



## 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.

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.

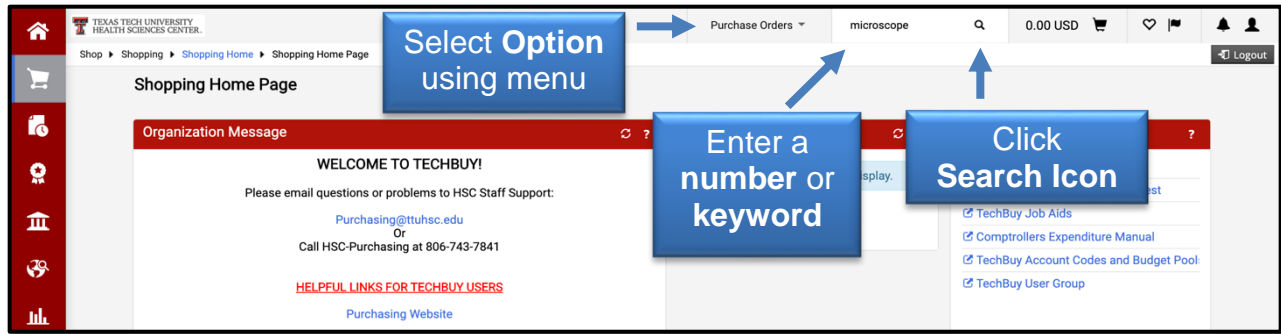
## Quick Search

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.

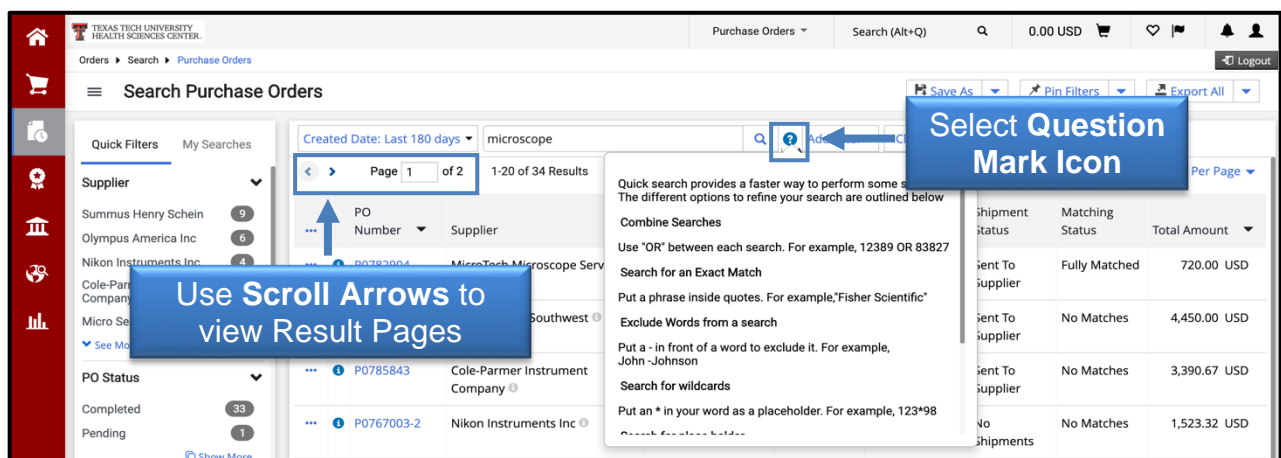
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You will automatically be taken to any matching search results. Use the left to right scroll arrows to view any of the multiple pages of results.

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



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.

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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 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.

The screenshot shows the 'Search Purchase Orders' page. On the left, the 'Quick Filters' sidebar is visible. Annotations include:

- A blue box labeled 'Click Option' points to the 'See More' link under the 'Supplier' filter.
- A blue box labeled 'Click Filter Arrow' points to the 'Filter Arrow' icon next to the 'Business Unit' filter.
- A blue box labeled 'Select See More' points to the 'See More' link under the 'Department' filter.
- A blue box labeled 'Select Arrows to open/close Quick Filters' points to the expand/collapse arrows next to the 'PO Owner' and 'Prepared By' filters.

