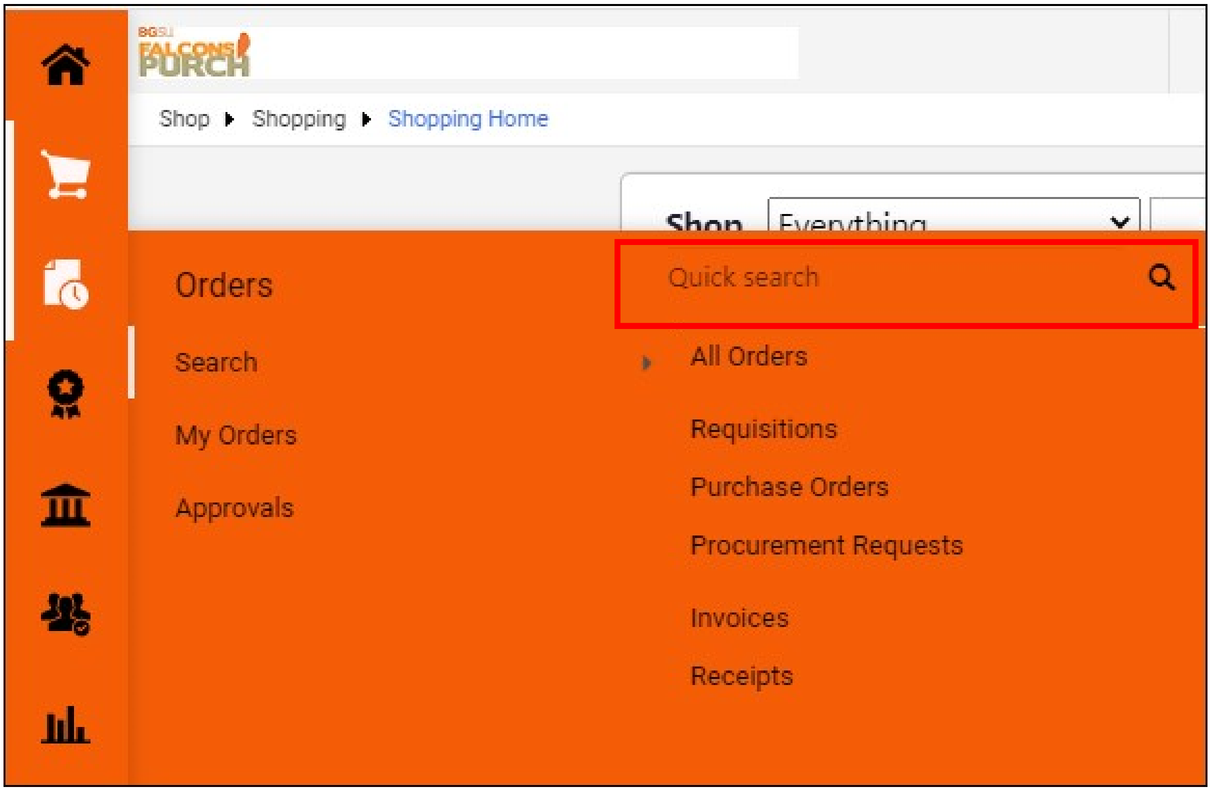
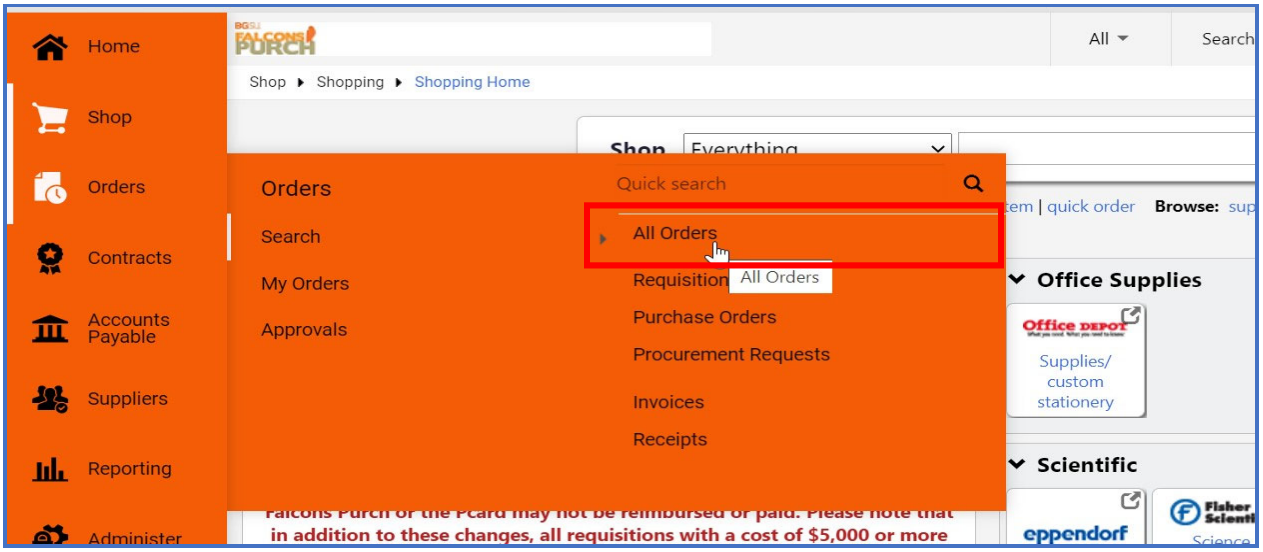
Search and Export

