



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 contained 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.

You can perform a Quick Search or an Advanced Search:

- Quick Search – allows you to perform a variety of searches from anywhere within the TechBuy application by entering a number or keyword in the Search field. The Search field is available in the application header or from the Orders menu navigation.
- Advanced Search – allows you to use the filter options to perform a more specific search and offers you the ability to pin the filters so that they become your default filters when you come back to the page.

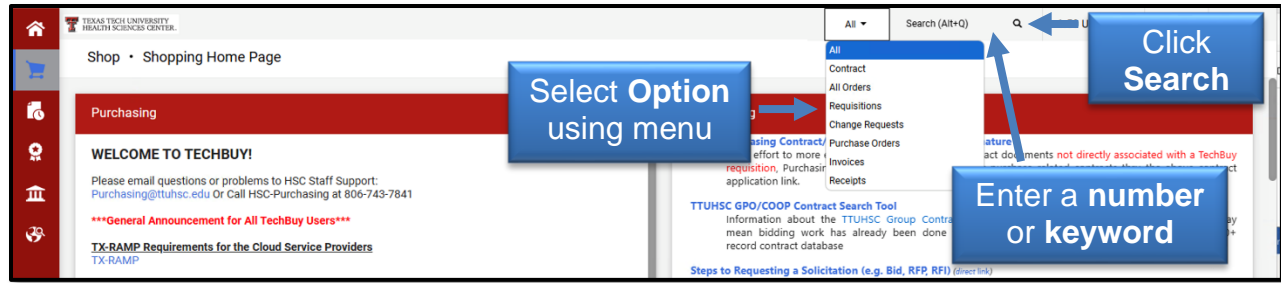
Quick Search

Quick Search provides a faster way to perform some searches. To conduct a Quick Search from the Shopping Home Page, select from the following **Options** using the drop-down menu:

- All
- Contract
- All Orders
- Requisitions
- Purchase Orders
- Invoices
- Receipts

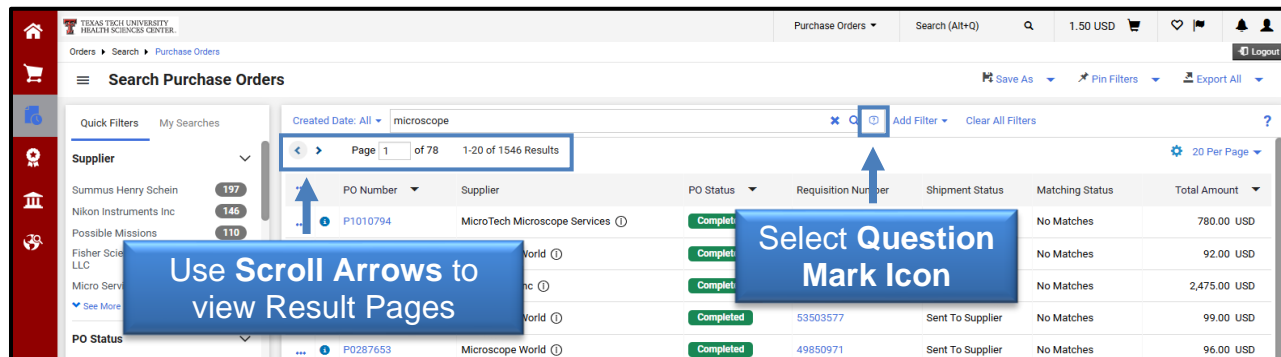
Next, enter a **number** or **keyword** in the textbox and click the **Search** icon or press **Enter/Return** on your keyboard.

TechBuy – Types of Document Searches



You will automatically be taken to any matching search results. Use the left-to-right **scroll arrows** to view any of the multiple pages of results.

