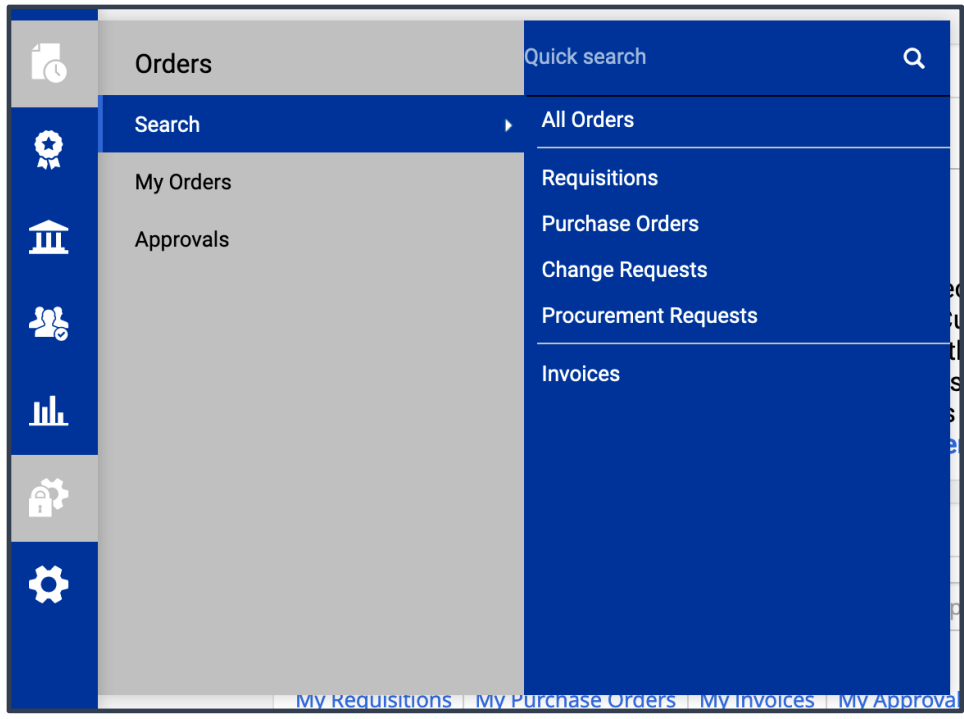


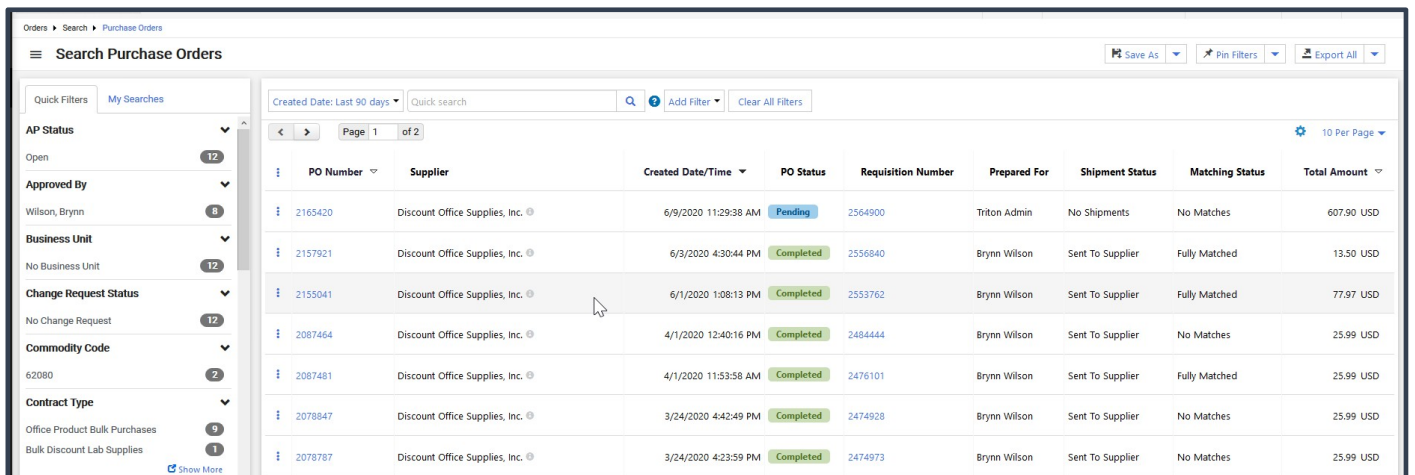
Performing a Search in the New Search Experience

As with the current search, you can perform a quick, "keyword" search or an advanced search using filters. The primary difference is how the filters are selected and managed. Additionally, in the new search, search results display on the search screen, where the current search takes you to a different screen.

