

Using Document Search

1. If you'd like to find a certain document, you can use the Document Search in ShopBlue. Start first by clicking "Search Documents" in the Documents fly-out menu on the left side of your homepage (Figure 1).

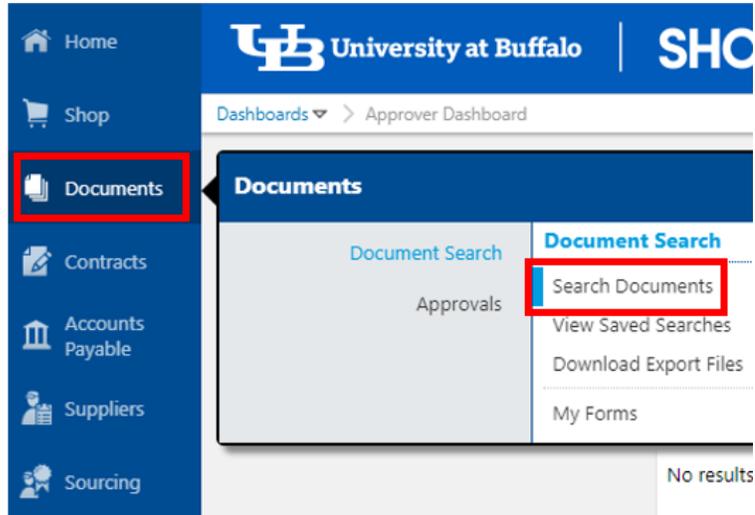


Figure 1

2. Next, select the type of documents you are searching for from the left dropdown, and select the range of dates, or enter a custom range of dates in the right dropdown. Now, you can enter your search term (PO number, supplier name, etc.) (Figure 2).

