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I. Welcome Message

On Ohio University’s home page, click the Faculty/Staff button. Select the BobcatBUY link and enter your Ohio ID and Password.

**NOTE:** Upon initial login you will be asked to accept Terms and Conditions/BobcatBUY User Agreement. Read the entire agreement and click Accept.

Important announcements and training links are displayed in the Message window located on the left side of the page.

To logout of BobcatBUY, click the black Logout button (right side of screen, under the quick search link) or click on your Name (top right) and click Logout.
II. Searching Across All Documents

Document Search provides the ability to search across Requisitions, Purchase Orders, Invoices, Supplier Invoice Numbers, Receipts, and Supplier Profiles. When doing this, users will be presented with search results that span across the multiple document types with a variety of Filter and sorting options available. BobcatBUY can also be used as a reporting tool. Searching across all documents is the default search option unless otherwise specified.

III. Using The Quick Search Field

The Quick Search feature allows the user to perform a variety of searches, such as All Documents, Contracts, Documents, Invoice Numbers, Purchase Order Numbers, Receipt Numbers, Requisition Numbers, Supplier Invoice Numbers, Supplier Profiles and/or Help.

1. Use the Quick Search feature at the top, right-hand side of the screen.
2. Click on the magnifying glass. The Quick Search window is displayed.
   a. You may use the default document type All, or click the down-arrow and select the desired Document Type.
   b. Press the Tab key, enter the specific Document Number that you want.
   c. Click the magnifying glass at the end of that field, or push the Enter key on the keyboard. Your search result will be displayed.

NOTE: The Quick Search functions the same as if executed from the individual search screens. Results that start with the entered criteria are displayed in the search results.
3. Other Search Options to choose from in the Quick Search Field:

a. **Contract**: Use Contract to search for contracts based on their contract numbers. This is an exact filter, which means that it will return only contracts whose contract numbers match the search string exactly.

b. **Document**: Choose document (Requisition, Purchase Order, Invoice, Receipt number). This field will find any Document with the particular number you enter in the additional search field.

c. **Invoice Number**: Voucher Number (System assigns voucher number when Procure To Pay staff creates an Invoice against a Purchase Order) Enter the number of the invoice (voucher) to be viewed. A search by invoice number will return the invoice and any related purchase orders when All Documents is selected at the default. Only the invoice will be returned if the Invoice Document type is selected. Enter the beginning portion of the invoice number if the whole number is not known or to see all invoices starting with the entered value. Select the desired invoice to view/edit it.

d. **Purchase Order Number**: Enter the number of the PO to be viewed. Enter the beginning portion of the PO number if the whole number is not known or to see all PO’s starting with the entered value. If a single PO is found, it is shown. If more than one PO is found matching the entered criterion, then the search results are shown. Select the desired PO to view it.

e. **Receipt Number**: Enter the number of the receipt to be viewed. Enter the beginning portion of the receipt number if the whole number is not known or to see all receipts starting with the entered value. If a single receipt is found, it is shown. If more than one receipt is found matching the entered criterion, then the search results are shown. Select the desired receipt to view it.

f. **Requisition Number**: Enter the number of the Requisition to be viewed. Enter the beginning portion of the Requisition number if the whole number is not known or to see all Requisition’s starting with the entered value. If a single Requisition is found, it is shown. If more than one Requisition is found matching the entered criterion, then the search results are shown. Select the desired Requisition to view it.

g. **Supplier Invoice Number**: Enter the supplier provided number of the invoice to be viewed. If more than one invoice is found matching the entered criterion, then the search results are shown. Select the desired invoice to view/edit it.

h. **Supplier Profile**: Enter Supplier Names in order to find related documents.

i. **Help**: Enter search criteria to display Help function results.
IV. Simple Search Feature – Overview

Similar to the Simple Search feature used when shopping on the Home screen, Document search also has a Simple Search option. When using the Simple Search feature the following fields are searchable: All Documents, Requisition, Purchase Order, Invoice, and Receipt.

1. To perform a simple search click on Orders & Documents>Document Search>Search Documents.
2. In the Search field, click on the drop-down, scroll to and select the appropriate document. You may skip this step if you want to search All Documents, the default.

**WARNING:** The preferred option is to select the default; All Documents. This option returns results for all associated documents when one document search criteria is entered.

3. Tab to next field. In the blank Search field, enter the appropriate search criteria. You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “Office Max, VWR” only documents that include both of those suppliers will be returned.

4. Tab to the Date field, click in the drop-down arrow and scroll down and click on your date choice or leave the default; All Dates.

5. Click the Go button. Your search results are displayed.

6. Use the Filtered By section to filter specific attributes to fine tune your search.

7. To start a new search, click on the start new search button.

8. You may either start a new simple search right from this screen or click on the Advanced Search link.
V. Simple Search-Field Descriptions

Some examples of search criteria are:

1. **Document Number** – Enter any document number, leave All Documents as the default, especially if you don’t know under which document type a number is categorized.

2. **Requisition Number** - If the Requisition also has a related PO number, both the Requisition and the PO will be returned *(ONLY if All Documents is selected in the Document Type search field).* Invoices related to the PO do not have a data relationship with the Requisition and are not returned.

   **Purchase Order Number** - PO’s have a relationship to the Requisitions, receipts, and invoices. Any of these associated documents will be returned *(ONLY if All Documents is selected in the document type search field).*

3. **Participant** – You may enter search criteria for any user. The results will produce a particular document and any document that is in the audit trail for that particular document, that has been touched by that user. You may search by username, first name, last name, or their email address. In addition, you may search multiple participants at once by separating the values with a comma. If a document type was selected, for example a Requisition, the results will return all Requisitions associated with that participant. *(If All Documents is selected, the results returned will include any documents associated with that participant.)*

4. **Catalog Number (SKU)** – Search for documents containing a part number by entering the part number in the search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

5. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document.

   For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.
6. **Product Flags** – Enter product flag names in the field to search for documents that contain the particular product flag/s. You may select multiple product flags by separating the criteria with a comma.

![Image of a search interface with options for product flags and other search criteria.]

Results display all documents with a hazardous material flag contained in them. When you open the documents in the result set you should see the hazardous materials icon displayed.

![Image of a document with a hazardous material flag icon.]

7. **Form Name** (Direct Payment, Blanket Purchase Order, etc.) – search for documents that contain a specific form by entering the form name spelled correctly.

![Image of a search interface with options for form names.]

8. **Other Search Criteria**: Supplier Invoice Number, Voucher Number, Supplier Name, Requisition Name (which is Cart Name), Commodity Code, Manufacturer Name, Receipt Number, Receipt Packing Slip Number, and Receipt Tracking Number, Receipt Name.

9. In the **Date Range** drop-down menu, click on the drop-down arrow, scroll to and select the appropriate **Date Range** for the query. It defaults to **All Dates**. Options include;

10. All Dates- **Searches all documents without regard to date. Document search will default to All Dates if no other date range is selected.**

   a. Custom Date Range
   - Enter **Start Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Enter **End Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Click OK button
b. Number of days - Searches all documents in a selected range of calendar days
   - Days:
     - Last 7 Days (the current date plus the previous 6 days), Last 30, 60, 90, or 120 days
     - Recent Time Frame; Yesterday and Today
     - Last Week - The Sunday through Saturday of the previous week
     - This Week – The Sunday starting the current week through the current date

c. Calendar - Searches documents based on a calendar range
   - Month-to-Date - From beginning of calendar month to current date
   - Last Month - the last calendar month
   - Year-to-Date – From Jan 1st of current year to the current date
   - Previous Year – From Jan 1st through Dec 31st of the previous year

d. Fiscal - Search documents based on an organization’s fiscal year
   - Fiscal Year-To-Date – Starts from the fiscal year (July 1st) through the current date
   - Previous Fiscal Year – July 1st thru June 30th

e. Other – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days)
   - Click on your specific Custom Other Date choice.
   - Enter the Specific Date in the blank field using the visible template
   - Click OK.

11. Click Go button after all search criteria has been entered.
12. Your results will be displayed. The fields in the results set will vary based on the document type.

**WARNING:** The document search feature is limited to displaying 10,000 results in a set. The results will display the first 10,000 but will also display the total number of returned results count. In the example below, the search resulted in a result count of 15211.
VI. Simple Search-Post Filter Options

Post Filter Options after performing your initial document search: (refer to Post Filter Options section for more details). With Document Search, post-search filters are available that allow the user to refine the search or define additional criteria for the search results. For example, if you perform a search for POs, you can narrow your results by a specific department, owner, supplier, product flag, etc. The filter options, which display on the left side of the search results, function similar to those in Product Search. Post filtering allows the user to further narrow down their results.

1. **Sort By Feature**
   - You may sort by several options: Best Match, Create Date Newest First, Create Date Oldest First, Total High To Low, and Total Low To High.
   - Click in the Sort By field
   - Scroll down and select the appropriate option

2. **Start a New Search** from the Current Search Results displayed
   - Click on Start New Search button
   - Enter new search criteria

3. **Edit an existing search** from the current Search Results displayed
   - Click on Edit Search button
   - Edit existing search criteria entered

4. **Save or Export Your Search** – The Save Search and Export Search buttons are displayed in the Filtered By section (refer to the Save Search and Export Search sections for more details).

**IMPORTANT: For more detailed information on Relative Date Ranges, Filter Options, Saving Searches, and Exporting Searches refer to those sections in the Table of Contents.**
VII. Advanced Search-Overview

Similar to the simple search feature, advanced search allows the user to search across multiple documents, with the default option being All Document Types, search for a specific document type, or enter very specific, detailed search criteria. Each document type has its own set of changeable fields that can be altered while using the advanced search. Advanced search allows the user to pre-select the criteria rather than applying post-filters. Searching by Custom Fields is only available from the Advanced Search feature. Relative Date Range options and post filter options still apply for all advanced searches.

Multiple inputs are allowed for advanced searching. A user may enter multiple PO numbers, invoice numbers, etc. The document number fields (Document Number, Requisition Number, Purchase Order Number, Invoice Number, and Receipt Number, all allow for multiple inputs. You can key in multiple numbers in any of those fields and it will search for all of those values. When multiple numbers are keyed in, the system performs an “OR” search. For example if you keyed in PO145, PO146, and PO147, it would search for all of those PO’s and return them.

Searching For Documents From Multiple Suppliers-From Advanced Search, the supplier search field allows you to select multiple suppliers. You cannot search for multiple suppliers from the simple search.