Access the new search for various documents via the **Orders**  menu navigation:



When the option is selected search a document, results display by default for the last 90 days.

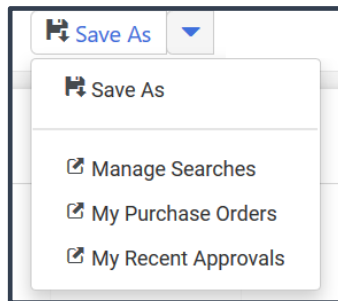


The screenshot displays the 'Search Purchase Orders' results page. The table shows the following data:

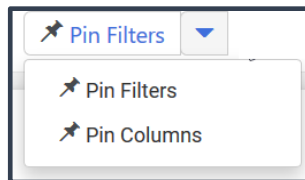
PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Prepared For	Shipment Status	Matching Status	Total Amount
2165420	Discount Office Supplies, Inc. ©	6/9/2020 11:29:38 AM	Pending	2564900	Triton Admin	No Shipments	No Matches	607.90 USD
2157921	Discount Office Supplies, Inc. ©	6/3/2020 4:30:44 PM	Completed	2556840	Brynn Wilson	Sent To Supplier	Fully Matched	13.50 USD
2155041	Discount Office Supplies, Inc. ©	6/1/2020 1:08:13 PM	Completed	2553762	Brynn Wilson	Sent To Supplier	Fully Matched	77.97 USD
2087464	Discount Office Supplies, Inc. ©	4/1/2020 12:40:16 PM	Completed	2484444	Brynn Wilson	Sent To Supplier	No Matches	25.99 USD
2087481	Discount Office Supplies, Inc. ©	4/1/2020 11:53:58 AM	Completed	2476101	Brynn Wilson	Sent To Supplier	Fully Matched	25.99 USD
2078847	Discount Office Supplies, Inc. ©	3/24/2020 4:42:49 PM	Completed	2474928	Brynn Wilson	Sent To Supplier	No Matches	25.99 USD
2078787	Discount Office Supplies, Inc. ©	3/24/2020 4:23:59 PM	Completed	2474973	Brynn Wilson	Sent To Supplier	No Matches	25.99 USD

Expand/Collapse button - Beside the **Search [Document]** header, select the  to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.

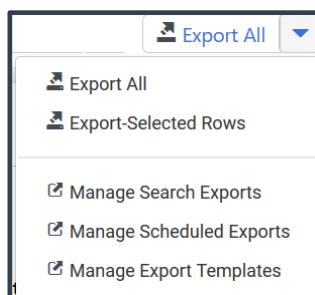
- **Quick Filters** - A panel for **Quick Filters** displays on the left beside the **My Searches** panel, making it easier to see the filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. The Quick Filter options will vary based on the document type, and also the filter options configured by your system administrator. You can continue also use the **Add Filter** dropdown to refine results, which will update the Quick Filters information.
- You can choose to manage searches and navigate to your own documents and approvals from the **My Searches** tab on the left. This is existing behavior. However, with this release, the **Save As** button dropdown now contains these options as well, so you do not have to expand the left panel to access them:
 - Manage Searches
 - My [Document type]
 - My Recent Approvals




- The **Pin Filters** button contains the options to **Pin Filters** and **Pin Columns**. This action is recommended when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.




- You can choose to **Export All** or **Export Selected Rows**, as well as manage search exports, scheduled exports, and export templates.



PERFORM A QUICK SEARCH

To learn more about **Quick Search** options, select the help icon  next to the search box.

1. Enter a keyword or phrase in the **Quick search** field.
2. Click the search icon . Matching documents are returned in the search results.

