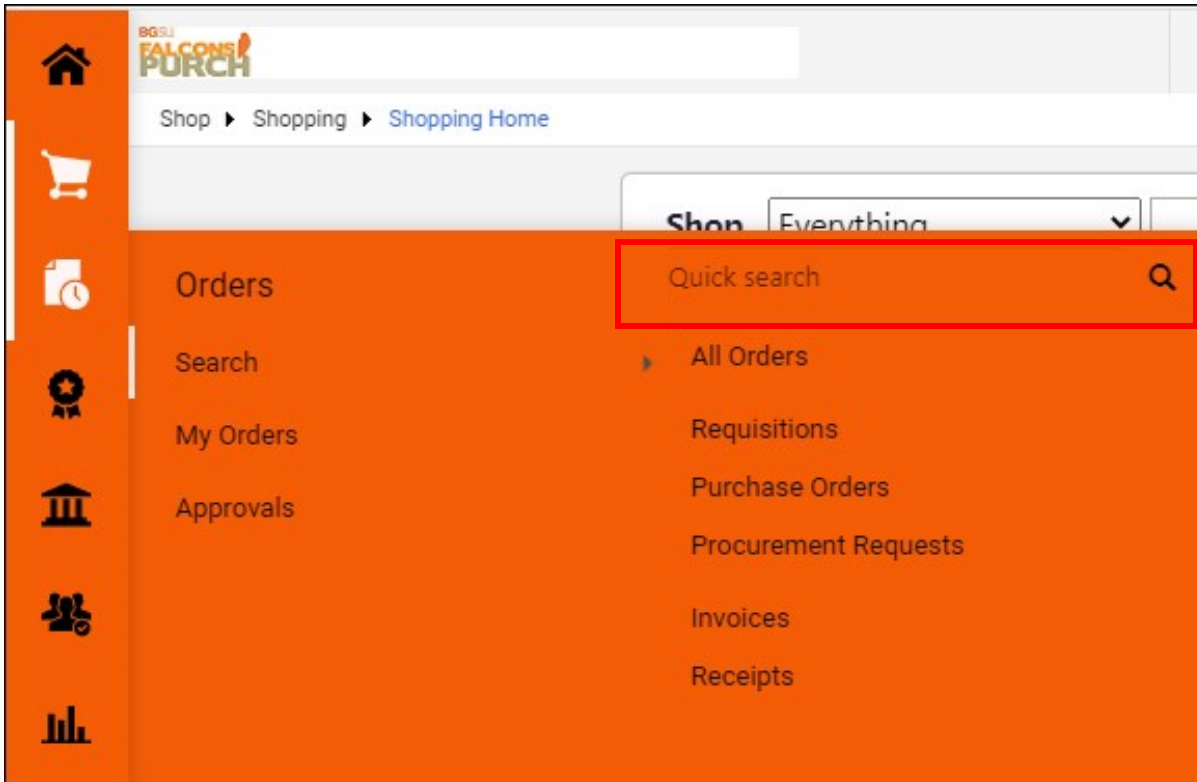
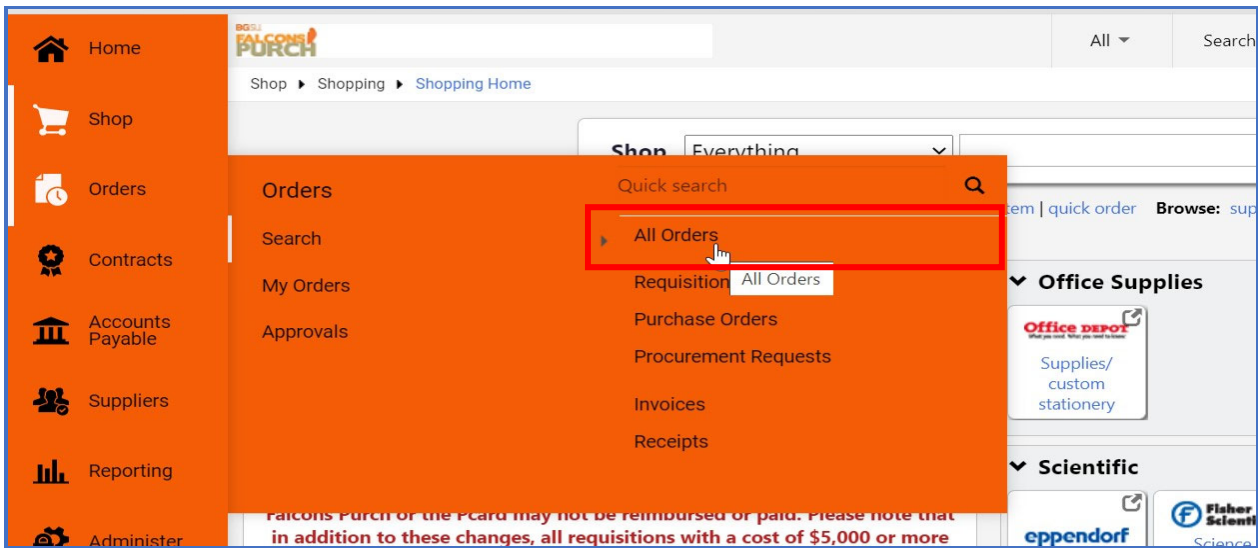