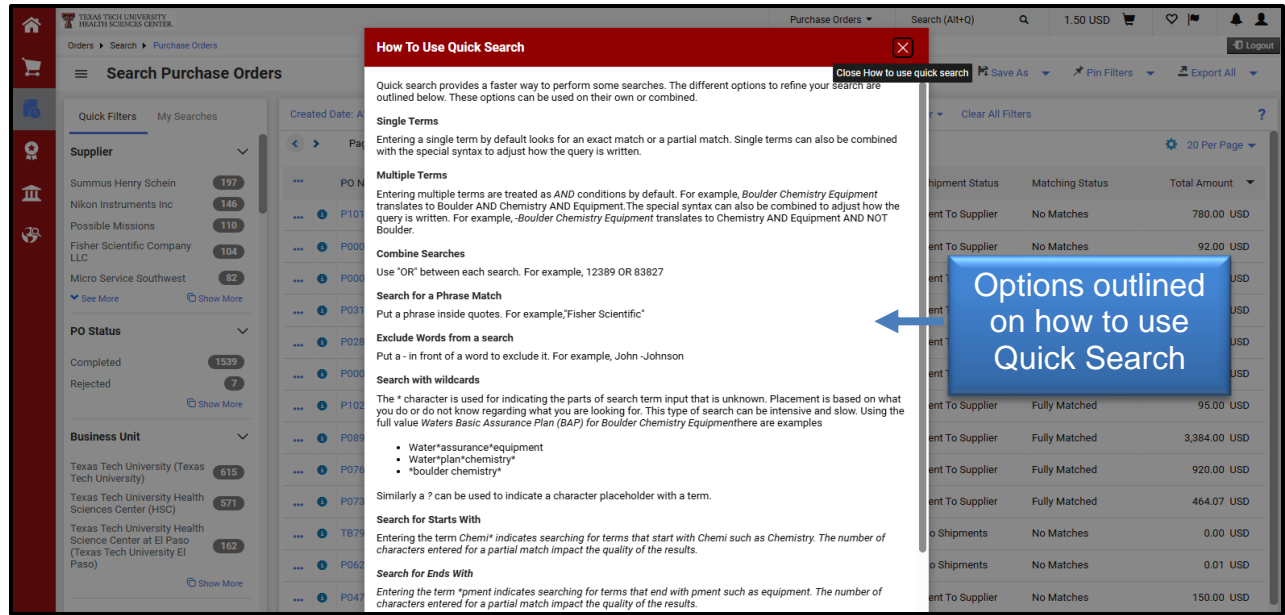
To help refine your Quick Search, select the **question mark icon** next to the text box.



Some of the helpful tips include:

- Combine Searches – Use “OR” between each search. For example, 12389 OR 83827
- Search for an Exact Match – Put a phrase inside quotes. For example, “Fisher Scientific”.
- Exclude Words from a Search – Put a – in front of a word to exclude it. For example, John-Johnson
- Search for Wildcards – Put an * in your word as a placeholder. For example, 123*98.
- Search for Placeholder – Put one or more ? as a placeholder. For example, 1234??6

TechBuy – Types of Document Searches



Quick Filters are available to help further narrow search results by including specific criteria. As you select the available Quick Filters, the details of the search are updated with the chosen search criteria.

Quick Filters will depend on the type of search conducted. Examples of filters include:

- Approved By
- Business Unit
- Contract Type
- Department
- Form Type
- Invoice Status
- Item Type
- Matching Status
- Participant
- Prepared By
- Prepared For
- Product Category
- Product Flags
- Receipt Status
- Status Flags
- Supplier

To view the entire list of options for a Quick Filter, select the **See More** link. The arrows alongside each Quick Filter allow you to open and close each filter.

Quick Filters may be added in two ways. First, click an **Option** below any of the Quick Filters. This approach only allows you to add one option per Quick Filter category. For example, click Texas Tech University Health Sciences Center (HSC) below the Business Unit Filter. This option will then be added as the Business Unit Quick Filter.

The filters will display just above the search results. You may click the **Filter Arrow** next to a specific filter to display and alter your filter selection.

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This screenshot shows the 'Search Purchase Orders' page in the TechBuy system. The interface includes a sidebar with 'Quick Filters' for Supplier, Department, PO Owner, Prepared By, and Invoice Status. The main area displays a list of search results with columns for PO Number, Supplier, PO Status, Requisition Number, Shipment Status, Matching Status, and Total Amount. Annotations include:

- Filter(s) Added to Search:** Points to the filter bar at the top showing 'Created Date: All' and 'microscope'.
- Select See More:** Points to the 'See More' link in the Supplier filter.
- Select Arrows to open/close Quick Filters:** Points to the expand/collapse arrows in the filter sidebar.
- Click Option:** Points to the 'Fully Invoiced' option in the Invoice Status filter.

PO Number	Supplier	PO Status	Requisition Number	Shipment Status	Matching Status	Total Amount
P1010794	MicroTech Microscope Services	Completed	166208847	Sent To Supplier	No Matches	780.00 USD
P1021616	Microscope World	Completed	168270712	Sent To Supplier	Fully Matched	95.00 USD
P0736041	Microscope LLC	Completed	120913960	Sent To Supplier	Fully Matched	464.07 USD
P1181708	MicroTech Microscope Services	Completed	196109078	Sent To Supplier	Fully Matched	650.00 USD
P1181708	MicroTech Microscope Services	Completed	181568571	Sent To Supplier	Partially Matched	720.00 USD
P0736041	Microscope LLC	Completed	139408576	Sent To Supplier	Fully Matched	720.00 USD
P0736041	Microscope LLC	Completed	128459213	Sent To Supplier	Fully Matched	720.00 USD
P0773635	MicroTech Microscope Services	Completed	126626612	Sent To Supplier	Fully Matched	115.20 USD
P0732226	MicroTech Microscope Services	Completed	120075276	Sent To Supplier	Fully Matched	2,340.00 USD
P0703816	MicroTech Microscope Services	Completed	114824023	Sent To Supplier	Fully Matched	715.00 USD

The second way to attach Quick Filters to a search allows you to add multiple or all of the available options within a filter. Select the **Show More** link for a Quick Filter.

