Document Search Concepts

Use BearBuy Document Search to find requisitions, purchase orders, vouchers (invoices), and receipts. Perform a simple search by looking for exact document numbers, partial document numbers, or search terms.

Search Terms

▶ Document Search provides a **simple search** interface where you can search *all document types* and receive *all* related requisitions, purchase orders, vouchers, and receipts in the search results. You may use search terms such as:

- ✓ requisition number
- ✓ requisition name
- ✓ purchase order number
- ✓ catalog number (SKU)
- ✓ product description
- ✓ supplier name
- ✓ contract number

- ✓ supplier invoice number
- ✓ voucher (invoice) number
- ✓ receipt number for related PO
- ✓ receipt packing slip number for related PO
- ✓ receipt tracking number for related PO
- ✓ receipt name for related PO
- ✓ individual users

Wildcards

▶ There is no need to type a wildcard character for partial number searches.

Advanced Search

▶ The **advanced search** link allows you to specify the values to filter by, such as supplier name, date range, and Custom Fields like **Procurement Dept Code** and **Fund**. You can also filter by processes such as **Workflow Status** and **Status Flags**.

Date range

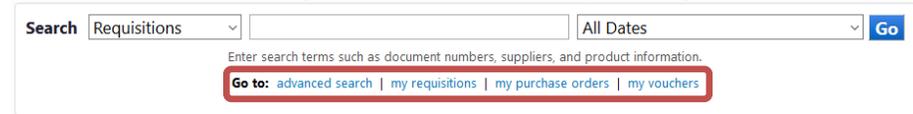▶ Click on the **All Dates** dropdown menu to select a different date range or to enter a custom date range search.

Navigate Document Search

1. From the side navigation bar, go to 🕐 **Orders > Search > Search Documents**.
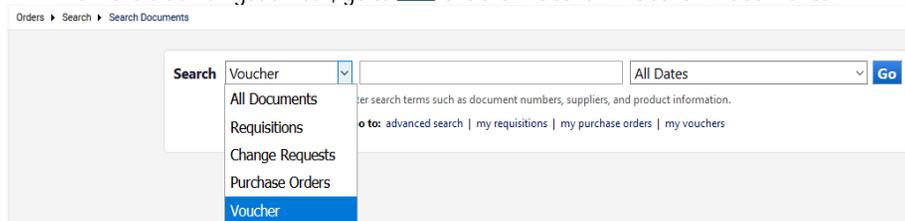
Using Go To Links

1. The **Go To** links - **my requisitions**, **my purchase orders**, and **my vouchers** can be used to search for documents you have access to from the past 90 days.

Simple Search and Filtering

1. To search by keywords, use the search field.
   a. Use the **Search ⇨ All Documents** dropdown to specify whether you are searching across **All Documents** or specific documents such as a **Requisition**, **Purchase Order**, **Voucher** (Invoice), or **Receipt**.
   b. In the **Search** field, enter information related to what you are searching for such as a part of a requisition number.
2. Click the **Go** button to search.
3. The search results are returned.
   a. The *left-hand side* shows **Search Terms** and Filters that are used to Refine Search Results.
   b. The *right-hand side* is a list showing the **Search Results**.
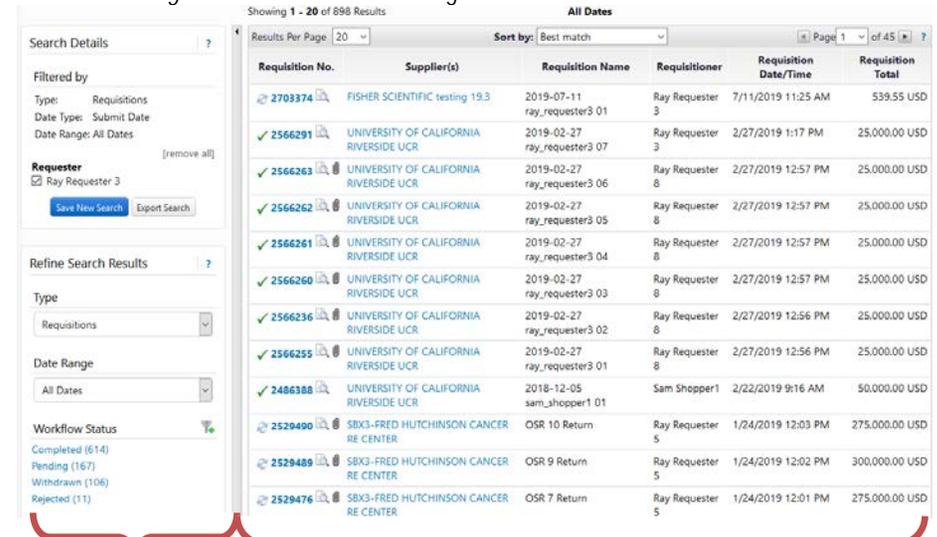
Search Terms, Filters, and Refinements.