Searching for documents from multiple system users-There are a number of user fields available through Advanced Search. These include participant, owner, prepared for, prepared by, approved by, invoiced by, invoiced owner, and received by. In each of these user search fields, you can enter multiple users. When multiple user names are entered, an “or” search is performed, meaning it will return results with any of the users listed. As you begin typing in a user’s information, it will prepopulate with values matching your entry.

WARNING: The document search feature is limited to displaying 10,000 results in a set. The results will display the first 10,000 but will also display the total number of returned results count. In the example below, the search resulted in a result count of 15211.
To execute an advanced search,

1. Click the **Orders & Documents** icon>**Document Search**>**Search Documents**.

2. Click the **Advanced Search** link under the blank search field.

**NOTE:** BobcatBUY remembers your last search choice and will automatically bring you back to the screen you last used.

From this screen the user has the option to pre-select various criteria pertaining to the desired document. The user may use the default search option: **All Documents**, or select **Requisition**, **Purchase Order**, **Invoice**, or **Receipt**.

3. Click on the drop-down arrow in the **Search** field, scroll down and select the appropriate Document Type or select the default, All Documents. BobcatBUY will automatically populate the document type from your most recent search in the drop-down view.

4. A search window is displayed.

5. Enter the relevant search criteria in any of the appropriate fields.

6. Click the **Go** button

The Advanced Search screen for each document type will provide additional search fields. In general, the criteria will vary based on the document type for which you are searching. Every document type includes the following search fields; Document Number, Document Information (Participants, document owner, date ranges, purchase dollar amount, supplier,
department and organization), and Item/Product Information (enter information related to the items such as catalog number, product description, and product flags).

VIII. Search Definitions For Advanced Search-All Documents

Search options and their descriptions for Advanced Search are listed below. They are listed under the Document Type under which they appear. Specific search criteria definitions for Requisition, Purchase Order, Invoice, and Receipt Document Types are listed in order under All Documents Search Criteria.
ALL DOCUMENTS SEARCH CRITERIA

After you enter your search criteria, click Go. Refer to the search criteria options below.

1. **Document Number** - Enter any document number if the All Documents option is defaulted in the Document Type search field. This is efficient especially if you don’t know under which document type a number is categorized.

2. **Participant** - Any user that has touched the document and is in the audit trail for the document. You may search by username, first name, last name, or their email address. You may search multiple participants at one time by separating the values with a comma. Click the magnifying glass icon beside the field to initiate a user search through a popup. When results are returned in the popup, click select beside each name that should be added to the search query.

   ![Participant Example](image)
   
   Results produced display all documents touched by both Joan Wigal and Joyce Childs in the specified Date Ranges and other criteria entered in the search fields;

3. **Owner** - The owner is usually the person for whom the document was created. Usually this is the person that originated and submitted the document, or “the prepared by” user.

4. **Date** - In the Date Range drop-down menu, click on the drop-down arrow, scroll to and select the appropriate Date Range for the query. It defaults to All Dates. Options include;

   a. **All Dates** - Searches all documents without regard to date. Document search will default to All Dates if no other date range is selected. This means the search will run across the entire site history from the time it was created up to the current date. This may result in...
very large result sets. Once the user starts applying post filters, all relevant results will be pulled from the entire date range searched, not just the first 10,000 results.

b. Custom Date Range
   - Enter Start Date manually (XX/XX/XXXX) or click on calendar to select a date
   - Enter End Date manually (XX/XX/XXXX) or click on calendar to select a date
   - Click OK button

c. Number of days - Searches all documents in a selected range of calendar days
   Days:
   - Last 7 Days (current date plus previous 6 days), Last 30, 60, 90, or 120 days
   - Recent Time Frame; Yesterday and Today
   - Last Week - The Sunday through Saturday of the previous week
   - This Week – The Sunday starting the current week through the current date

d. Calendar - Searches documents based on a calendar range:
   - Month-to-Date - From beginning of calendar month to current date
   - Last Month - the last calendar month
   - Year-to-Date – From Jan 1st of current year to the current date
   - Previous Year – From Jan 1st through Dec 31st of the previous year

e. Fiscal - Searches documents based on Fiscal Year:
   - Fiscal Year-To-Date - Starts from fiscal year (July 1st) through the current date
   - Previous Fiscal Year – July 1st thru June 30th

f. Other – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days).
   - Click on your specific Custom Other Date choice.
   - Enter the Specific Date in the blank field using the visible template
   - Click OK.

5. Total Amount – Use this search field for documents based on the total dollar amount.
   a. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between) then
   b. Enter a dollar amount.
6. **Supplier** – You may begin entering the supplier name. As you type, the field will auto populate the supplier names for the search criteria that you enter. You may choose to search on the criteria you enter to view documents with products from suppliers with all the criteria in their name, or select a supplier from the list to limit results specifically to that supplier.

Only those suppliers with hosted products are indicated with the hosted catalog icon. Other suppliers include non-catalog and punch-out suppliers.

When the "Supplier" field is used on an advanced search, the "Supplier" post filter is no longer available in search results.

If the supplier post filter is needed, use the simple search interface. Partial supplier name searches can be performed from the simple search interface. The "Supplier" post filter may show more supplier names than the user expected, but the multi-select post filter gives more flexibility to narrow the results. Once the results are refined through post filters, the user can save the search for future use without having to go through the post filter refinement process again.

You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “Office Max, VWR” only documents that include both of those suppliers will be returned.

Result set produced:
7. **Department** – Enter the Department Organization Number “XXXXX” or the Organization Name. As you enter the search criteria, the field will auto populate with choices that match what you enter. You may click on the magnifying glass to use the search feature in this field.

For instance if you enter “210” in the Department field or in the search field, the system will auto populate with choices that include the numbers “210”

![Image of Department auto populate](image)

8. **Catalog Number (SKU)** - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

**Special characters** in the catalog number are **not supported** for searching and should be omitted. For Example: the Greek letter mu is a special character, but cannot be used in the catalog number search in order to find a match. For a catalog number like: SPV-120 25µg, omit the 25µg portion and search on the first part of the catalog number.

9. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document. For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.

![Image of Product Description](image)
10. **Product Flags** – Enter a checkmark in the checkbox to the left of the appropriate product flag to search for documents that contain the particular product flag. You may select multiple product flags. Results produced will display all documents with any of the three product flags contained in them.

11. **Click Go button after all search criteria has been entered.**
IX. Search Definitions For Advanced Search-Requisition

To perform an advanced Requisition search, select Requisitions from the drop-down list. From here enter the information in the desired fields.
REQUISITION SEARCH CRITERIA (fields listed are only relevant to this search criteria)

1. **Requisition Number** – enter the Requisition number. To enter multiple Requisition numbers, separate each number with a comma.
2. **Requisition Name** – Enter the Cart Name of the Shopping Cart before it was turned into a Requisition. The cart name is the Requisition name.
3. **Participant** - This means any user that has touched the particular document and is in the audit trail for that particular document. You may search by username, first name, last name, or their email address. You may search multiple participants at one time by separating the values with a comma.

Results produced display all documents touched by both Joan Wigal and Joyce Childs in the specified Date Ranges and other criteria entered in the search fields;

5. **Prepared For** – The cart/Requisition has a field called "prepared for" on it and the prepared for user in document search looks for the user assigned in that same field on the cart.
   a. Start typing the name of the user who prepared the cart/requisition. A drop down list of matching names will appear.
   b. Type username, first name, last name or email address to see relevant user suggestions in the dropdown. Select a name from the list.
   c. To remove a user name, click the "x" beside the name or backspace through the name. Inactive users are displayed in italics in the dropdown list.
   d. If the user name is not appearing in the type ahead drop down, try using the **User Search** pop-up by clicking the magnifying glass next to the prepared for input field. The magnifying glass will provide a user search popup window with more options like searching for users by department. Click the **Search** button.

   **NOTE:** If the magnifying glass is not bringing up a popup, make sure the browser is allowing popups from the site.

6. **Prepared By** – since OU uses the Assign Cart functionality, the cart assignee (Requester) becomes the prepared by user when the cart is submitted to workflow. The prepared by field also exists on the PO advanced search page so that users can search for POs that originated from a Requisition prepared by the user designated on the Requisition as the prepared by user.
a. The prepared by user field is a type ahead multi value field. Start typing the name of a user who prepared the cart/Requisition for another user and a drop down list of matching names will appear.

b. Type username, first name, last name or email address to see relevant user suggestions in the drop down list. Select a name from the list. Start typing another name to add another prepared by user to the search parameters.

c. To remove a user name, click the "x" beside the name or backspace through the name. Inactive users are displayed in italics in the drop down list.

d. If the user name is not appearing in the type ahead drop down, try using the User Search pop-up by clicking the magnifying glass next to the prepared by input field. The magnifying glass will provide a user search with more options like searching for users by department.

NOTE: (1) If the drop down list does not display the name you enter, check the browser version and make sure it is a current SciQuest certified or supported browser version. (2) If the magnifying glass is not bringing up a popup, make sure the browser is allowing popups from the site.

8. Date - Requisition Date Types
The date type options allow the user to differentiate between Submit date, Complete date, Create date, Last History Date, and Purchase Order Create Date.

<table>
<thead>
<tr>
<th>Date Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit Date</td>
</tr>
<tr>
<td>Complete Date</td>
</tr>
<tr>
<td>Create Date</td>
</tr>
<tr>
<td>Last History Date</td>
</tr>
<tr>
<td>Purchase Order Create Date</td>
</tr>
</tbody>
</table>

a. Submit Date: when the draft was submitted to workflow

b. Complete Date: when the Requisition workflow is marked as complete or for a cart return Requisition, this is when the cart return is complete (punchout complete).

c. Create Date: when the draft cart was created, which could be a different day than when the cart is submitted to workflow

d. Last History Date: the date the document was last modified. This should correspond to the last history seen on the history tab of the document.

e. Purchase Order Create Date: when the related PO(s) is created for the Requisition either through workflow or PO import.