This screenshot shows the 'Search Purchase Orders' page with the 'Show More' link highlighted in the Supplier filter. The 'Show More' link is located next to the 'See More' link. The main area displays a list of search results with columns for PO Number, Supplier, PO Status, Requisition Number, Shipment Status, Matching Status, and Total Amount.

You'll be able to check the options within the Quick Filter you want to apply to help narrow your search. You may also choose a single item, multiple items, or all options in the Quick Filter by clicking **Select All**. After making your selections, click **Apply**.

This screenshot shows the 'Invoice Status Quick Filter' dialog box. It contains a 'Select All' button, a list of options with checkboxes, and an 'Apply' button. The options are:

- ☐ Fully Invoiced (350)
- ☐ No Invoices (88)
- ☐ Over Invoiced (17)
- ☐ Partially Invoiced (113)

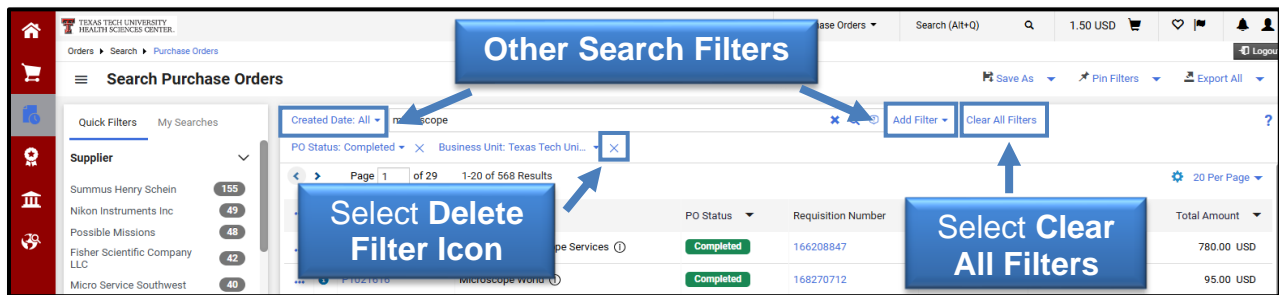
Annotations include:

- Click Select All:** Points to the 'Select All' button.
- Check Options:** Points to the list of options.
- Click Apply:** Points to the 'Apply' button.

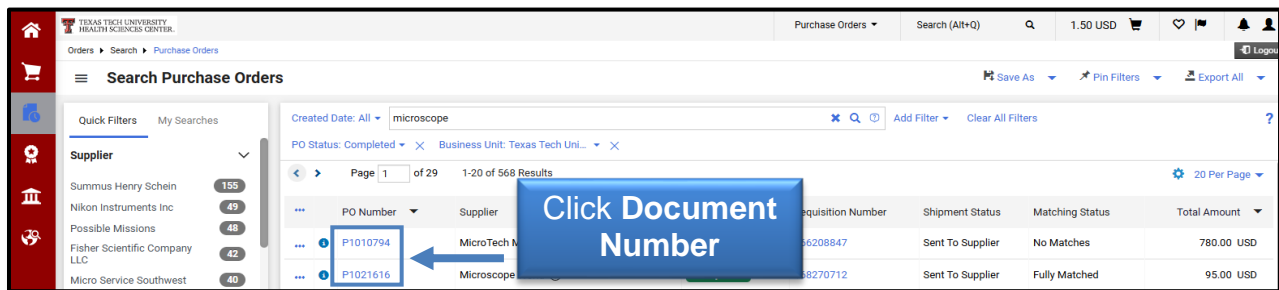
TechBuy – Types of Document Searches

If you need to remove Quick Filters, click the **Delete Filter** icon next to the specific filter name or select the **Clear All Filters** button to remove all filters.

You may also use the search filters displayed near the top of the screen to help with your document search results. The filter criteria available will depend on the type of document you are searching for. These filters will be explained in more detail in the Advanced Search section.



When you locate the document you need from the search results, click the **document number** to view the file.



Once the document opens, you may navigate to the other search results using the **arrow buttons** or select the **Results** drop-down menu to display links to the other document numbers. You will stay on the document in edit mode without ever having to return to your search results.

To return to the search results page, click the **Back to Results** from the drop-down menu.

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Use **Arrow** buttons to navigate to other documents

Click **Back to Results**

Select from the **Results** drop-down

2 of 568 Results

Back to Results

P1010794

P1021616

P0736041

P1181708

P1100488

P0851787

P0782904

P0773635

P0732226

P0703816

P0529655

P0492999

P0968901

P0557879

P0551886

Quick Search for All Orders

Another way to perform a quick search for All Orders is by opening the **Orders** menu navigation. Enter a **number** or **keyword** in the Quick Search text area. Click the **Search** icon or press **Enter/Return** on your keyboard.

