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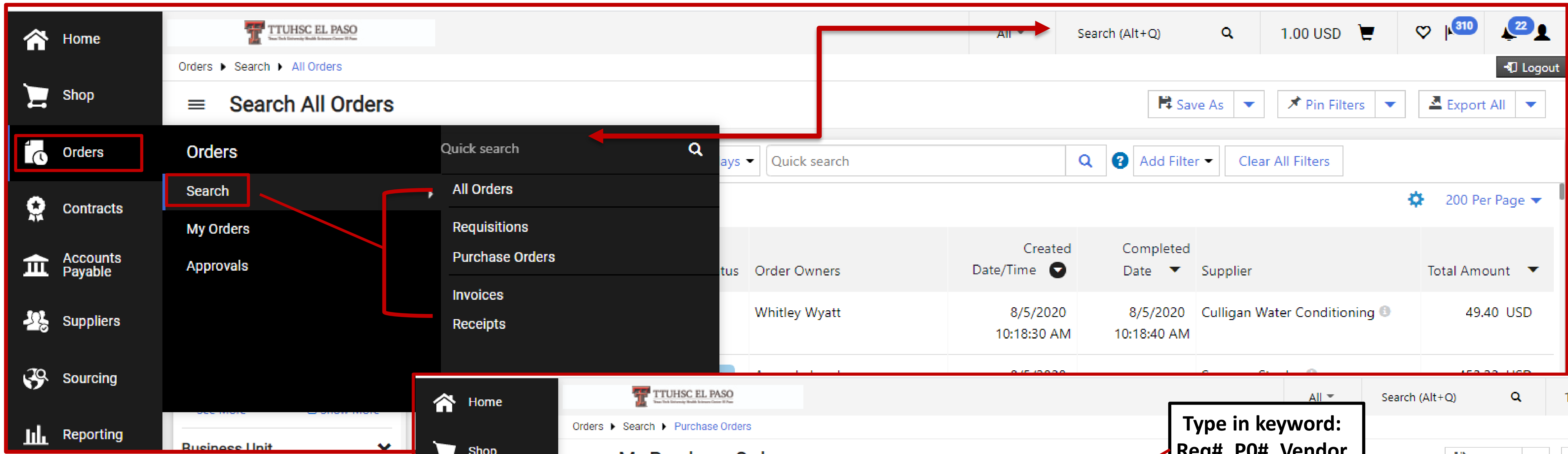
TechBuy Guidelines for Users Performing Searches in the New Search Experience

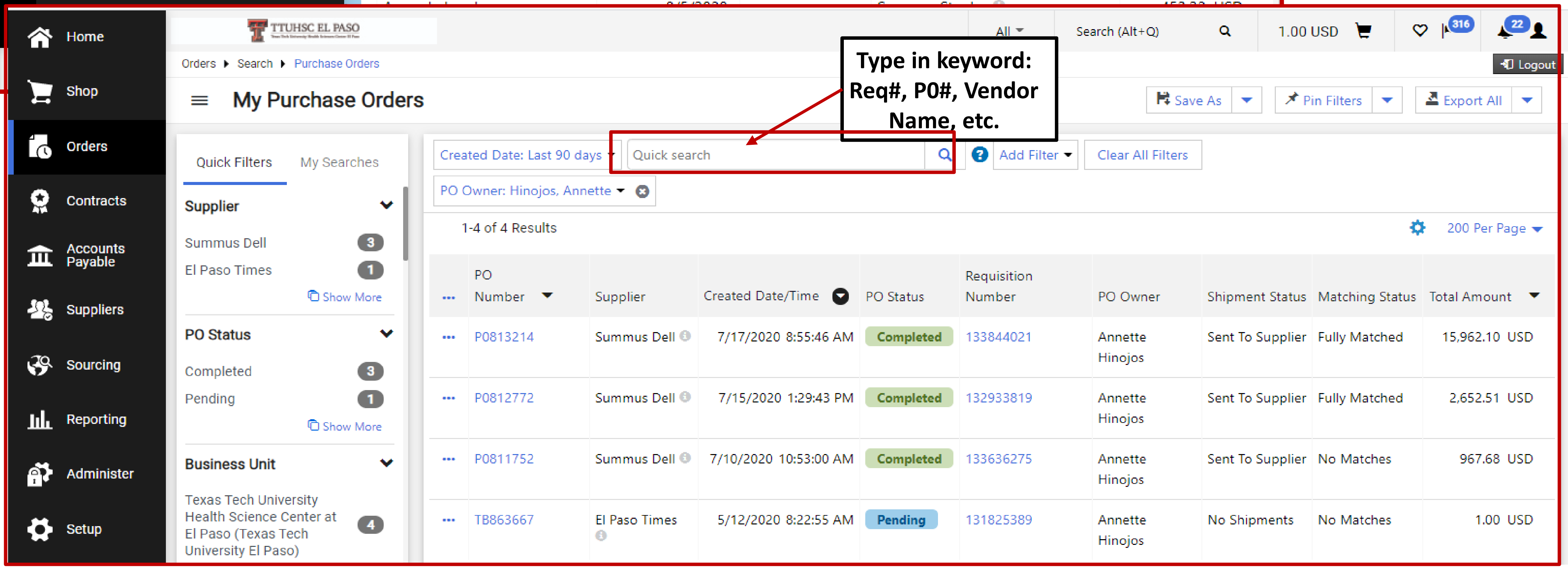
The following guideline is intended to provide assistance for TechBuy users performing searches in the New Search Experience, which has replaced the Classic Experience in TechBuy.

