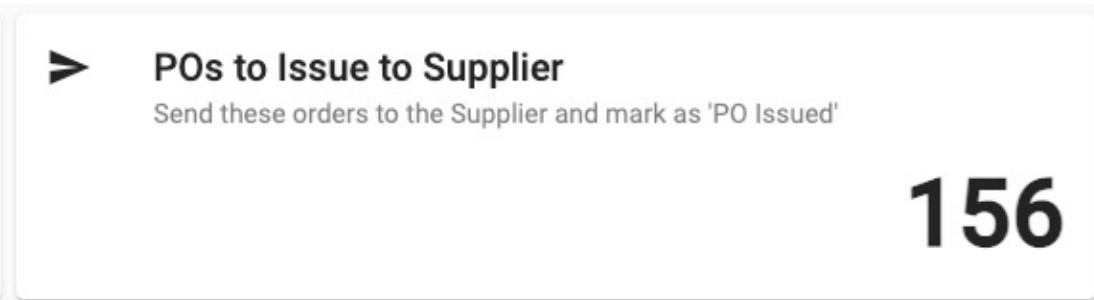
Create Search Cards



GARNER

Search Cards in Lighthouse are a set of saved search criteria that remain on each User's Home Screen dashboard.

They can be created and edited by you, the User, to show you the exact information you require. When added to your screen, they will look like the below image.



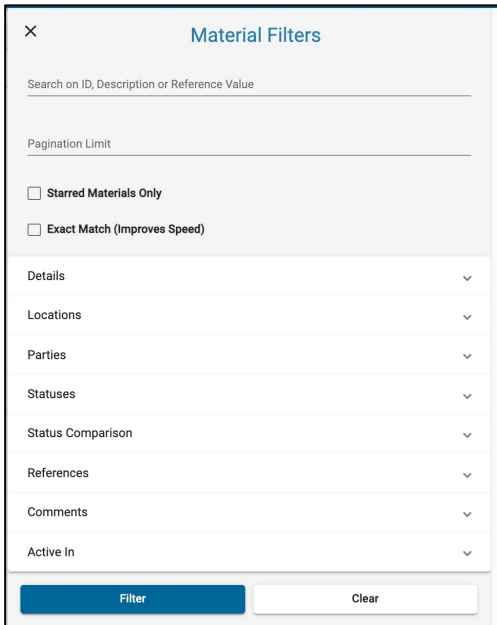
Clicking on each card will bring you to the list of materials or transfers that fulfill the cards' specific requirements.

For this example, the card is showing a particular Buyer's PO Lines that need to be issued to the supplier.

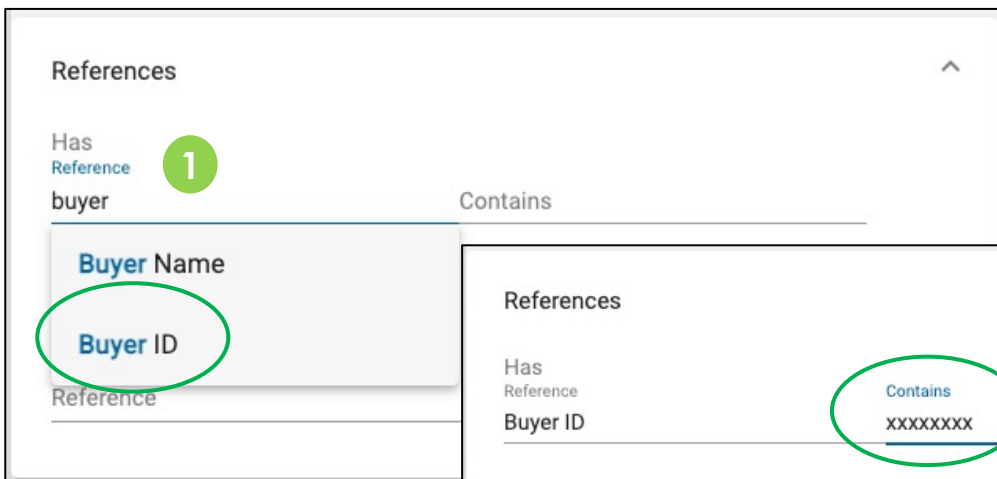
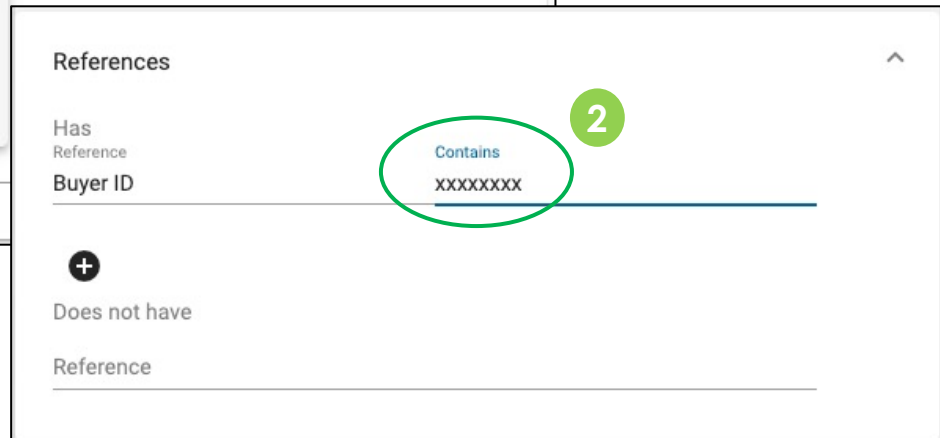
1. Log in to the Garner system
2. Navigate to the Materials or Transfers screen
3. Locate search icon in bottom right corner and click