Click **Search**

Enter Number or Keyword

Quick search

Orders

Search

My Orders

All Orders

Requisitions

Purchase Orders

Minor Purchasing Contract/Agreement Submission for Signature

TTUHSC GPO/COOP Contract Search Tool

Steps to Requesting a Solicitation (e.g. Bid, RFP, RFI)

The Quick Search will provide search results for All Orders. You may then apply filters to narrow the search, if needed.

Search Results from All Orders

Search All Orders

Quick Filters

My Searches

Type of Order: All

Created Date: All

1217889

1-6 of 6 Results

20 Per Page

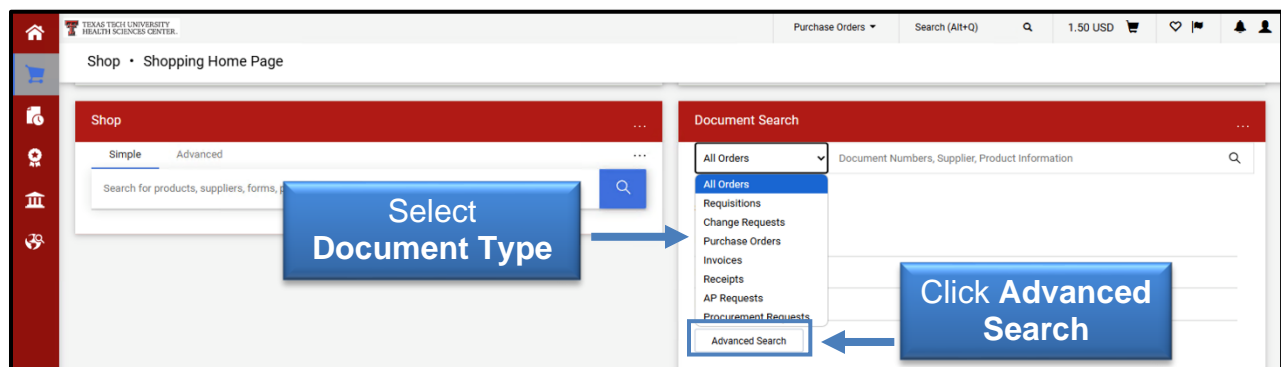
Order Identifier	Type	Order Status	Created Date/Time	Completed Date	Supplier	Total Amount
48870800	Receipt	-	6/24/2025 8:48:31 AM	6/24/2025 8:48:33 AM	Summus Henry Schein	
V8683496	Invoice	Pending	6/23/2025 2:33:24 PM		Summus Henry Schein	12,007.38 USD
P1217889	Purchase Order	Complete	6/9/2025 11:13:31 AM	6/9/2025 11:17:57 AM	Summus Henry Schein	16,792.66 USD
202493273	Requisition	Complete	6/6/2025 10:33:32 AM	6/9/2025 11:13:32 AM	Summus Henry Schein	16,792.66 USD

TechBuy – Types of Document Searches

Advanced Search

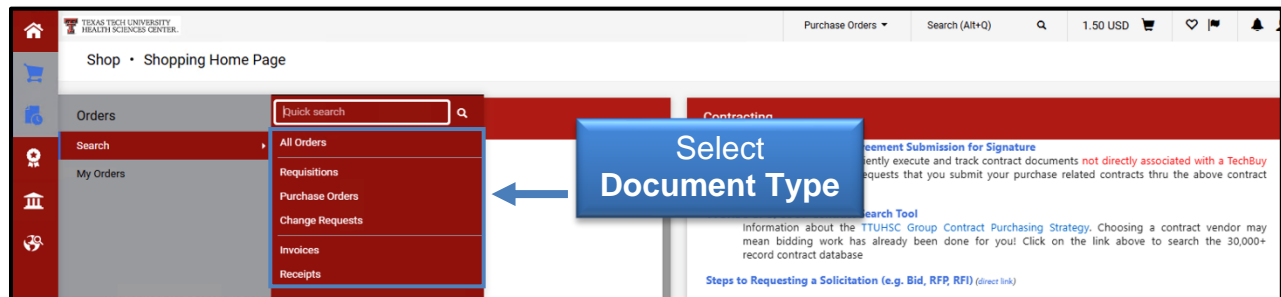
Advanced Search offers you the option to enter very specific, detailed search criteria. As you select different document types, the Advanced Search fields change and are specific to that document type. When you know up front what criteria you are looking for, with Advanced Search, you can pre-select those criteria.

You have two ways to begin an Advanced Search. From the Home page, scroll to the Document Search sections. Select the **Advanced Search** link. This will take you to the appropriate search page.



