Bobcat*BUY* Document Search

Document Search

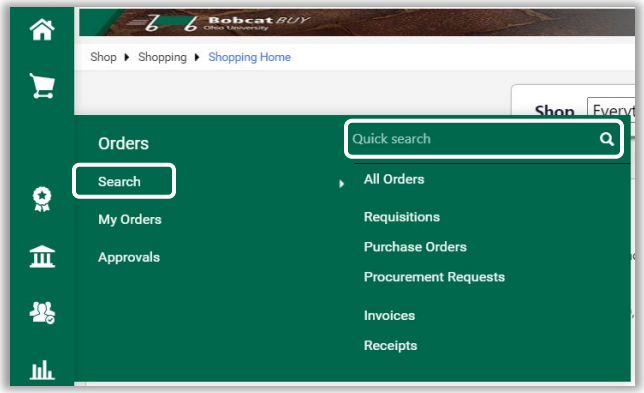
Bobcat*BUY* (BCB) has enhanced their document search feature to include a more "elastic" search. What does an elastic search mean? It means you will have a faster search experience with more options to search and export. In this guide you will learn how to execute a search, save specific search criteria, and exporting options.

This information can be found in Oracle Business Intelligence (OBI) searches, however using the new search features in BCB will provide you real-time information on Requisitions, Purchase Orders (POs) and Invoices.

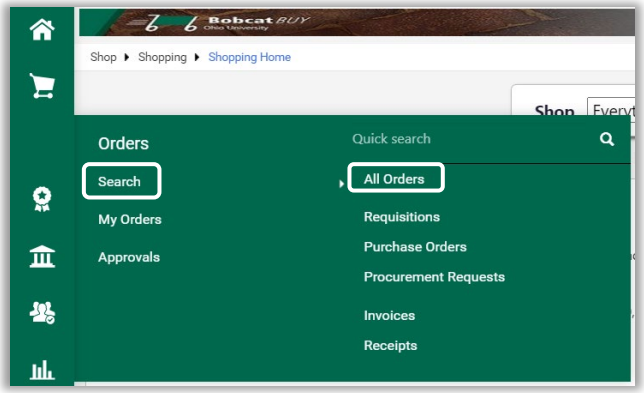
Performing a Search

To perform a document search, click on the Orders menu on the left, then select the Search option. From here you can select what you would like to search for: all orders, requisitions, POs, or invoices.

You can always perform a keyword search by clicking in the Quick Search text field, type your query, and click the magnifying glass to search.

