



TEXAS TECH UNIVERSITY
TechBuy™

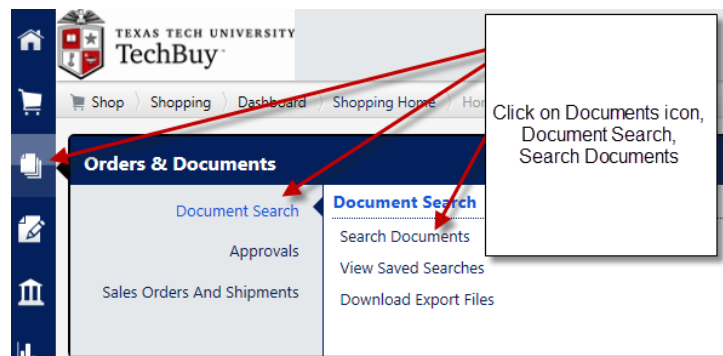
Document Search Functionality Training Guide

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Accessing Document Search Functionality

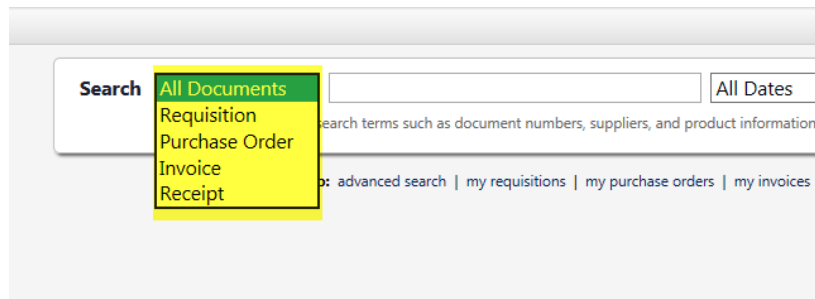
There are several ways to search for your documents in TechBuy. To search using the icons located on the left hand side of your home page, click documents icon > Document Search > Search Documents.



This will load the document search functionality. Although Document Search may default to the Simple Search page, you can also access Advanced Search, My Requisitions, My Purchase Orders and My Invoices from this screen.

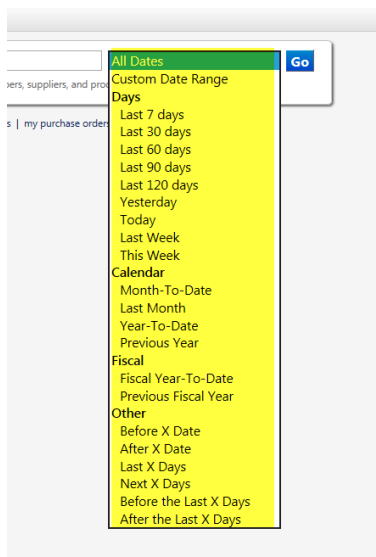
Using Simple Search

From the drop down, you may select All Documents, Requisitions, Purchase Order, Invoice, or Receipt.



The screenshot shows a search interface with a 'Search' button and a dropdown menu. The dropdown menu is open, displaying the following options: 'All Documents' (highlighted in green), 'Requisition', 'Purchase Order', 'Invoice', and 'Receipt'. To the right of the dropdown is a search input field and a button labeled 'All Dates'. Below the input field, there is a line of text: 'Search terms such as document numbers, suppliers, and product information.' At the bottom of the interface, there are links: 'advanced search | my requisitions | my purchase orders | my invoices'.

You can also narrow your simple search by choosing All Dates, Custom Date Range or one of the ranges listed in the drop down menu.



The screenshot shows a search interface with a dropdown menu for date ranges. The dropdown menu is open, displaying the following options: 'All Dates' (highlighted in green), 'Custom Date Range', 'Days' (with sub-options: 'Last 7 days', 'Last 30 days', 'Last 60 days', 'Last 90 days', 'Last 120 days', 'Yesterday', 'Today', 'Last Week', 'This Week'), 'Calendar' (with sub-options: 'Month-To-Date', 'Last Month', 'Year-To-Date', 'Previous Year'), 'Fiscal' (with sub-options: 'Fiscal Year-To-Date', 'Previous Fiscal Year'), and 'Other' (with sub-options: 'Before X Date', 'After X Date', 'Last X Days', 'Next X Days', 'Before the Last X Days', 'After the Last X Days'). To the right of the dropdown is a 'Go' button. Below the dropdown, there is a line of text: 'Search terms such as document numbers, suppliers, and product information.' At the bottom of the interface, there are links: 'advanced search | my requisitions | my purchase orders | my invoices'.