4. Detailed search will open on the right side of screen

A screenshot of the 'Material Filters' dialog box. It features a search bar at the top with the placeholder text 'Search on ID, Description or Reference Value'. Below the search bar is a 'Pagination Limit' field. There are two checkboxes: 'Starred Materials Only' and 'Exact Match (Improves Speed)'. A list of filter categories is shown with dropdown arrows: Details, Locations, Parties, Statuses, Status Comparison, References, Comments, and Active In. At the bottom, there are 'Filter' and 'Clear' buttons.

5. Add all needed criteria to create a card. For this example, the first step is to add the Buyer ID reference by selecting 'Buyer ID' from the reference drop-down and adding in the value of the ID

A screenshot of the 'References' dialog box. The 'Has Reference' section is active, with a green circle containing the number '1' next to it. The text 'buyer' is entered in the input field. Below the input field, a dropdown menu is open, showing 'Buyer Name' and 'Buyer ID'. 'Buyer ID' is circled in green.A screenshot of the 'References' dialog box. The 'Contains Reference' section is active, with a green circle containing the number '2' next to it. The text 'Buyer ID' is entered in the input field, and 'XXXXXXXX' is entered in the value field. Below the input fields, there is a '+' icon and the text 'Does not have Reference'.

- The next criteria to add is the Status information. This ensures that the Card will be searching for materials that have been created but not yet issued to the supplier. The search will be looking for **1** Attained 'PO Created' status and **2** Never Attained 'PO Issued to Supplier'