Performing a Quick Search from the Home Screen

From the Home screen > Orders > Search > Requisitions, Purchase Orders, Invoices, or Receipts:

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





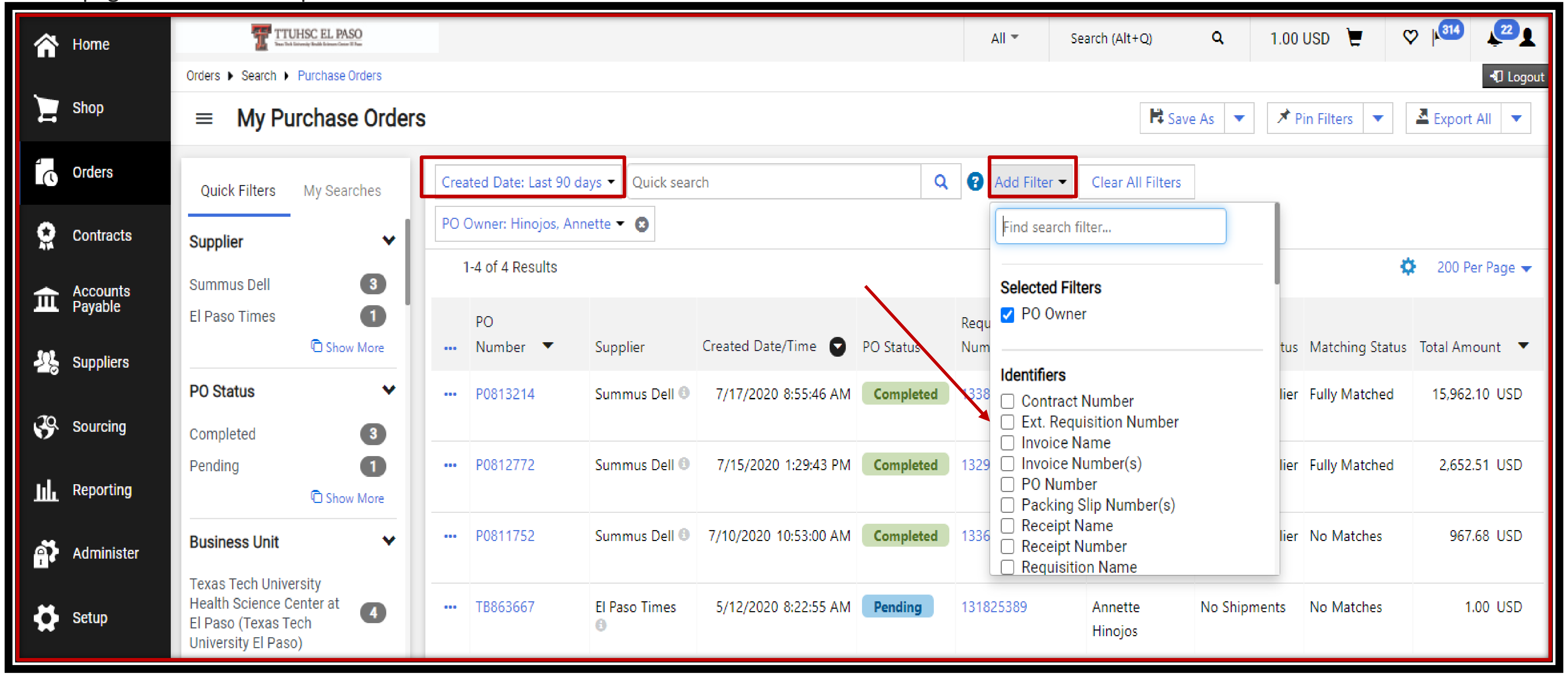
Performing a Quick Search from My Searches

- ❖ Enter a keyword or phrase in the **Quick search** field.
  - ➢ This can be P0 Numbers, Requisition Numbers, Vendor Names, etc.