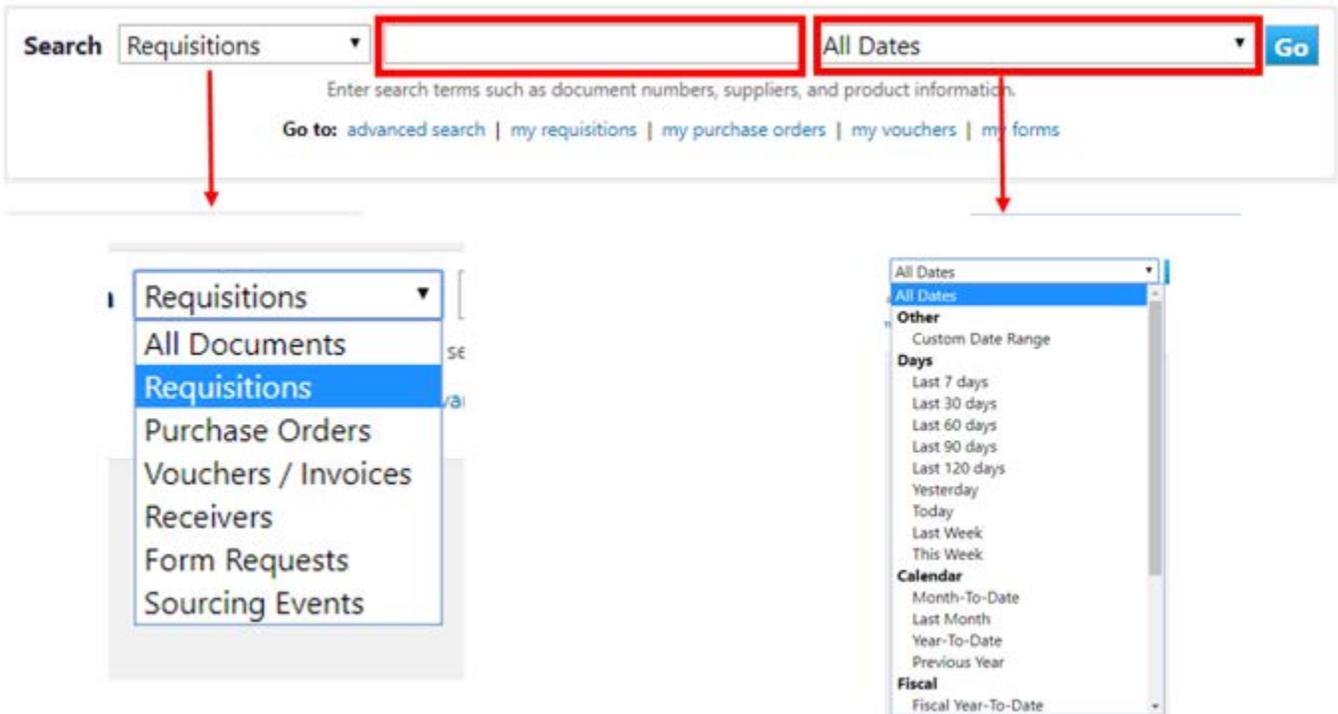


Figure 2

- Next, click on the “PO No” you wish to view (this search was for Purchase Orders from Corr Distributors over the last 90 days) (Figure 3). You can refine your search results by using any of the filters on the side of your screen by clicking on the filter icon.

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
✓ 1149142	Corr Distributors Incorporated	11/12/2018 3:26 PM	2462583	DALTON HOLLER	Sent	Fully Received No Matches	27.70 USD
✓ 1149141	Corr Distributors Incorporated	11/12/2018 3:17 PM	2462542	MICHELLE JOHNSON	Sent	Fully Received No Matches	26.45 USD
✓ 0006855	Corr Distributors Incorporated	11/12/2018 2:11 PM	2462496	DALTON HOLLER	Sent	Fully Received No Matches	23.62 USD
✓ 0006825	Corr Distributors Incorporated	11/12/2018 1:53 PM	2462501	DALTON HOLLER	Sent	Fully Received No Matches	25.16 USD
✓ 0006495	Corr Distributors Incorporated	11/5/2018 11:07 AM	2454494	JORDANANN WILSON	Sent	Fully Received No Matches	24.20 USD
✓ 1000049	Corr Distributors Incorporated	10/31/2018 11:05 AM	2448322	Chris Bordeaux		Fully Invoiced No Matches	1.00 USD
✓ 0006235	Corr Distributors Incorporated	10/26/2018 1:10 PM	2441026	Eric Fawcett	Sent	Fully Received Fully Invoiced Fully Matched	23.04 USD
R205977	Corr Distributors Incorporated	10/25/2018 1:09 PM	2273696	JordanAnn Wilson		No Matches	1,111.00 USD
✓ 0006205	Corr Distributors Incorporated	10/25/2018 12:32 PM	2279743	BRIAN MCGINTY	Sent	Closed Fully Received Fully Invoiced Fully Matched	100,000.00 USD
R205971	Corr Distributors Incorporated	10/25/2018 10:07 AM	2398927	MICHELLE JOHNSON		No Matches	10,000.00 USD
✓ 0005895	Corr Distributors Incorporated	10/10/2018 8:23 AM	2421472	Requester Maute	Sent	Partially Received No Matches With Returns	107.57 USD
✓ 0005445	Corr Distributors Incorporated	10/1/2018 10:49 AM	2270632	AUSON MEADOWS	Sent	No Matches	5,000.00 USD
R205865	Corr Distributors Incorporated	10/1/2018 10:46 AM	2308196	MICHELLE JOHNSON		No Matches	2,200.00 USD
✓ 0005435	Corr Distributors Incorporated	10/1/2018 10:46 AM	2397834	MICHAEL O'HARE	Sent	Partially Received No Matches	9,848.10 USD

Figure 3

Advanced Search

The Advanced Search is also a very useful tool. The Advanced search allows you to search by a particular user, supplier, specific date range, one or more chart fields, dollar amount, commodity code, etc. In the following example, we will, once again, start by going to “Search Documents” in the Documents fly-out, then clicking “advanced search” (Figures 4 and 5).

Figure 4

Figure 5

SHOPBLUE

Next, for the following example, we will search for all Purchase Orders prepared by Dalton Holler over the Last 60 days, then click Search at the bottom of the page (Figure 6).

The screenshot shows the ShopBlue search interface. At the top, the search type is set to 'Purchase Orders'. The 'Purchase Order Information' section includes fields for 'Purchase Order Number(s)', 'Participant(s)', 'Owner', 'Prepared By', 'Approved By', 'Date', 'Total Amount', 'Supplier', 'Department', and 'Campus'. The 'Creation Date (System)' dropdown is open, showing options like 'All Dates', 'Other', 'Custom Date Range', 'Days', 'Calendar', and 'Fiscal'. The 'Last 60 days' option is selected. The 'User Search' section includes fields for 'Last Name', 'First Name', 'User Name', 'Email', 'Campus', 'Department', 'Role', and 'Status'. The 'Last Name' field contains 'Holler' and the 'First Name' field contains 'Dalton'. A 'Search' button is highlighted with a red box and an arrow pointing to it. Below the search form is a 'Prepared By' field with an 'Add Selected Users' button.

