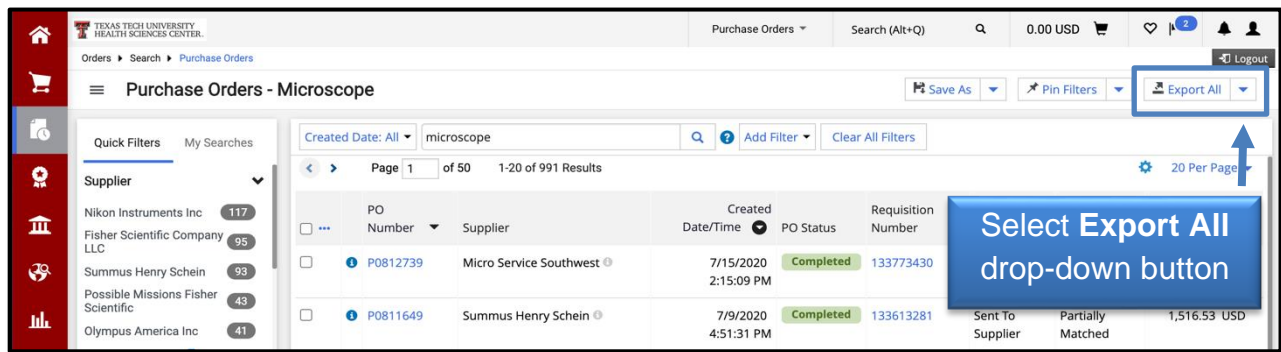




When you perform a document search, you can export the results for further reporting and analysis. The Manage Search Exports feature allows you to perform these exports after executing a Saved Search and to schedule recurring instances of certain report types.

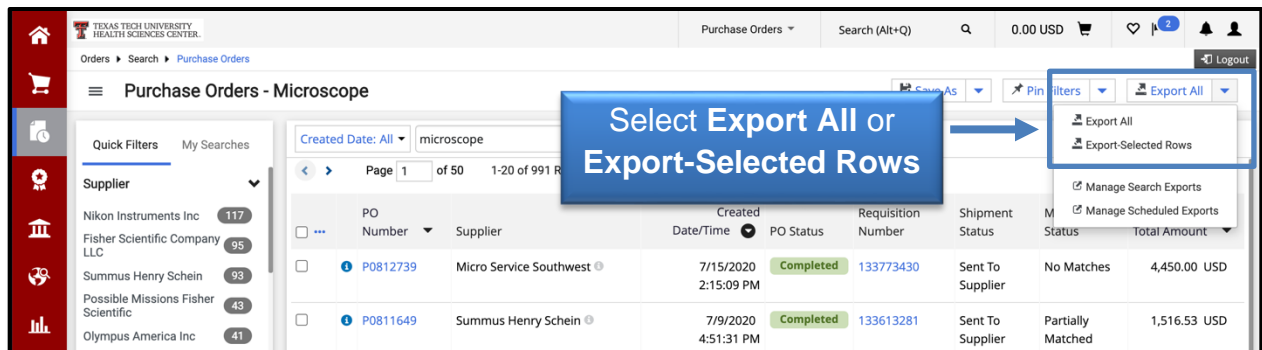
When you export a Saved Search, a downloadable .csv file is created. The file is available on the Manage Search Exports page from your user profile or by selecting Manage Search Exports from the Export drop down on a search results page. The file is available for a period of seven days.

To begin exporting your search results, select the **Export All** drop-down button.



You will be able to export the entire search or individual rows of the search. You will need to check the box next to one or more rows if you want to export rows.

Select either **Export All** or **Export-Selected Rows**.



A default Title is provided, but you may change the **Title Name** for export. The Format is automatically defaulted.

Select a required **Export Type** from the drop-down menu.

- Screen Layout – Screen Layout will export the search results exactly as they appear on the results screen with no additional data. The data in the Screen Layout will vary based on the document type you have searched for.

TechBuy – Export Searches

- Full Export – Full Export will export all information available about the transaction associated with each document. Full Export also includes document histories such as approvals, comments and more. Full export is only available for Purchase Requisitions and POs. It is not a recommended export type. Contact the system administrator for additional information.
- Transaction Export – Transaction Export will export all information available about the transaction associated with each document. Transaction Export is not available for “All Document” searches.
- User Defined Template – A User Defined Template produces columns of information in a file format defined by your needs. You may also create a User Defined Template by navigating to the Manage Export Templates, Export Template Tab, Create Template for..., and choose from the drop-down list.
 - New Template – Follow the three steps to create custom fields for your New Template.
 - Shared by Others – Templates created to be shared and only available for Purchase Order exports.