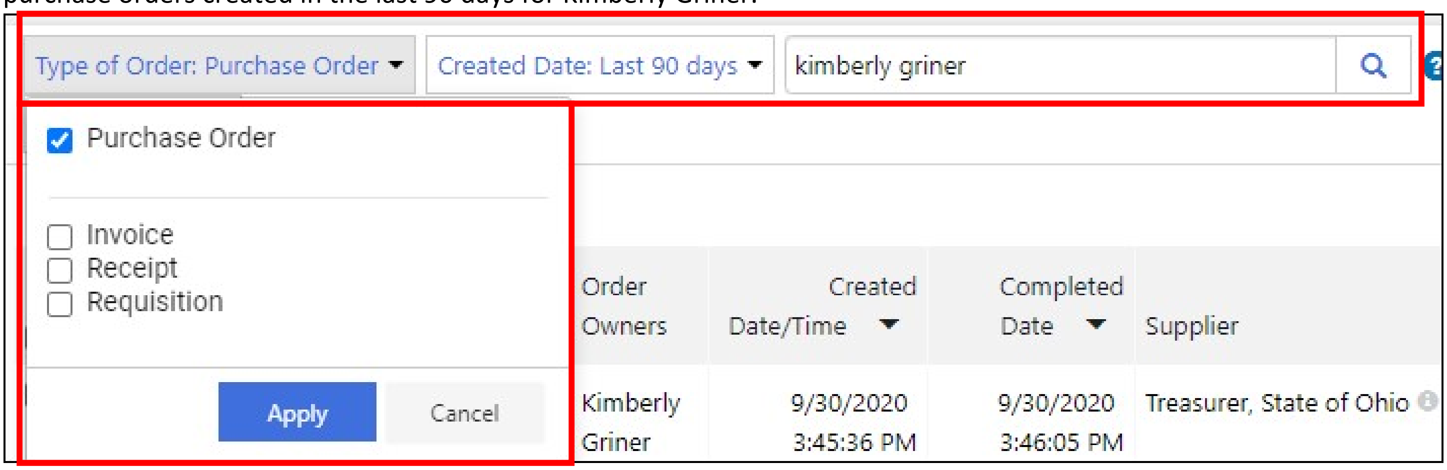
Hover over the Orders icon and click on Search. You can select the type of documents you would like to search for or you can enter information in the Quick search. The Quick search will allow you to search for anything. Some examples are supplier name, employee name, purchase order number, Invoice number, and requisition number.



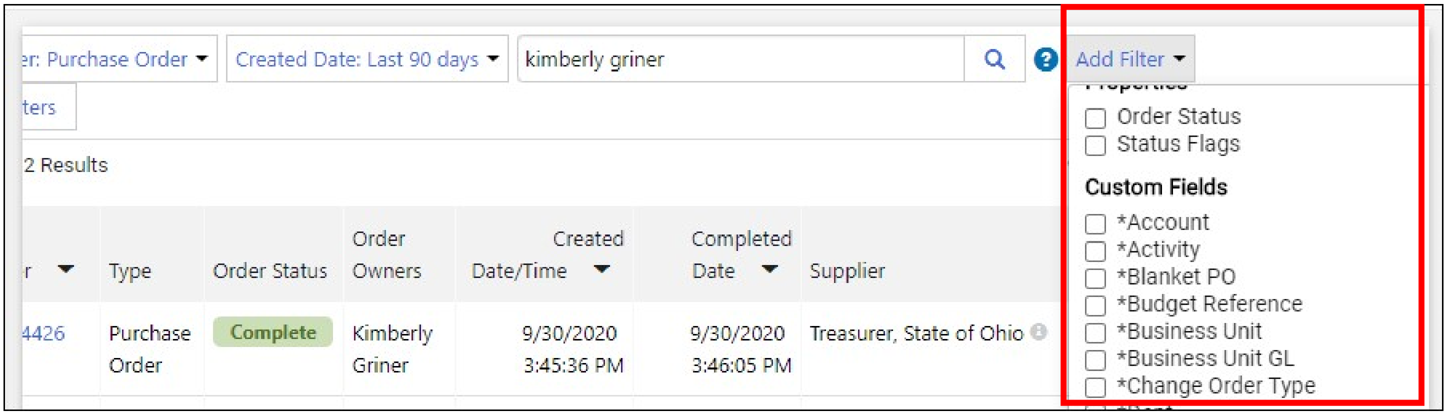
All Orders is a versatile search that will allow you to select the document type and toggle between the different document types.



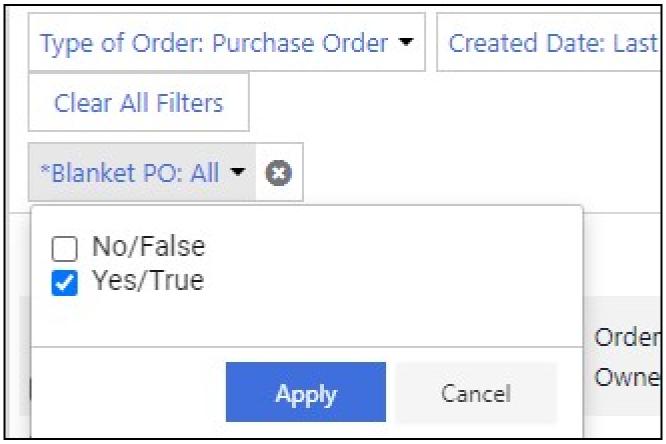
Click on the dropdown for the Type of Order to pull a select the document type(s). Click the Create date to limit the search to a specific date or date range. In the Search field I entered an employee's name. This report will give me all purchase orders created in the last 90 days for Kimberly Griner.