9. Date - In the Date Range drop-down menu, click on the drop-down arrow, scroll to and select the appropriate Date Range for the query. It defaults to All Dates. Options include;

a. All Dates: Searches all documents without regard to date. Document search will default to All Dates if no other date range is selected. This means the search will run across the
entire site history from the time it was created up to the current date. This may result in very large result sets. Once the user starts applying post filters, all relevant results will be pulled from the entire date range searched, not just the first 10,000 results.

b. Custom Date Range
   - Enter **Start Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Enter **End Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Click OK button

c. Number of days- Searches all documents in a selected range of calendar days
   Days:
   - Last 7 Days-current date plus the previous 6 days), Last 30, 60, 90, or 120 days
   - Recent Time Frame; Yesterday and Today
   - Last Week - The Sunday through Saturday of the previous week
   - This Week – The Sunday starting the current week through the current date

d. Calendar-Signs documents based on a calendar range
   - Month-to-Date-From beginning of calendar month to current date
   - Last Month-the last calendar month
   - Year-to-Date – From Jan 1st of current year to the current date
   - Previous Year – From Jan 1st through Dec 31st of the previous year

e. Fiscal-Signs documents based on an organization’s fiscal year
   - Fiscal Year-To-Date – Starts from the fiscal year (July 1st) through the current date
   - Previous Fiscal Year – July 1st thru June 30th

f. Other – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days).
   - Click on your specific Custom **Other** Date choice.
   - Enter the **Specific Date** in the blank field using the visible template
   - Click OK.

10. **Total Amount** – Use this search field for documents based on the total dollar amount.
   a. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between) then
   b. Enter a dollar amount.
11. **Supplier** – You may begin entering the supplier name. As you type, the field will auto populate the supplier names that you enter. You may choose to search on the criteria you enter to view documents with products from suppliers with all the criteria in their name, or select a supplier from the list to limit results specifically to that supplier. Only those suppliers with hosted products are indicated with the hosted catalog icon. Other suppliers include non-catalog and punch-out suppliers.

When the "Supplier" field is used on an advanced search, the "By Supplier" post filter is no longer available in search results.

If the supplier post filter is needed, use the simple search interface. Partial supplier name searches can be performed from the simple search interface. The "By Supplier" post filter may show more supplier names than the user expected, but the multi-select post filter gives more flexibility to narrow the results. Once the results are refined through post filters, the user can save the search for future use without having to go through the post filter refinement process again.

You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “CDWG, VWR” only documents that include both of those suppliers will be returned.

![Supplier search interface](image)

12. **Department** – Enter the Department Organization Number “XXXXX” or the Organization Name. As you enter the search criteria, the field will auto populate with choices that match what you enter. You may click on the magnifying glass to use the search feature in this field.

For instance if you enter “210” in the Department field or in the search field, the system will auto populate with choices that include the numbers “210”
13. **Catalog Number (SKU)** - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

Special characters in the catalog number are not supported for searching and should be omitted. For Example: the Greek letter mu is a special character, but cannot be used in the catalog number search in order to find a match. For a catalog number like: SPV-120 25µg, omit the 25µg portion and search on the first part of the catalog number.

14. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document.

For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.

Results produced:

15. **Commodity Code** - Enter Commodity Code or search for it by clicking on magnifying glass. To enter multiple codes, separate with commas. Selecting the ‘X’ to the right of the commodity code will remove it from the list.

16. **Form Name** – (Direct Payment, Blanket Purchase Order, etc.) Not available in All Documents or Receipts Search. **Form Name** is an exact match; it must be typed in as it is in the system.
Search for documents that contain a specific form by entering at least one word from the form name spelled correctly. The entire form name does not have to be entered, just one word and the word should be spelled correctly in order to find matching results. Including the full form name spelled correctly will yield the best results.

17. Form Type - Enter the Form Type Name or click on the magnifying glass, then click on the checkbox next to the appropriate choice. You may also search by multiple form types. Click the Add button.

18. Product Flags – Enter a checkmark in the checkbox to the left of the appropriate product flag to search for documents that contain the particular product flag. You may select multiple product flags. Results produced will display all documents with any of the three product flags contained in them.

19. Contract Number – If you know the specific Contract Number you may enter it.

20. Purchase Order Number - To search for Requisition(s) related to a purchase order(s), enter each purchase order number separated by a comma.

21. Workflow:
   Workflow Step- This search finds documents currently in the step selected. Workflow steps are different for a Requisition workflow, a Purchase Order workflow, and an Invoice workflow. Therefore, this search must be performed for a single document type.
   a. Click on the magnifying glass
   b. Click on the checkboxes for the appropriate workflows you want to search. If you wish to see pending documents for multiple workflow steps you can choose as many workflow steps as you wish in order to review.
   c. Click the Add button.
d. You may also begin typing the desired workflow step into the search bar located under the **Current Workflow Step** heading. Select the appropriate step listed in the drop-down menu. To add another, simply type the next workflow step into the field.

e. Your selected workflow step will now appear in the search bar.

f. To remove previously selected steps, click the **X** button located to the right of the desired step.

g. **Advanced Dynamic Workflow** steps will also be included in the workflow step post-results filter located on the left hand-side of the window. If you wish to review documents that are pending for a specific advanced dynamic workflow step, you can search for your documents and then filter by that specific filter option or ADW step.

22. **Workflow Status** – **A Requisition Folder** generally contains Requisitions in the midst of the approval process. Workflow statuses indicate the current state of the pending Requisition. Click on the appropriate Workflow Status checkbox, see definitions below.

a. **Completed** - This status indicates that workflow or approval routing is complete for this Requisition. No further approval action is required.

b. **Withdrawn** - Select this status to view Requisitions that have been completely withdrawn.

c. **Pending** - This status indicates that the Requisition is currently awaiting action in the approval process. A **pending** Requisition requires further action before moving to the next step in the approval process.
d. **Rejected** - This status indicates that the entire pending Requisition has been rejected (or not approved) based on reasons stored on the Requisition history tab. Once a Requisition is in **Rejected** status, it cannot return to an active status.

23. **Status Flags** – You may search for documents with one or both of the status flags. Click in the appropriate checkbox for one or both of the choices;

   a. **With Rejected Lines status flag**– This status is for Requisitions where one or more lines have been rejected in the Requisition workflow (but not all lines). The rest of the lines were most likely approved. The flag is intended to be used in conjunction with the workflow status designations. It will allow users to identify which documents are pending with rejected lines or documents that are completed with rejected lines.

   b. **With Withdrawn Lines status flag**-This status is for Requisitions where one or more lines have been withdrawn in the Requisition workflow (but not all lines). The flag is intended to be used in conjunction with the workflow status designations. It will allow users to identify which documents are pending with withdrawn lines or documents that are completed with withdrawn lines.

   c. **With Errors**- The "with errors" status flag is intended to help administrators identify documents that are in error state.

   d. **With Attachments**- The "With Attachments" filter will limit the search results to documents that have any of the following kinds of attachments:

      - **Header**: internal/external: URL or file
      - **Line**: internal/external: URL or file
      - **Form**: internal/external: URL or file
      - **Comment**: URL or file

24. **Custom Fields** – Custom fields allows the user to define more search criteria for their particular search.
a. **HR_Person_ID**
   - click in the drop-down box and choose one of the following;
     - Is Exactly
     - Starts With
     - Is Between

   - You may enter the value in the blank field, or
   - You may click on the Select from profile values link and select an option.
   - To add another person, click on the Add another HR_Person_ID link.

b. **Natural Account**
   - click in the drop-down box and choose one of the following;
     - Is Exactly
     - Starts With
     - Is Between

   - You may either enter the Natural Account Value in the blank field or Click on the Select from all values link and search for the appropriate natural account value.

   - You may also click on the Add another Natural Account link to add another natural account. Start the steps over again to select another.

c. **Prevailing Wage** - click on the drop-down arrow and choose the Yes/True value or No/False value.

d. **Project/Task**
   - click in the drop-down box and choose one of the following;
     - Is Exactly
     - Starts With
     - Is Between

   - You may either enter the Project/Task Value in the blank field, click on the Select from profile values link or click on the Select from all values link and search for the appropriate natural account value.

   - You may also click on the Add another Project/Task link to add another Project/Task. Start the steps over again to select another.

25. **Click the Go button after all criteria has been selected for the search.**
X. Search Definitions for Advanced Search-Purchase Orders

To perform an advanced Purchase Order search, select Purchase Order from the drop-down list. From here enter the information in the desired fields.
PURCHASE ORDER SEARCH CRITERIA (fields listed are only relevant to this search criteria)

1. **Purchase Order Number** - To search for Requisition(s) related to a purchase order(s), enter each purchase order number separated by a comma. This would return the Requisitions for each of the purchase order numbers listed in addition to the purchase orders.

2. **Participant** - This means any user that has touched the particular document and is in the audit trail for the document. You may search by username, first name, last name, or their email address. You may search multiple participants at one time by separating the values with a comma. The magnifying glass will provide a user search feature with more options like searching for users by department or other options.

   Results produced display all documents touched by both Joan Wigal and Joyce Childs in the specified Date Ranges and other criteria entered in the search fields.

3. **Owner** - The PO owner is usually the person for whom the document was created. Usually this is the person that originated and submitted the document, or “the prepared by” user.

4. **Prepared By** – since OU uses the Assign Cart functionality, the cart assignee (Requester) becomes the prepared by user when the cart is submitted to workflow. The **prepared by** field exists on the PO advanced search page so that users can search for POs that originated from a Requisition prepared by the user designated on the Requisition as the prepared by user.
   a. The **prepared by** user field is a multi value field. Start typing the name of a user who prepared the cart/Requisition for another user and a drop down list of matching names will appear.
   b. Type username, first name, last name or email address to see relevant user suggestions in the drop down list. Select a name from the list. Start typing another name to add another prepared by user to the search parameters.
   c. To remove a user name, click the "x" beside the name or backspace through the name. Inactive users are displayed in italics in the drop down list.
   d. If the user name is not appearing in the type ahead drop down, try using the User Search pop-up by clicking the magnifying glass next to the **prepared by** input field. The magnifying glass will provide a user search with more options like searching for users by department.
   e. When multiple prepared by users are entered, an "OR" search is performed for documents with the users.

**NOTE:** (1) If the drop down list does not display the name you enter, check the browser version and make sure it is a current SciQuest certified or supported browser version.
(2) If the magnifying glass is not bringing up a popup, make sure the browser is allowing popups from the site.