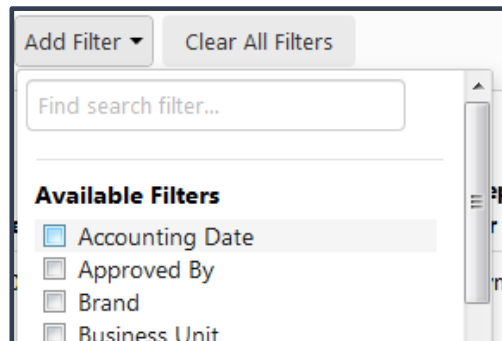
PERFORM AN ADVANCED SEARCH


Use the filter options to perform a more specific search.

1. To choose a different date range, click the **Created Date: Last 90 days** drop down button, and select a different date option.
2. Add filters by selecting from the **Add Filter** button next to the Quick Search box, or by selecting from the **Quick Filters** tab to the left of search results.


Using the Add Filter button

- a. Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays. **Note:** These filter options are the same options that displayed on the previous Advanced Search page.

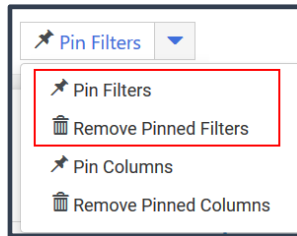


- b. You can search for a specific filter by entering a value in the field. The list of filters will be refined and only matching filters display.
- c. Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose **Business Unit**, an overlay displays from which you can select the appropriate business unit. **Important:** When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
- d. When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the  to remove the filter.
- e. Repeat the steps above to add additional filters. The search results update to reflect the new filters.

Using the Quick Filters Tab



- a. If necessary, click the Expand button  and select options from the **Quick Filters** on the left.

- Click the **Show more...** link to see additional values for a filter, if present.
- b. Search results are refined based on selection, and the selected filter option is listed above search results.
 - c. Click to remove the filter above search results, and/or continue to refine using the **Quick Filter** options.
3. **Best Practice!** If you would like to keep the filter configuration as the initial default search for all searches of this type going forward, select the **Pin Filters** button. Each time you return to the search page, the pinned filters will be applied by default. You can still add/remove filters. This only changes the initial search results filters applied when landing on the search results page.



4. To remove the pinned filters, select the **Remove Pinned Filters** option (only displays if you have pinned filters). **Note:** The Pin action only applies to the current search type. For example, if you pin filters for Purchase Order Search, they will apply on to the Purchase Order Search. You can pin different filters on different search pages



Sort Search Results

You can sort search results by any of the columns indicated with a sort icon . The column used for sorting is indicated in a circle .

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
2171401	Katak Products (Daffy)	6/14/2020 3:11:29 PM	Pending	2571220	Brynn Wilson	No Shipments	No Matches	24.00 USD
2165420	Discount Office Supplies, Inc.	6/9/2020 11:29:38 AM	Completed	2564900	Triton Admin	Sent To Supplier	No Matches	607.90 USD
2157921	Discount Office Supplies, Inc.	6/3/2020 4:30:44 PM	Completed	2556840	Brynn Wilson	Sent To Supplier	Fully Matched	13.50 USD

Configuring Search Results Columns

You have the ability to choose the columns that display in the search results and the order in which they display.


1. On the Search Results page, click the **Configure Columns** icon  located on the right, above the document list. The **Configure Column Display** screen displays. A list of all available columns displays on the left, and a list of selected columns displays on the right, where you can sort the order in which they display on the search results page.
2. To add or delete columns:
 - a. Add a column - locate the column(s) by scrolling through the list or entering a value in the search field. Click the checkbox for each column you would like to add from the available column list on the left. The columns are automatically added to the bottom of the selected columns list on the right. See the next step for information about sorting the list.
 - b. Delete a column, locate the column from the list on the right side, and click the . The

column is moved to the available columns list.

3. Manage column display order - Within the **Configure Column Display**, click and drag the columns to the selected location or use the **↑ ↓** to move the columns up and down.