The main search results table displays columns: PO Number, Supplier, Created Date, PO Status, Requisition Number, Shipment Status, Matching Status, and Total Amount. The results show various purchase orders from suppliers like Summus Staples and University Medical Center - UMC.

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.

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The screenshot shows the 'Search Purchase Orders' page. On the left, the 'Quick Filters' sidebar is visible. A blue callout box with the text 'Select Show More' points to the 'Show More' link at the bottom of the sidebar. The main table displays 14 results for 'microscope' searches, with columns for PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, Shipment Status, Matching Status, and Total Amount.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Shipment Status	Matching Status	Total Amount
P0812739	Micro Service Southwest	7/15/2020 2:15:09 PM	Completed	133773430	Sent To Supplier	No Matches	4,450.00 USD
P0811649	Summus Henry Schein	7/9/2020 4:51:31 PM	Completed	133613281	Sent To Supplier	Partially Matched	1,516.53 USD
P0809484	Possible Missions Fisher Scientific	6/29/2020 2:56:48 PM	Completed	133286055	Sent To Supplier	Fully Matched	379.20 USD
P0808964	Coherent Inc	6/25/2020 1:46:20 PM	Completed	133040915	Sent To Supplier	Fully Matched	11,275.00 USD
P0808329		6/23/2020 1:14:53 PM	Completed	133041010	Sent To Supplier	No Matches	24,150.00 USD
		6/22/2020 11:31:52 AM	Completed	132991141	Sent To Supplier	Fully Matched	861.67 USD

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**.

The screenshot shows the 'Department Quick Filter' dialog box. It contains a list of departments with checkboxes next to them. A blue callout box with the text 'Check Options' points to the checkboxes. Another blue callout box with the text 'Click Select All' points to the 'Select All' button. A third blue callout box with the text 'Click Apply' points to the 'Apply' button.

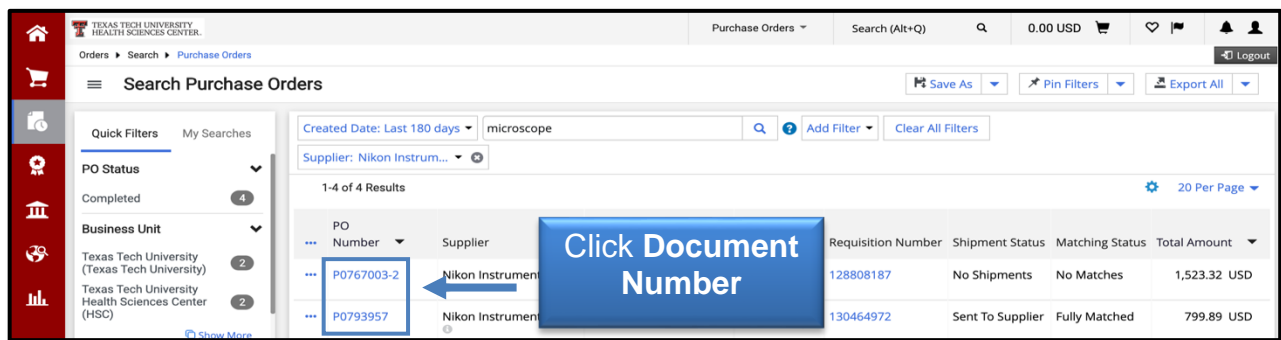
If you need to remove Quick Filters, click the **Delete Filter** icon next to the specific filter name or select the **Clear All Filters** button to remove all filters.

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.

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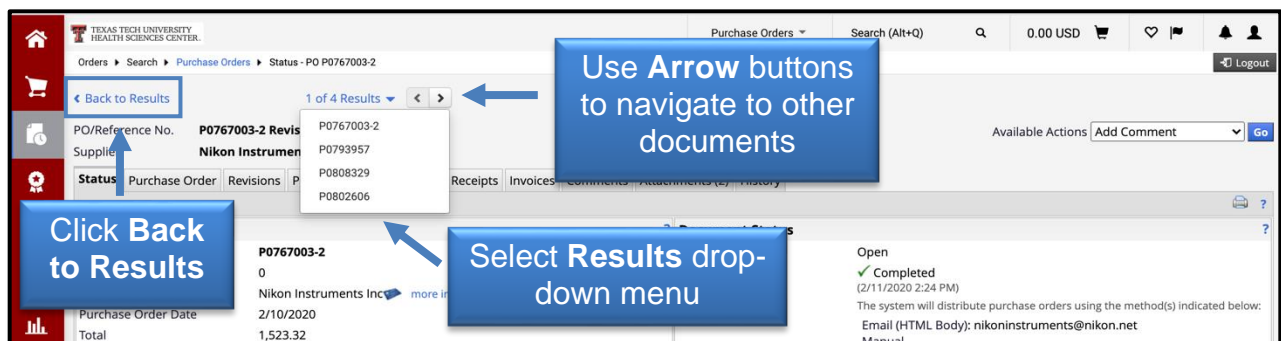