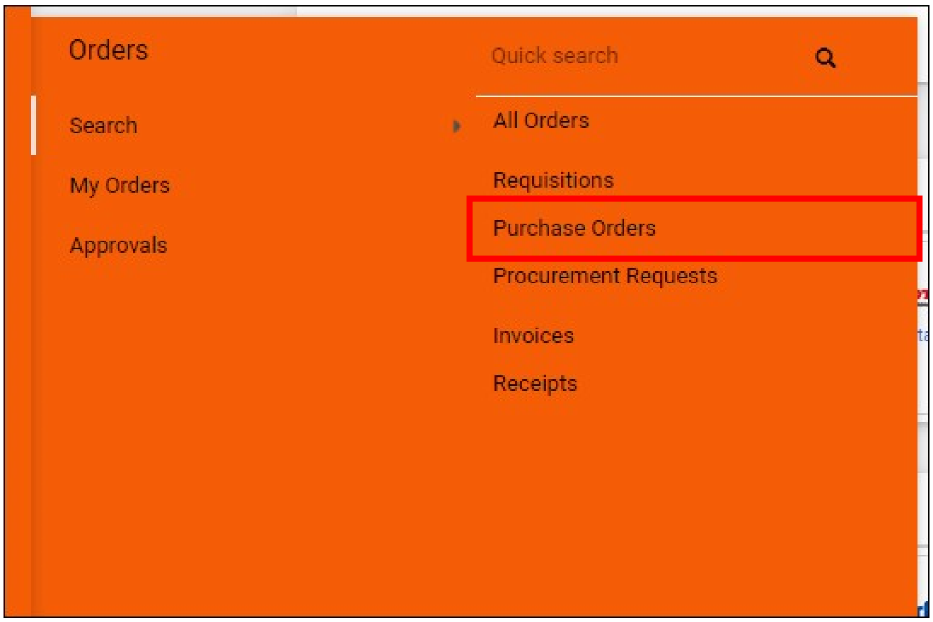
I can further refine by search by clicking on the Add Filter dropdown. If you want to separate out the Blanket POs, you would check the Blanket PO box.



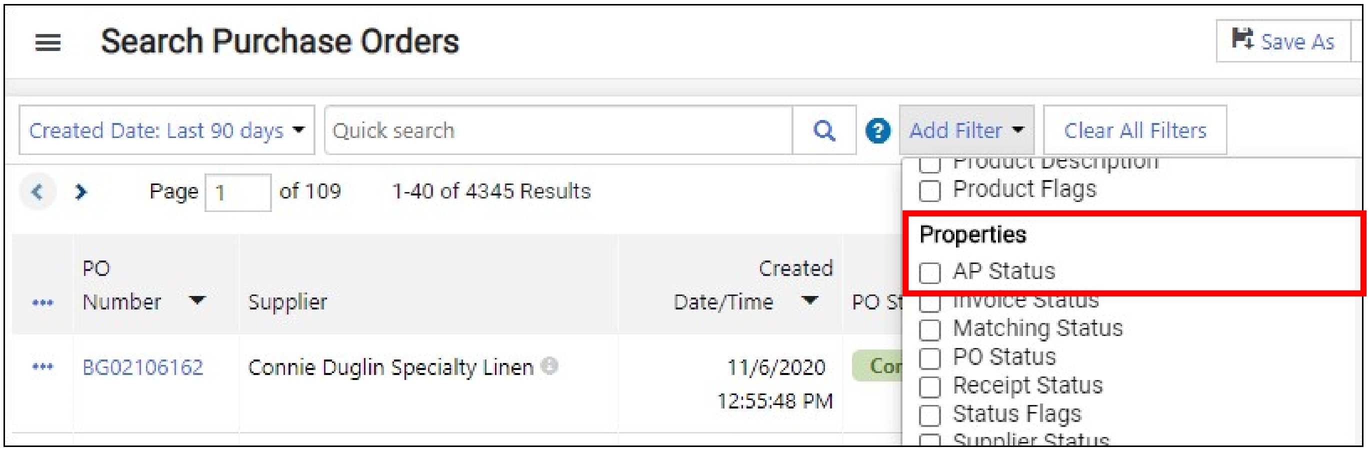
Selecting Yes/True will narrow the search down to only blanket POs.



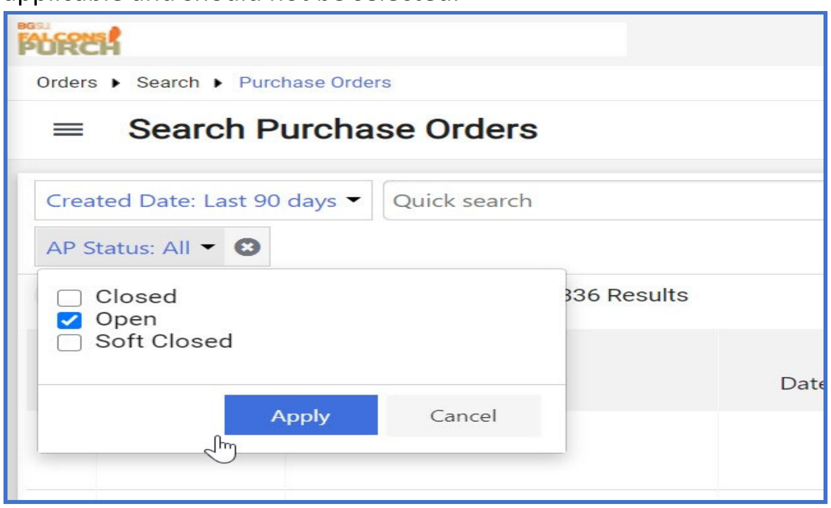
If you want to pull up only Open purchase orders, you must select the Purchase Order search.