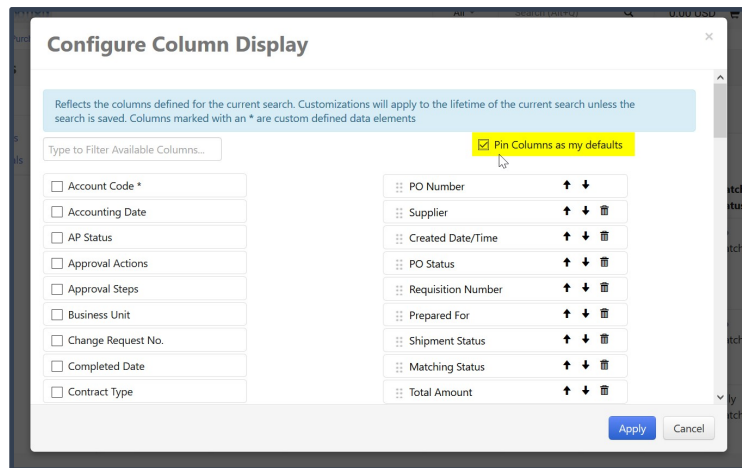
4. Manage the selected columnslist.

- ▮ To sort an item in the list, you can drag the columns to the selected location or use the **↑ ↓** to move the columns up and down.

- ▮ To delete a column from the selected list, click the .

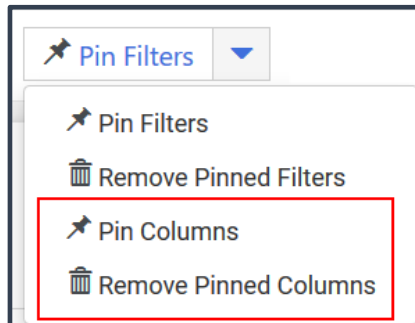
5. By default, the updated selected and sorted columns only display for the life of the current search.

Best Practice! If you would like to keep the column configuration for all searches of this type going forward, select the **Pin columns as my defaults** checkbox.



6. Click **Apply**.

7. You can also pin columns by selecting the **Pin Columns** option in the **Pin Filters** dropdown above search results. To remove the pinned columns, select the **Remove Pinned Columns** option (only displays if you have pinned columns). **Note:** The Pin action only applies to the current search type. For example, if you pin columns for Purchase Order Search, they will apply on to the Purchase Order Search. You can pin different columns on different search pages.

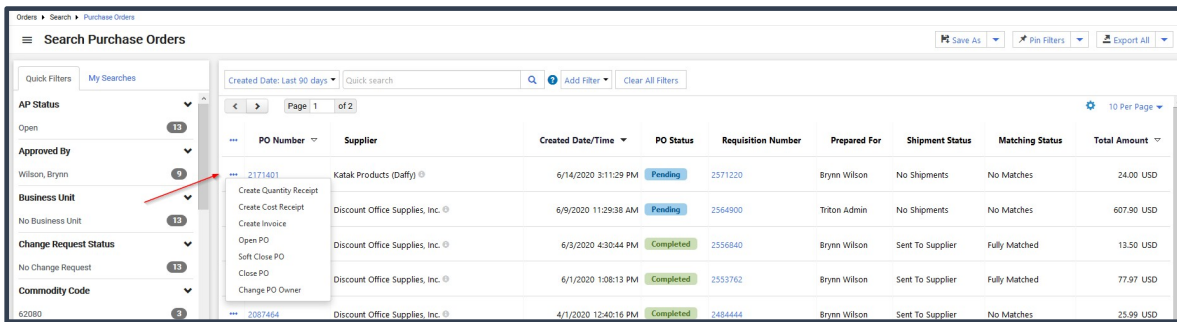


Take Action on Results

You can choose to take appropriate actions (per user permissions) for the document type using the action ellipses at the beginning of each search result or at the header row for multiple results. The actions for each document and process for completing those actions are unchanged from the previous search capabilities.