Using Advanced Search

If you are in Simple Search, click on Advanced Search Link.

Search All Documents All Dates Go

Enter search terms such as document numbers, suppliers, and product information.

Go to: [advanced search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

From the drop down, you may select All Documents, Requisitions, Purchase Order, Invoice, or Receipt.

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

Search All Documents Go simple search

General Information

Document Number(s)

Document Information

Participant(s)

Owner

Date All Dates

Total Amount

Supplier

Department

Business Unit

Item/Product Information

Catalog Number(SKU)

Product Description

Product Flags

<input type="checkbox"/> Controlled substance	<input type="checkbox"/> Energy Star
<input type="checkbox"/> Green	<input type="checkbox"/> Hazardous material
<input type="checkbox"/> Rad Minor	<input type="checkbox"/> Radioactive
<input type="checkbox"/> Recycled	<input type="checkbox"/> Select Agent
<input type="checkbox"/> Toxin	

Go

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

Once you select a search type, more options will be available. However, a general search is available by choosing All Documents. For instance, if you want to see all documents related to a particular vendor, you could search under the supplier name in the All Documents search. There are not as many search criteria for the All Documents as there is for the Requisition, Purchase Order, Invoice and Receipt searches.

Search Criteria

Requisition Search Criteria

Requisition Number – enter the requisition number if known. The new functionality allows you to search for multiple numbers. When searching for multiple numbers, separate each number with a comma (ex. 3747147, 3745862, 2789546).

Requisition Name – if you are naming your carts, then you can search for the requisition name here (ex. Jennifer's office supplies). You can enter a partial description word such as "printing."

Participant(s) - a participant is anyone who touched a document and is in the audit trail for that document. If you know that John Smith approved any workflow, or viewed a requisition, or he was the PI or the Prepared For on a requisition, this search will bring up all related results. More than one name may be entered.

Prepared For – will bring search results for all requisitions that have been prepared for a user. More than one name may be entered.

Prepared By - will bring search results for all requisitions that have been prepared by an end user. More than one name may be entered.

Approved By - will bring search results for all requisitions that have been approved by a requestor, approver or financial manager. More than one name may be entered.

Sourcing Owner - The sourcing owner user field is a type a-head multi value field. Start typing the name of a user that performed a sourcing action for the requisition and a drop down list of matching names will appear. Type username, first name, last name or email address to see relevant user suggestions in the drop down list. Select a name from the list. Start typing another name to add another approved by user to the search parameters.

Date - the date range contains two drop down fields to further customize the date associated with a particular search. A search may be conducted on the submit date (the date the requisition was originally submitted), the create date (the date the requisition was created), the complete date (the date the requisition was completed and became a purchase order), or the Purchase order create date (the date the purchase order was created from the requisition). The date range and can be selected from several options (last 7 days, last 30 days, last 90 days, yesterday, today, last month, etc.) The date range can also be customized.

Total Amount – If the end-user is searching for a requisition for a specific amount, the amount can be entered. It can also be a range such as greater than a specific amount, less than or between.

Supplier - will bring search results for all requisitions for a particular supplier. More than one supplier may be entered.

Department – we do not recommend searches by department, as the departments assignments in TechBuy are not automated.

Business Unit – There are currently two business units in TechBuy (Texas Tech University and Texas Tech University Health Sciences Center. By selecting one of the two business units, the search will bring back all orders associated with that unit. System employees are assigned to Texas Tech University business unit. Members of one business unit may not have access to orders of another business unit.

Catalog Number - Search for documents containing a part number by entering the part number in the "Catalog Number (SKU)" search field. You may search for single part numbers only. Hyphens and spaces are ignored when searching. You may also enter partial catalog number sequences.

Product Description - Search for documents containing a product description by entering description search field. You may search for single part numbers only. Hyphens and spaces are ignored when searching. You may also enter partial catalog number sequences.