Search Results: List of all documents meeting the specified criteria.

▶ **TIP**: If a paperclip icon 📎 appears next to the document number in the search results, this indicates there are attachments within the document. Click on the icon to view the attached documents.

4. Use the **Refine Search Results** options to filter by criteria such as *Date Range*, *Supplier*, *Requester*, or *Workflow* status.
   a. To select a single value to filter, click on the link or select a value from a dropdown.
   b. To select *multiple values* for a desired filter, click the 🔽 filter icon.
      i. Select the desired values by checking the box next to the corresponding value and then click the **Save** button
   c. To filter by values in the custom fields section, click on a value to filter by, such as the Accounting Code Department ID. A pop-up window appears. Enter the value you would like to filter search results by. Click the **Save** button.
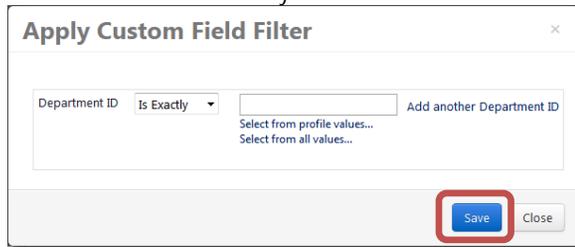
5. The Search Results are updated.

Navigate Document Search ⇨ Advanced Search

1. From the side navigation bar, go to 📇 **Orders > Search > Search Documents**.
2. Select the **advanced search** link.

3. **Advanced Search** displays.

4. The **Search Criteria for** dropdown menu lists All Documents, Requisition, Purchase Order, Voucher, and Receipt.
   a. For each selection change, the advanced search fields will change to those relevant for the document type being searched.
   b. For instance, when **Voucher** is selected, the **Workflow Statuses** specific to voucher approval are displayed.

5. At the bottom of the **Advanced Search** page, there are multiple selections for the various **Custom Fields** such as Fund, Project, and Procurement Dept. Use this feature to select one or more **Custom Fields** values helpful for your search.
6. Click the **Search** button to search.

Remembering My Last Document Search

▶ Document Search remembers what type of search you last ran - whether it was simple or advanced and what the document type you looked for.
▶ After running a search, the next time you navigate to Document Search, you will immediately be taken to the same page from which you last ran a search.
▶ Document Search does not remember the values or criteria you last searched for.

Basic Document Search Examples

▶ Below are two examples of different document searches you may be interested in running in Advanced Search.

View all Requisitions for a Procurement Dept Code and User from the past 30 days

1. In the **Search ⇨ All Documents** dropdown list, select **Requisition**. The search filters for an advanced requisition search display.
2. To search by a specific **Procurement Department**, scroll down to **Custom Fields**. In **Procurement Dept**, select **Is Exactly** from the dropdown menu (if not already specified), and then enter the **Procurement Dept** value. You can also specify a partial number or a range.
3. Click the **Search** button to search. The search results display.
4. To filter the search results by a date range, go to **Refine Search Results ⇨ Date Range**. From the dropdown, select the desired range such as **Days – Last 30 days** or a **Custom Date Range** to specify exact dates.
5. To filter by a user such as the Requester, click on the name of the user.
   a. To select multiple users, click the 🔽 filter icon. A pop-up displays all the criteria you can filter by. In this case, place a checkbox next to the users to filter by.
6. The search results show all requisitions in the last 30 days for the desired **Procurement Dept** and user.
7. To access a requisition from the search results, click the requisition number.