Search and Export

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.

Type of Order: Purchase Order
Created Date: Last 90 days
kimberly griner

☒ Purchase Order
☐ Invoice
☐ Receipt
☐ Requisition

Order Owners	Created Date/Time	Completed Date	Supplier
Kimberly Griner	9/30/2020 3:45:36 PM	9/30/2020 3:46:05 PM	Treasurer, State of Ohio

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.

er: Purchase Order ▾ Created Date: Last 90 days ▾ kimberly griner 🔍 ? Add Filter ▾

2 Results

Order ID	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
4426	Purchase Order	Complete	Kimberly Griner	9/30/2020 3:45:36 PM	9/30/2020 3:46:05 PM	Treasurer, State of Ohio ⓘ

Properties

☐ Order Status

☐ Status Flags

Custom Fields

☐ *Account

☐ *Activity

☐ *Blanket PO

☐ *Budget Reference

☐ *Business Unit

☐ *Business Unit GL

☐ *Change Order Type

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

Type of Order: Purchase Order ▾ Created Date: Last 90 days ▾

Clear All Filters

*Blanket PO: All ▾ ✕

☐ No/False

☒ Yes/True

Apply Cancel

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

Orders Quick search 🔍

- Search ▸ All Orders
- My Orders
- Approvals
- Requisitions
- Purchase Orders
- Procurement Requests
- Invoices
- Receipts

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

Search Purchase Orders Save As

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

Page 1 of 109 1-40 of 4345 Results

PO Number	Supplier	Created Date/Time	PO Status
BG02106162	Connie Duglin Specialty Linen	11/6/2020 12:55:48 PM	Cor

Properties

- ☐ AP Status
- ☐ Invoice Status
- ☐ Matching Status
- ☐ PO Status
- ☐ Receipt Status
- ☐ Status Flags
- ☐ Supplier 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.