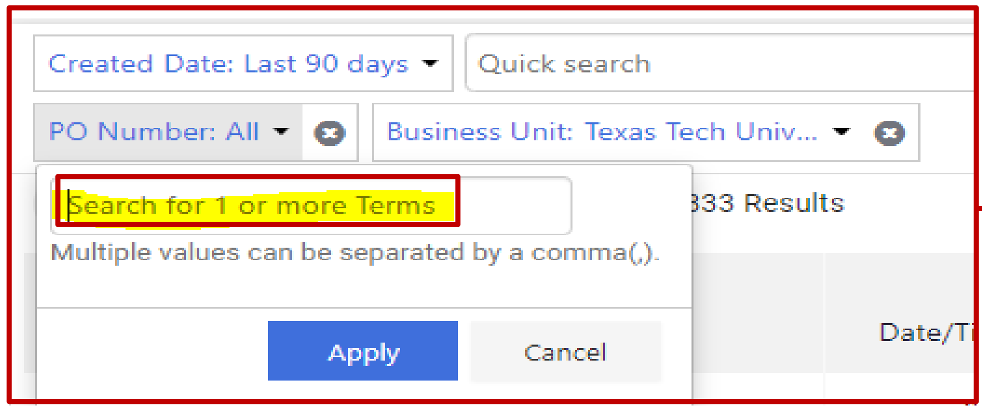
Performing an Advanced Search

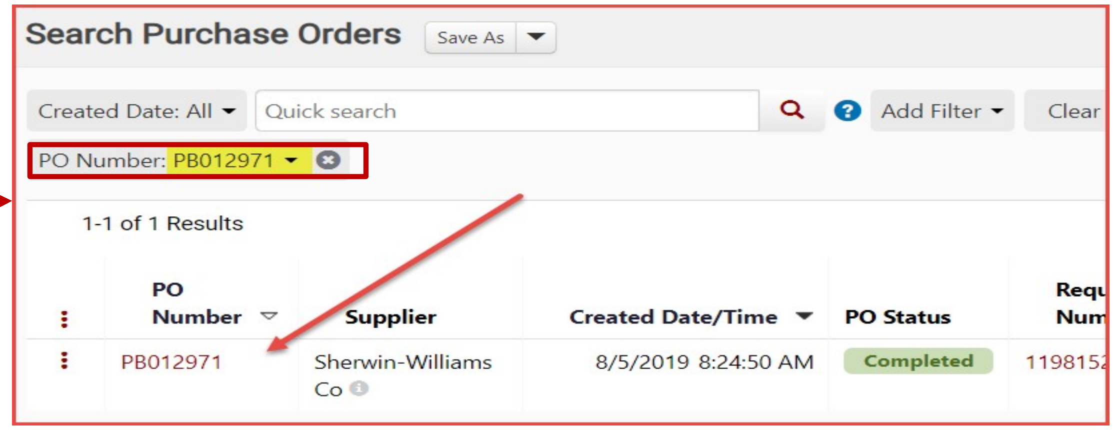
Use the filter options to perform a more specific search.

- To choose a different date range, click the **Created Date: Last 90 days** drop down button, and select a different date option.
- To add criteria, 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 in the Classic Experience.



- 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.
- Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose **PO Number**, an overlay displays from which you can select the appropriate PO Number. **Important**: When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in the **Suggested** list, enter a value in the search field.

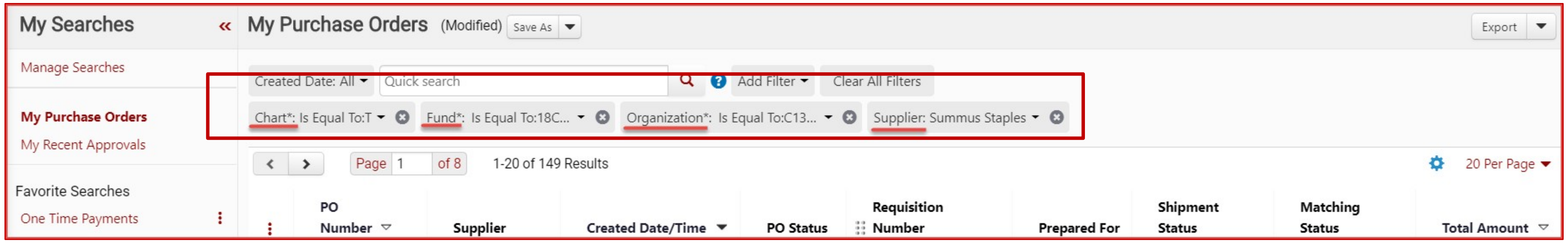




- When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the ⊗ to remove the filter.
- Repeat the steps above to add additional filters. The search results update to reflect the new filters.