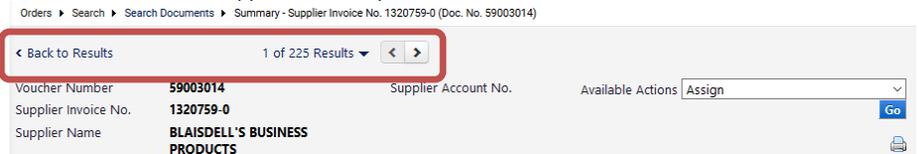### View Vouchers with unresolved Match Exceptions for my Procurement Dept Code

1. In the **Search ⇨ All Documents** dropdown list, select **Voucher**. The search filters for an advanced voucher search display.
2. To search by a specific **Procurement Department**, scroll down to **Custom Fields**. In **Procurement Dept**, specify **Is Exactly** from the dropdown menu (if not already specified), and then enter the **Procurement Dept** value. You can also select from your profile values, if any.
3. Click the **Search** button to search. The search results display.

4. Under **Refine Search Results**, browse to **Current Workflow Step**.
5. Under **Current Workflow Step** click **Match Exceptions**.
   a. The number in parentheses is the number of vouchers in the Match Exception workflow step.
   b. If *Match Exceptions* is not shown click the **[more]** link (if available) to expand the choices. If *Match Exceptions* is still not shown after clicking **[more]**, there are no Match Exceptions to be resolved.
6. To open the voucher you want, click the **Voucher No.** in the results.

Navigating between Documents from Search Results

▶ When viewing a document from the Document Search results, you can navigate to other documents within your search results without returning to the search results list.

1. From the Document Search results list, click on a document number.
2. Text and buttons appear at the top of the document.

Orders ▶ Search ▶ Search Documents ▶ Summary - Supplier Invoice No. 1320759-0 (Doc. No. 59003014)

| ‹ Back to Results | 1 of 225 Results ▼ | ‹ › |

Voucher Number	**59003014**	Supplier Account No.	Available Actions	Assign
Supplier Invoice No.	**1320759-0**			Go
Supplier Name	**BLAISDELL'S BUSINESS PRODUCTS**			

   a. A count of search results displays. Click the arrows next to the number of results to navigate to the previous ‹ or next › document from the search results list.
   b. To skip between documents from the search results list, click on the number of results or the down arrow ▼ to open a dropdown menu. Then click on a document number to view the document.
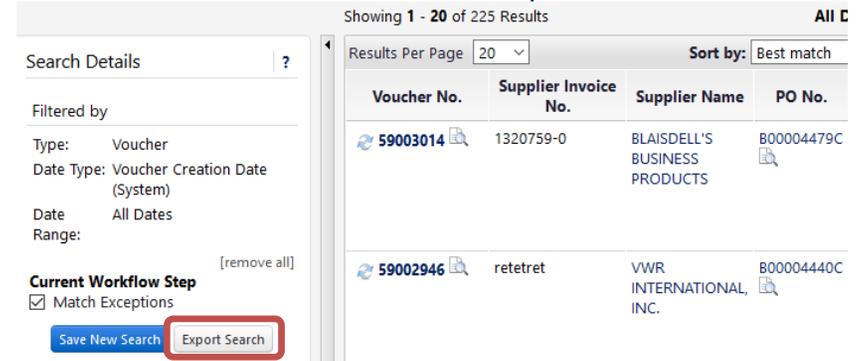
| 1 of 225 Results ▼ | ‹ › |
| 59003014 |
| 59002946 |
| 59002891 |
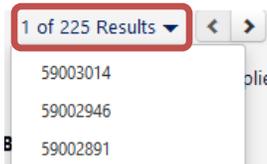
   c. To return to the full listing of your search results, click the **Back to Results** link at the far left side of the bar.
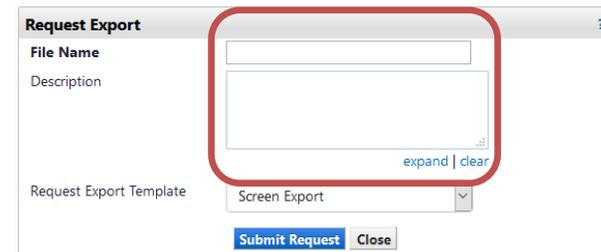
Export Results

▶ Search results are exported into CSV files.

1. From the results of a **Document Search**, click the **Export Search** button.

Showing **1 - 20** of 225 Results   All D

Search Details ?

Filtered by

Type: Voucher
Date Type: Voucher Creation Date (System)
Date Range: All Dates

[remove all]

Current Workflow Step
☑ Match Exceptions

Save New Search   Export Search

| Results Per Page | 20 ▼ | Sort by: Best match |

Voucher No.	Supplier Invoice No.	Supplier Name	PO No.
59003014	1320759-0	BLAISDELL'S BUSINESS PRODUCTS	B00004479C
59002946	retetret	VWR INTERNATIONAL, INC.	B00004440C

2. The **Document Search Export** window appears. Enter your **File Name** and optionally a **Description**.

Request Export ?