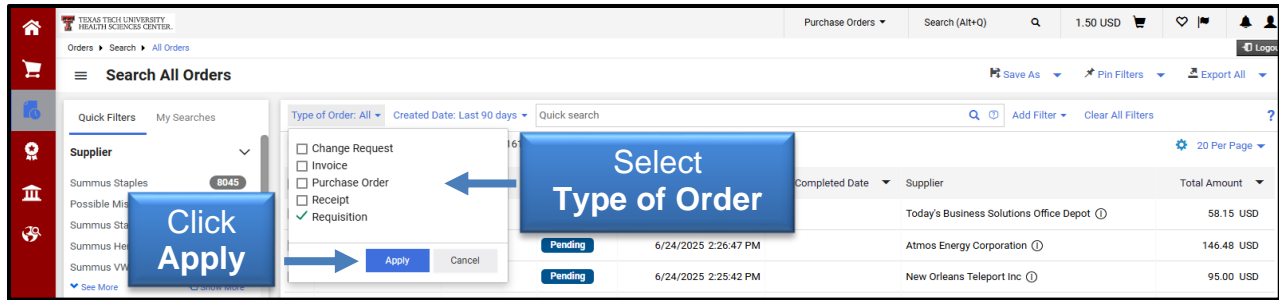
You may also access an Advanced Search by clicking the **Orders** icon from the left navigation menu on the Shopping Home Page, and then clicking **Search**. This provides access to search pages for All Orders and specific types of documents including: Requisitions, Purchase Orders, Change Requests, Invoices and Receipts.

Selecting any of these document types will give you a more focused search and specific filters related to that document type.

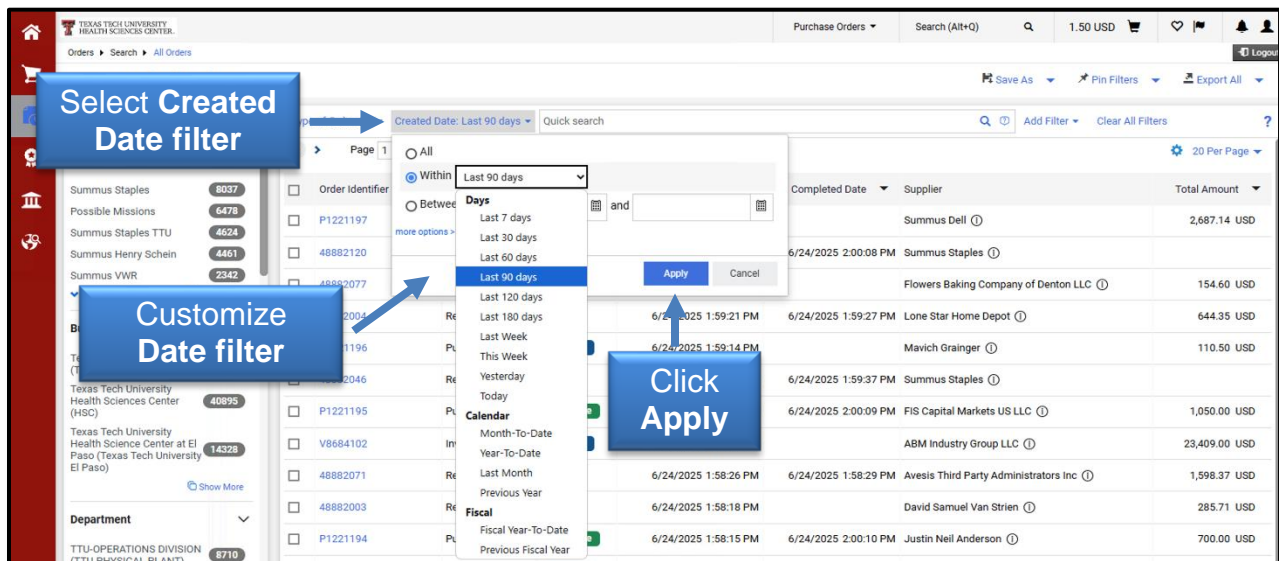


The **Type of Order** filter is available when you search All Orders. You will be able to narrow your search to specific document types using the drop-down menu. Once you have made your selection, click **Apply**.

TechBuy – Types of Document Searches



By default, the search results show documents for the last 90 days. You may change the search results to show a different date range by selecting the **Created Date** filter. After you customize your time frame or select from the pre-determined time limits, click **Apply**.