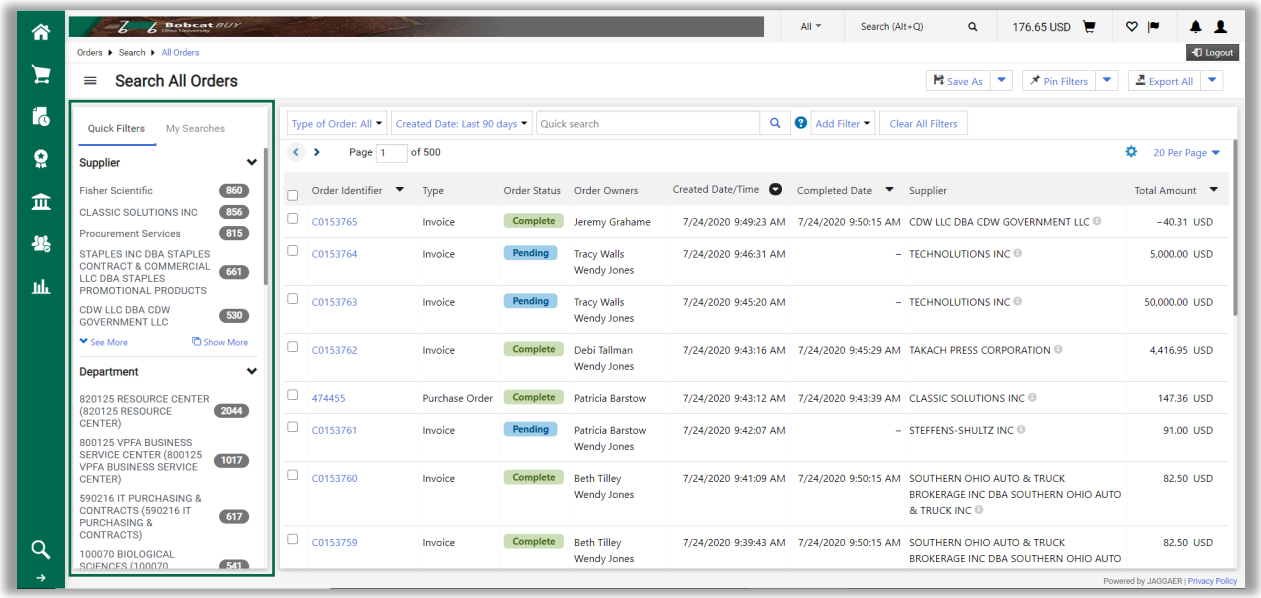


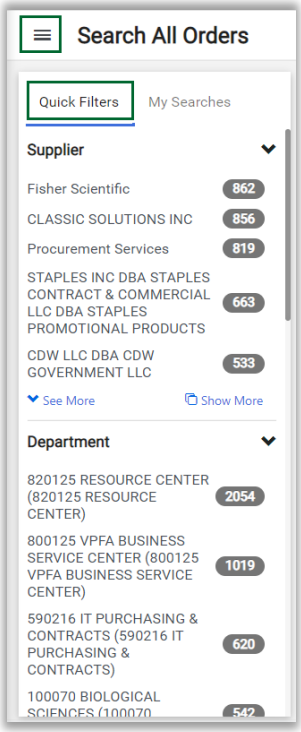
Let's perform a document search. We will begin by clicking on Search in the Orders menu and select the "All Orders" option. You will see a list of search results, let's review how to customize your document search results so that you can get the information you need quickly and easily.



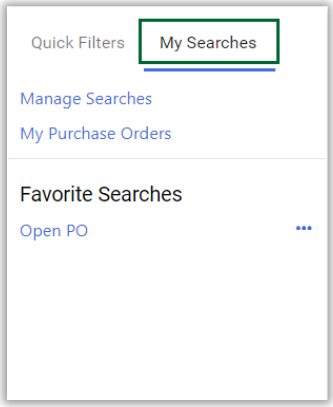
On the left side of the screen click the three stacked bars to open or close the Quick Filters. Quick Filers allow for you to search for options like Supplier, Department, Order Owner, Approved By, etc. The Quick Filters show

the top **FIVE** items for each category.



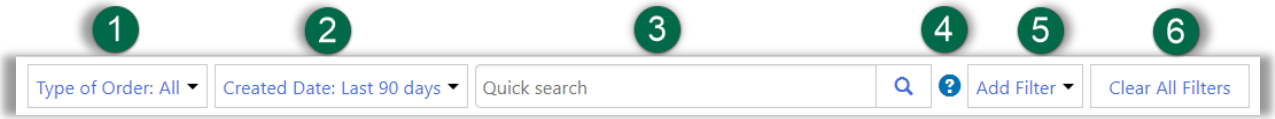


The My Searches tab (to the right of the Quick Filters tab) is where all your saved searches can be found.

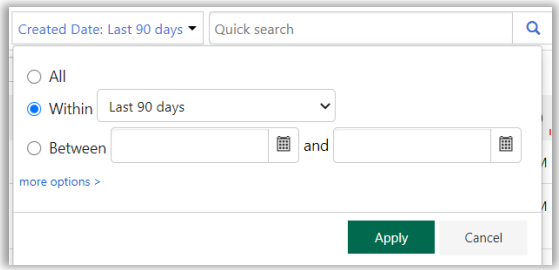


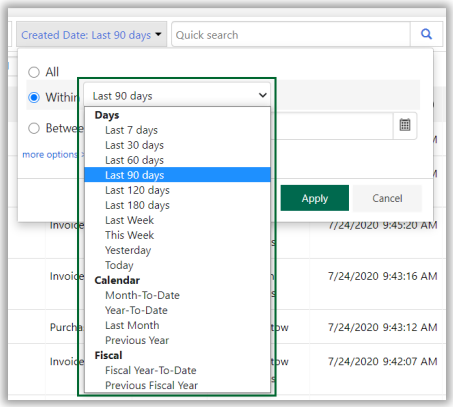
Adding Filters

Let's look more into the filters available. Along the top of the screen you will find all the filters available.

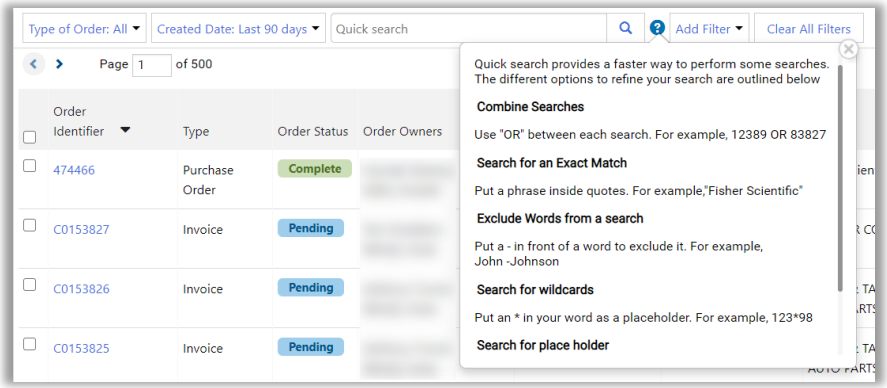


1. In the "Type of Order" drop-down you can select the type you would like to see: Invoice, Purchase Order, Receipt, or Requisition.
2. The Created Date drop-down is defaulted to 90 Days, but you can change it to see All, Within, or Between (specific dates).

