Texas Tech University Health Sciences Center
Finance & Administration

Document Search

This chapter will focus on finding documents within TechBuy using the **Document Search** feature. The **Document Search** feature provides an efficient way for you to locate documents in the system 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 purchase orders, then you will not see that document type as an option.

There are three ways to use **Document Search** within TechBuy:

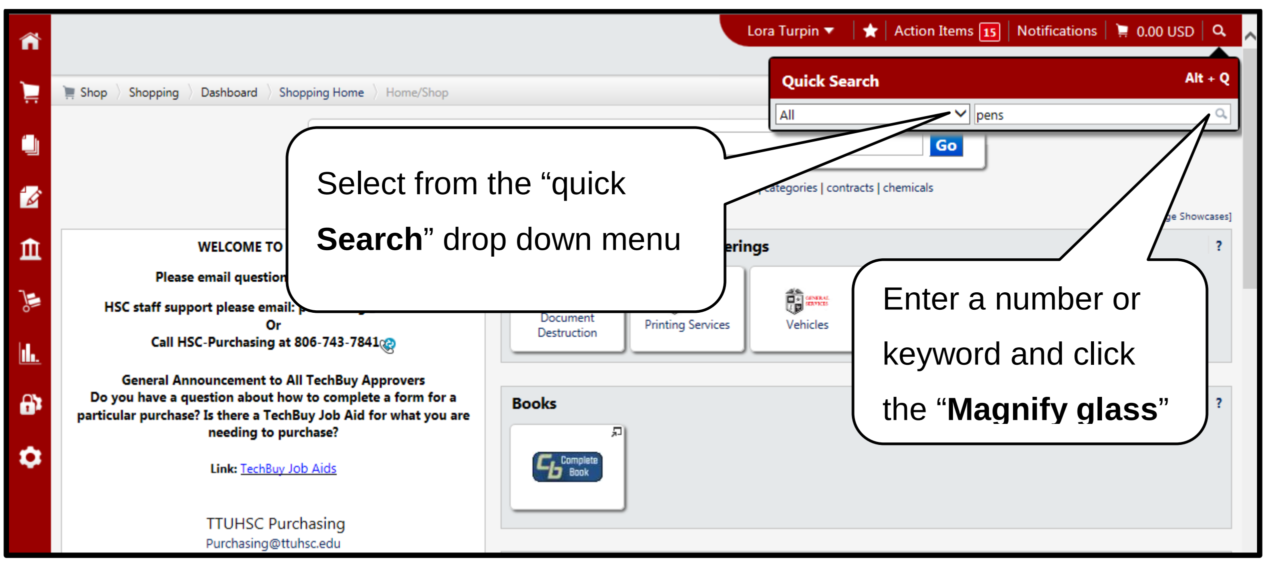
- **Quick Search –** allows you to perform a variety of searches from anywhere within the TechBuy application by selecting what you are looking for from a drop down menu and entering a number or keyword information. With the search fields readily available in the application header, it is no longer necessary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

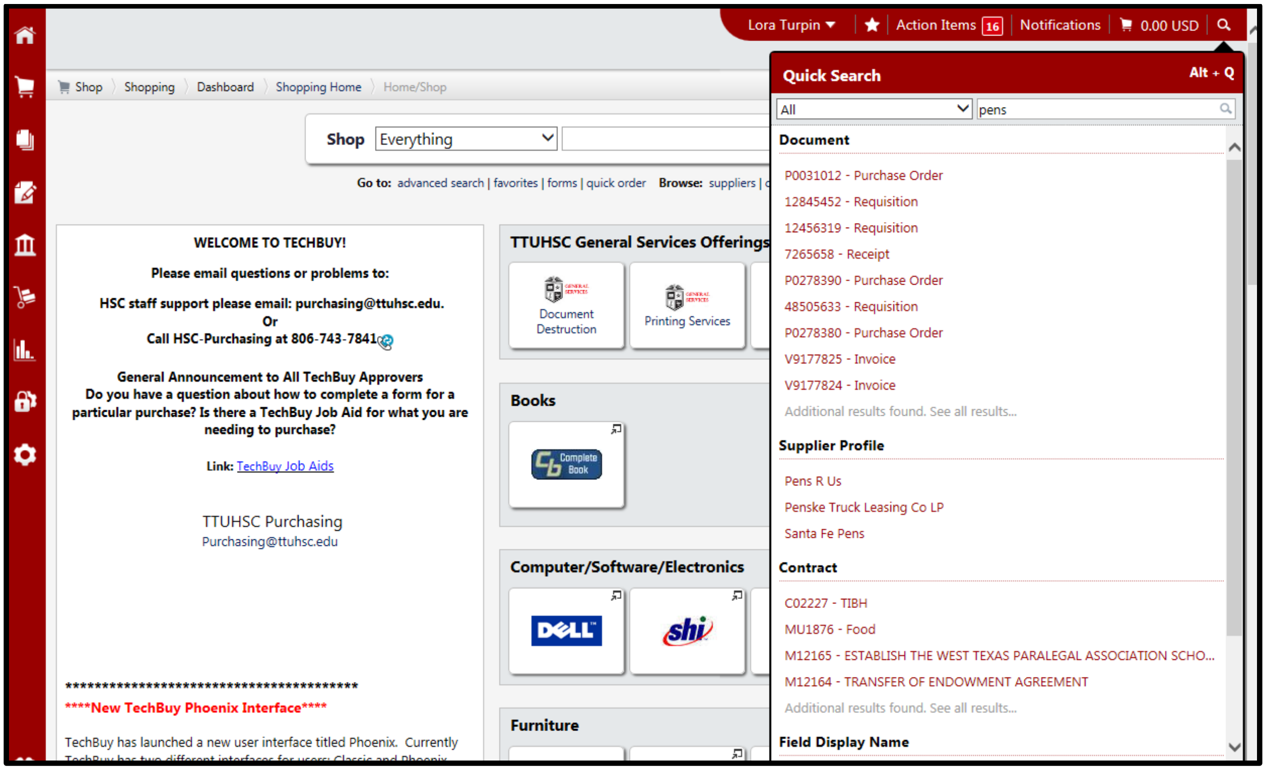
To conduct a Quick Search, from the **"Home/Shop"** page select what you are looking for from the **"Search for"** drop down menu. You can select from the following options:

- All
- Contract
- Document
- Invoice Number
- Purchase Order Number
- Receipt Number
- Requisition Number
- Supplier Invoice Number
- Supplier Profile
- Field Display Name
- User Last Name
- Username
- Help

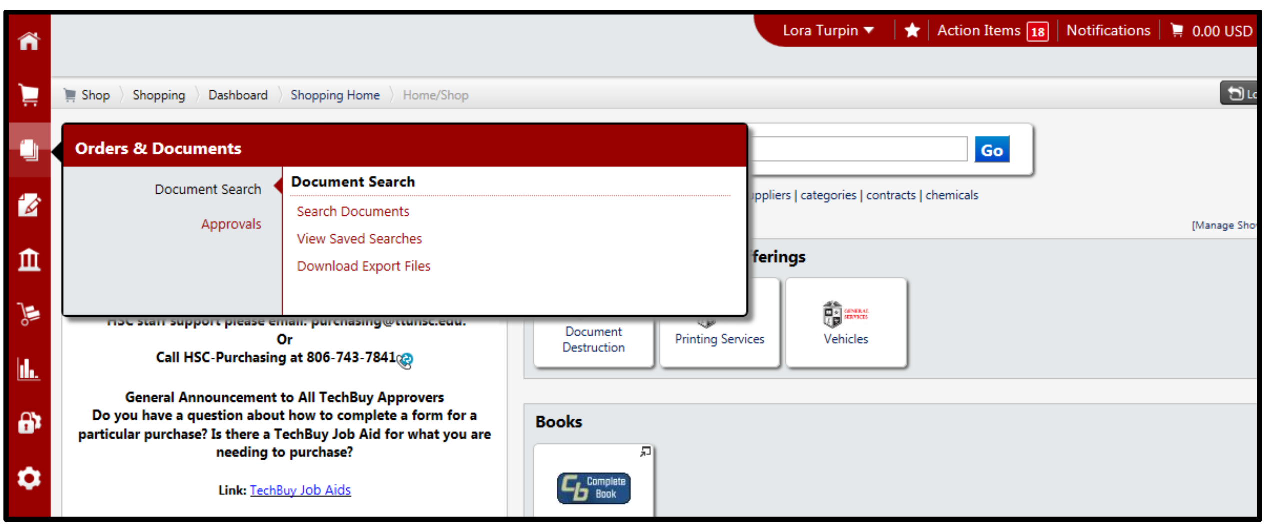
Next, enter a number or Keyword information in the textbox and click on **"Go"** or press Enter on your keyboard.



The results set of the **Quick Search** are now listed below the quick search.



To access **Document Search**, click on **"Orders & Documents", "Document Search",** and **"Search Documents"** from the **Home/Shop** page.

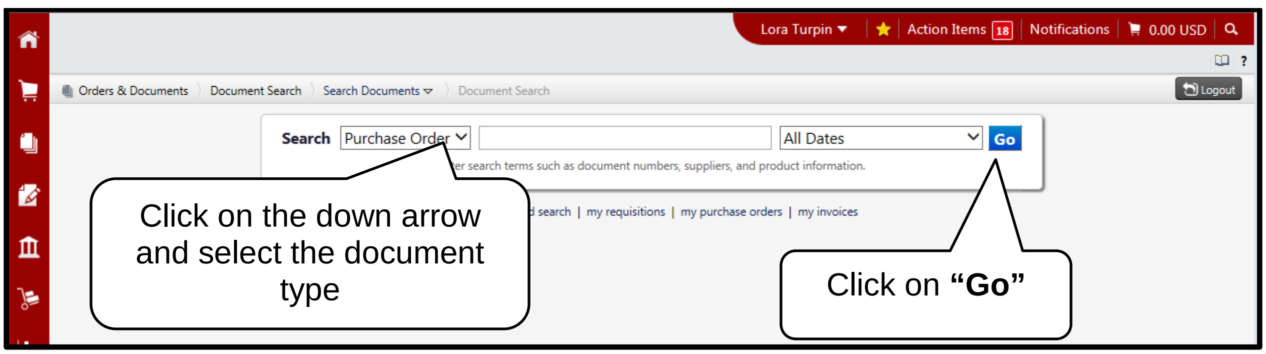


Simple Search

Simple Search searches for documents based on document type, search terms and date range.

Document Type – In the document type drop down, select the type of document you want to search for. The document types include **"All Documents"**, **"Requisitions"**, **"Purchase Orders"**, **"Invoices"** and **"Receipts"**. The document search feature will default to search **"All Documents"**.

Click on the down arrow in the document **"Search"** box and select the document type you want to search. Click on **"Go"** or press Enter on your keyboard to view the results.

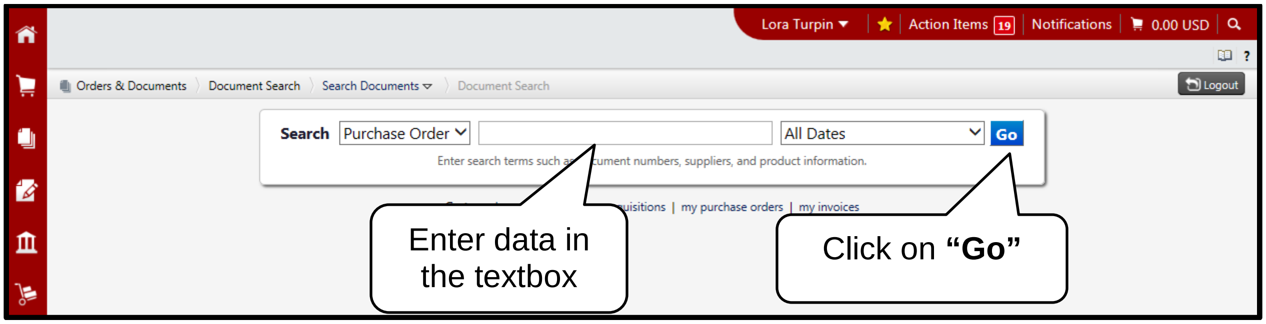


Search Terms – In the search textbox, enter the search term(s) you are searching for. You can enter exact or partial values for keywords, numbers, supplier information, and so forth.
Wildcard - There is no need to type a wildcard character for partial number searches. Only type the digits that are known.
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 on **“Go”** to view the results.