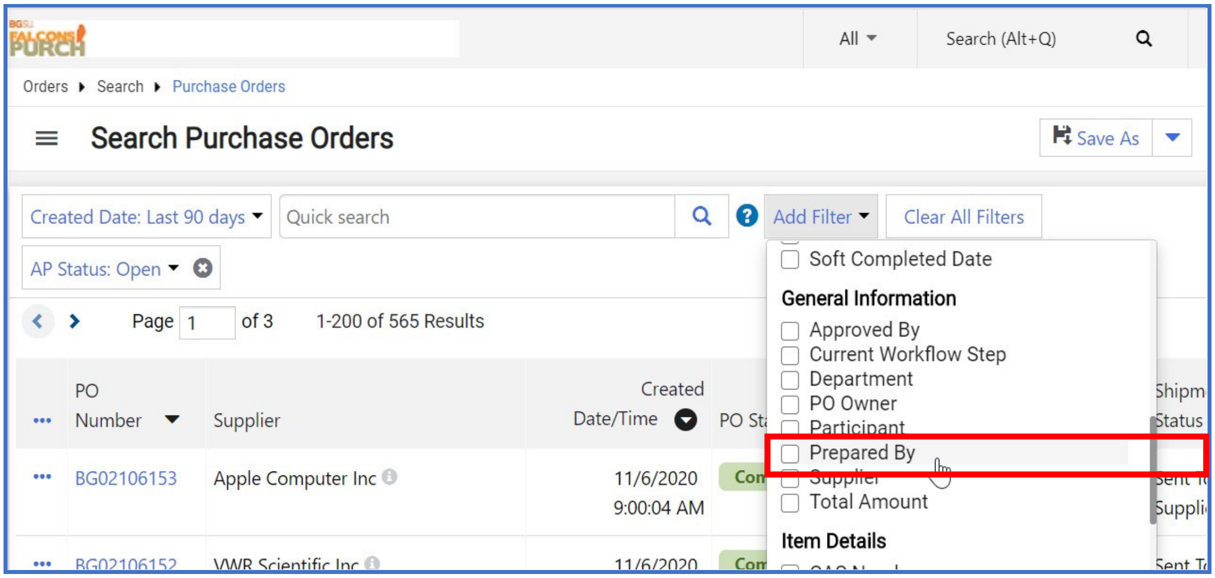
After you select your criteria, click the Add Filter dropdown then select AP Status.



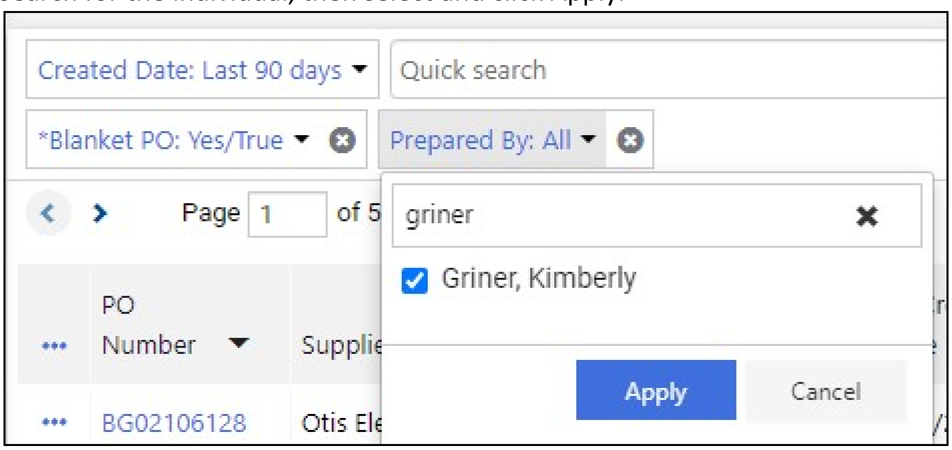
Select Open then click Apply. This restricts the search results for only POs that are open. The soft close option is not applicable and should not be selected.



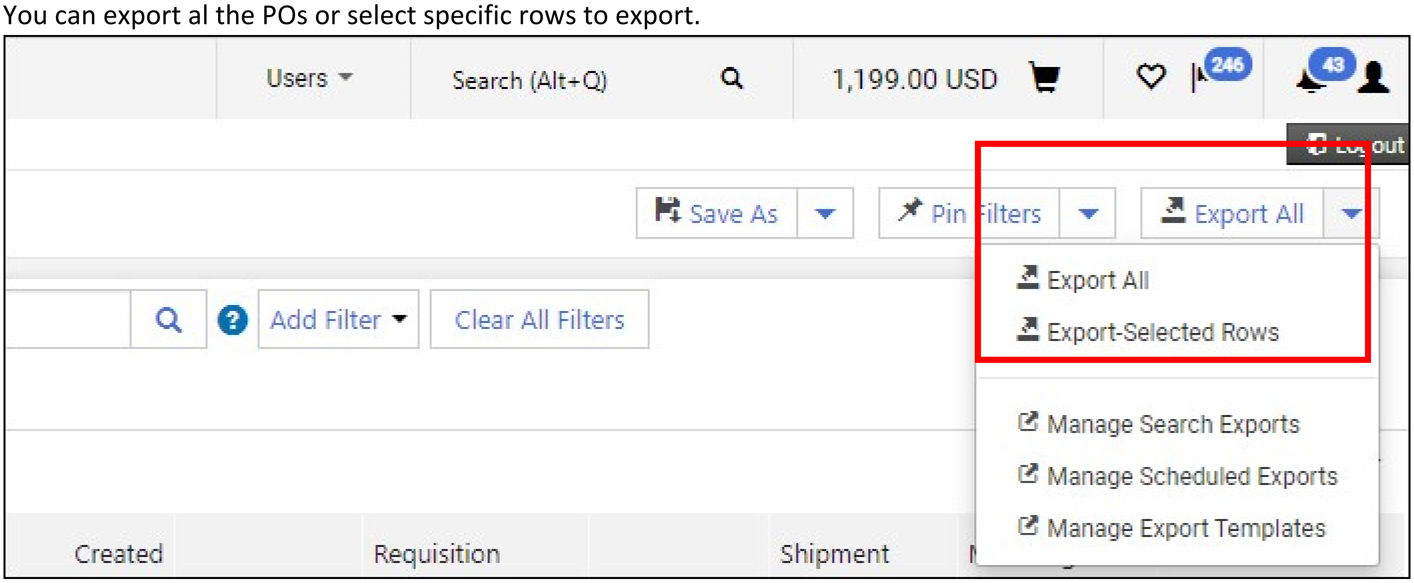
You can further refine this search to view purchase orders that were prepared by a specific individual. Click Add Filter and select Prepared By.