Statuses ^

Attained **1**

PO Created ✕

From 📅 To 📅

Not Attained After

Never Attained **2**

PO Issued to Supplier ✕

Forecasted

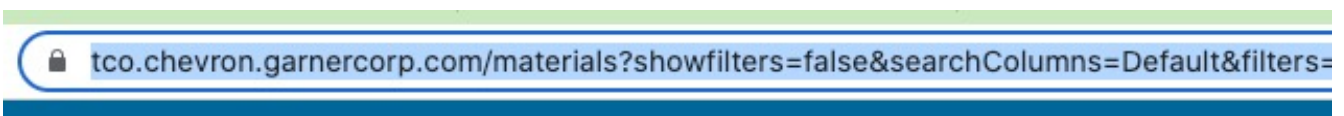
+

Never Forecasted

- Once the search criteria are added, select the 'Filter' button

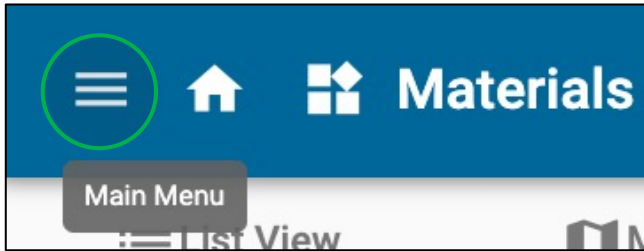


- After the results have loaded, copy URL from web browser

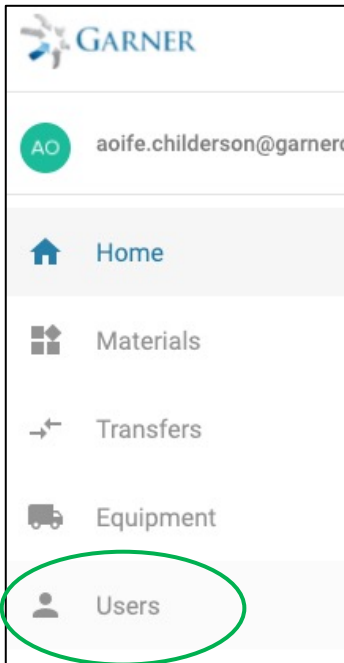




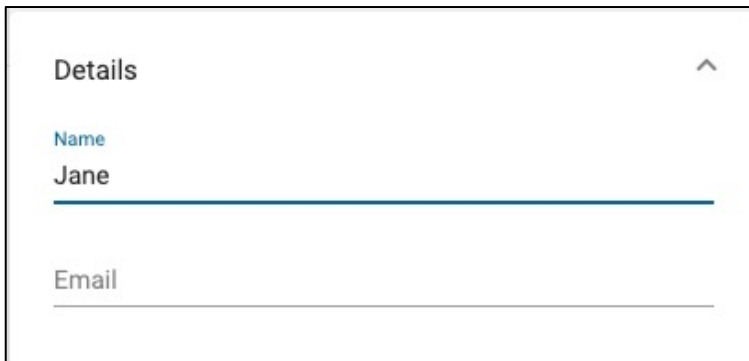
8. Click on the “Main Menu” on the top left-hand corner of the screen