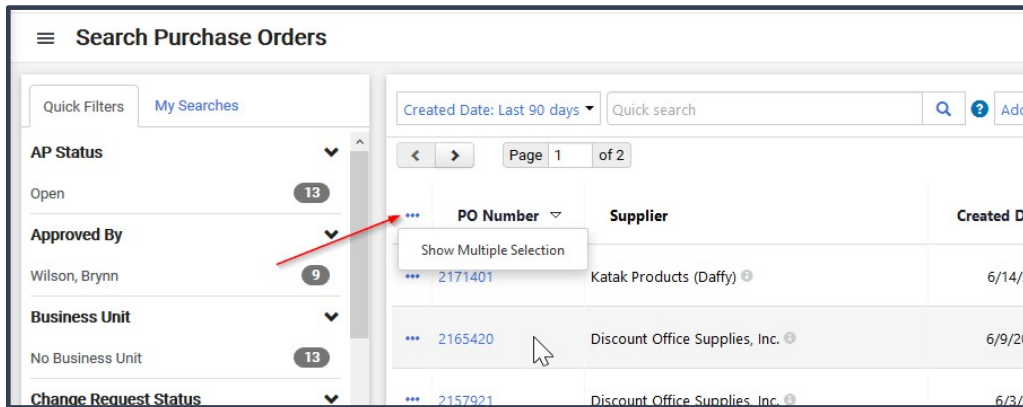
TAKING ACTION ON A SINGLE ROW

1. Click the ellipses at the beginning of the row. The appropriate actions for the document will display as hover text.
2. Select the appropriate option and follow the instructions.



TAKING ACTION ON MULTIPLE ROWS

1. Click the ellipses at the beginning of the header row.



2. Click **Show Multiple Selection**. Check boxes are now displayed in the header row and for each row.

<input type="checkbox"/>	PO Number	Supplier	Created Date/Time	PO Status
<input type="checkbox"/>	2171401	Katak Products (Daffy)	6/14/2020 3:11:29 PM	Pending
<input type="checkbox"/>	2165420	Discount Office Supplies, Inc.	6/9/2020 11:29:38 AM	Pending
<input type="checkbox"/>	2157921	Discount Office Supplies, Inc.	6/3/2020 4:30:44 PM	Completed
<input type="checkbox"/>	2155041	Discount Office Supplies, Inc.	6/1/2020 1:08:13 PM	Completed
<input type="checkbox"/>	2087464	Discount Office Supplies, Inc.	4/1/2020 12:40:16 PM	Completed

3. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
4. Once selections are made, click the ellipses in the header row again. The appropriate actions for the document will display as hover text.

<input type="checkbox"/>	PO Number	Supplier	Created Date/Time	PO Status	Rec
<input type="checkbox"/>	2171401	Katak Products (Daffy)	6/14/2020 3:11:29 PM	Pending	25712
<input type="checkbox"/>	2165420	Discount Office Supplies, Inc.	6/9/2020 11:29:38 AM	Pending	25649
<input type="checkbox"/>	2157921	Discount Office Supplies, Inc.	6/3/2020 4:30:44 PM	Completed	25568
<input type="checkbox"/>	2155041	Discount Office Supplies, Inc.	6/1/2020 1:08:13 PM	Completed	25537
<input type="checkbox"/>	2087464	Discount Office Supplies, Inc.	4/1/2020 12:40:16 PM	Completed	24844

5. Select the appropriate option and follow the instructions.

Export 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.

Manage Export Requests								
Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Widget orders	Completed	Sales Order	Full Export (CSV)	7/8/2019 5:46:15 PM	7/8/2019 5:46:23 PM	7/15/2019	Total Records: 4	Delete
Export request for Sales Order	Error	Sales Order	Full Export (CSV)	7/7/2019 9:18:38 PM	-	7/14/2019		Delete

The list of export files includes:

- | **Title** – the title assigned when the export was created. Select to open or download.
- | **Status** – indicates the current status of the export. Click **Refresh this Page** to see updated status.
- | **Search Type** - indicates the document type of the export.
- | **Requester** – the username of the requester (shown only if Show Company Exports was selected). Select the user's name to see their email address.
- | **Export Output** – the type of export (Screen, Transaction, Full).
- | **Created** – the date/time the export was requested.
- | **Completed** - the date/time the export was completed.
- | **Available Until** – the date the export will expire.
- | **Details** – indicates how many records are contained in the file.
- | **Actions** – a **Delete** button is available for completed exports. When selected, the export file is removed from the list and no longer available.

REQUEST EXPORT TEMPLATE TYPES

- | **Screen Exports:** Screen exports will export the search results exactly as they appear on the results screen with no additional data.
- | **Transaction Exports:** Transaction exports will export all information available about the transaction associated with each document.
- | **Full Exports:** Full exports will export all information available about the transaction associated with each document. Full exports also include document history such as approvals, comments and more.

Exporting from Search Results

When viewing search results, you can choose to **Export All** or **Export Selected** results.