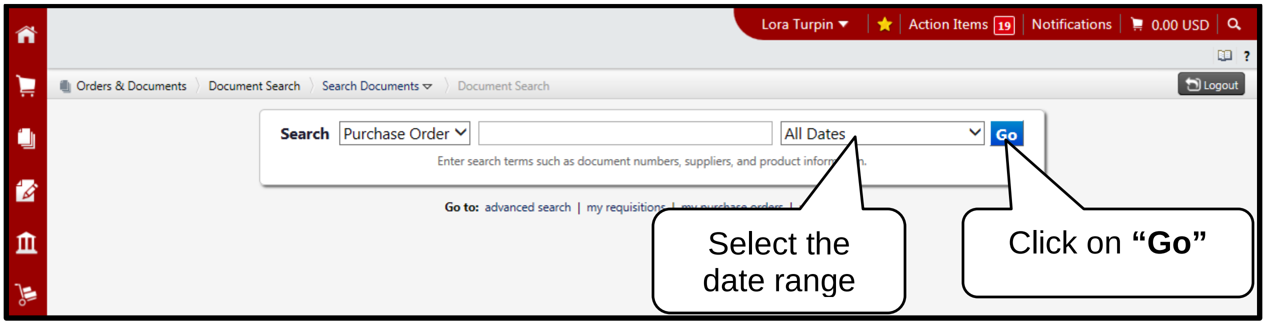
<u>Date Range</u> – From the drop down box, you select the relative date range. The relative date range may be selected prior to running your search, or after the search results display, you can filter your search results by a different date range to narrow down or expand your search. The date range will default to **“All Dates”** if no other range is selected. The **“Custom Date Range”** allows you to enter a Start Date and End Date.

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

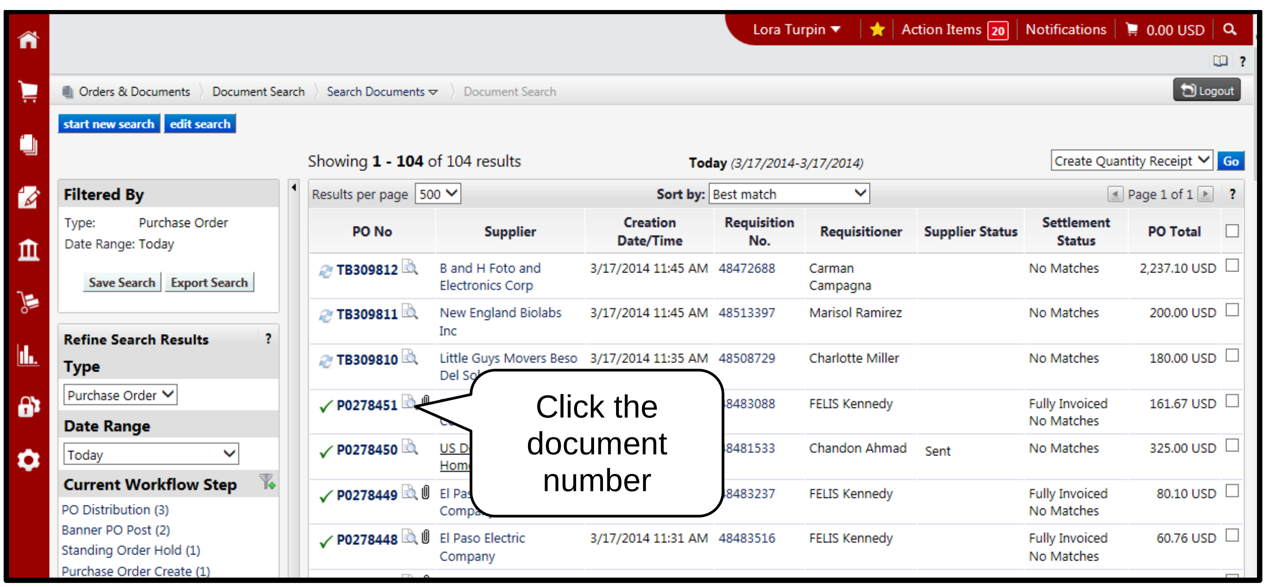
1. **Days** – Searches all documents in a selected range of calendar days.
    - Last 7, 30, 60, 90, 120 days
    - Yesterday
    - Today
    - Last Week
    - This Week
2. **Calendar** – Searches documents based on a calendar range.
    - Month-To-Date
    - Last Month
    - Year-To-Date
    - Previous Year
3. **Fiscal** – Searches documents based on the fiscal year (FY).
    - Fiscal Year-To-Date
    - Previous Fiscal Year
4. **Other**
    - Before X Date
    - After X Date

- Last X Days
- Next X Days
- Before the Last X Days
- After the Last X Days

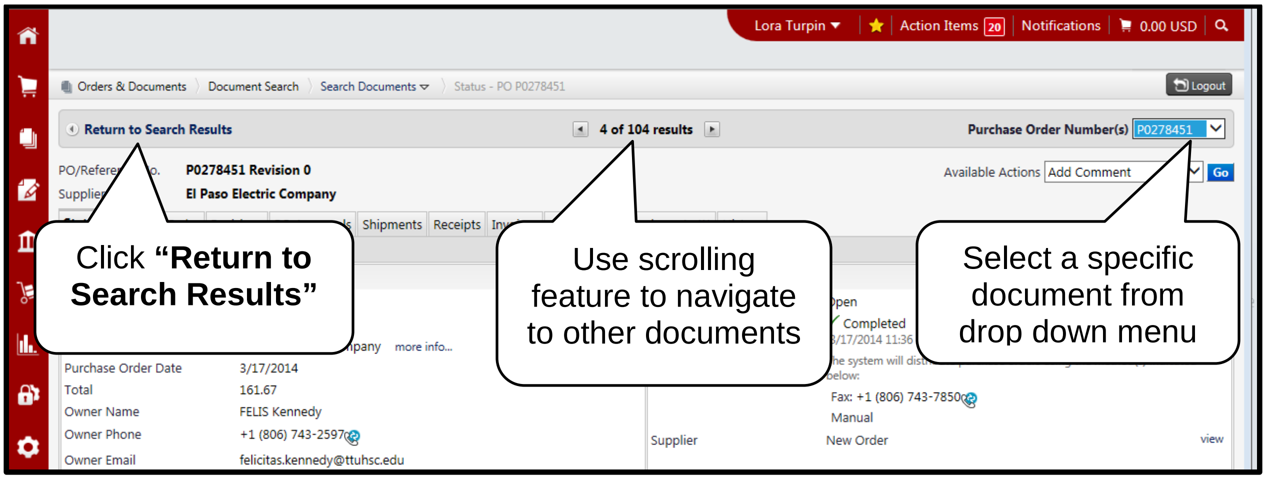
Select the date range from the drop down menu and click on **"Go"** to view the results.



Viewing and Navigating Documents From Search Results – Documents can be viewed from the search results by clicking on 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 on the **“Return to Search Results”** link in the top left of the screen..

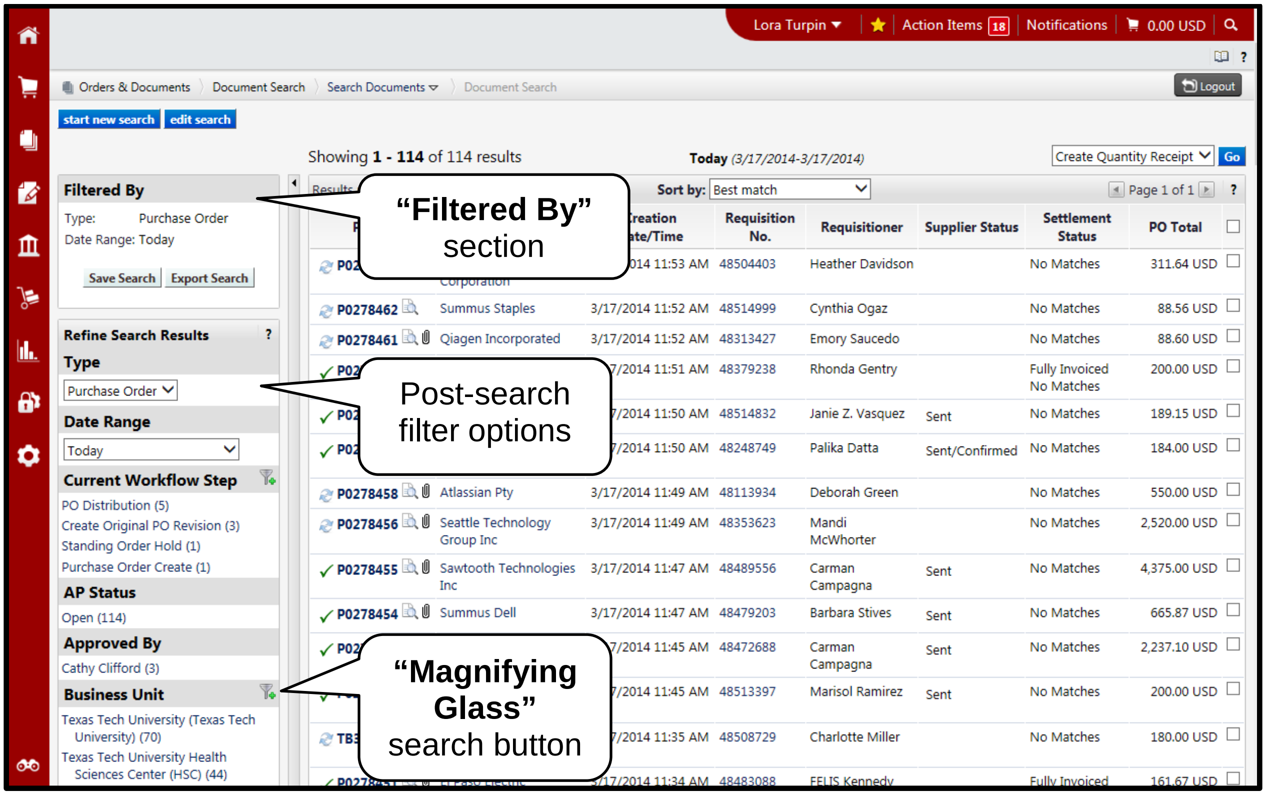


<u>Post Search Filter Options</u> - With **Document Search**, filter options are available after performing your initial document search that allow you to define additional criteria and further narrow down the search results. As you select the available filters, the search results set are narrowed and the **Filtered By** 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 **Filtered By** section by clicking on 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 Glass”** search button 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:

- Date Range
- Department
- Business Unit
- Supplier
- Supplier Status
- User
- Workflow Status
- Status Flags
- Prepared For
- Prepared By
- Approved By
- Product Flags
- Owner
- Receipt Status
- Receipt Type
- Receipt Source
- Received By
- PO Owner
- Invoice Status
- Matching Status
- AP Status

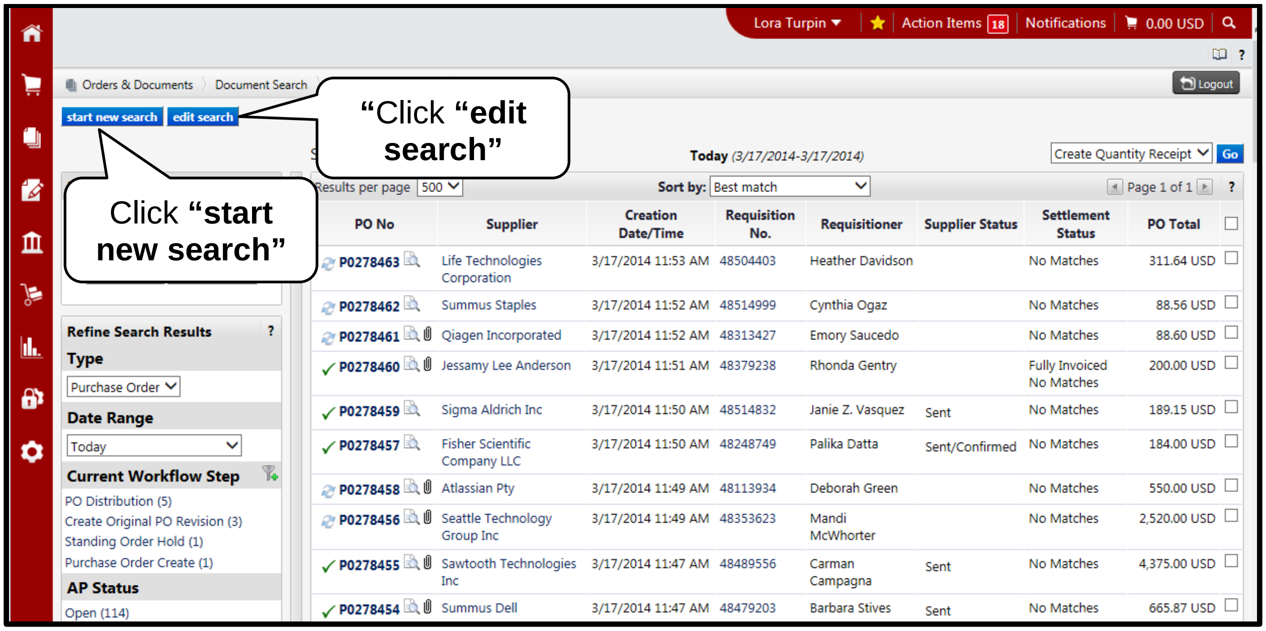
The **Filtered By** section and post-search filter options will display on the left side of the search results page.



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 one.