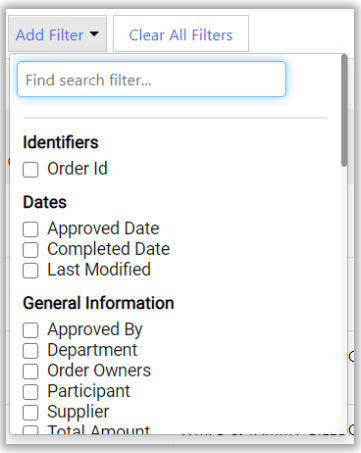




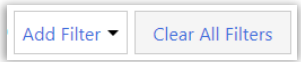
3. If you know what you would like to search for specifically, use the Quick Search option to easily find what you need.
4. To find quick search help, click the question mark. To close the help window, click the X



5. To add additional filters to choose from, click the Add Filter drop down and place a check in the check box next to the filter you would like to add. Scroll through the list to add to the search results. You can also search for filters by typing a search term in the Find search filter… text box.



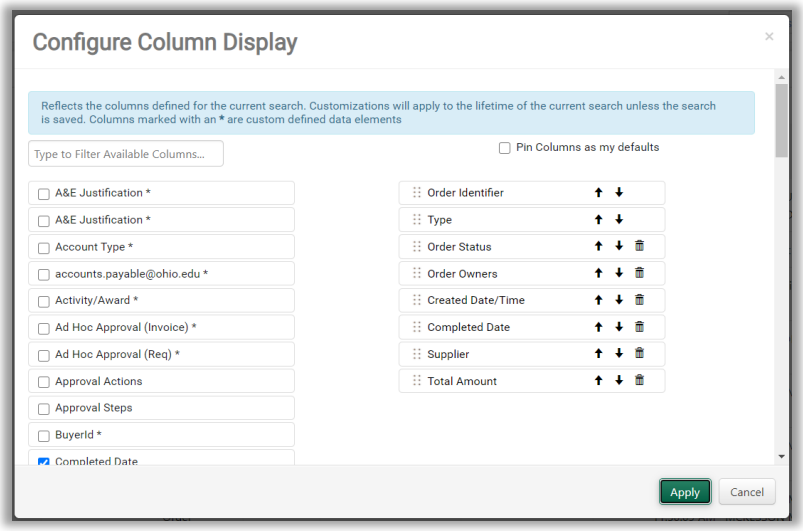
6. To reset your search to the defaults, select the Clear All Filters button.



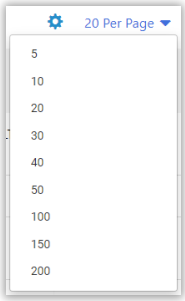
Now that we have reviewed the filters, let's look at the next row of tools available.

1. Page forward and page back buttons
2. Jump to page
3. Configure Columns (gear) – On the left side of the pop-up window, you can scroll through the list of available columns to add to your search results, which appears on the right. Click the check box to add

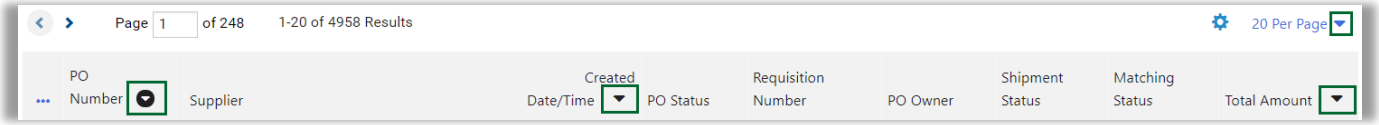
to the results. In the selected columns on the right side, you can use the up and down arrows to move the column to the left (up) or right (down) as it appears in the results. Click the garbage can icon to remove it from the list. You can also reorder the selected columns by clicking the item and moving it up and down on the list. Once the columns are set up, you can save the configuration as your default by clicking the Pin Columns as my defaults check box. Click the apply button at the bottom right to add the display to your results.



4. The default setting for number of search results is 20 Per Page. Click the blue hyper link to select more of fewer results per page.

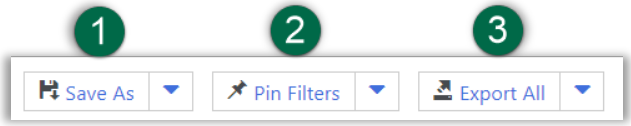


Additionally, any column header with a carrot is a sortable column. If the carrot is pointing up it is in ascending order, if it is pointing down it is in descending order.

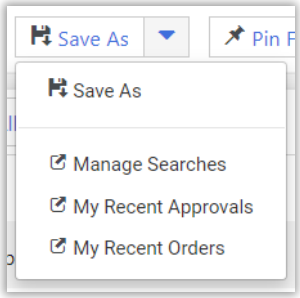


Sorting and Saving Search Criteria

Once you have the data set up the way you would like to view it, you have a few more options available to you to save the search criteria.