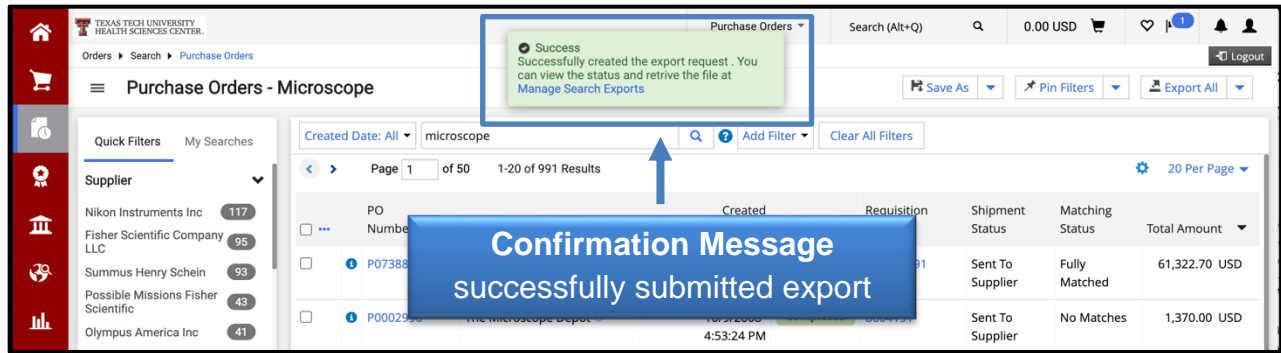
Note: If you are exporting a search with multiple document types, you must select **Screen Layout**.

Click the **Submit** button.

The screenshot shows the 'Export Purchase Orders' form. At the top right is a button labeled 'Change Title, if needed'. Below the title is a text input field containing 'Export request for Purchase Order' with a '67 characters remaining' indicator. To the left of this field is a blue button labeled 'Select Type'. Below the text field is a dropdown menu for 'Type' with options: 'Screen Layout' (selected with a checkmark), 'Full Export', 'Transaction Export', and 'User Defined Template'. At the bottom left is a 'Format' label. At the bottom center is a large blue button labeled 'Click Submit'. To its right is a smaller blue button labeled 'Submit'. A blue arrow points from the 'Click Submit' button to the 'Submit' button. A blue arrow points from the 'Select Type' button to the 'Type' dropdown menu. A blue arrow points from the 'Change Title, if needed' button to the title text field.

Once successfully submitted, you will see a confirmation message where you may view the status and retrieve the file at Manage Search Exports.

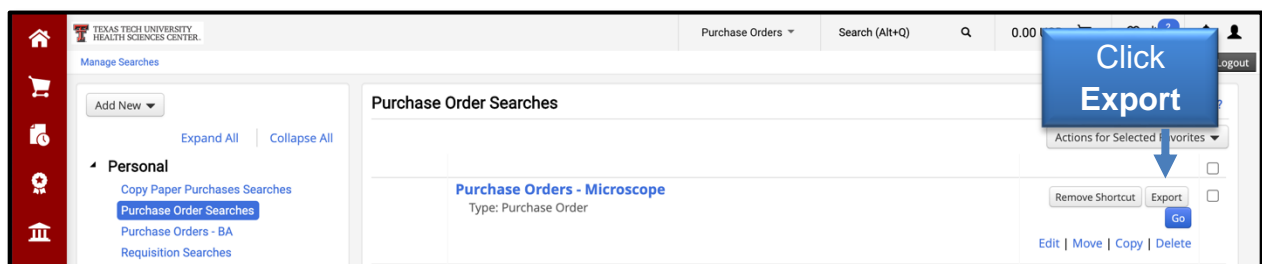
TechBuy – Export Searches



Export Results from a Saved Search

When you export a Saved Search, dates will be relative to the time you request the export instead of the date you saved the search. For example, if you select to export a Saved Search that searches for the last 30 days, it will return results dated 30 days from the date of the export.

