Document Search

The Document Search feature provides an efficient way to locate documents within TechBuy for review and processing. Document Search allows you to search across multiple documents using a simple entry text box. Additional search features include filtering options, date range options, and advanced search features.

Documents include purchase requisitions, purchase orders, invoices, and receipts. The data included in the Document Search results will vary based on the document type. The document types available for searching are dependent on your permissions. For example, if you do not have permission to view invoices, then you will not see that document type as an option.

There are three ways to use Document Search within TechBuy:

- Quick Search – allows you to perform a variety of searches from anywhere within the TechBuy application by selecting what you are looking for from a drop-down menu and entering a number or keyword information. With the search fields readily available in the application header, it is no longer necessary to navigate to specific screens to run the desired search.

- Simple Search – there are three main selections available in Simple Search:
  - What type of document do you want to search?
  - What are you looking for?
  - What dates do you care about?

- Advanced Search – allows you to enter very specific detailed search criteria and offers you the ability to pre-define the search criteria.

Quick Search

To conduct a Quick Search from the Shopping Home Page, select from the following Options using the drop-down menu:

- All
- Contract
- Document
- Invoice Number
- Purchase Order Number
- Form Request Number
- Receipt Number
- Requisition Number
- Sourcing Event
- Supplier Invoice Number
- Supplier Profile
Next, enter a **number** or **keyword information** in the textbox and click the **Search icon** or press **Enter**.

The results from the Quick Search are now within the Document Search feature. Use the scroll arrows to view each item. Click **Back to Search Results** to view the list of search results. You may use the Post-Search filters displayed on the left side of the screen to narrow the document search results. The filter criteria available will depend on the type of document you are searching for. Post-Search filters will be explained in more detail in the Simple Search section.
To access Document Search, click **Orders** from the left navigation menu on the Shopping Home Page, and then click **Search Documents**.

### Simple Search

Simple Search looks for documents based on:

- Document Type
- Search Terms
- Date Range

When conducting a simple search using the Document Type, select the type of document you want to search for using the drop-down list. The Document Types include All Documents, Requisitions, Purchase Orders, Invoices, Receipts, Form Requests, and Sourcing Events. The Document Search Feature will default to search All Documents.

Click the down arrow in the Document Search box and select the **Document Type** you want to search. Click **Go** or press **Enter** to view the results.
When using Search Terms, enter the **Search Term(s)** you are looking for in the search textbox. You can enter exact or partial values for keywords, numbers, supplier information, and so forth.

- **Wildcard** – There is no need to type a wildcard character for partial number searches. Only type the digits that are known.
- **Ends With** – The number begins with alpha characters and ends with 7529 – just type in 7529. All documents containing that set of numbers will be returned.
- **Starts With** – Enter the beginning two letters and all documents beginning with those two letters will be returned.
- **“And” Search** – You may also enter a combination of the above fields and the search will treat it as an “AND” search.

The following fields are searchable:

- **Requisition Number**
  - If the requisition also has a related PO number, both the requisition and the PO will be returned. Invoices related to the PO do not have a data relationship to the requisition and are not returned.
- **Purchase Order Number**
  - Purchase orders have a relationship to the following document types: requisitions, receipts and invoices. Searching by the PO number will give you the best picture of related documents.
- **Invoice Number**
  - A search by invoice number may return the invoice and any related purchase orders. It will not return requisitions related to invoiced purchase orders.
- **Supplier Invoice Number**
- **Contract Number**
- **Catalog Number**
- **Requisition Name**
- **External Requisition Number**
- **Supplier Name**
- **Participant: Username, First Name, Last Name, Email Address**
- **Invoice Name**
- **Product Description**
  - You do not have to enter the exact product description. For example, enter “beaker” in the search terms field and all documents containing beaker will be returned.
- **Form Name**
- **Manufacturer Name**
- **Receipt Number**
- **Receipt Packing Slip Number**
- **Receipt Tracking Number**
- **Receipt Name**
Enter the information in the search textbox and click **Go** to view the results.

![Search Interface]

From the drop-down box, select the relative Date Range. The relative Date Range may be selected prior to running a search, or after the search results display, you can filter the search results by a different Date Range to narrow down or expand a search. The Date Range will default to All Dates if no other range is selected.