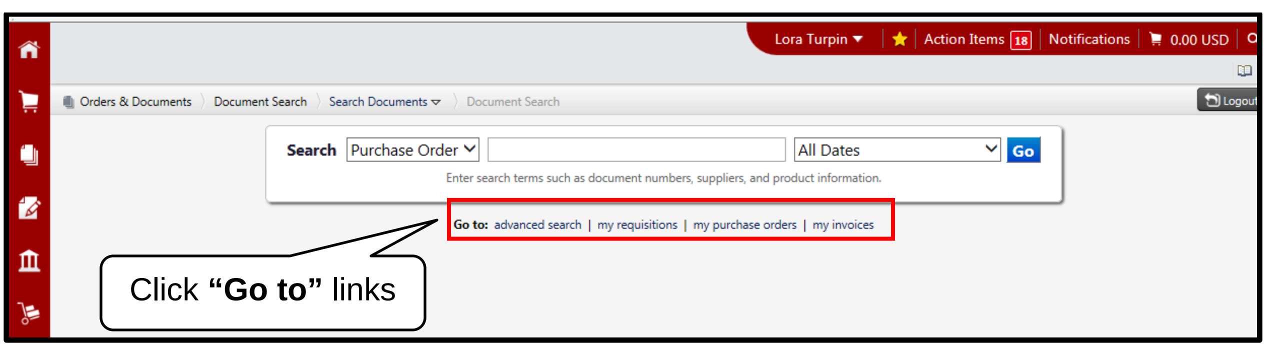
- **Edit Search** – if you have performed a search and click on **“edit search”** you are taken back to the search screen and your entire search criteria will be pre-populated in the appropriate fields. You do not have to start over.
- **Start New Search** – after performing a search and selecting various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

Remembering My Last Document Search – 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.



<u>My Requisitions</u>, <u>My Purchase Orders, and My Invoices</u> – within **Document Search**, there are links for **"my requisitions", "my purchase orders"** and **"my invoices"**. 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.

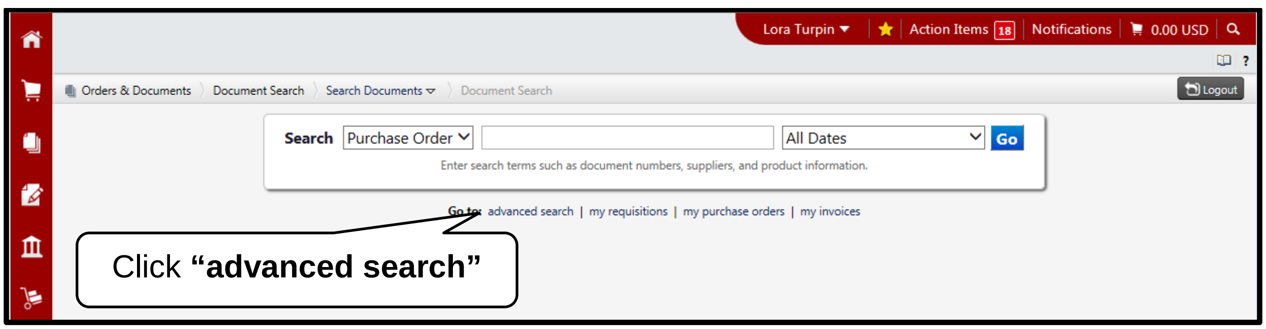
To access these features, click on the **"Go to:"** links from the **Document Search** page.



Advanced Search

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 PO's still pending for Fisher but have completed invoices within the last 30 days.

To access **Advanced Search**, click on the **"advanced search"** link from the **Document Search** page.



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

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

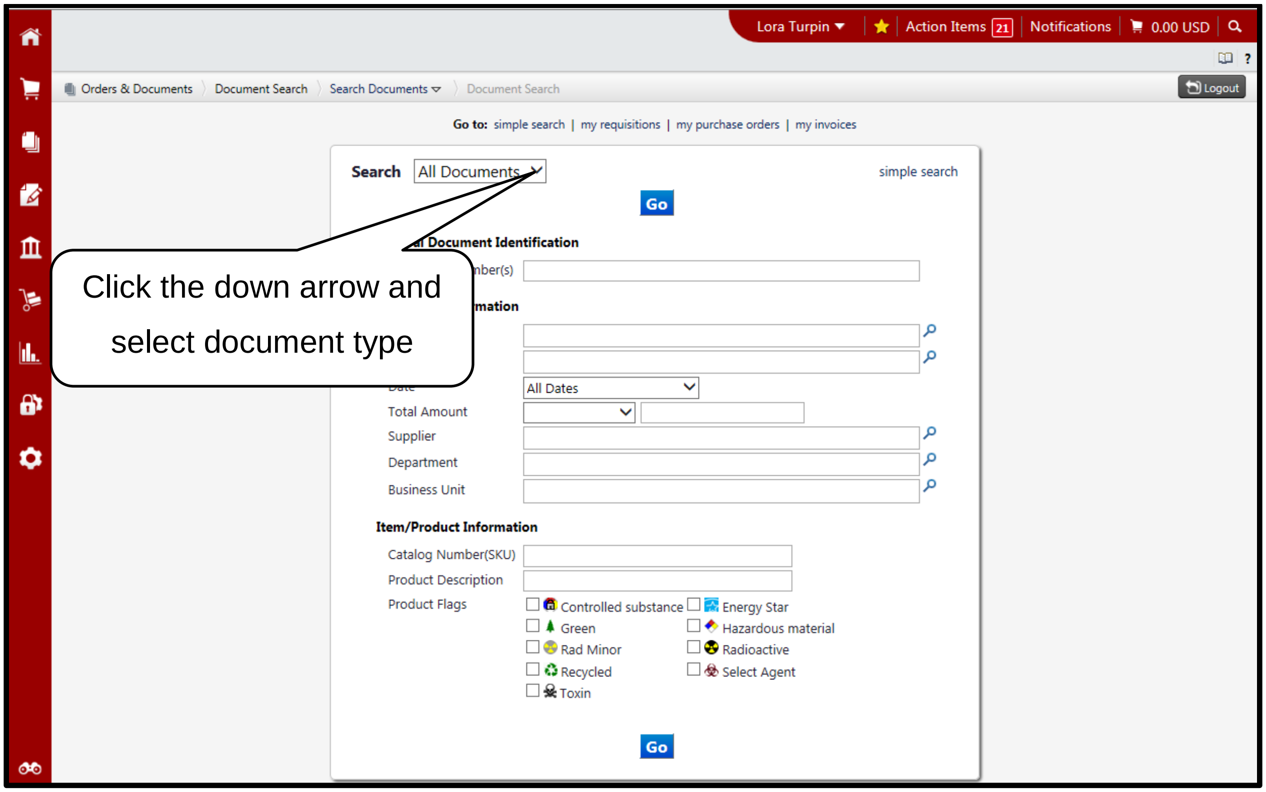
- **General Document Identification** – Enter the document number(s) (Requisition, Purchase Order, Invoice or Receipt).
- **Document Information** – In this section, you can select and/or enter any specific information related to the document including: Participant(s), Owner, Date, Total Amount, Supplier, 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.

Multiple Inputs for Document Number Fields – 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.

Multiple Users for User Search Fields – 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 on 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:

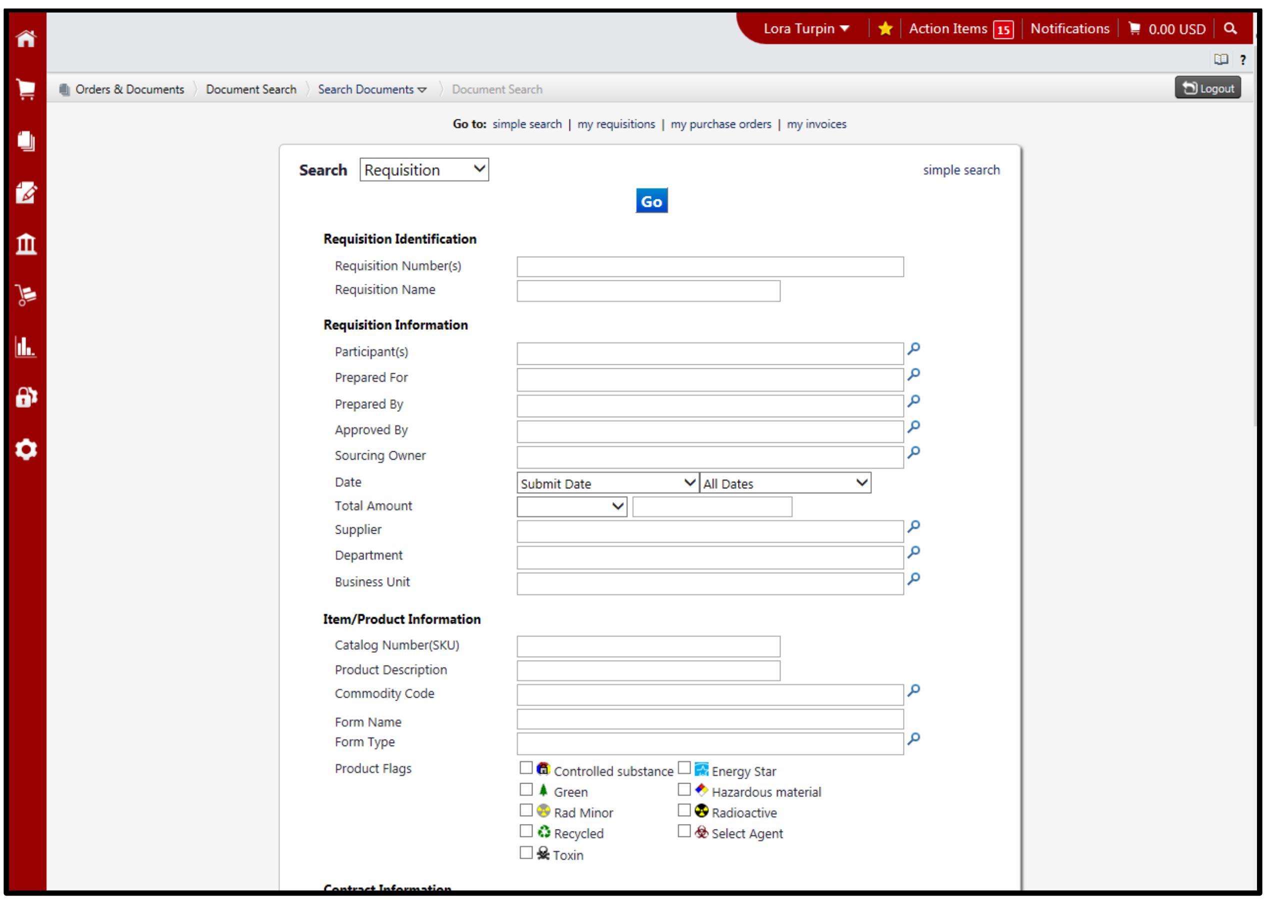
- Requisition Identification
  - Requisition Number – search box
  - Requisition Name – search box
- Requisition Information
  - Participant(s) – search box. Participant is any user that has touched the particular document. You may search for participants by their username, first name, last name or email 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, Complete Date, Create Date, Last History Date or Purchase Order Create Date. Select date range from a drop down menu: Days, Calendar, Fiscal & Other
- 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

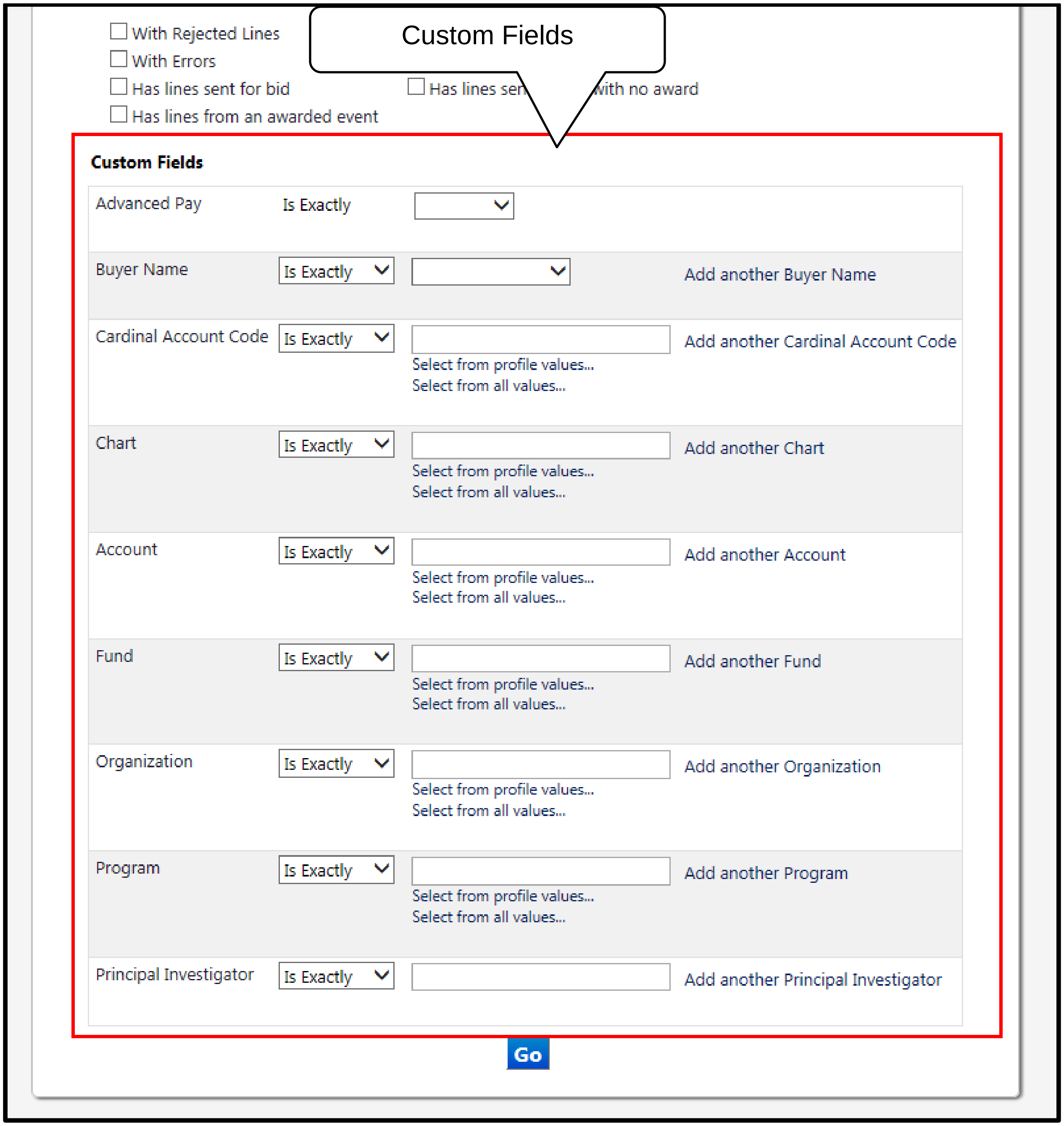
- Sourcing Status – make selection from the following check boxes:
  - Out for bid
  - Awarded bid
  - Outstanding Events
- Status Flags – make selection from the following check boxes:
  - With Rejected Lines
  - With Withdrawn Lines
  - With Errors
  - With Attachments
  - Has lines sent for bid
  - Has lines sent for bid with no award
  - Has lines from an awarded event