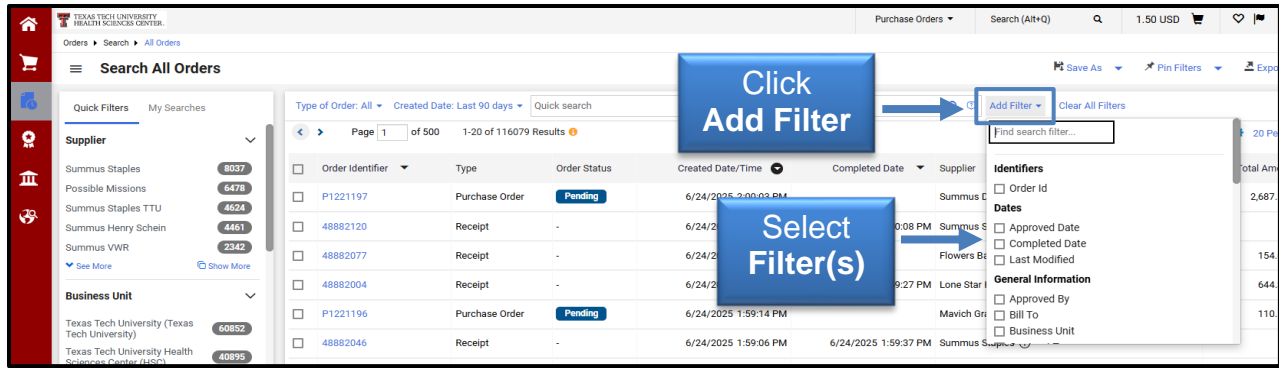


You may add multiple filters or columns to a search by clicking the **Add Filter** drop-down button. Depending on the document type, a list of available filters will display in these categories:

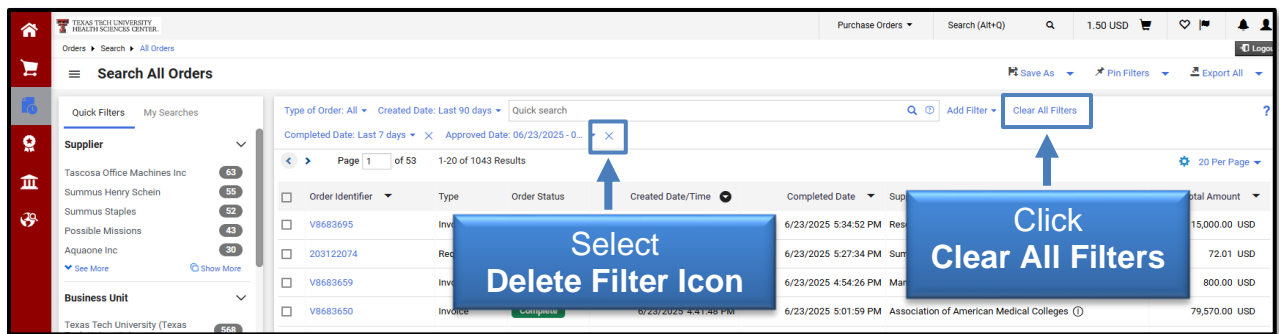
- Identifiers
- Dates
- General Information
- Item Details
- Properties
- Custom Fields

Select the **Filter(s)** that you want to add by checking the box next to the filter. You may also search for a specific filter by entering a value in the **Find search filter** field.

TechBuy – Types of Document Searches

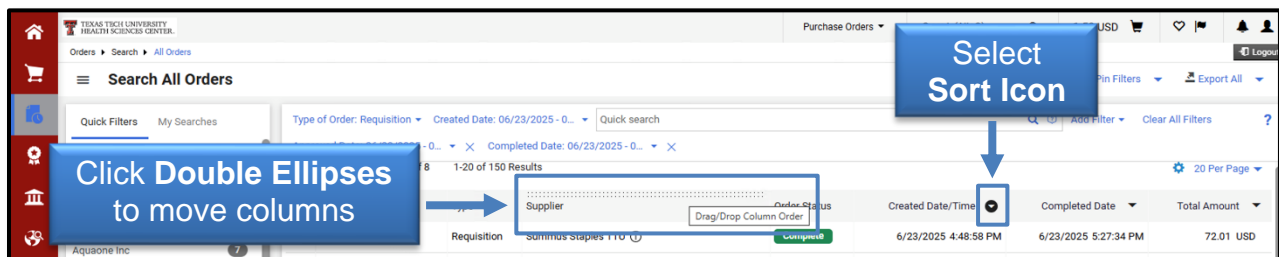


To remove a filter, select the **Delete Filter** icon next to the specific filter name or you may click the **Clear All Filters** button to remove all filters.



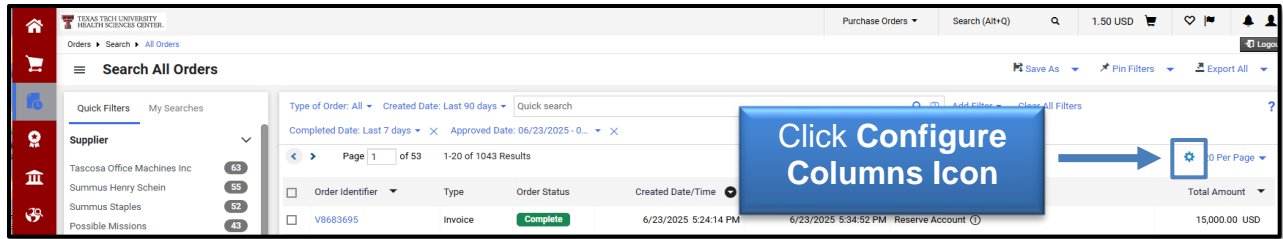
You may sort search results by columns in ascending or descending order by selecting the **sort** icon next to the column.