9. Select the “Users” page on the menu

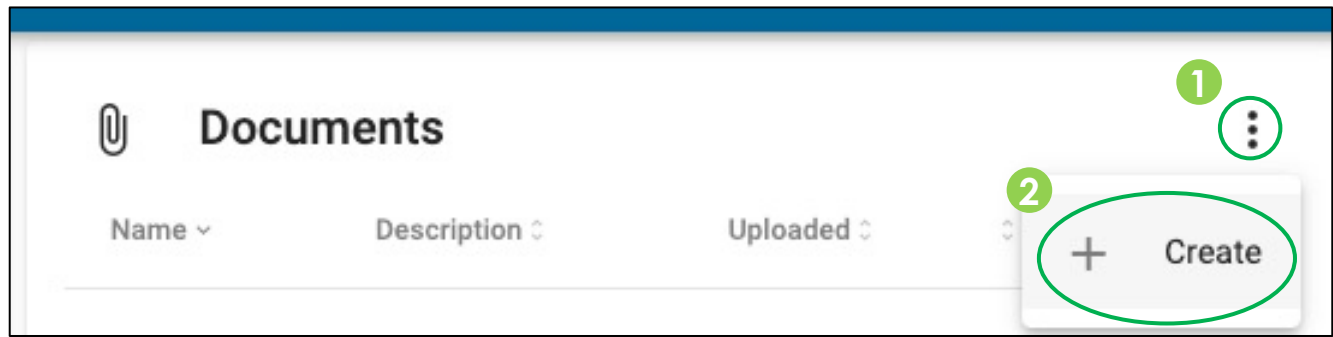


10. Locate your User page by searching for your name or email address and click the ‘Filter’ button

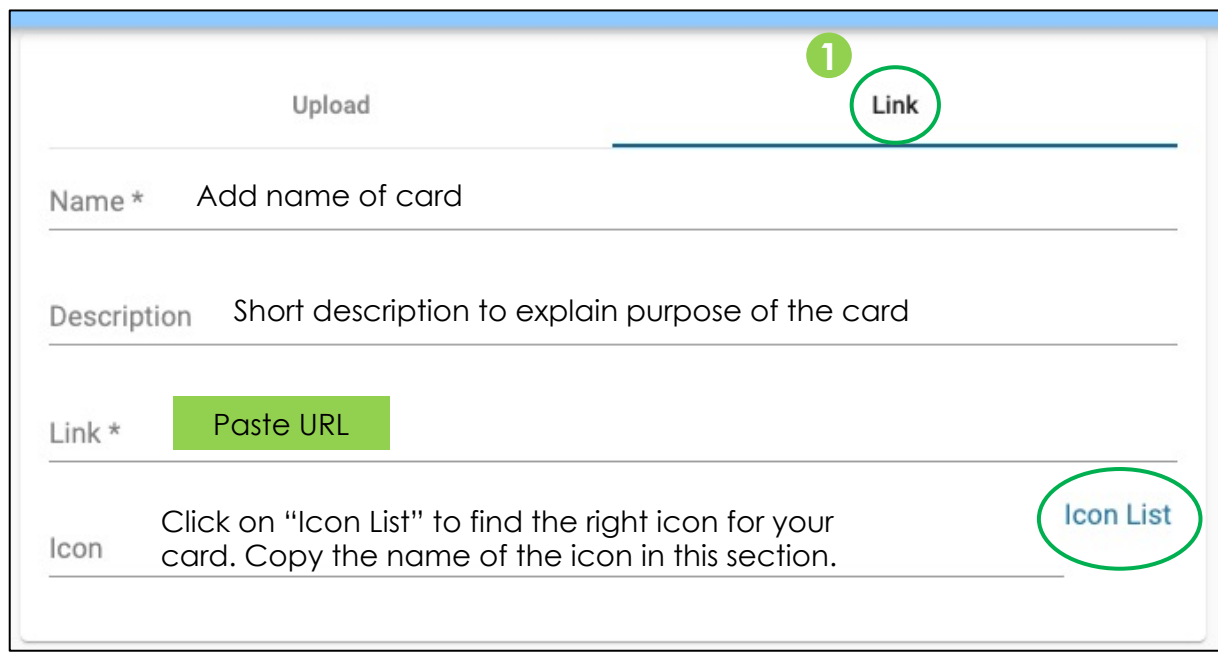


11. Select your User from the list of results by clicking on your name. This will bring you to your individual ‘User’ page

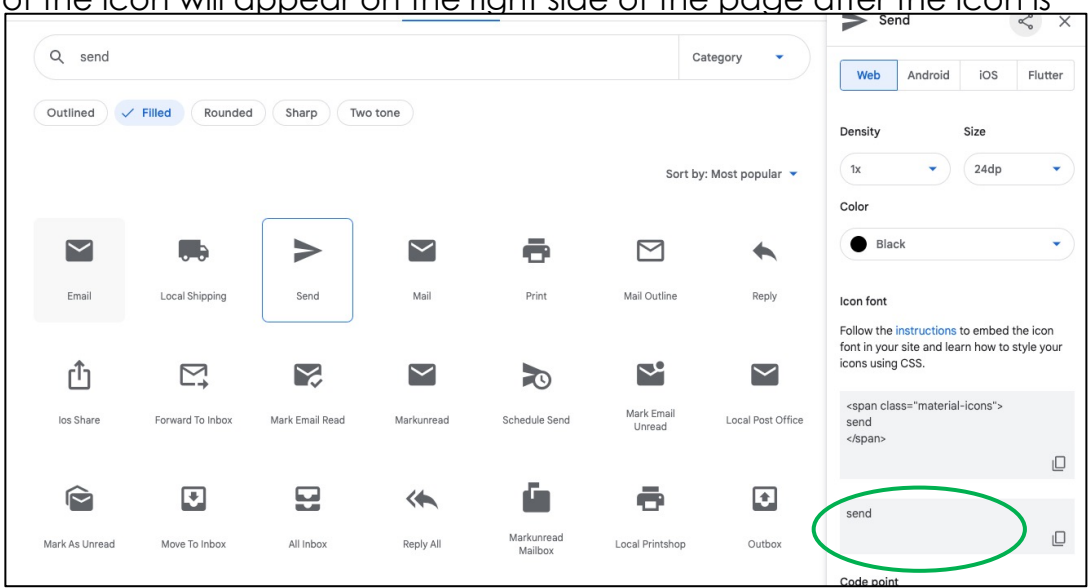
12. Under the 'Documents' sections, click the three dots and then select "Create"



13. Click on "Link" text



14. The name of the icon will appear on the right side of the page after the icon is selected



15. After adding in the details – you can manually edit the URL so the Search Filters will not open every time you click on the search card. Change 'true' to 'false'

Name *

POs to Issue to Supplier

Description

Send these orders to the Supplier and mark as 'PO Issued'

Link *

tco.chevron.garnercorp.com/materials?showfilters=true&searchColumns=Default&filters=%

Icon Icon List

send

Name *

POs to Issue to Supplier

Description

Send these orders to the Supplier and mark as 'PO Issued'

Link *

tco.chevron.garnercorp.com/materials?showfilters=false&searchColumns=Default&filters=

Icon Icon List

send

16. Click on the check icon on the top right section of screen to save card



17. Search card will now be visible in the 'Documents' section. When you go back to the "Home" screen, card will be visible.