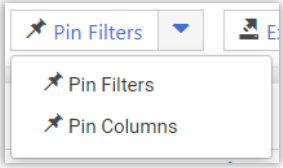


1. Save As: By selecting the Save As button you have the option of saving the search criteria for later use. The actual search won't be saved but the criteria that you used to get those results will be saved. Saving the search will save the columns, filters, and configuration for the whole search.

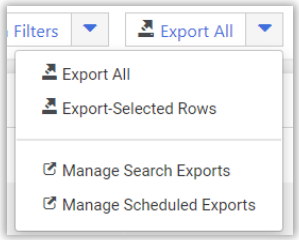


You can also manage your saved searches, your recent approvals, or recent orders from here as well.

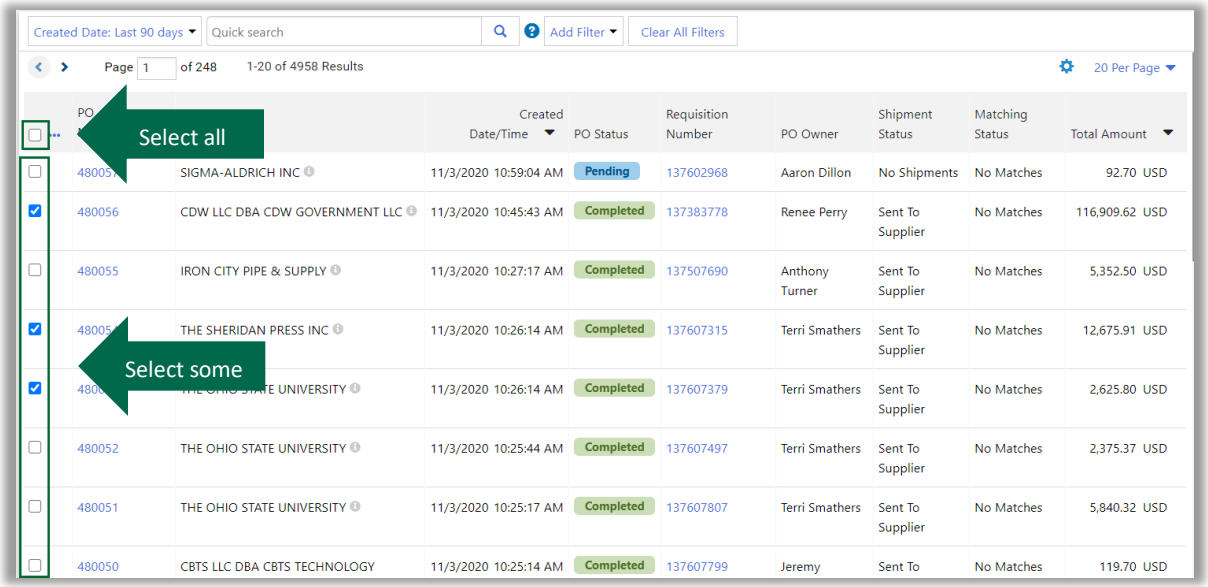
2. Pin Filters: Use the Pin Filters option to keep the filters the way you have them currently set up. Use the Pin Columns option to save the column configuration as they are currently set up. This will save you time in the future by not needing to reconfigure the filters or columns each time you search.



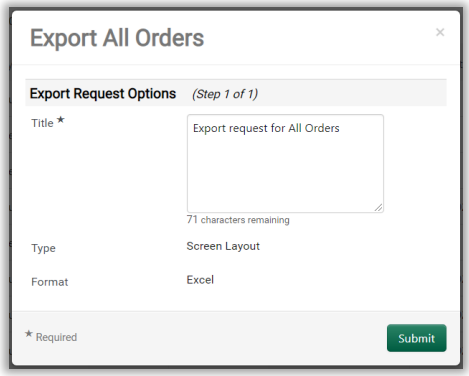
3. Export All: To export the full search results, select the Export All option. To only export specific rows, select the Export Selected Rows option.



Select the rows you would like to export before clicking on the Export Selected Rows option. You can also Manage your Search Exports and Scheduled Exports from here as well.



To export your search results, click the Export All option. When the pop-up window appears, add a title to the report and click the Submit button at the bottom right of the pop-up window.