Search Purchase Orders

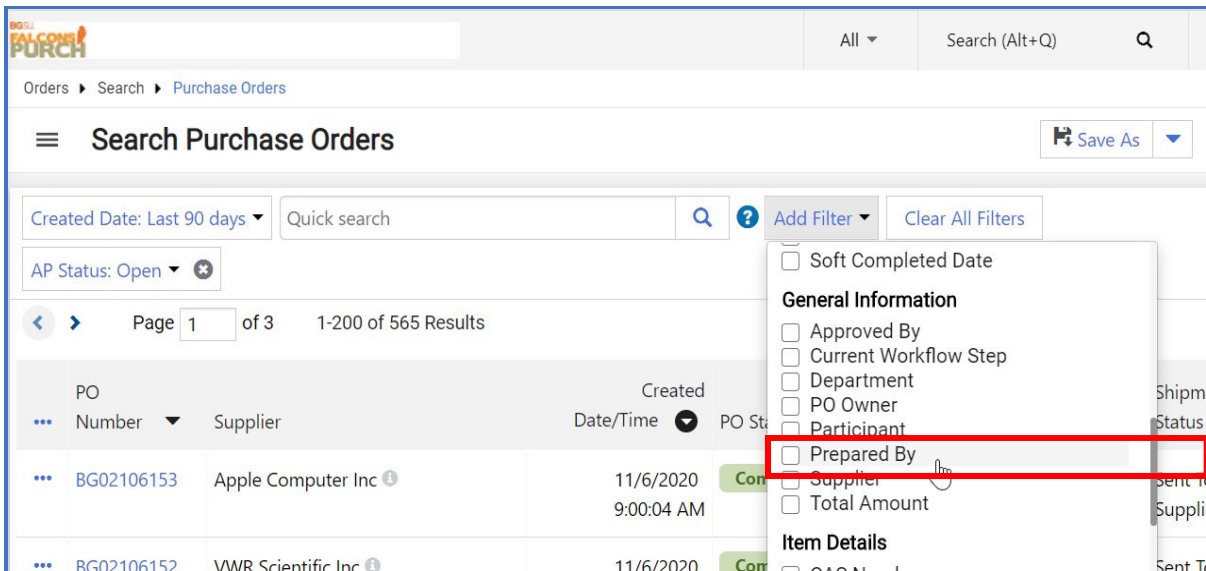
Created Date: Last 90 days Quick search

AP Status: All ✖

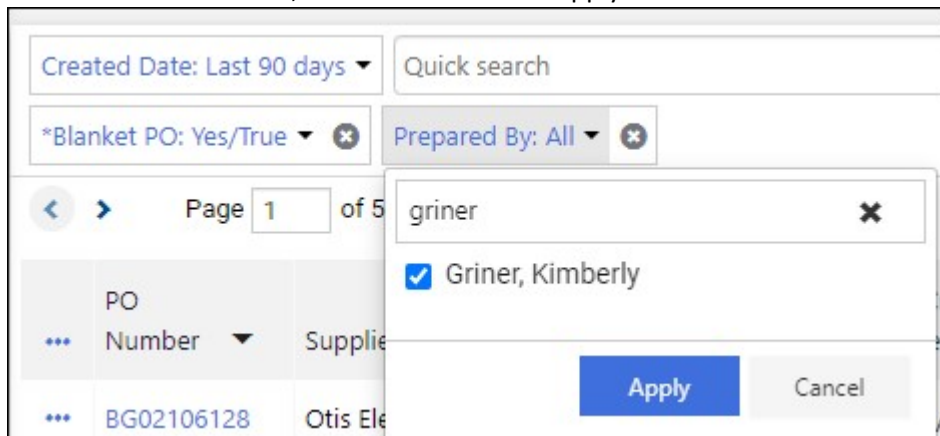
☐ Closed
☒ Open
☐ Soft Closed

Apply Cancel

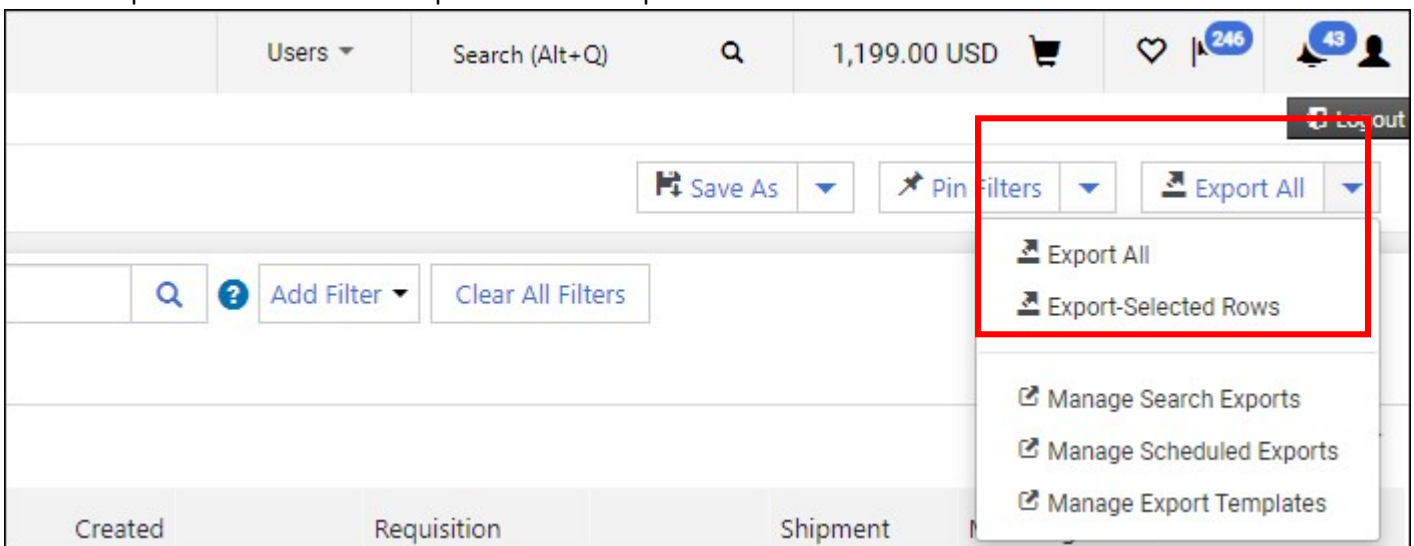
You can further refine this search to view purchase orders that were prepared by a specific individual. Click Add Filter and select Prepared By.