Custom Fields – 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
- Principal Investigator


Custom Fields
With Rejected Lines
With Errors
Has lines sent for bid
Has lines from an awarded event
Has lines sen
with no award
Custom Fields
Advanced Pay
Is Exactly
Buyer Name
Is Exactly
Add another Buyer Name
Cardinal Account Code
Is Exactly
Select from profile values...
Select from all values...
Add another Cardinal Account Code
Chart
Is Exactly
Select from profile values...
Select from all values...
Add another Chart
Account
Is Exactly
Select from profile values...
Select from all values...
Add another Account
Fund
Is Exactly
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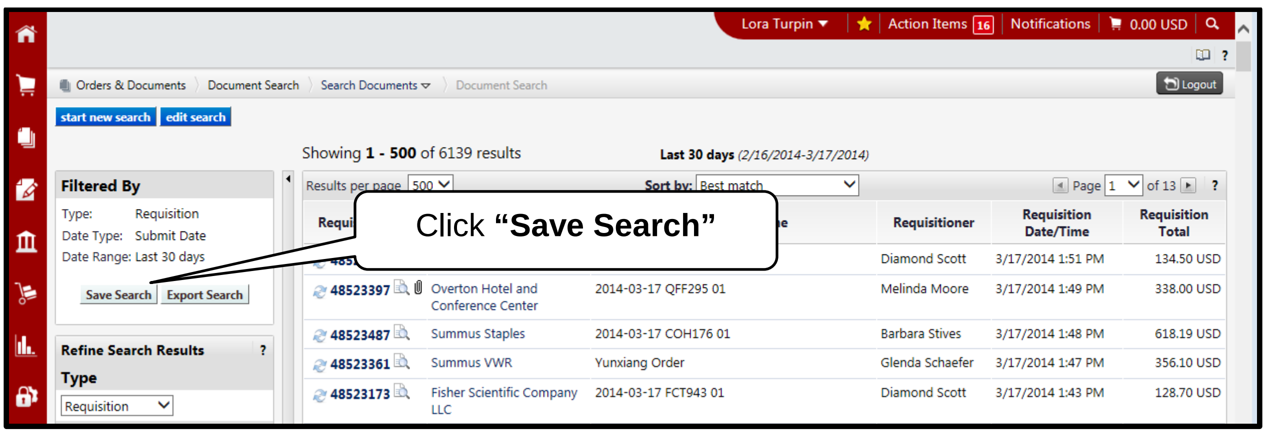
Select from profile values...
Select from all values...
Add another Organization
Program
Is Exactly
Select from profile values...
Select from all values...
Add another Program
Principal Investigator
Is Exactly
Add another Principal Investigator
Go

Creating and Saving Document Searches

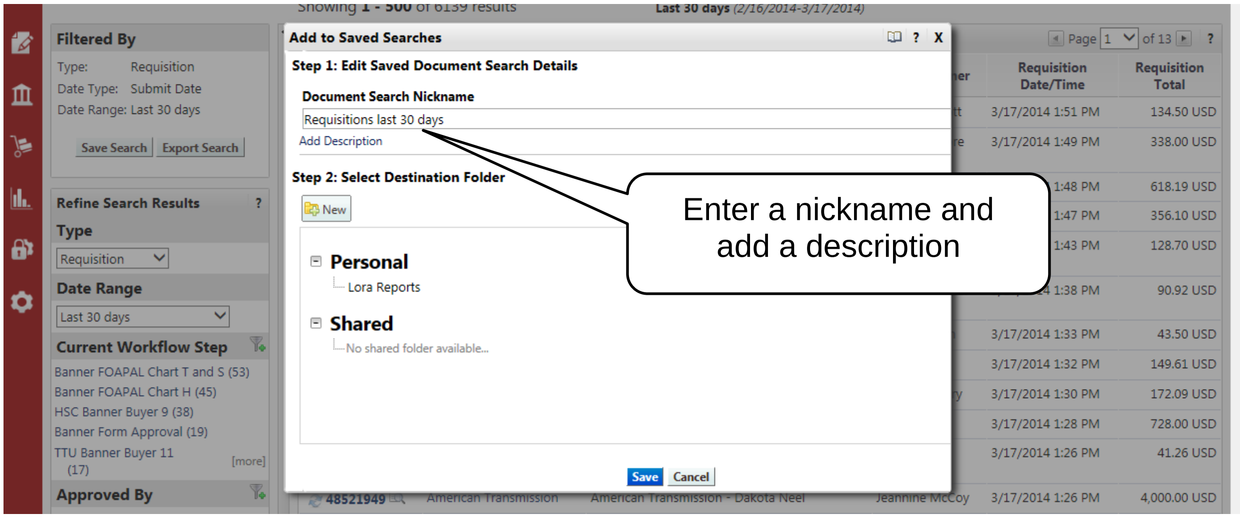
<u>Creating a Saved Search</u> – you can save your search criteria from **Document Search** including any keywords, date ranges, and post-search filters. Perform a simple or advanced search using the desired search criteria. Saved searches are created from the search results page. You are saving the search criteria you executed to get to that results page. For example, if you execute a search for all Requisitions for the last 30 days and opt to save this search, the criteria saved in the search will be the same. The last 30 days would be from the date of report execution and not from the date that the report was saved.

To save a search, click on the **"Save Search"** button located in the **Filtered By** section.



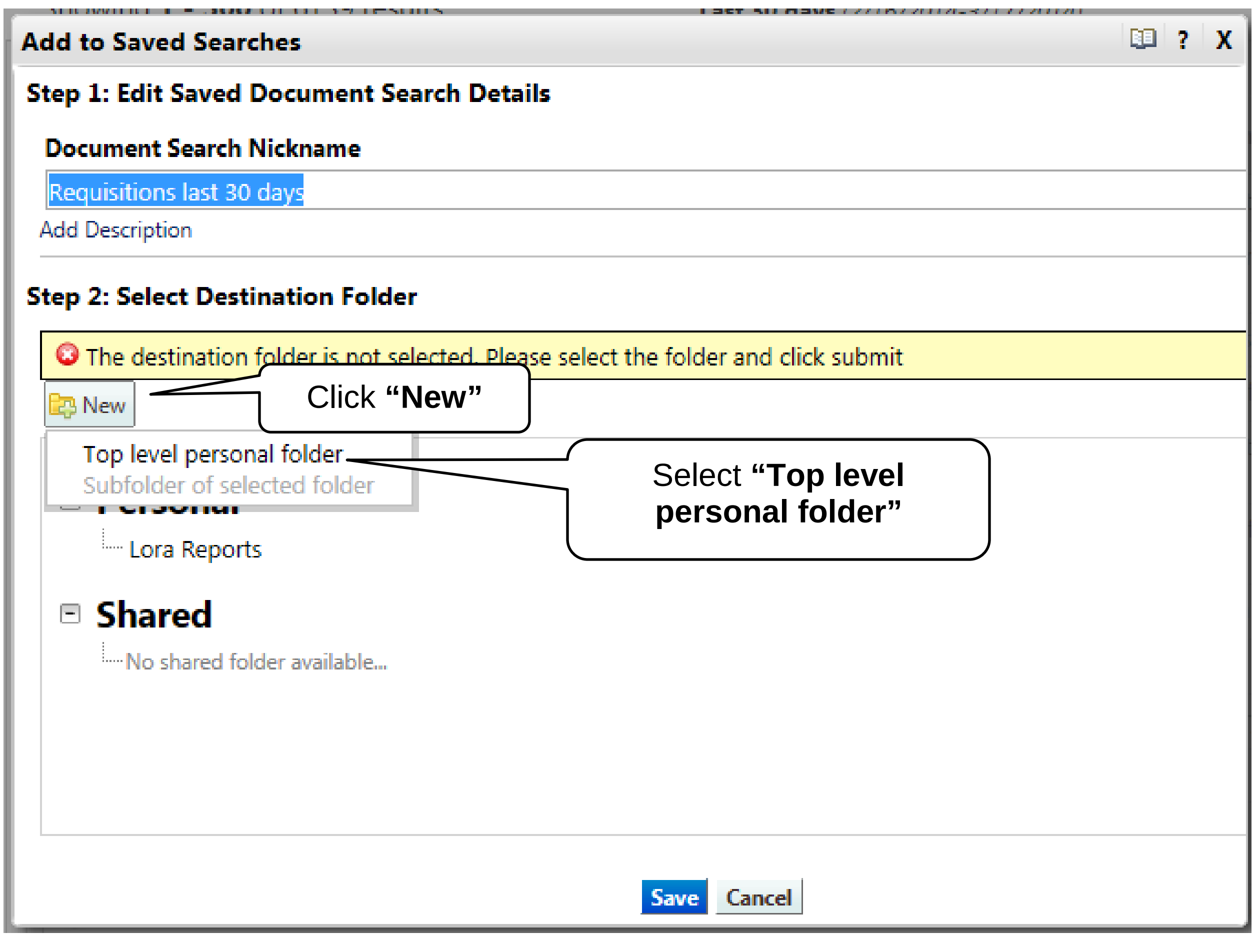
Step 1**: Edit Saved Document Search Details**

- Enter a nickname for the search in the **Document Search Nickname** field.
- To add a description, click on the **"Add Description"** button

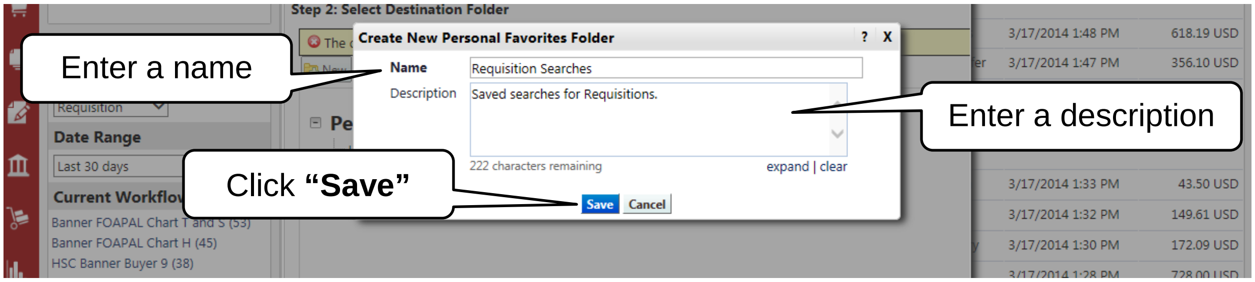


Step 2: **Select Destination Folder**

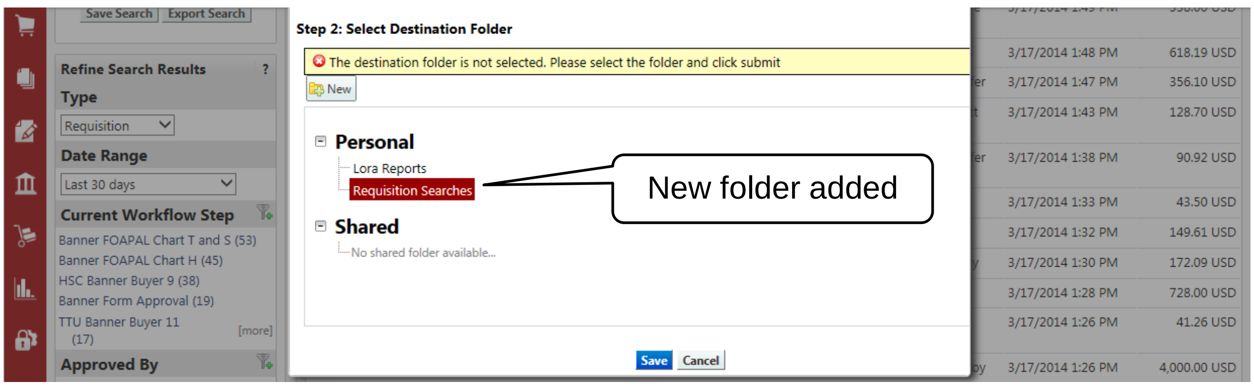
- Create a new folder by clicking on **"New"** and selecting the **"Top level personal folder"** button.