1. Perform a document search. Search results display.
2. To export all results in the result set, click the **Export All** button. **Proceed to Step 4.**
3. To export selected results only:
 - a. Select the ellipses in the header row to reveal the multi select boxes for each row (explained above).
 - b. Select the appropriate results.
 - c. Click the Export All dropdown, and choose **Export Selected**.
4. Enter a **Title** for the export, up to 100 characters. A default Title is provided. Select a **Type** of export -

Screen Layout, Transaction, or Full.

5. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

Exporting Results from a Saved Search

When you export a saved search, dates will be relative to the time you request the export vs. the date you saved the search. For example, if you select to export a saved search that searches for the last 30 days, it will return results dated 30 days from the date of the export.

This task assumes you have a saved search.

1. Navigate to **Manage Searches** page (**User Profile > Manage Searches** or select the **Manage Searches** link on the search results page) and locate the search you would like to export.
2. Select the **Export** button.
3. Enter a **Title** for the export. You may also enter a Description, but one is not required.
4. Select a **Type** of export - Screen Layout, Transaction, or Full.
5. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

Downloading Search Exports

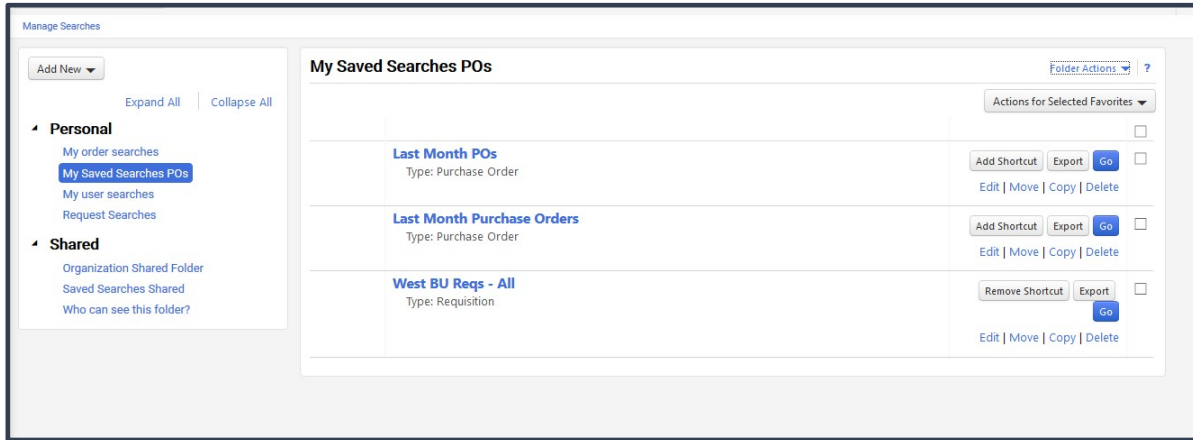
1. Navigate to **Manage Search Exports** page (**User Profile > Manage Search Exports** or select the **Manage Search Exports** option from the **Export All** dropdown on the search results page).
2. If there are several exports you may want to filter them to locate the export you want to download. Select **Click to filter** link.
 - a. **Search Type** – Select to filter exports by type of export. The default is All.
 - b. **Status** - Select to filter exports by status. The default is All.
 - c. **Show Company Exports** – By default, only your requested exports are shown. Select Yes to see all exports requested by all users in your organization. If you have permission only to view your own exports, this check box will not be available.
3. Click the **Title** for the export you want to download or open. Select to **Open** or **Save** the file.
4. When you have downloaded the file, you can choose to remove it from the exports. Select the **Delete** button under the Action column for the appropriate export file.

Saving Searches

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. It is important to note that when you execute a saved search the dates will be relative, meaning the last 30 days would be from the date of report execution instead of the date that the report was saved.

Saved searches are organized in folders. You may create your own personal folder(s) to store various searches. With the appropriate permission, you may create shared folders to save searches so that other

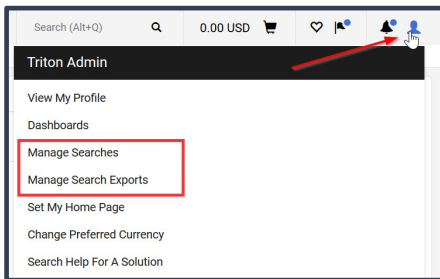
users may access those searches.