When you locate the document you need from the search results, click the **document number** to view the file.



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.

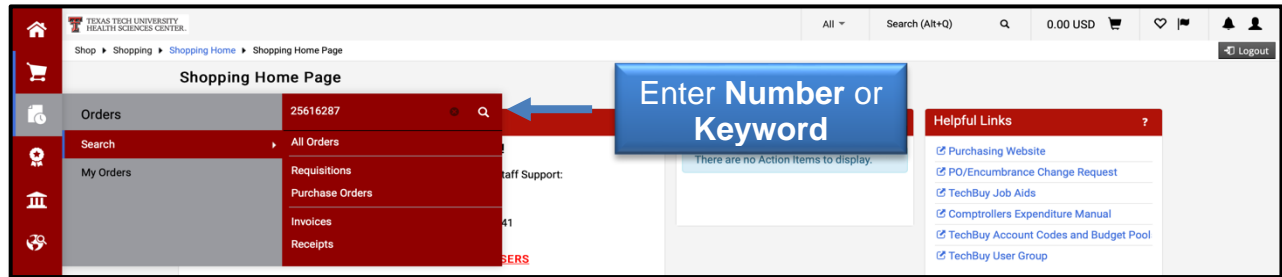
To return to the search results page, click the **Back to Results** link in the top left of the screen.



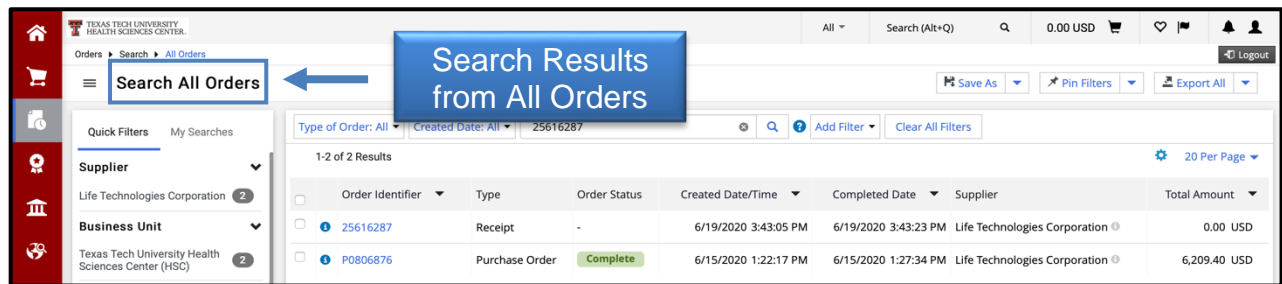
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## Quick Search for All Orders

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.



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



## Advanced Search

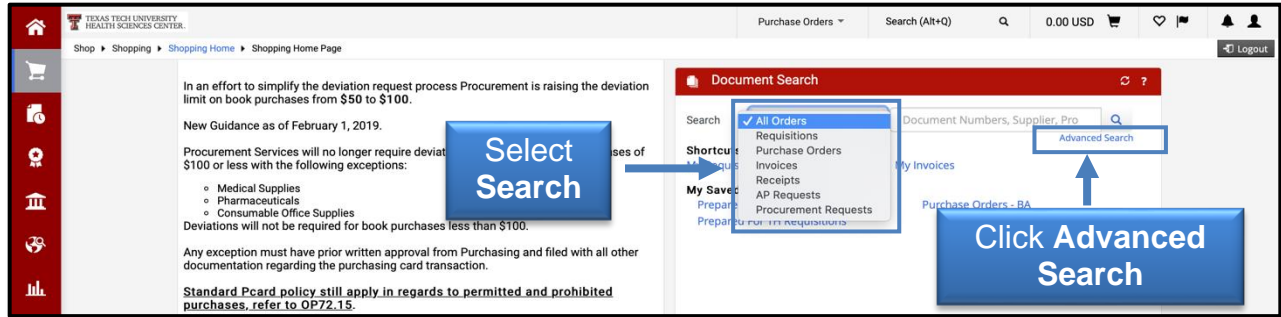
Advanced Search offers you the option to enter very specific, detailed search criteria. As you select different document types, the Advanced Search fields change and are specific to that document type. When you know up front what criteria you are looking for, with Advanced Search you can pre-select that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