5. **Date – Purchase Order Dates Types** - The date type options allow the user to differentiate between Creation Date, Original Revision Date, Last Revision Date, Last Distribution Date, Workflow Completion Date, and PO Closed Date.
   a. Creation Date – when the PO was created either from workflow or through PO import.
   b. Last Distribution Date – when the PO was last sent to the supplier.
   c. Last History Date - the date the document was last modified. This should correspond to the last entry seen on the history tab of the document.
   d. Last Revision Date – When the PO last had a finalized revision saved. A finalized revision can come from an automated process like matching or from someone using the finalize revision action on a document.
   e. Original Revision Date - When the PO first went through the revise PO step of workflow. Not all purchase orders need to be revised.
   f. PO Accounting Date - the date that the requisition was submitted by the requester; the actual time that the shopping cart became a live requisition.
   g. PO Closed Date – When the PO was closed.
   h. PO Soft Closed Date - When a PO is in Soft Close status, no edits can be made to this PO and no receipts or invoices can be entered. To take these actions, open the PO.
   i. Workflow Completion Date – when the last workflow step successfully completed and workflow is marked as complete. Workflow complete date can be observed on the PO history tab (the audit trail).

![Chart of Date Types](image)

6. **Date** - In the **Date Range** drop-down menu, click on the drop-down arrow, scroll to and select the appropriate **Date Range** for the query. It defaults to **All Dates**. Options include;
   a. All Dates- Searches all documents without regard to date. Document search will default to **All Dates** if no other date range is selected. This means the search will run across the entire site history from the time it was created up to the current date. This may result in
very large result sets. Once the user starts applying post filters, all relevant results will be pulled from the entire date range searched, not just the first 10,000 results.

b. Custom Date Range
   - Enter **Start Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Enter **End Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Click OK button

c. Number of days-Searches all documents in a selected range of calendar days
   - Days:
     - Last 7 Days-current date plus the previous 6 days), Last 30, 60, 90, or 120 days
     - Recent Time Frame; Yesterday and Today
     - Last Week - The Sunday through Saturday of the previous week
     - This Week – The Sunday starting the current week through the current date

d. Calendar-Searches documents based on a calendar range
   - Month-to-Date-From beginning of calendar month to current date
   - Last Month-the last calendar month
   - Year-to-Date – From Jan 1st of current year to the current date
   - Previous Year – From Jan 1st through Dec 31st of the previous year

e. Fiscal- Search documents based on an organization’s fiscal year
   - Fiscal Year-To-Date – Starts from the fiscal year (July 1st) through the current date
   - Previous Fiscal Year – July 1st thru June 30th

f. Other – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days).
   - Click on your specific Custom **Other Date** choice.
   - Enter the **Specific Date** in the blank field using the visible template
   - Click OK.

7. **Total Amount** – Use this search field for documents based on the total dollar amount.
   - a. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between) then
   - b. Enter a dollar amount.
8. **Supplier** – You may begin **entering the supplier name**. As you type, the field will auto populate the supplier names that you enter. You may choose to search on the criteria you enter to view documents with products from suppliers with all the criteria in their name, or select a supplier from the list to limit results specifically to that supplier. Only those suppliers with hosted products are indicated with the hosted catalog icon. Other suppliers include non-catalog and punch-out suppliers.

When the "Supplier" field is used on an advanced search, the "By Supplier" post filter is no longer available in search results.

If the supplier post filter is needed, use the simple search interface. Partial supplier name searches can be performed from the simple search interface. The "By Supplier" post filter may show more supplier names than the user expected, but the multi-select post filter gives more flexibility to narrow the results. Once the results are refined through post filters, the user can save the search for future use without having to go through the post filter refinement process again.

You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “CDWG, VWR” only documents that include both of those suppliers will be returned.

9. **Department** – Enter the Department Organization Number “XXXXX” or the Organization Name. As you enter the search criteria, the field will auto populate with choices that match what you enter. You may click on the magnifying glass to use the search feature in this field.
For instance if you enter “210” in the Department field or in the search field, the system will auto populate with choices that include the numbers “210”

10. **Catalog Number (SKU)** - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

   **Special characters** in the catalog number are not supported for searching and should be omitted. For Example: the Greek letter mu is a special character, but cannot be used in the catalog number search in order to find a match. For a catalog number like: SPV-120 25µg, omit the 25µg portion and search on the first part of the catalog number.

11. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document.

   For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.

12. **Commodity Code** - Enter Commodity Code or search for it by clicking on magnifying glass. To enter multiple codes, separate with commas. Selecting the ‘X’ to the right of the commodity code will remove it from the list.
13. **Form Name** – (Direct Payment, Blanket Purchase Order, etc.) Not available in All Documents or Receipts Search. **Form Name** is an exact match; it must be typed in as it is in the system. Search for documents that contain a specific form by entering at least one word from the form name spelled correctly. The entire form name does not have to be entered, just one word and the word should be spelled correctly in order to find matching results. Including the full form name spelled correctly will yield the best results.

14. **Form Type** – Enter the **Form Type** Name or click on the magnifying glass, then click on the checkbox next to the appropriate choice. You may also search by multiple form types. Click the Add button.

15. **Product Flags** – Enter a checkmark in the checkbox to the left of the appropriate product flag to search for documents that contain the particular product flag. You may select multiple product flags. Results produced will display all documents with any of the three product flags contained in them.

16. **Contract Number** – If you know the specific Contract Number you may enter it.

17. **Requisition Number** – enter the Requisition number. To enter multiple Requisition numbers, separate each number with a comma.

18. **Requisition Name** – Enter the Cart Name of the Shopping Cart before it was turned into a Requisition. The cart name is the Requisition name.

19. **Receipt Number** - In advanced search, multiple receipt numbers may be searched for by separating each number with a comma. The results will show documents related to those receipts. Receipt number is also searchable in simple search, but only one receipt number at a time can be combined with other search terms.
20. Receipt Name – Enter the name assigned to the receipt when it was created.

21. Packing Slip Number - In advanced search, multiple packing slip numbers may be searched for by separating each number with a comma. The results will show documents related to those receipts. Packing slip number is also searchable in simple search, but only one packing slip number at a time can be combined with other search terms. Simple search does not support the comma separated multiple values.

22. Tracking Number - In advanced search, multiple tracking numbers may be searched for by separating each number with a comma. The results will show documents related to those receipts. The comma separator makes the search for the multiple values an "or" search instead of an "and" search. Tracking number is also searchable in simple search, but only one tracking number at a time can be combined with other search terms.

23. Invoice Number - In advanced search, multiple invoice numbers may be searched for by separating each number with a comma. The results will show documents related to those invoices entered. The comma separator makes the search for the multiple values an "or" search instead of an "and" search. Invoice number is also searchable in simple search, but only one invoice number at a time can be combined with other searches.

24. Invoice Name – Enter the name assigned to the invoice when it was created.

25. Supplier Invoice Number - In advanced search, supplier invoice numbers may be searched for by separating each number with a comma. The results will show documents related to those invoices entered. Supplier invoice number is also searchable in simple search, but only one invoice number at a time can be combined with other search terms.

26. Workflow - Workflow Step - This search finds documents currently in the step selected. Workflow steps are different for a Requisition workflow, a purchase order workflow, and an invoice workflow. Therefore, this search must be performed for a single document type.
   a. Click on the magnifying glass
   b. Click on the checkboxes for the appropriate workflows you want to search
   c. You may click on as many as you need.
   d. Click the Add button.
   e. You may also begin typing the desired workflow step into the search bar located under the Current Workflow Step heading. Select the appropriate step listed in the drop-down menu.
f. **Advanced Dynamic Workflow** steps will also be included in the workflow step post-results filter located on the left hand-side of the window. If you wish to review documents that are pending for a specific advanced dynamic workflow step, you can search for your documents and then filter by that specific filter option or ADW step.

g. The selected step(s) will now appear in your search bar.

27. **Workflow Status – A Purchase Order Folder** generally contains Purchase Orders in the midst of the approval process. Workflow statuses indicate the current state of the pending Purchase Order. Click on the appropriate **Workflow Status** checkbox, see definitions below.
   a. **Pending** - This status indicates that the Purchase Order is currently awaiting action in the approval process. A pending Purchase Order requires further action before moving to the next step in the approval process.
   b. **Rejected** - This status is used for Requisition and Invoice Workflow status.
   c. **Completed** - when the last step of workflow successfully completed and workflow is marked as complete. Workflow complete date can be observed on the PO history tab (the audit trail).

28. **Supplier Status** Click on the appropriate **Supplier Status** checkbox, see definitions below.
   a. **Sent to Supplier** – The PO or line has been sent to the supplier for processing.
   b. **Cancelled** – The PO or line has been cancelled. Refer to History tab for details regarding the cancellation. A supplier cancellation will be noted in the audit trail as the System user.
   c. **Partially Shipped**- Only some of the line items on the PO have been shipped.
   d. **Over Shipped** – More line items than were on the original PO have been shipped.
   e. **Sent/Confirmed** – The PO or line has been received by the supplier.
f. **No Shipments** - The supplier has sent no shipments.

g. **Fully Shipped** – The PO with all lines, has been shipped by the supplier.

29. **Receipt Status** - Click on the appropriate Receipt Status checkbox, see definitions below.
   a. **No Receipts** – PO’s with no receipts have a status of **No Receipts**.
   b. **Partially Received** – Only some of the line items have been receipted.
   c. **Fully Received** – A PO is Fully Received if either the quantity or cost have been received for every line item in the amounts equal to the amounts ordered on the PO.
   d. **Over Received** – A PO is Over Received if either the quantity or cost received for any line item is greater than the amount ordered on the PO.

30. **Invoice Status** - Click on the appropriate Invoice Status checkbox, see definitions below.
   a. **No Invoices** – PO’s with no invoices entered against them have a status of No Invoices.
   b. **Partially Invoiced** – A PO is Partially Invoiced if at least one invoice has been created and all lines have not been fully invoiced.
   c. **Fully Invoiced** – A PO is Fully Invoiced if both the quantity and cost have been invoiced for every line item in the amounts equal to the amounts ordered on the PO.
   d. **Over Invoiced** – A PO is Over Invoiced if either the quantity or price invoiced for any line item is greater than the amount ordered on the PO.

31. **Matching Status** - Click on the appropriate Matching Status checkbox, see definitions below.
   a. **Partially Matched** – To find documents (PO, receipt, or invoice) with one or more, but not all lines matched, add this status to the filters. Partial matches can occur only with a forced match on one or more line items.
   b. **No Matches** – To find documents (PO, receipts, or invoices) with no lines matched, add this status to the list of filters.
   c. **Fully Matched** - To find documents (PO, receipt, or invoice) with all lines matched, add this status to the filters.