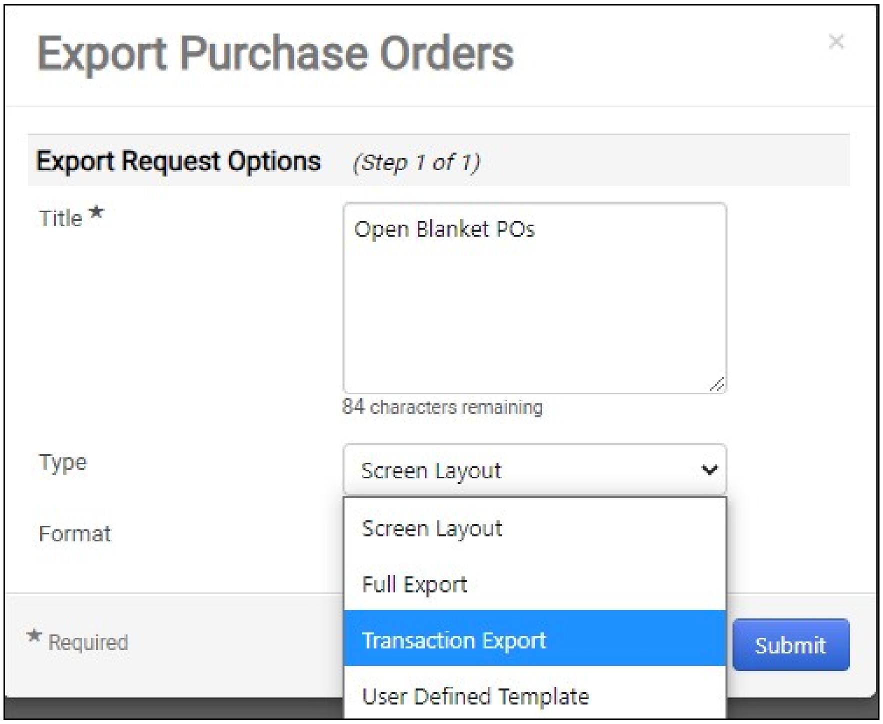
Search for the individual, then select and click Apply.



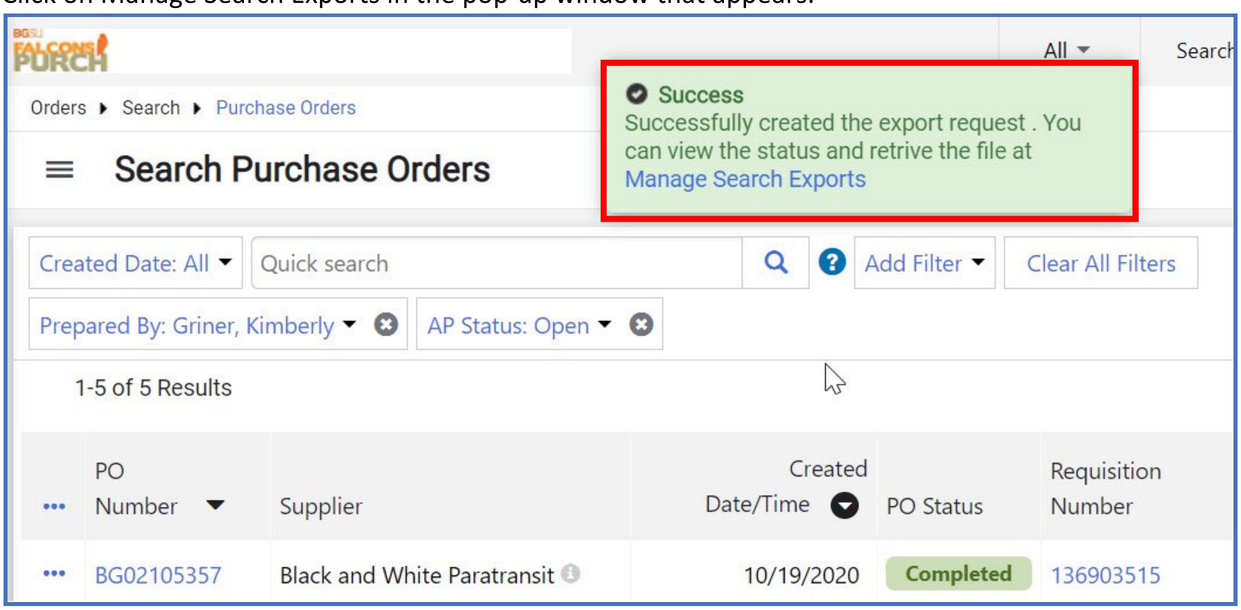
If you would like a spreadsheet of the search results, click on the dropdown for Export All found in the upper left corner. You can export al the POs or select specific rows to export.