Date range selection can occur five different ways from a drop-down menu that includes:

1. **Other**
   - Custom Date Range
2. **Days** – Searches all documents in a selected range of calendar days.
   - Last 7, 30, 60, 90, 120 days
   - Yesterday
   - Today
   - Last Week
   - This Week
3. **Calendar** – Searches documents based on a calendar range.
   - Month-To-Date
   - Last Month
   - Year-To-Date
   - Previous Year
4. **Fiscal** – Searches documents based on the fiscal year (FY).
   - Fiscal Year-To-Date
   - Previous Fiscal Year
5. **Other**
   - Before X Date
   - After X Date
   - Last X Days
   - Next X Days
   - Before the Last X Days
   - After the Last X Days
   - From X Days Through Y Days Ago
Select the **Date Range** from the drop-down menu, and click **Go** to view the results.

Documents can be viewed from the search results by clicking the **Document Number**.

Once you have opened the document, you can navigate to other documents within your Document Search results using the scrolling feature at the top of the screen. You will stay on the document in edit mode without ever having to return to your Document Search results.

You can also access a specific document from a drop-down menu on the top right of the screen. If you want to return to your search results, click the **Back to Search Results** link in the top left of the screen.
Post-Search Filter Options

With Document Search, filter options are available after performing your initial document search that allow you to define additional criteria and further narrow down the search results. As you select the available filters, the search results set are narrowed and the Search Details section is updated with the chosen search criteria. This helps you understand the results set and make changes if needed.

For example, if you perform a search for Requisitions, you can use the Post-Search Filter Options and narrow your search By Department. You can remove Post-Search Filters from the Search Details section by clicking the [remove all] link or by deselecting the checkbox of the filter (i.e. By Department). This will expand the results based on the criteria removed.

Post-Search Filter Options change based on the document type you are searching for. For example, if you perform a PO search your filter options will be PO specific and will look different from the filter options if you do a PR search. Using the Magnifying search icon located to the right of the field, you are allowed to select multiple search filter options and use filters in conjunction with one another. For example, you can select two suppliers and two departments at the same time.

Examples of Post-Search Filter Options include:

- Type
- Date Range
- Business Unit
- Department
- AP Status
- Approved By
- Supplier
- Custom Fields
- Workflow Status
- Form Type
Types of Document Searches

- Matching Status
- Invoice Status
- Receipt Status
- Prepared By
- Owner
- Status Flags
- Product Flags

The Search Details section and Post-Search Filter Options will display on the left side of the search results page.

Editing and Starting a New Search

Links available at the top of the search results screen allow you to edit your search or start a new search.

- Edit Search – if you have performed a search, then click Back to edit search. You are taken back to the search screen and your entire search criteria will be pre-populated in the appropriate fields. You do not have to start over.
- Start New Search – after performing a search and selecting various post filters, if you decide you want to start over, click the Start New Search link.

After running a search, Document Search will remember where you initiated your last search and return you to the same page the next time you click the Document Search tab. The system does not remember the parameters you last keyed in. If you want to go to a different page than where you last were, links are available to take you to other document types and/or to the simple or advanced search pages.
My Requisitions, My Purchase Orders, and My Invoices

Within Document Search, there are links for advanced search, my requisitions, my purchase orders, my invoices, and my forms. Using these links allows you to take advantage of the relative date ranges and the Post-Search Filter Options that are available. The default date range for these links is 90 days. You will only see links and documents that you have access to. For example, if you do not have permission to view invoices, you will not see the my invoices link.

To access these features, click the Go to: links from the Document Search page.
Advanced Search

Advanced Search is one of the three ways to search for a document within TechBuy. Advanced Search offers you the option to enter very specific, detailed search criteria. You can search across multiple documents or select a specific document type. You will still only be able to search and view documents you have access to. As you select different document types, the Advanced Search fields change and are specific to that document type. When you know up front what criteria you are looking for, with Advanced Search you can pre-select that criteria. For example, all Purchase Orders still pending for Fisher but have completed invoices within the last 30 days.

To access Advanced Search, click the Advanced Search link from the Document Search page.