32. **AP Status** – Click on the appropriate AP Status checkbox, see definitions below.
   a. **Open**- status defines the purchase order as available for modification (assuming the user has the proper permissions), receipts and invoices may be created and matched.
   b. **Soft Closed-Waiting for Invoice Pay Status** - When PO is in Soft Close status no edits can be made to this PO and no receipts or invoices can be entered. To take these actions, open the PO.
   c. **Closed**- The Closed status defines the purchase order as no longer editable and receipts and invoices may not be created. Additionally, a Closed PO may not be matched. In order to perform any of the listed actions against the PO, it must be re-opened.
d. **Soft Closed** - When PO is in Soft Close status no edits can be made to this PO and no receipts or invoices can be entered. To take these actions, open the PO.

33. **Status Flags** – You may search for documents with one or many status flags. Click in the appropriate checkbox for one or both choices: **With User Revisions, With Rejected Lines, With Cancellation, With Supplier Modification, Requires Receipts, With Substituted Invoice Items, With Returns, With System Revisions, With Errors, With Backorders, With Attachments, With Credits, With Forced Matches, and With Cancelled Receipt Items.**

34. **Custom Fields** – Custom fields allows the user to define more search criteria for their particular search.

<table>
<thead>
<tr>
<th>Custom Fields</th>
<th>Filter Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR_Person_ID</td>
<td>None</td>
<td>Add another HR_Person_ID</td>
</tr>
<tr>
<td>Natural Account</td>
<td>None</td>
<td>Add another Natural Account</td>
</tr>
<tr>
<td>Prevailing Wage</td>
<td>None</td>
<td>Add another Prevailing Wage</td>
</tr>
<tr>
<td>PROJECT_TASK</td>
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<td>Add another PROJECT_TASK</td>
</tr>
<tr>
<td>FUNDTYPE_FUND_ORG</td>
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<tr>
<td>FUND</td>
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<td>Add another FUND</td>
</tr>
<tr>
<td>FUND_TYPE</td>
<td>None</td>
<td>Add another FUND_TYPE</td>
</tr>
<tr>
<td>ORG</td>
<td>None</td>
<td>Add another ORG</td>
</tr>
</tbody>
</table>
a. **HR_Person_ID**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   
   ii. You may enter the value in the blank field.
   iii. You may also click on the **Add another HR_Person_ID** link to add another person.

b. **Natural Account**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   
   ii. You may either enter the Natural Account Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.
   iii. You may also click on the **Add another Natural Account** link to add another natural account. Start the steps over again to select another.

c. **Prevailing Wage** - click the drop-down arrow and choose the **Yes/True** value.

d. **Project/Task**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   
   ii. You may either enter the Project/Task Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.
   iii. You may also click on the **Add another Project/Task** link to add another Project/Task. Start the steps over again to select another.

e. **Fund Type – Fund – Org**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   
   ii. You may either enter the Fund Type – Fund -Org Value in the blank field or Click on the **Select from all profile values** link or the **Select from all values** link, then search for the appropriate Fund Type – Fund – Org value.
   iii. You may also click on the **Add another Fund Type – Fund – Org** link to add another Fund Type – Fund – Org. Start the steps over again to select another.
f. **Fund**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   ii. You may either enter the Fund Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.
   iii. You may also click on the **Add another Fund** link to add another Fund. Start the steps over again to select another.

  g. **Fund Type**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   ii. You may either enter the Fund Type Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.
   iii. You may also click on the **Add another Fund Type** link to add another Fund Type. Start the steps over again to select another.

  h. **Organization**
   i. click in the drop-down box and choose one of the following;
      1. Is Exactly
      2. Starts With
      3. Is Between
   ii. You may either enter the Organization Value in the blank field or Click on the **Select from all values** link and search for the appropriate Organization value.
   iii. You may also click on the **Add another Organization** link to add another Organization. Start the steps over again to select another.

35. Click the **Go** button after all criteria for your search has been selected.
XI. Search Definitions for Advanced Search-Invoice

To perform an advanced Invoice search, select Invoice from the drop-down list. From here enter the information in the desired fields.
INVOICE SEARCH CRITERIA (fields listed are only relevant to this search criteria)

1. **Invoice Number(s)** - In advanced search, multiple invoice numbers may be searched for by separating each number with a comma. The results will show documents related to those invoices entered. The comma separator makes the search for the multiple values an "or" search instead of an "and" search.

2. **Invoice Name** – Enter the name assigned to the invoice when it was created.

3. **Supplier Invoice Number(s)** - In advanced search, supplier invoice numbers may be searched for by separating each number with a comma. The results will show documents related to those invoices entered. The comma separator makes the search for the multiple values an "or" search instead of an "and" search.

4. **Participant** - This means any user that has touched the document and is in the audit trail for the document. You may search by username, first name, last name, or their email address. You may search multiple participants at one time by separating the values with a comma.

Results produced display all documents touched by both Joan Wigal and Joyce Childs in the specified Date Ranges and other criteria entered in the search fields.

Click the magnifying glass icon beside the field to initiate a user search through a popup. When results are returned in the popup, click select beside each name that should be added to the search query.

5. **Invoiced By** – The user that creates the Invoice. The Invoiced by user may be different from the Invoice Owner. This will usually be a Procure-To-Pay staff member. The staff members name actually appears on the invoice in the General section, in the field labeled *AP Invoice Entry*.

6. **Invoice Owner** - The owner for an invoice or credit memo is defined differently based on the source and type of invoice/credit memo.
   a. For **PO invoices**, the invoice owner is the same as the PO owner regardless of the invoice source.
   b. **Manually entered Non-PO** invoices will have the same invoiced by user and invoice owner user.
c. **Electronic Non-PO** invoices will *not have an invoice owner or an invoiced by user* associated with them and cannot be searched for by user.

7. **Approved By** - An approved by user is anyone who acted on the document while having it assigned to them as an approver or while acting in an approval capacity. Approve and reject actions are both approval actions. A document may have many approved by users depending on the workflow steps it went through before completing workflow. Inactive users are displayed in italics in the drop down list.

If the user name is not appearing in the type ahead drop down, try using the user search popup by clicking the magnifying glass next to the approved by input field. The magnifying glass will provide a user search with more options like searching for users by department.

**NOTE:** Service Invoices must be approved by the requisitioner in addition to invoices over a certain dollar amount.

8. **Date – Invoice Dates Types** - The date type options allow the user to differentiate between Invoice Creation date, Invoice Discount date, Invoice Due Date, Supplier Invoice Date, Last Export Date, and Workflow Complete Date.

    a. Invoice Creation Date – when the invoice was created either by manual processes or through import.
    b. Invoice Discount Date - Select a range of **Discount Due Dates**. This is a date calculated by the system based on **Invoice Date** and invoice **Terms**. This is useful in determining invoices that are coming due where a discount can be realized.
    c. Invoice Due Date – Select a range of **Due Dates**. This is useful in determining invoices that are coming due.
    d. Last Export Date – Searches a specified date range according to the date which invoices were last exported to an external system.
    e. Last History Date - the date the document was last modified. This should correspond to the last entry seen on the history tab of the document.
    f. Supplier Invoice Date – also known as **Invoice Date**, determined by the supplier. This is the date that is used to calculate due dates and discount dates.
    g. Workflow Complete Date – Searches a specified date range according to the date the invoice completed or was rejected from the workflow process.
9. **Date** - In the **Date Range** drop-down menu, click on the drop-down arrow, scroll to and select the appropriate **Date Range** for the query. It defaults to **All Dates**. Options include:

   a. **All Dates** - Searches all documents without regard to date. Document search will default to All Dates if no other date range is selected. This means the search will run across the entire site history from the time it was created up to the current date. This may result in very large result sets. Once the user starts applying post filters, all relevant results will be pulled from the entire date range searched, not just the first 10,000 results.

   b. **Custom Date Range**
      - Enter **Start Date** manually (XX/XX/XXXX) or click on calendar to select a date
      - Enter **End Date** manually (XX/XX/XXXX) or click on calendar to select a date
      - Click OK button

   c. **Number of days** - Searches all documents in a selected range of calendar days
      - Last 7 Days - current date plus the previous 6 days), Last 30, 60, 90, or 120 days
      - Recent Time Frame; Yesterday and Today
      - Last Week - The Sunday through Saturday of the previous week
      - This Week – The Sunday starting the current week through the current date

   g. **Calendar** - Searches documents based on a calendar range
      - Month-to-Date - From beginning of calendar month to current date
      - Last Month - the last calendar month
      - Year-to-Date – From Jan 1st of current year to the current date
      - Previous Year – From Jan 1st through Dec 31st of the previous year

   h. **Fiscal** - Search documents based on an organization’s fiscal year
      - Fiscal Year-To-Date – Starts from the fiscal year (July 1st) through the current date
      - Previous Fiscal Year – July 1st thru June 30th
i. Other – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days).
   - Click on your specific Custom Other Date choice.
   - Enter the Specific Date in the blank field using the visible template
   - Click OK.

10. **Total Amount** – Use this search field for documents based on the total dollar amount.
   a. Select an operator from the drop-down box (Is Greater Than, Is Less Than, or Is Between)
   b. Enter a dollar amount.

11. **Supplier** – You may begin entering the supplier name. As you type the field will auto populate the supplier names that you enter. You may choose to search on the criteria you enter to view documents with products from suppliers with all the criteria in their name, or select a supplier from the list to limit results specifically to that supplier.

    Only those suppliers with hosted products are indicated with the hosted catalog icon. Other suppliers include non-catalog and punch-out suppliers.

    When the "Supplier" field is used on an advanced search, the "By Supplier" post filter is no longer available in search results.

    If the supplier post filter is needed, use the simple search interface. Partial supplier name searches can be performed from the simple search interface. The "By Supplier" post filter may show more supplier names than the user expected, but the multi-select post filter gives more flexibility to narrow the results. Once the results are refined through post filters, the user can save the search for future use without having to go through the post filter refinement process again.

    You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “Office Max, VWR” only documents that include both of those suppliers will be returned. The result set is produced.

12. **Department** – Enter the Department Organization Number “XXXXX” or the Organization Name. As you enter the search criteria, the field will auto populate with choices that match what you enter. You may click on the magnifying glass to use the search feature in this field.
For instance if you enter “210” in the Department field or in the search field, the system will auto populate with choices that include the numbers “210”.