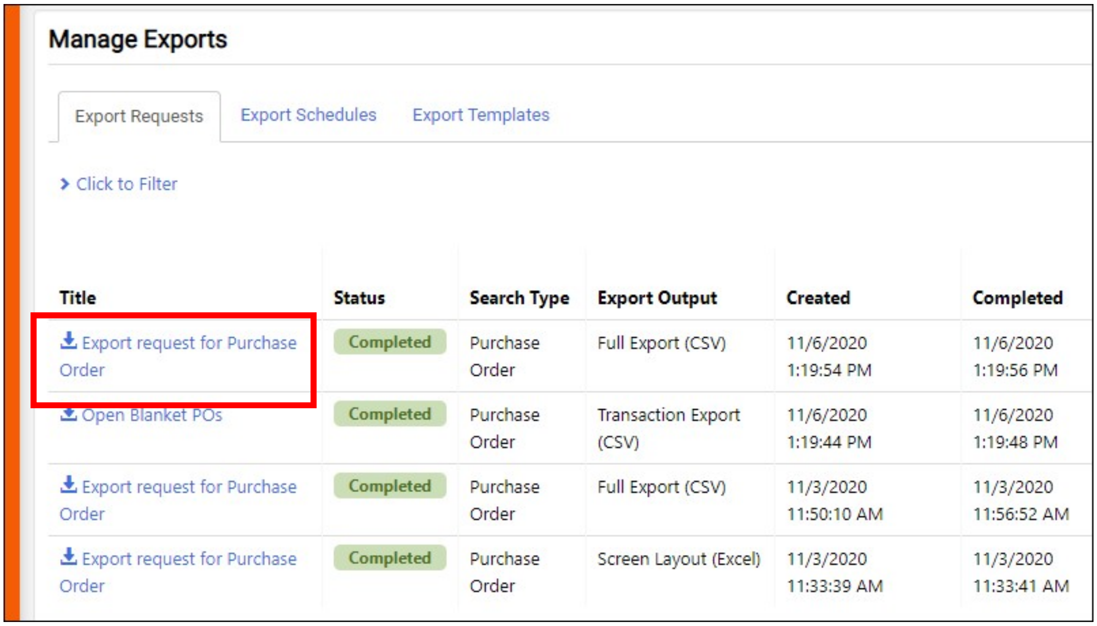
Enter a File name and determine what Type you need. The screen layout will generate a basic report. The transaction and full export report will provide more detail. Click Submit.



Click on Manage Search Exports in the pop-up window that appears.



Click on the Title of the report to download.