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 all the POs or select specific rows to export.



Export Purchase Orders

Export Request Options

(Step 1 of 1)

Title *

Open Blanket POs

84 characters remaining

Type

Screen Layout

Format

Screen Layout

Full Export

Transaction Export

User Defined Template

★ Required

Submit

BGSU FALCONS PURCH

Orders ▸ Search ▸ Purchase Orders

Search Purchase Orders

✔ **Success**
Successfully created the export request . You can view the status and retrieve the file at [Manage Search Exports](#)

Created Date: All ▾ Quick search [] [?] Add Filter ▾ Clear All Filters

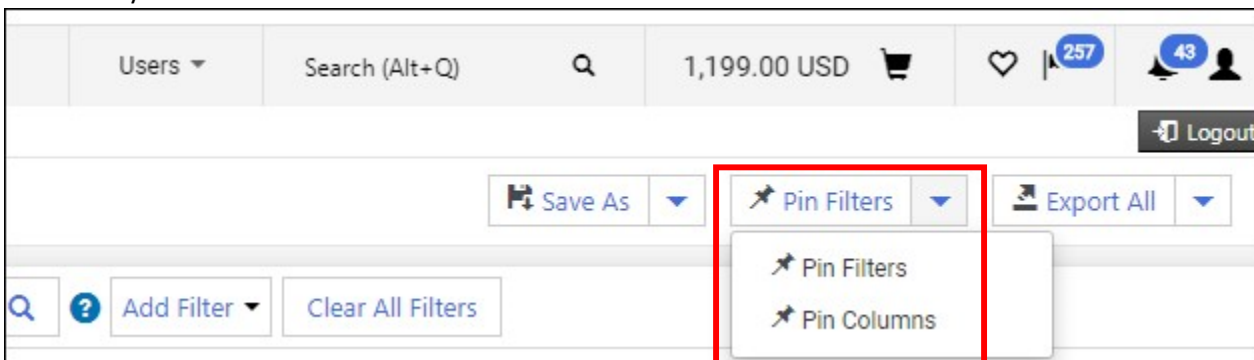
Prepared By: Griner, Kimberly ▾ ✕ AP Status: Open ▾ ✕