You have two ways to begin an Advanced Search. From the Home page, scroll to the Document Search section on the right side. Select the **Search** you want to perform. Then, click the **Advanced Search** link. This will take you to the appropriate search page.

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



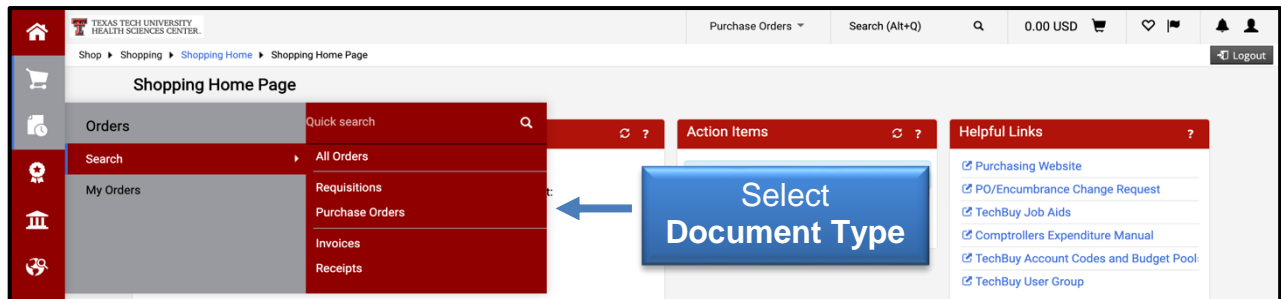
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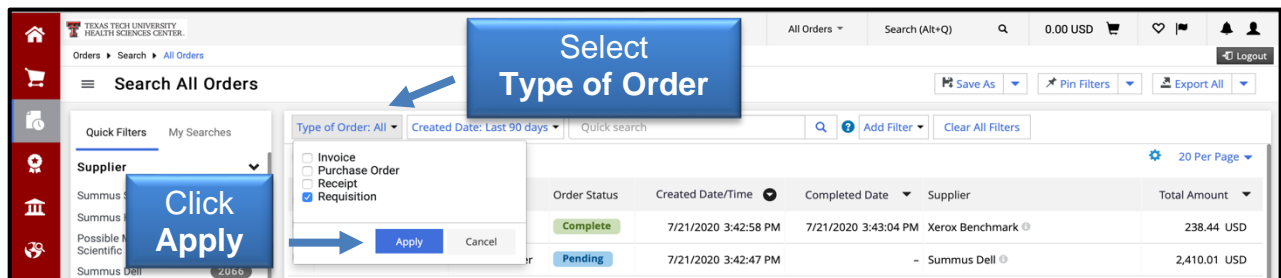
You may also access an Advanced Search, by clicking the **Orders** icon from the left navigation menu on the Shopping Home Page, and then clicking **Search**. This provides access to search pages for All Orders and specific types of documents including:

- Requisitions
- Purchase Orders
- Invoices
- Receipts

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

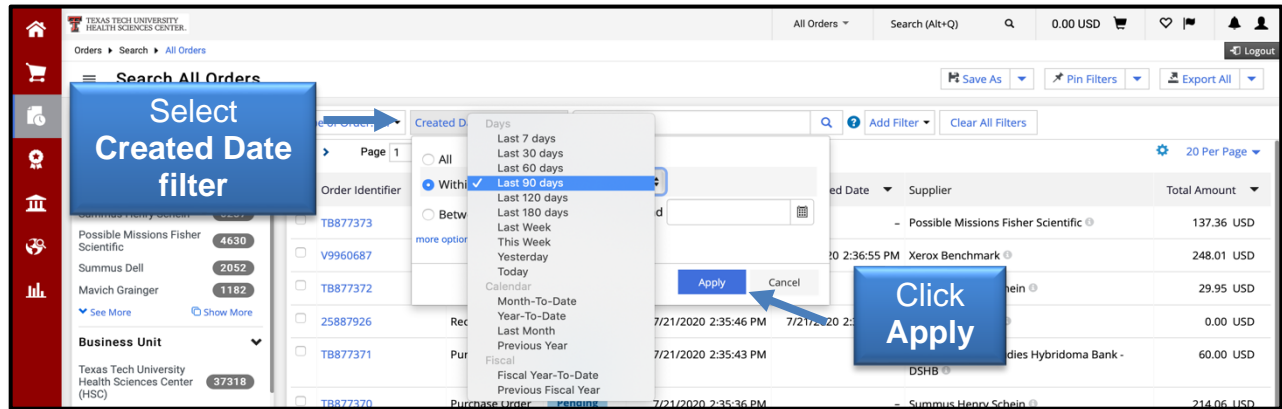


The **Type of Order** filter is available when you search All Orders. You will be able to narrow your search to specific document types using the drop-down menu. Once you have made your selection, click **Apply**.



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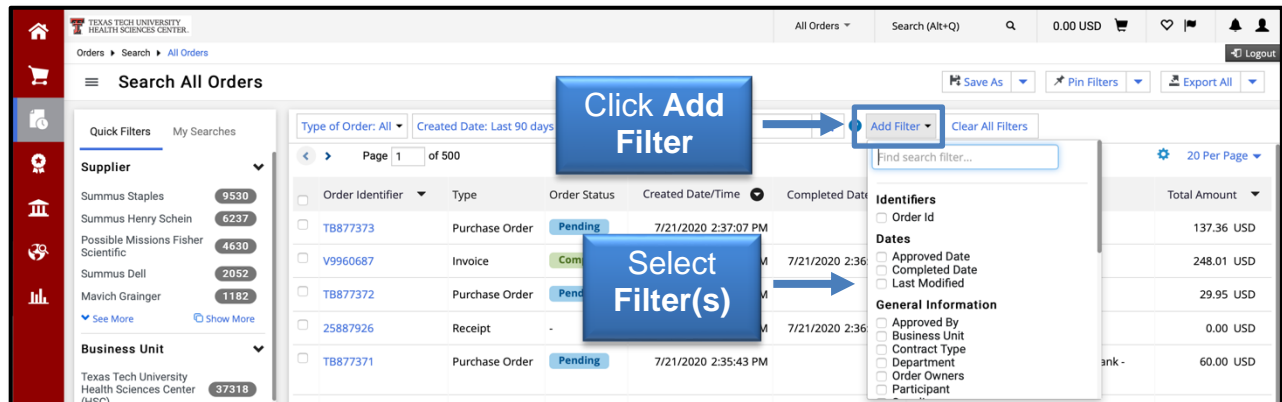
By default, the search results show documents for the last 90 days. You may change the search results to show a different date range by selecting the **Created Date** filter. After you customize your time frame or select from the pre-determined time limits, click **Apply**.



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

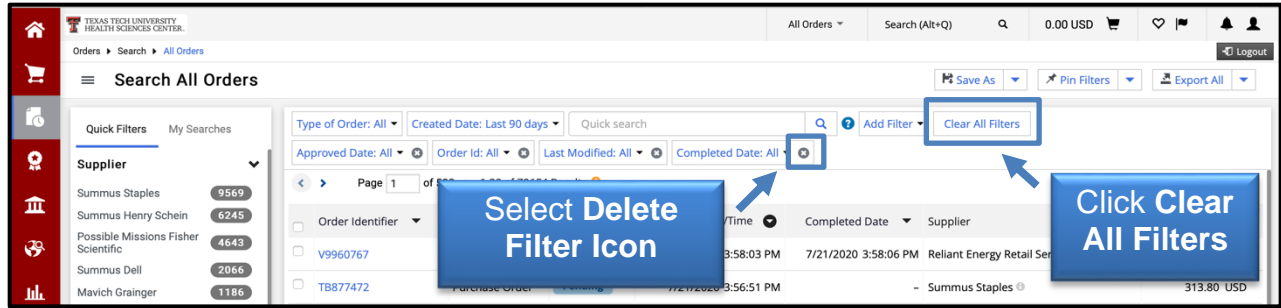
Select the **Filter(s)** that you want to add by checking the box next to the filter. You may also search for a specific filter by entering a value in the **Find search filter** field.