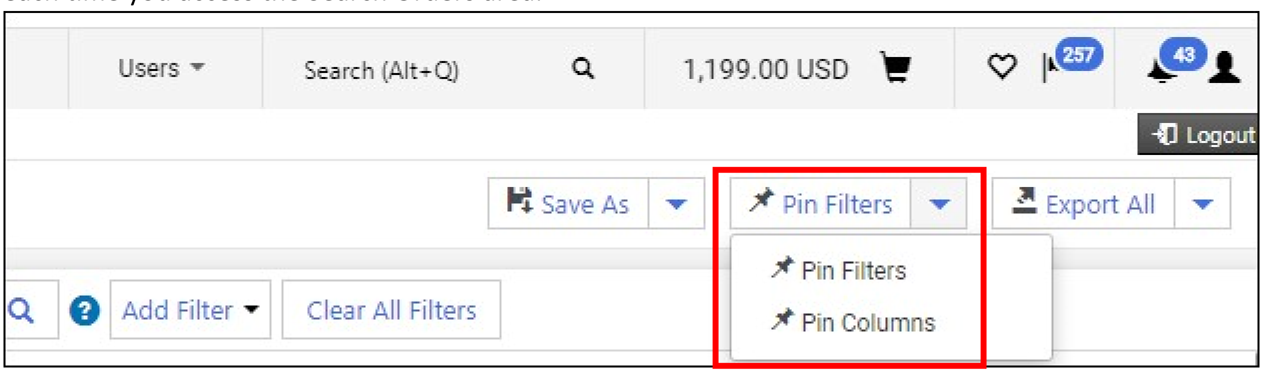

Manage Exports

Export Requests | Export Schedules | Export Templates

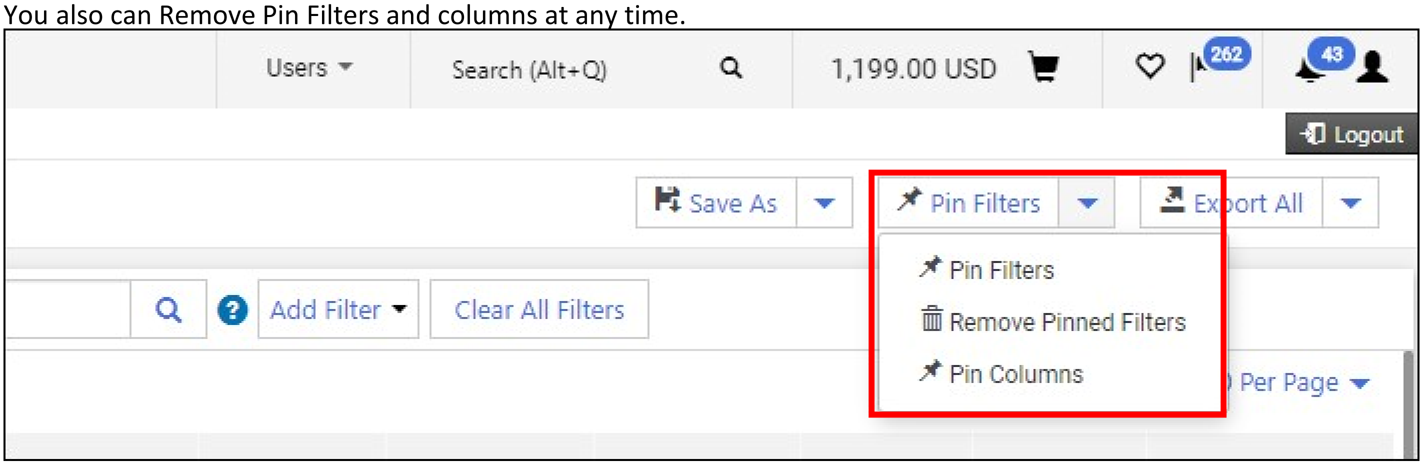
> Click to Filter

Title	Status	Search Type	Export Output	Created	Completed
Export request for Purchase Order	Completed	Purchase Order	Full Export (CSV)	11/6/2020 1:19:54 PM	11/6/2020 1:19:56 PM
Open Blanket POs	Completed	Purchase Order	Transaction Export (CSV)	11/6/2020 1:19:44 PM	11/6/2020 1:19:48 PM
Export request for Purchase Order	Completed	Purchase Order	Full Export (CSV)	11/3/2020 11:50:10 AM	11/3/2020 11:56:52 AM
Export request for Purchase Order	Completed	Purchase Order	Screen Layout (Excel)	11/3/2020 11:33:39 AM	11/3/2020 11:33:41 AM

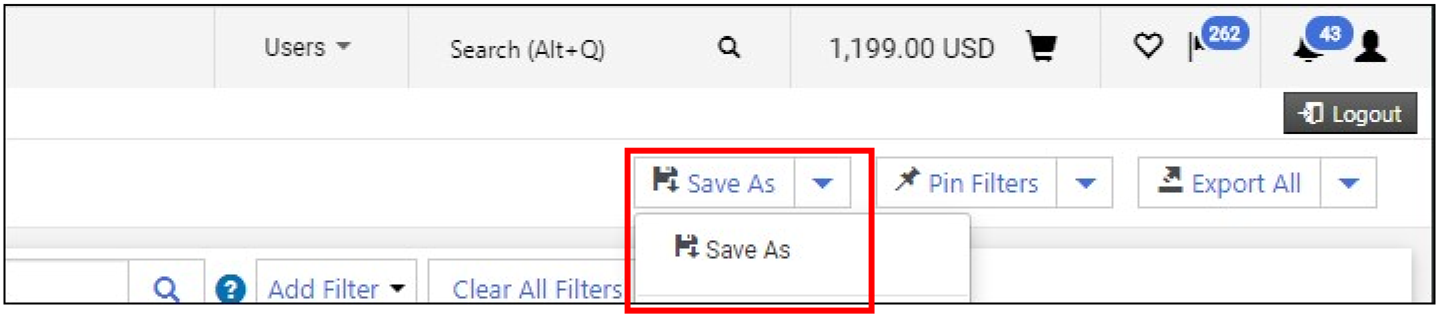
After completing the search, you can also Pin the Filters and Columns you have selected so it will default to that search each time you access the Search Orders area.



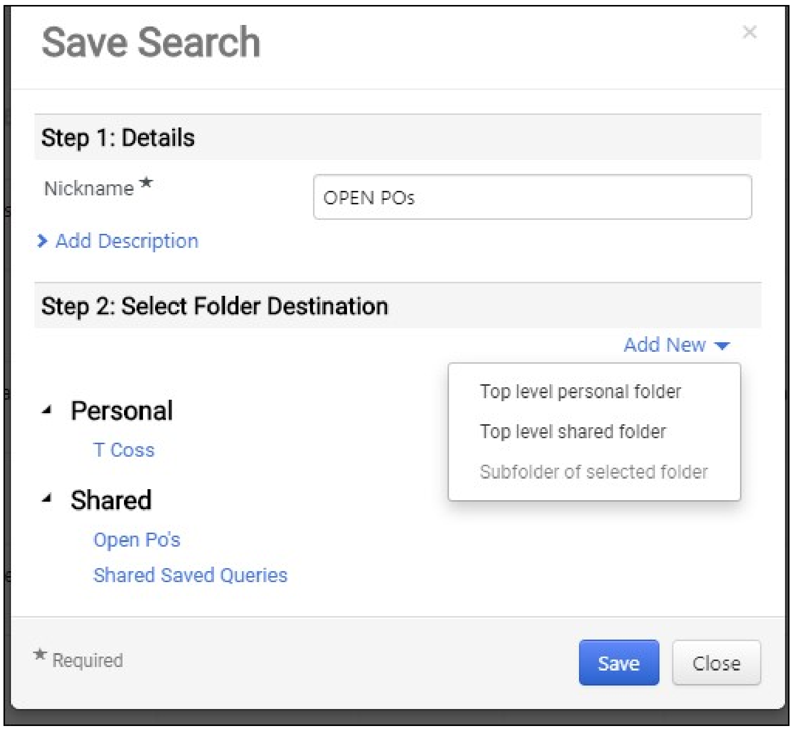
You also can Remove Pin Filters and columns at any time.