- **Create New Personal Searches Folder** – enter a name for the new top level personal folder in the **"Name"** field and enter a description in the **"Description"** field.
- Click on **"Save"**.



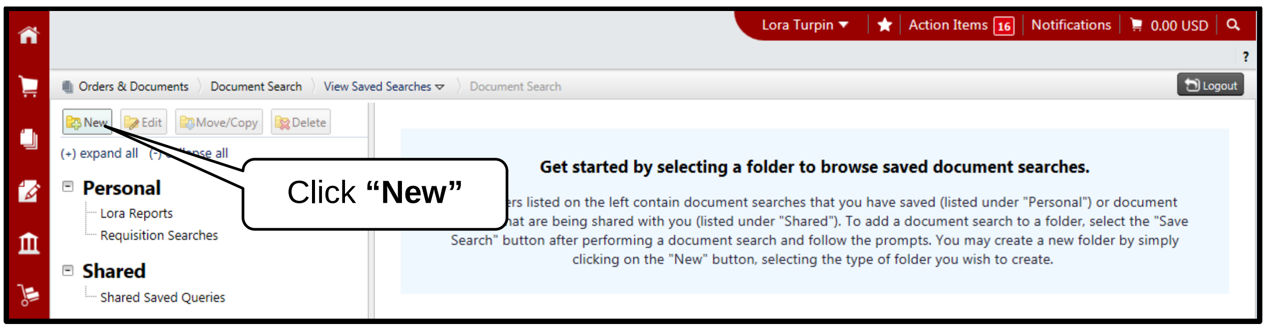
A new folder will be added to the area you selected



<u>**Saving Document Searches**</u> - is similar to saving Favorites. You create folders in which to store your saved searches which make them easier to locate and manage. Folders can be created during the execution of saving a search or in the **"saved searches"** tab. You can run your saved searches and also manage them from the **"saved searches"** tab. Searches can be deleted and moved/copied to another folder; search names and descriptions can be edited; and you can also add a saved search as a shortcut on your main search page.

<u>**Create a Saved Search Folder**</u> – In Document Search, click on the **"Orders & Documents", "Document Search"** and **"View Saved Searches".**

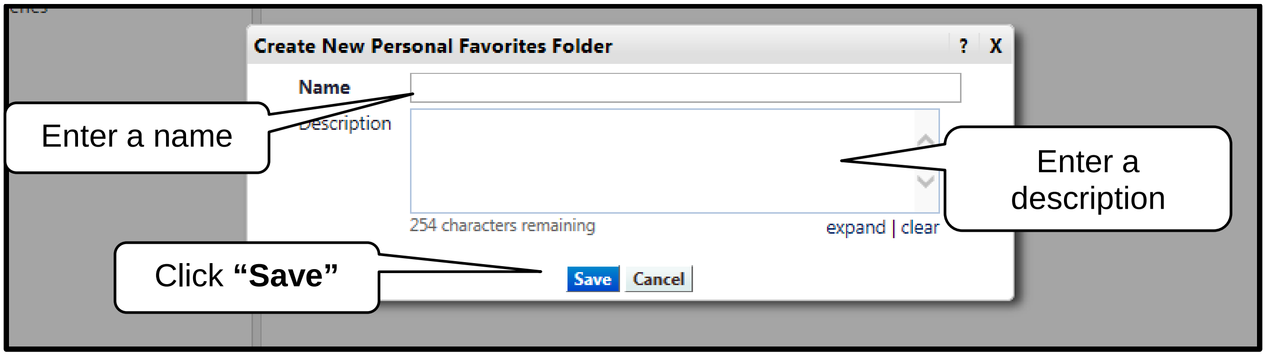
Click on the **"New"** button in the top left.



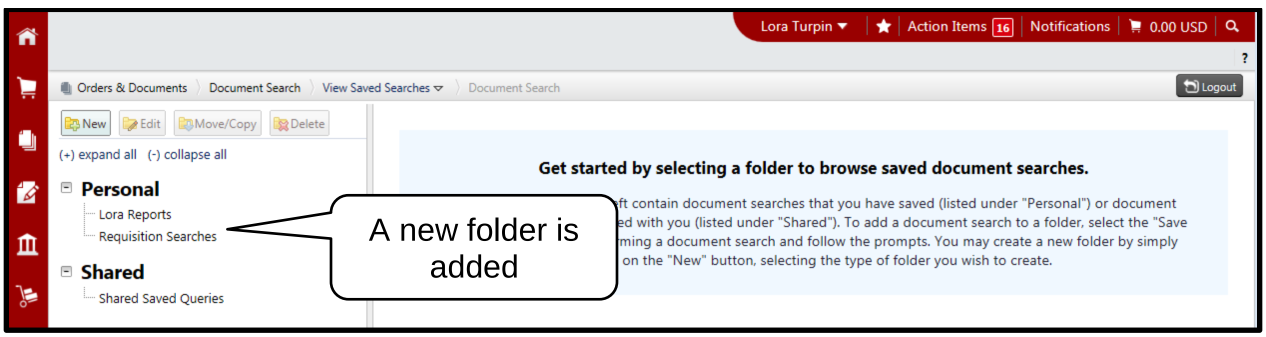
Click on the type of folder you would like to create:

- **Top level personal folder** – this will create a new top level folder that will be available only to you.
- **Top level shared folder** – this will create a new top level folder that is accessible to your organization.
- **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.

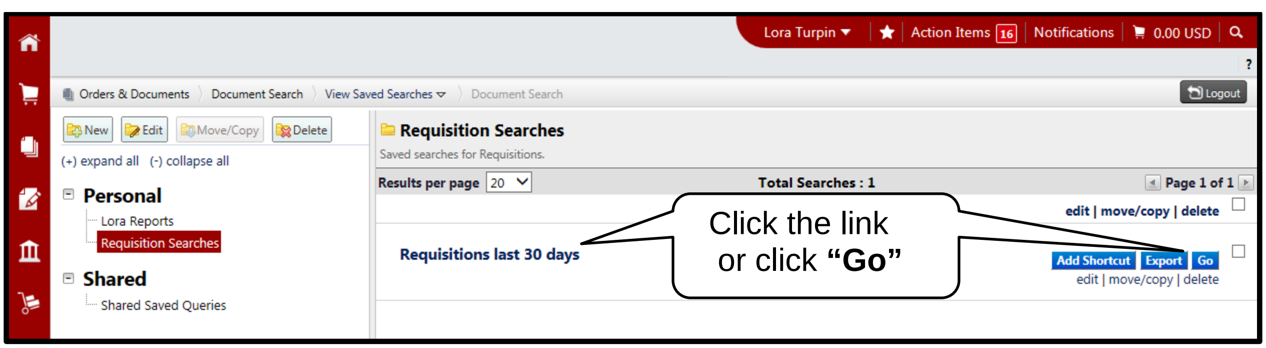
Enter a name in the **Name** field and a description in the **Description** field for the folder and click on **"Save"**.



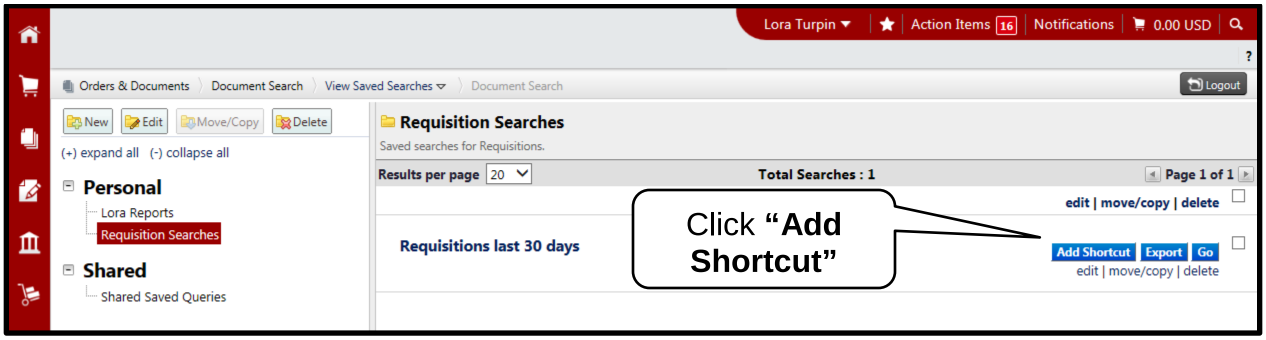
A new folder will be added to the area you selected.



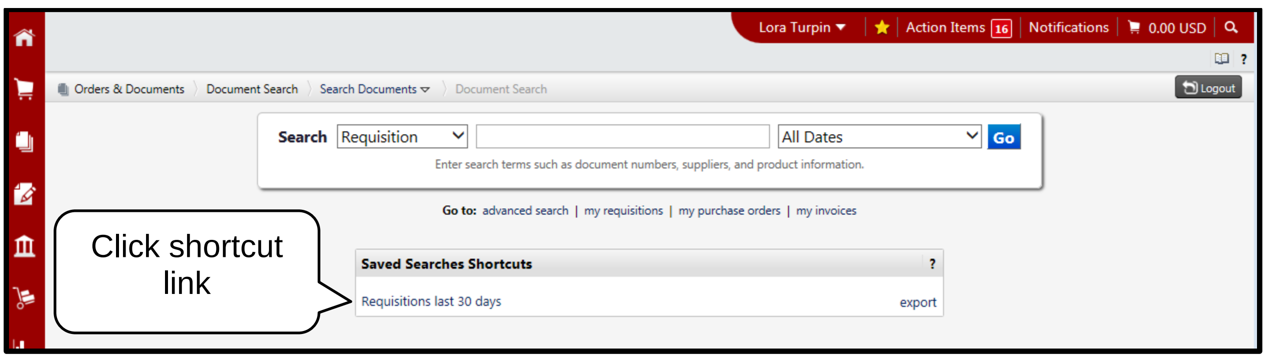
Run a Saved Search – on the **"saved searches"** tab locate the search you would like to run. Click on the Saved Search name link or click on the **"Go"** button. Your search will run.



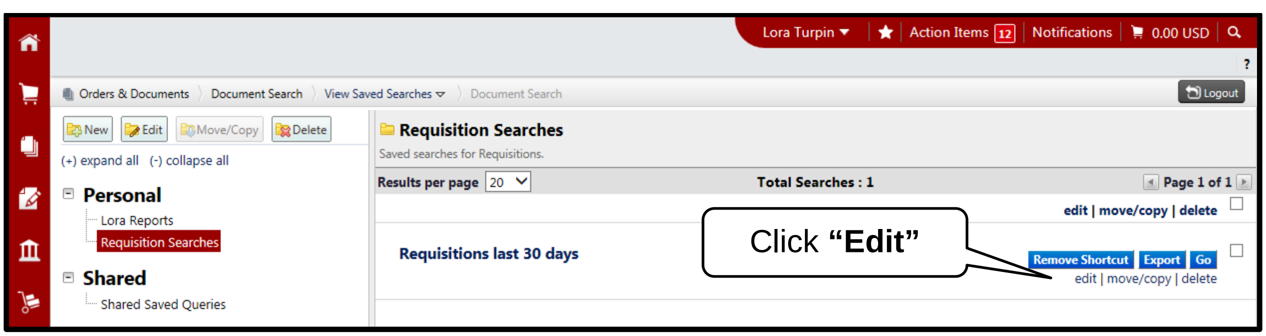
Create and Run a Saved Search Shortcut – on the **“saved searches”** tab, locate the search you would like to create a shortcut and click on the **“Add Shortcut”** button.



This feature will add a shortcut to run the saved search from the main **Document Search** page. Click on the shortcut name link to execute the saved search.

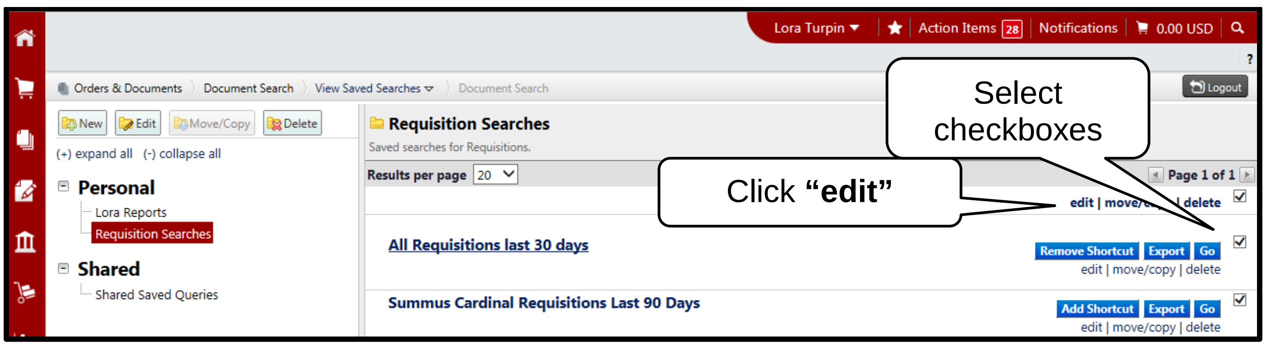


Edit a Saved Search Name and Description – on the **“saved searches”** tab, locate the saved search you want to edit and click on the **“edit”** link.