File Name   [   ]
Description [   ]
                      expand | clear

Request Export Template   Screen Export

Submit Request   Close

3. Select an available **Export Template**:
   a. **Screen Export** - contains only the information shown on the results screen.
   b. **Transaction Export** - contains one or more files with many detailed fields of the transaction such as the product, accounting code details, and form fields.
   c. **Full Export** - contains extensive information on orders. This should only be used by advanced users well versed in data manipulation to fully optimize this report. This option is only available for requisitions and Purchase Orders searches.

▶ For an **All Documents** search, only **Screen Export** is available as an export option.
▶ Exports will only be allowed for results of 50,000 or less. For searches that return more than 50,000 matches, the export option will not be available.

4. Click the **Submit** button.
5. The Request confirmation box appears.
   a. To view your export, click the **Go To Page: Download Export Files** button.
   b. To view your export later, click the **Close** button.

Request Submitted

The export request has been successfully submitted.

Pending and completed exports are available in:

Orders > Search > Download Export Files

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.
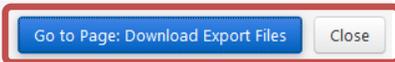
Go to Page: Download Export Files | Close

▸ An email notification can be generated when the requested export file is available for download. To receive this notification, enable the **Search Result Export Confirmation** email notification in your Profile's Notificaton Preferences.

▸ Please see the *Updating Your Profile* and Settings Quick Reference Guide for instructions on updating email preferences.

▸ The email will contain a link to the document search exports page where the file can be downloaded.

6. If you do not use the **Go To Page: Download Export Files** button to find your exports immediately, you can find them later using the BearBuy menus. From the side navigation bar, go to 🕐 **Orders > Search > Download Export Files** to find your completed export.

7. Once the file has been exported, the **File Name** column will update as a link with a **.zip** extension.

8. Click the name link and the file will download to your computer. Within the **.zip file** will be a CSV file(s) with the name of your file export.

Save a Search

▸ Searches may be saved for future use. Saving a search provides a way to specify the conditions or parameters of how you would like to search by and save that to your private Personal Search folder.

2. From the results of a **Document Search**, click the **Save New Search** button.
3. The **Add to Saved Searches** pop-up displays.
4. In **Step 1: Edit Saved Document Search Details**; provide a name that is meaningful to you in the **Document Search Nickname**.
   a. Optionally, click the **Add Description** link to specify a description of the saved search.

5. In **Step 2: Select Destination Folder**; select the folder to save the search.
   a. If you do not have any Personal folders or would like to create additional Personal folders for your Searches, click the **Add New** dropdown link.
   b. Depending on your preference, select either **Top level personal folder** or **Subfolder of selected folder**.


   c. The **Create New Personal Searches Folder** pop-up displays. Enter in a **Name** and optionally a **Description**, then click the **Save** button. A new folder or subfolder is created to store your saved search.
6. In the **Add to Saved Searches** window, click the **Save** button to confirm saving the search.
7. A confirmation of your saved search appears. Click the **Close** button.
8. To access a saved search, go to 🕐 **Orders > Search > View Saved Searches**.
   a. Select the folder that contains your desired saved search from the left panel, if not already selected.

b. Click the **Go** button to run the search and the results appear on the page.
c. Click the **Export** button to export the search to a .zip file.

9. Optionally, add a shortcut to the main document search page by clicking the **Add Shortcut** button.
   a. The shortcut will appear in the Saved Searches Shortcuts box below the main Document Search box.
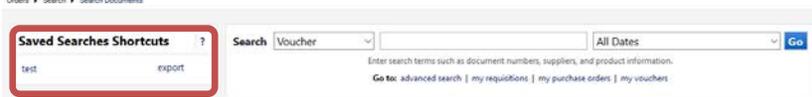
   b. To remove the shortcut, go back to **View Saved Searches** and click the **Remove Shortcut** button for the corresponding saved search.