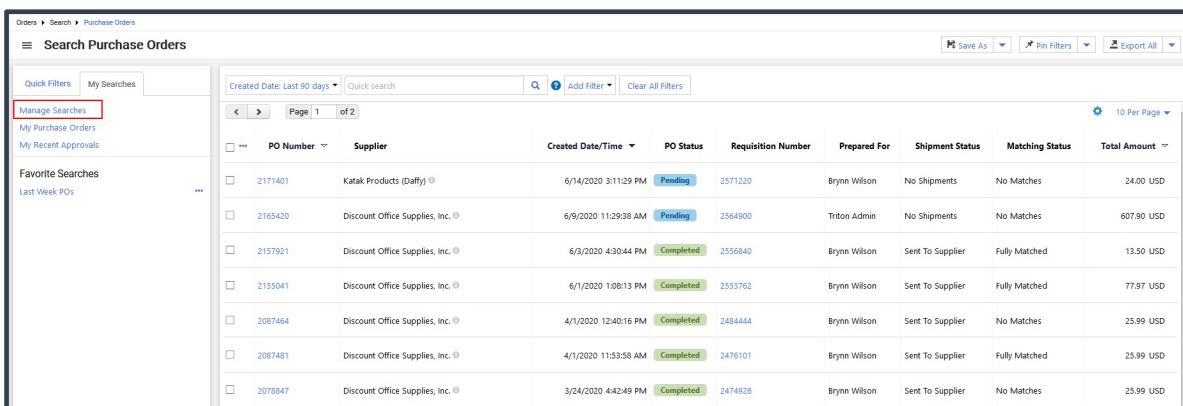
Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. When viewing saved search results, you can add filters to modify results, and save the existing search or save the updated criteria as a new saved search

Accessing Saved Searches

The **Manage Searches** page provides a **global** view of **all saved searches** for your organization. It is available under the user profile dropdown option or from the Manage Searches link on the search pages.



or



Create a Saved Search Folder

You can create a Saved Search folder from the **Manage Searches** page and also at the time you save a search. You will be presented with the option to create a new folder. If you choose to do so, you can follow the same steps as below.

1. Navigate to **Manage Searches** or a **Saved Searches** page.
2. Select the **Add New** button in the top left.
3. Select the type of folder you would like to create;
 - a. **Top level personal folder** – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
 - b. **Top level shared folder** – this will create a new top level folder that is accessible to your organization.
 - c. **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected. This option will not be available if there is no folder selected.
4. Enter a name and description for the folder.
5. Select **Save**. A new folder will be added to the area you selected.

Create and Manage Saved Searches

Create a Saved Search

1. Perform a search using the desired search criteria.
2. Select **Save As** from the dropdown options at the top of the page.
3. Enter a **Nickname** for the search. This field is required.
4. Select a folder in which to save the search, or create a new folder.
5. Click **Save**. The search will be saved in the selected folder.

Edit saved search criteria and save or save as new

1. Navigate to **Manage Searches** or a **Saved Searches** page. Locate the appropriate search. Click the search name to view results.
2. When viewing the search results for the saved search, the saved search name appears at the top. Select additional criteria to further filter results. A (Modified) indication displays next to the saved search name.
3. Click the **Save Changes** drop-down button to see options:
 - a. Select **Save Changes** if you want to save the existing saved search with the updated criteria. You will be asked to confirm your selection. Select **Yes** to save the search with the updated criteria. Select **No** to keep the existing search criteria.
 - b. Select **Save As** to save the criteria as a new search. Follow the directions as indicated for **Create a New Saved Search**. The original saved search you selected will be unchanged.
 - c. Select **Discard Changes** to remove additional filters applied since the last save.

Edit a Saved Search Name and Description

1. Navigate to **Manage Searches** or a **Saved Searches** page. Locate the appropriate search.
2. Select the **Edit** link for the search you want to edit.
3. Make the desired changes to the name and/or Description and select **Save**. The changes will be applied to the saved search.
4. To edit the name and description of multiple saved searches, select the checkboxes to the right of the appropriate searches then select the **Edit** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then change the information for all of the selected searches.