You may also move column(s) left and right by hovering immediately above the column title and revealing a line of double ellipses. Click the **double ellipses** to drag and drop column(s) either left or right to the desired location.



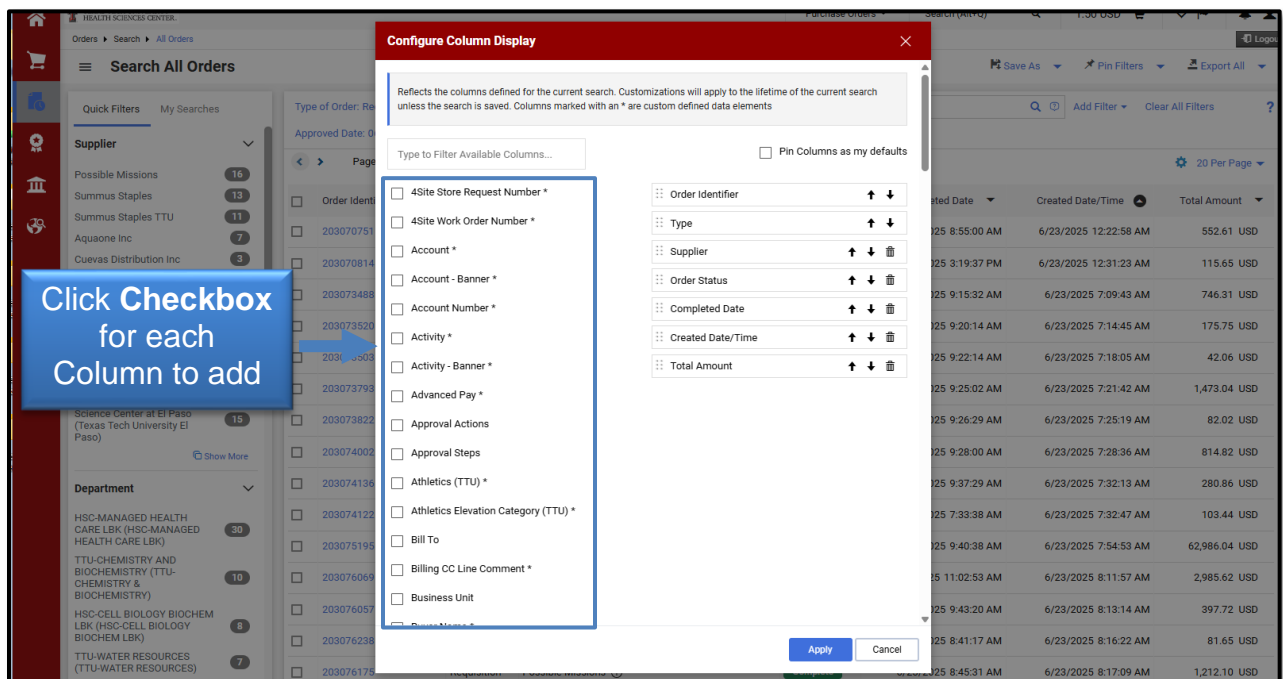
You have the ability to choose the columns that display in the search results and the order in which they display by configuring the search results columns. Click the **Configure Columns** icon to access the Configure Column Display screen.

TechBuy – Types of Document Searches



All available columns are listed on the left, and a list of selected columns displays on the right. You can determine the sort order on a search results page.

To add a column, locate the column by scrolling through the list or entering a value in the search field. Click the **checkbox** for each column you would like to add from the available column list on the left.



The columns are automatically added to the bottom of the selected columns list on the right. If a column needs to be deleted, locate the column from the list on the right side, and click the **trash can** icon. The column is moved back to the available columns list.

To configure the columns for the search results, click and drag the columns to the desired location or use the up and down arrows.