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.

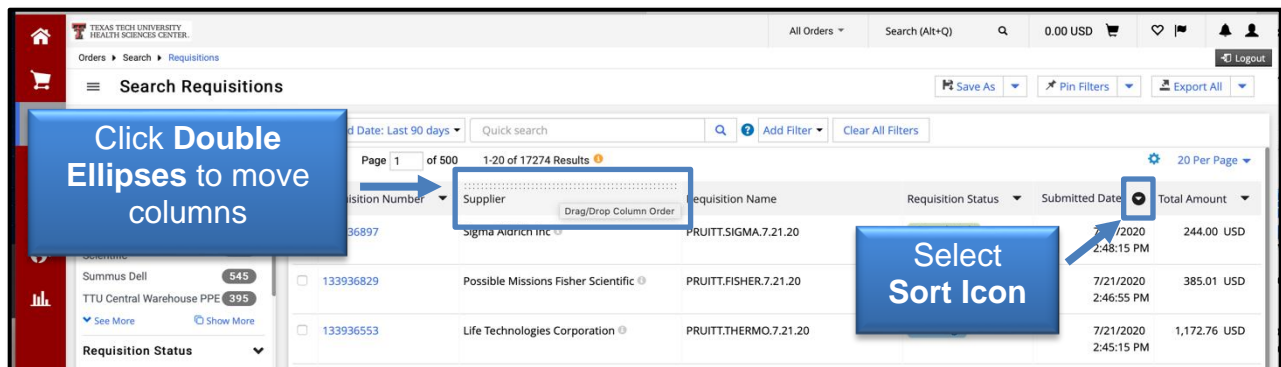


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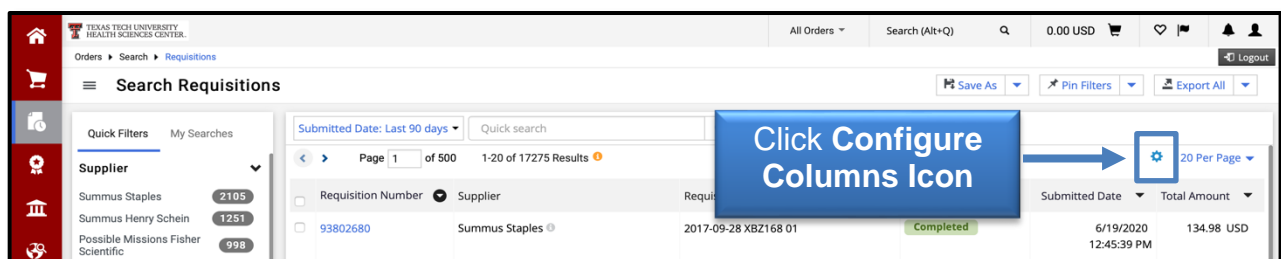


You may sort search results by columns in ascending or descending order by selecting the **sort** icon next to the column.

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.

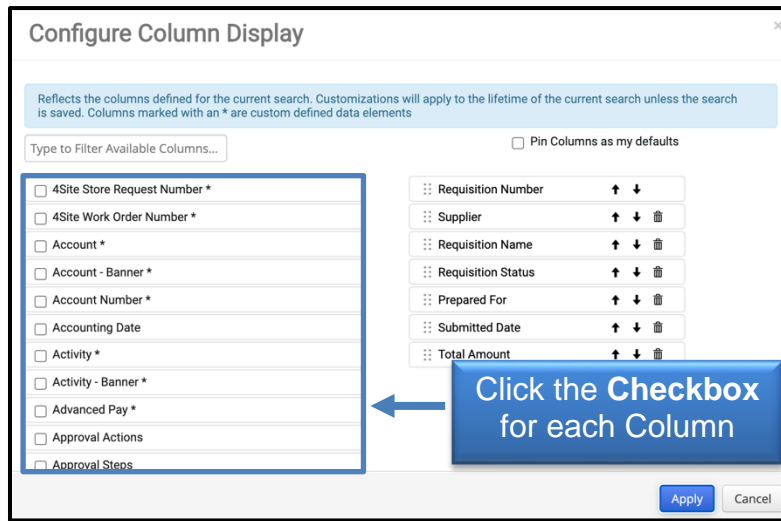


All available columns are listed on the left, and a list of selected columns displays on the right. You can determine the sort order on a search results page.

