



Quick

Reference

Guide

## Using Document Search



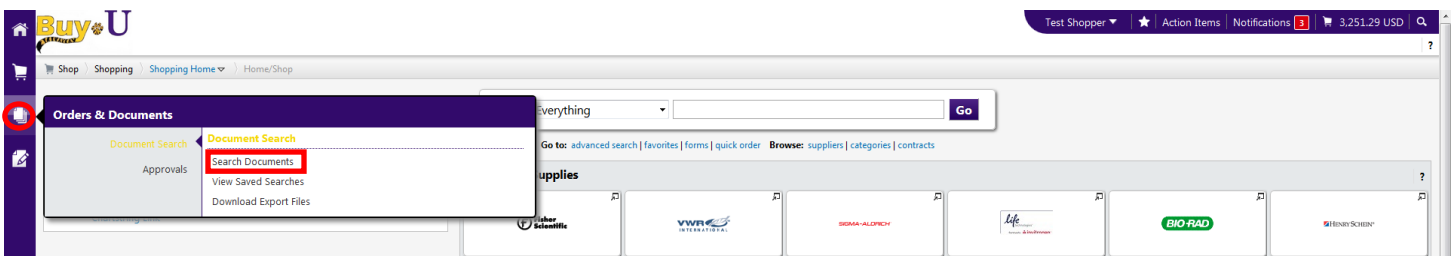
### In This Guide

- ✓ Getting results with document search
- ✓ Filtering document search results
- ✓ Exporting search results
- ✓ Saving searches

This guide demonstrates how to use the document search function and how to filter, save, and export your document search results.

### Procedure

1. Access document search by selecting the **Orders & Documents** icon from the navigation bar on the left side of the screen within **BUY-U**.



2. Select **Document Search → Search Documents**
3. Specify search criteria in the search field by:
  - Selecting an option from the document type drop-down list.
  - Entering document number or keyword in search field
  - Select a date option from the dates drop-down list.

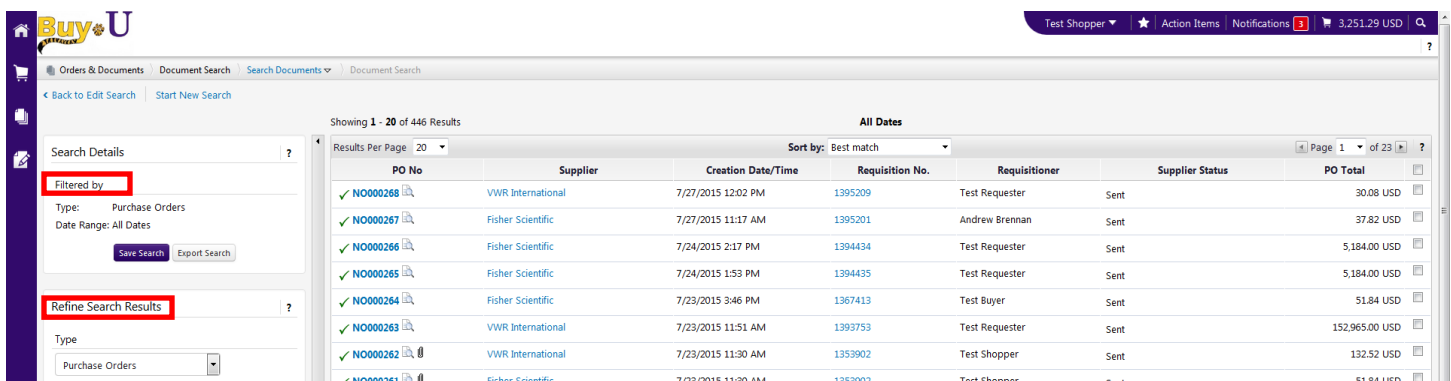
Search

Enter search terms such as document numbers, suppliers, and product information.

Go to: [advanced search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

**Note:** Leaving the search field blank will return all documents. Additional search fields are available by clicking on the **advanced search** link.

4. Click the **Go** button.
5. The results for your search criteria will then appear on-screen. The **Filtered By** box on the left side of the screen displays the current filters in place. Beneath that box, additional filtering options are available in the **Refine Search Results** box.



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- Possible filters are listed in the lower portion of the **Refine Search Results** box, with the number of occurrences for each filter value shown in parentheses.
- Click on a single entry if you want to filter the search results by just that value.
- Click on the **more** link to display additional filtering values.
- Clicking on the **Filter Plus** icon allows for more than one entry to be included in the filter.