13. **Catalog Number (SKU)** - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

Special characters in the catalog number are not supported for searching and should be omitted. For Example: the Greek letter mu is a special character, but cannot be used in the catalog number search in order to find a match. For a catalog number like: SPV-120 25µg, omit the 25µg portion and search on the first part of the catalog number.

14. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document.

For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.

Results produced:

15. **Commodity Code** - Enter Commodity Code or search for it by clicking on magnifying glass. To enter multiple codes, separate with commas. Selecting the ‘X’ to the right of the commodity code will remove it from the list.
16. **Form Name** – (Direct Payment, Blanket Purchase Order, etc.) Not available in All Documents or Receipts Search. Form name is an exact match, it must be typed in as it is in the system. Search for documents that contain a specific form by entering at least one word from the form name spelled correctly. The entire form name does not have to be entered, just one word. The word must be spelled correctly in order to find matching results. Including the full form name spelled correctly will yield the best results.

![Form Name Options]

17. **Form Type** - Enter the Form Type Name or click on the magnifying glass, then click on the checkbox next to the appropriate choice. You may also search by multiple form types. Click the **Add** button.

![Form Type Options]

18. **Product Flags** – Enter a checkmark in the checkbox to the left of the appropriate product flag to search for documents that contain the particular product flag. You may select multiple product flags. Results produced will display all documents with any of the three product flags contained in them.

![Product Flags Options]

19. **Contract Number** – If you know the specific Contract Number you may enter it.

20. **Purchase Order Number** - To search for Requisition(s) related to a purchase order(s), enter each purchase order number separated by a comma. This would return the Requisitions for each of the purchase order numbers listed in addition to the purchase orders.
21. **Workflow** - This search finds documents currently in the step selected. Workflow steps are different for a Requisition workflow, a Purchase Order workflow, and *Invoice workflow*. Therefore, this search must be performed for a single document type.

   a. Click on the magnifying glass
   b. Click on the checkboxes for the appropriate workflows you want to search
   c. You may click on as many as you need.
   d. Click the Add button.
   e. The selected step(s) will now appear in your search bar.

   ![Current Workflow Step](image)

   f. You may also begin typing the desired workflow step into the search bar located under the **Current Workflow Step** heading. Select the appropriate step listed in the drop-down menu.

   ![Workflow](image)

   g. Your selected workflow step will now appear in the search bar. To remove previously selected steps, click the X button located to the right of the desired step.

   ![Workflow](image)

   h. Selecting multiple workflow steps is also available. To do this, type the desired step into the search bar after selecting your previous step.

   i. **Advanced Dynamic Workflow** steps will also be included in the workflow step post-results filter. If you wish to review documents that are pending for a specific advanced dynamic workflow step, you can search for your documents and then filter by that specific ADW step.
22. **Workflow Status**—An **Invoice Folder** generally contains *Invoices* in the midst of the approval process. Workflow statuses indicate the current state of the *Invoice*. Click on the appropriate **Workflow Status** checkbox, see definitions below.

   a. **Pending** - This status indicates that Invoices or Credit Memos that are in Invoice workflow in a **Pending** status. These invoices or credit memos have not completed the Invoice Workflow process.
   
   b. **Rejected** - The status of invoices or credit memos are **Rejected** if all line items of the document have been rejected during Invoice workflow.
   
   c. **Completed** - Invoice or Credit Memos that are not **Rejected** and have completed Invoice workflow have a status of **Complete**. Workflow complete date can be observed on the Invoice history tab (the audit trail).

23. **Matching Status** – Click on the appropriate **Matching Status** checkbox, see definitions below.

   a. **Partially Matched** – To find documents (PO, receipt, or invoice) with one or more, but not all lines matched, add this status to the filters. Partial matches can occur only with a forced match on one or more line items.
   
   b. **No Matches** – To find documents (PO, receipts, or invoices) with no lines matched, add this status to the list of filters.
   
   c. **Fully Matched** - To find documents (PO, receipt, or invoice) with all lines matched, add this status to the filters.

24. **Invoice Source** – Click on the appropriate **Invoice Source** checkbox, see definitions below.

   a. **Manual**- The invoice or credit memo was created by a user via Settlement Manager
   
   b. **Supplier Portal** - The invoice or credit memo was created from the SciQuest Supplier Network (SQSN) portal invoicing process.
   
   c. **Electronic** - The invoice or credit memo was received electronically from the supplier (cXML or EDI) and created in Settlement Manager.
   
   d. **Supplies Manager** - The invoice or credit memo was created from the Supplies Manager invoicing process.

25. **Invoice Type** – Click on the appropriate **Invoice Type** checkbox, see definitions below.

   a. **PO Invoice** - Invoices in which at least one line is associated or linked to a purchase order within Order Manager. A PO invoice may contain non-PO line(s), line(s) that were not originally on a purchase order, and will still be listed as a PO Invoice containing non-PO lines.
   
   b. **Non-PO Invoice**- Invoices in which all line(s) are not associated, linked, to a purchase order.
c. **PO Credit Memo** - Credit Memo in which at least one line is associated or linked to a purchase order. A PO Credit Memo may contain non-PO line(s), line(s) that were not originally on a purchase order, and will still be listed as a PO Credit Memo containing non-PO lines.

d. **Non-PO Credit Memo** - Credit Memo in which **all line(s) are not associated**, linked, to a purchase order.

26. **Payment Status** – Click on the appropriate *Payment Status* checkbox, see definitions below.

   a. **In Process** - Select this option to view invoice that have *In Process* status associated with them. **In Process** invoices are invoices pending review or were just created.

   b. **Paid** - Select this option to view invoice that have **Paid** status associated with them. Invoices with the status of **Paid** have been marked as paid.

   c. **Payable** - Select this option to view invoice that have **Payable** status associated with them. Invoices with the status of **Payable** have been reviewed and marked as okay to pay

   d. **Cancelled** - Select this option to view invoice that have **Cancelled** status associated with them. **Cancelled** invoices are invoices that have been cancelled, i.e., it should be ignored.

27. **Status Flags** – Click on the appropriate *Status Flags* checkbox, see definitions below.

   a. **With Errors** – **Administrator USE ONLY**: The "with errors" status flag is intended to help administrators identify documents that are in error state. When a step enters an error state the document becomes searchable using the "with errors" status flag on the advanced search page. The "with errors" flag will allow administrators to view all documents that have a workflow step in error. They can then see the breakdown by workflow step in the workflow step filter provided on the results page.

   b. **Has Substitute Items** - not used in our version of BobcatBUY.

   c. **Pending Auto-Match** - not used in our version of BobcatBUY.

   d. **With Retainage** - The retainage field is used to withhold (or retain) a percentage or specific dollar amount of the invoice. The retainage amount is deducted from the invoice subtotal. Checking this box will return any invoice with a retainage value.

   e. **With Forced Matches** – Had to be okayed to pay. An example of this situation is when an invoice comes back higher than the original amount on the purchase order. The procurement staff member notifies the shopper to obtain authorization to pay. They then must Force Match the invoice.

   f. **Has Non-PO Lines** - not used in our version of BobcatBUY.

   g. **With Attachments** - The "With Attachments" filter will limit the search results to documents that have any of the following kinds of attachments:

      - Header: internal/external: URL or file
      - Line: internal/external: URL or file
      - Form: internal/external: URL or file
      - Comment: URL or file
28. **Custom Fields** – Custom fields allows the user to define more search criteria for their particular search.

![Custom Fields](image)

a. **HR_Person_ID**
   i. click in the drop-down box and choose one of the following:
      1. **Is Exactly**
      2. **Starts With**
      3. **Is Between**
   
   ii. You may enter the value in the blank field.
   
   iii. You may also click on the **Add another HR_Person_ID** link to add another person.

b. **Natural Account**
   i. click in the drop-down box and choose one of the following:
      1. **Is Exactly**
      2. **Starts With**
      3. **Is Between**

   ii. You may either enter the Natural Account Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.

   iii. You may also click on the **Add another Natural Account** link to add another natural account. Start the steps over again to select another.

c. **Prevailing Wage** - click the drop-down arrow and choose the **Yes/True** value.
d. **Project/Task**
   
   i. click in the drop-down box and choose one of the following:
   
   1. **Is Exactly**
   2. **Starts With**
   3. **Is Between**

   ii. You may either enter the Project/Task Value in the blank field or Click on the **Select from all values** link and search for the appropriate natural account value.

   iii. You may also click on the **Add another Project/Task** link to add another Project/Task. Start the steps over again to select another.

29. **Click the Go button after all criteria for your search has been selected.**
XII. Advanced Search – Receipt Option

To perform an advanced Receipt search, select Requisitions from the drop-down list. From here enter the information in the desired fields.
1. **Receipt Number(s)** – Multiple receipt numbers may be searched for by separating each number with a comma. The results will show documents related to those receipt numbers. Receipt number is also searchable in simple search, but only one receipt number at a time can be combined with other search terms.

2. **Receipt Name** - If you know the name or title of the receipt, enter it here.

3. **Packing Slip Number(s)** - Multiple packing slip numbers may be searched for by separating each number with a comma. The results will show documents related to those receipts. Packing slip number is also searchable in simple search, but only one packing slip number at a time can be combined with other search terms.

4. **Tracking Number(s)** - Multiple tracking numbers may be searched for by separating each number with a comma. The results will show documents related to those receipts. Tracking number is also searchable in simple search, but only one tracking number at a time can be combined with other search terms.

5. **Participant** - This means any user that has touched the document and is in the audit trail for the document. You may search by username, first name, last name, or their email address. You may search multiple participants at one time by separating the values with a comma.

Results produced display all documents touched by both Joan Wigal and Joyce Childs in the specified Date Ranges and other criteria entered in the search fields.

9. **Received By** – When a receipt is manually entered, the person who created the receipt is the received by user.

10. **PO Owner – Owner** - The owner is usually the person for whom the document was created. Usually this is the person that originated and submitted the document, or “the prepared by” user.