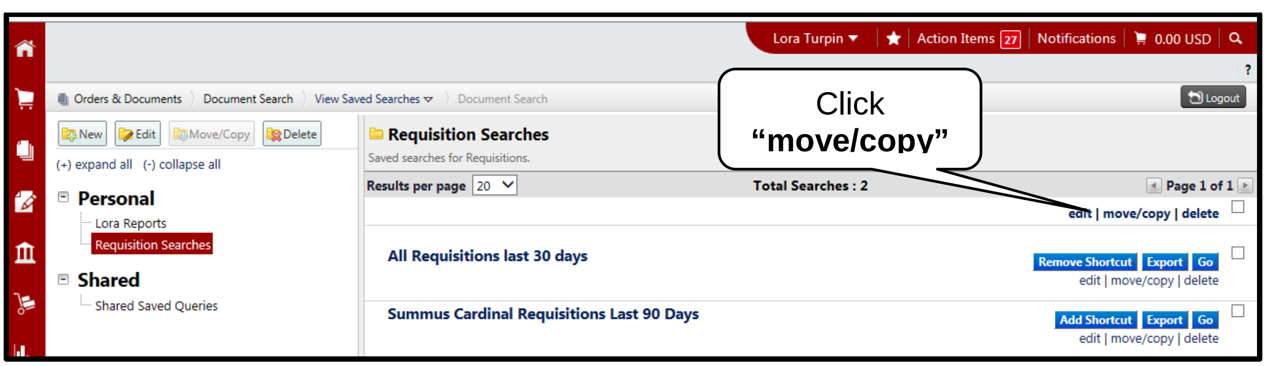


Make the desired changes and click on **"Submit"**. The changes will be applied to the saved search.

To edit the name and description of multiple saved searches select the checkboxes to the right of the appropriate searches then click on the **"edit"** link at the top. You can then change the information for all of the selected searches.

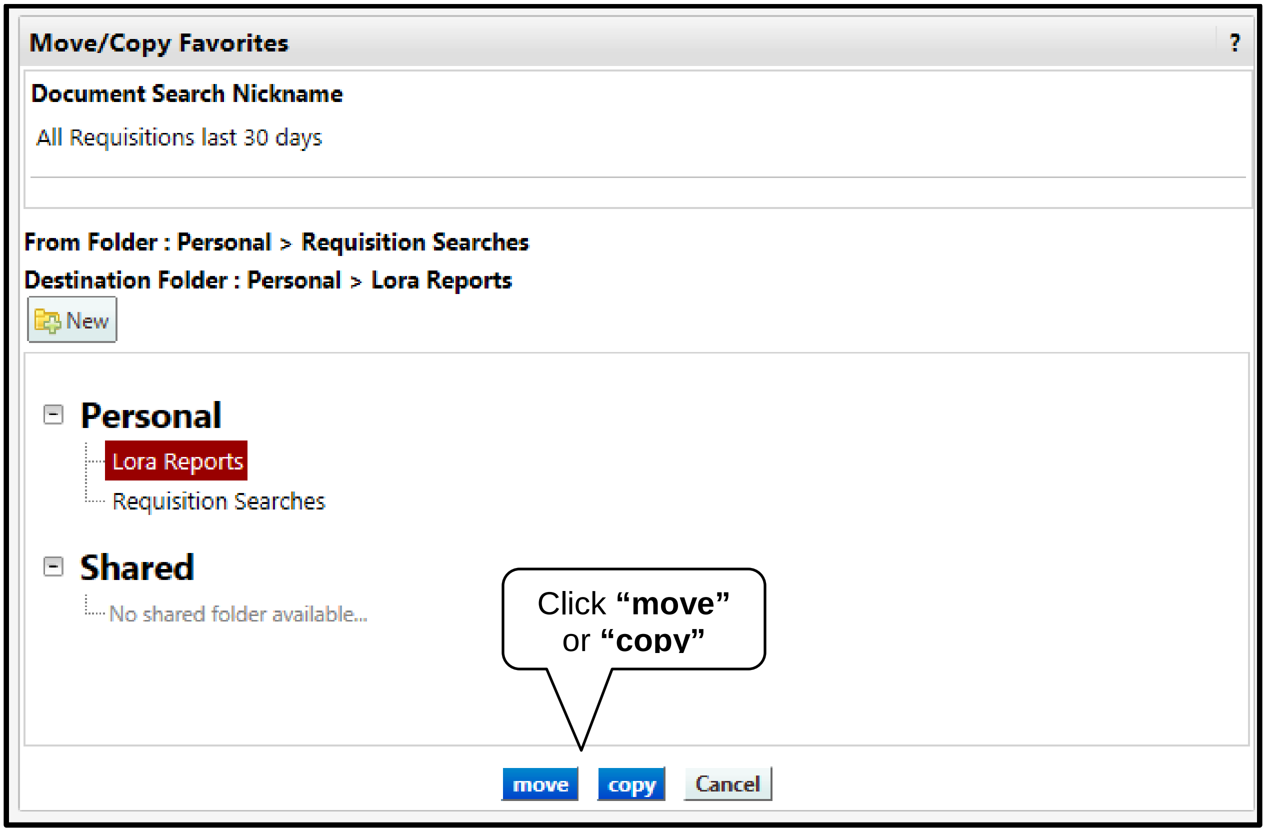


<u>Move or Copy a Saved Search to Another Folder</u> – on the **"saved searches"** tab, locate the saved search you want to move or copy and click on the **"move/copy"** link.

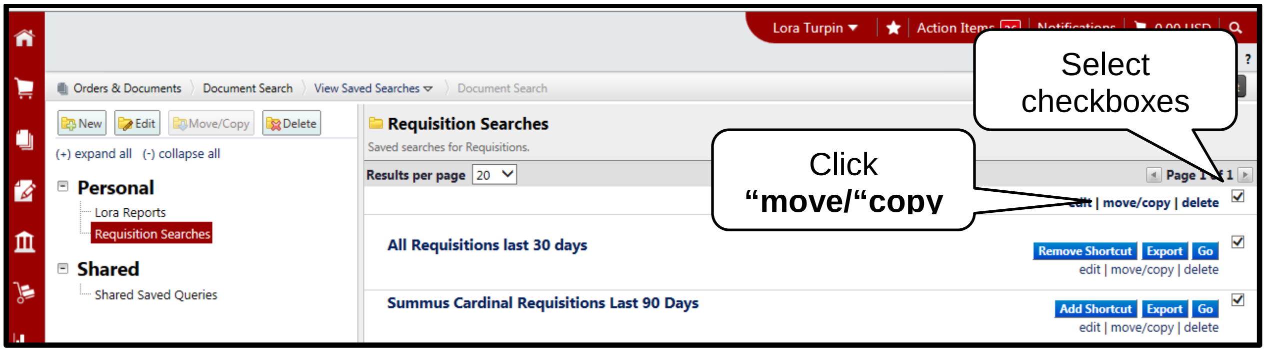


Select the folder that you would like to move or copy the search to. Click on the **"move"** or **"copy"** button.

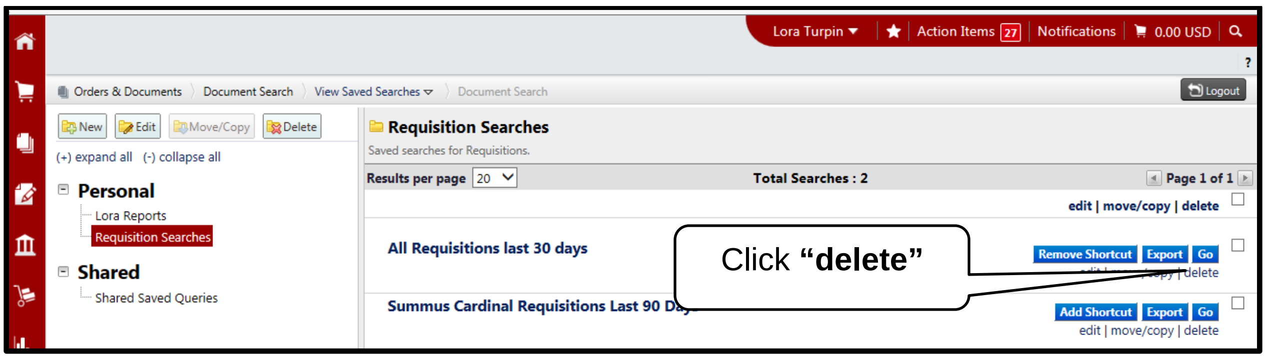
- The **"move"** button will move the search to the selected folder. The search will no longer be available in the original folder.
- The **"copy"** button will copy the search to the selected folder. The search will be available in both the original and selected folders.



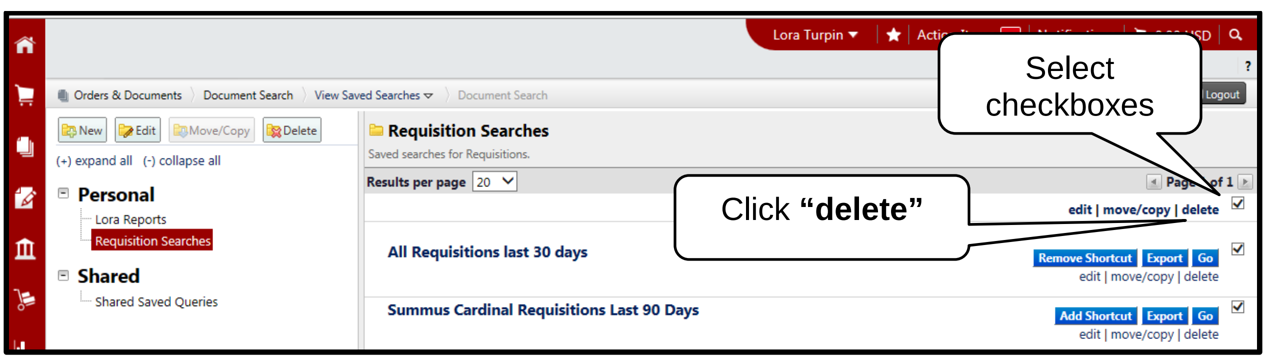
To move or copy multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then click on the **"move/copy"** link at the top. You can then move or copy the selected searches to the desired folder.



Delete a Saved Search - on the **"saved searches"** tab, locate the saved search you want to delete and click on the **"delete"** link. Click **"OK"** to delete the search.



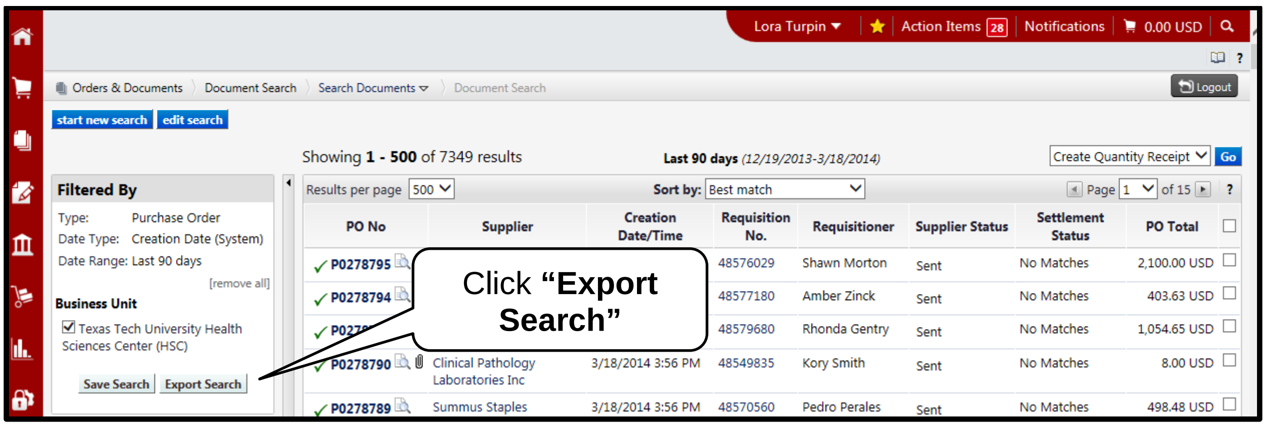
To delete multiple saved searches select the checkboxes to the right of the appropriate searches then select the **"delete"** link at the top. All selected searches will be deleted.