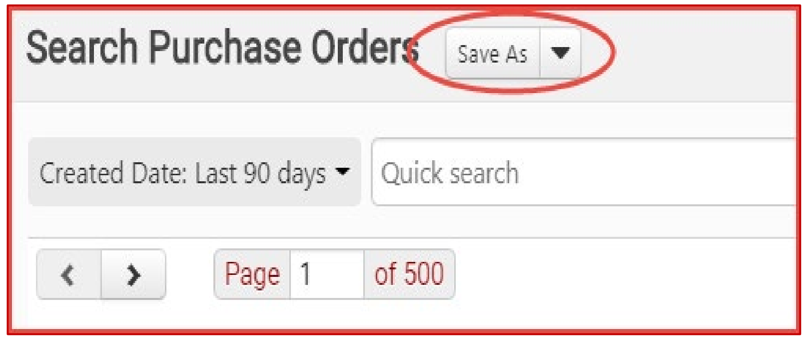
Recommended Filters for Departments

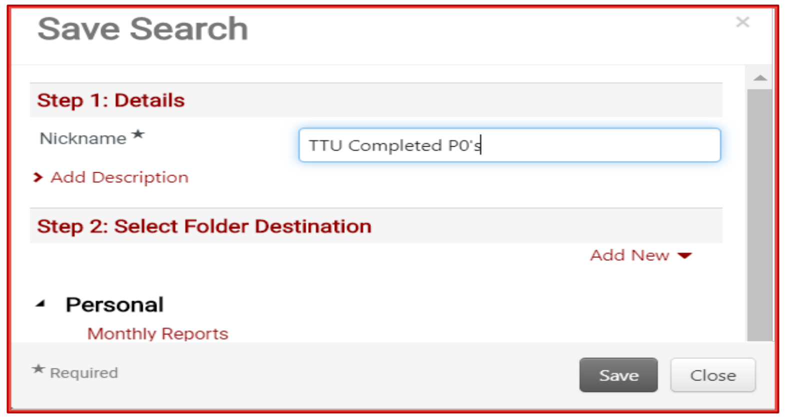
- It is recommended departments use the following filters when using the New Search Experience.
- These filters will help search for your departmental purchase orders!



Create a Saved Search

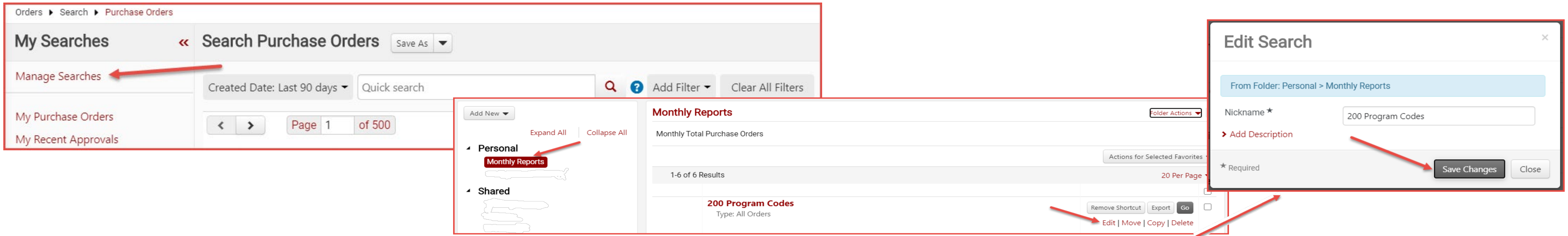
- Perform a search using the desired search criteria.
- Select Save As from the drop-down options at the top of the page.
- Enter a Nickname for the search. This field is required.
- Select a folder in which to save the search, or create a new folder.
- Click Save. The search will be saved in the selected folder.