To begin exporting data from a Saved Search, locate Saved Searches from the Manage Searches page or from your User Profile then Manage Searches. After you have chosen the search you would like to export, select the **Export** button.



A default Title is provided, but you may change the **Title** for export. The Format is automatically defaulted.

Select the **Type** of export from Screen Layout, Transaction Export, Full Export or User Defined Template. To submit your export request, click **Submit**.

TechBuy – Export Searches

Export Purchase Orders ×

Export Request Options (Step 1 of 1)

Title ★ Change Title, if needed

Purchase Orders - Microscope

72 characters remaining

Type Select Type

Format

- ✓ Screen Layout
- Full Export
- Transaction Export
- User Defined Template

★ Required

Click Submit → Submit

The export will be available in the Export Request tab of the Manage Search Exports section.

Downloading Search Exports

You may access exports in the Manage Exports section. Access this section from your User Profile then choose Manage Search Exports. You may also select the **Manage Search Exports** option from the **Export All** drop-down button on a search results page.

Search Purchase Orders Save As Pin Filters Export All

Created Date: Last 90 days | microscope

1-16 of 16 Results

Select Manage Search Exports

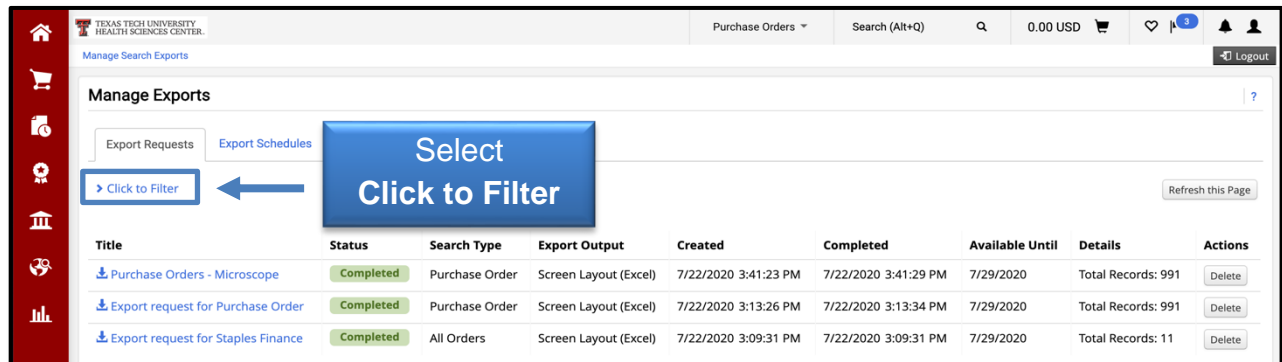
PO Number	Supplier	Date	Status	PO Number	Shipment Status	M	Total Amount
P0812739	Micro Service Southwest	7/15/2020 2:15:09 PM	Completed	133773430	Sent To Supplier	No Matches	4,450.00 USD
TB863855	Micro Service Southwest	5/13/2020 10:41:51 AM	Pending	131964817	No Shipments	No Matches	1,000.00 USD

Export All dropdown menu:

- Export All
- Export-Selected Rows
- Manage Search Exports**
- Manage Scheduled Exports

TechBuy – Export Searches

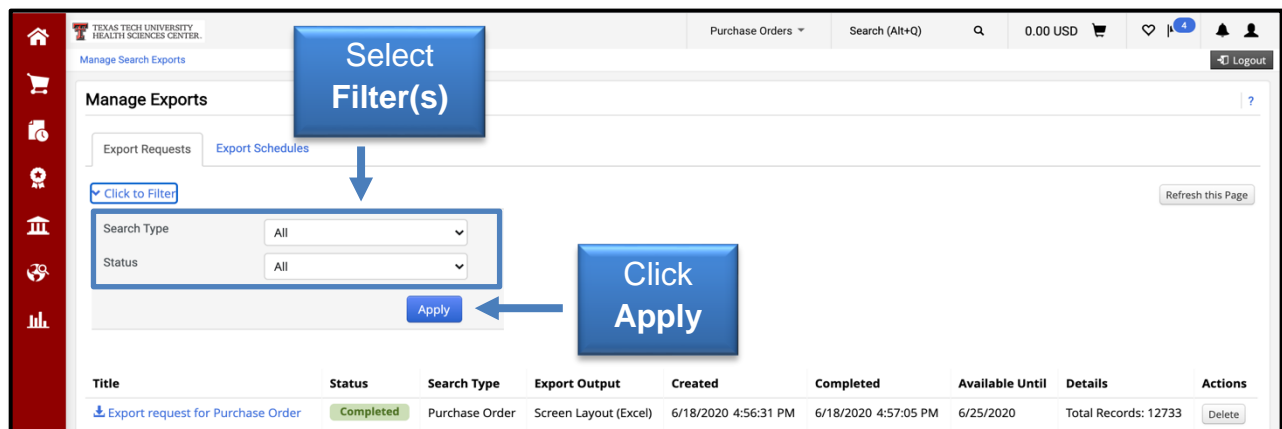
If there are several exports, you may want to filter them to locate the export you want to download. Select the **Click to Filter** link.