**Custom Fields**

Account	Is Exactly	<input type="text"/>	<a href="#">Add another Account</a>
<small>Select from all values...</small>			
Home Department	Is Exactly	<input type="text"/>	<a href="#">Add another Home Department</a>
<small>Select from profile values...</small>			
Speedchart	Is Exactly	<input type="text"/>	<a href="#">Add another Speedchart</a>
<small>Select from all values...</small>			
Class	Is Exactly	<input type="text"/>	<a href="#">Add another Class</a>
<small>Select from all values...</small>			
Dept	Is Exactly	<input type="text"/>	<a href="#">Add another Dept</a>
<small>Select from all values...</small>			
Fund	Is Exactly	<input type="text"/>	<a href="#">Add another Fund</a>
<small>Select from all values...</small>			
Program	Is Exactly	<input type="text"/>	<a href="#">Add another Program</a>
<small>Select from all values...</small>			
Project	Is Exactly	<input type="text"/>	<a href="#">Add another Project</a>
<small>Select from all values...</small>			

[Go](#)

**Refine Search Results** ?

Type

Date Range

Workflow Status

[Completed \(445\)](#)  
[Pending \(1\)](#)

**Refine Search Results** x

Supplier

[Office Depot \(229\)](#)  
[VWR International \(52\)](#)  
[Fisher Scientific \(51\)](#)  
[W.W. Grainger, Inc. \(21\)](#)

Current Workflow Step

[Send PO to PeopleSoft \(1\)](#)

Prepared By

[Test Requisitioner2 \(173\)](#)  
[Test Requester \(100\)](#)  
[Tonya McBride \(62\)](#)  
[David Joyner \(48\)](#)

Owner

[Test Requisitioner2 \(167\)](#)  
[Test Requester \(82\)](#)  
[Tonya McBride \(63\)](#)  
[David Joyner \(48\)](#)

[Alice Approver \(1\)](#)  
[Ann Lehw \(12\)](#)  
[Carmen Harold \(1\)](#)  
[Danielle Burlison \(1\)](#)  
[David Joyner \(48\)](#)  
[Frederick Lutz \(6\)](#)  
[Judith Arseneaux \(1\)](#)  
[Karen Jorgenson \(1\)](#)  
[Kelly Creech \(2\)](#)  
[Kyle Walker \(1\)](#)  
[Marty Grow \(4\)](#)  
[Michael Breeding \(2\)](#)  
[Patricia D'Arensborg \(1\)](#)  
[Rayza Carballo \(1\)](#)  
[Requisitioner Requisitioner \(1\)](#)

[Ricky Requestor \(6\)](#)  
[Stephanie Laurent \(2\)](#)  
[Test Approver \(4\)](#)  
[Test Buyer \(6\)](#)  
[Test Requester \(100\)](#)  
[Test Requisitioner1 \(8\)](#)  
[Test Requisitioner2 \(173\)](#)  
[Tonya McBride \(62\)](#)  
[Viktoriya Kurganov \(1\)](#)  
[William Myers \(1\)](#)

[Save](#) [Close](#)

[\[more\]](#)

- When selecting multiple options, enter the criteria or click the checkbox next to each of the filtering options you want to use, and then click the **Go** button.

**Custom Fields**

Account	Is Exactly	<input type="text" value="549200"/>	<a href="#">Add another Account</a>
<small>Select from all values...</small>			
Home Department	Is Exactly	<input type="text"/>	<a href="#">Add another Home Department</a>
<small>Select from profile values...</small>			
Speedchart	Is Exactly	<input type="text" value="0663000001"/>	<a href="#">Add another Speedchart</a>
<small>Select from all values...</small>			
Class	Is Exactly	<input type="text"/>	<a href="#">Add another Class</a>
<small>Select from all values...</small>			
Dept	Is Exactly	<input type="text"/>	<a href="#">Add another Dept</a>
<small>Select from all values...</small>			
Fund	Is Exactly	<input type="text"/>	<a href="#">Add another Fund</a>
<small>Select from all values...</small>			
Program	Is Exactly	<input type="text"/>	<a href="#">Add another Program</a>
<small>Select from all values...</small>			
Project	Is Exactly	<input type="text"/>	<a href="#">Add another Project</a>
<small>Select from all values...</small>			

[Go](#)

## Using Document Search



11. Searches can be saved by clicking the **Save Search** button in the **Filtered By** area.

The screenshot shows the Buy@U Document Search interface. On the left, the 'Search Details' panel has a 'Filtered by' section with 'Type: Purchase Orders' and 'Date Range: All Dates'. Below this is a 'Speedchart' section with checkboxes for 'Is Exactly: 0663000001' and 'Is Exactly: 549200'. The 'Save Search' button is highlighted with a red box. The main table displays search results with columns: PO No, Supplier, Creation Date/Time, Requisition No., Requisitioner, Supplier Status, and PO Total. The table shows 7 results, with the first row being PO No. NO000268 from VWR International.

12. When the **Add to Saved Searches** pop-up window appears, enter a **Document Search Nickname**, select a destination folder, and then click the **Save** button.

The 'Add to Saved Searches' pop-up window is shown. It has a title bar with a close button. The first step is 'Step 1: Edit Saved Document Search Details', which includes a 'Nickname \*' text box and an 'Add Description' link. The second step is 'Step 2: Select Destination Folder', which includes an 'Add New' button and a list of folders: 'Personal' (with 'Shopper Test - Personal Folder') and 'Shared' (with the message 'You have no shared favorites.'). At the bottom, there is a '\* Required' label and 'Save' and 'Close' buttons.

13. Click **Close** on the confirmation pop-up window.
14. Search results can be exported by clicking the **Export Search** button in the **Filtered By** area.
15. When the **Request Export** pop-up window appears, enter a **File Name**, select an **Export Type** from the drop-down list, and then click the **Submit Request** button.
16. Pending and completed exports are available in **Orders & Documents** → **Document Search** → **Download Export Files**.

**You have successfully used the document search function and optionally saved or exported your search results.**