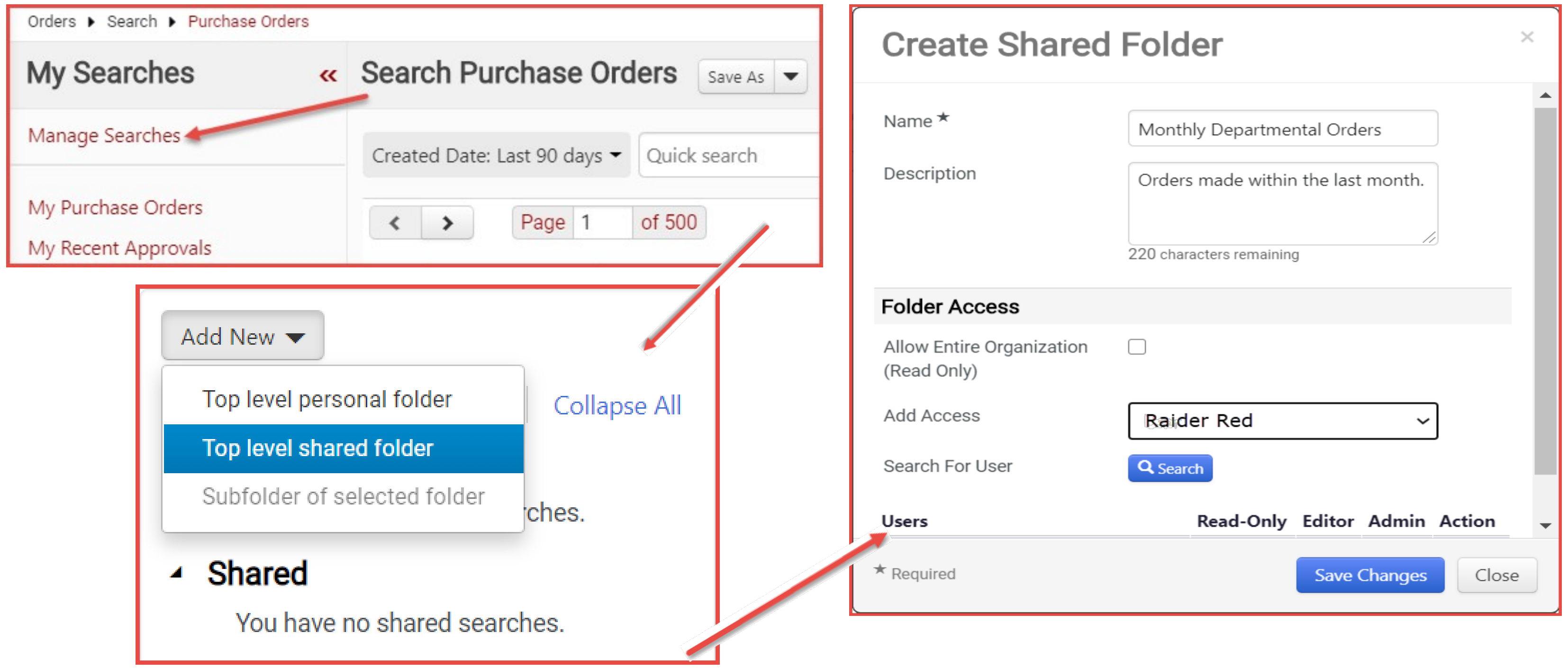
Edit saved search criteria and save or save as new

- Navigate to ***Manage Searches*** or a Saved Search page. Locate the appropriate search. Click the search name to view results.
- 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.
- Click the Save Changes drop-down button to see options:
  - 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.
  - 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.
  - Select **Discard Changes** to remove additional filters applied since the last save.



Creating a Shared Search

- Creating a shared search will allow users to open and view any created searches that have been saved by other users.
- To create a shared folder, users must go to **Manage Searches > Add New > Top Level Shared folder**.
- To share access to a shared folder, users will need to be given permissions. The user who creates the shared folder will have this ability upon setup.
- Users who try and add permissions to an already created search in a shared folder, will have to go to
  Folder Actions > Edit > Add Access > User > User Search



Guided Tour for the New Search Experience

A **Guided Tour** is available to users who are using the New Search Experience. **Guided Tour** options include a step-by-step walk-through on the search page as well as viewing a video and accessing additional information directly from the solution.
When navigating to one of these search pages (**Orders > Search: Requisitions, Purchase Orders, Receipts, or Invoices), the following overlay displays:**

Step-by-Step and Video Tour options: https://www.youtube.com/watch?v=jlrtxcYRMf4#action=share

- **Walk through a tour highlighting important features** - The default selection is based on your user profile setting (see below). Click **Yes** to allow an overlay to display that will walk you through the various features on the search page in a step-by-step manner. Click **No** to not display the tour. See below for additional information about the tour.
- **Watch a video explaining how to use this page** - The default selection is based on your user profile setting (see below). Click **Yes** to display a pop-up window (must be allowed by your browser) to watch a video and access additional information about the search enhancements. Click **No** to not display the video.
- **Show this again** - **Yes** is selected by default. This will allow the Step-by-Step and Video Tour options to display in the overlay 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. This option can be re-enabled in the user profile.