1-5 of 5 Results

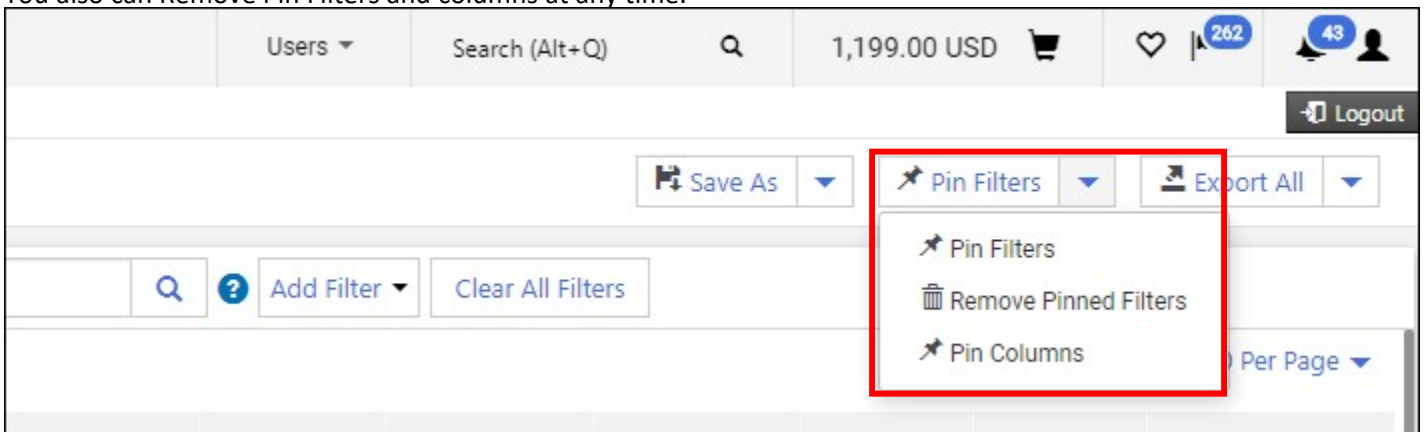
PO Number ▾	Supplier	Created Date/Time ▾	PO Status	Requisition Number
BG02105357	Black and White Paratransit ⓘ	10/19/2020	Completed	136903515

Manage Exports					
<div>Export Requests</div> <div>Export Schedules</div> <div>Export Templates</div>					
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

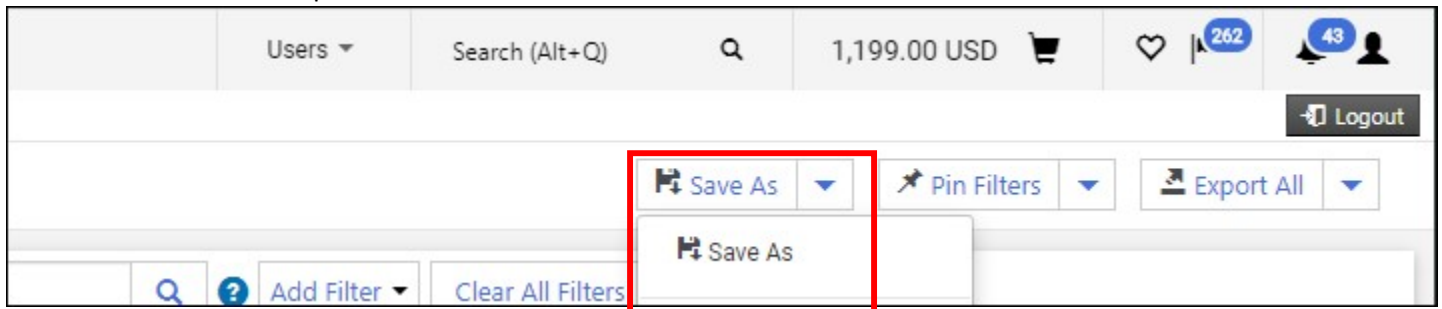
After completing the search, you can also Pin the Filters and Columns you have selected so it will default to that search each time you access the Search Orders area.



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.