11. **Date** – First, select the type of date in the drop-down field, then choose the Date Range.
   a. **Create Date** - when the draft cart was created, which could be a different day than when the cart is submitted to workflow
   b. **Complete Date** - when workflow for the Requisition is marked as complete or for a cart return Requisition, this is when the cart return is complete (*punchout complete*).
   c. **Last History Date** - the date the document was last modified. This should correspond to the last entry seen on the history tab of the document.
   d. **Receipt Date** – The date the receipt was created.
12. **Date – Next, pick a Date Range.** In the **Date Range** drop-down menu, click on the drop-down arrow, scroll to and select the appropriate **Date Range** for the query. It defaults to **All Dates.** Options include:

a. **All Dates**- *Searches all documents without regard to date.* Document search will **default to All Dates if no other date range is selected.** This means the search will run across the entire site history from the time it was created up to the current date. This may result in very large result sets. Once the user starts applying post filters, all relevant results will be pulled from the entire date range searched, not just the first 10,000 results.

b. **Custom Date Range**
   - Enter **Start Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Enter **End Date** manually (XX/XX/XXXX) or click on calendar to select a date
   - Click OK button

   ![Calendar Range](image)

   -

c. **Number of days**-Searches all documents in a selected range of calendar days
   - Days:
     - Last 7 Days-current date plus the previous 6 days), Last 30, 60, 90, or 120 days
     - Recent Time Frame; Yesterday and Today
     - Last Week - The Sunday through Saturday of the previous week
     - This Week – The Sunday starting the current week through the current date

d. **Calendar**-Searches documents based on a calendar range
   - Month-to-Date-From beginning of calendar month to current date
   - Last Month-the last calendar month
   - Year-to-Date – From Jan 1st of current year to the current date
   - Previous Year – From Jan 1st through Dec 31st of the previous year

e. **Fiscal**- Search documents based on an organization’s fiscal year
   - Fiscal Year-To-Date – Starts from the fiscal year (July 1st) through the current date
   - Previous Fiscal Year – July 1st thru June 30th

f. **Other** – Custom dates that can be customized with templates (Before X Date, After X Date, Last X Days, Next X Days, Before the Last X Days, After the Last X Days).
   - Click on your specific Custom **Other Date** choice.
   - Enter the **Specific Date** in the blank field using the visible template
13. **Supplier** – You may begin entering the supplier name. As you type the field will auto populate with the supplier names that you enter. You may choose to search on the criteria you enter to view documents with products from suppliers with all the criteria in their name, or select a supplier from the list to limit results specifically to that supplier.

Only those suppliers with hosted products are indicated with the hosted catalog icon. Other suppliers include non-catalog and punch-out suppliers.

When the "Supplier" field is used on an advanced search, the "By Supplier" post filter is no longer available in search results.

If the supplier post filter is needed, use the simple search interface. Partial supplier name searches can be performed from the simple search interface. The "By Supplier" post filter may show more supplier names than the user expected, but the multi-select post filter gives more flexibility to narrow the results. Once the results are refined through post filters, the user can save the search for future use without having to go through the post filter refinement process again.

You may enter more than one search criteria separated by a comma. Keep in mind the search will produce result sets that only include all the search criteria entered in the field. If you enter “Office Max, VWR” only documents that include both of those suppliers will be returned.

14. **Department** – Enter the Department Organization Number “XXXXX” or the Organization Name. As you enter the search criteria, the field will auto populate with choices that match what you enter. You may click on the magnifying glass to use the search feature in this field.

For instance if you enter “210” in the Department field or in the search field, the system will auto populate with choices that include the numbers “210”.
15. **Catalog Number (SKU)** - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. The search will return matches for the supplier catalog number and the manufacturer catalog number. If the catalog number was used on a form, documents with that form should be returned in the search results as well. You may search for single part numbers only. Hyphens and spaces are ignored when searching.

Special Characters in the catalog number are not supported for searching and should be omitted. For Example: the Greek letter mu is a special character, but cannot be used in the catalog number search in order to find a match. For a catalog number like: SPV-120 25µg, omit the 25µg portion and search on the first part of the catalog number.

16. **Product Description** – Does not have to be the exact description. Search criteria will produce any documents that have those words entered in the product description on that particular document.

For example, if you enter “aprons” in the field it should produce any document with “aprons” in the product description.

Results produced:

17. **Product Flags** – Enter a checkmark in the checkbox to the left of the appropriate product flag to search for documents that contain the particular product flag. You may select multiple product flags. Results produced will display all documents with any of the three product flags contained in them.
18. **Purchase Order Number** - To search for Requisition(s) related to a purchase order(s), enter each purchase order number separated by a comma. This would return the Requisitions for each of the purchase order numbers listed in addition to the purchase orders.

19. **Receipt Type** Click on the appropriate *Receipt Type* checkbox, see definitions below.
   a. **Quantity** – To find quantity receipts that were created.
   b. **Cost** – To find cost receipts that were created.

20. **Matching Status** - Click on the appropriate *Matching Status* checkbox, see definitions below.
   a. **Partially Matched** – To find documents (PO, receipt, or invoice) with one or more, but not all lines matched, add this status to the filters. Partial matches can occur only with a forced match on one or more line items.
   b. **No Matches** – To find documents (PO, receipts, or invoices) with no lines matched, add this status to the list of filters.
   c. **Fully Matched** - To find documents (PO, receipt, or invoice) with all lines matched, add this status to the filters.

19. **Receipt Source** Click on the appropriate *Receipt Source* checkbox, see definitions below.
   a. **Manual** – To find receipts that were manually created.
   b. **Imported** – To find receipts that were imported.

20. **Receipt Flags** Click on the appropriate *Receipt Flags* checkbox, see definitions below.
   **With Forced Matches** – The Invoice had to be okayed to pay. An example of this situation is when an invoice comes back higher than the original amount on the purchase order. The procurement staff member notifies the shopper to obtain authorization to pay. They then must Force Match the invoice.

21. **Click the Go button after all criteria for your search has been selected.**
XIII. Switch From Advanced Search back To A Simple Search

If the user decides to utilize a simple search after accessing the Advanced Search feature, simply click one the Simple Search links found either in the Go to: section or in the top right corner of the search box.

NOTE: BobcatBUY remembers the last search the user performed and brings that particular feature up when the user accesses BobcatBUY Document Search feature each time. To switch back and forth, either click on the Simple Search link or the Advanced Search link.

XIV. Post Filter Options

There are a series of post filter options available from the results of a document search that are very similar to product search. Examples of post filter options include: Supplier, User, Department, Workflow Step, and Workflow Status. The post search filters are available that allow the user to define additional criteria for the search results.

For example, if you perform a search for POs, you can narrow your results by a specific department. The filter options, which display on the left side of the search results, function similar to those in Product Search. These post filters look and act just like the post filters that are available with product search. Post filtering allows the user to further narrow down their results.

Post Filter options change based on the document type you are searching for. (Example: If you perform a Purchase Order search, your post filter options will be PO specific and will look different from your post filter options if you do a Requistion search)

The user is allowed to select multiple post filter options. (Example: You can select 2 suppliers and 2 departments at the same time).
Post Filter options are found in the sidebar to the left side of the results in the **Filtered By/Refine Search Results** section.

1. To apply a filter, simply click the desired filter option and the page will automatically refresh with your new results. Once a filter is applied it is visible in the "**Filtered By**" section just above the "Refine Search Results" section. The filter group is no longer available under "Refine Search Results" once an option from the group is applied.

2. If the user decides they do not want a previously selected filter, simply uncheck the box next to the undesired filter in the **Filtered By** section.

3. Additionally a **remove all** link is available in the **Filtered By** section to remove all previously selected filters.

4. The "**Refine Search Results**" section listing the post filters can be **collapsed and hidden** to the left side of the screen by clicking the vertical grey bar separating the "Refine Search Results" section from the search results table.
   a. Click the bar once to hide the "Refine Search Results" section.
   b. Click the bar again to unhide the "Refine Search Results" section.
XV. Quick View: Next & Previous

Quick View within Document Search contains a Next & Previous link. The Quick View is a read only view of the document. This link allows users to scroll through their search results without having to navigate back to the results and select the next one.

1. To use the quick view feature, after a search has been performed, click on the icon next to the document number that looks like a document with a magnifying glass over it.
2. The amount of documents available to scroll through will be the same as your results per page setting. If your results per page setting is set to 20 for your search results, then you will be able to scroll through 20. In order to see more, navigate back to your search results and change the results per page or select another page of results.

3. To utilize the next & previous feature, simply click the next or previous links found at the top of the page while in quick view.

4. To return to your search results, click one of the close buttons or the X button, located in the top right hand corner and the bottom middle of the Document Navigator Display.

XVI. Saving Searches

Searches can be saved and executed at any time. Saved searches use relevant date information (instead of static dates like History searches use). For example, if you save a search for all POs for the last 7 days, it will show exactly that, no matter what date it is executed. Saved searches are accessed through the Orders & Documents icon on the side navigation bar, and are saved by name and description. Use the Save Search button to create a new saved search and place it in an existing folder or open a new folder. Save search feature will bring up a popup window. Saved searches can be shared with other users, departments, business units, or roles.

Saved searches now look very similar to favorites. Users may create their own folders to organize and manage saved searches. For example, a user may want to create a folder for PO Searches, and another folder for the PR searches.

When a search is saved, the user is saving the search criteria including any keywords, date ranges, and post filters. Any search can be saved including advanced searches.
1. To save a search, click the **Save Search** button located in the left sidebar of the page under the *Filtered By* heading.

![Filtered By]

2. A pop-up window will ask for a title. An optional description may be added by clicking the add description link located under the title field.

![Add to Saved Searches]

3. If necessary create a new top level personal folder or subfolder of the selected folder. Enter a name and an optional description of folder.

![Create New Personal Favorites Folder]

4. Choose appropriate location to save the search, either the newly created folder or a previously existing folder.
5. Click the **save button**. Another pop-up window will inform the user the search has been saved. **Click the close button.**

6. Once a search is saved it can be run by clicking **Orders & Documents>Document Search>View Saved Searches.**

7. To execute a saved search, click on the appropriate folder (the location in which you saved the search),

8. Then click the title of the saved search.
9. Additionally from the *saved searches tab*, the user has the ability to add a shortcut of the desired saved search to the main search tab, which can be accessed via Orders & Documents>Document Search>. Click the **Add Shortcut** button located to the right of the appropriate search title.

![Add Shortcut Example](image)

10. The saved searches shortcuts box will appear beneath the simple search interface. This displays the saved search name and an export link. The shortcut can now be located by clicking on **Orders & Documents>Document Search>Search Documents**. In the middle of the page under the **Saved Searches Shortcuts** heading, a search can now be run with 1 click.

![Saved Searches Shortcuts Example](image)

**NOTE:** If you do not see the Saved Searches Shortcuts displayed, **click the simple search link in the top right-hand corner of the window**. This only displays in the Simple Search window.