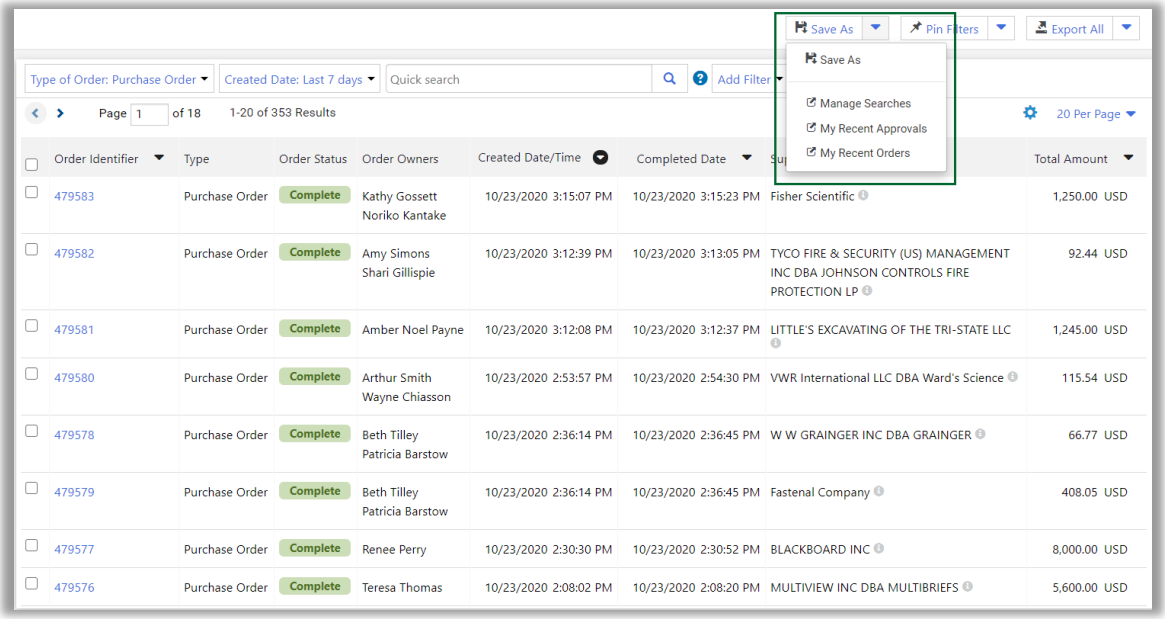


Saving a Search

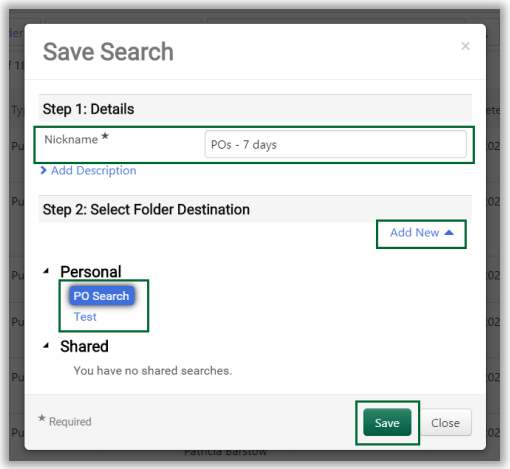
Once you have your search criteria set and the report completed, you may save the search. Saved searches are created from the search results page. When you choose to save a search you are essentially saving the search you executed to get to that results page; essentially you are saving the search criteria and filters, not the search results. Saved searches are organized in folders in the My Searches tab or in Manage Searches. You can create your own personal folders to store your various searches. Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. When viewing saved search results, you can add filters to modify results, and save the existing search or save the updated criteria as a new saved search.

Let's walk through the steps to save a search.

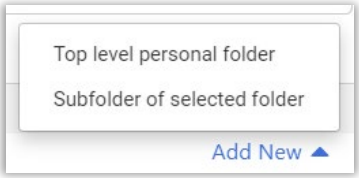
1. Once you have all your search criteria and filters applied and are ready to save the search, click Save As… at the top right of the screen. Select Save As to save the search.



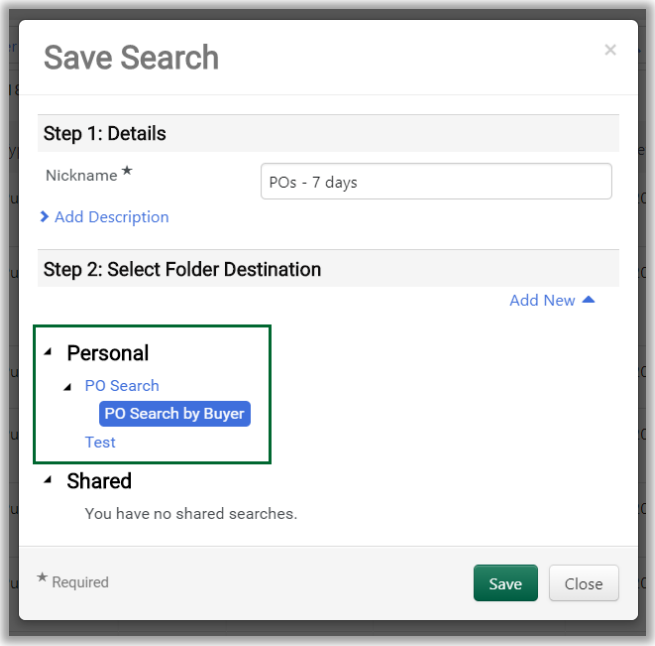
2. You will see a new pop-up window appear. Enter the search Nickname and select the folder you would like the report saved in by highlighting the folder name. Select the Add New hyperlink to add a new folder to list.