TechBuy – Types of Document Searches

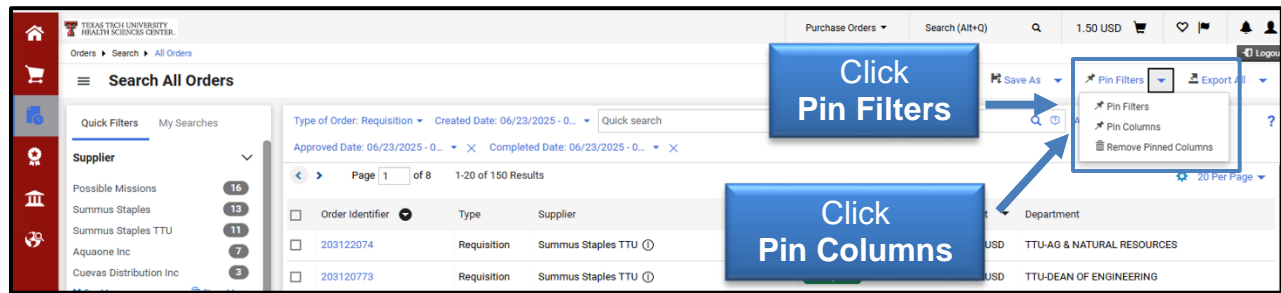
The screenshot shows the 'Configure Column Display' dialog box in the TechBuy system. The dialog has a title bar 'Configure Column Display' and a close button. Below the title bar, there is a text area explaining that the columns are defined for the current search and customizations will apply unless saved. A checkbox 'Pin Columns as my defaults' is visible. The main area is divided into two columns: 'Type to Filter Available Columns...' on the left and a list of columns on the right. The columns on the right include 'Order Identifier', 'Type', 'Supplier', 'Order Status', 'Total Amount', 'Account *', and 'Activity - Banner *'. Each column has up/down arrows for sorting and a trash icon for deletion. A blue callout box on the left says 'Added items will move to the bottom of columns list' with an arrow pointing to the bottom of the column list. A blue callout box on the right says 'Click/Drag or use Arrows to move Columns' with an arrow pointing to the column list. Another blue callout box on the right says 'Click Trash Can to Delete' with an arrow pointing to the trash icon of the 'Total Amount' column.

By default, the updated selected and sorted columns only display for the life of the current search. If you would like to keep the column configuration for all searches going forward, select the **Pin Columns as my defaults** checkbox.

This screenshot shows the 'Configure Column Display' dialog box with the 'Pin Columns as my defaults' checkbox selected. A blue callout box with the text 'Select Pin Columns as my defaults' has an arrow pointing to the checkbox. The rest of the dialog box, including the column list and the 'Apply' button, is visible.

TechBuy – Types of Document Searches

You may also save the columns in their current order from a search results page. Select the **Pin Filters** drop-down menu and then click **Pin Columns**. Click **Yes** to default the configuration each time you return for a search in that section.

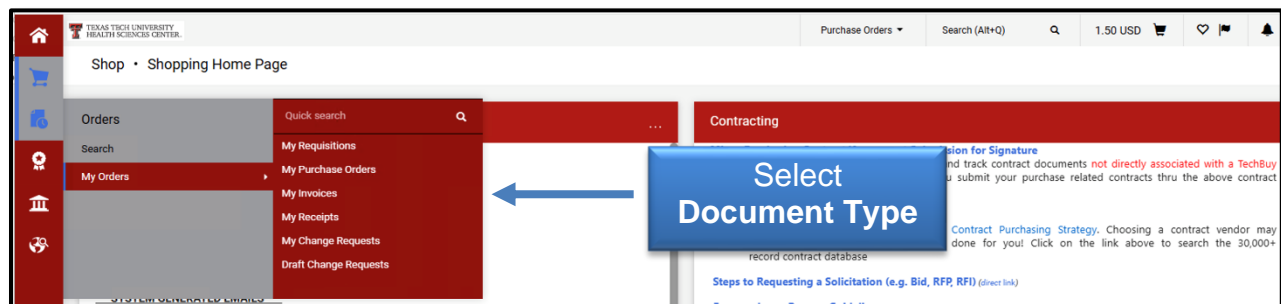


My Orders

From the My Orders Menu Navigation, you may search for your documents by choosing one of the document types:

- My Requisitions
- My Purchase Orders
- My Invoices
- My Receipts
- My Change Requests
- Draft Change Requests

Using these sections allows you to take advantage of the date range options and the post-search filters 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. These sections will also contain your Favorite Saved Searches. Select a **document type**.



If any of the documents match your search, they will display. For example, if you have no purchase orders that list you as the owner in the last 90 days, no results will display.

You may try modifying your search criteria by removing/adding filters.

TechBuy – Types of Document Searches

The screenshot shows the 'My Purchase Orders' page in the TechBuy system. A search filter 'Created Date: Last 90 days' is highlighted with a blue box. A blue callout box with the text 'Modify Search Criteria by Changing Filters' and an arrow points to the search filter area. The table below shows two results:

PO Number	Supplier	PO Status	Requisition Number	Total Amount
TB004894	Possible Missions ⓘ	Pending	4298841	13.81 USD
TB004893	Summus VWR ⓘ	Pending	4302962	8.34 USD

For questions, please contact Procurement Services at purchasing@ttuhsc.edu.