Figure 6

Add the user your wish to search by (Figure 7).

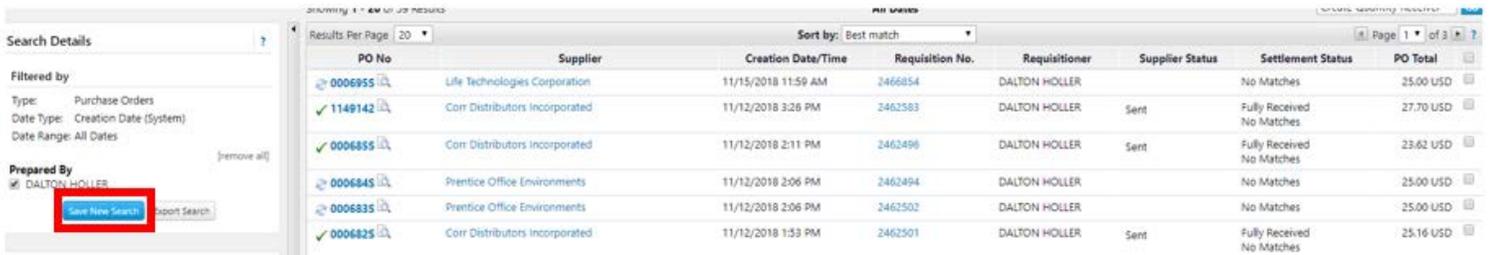
The screenshot shows the ShopBlue search interface. The 'Prepared By' field is populated with 'DALTON HOLLER'. The 'Add Selected Users' button is highlighted with a red box. Below the search form is a 'Search For Another User' button and a table of search results.

Name ▲	User Name ▲	Email ▲	Phone	Status	Action
HOLLER, DALTON	daltonho	daltonho@buffalo.edu	+1 716-645-4547	Active	[select]

Figure 7

Save Searches as Favorites

Continuing from the example, click the Save New Search button on your results screen (Figure 8).

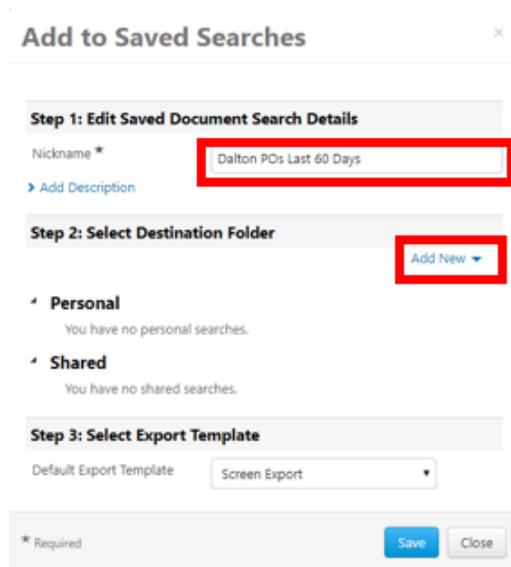


The screenshot shows a search results page with a table of purchase orders. The 'Save New Search' button is highlighted with a red box. The table has the following columns: PO No, Supplier, Creation Date/Time, Requisition No., Requisitioner, Supplier Status, Settlement Status, and PO Total.

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
0006955	Life Technologies Corporation	11/15/2018 11:59 AM	2466854	DALTON HOLLER		No Matches	25.00 USD
1149142	Corr Distributors Incorporated	11/12/2018 3:28 PM	2462583	DALTON HOLLER	Sent	Fully Received No Matches	27.70 USD
0006855	Corr Distributors Incorporated	11/12/2018 2:11 PM	2462496	DALTON HOLLER	Sent	Fully Received No Matches	23.62 USD
0006845	Prentice Office Environments	11/12/2018 2:06 PM	2462494	DALTON HOLLER		No Matches	25.00 USD
0006835	Prentice Office Environments	11/12/2018 2:06 PM	2462502	DALTON HOLLER		No Matches	25.00 USD
0006825	Corr Distributors Incorporated	11/12/2018 1:53 PM	2462501	DALTON HOLLER	Sent	Fully Received No Matches	25.16 USD

Figure 8

Give your Search a name and add a description (Figure 9). **Note:** If you do not have a folder under your Personal Favorites, you will need to create one by clicking Add New.