3. To add a new folder, click the Add New hyperlink. Select Top level personal folder to add a new top-level folder and select sub folder of selected folder to add a subfolder.

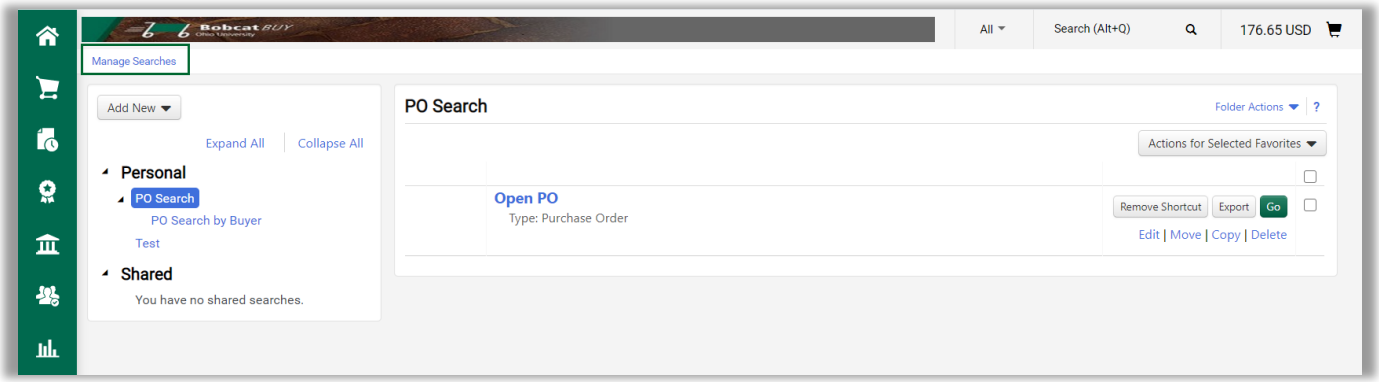


4. Click Save to add to the list.

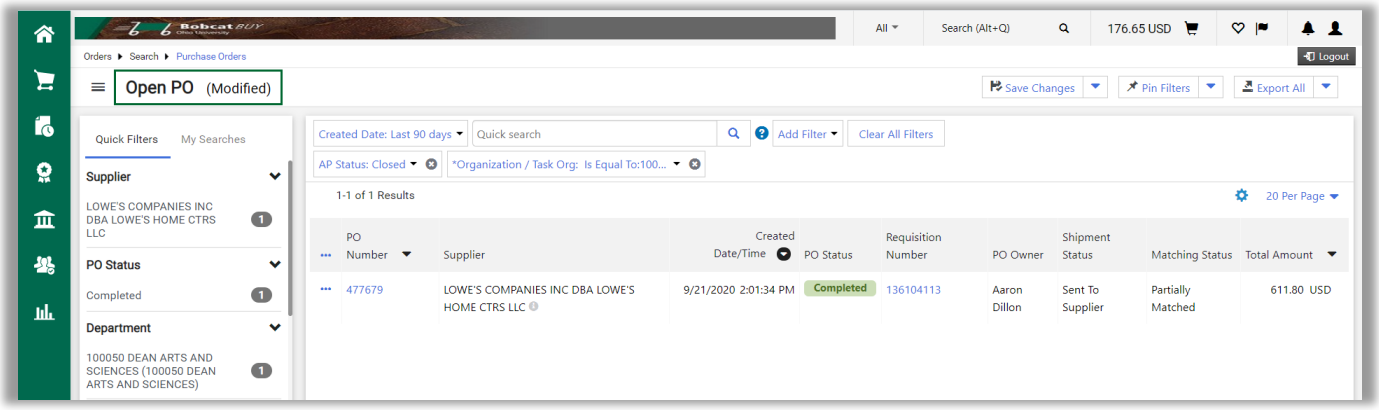


Editing a Saved Search

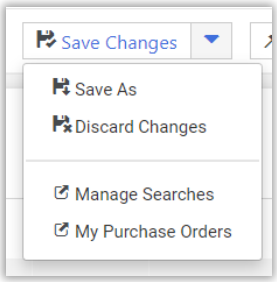
To edit a saved search, navigate to Manage Searches and run the search you would like to edit. To run the search, click the Go button or the search name.



Make any adjustments needed to your search criteria. A modified indication is displayed next to the saved search name.