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

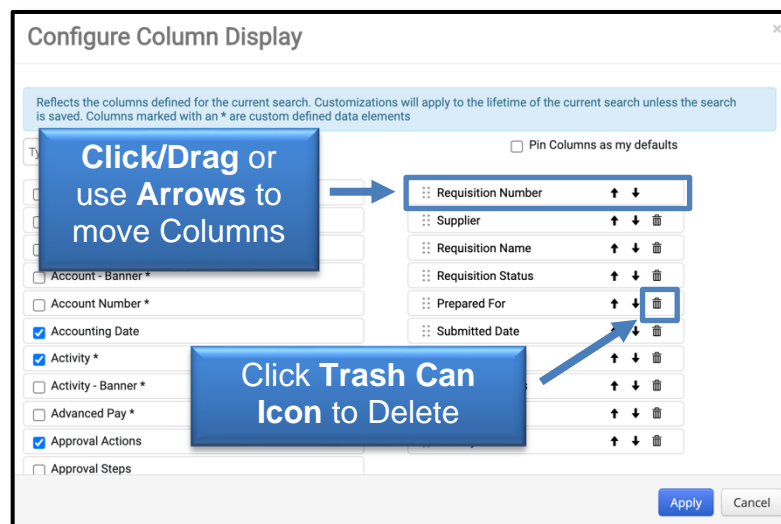
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available column list on the left. The columns are automatically added to the bottom of the selected columns list on the right.



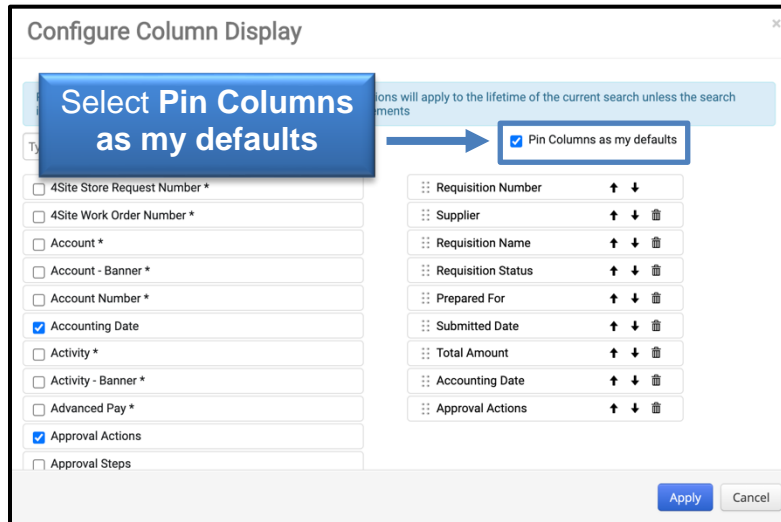
If a column needs to be deleted, locate the column from the list on the right side, and click the **trash can** icon. The column is moved back to the available columns list.

