



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.

The screenshot shows the TechBuy Home screen. The left sidebar contains navigation options: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, and Reporting. The 'Orders' menu is expanded, showing 'Search', 'My Orders', and 'Approvals'. The 'Search' option is highlighted. The main content area shows 'Search All Orders' with a search bar and filters. A red box highlights the 'Search' option in the sidebar, and a red arrow points from it to the search bar in the main content area.

The screenshot shows the 'My Purchase Orders' page. The left sidebar contains navigation options: Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The 'Orders' menu is expanded, showing 'My Searches'. The main content area shows 'My Purchase Orders' with a search bar and filters. A red box highlights the search bar, and a red arrow points from it to a text box that says 'Type in keyword: Req#, PO#, Vendor Name, etc.'. The search results are displayed in a table with columns: PO Number, Supplier, Created Date/Time, PO Status, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount.

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Matching Status	Total Amount
P0813214	Summus Dell	7/17/2020 8:55:46 AM	Completed	133844021	Annette Hinojos	Sent To Supplier	Fully Matched	15,962.10 USD
P0812772	Summus Dell	7/15/2020 1:29:43 PM	Completed	132933819	Annette Hinojos	Sent To Supplier	Fully Matched	2,652.51 USD
P0811752	Summus Dell	7/10/2020 10:53:00 AM	Completed	133636275	Annette Hinojos	Sent To Supplier	No Matches	967.68 USD
TB863667	El Paso Times	5/12/2020 8:22:55 AM	Pending	131825389	Annette Hinojos	No Shipments	No Matches	1.00 USD

Performing a Quick Search from My Searches

- ❖ Enter a keyword or phrase in the **Quick search** field.
 - This can be PO 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.

The screenshot shows the 'My Purchase Orders' interface. The 'Created Date' filter is set to 'Last 90 days'. The 'Add Filter' button is highlighted, and a dropdown menu is open, showing a search field and a list of filters. The 'Selected Filters' section shows 'PO Owner' is checked. The 'Identifiers' section lists various filters like 'Contract Number', 'Ext. Requisition Number', 'Invoice Name', 'Invoice Number(s)', 'PO Number', 'Packing Slip Number(s)', 'Receipt Name', 'Receipt Number', and 'Requisition Name'. A table of results is visible in the background, showing PO numbers, suppliers, and statuses.

- ❖ 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.

The first screenshot shows the search filter configuration overlay. The 'Search for 1 or more Terms' field is highlighted in yellow. The 'Apply' button is visible at the bottom. The second screenshot shows the search results after applying the filter. The 'PO Number' filter is set to 'PB012971'. The results table shows one result for PO Number PB012971, Supplier Sherwin-Williams Co, Created Date/Time 8/5/2019 8:24:50 AM, PO Status Completed, and Requisition Number 1198152.

- ❖ 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 **X** 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!

My Searches << My Purchase Orders (Modified) Save As Export

Manage Searches

Created Date: All Quick search Add Filter Clear All Filters

My Purchase Orders

My Recent Approvals

Favorite Searches

One Time Payments

Page 1 of 8 1-20 of 149 Results 20 Per Page

PO Number Supplier Created Date/Time PO Status Requisition Number Prepared For Shipment Status Matching Status Total Amount

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.

Search Purchase Orders Save As

Created Date: Last 90 days Quick search

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Save Search

Step 1: Details

Nickname * TTU Completed PO

Add Description

Step 2: Select Folder Destination

Personal

Monthly Reports

Save Close

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.

Orders Search Purchase Orders

My Searches << Search Purchase Orders (Modified) Save As

Manage Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

My Purchase Orders

My Recent Approvals

Page 1 of 500

Personal

Monthly Reports

Monthly Total Purchase Orders

1-6 of 6 Results 20 Per Page

200 Program Codes Type: All Orders

Remove Shortcut Export Go

Edit | Move | Copy | Delete

From Folder: Personal > Monthly Reports

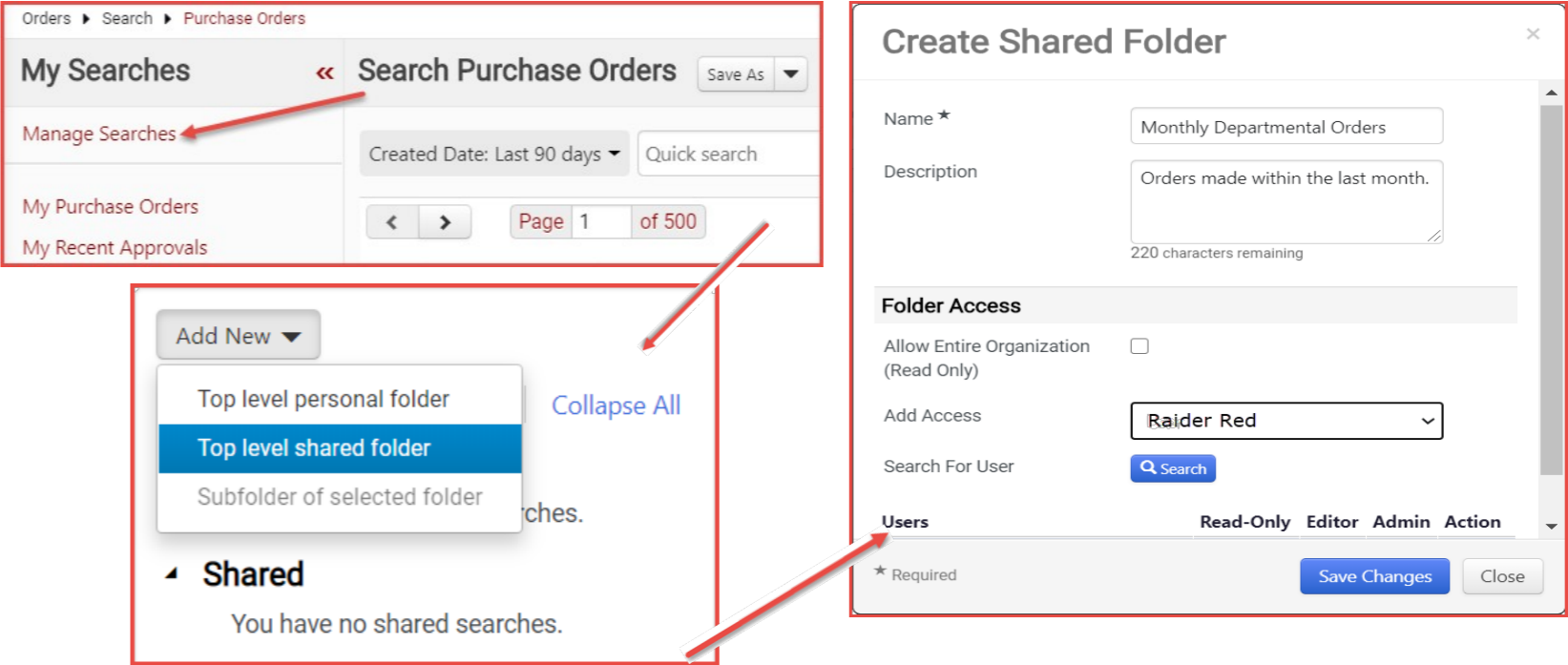
Nickname * 200 Program Codes

Add Description

Save Changes Close

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=jIrtxcYRMf4#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.