The screenshot shows the 'Add to Saved Searches' dialog box. It has three steps: Step 1: Edit Saved Document Search Details, Step 2: Select Destination Folder, and Step 3: Select Export Template. The 'Nickname' field is highlighted with a red box and contains the text 'Dalton POs Last 60 Days'. The 'Add New' button is also highlighted with a red box.

Step 1: Edit Saved Document Search Details

Nickname *

> Add Description

Step 2: Select Destination Folder

Personal
You have no personal searches.

Shared
You have no shared searches.

Step 3: Select Export Template

Default Export Template

* Required

Figure 9

SHOPBLUE

Create a Personal Folder for your saved searches (Figure 10).

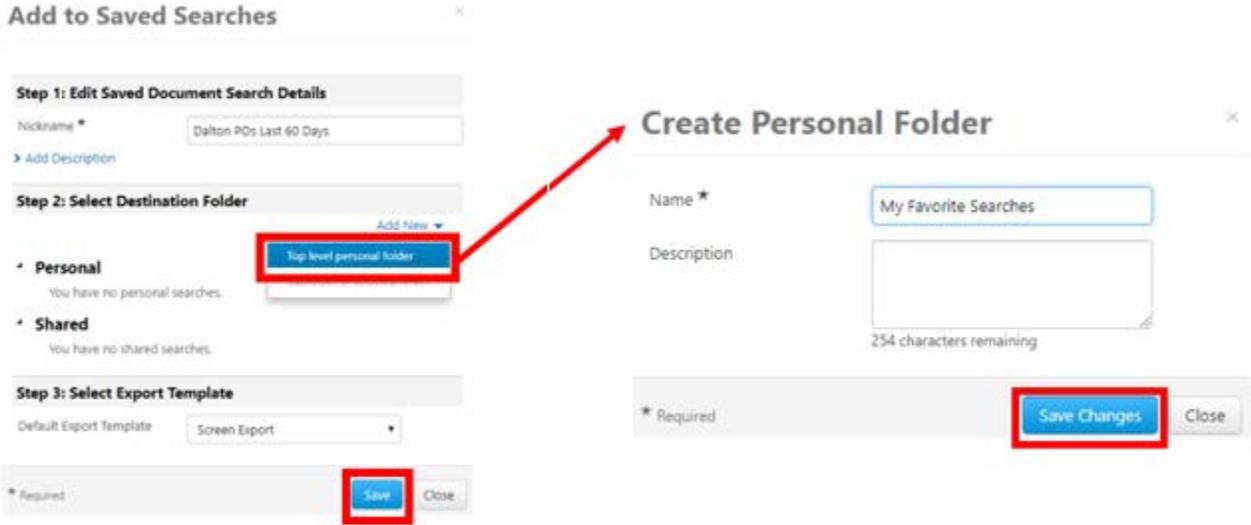


Figure 10

Save the search to your Saved Searches (Figure 11).

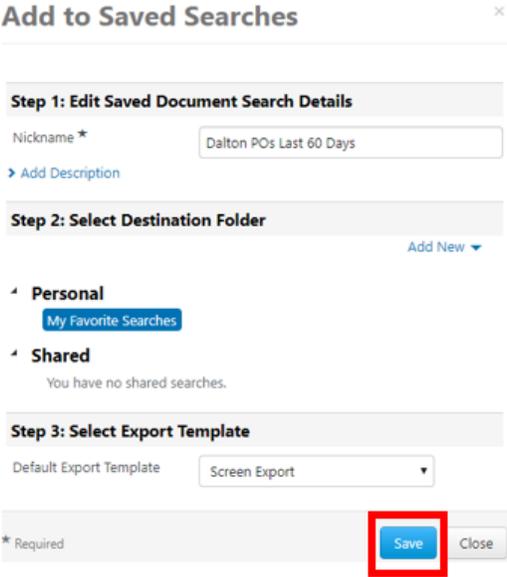


Figure 11

Retrieve a Saved Search

Click “Search Documents” from the Documents fly-out (Figure 12).