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

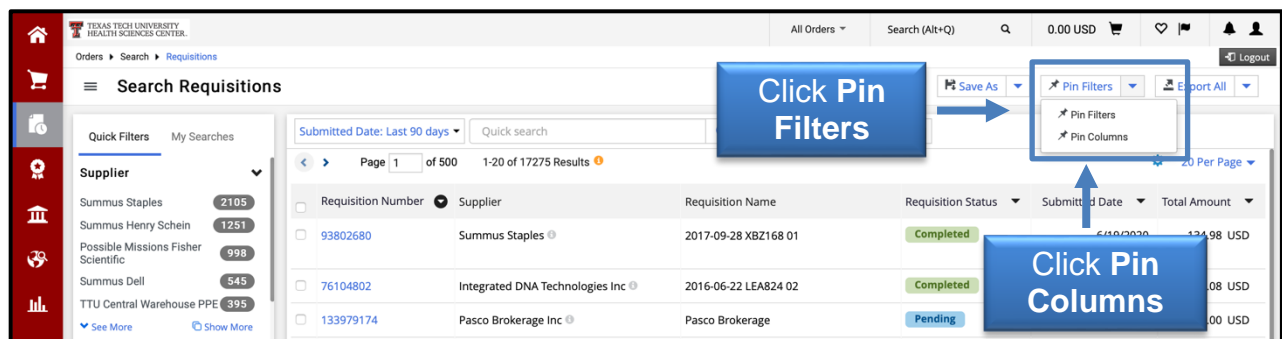


By default, the updated selected and sorted columns only display for the life of the current search. If you would like to keep the column configuration for all searches going forward, select the **Pin Columns as my defaults** checkbox.

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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.



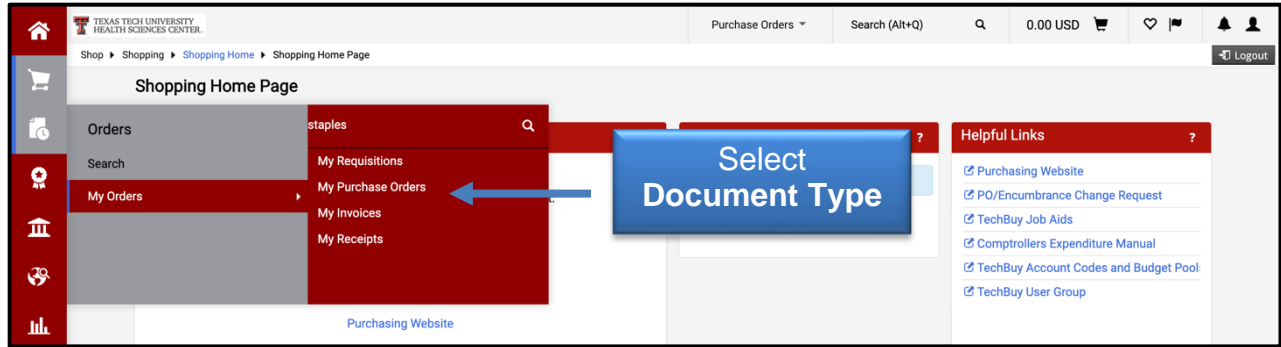
## My Orders

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

- My Requisitions
- My Purchase Orders
- My Invoices
- My Receipts

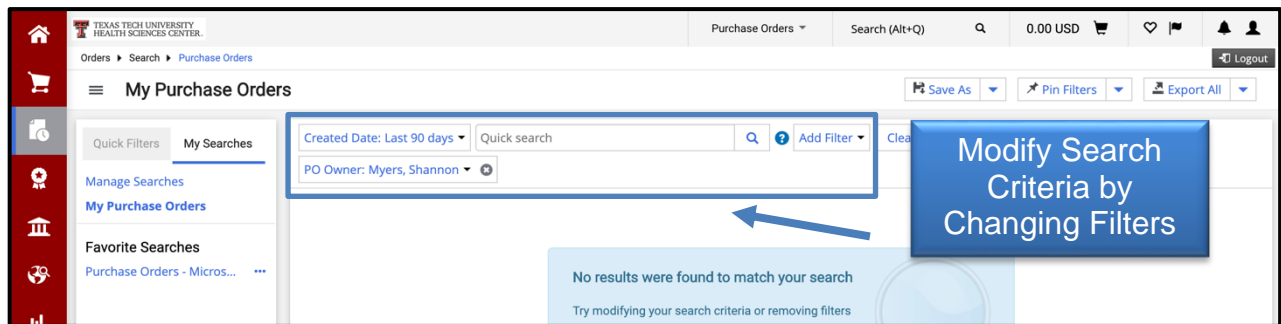
Using these sections allows you to take advantage of the date range options and the post-search filters that are available. The default date range for these links is 90 days. You will only see links and documents that you have access to. These sections will also contain your Favorite Saved Searches. Select a **document type**.

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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.



For questions, please contact Procurement Services at [purchasing@ttuhsc.edu](mailto:purchasing@ttuhsc.edu).