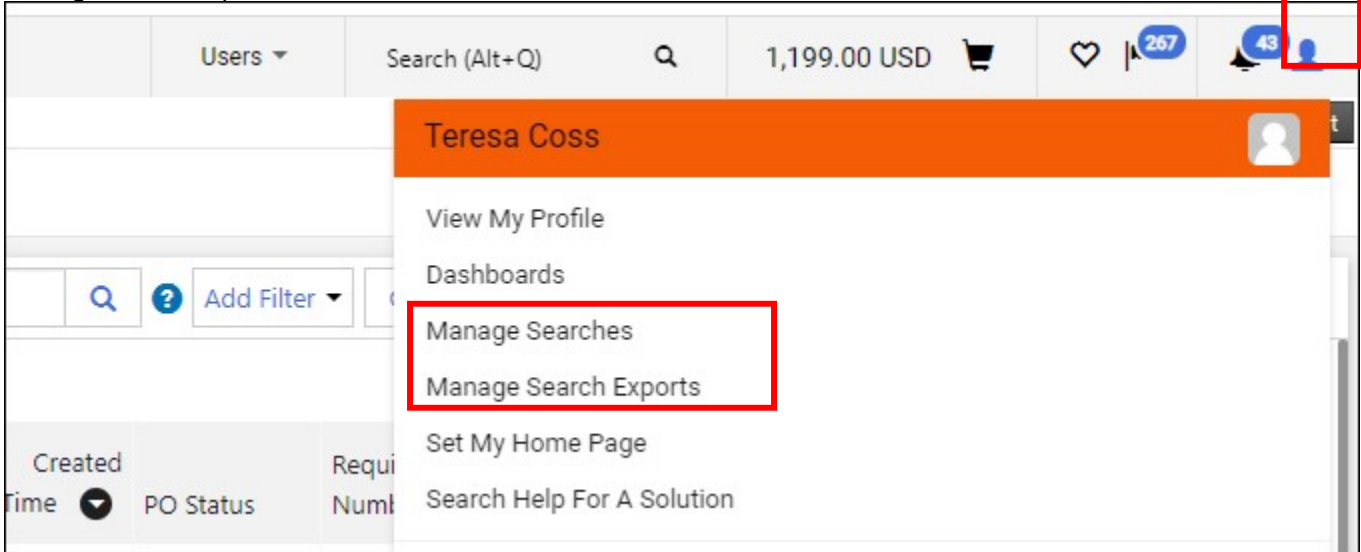


Enter a Nickname for the report. You can add to an existing folder or Add New.

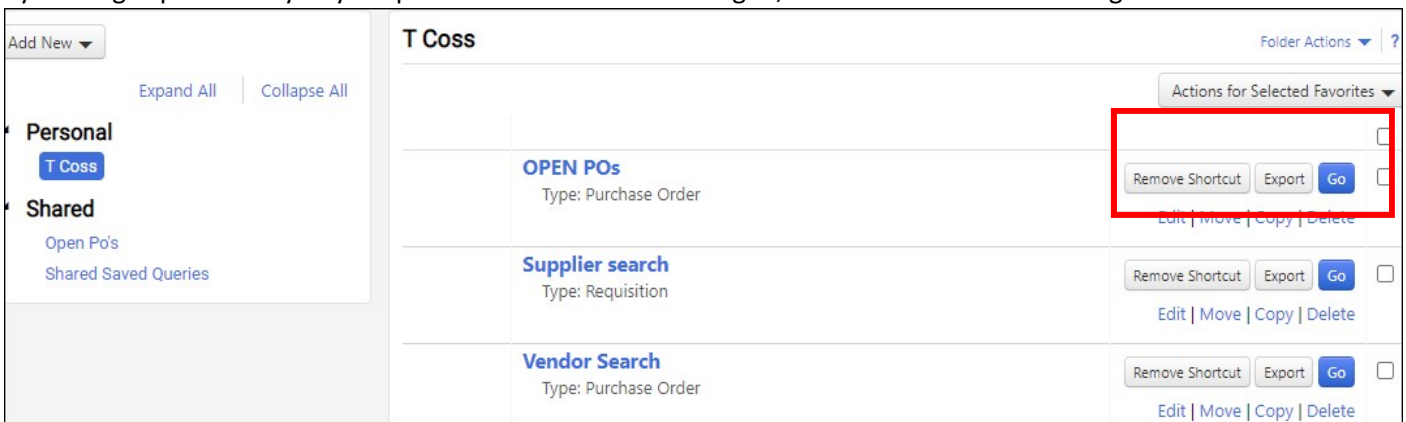
A screenshot of a 'Save Search' dialog box. The dialog has a title bar with 'Save Search' and a close button. It is divided into two steps. Step 1: Details, includes a 'Nickname' field with a star icon and the text 'OPEN POs'. Below it is a link '> Add Description'. Step 2: Select Folder Destination, includes a link 'Add New' with a dropdown arrow. Below this is a tree view with two main categories: 'Personal' and 'Shared'. Under 'Personal' is 'T Coss'. Under 'Shared' are 'Open Po's' and 'Shared Saved Queries'. A tooltip is visible over the 'Add New' link, showing three options: 'Top level personal folder', 'Top level shared folder', and 'Subfolder of selected folder'. At the bottom left is a star icon and the text 'Required'. At the bottom right are 'Save' and 'Close' buttons.

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