11. To **Edit a previously saved search**, clicking on **Orders & Documents > Document Search > View Saved Searches**. then click the **edit** link located to the right of the desired search.

![Edit Shortcut Example](image)

12. The same pop-up window containing search name and description is accessible here, adjust appropriately then click the **submit button**.
13. A pop-up Edit Searches window is displayed, Click the Close button.

14. **To Delete a search**, clicking on Orders & Documents>Document Search>View Saved Searches. then click the Delete link located to the right of the desired search.

15. Then click the okay button in the pop-up window.

16. To **Move/Copy a Saved Search**, clicking on Orders & Documents > Document Search > View Saved Searches. Then click the Move/Copy link located to the right of the desired search.

17. **Choose** the appropriate folder in which you want to store your saved search.
18. Click on the **Move** button or the **Copy** button, which ever is appropriate.

19. Click on the Go Button to open the search results.

**XVII. Editing And Starting A New Search**

At the top of the *search results* page links are available that allow the user to edit their current search, or start a new one. If the user selects the **Edit Search** link, they will be returned to the search page and all previously entered search criteria will be retained.

1. To edit a search, click the **Edit Search** link found at the top left side of the page. The user now has the opportunity to change any of the previous search criteria chosen. Editing a search is available for both *simple searches* and *advanced searches*. 

*Shopper, Approver, and Requester*

Document Search – v 13.3

Questions? Call **597-6446** or email **procurement@ohio.edu**
2. To start a new search, click the **start new search** link found at the top left side of the screen. This will result in the user returning to either the advanced search screen or the simple search page. BobcatBuy remembers which search screen was utilized most recently and will return the user to that screen. If you are returned to the Advanced Search screen and want to move to the Simple Search screen, click on the Simple Search link. If you are returned to the Simple Search screen and want to move to the Advanced Search screen, click on the Advanced Search link.

**XVIII. Exporting Search Results**

**NOTE:** Users will be able to export search results when they have either searched on or filtered on a specific document type.

**Warning:** The Export Search Results feature is unavailable when total results exceed 50000.

1. To export search results you must be in the Document Search screen with your Search Results displayed from your most recent search inquiry.

2. Click the **Export Search** button found in the left sidebar, under the **Filtered By** heading.
3. A Request Export pop-up screen will appear, enter **File Name** and **Description**. The Description text box is limited to 1000 characters.

4. Click on the down-arrow in the **Export Type** field and choose the appropriate export type:
   
   a. **Screen Export**:
      
      i. **Screen Exports** are available in all five export locations: PR, PO, Receipt, Invoice, and Fulfillment PO. This export type will produce an export of all items returned in the search, but only includes the document data returned in the on-screen columns. The export is provided in a zipped Microsoft Excel files

      ii. Click the **Submit Request** button.

      iii. An email confirmation will be sent to all users designed to receive them in the Email Preferences (once the export request is complete). If your email is not setup and you would like to receive an email notification make sure ‘Search Result Export Confirmation’ is selected in your Email Preferences.

Example of **Email Confirmation**:
iv. Click on the emailed URL link to access your export file in BobcatBUY. The link will open up the Search Results Export screen. **You may also access the exported file directly.**

v. Click **Orders & Documents>Document Search>Download Export Files>Search Results Exports** to view pending and completed export files.

vi. Click on the **Download Exports** tab (it should be defaulted).

**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.

vii. Click on the **File Name** link to open the .zip file. The file will be downloaded to the bottom left-hand side of your open screen.

1. **Pending Status** under the Export Status means that the export is currently being queued by the system. This process could take several minutes to several hours depending on the amount of data being exported.

2. **Complete Status** under the Export Status column means that the export is available to download.
viii. Click on the **downloaded file** to open.

ix. Click on the **zip file** to open.

x. View the excel report.

b. **Transaction Export**

i. The **Transaction Export** provides more information on the documents returned in the search. This export provides more information than the Screen Export but is not a Full Export. The Transaction Export is not available for Fulfillment POs. The export is provided in a zipped Microsoft Excel file.

ii. Click the **Submit Request** button.

c. An email confirmation will be sent to all users designed to receive them in the Email Preferences (once the export request is complete). If your
email is not setup and you would like to receive an email notification make sure ‘Search Result Export Confirmation’ is selected in your Email Preferences.

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**Re: Search Result Export Complete - PPMO Computer Purchases**

Dear Gina Rider,

The search result export you requested is now complete. You may view the export results by selecting the URL below:


****

If you have any questions with regard to this export, please contact your SelectSite Support Team.

Support Team Contact Information:
+1 (740) 597-6446
procurement@ohio.edu

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d. Click on the emailed URL link to access your export file in BobcatBUY. The link will open up the Search Results Export screen. You may also access the exported file directly.

e. Click **Orders & Documents > Document Search > Download Export Files > Search Results Exports** to view pending and completed export files.

f. Click on the **Download Exports** tab (it should be defaulted).

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g. **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.

h. Click on the **File Name** link to open the .zip file. The file will be downloaded to the bottom left-hand side of your open screen.

1. **Pending Status** under the Export Status means that the export is currently being queued by the system. This process could take several minutes to several hours depending on the amount of data being exported.
2. **Complete Status** under the Export Status column means that the export is available to download.

   i. Click on the **downloaded file** to open.

   j. Click on the **zip file** to open.

   k. View the excel report.

   **l. Full Export**

   i. The **Full Export** provides the same data as the monthly data extracts up to 4,000 POs. The export is provided in four zipped Microsoft Excel files. The Full Export is only available for Requisitions and POs.

   ii. Click the **Submit Request** button.
iii. An email confirmation will be sent to all users designed to receive them in the Email Preferences (once the export request is complete). If your email is not setup and you would like to receive an email notification make sure ‘Search Result Export Confirmation’ is selected in your Email Preferences.

iv. Click on the emailed URL link to access your export file in BobcatBUY. The link will open up the Search Results Export screen. You may also access the exported file directly.

v. Click Orders & Documents>Document Search>Download Export Files>Search Results Exports to view pending and completed export files.

vi. Click on the Download Exports tab (it should be defaulted).

**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.

vii. Click on the File Name link to open the .zip file. The file will be downloaded to the bottom left-hand side of your open screen.
1. **Pending Status** under the Export Status means that the export is currently being queued by the system. This process could take several minutes to several hours depending on the amount of data being exported.

2. **Complete Status** under the Export Status column means that the export is available to download.

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viii. Click on the **downloaded file** to open.

ix. Click the **Open** button.

x. Click on the **zip file** to open.

xi. View the excel reports produced in the Full Export.
XIX. Filter Exports in the Download Exports Window

Use the Search Export filter options to narrow down the history entries to a specific date range or export status. To use the filter options

1. Click the + next to the word Filter on the left side of the page. From here the user may choose various options depending on what they are looking for.

2. Start Date - Enter the starting date for a date range filter. The Search Export entries displayed will be no earlier than this date.

3. End Date Enter the end date for a date range filter. The Search Export entries displayed will be no later than this date.

4. Show Completed Exports Only - Use the Show Completed Exports Only checkbox to view only those exports that have achieved a Completed status. Selecting this checkbox will not display Search Exports that are pending or are in an error state.

5. After the appropriate options are chosen, click the Apply button. The page will automatically refresh with the users desired results.

XX. Templates

The templates provided in this section are designed to work with various types of data extracts available in BobcatBUY. They include instructions on what data to use, where to insert it, and how to interpret the results.

1. Select a template from the lists below to analyze a .csv data extract file.
   Click on the name of a specific template file name in order to open or download it. Each template is designed for use with a specific type of data (i.e. Req or PO).

2. Purchasing Templates
   These templates are for use with purchasing or transaction data contained in files in the Monthly Data Extracts section.
   a. PO Purchasing Template
   The PO Purchasing Template is designed for use with Purchase Order data. From the appropriate month's .zip file open the POData_MMMYY_OrgID.csv file. Follow the instructions on the PO template's first worksheet for copying the data from the monthly file into the PO template.
b. Req Purchasing Template

The **Req Purchasing Template** is designed for use with Requisition data. From the appropriate month’s .zip file open the **ReqData_MMYYYY_OrgID.csv** file. Follow the instructions on the Req template's first worksheet for copying the data from the monthly file into the Req template.

XXI. Recurring Exports

Recurring Exports are exports that have been scheduled to run at a pre-determined interval from an eligible saved document search.

1. Start by selecting or creating a saved document search. The date range must be one of the following:
   a. Last Week (Sunday-Saturday) or the previous week
   b. Last Month – Last calendar month

2. Click on **Create From Saved Search** button or the **Create New Search** button. Choose an existing file or create a new search. Be sure the date range is one of the choices listed above. Once you either retrieve an existing saved search or you create a new search

3. Click the **Save Search** button.


5. Select the Destination Folder

6. Click in the Create Recurring Export checkbox.

7. Choose the Export Type;
   a. Screen Export- **Screen Exports** are available in all five export locations: PR, PO, Receipt, Invoice, and Fulfillment PO. This export type will produce an export of all items returned in the search, but only includes the document data returned in the on-screen columns. The export is provided in a zipped Microsoft Excel files
   b. Transaction Export- **Transaction Export** provides more information on the documents returned in the search. This export provides more information than the Screen Export but is not a Full Export. The Transaction Export is not
available for Fulfillment POs. The export is provided in a zipped Microsoft Excel file.

c. Full Export- The **Full Export** provides the same data as the monthly data extracts up to 4,000 POs. The export is provided in four zipped Microsoft Excel files. The Full Export is only available for Requisitions and POs.

8. Click the **Save** button.

9. An Add to Saved Searches pop-up window appears,
   a. Click on the **Click here to view/manage your currently scheduled exports**, or
   b. Click the **Close** button to close window.

10. If you Click on the **Click here to view/manage your currently scheduled exports**, the Recurring Exports screen opens.

11. Click on the **show schedule details** link above the Currently Scheduled Exports schedule to show schedule.
a. The Description column is the name given when saving the document search.

b. The Export Type was chosen when creating and saving the Recurring Export.

c. The interval is the frequency at which the export was initially run.

d. The action of Delete will delete the recurring scheduled export.

e. Schedule Create Date is the date that the recurring export was initially scheduled.

f. Schedule Expire Date is the date that the recurring export will expire (1 year from the create date)