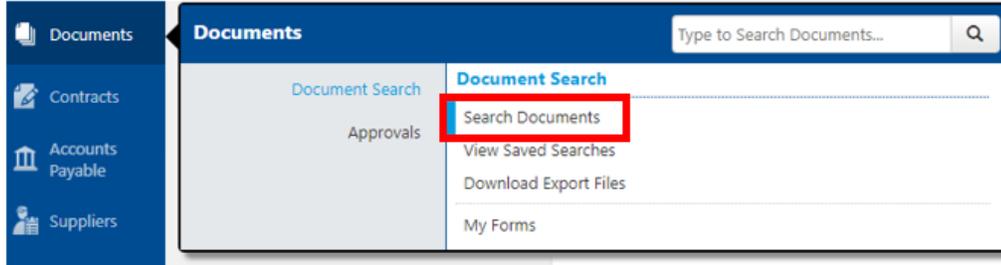


Figure 12

From the breadcrumb trail, click the “Search Documents” dropdown, and select “View Saved Searches” (Figure 13).

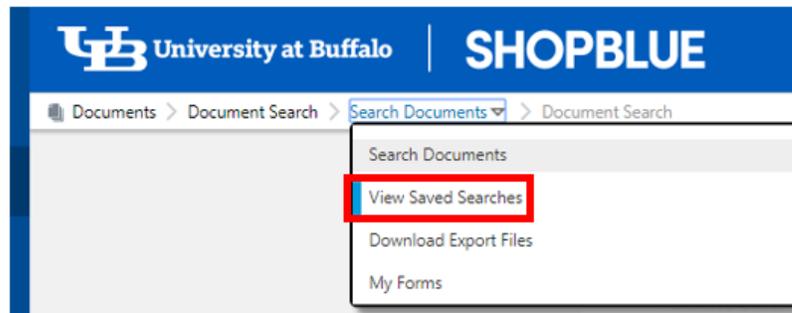


Figure 13

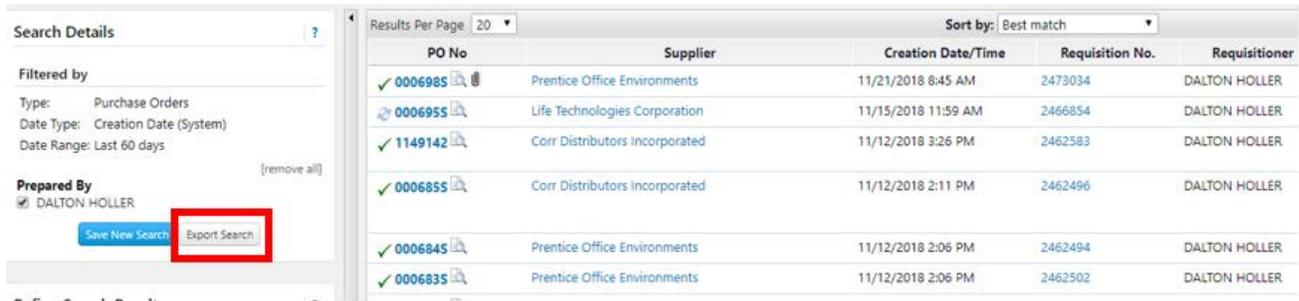
Click on your saved folder in “Personal”, and click “Go” (Figure 14).



Figure 14

Export a Search to Microsoft Excel

For this example, in order to export your POs from the last 60 days, first, follow the instructions from the Advanced Search section to view POs from the last 60 days (Figure 15).



Search Details

Filtered by

Type: Purchase Orders
Date Type: Creation Date (System)
Date Range: Last 60 days [remove all]