To save a search as a template, simply click on Save As. This will allow you to easily access different searches that you would like to run on multiple occasions.

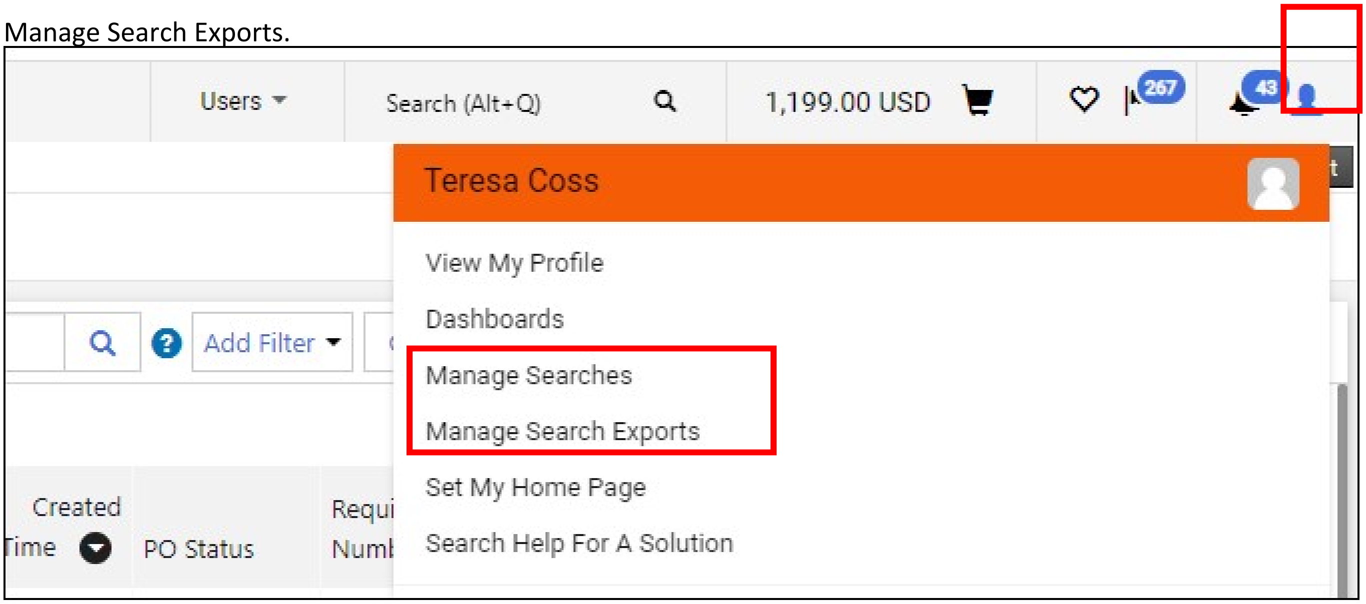


Enter a Nickname for the report. You can add to an existing folder or Add New.

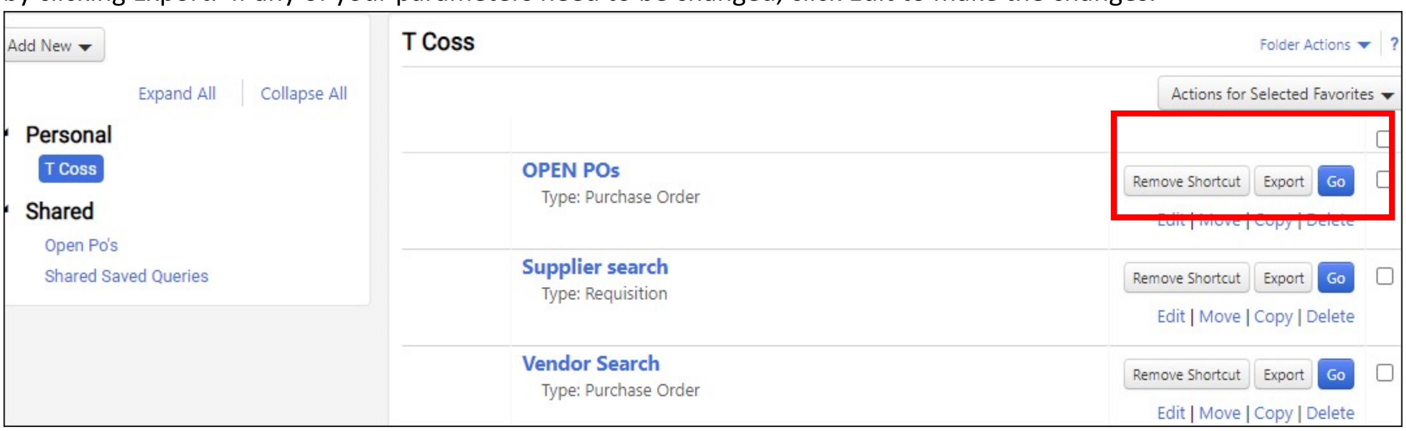


Click on your User Profile in the upper right corner, select Manage Searches. You can also view your exports by selecting

Manage Search Exports.



Select the folder where you would like the export. To run the report click Go. You also can run a report export directly by clicking Export. If any of your parameters need to be changed, click Edit to make the changes.



Support

Area	Phone	Email
Falcon's Purch Assistance	Technical/General: 2-8395	mkalb@bgsu.edu
Invoicing	General: 2-2311	bgsuap@bgsu.edu