Document Search at a glance

Document Search provides end users, approvers, AP staff, and administrators a way to quickly locate purchasing documents in eBuy. The purpose of this quick guide is to:

- Provide an overview of Document Search and how it is used

Introduction to Document Search

On March 26th, a new way to find documents in eBuy will be introduced. This new functionality, which is named Document Search, will replace the current History search functionality.

Efficiency Improvements! The behind the scenes processes uses for Document Search are different than those used with History Search. Because of this, Document Search will allow users to experience a more efficient search process. Users will not notice a lag time when they are running searches and exports at the same time as other users within their organization. Because of the type of search logic that is in place users are free to run searches simultaneously with other users and as often as they like.

What are documents? In eBuy, document is a term used to describe the different purchasing entities. Prior to electronic systems, these entities typically represented a separate piece of paper, or document. Documents include Requisitions (PR), Purchase Orders (PO), and Invoices.

The document types available for searching are dependent on the user’s permissions. For example, if an organization does not invoice in eBuy, they will not be allowed to search for invoices. If a user does not have permission to view purchase orders, then the user will not see that as an option.
Using Document Search

There are two ways to use Document Search: Simple Search and Advanced Search (similar concepts to product search options).

For Simple Search there are three main selections. These include:

- What type of documents do you want to search? Select to search on a specific document type (Requisition, Purchase Order, or Invoice) or ALL documents. The default is to search across all documents.
- What are you looking for? The following information can be entered in the search box: Requisition Number, Purchase Order Number, Invoice Number, Supplier Invoice Number, Catalog Number, Requisition Name, Supplier Name, Username, First Name, Last Name, Email Address, Commodity Code, Product Description, Form Name, Manufacturer Name.
- What dates do you care about? Users can now select from relative date ranges for the query. They can choose by number of days, calendar span, fiscal year, or other, which allows custom date ranges. Examples of relative ranges include last 30 days, last 60 days, Last Year, etc.

Advanced Search offers users the option to enter very specific, detailed search criteria. Advanced search offers users the ability to pre-define your search criteria. You can perform an advanced search across multiple documents or select a specific document type. Users should use advance search when they know up front the criteria they are looking for. (For example: 1-All Pending Requisitions for Supplier X submitted within the last 30 Days. 2-All past Requisitions for Product X from Supplier X in the last 120 Days. 3-All Requisitions against Account 0101111 UP 10010 for the Date Range Jul 1, 20XX through June 30, 20XX.)

Important Features of Document Search:

- Relative Date Ranges are available when performing a document search. After the search results display, you can filter your search results by a different date range. Date range selection can happen four different ways:
  1. Day: Last 7 days, Last 30 days, Last 60 days, Last 90 days, Last 120 days, Yesterday, Today, Last Week, This Week.
  2. Calendar: Month To Date, Last Month, Year To Date, Previous Year.
3. **Fiscal**: Year To Date, Previous Year. This will look at the fiscal year settings on the individual org. It will take the starting month of your fiscal year and use that to calculate the date ranges for Fiscal.

4. **Other**: All Dates, Custom Date.

*Filter Options after performing your initial document search*: With Document Search, 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 PRs, you can narrow your results by a specific Supplier or Catalog Number…Account Code or Cost Center. 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.

*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 PRs for the last 7 days, it will show exactly that, no matter what date it is executed. Saved searches are accessed through the Document Search tab, and are saved by name and description. This gives them the ability to run it at anytime and get their data. Saved searches now look very similar to favorites. Users may create their own folders to organize and manage their saved searches. For example, a user may want to create a folder for their PO and PR Searches, and another folder for the Invoice Searches (If they have permission to see POs and Invoices).

*Searching by Custom Fields*. Users can search by custom fields (account codes, etc). Searching across documents by custom fields is available as part of the advanced search. Organizations can choose what, if any, custom fields are searchable. Additionally, users can now choose a span of values or a “starts with” option for custom fields.

*Exporting Search Results*: As with History, data exports are available after a search is performed. The user is provided the same options as with History: transaction export, screen export, or full export. If the user has performed an all documents search, they can now export those search results. The all documents search will be a SCREEN export only but will contain all document types in a single file. The export button is located within the selected filters section of your search results.