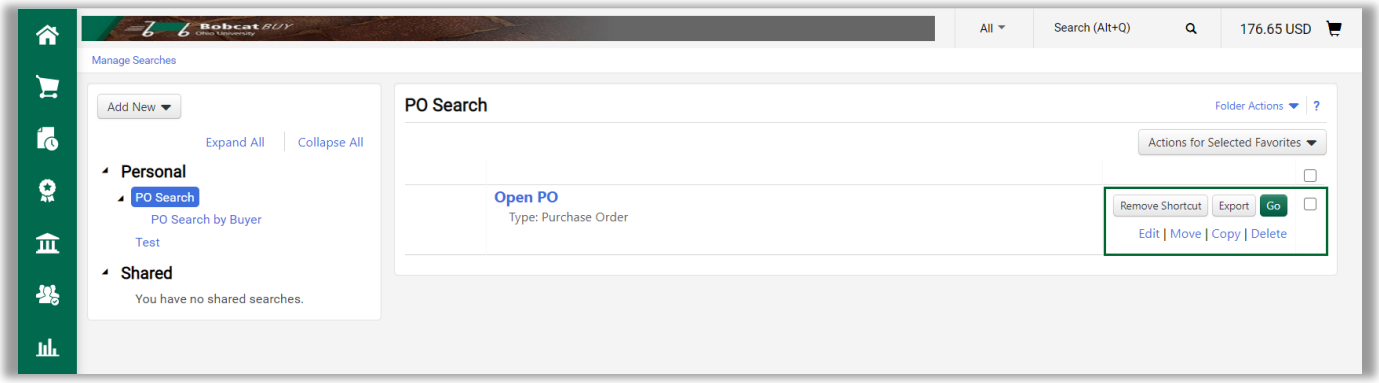
Click the Save Changes drop down and select from the following options:



- Save Changes – select if you want to save the existing saved search with the updated criteria. Confirm your choice by selecting yes or no to save or delete the updates.
- Save As – select if you would like to save this as a new search. If you select this, your original search will remain unchanged.
- Discard Changes – to remove all changes since the last save.

Moving, Copying, Editing a Search Name, and Deleting a Search

To make updates to a search or to delete it, navigate to the Manage Searches page.



To edit the search name or description, select the Edit hyperlink. Make the necessary changes and save the changes. To edit multiple names and descriptions select the check boxes next to the appropriate searches, then select Edit.

To move the search, select the Move hyperlink. Select the destination folder or add a new folder and save the changes.

To copy the search, select the Copy hyperlink. Select the destination folder or add a new folder and save the changes.

To delete the search, select the Delete hyperlink. To delete multiple Searches select the check boxes next to the appropriate searches, then select Delete.

Exporting Search Results

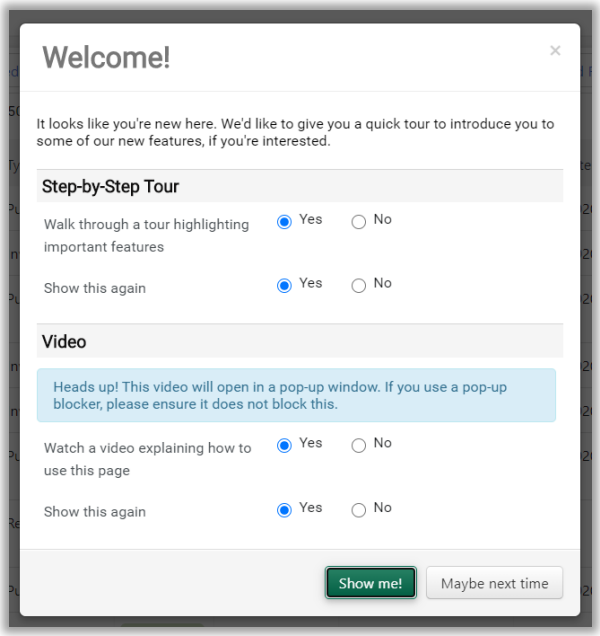
When you perform a document search you may want to export the results for further reporting and analysis. The export feature allows you to export all or selected results upon request and to schedule instances of certain report types.

When you export a search, a .zip archive is created for download that contains one or more Excel CSV file(s). The file is available on the Manage Search Exports page from your user profile, or by selecting Manage Search Exports from the Export All dropdown on the search results page. The file is available until the Expiration Date designated for the export.

Resources

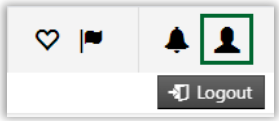
In addition to this Quick Reference Guide, there is an interactive video available as well as quick video snippets to help you as you navigate the new document search.

You also have a Guided Tour available through Bobcat*BUY*. When you navigate to one of the search pages you will see a pop-up.

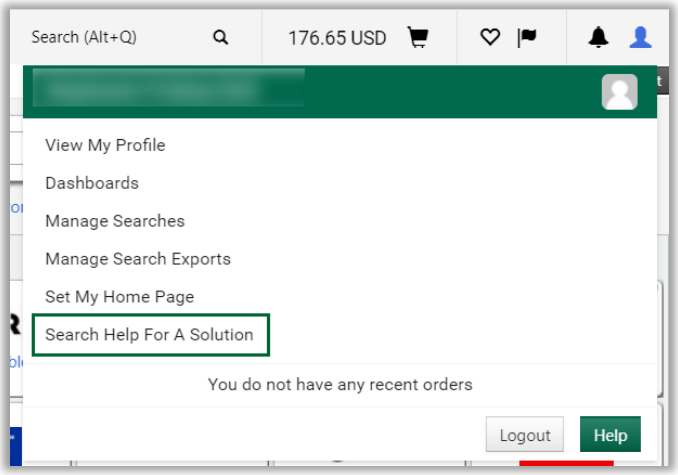


- Walk through a tour highlighting important features - Click **Yes** to allow a tour to walk you through the various features on the search page in a step-by-step manner. Click **No** to not display the tour.
- Show this again - **Yes** is selected by default. This allows the Step-by-Step Tour options to display on your screen each time you navigate to one of the new search pages. If **No** is selected, the option to view the Step-by-Step Tour will not display again.