The Advanced Search page will display and allow you to search for a document type from the Search documents drop down menu. The document types include All Documents, Requisitions, Purchase Orders, Invoices, Receipts, Form Requests, and Sourcing Events. The default document type for Advanced Search is All Documents.

The following search criteria are available for All Documents type searches:

- General Document Identification – Enter the document number(s) (Requisition, Purchase Order, Invoice or Receipt).
- Document Information – In this section, you can select and/or enter any specific information related to the document including: Participant(s), Owner, Date, Total Amount, Supplier, Department and Business Unit.
- Item/Product Information – In this section you select and/or enter information related to the items such as: Catalog Number (SKU), Product Description, and Product Flags.

The document number fields including: Document Number, Requisition Number, Purchase Order Number, Invoice Number, and Receipt Number all allow for multiple inputs. You can enter multiple numbers in any of the listed fields and the system will perform an “OR” search and will return results with any of the entered values.

There are a number of user fields available including: Participant, Owner, Prepared For, Prepared By, Approved By, Invoiced By, Invoiced Owner, and Received By that allow you to enter multiple users. When multiple user names are entered, an “OR” search is
performed and will return results with any of the users listed. As you begin typing in a user’s information, it will populate with values matching your entry.

Click the down arrow in the document Search box and select the **Document Type** you want to search.

As you select different Document Types, the Advanced Search fields change and are specific to that Document Type. For example, when you select **Requisitions** as the Document Type to search, the Advanced Search fields that are specific to the requisitions document type will display.

The following fields are available to search:

- **Requisition Identification**
  - Requisition Number – search box
  - Requisition Name – search box
- **Requisition Information**
  - Participant(s) – search box. Participant is any user that has touched the particular document. You may search for participants by their username, first name, last name or email address.
  - Prepared For – search box
  - Prepared By – search box
  - Approved By – search box
  - Sourcing Owner – search box
  - Date – From a drop-down menu, select from Submit Date, Create Date, Complete Date or Purchase Order Create Date. Select date range from a drop-down menu: Days, Calendar, Fiscal & Other
Types of Document Searches

- Total Amount – when searching by the total amount, you can select from three options in the drop-down menu: Is Greater Than, Is Less Than, or Is Between, and enter an amount in the textbox.
- Supplier – search box. Allows you to search by multiple suppliers. By default, only active suppliers will display. To view inactive suppliers, click the magnifying glass to the right of the field.
- Department – search box
- Business Unit – search box
- Item / Product Information
  - Catalog Number (SKU) – search box
  - Product Description – search box. For example, you can search for all orders with green construction paper from Office Depot. Enter “green construction paper” in the Product Description field and Office Depot selected from the Supplier field.
  - Commodity Code – search box
  - Form Name – the form name is an exact match meaning it must be entered exactly as it is in the system. System will not return receipts.
  - Form Type – search box. You may search by multiple from types.
  - Product Flags – you can select one or multiple product flags.
- Contract Information
  - Contract Number – search box
- Purchase Order Identification
  - Purchase Order Number – search box
- Workflow – allows you to search for PR’s, PO’s and Invoices by the current (active) workflow step. You can select multiple steps and search using an “OR” search
  - Current Workflow Step – search box. You can search by one or more.
- Workflow status – make selection from the following check boxes:
  - Completed
  - Pending
  - Rejected
  - Withdrawn
- Sourcing Status
  - Out for Bid
  - Awarded Bid
  - Outstanding Events
- Sourcing Event Status
  - Out for Bid
  - Awarded Bid
  - No Bid Awarded
- Status Flags – make selection from the following check boxes:
  - With Rejected Lines
  - With Withdrawn Lines
  - With Errors
  - With Attachments
  - With Trade-In Items
You can search for documents in Advanced Search by Custom Fields. You can search by custom fields using a span of values functionality that includes “Is Exactly” or “Is Between” or a “Starts With” option.

Searching by Custom Fields is only available from Advanced Search and includes the following fields:

- Advanced Pay
- Buyer Name
- Chart
- Account
- Fund
- Organization
- Program
- Medical/Surgical Supplier Account Code
- Principal Investigator
- Technology Acquisition Business Justification
If you have additional questions, please contact Procurement Services at purchasing@ttuhsc.edu.