Use the export filter options to narrow down the history entries to a specific search type or status.

- Search Type – Select to filter exports by document type. The default is All.
- Status – Select to filter exports by status. The default is All.

Click **Apply** after selecting your export filter option(s).



Click the **Title** for the export you want to download. The file may then be opened and/or saved to your computer.

After you have downloaded the file, you can choose to remove it from the exports. Click the **Delete** button under the Action column for the appropriate export file.

TechBuy – Export Searches

Manage Exports

Export Requests Export Schedules

Click to Filter

Search Type

Status

Click Title to open/save

Click Delete to remove

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Purchase Orders - Microscope	Completed	Purchase Order	Screen Layout (Excel)	7/22/2020 3:41:23 PM	7/22/2020 3:41:29 PM	7/29/2020	Total Records: 991	Delete
Export request for Purchase Order	Completed	Purchase Order	Screen Layout (Excel)	7/22/2020 3:13:26 PM	7/22/2020 3:13:34 PM	7/29/2020	Total Records: 991	Delete

Export Schedules

In the Manage Exports section, you may also create Export Schedules for any document types, as long as you have a Saved Search for that document type. In the Export Schedules tab, select **Create Schedule for...** and then choose a **Section** that you want to schedule for export.

Keep in mind, you will need to have already created templates or Saved Searches for the sections in order to have options to choose from.

Note: The AP Requests and Procurement Requests sections do not provide any functionality for users at this time.

Manage Exports

Export Requests Export Schedules

Click to Filter

No export schedules found

Select Create Schedule for...

Choose Section

Create Schedule for...

- All Orders
- AP Requests
- Invoice
- Procurement Requests
- Purchase Order
- Receipt
- Requisition

From the Schedule Export screen, you will begin to make your selections regarding your specific export. Determine the **document** you want to schedule from the **Search To Export** drop-down list.

Select from the **Type** of exports including Screen Layout, Full Export, Transaction Export and User Defined Template. If User Defined Template is selected, you may choose from templates that you have created.

TechBuy – Export Searches

You may change the defaulted **Starts On**, **Frequency**, **Occurs Every**, and **Export Until** for the schedule. These filters mean a Scheduled Export will run based on the date range, day or specific date you create for it. When setting a schedule, you may set the export as recurring, with a specific expiration date, or with no end date.

Once all the required information is selected, click **Save**.

The screenshot shows the 'Schedule Export' form with the following fields and annotations:

- Select Document:** A blue box with a downward arrow pointing to the 'Search To Export' dropdown menu.
- Select Type:** A blue box with an upward arrow pointing to the 'Type' dropdown menu.
- Search Type:** A button labeled 'Purchase Order'.
- Search To Export *:** A dropdown menu showing 'Purchase Orders - BA'.
- Type *:** A dropdown menu showing 'Screen Layout'.
- Format:** A button labeled 'Excel'.
- Starts On *:** A date field showing '06/20/2020' with a calendar icon.
- Frequency *:** A dropdown menu showing 'Monthly'.
- Occurs Every *:** A field showing '1' and 'month(s)'.
- By the Week and Day of the Month:** A dropdown menu.
- On The *:** A field showing 'First' and 'Monday'.
- Export Until *:** A field with three options: 'Ends After 1 occurrences' (selected), 'Ends By' (with a calendar icon), and 'No End Date'.
- Click Save:** A large blue button with a rightward arrow pointing to a smaller 'Save' button.

* Required

Scheduled exports will be located in the Export Schedules tab of the Manage Search Exports section. If you have additional questions, please contact Procurement Services at purchasing@ttuhsc.edu.