Prepared By
DALTON HOLLER

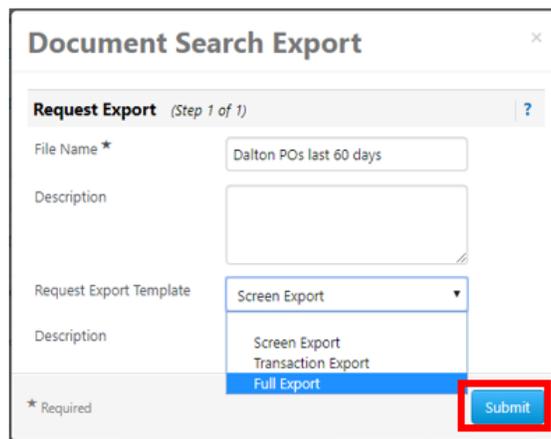
Save New Search Export Search

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner
000698S	Prentice Office Environments	11/21/2018 8:45 AM	2473034	DALTON HOLLER
000695S	Life Technologies Corporation	11/15/2018 11:59 AM	2466854	DALTON HOLLER
114914Z	Corr Distributors Incorporated	11/12/2018 3:26 PM	2462583	DALTON HOLLER
000685S	Corr Distributors Incorporated	11/12/2018 2:11 PM	2462496	DALTON HOLLER
000684S	Prentice Office Environments	11/12/2018 2:06 PM	2462494	DALTON HOLLER
000683S	Prentice Office Environments	11/12/2018 2:06 PM	2462502	DALTON HOLLER

Figure 15

Give your export a name and choose the type of Export Template (Figure 16):

- **Screen Export** – exports only the information available in the search results screen for each document.
- **Transaction Export** – exports an expanded set of information on the documents.
- **Full Export** – exports transactions with history.



Document Search Export

Request Export (Step 1 of 1)

File Name * Dalton POs last 60 days

Description

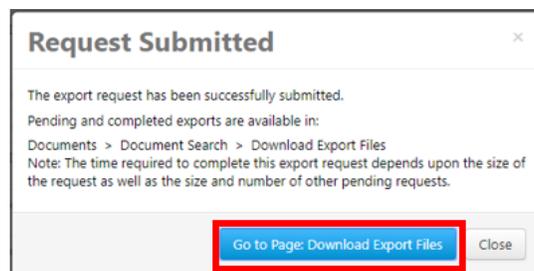
Request Export Template Screen Export

Description Screen Export
Transaction Export
Full Export

* Required Submit

Figure 16

Next, click **Go to Page: Download Export Files** (Figure 17):



Request Submitted

The export request has been successfully submitted.
Pending and completed exports are available in:
Documents > Document Search > Download Export Files
Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

Go to Page: Download Export Files Close

Figure 17

SHOPBLUE

Click on the File Name, and choose which of the exported search results you wish to view (Figures 18 and 19).

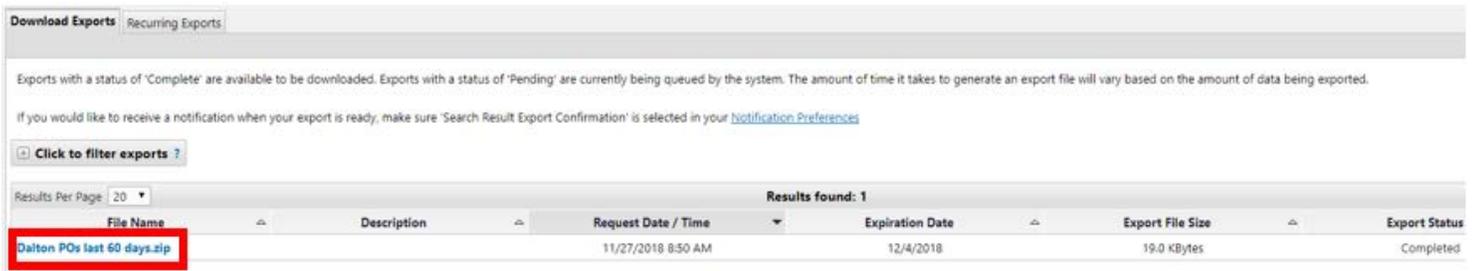


Figure 18

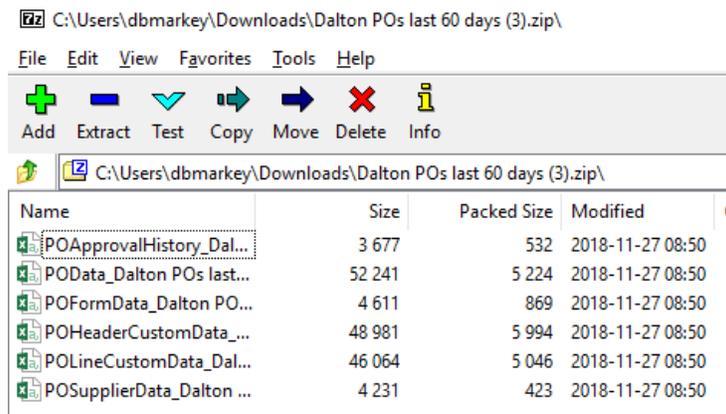


Figure 19