Edit, Move/Copy, or Delete a Saved Search

10. To change the name or description for a saved search, go to **Orders > Search > View Saved Searches**.
    a. Find the saved search to edit. Click the corresponding **edit** link.
    b. The **Edit Searches** pop-up window displays. Edit the name and/or description of the saved search.
    c. Click the **Submit** button to save any changes made.
1. To Move or Copy a saved search to another saved search folder, go to **View Saved Searches**.
   a. Find the desired saved search. Click the corresponding **move/copy** link.
   b. Select the **Destination Folder** to copy or move the saved search to.
   c. Click the **move** or **copy** button depending on the action you want to take on the saved search.
   d. A confirmation of your move/copy appears. Click the **Close** button.
2. To delete a saved search, go to **View Saved Searches**.
   a. Find the saved search to delete. Click the corresponding **delete** link.
   b. Click the **OK** button to confirm the deletion of the saved search.

▶ The edit, move, copy, and delete actions above can be applied to multiple saved searches by using the corresponding checkboxes next to each saved search and the **edit | move/copy | delete** links at the top of the saved searches list.

Recurring Export

▶ Search exports can be scheduled to run automatically on a **weekly** or **monthly basis**.
▶ Only searches using the date criteria **Last Week** or **Last Month** can be set to recur.

1. From the results of a **Document Search** that used **Last Week** or **Last Month** as the date criteria, click the **Save Search** button.

▶ Weeks are defined as Sunday-Saturday.
▶ Months are defined as the 1st of the month to the last day of the month.

2. The **Add to Saved Searches** pop-up displays.
3. In **Step 1: Edit Saved Document Search Details**; provide a name that is meaningful to you in the **Document Search Nickname**.
   a. Optionally, click the **Add Description** link to specify a description of the saved search.
4. In **Step 2: Select Destination Folder**; select the folder where you would like to save the search.
5. In **Step 3: Would you like to create a recurring export?** Check the **Create Recurring Export** checkbox.
   a. Choose the **Export Type** from the dropdown list.
   b. The interval that the export will run (weekly or monthly) displays.
6. Click the **Save** button to confirm the changes in the **Add to Saved Searches** pop-up.
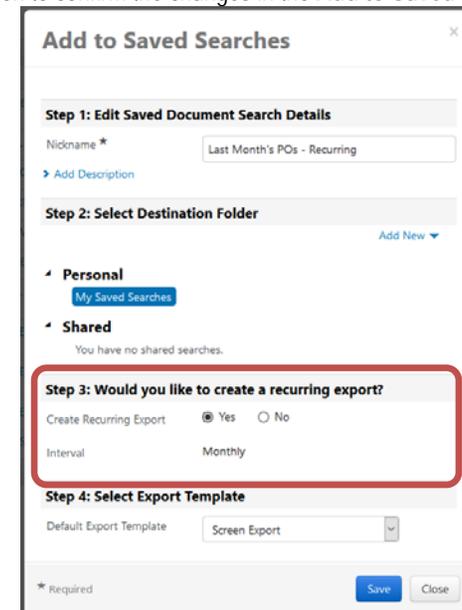
▶ Recurring extracts run after the time interval has passed.
▶ Weekly extracts are estimated to be available by Monday of the following week.
▶ Monthly extracts are estimated to be available by the 2nd of the following month.

- ▸ **NOTE**: These times may vary since these times are only **estimates**.
- ▸ An email notification can be generated when the requested export file is available for download. To receive this notification, enable the Search Result Export Confirmation email notification in your Profile's Email Preferences.
- ▸ Please see the *Updating Your Profile* and Settings Quick Reference Guide for instructions on updating email preferences.

7. To manage recurring exports go to View Saved Searches.

My Saved Searches

Folder Actions ▾ | ?

Actions for Selected Favorites ▾

☐
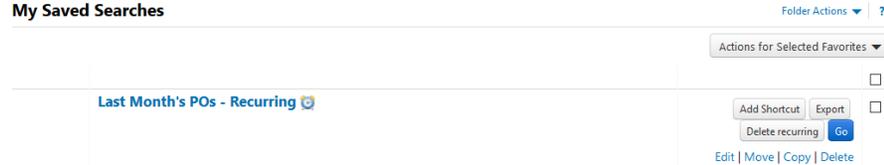
Last Month's POs - Recurring 🔄

Add Shortcut | Export | ☐
Delete recurring | Go

Edit | Move | Copy | Delete

   a. To remove a recurring export, click the **delete** link for each corresponding recurring export.

- ▸ Once scheduled, the export runs weekly/monthly until deleted OR one year from the create date.
- ▸ Up to **four** saved searches can be set to be recurring exports.