Move or Copy a Saved Search

1. Navigate to **Manage Searches** or a **Saved Searches** page.
2. To **move** a saved search from one folder to another:
 - a. Select the **Move** hyperlink for the appropriate search.
 - b. In the **Move Favorites** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.
 - c. Select an existing **Destination Folder**, or select to **Add New**.
 - d. Select **Save Changes**.
3. To **copy** a saved search to another folder, while leaving it in the current folder:
 - a. Select the **Copy** link for the appropriate search.
 - b. In the **Copy Favorites** overlay, the search(es) you want to move are displayed as **Selected Items**, and the **Current Folder** is listed.
 - c. Select an existing **Destination Folder**, or select to **Add New**.
 - d. Select **Save Changes**.
4. To move or copy multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then select **Move** or **Copy** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. You can then perform the action for all of the selected searches

Delete a Saved Search

1. Navigate to **Manage Searches** or a **Saved Searches** page.
2. Select the **Delete** link for the appropriate search. (Note that this is different than the Delete button available for folders)
3. An overlay displays. Click **Yes** to confirm you want to delete the search.
4. To delete multiple saved searches select the checkboxes to the right of the appropriate searches then select **Delete** from the **Actions for Selected Favorites** drop-down at the top of the listed searches. All selected searches will be deleted.

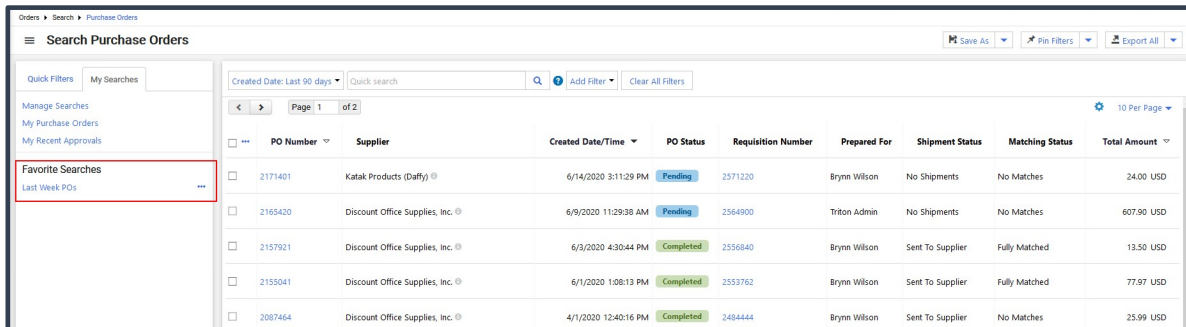
Execute a Saved Search

Select to see documents based on the criteria provided in a saved search.


1. Navigate to **Manage Searches** or a **Saved Searches** page. Locate the search you would like to execute.
2. Select the Saved Search name or the **Go** button.
3. Your search will be executed and you can view results based on the criteria in the saved search.

Saved Search Favorites

You can select to **Add Shortcut** for a saved search so it will show as a **Favorite** on a search results page.



PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Prepared For	Shipment Status	Matching Status	Total Amount
2171401	Katak Products (Dafly)	6/14/2020 3:11:29 PM	Pending	2571220	Brynn Wilson	No Shipments	No Matches	24.00 USD
2165420	Discount Office Supplies, Inc.	6/9/2020 11:29:38 AM	Pending	2564900	Triton Admin	No Shipments	No Matches	607.90 USD
2157921	Discount Office Supplies, Inc.	6/3/2020 4:30:44 PM	Completed	2556840	Brynn Wilson	Sent To Supplier	Fully Matched	13.50 USD
2155041	Discount Office Supplies, Inc.	6/1/2020 1:08:13 PM	Completed	2553762	Brynn Wilson	Sent To Supplier	Fully Matched	77.97 USD
2087464	Discount Office Supplies, Inc.	4/1/2020 12:40:16 PM	Completed	2484444	Brynn Wilson	Sent To Supplier	No Matches	25.99 USD

1. Navigate to **Manage Searches** or a **Saved Searches** page. Locate the search you would like to make a Favorite.
2. Select the **Add Shortcut** button. This will add a shortcut as a Favorite to run from the main search page.
3. Navigate to the search results page, and notice the **Favorite Searches** listed on the left side.
4. To run a saved search from the shortcut, select the saved search link name.
5. To run an export of a saved search, select the **export** link.
6. To remove the saved search as a favorite (shortcut):
 - a. From the search results page, select the action icon () and click **Remove Shortcut**.
 - b. From the Saved Searches or Manage Searches page, click **Remove Shortcut** for the appropriate saved search.