Document Search Export

When you perform a document search you can export the results for further reporting and analysis. The Document Search export feature allows you to do these exports after executing a saved search and to schedule recurring instances of certain report types. When you export a saved search, a downloadable .csv file is created. The file is available in Document Search exports for a period of seven days.

Export Data from Search Results Page - Perform a simple or advanced search using the desired search criteria. In the **“Filtered By”** area click on the **“Export Search”** button.

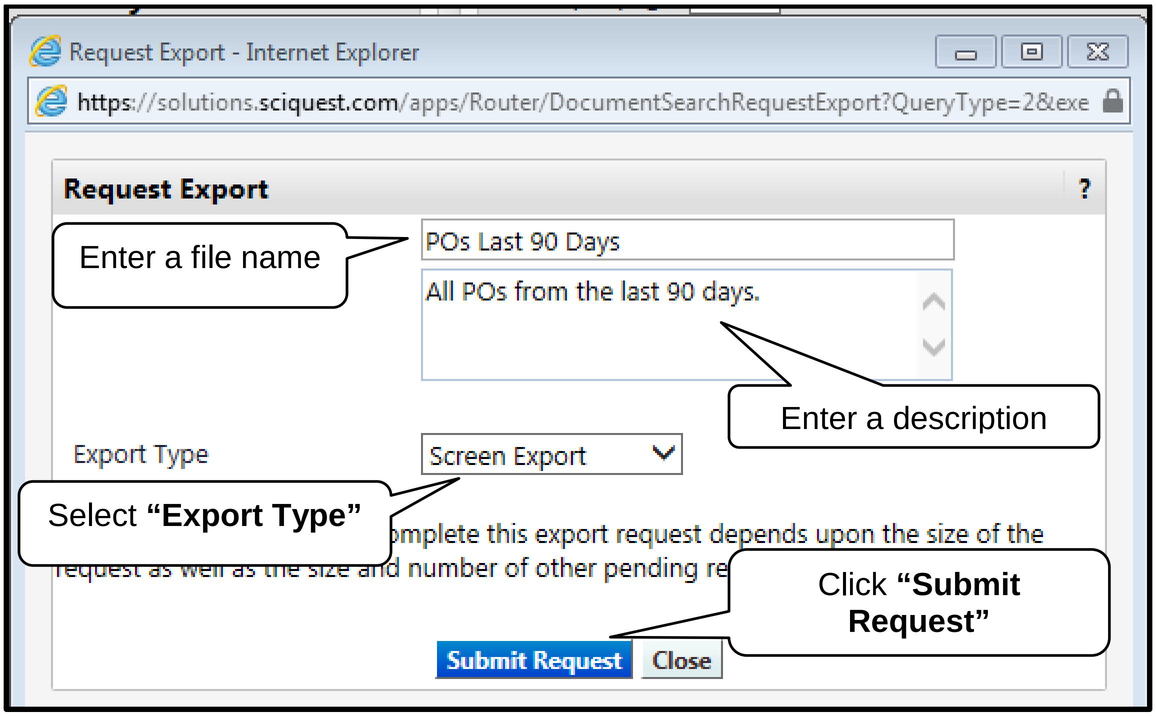


Enter a file name in the **“File Name”** field and a description in the **“Description”** field for the export. Select an **“Export Type”** from the drop down menu.

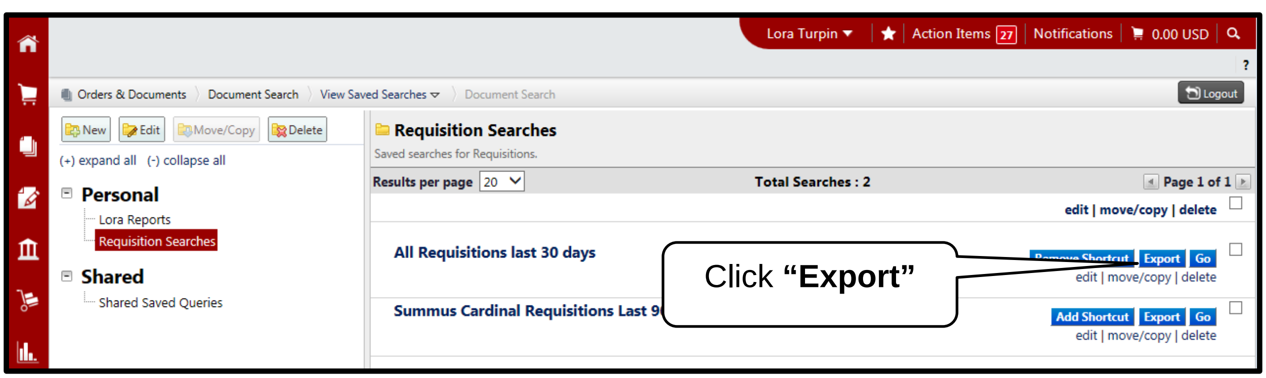
- **Screen Exports** - Screen exports will export the search results exactly as they appear on the results screen with no additional data. The data in the screen results will vary based on the document type you have searched for.
- **Transaction Exports** - Transaction exports will export all information available about the transaction associated with each document. Transaction exports cannot be used for “All Document” searches.
- **Full Export** – Full export is only available for PRs and POs. It is not a recommended export type. Contact the system administrator for additional information.

Note: If you are exporting a search with multiple document types you must select **"Screen Export"**.

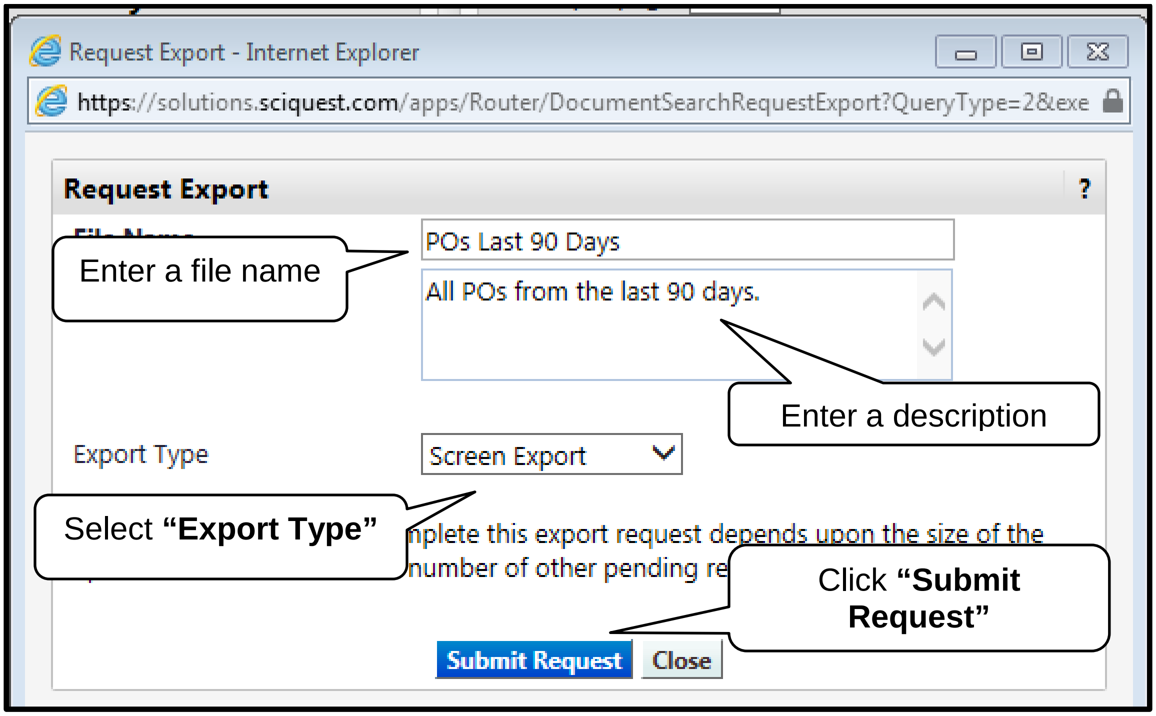
Click on the **"Submit Request"** button. You will see this message: "The export request has been successfully submitted. Pending and completed exports are available in the Document Search > Exports section."



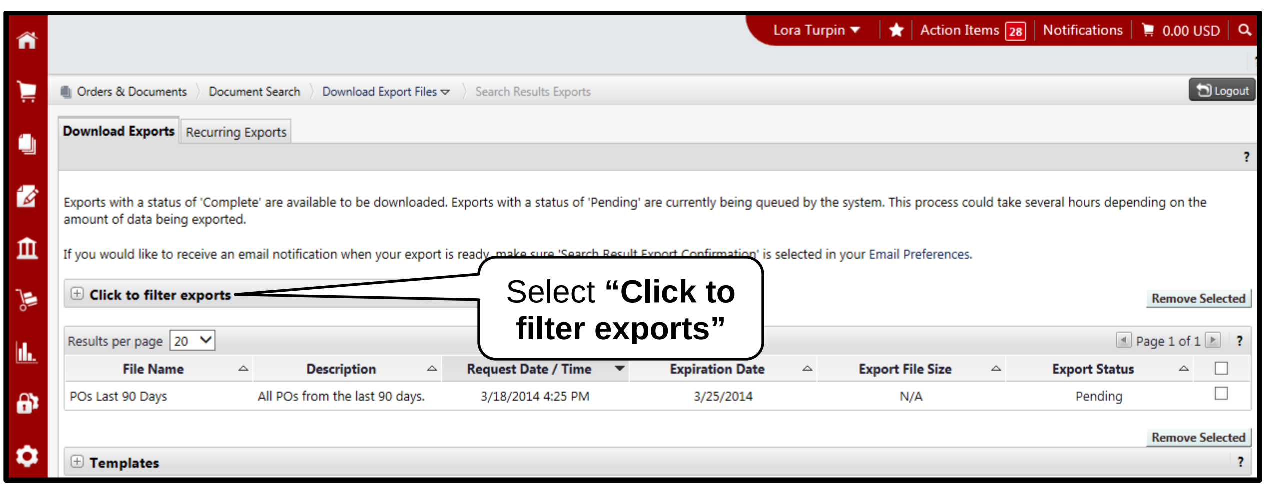
Export Data from a Saved Search - in the **"view saved searches"** link, locate the saved search you want to export and click on the **"Export"** button.



Enter a file name in the **"File Name"** field and a description in the **"Description"** field for the export. Select an **"Export Type"** from the drop down menu and click on the **"Submit Request"** button. Your export request will be submitted.



Downloading Search Exports – access exports in the **"Document Search"** and **"download exports files"** lik. If there are several exports you may want to filter them to locate the export you want to download. Select **"Click to filter exports"**.



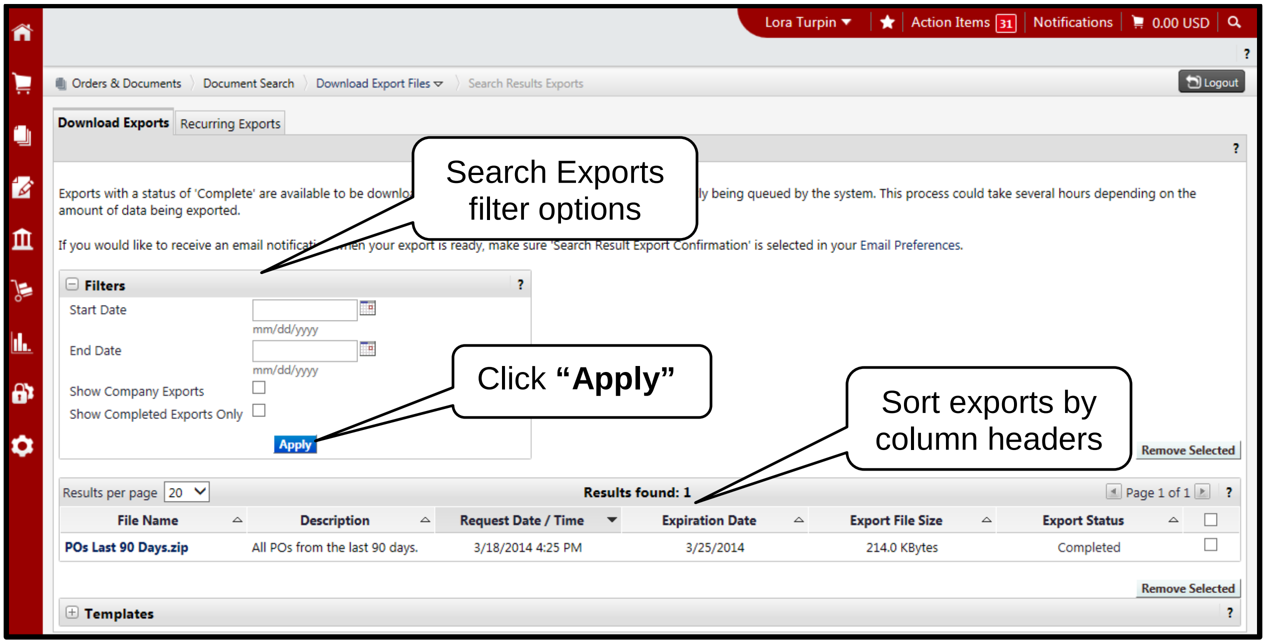
Filters: Use the Search Export filter options to narrow down the history entries to a specific date range or export status. Click on **“Apply”** after selecting your filter option(s).