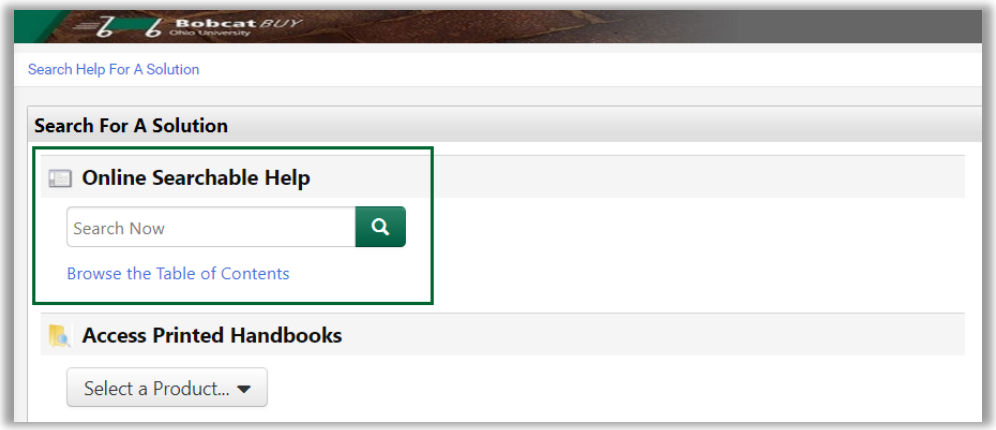
To acccess this information again, navigate to help in BobcatBUY by clicking on the User icon at the top left of the screen.



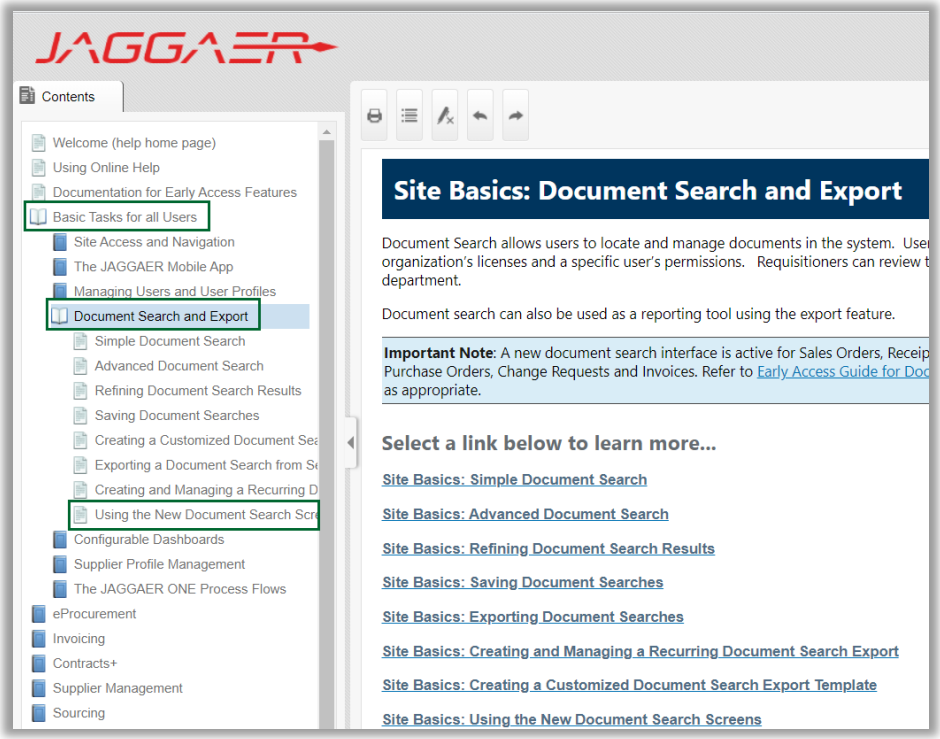
Click the Search Help for a Solution link to open help. Search for "Document Search



Select the Browse the Table of Contents link to search for the New Document Search Screens. You can also type "New Document Search Screens" directly into the Search Now search field.



When the search page appears, select Basic Tasks for all Users under the Contents tab on the left. Next select Document Search and Export then Using the New Document Search Screens.



Questions? Contact Finance Customer Care at financecustomercare@ohio.edu