- **“Start Date – End Date”** - Enter a date range that the export was requested.
- **“Show Company Exports”** - If you have permission only to view your own exports, this checkbox will not be available. Only users with the Manage Company Exports permission will be able to view all exports.
- **“Show Completed Exports Only”** - selecting this checkbox will remove any exports that are pending or are in an error state.

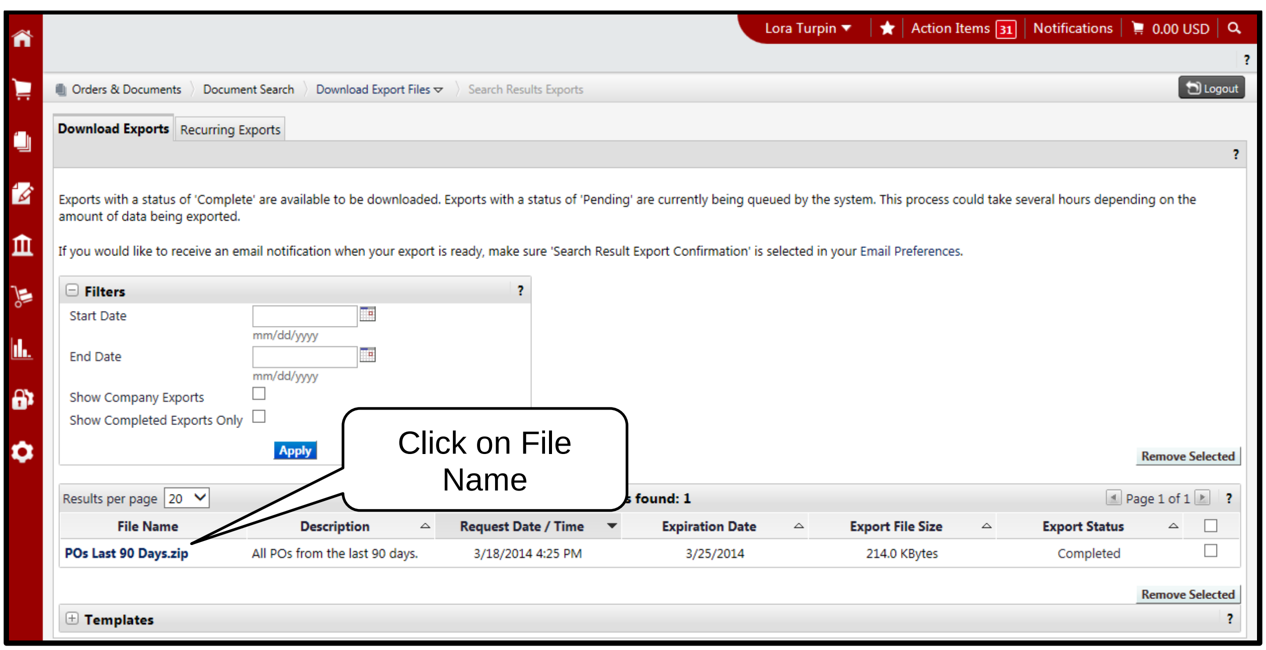
You can also sort your exports by the column headers:

- **“File Name”** - the file name assigned when the export was created. The **“File Name”** is selectable and provides view/save access to the export file.
- **“Description”** – the description entered when the export was created.
- **“Request Date/Time”** – the date/time the export was submitted.
- **“Expiration Date”** – the date the export will expire.
- **“Export File Size”** – the size of the export file in kilobytes.
- **“Export Status”** - indicates the state of the requested export. The following statuses will appear:
  - Completed: The export request has completed and is available for download. The requesting user will receive an email notification if selected to do so in Email Preferences.
  - Pending: The export request is still processing. Delays are potentially due to the size of the export request or to the number of simultaneous export requests.
  - Processing Error: The export request has errored out and will not be available to the end user. If this condition occurs, then simply delete the current request and issue another using the same criteria. If the request continues to error out, then contact your System Administrator.
  - No results: The export request has completed however no documents were returned. The requesting user will receive an email notification if the user has selected the Email Preference Search Result Export Confirmation.

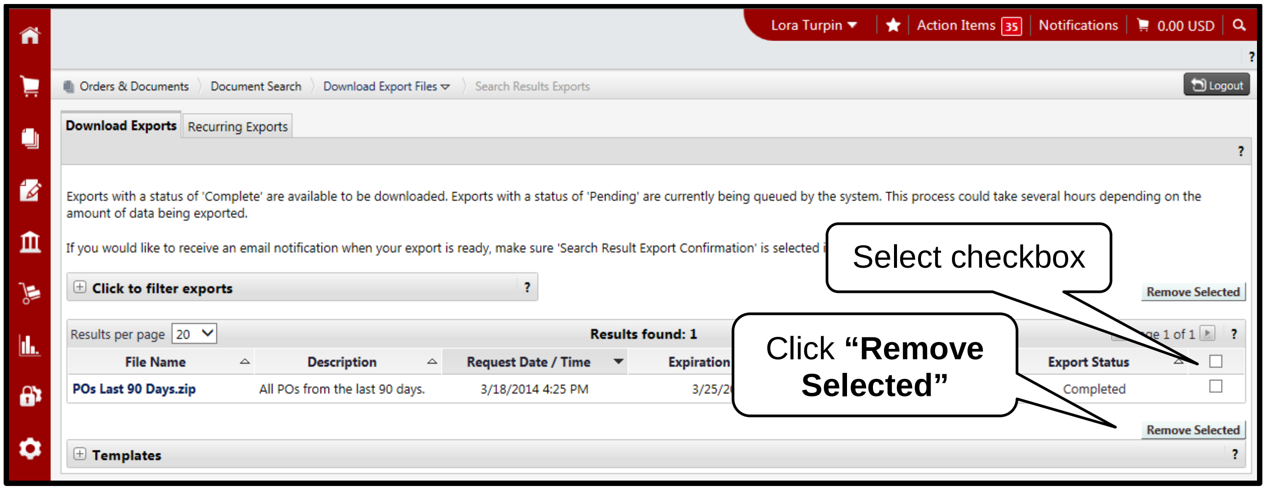
- Too many results: The export request has completed however the number of documents exported exceeds the file size limit defined by SciQuest. The requesting user will receive an email notification if the user has selected the Email Preference Search Result Export Confirmation.



Click the File Name. Select to **"Open"** or **"Save"** the file.



When you have downloaded the file, you can choose to remove it from the exports. Select the checkbox to the right of the export then click the **"Remove Selected"** button above or below the export list.

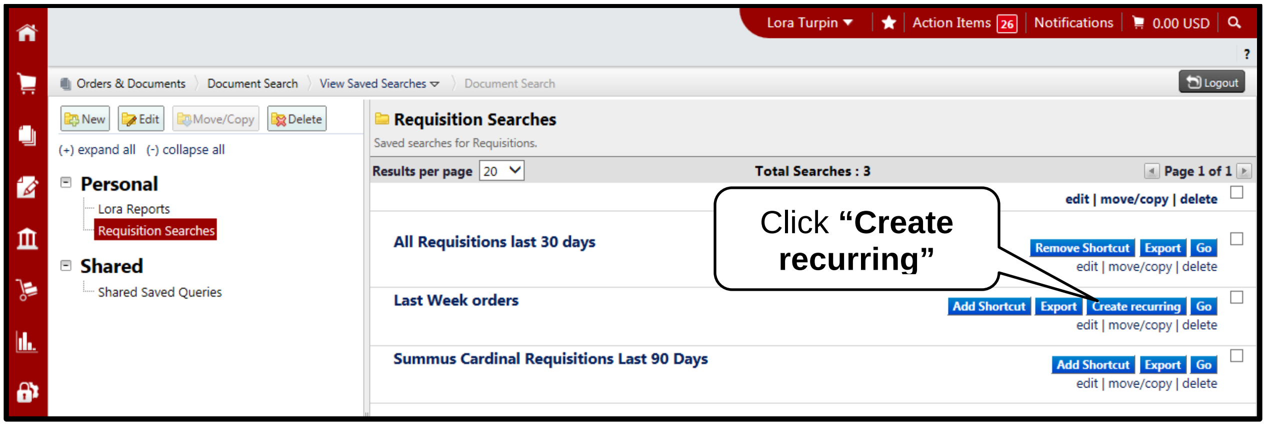


<u>Recurring Exports</u> - Some document search exports can be scheduled to recur on a regular basis. A report that uses a date range of ***Last Month*** or ***Last Week*** is eligible for recurring export. When you create a recurring report it will be scheduled to run based on the date range and the day or date you create it.

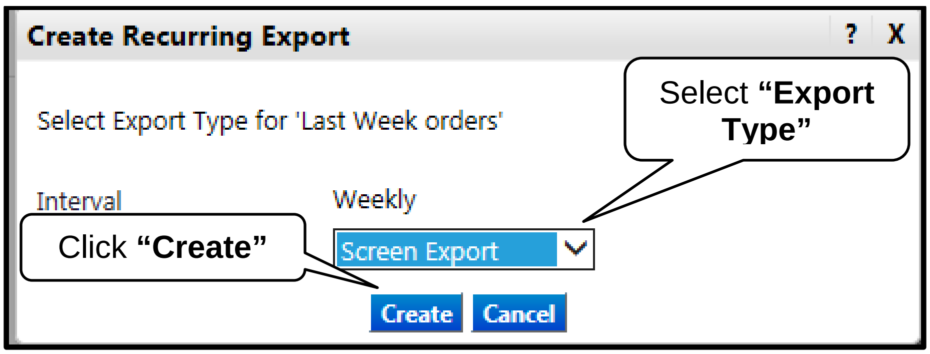
- **Last Month** - When you create a recurrence on a saved search with a date range of Last Month, the export will run every month on the same date until the recurrence expires.
- **Last Week** - When you create a recurrence on a saved search with a date range of Last Week, the export will run every week on the same day until the recurrence expires.

<u>Note</u>: Scheduled recurring exports will expire one year from the date they were created.

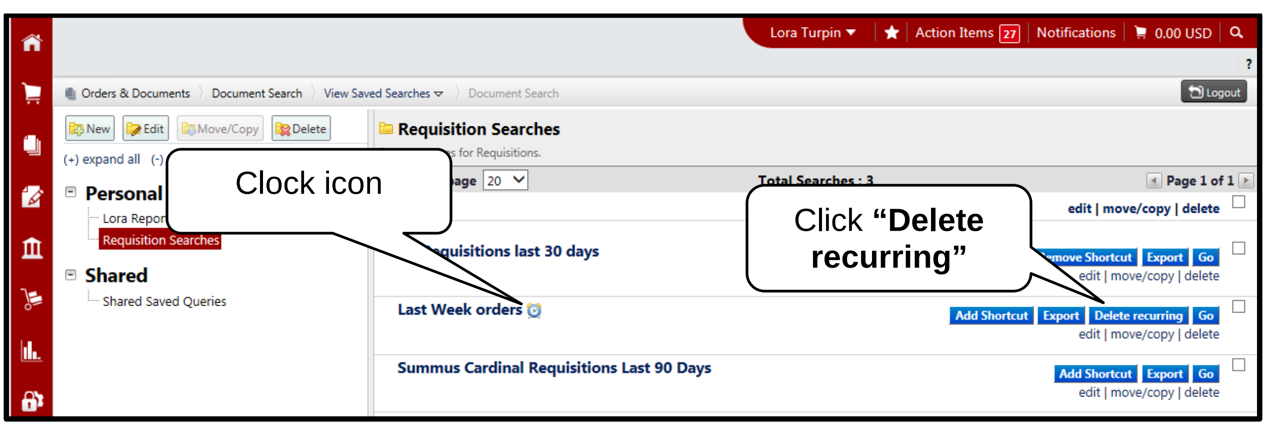
<u>Create a Recurring Export</u> – to create a recurring export for a saved search, locate the saved search in the **"saved searches"** tab. Saved searches that are eligible for a recurring export will have a "**Create recurring"** button. Eligible searches have a date range of **"Last Week"** or **"Last Month".** In order for a saved search to be eligible for a recurring export it must have a date range of ***"Last Month"*** or ***"Last Week"***. Click on the **"Create recurring"** button**.**



Select an **"Export Type"** from the drop down menu and click on **"Create"**.



A saved search that is configured to have a recurring export will have a clock icon. You can delete the saved search export recurrence by selecting the **"Delete recurring"** button.



To review your recurring exports go to the “**Download Export Files”** link and **“Recurring Exports”** tab. You can create a new recurring export from a saved search by selecting the **“Create from saved search”** button. This will take you to your saved searches. You can create a new search by selecting the **“Create new search”** button. This will take you to the main search page.

You can review and manage your existing recurring exports:

- **“Description”** - the description assigned when the recurrence was created.
- **“Interval”** - how often the export will run based on the date range in the search. Saved searches that have a date range of **“Last Month”** will run monthly. Saved searches with a date range of **“Last Week”** will run weekly.
- **“Schedule Create Date”** - the date the recurring export was created.
- **“Schedule Expire Date”** - the date the recurring export will expire.
- **“Action”** - select Delete to remove the recurring export.