Commodity Code - The commodity code field on the advanced search pages allows the user to search for documents that contain a line or lines that have the commodity code. The document may have other codes besides the one(s) specifically searched for because commodity code is a line level value and can differ by line. The search returns documents where any line has a matching value. The commodity code field allows users to search for more than one code at a time. Type the code values and separate them with a comma or a tab within the input field. The user can also select a value by clicking the magnifying glass to initiate a commodity code search.

Form Name/Form Type – to search for a document on a form type (ex. Justification for Proprietary Purchase form).

Products Flags – to conduct a search for any requisition that has a particular product flag attribute (ex. controlled substance, toxin, radioactive, etc.)

Contract Number - to search for a requisition related to a specific contract number.

Purchase Order Number – if the end-user has the purchase order number available but needs to see the supporting documentation that was included on the requisition, then the PO number search will be beneficial.

Current Workflow Step – the current workflow step search will bring back search results for all requisitions that are pending in a current workflow step (ex. Banner FOAPAL Chart T and S or Banner Purchasing).

Workflow Status – workflow status filter options includes completed, partially rejected, withdrawn, pending, or rejected. If the end-user needs to search for all requisitions that were rejected, this would bring back the anticipated search results.

End-users can select any one or any multiple search criteria defined in this guide. For example, the searcher could select all requisitions for participant John smith and for supplier “Staples”).

Furthermore, there are additional search filters that may be applied in the custom fields which will allow the end-user to search for specific FOAP elements. The custom field filters are defined below.

Sourcing Status – sourcing status filter options include out for bid, outstanding events and awarded bid. This would be a good field for referencing your documents with bids awarded, for example.

Status Flags – search by requisition status flags including; with rejected lines, with errors, has lines sent for bid, has lines from an awarded event, with withdrawn lines, with attachments and has lines sent for bids with no award.

Custom Fields – for each custom field you can choose from a drop down to select a value that is exactly as entered, starts with (you want to see everything for an account pool such as 7C0 or 7J0), or is between (ex. you want to search for all Funds between 21A000 and 21A999). Also to the right of each value, you can add another value (account, chart, etc.). This will allow the user to search for more than one custom field value (ex. account codes 7C0010-T and 7C0131-T).

- **Advanced Pay** - toggle between yes or no to see all orders that were flagged as an advance pay.
- **Buyer Name** – search to see all requisitions that were processed by a specific buyer from the Purchasing and Contracting office. Note: not all requisitions have a buyer assigned to them. Most punch-out orders less than \$500 do not stop in the Purchasing and Contracting office for review.
- **Chart** – filter to choose between charts T, S, and H.
- **Account** – filter to search for an account code. This search will bring back all account codes on both the header and line level. If it is set for an exact search you will have to include the “-T” or “-S” at the end of the account code (ex. 7C0010-T). To avoid this extra step, select the starts with option (you can just enter 7C0010).
- **Fund** - filter to search for a fund code. This search will bring back all fund codes on both the header and line level. If it is set for an exact search you will have to include the “-T” or “-S” at the end of the fund code (ex. 18C000-T). To avoid this extra step, select the starts with option (you can just enter 18C000).
- **Organization** - filter to search for an organization code. This search will bring back all organization codes on both the header and line level. If it is set for an exact search you will have to include the “-T” or “-S” at the end of the organization code (ex. C13004-T). To avoid this extra step, select the starts with option (you can just enter C13004).
- **Program** - filter to search for a program code. This search will bring back all program codes on both the header and line level. If it is set for an exact search you will have to include the “-T” or “-S” at the end of the program code (ex. 200-T). To avoid this extra step, select the starts with option (you can just enter 200).
- **Chemical Purchase-Department Delivered To** – EH&S filter to track chemical orders delivered to departments.

- **Chemical Purchase-Room Number** – EH&S filter to track room numbers where chemical orders are delivered.
- **Invoice Attached** – toggle between yes or no to see all orders that were flagged with invoice attached (this would result in a search for all of your after-the-fact orders).
- **LBB Report** – filter to search by LBB codes: construction, professional services, other, information systems and consultant (these are primarily used by Purchasing).
- **Principal Investigator** - – will bring search results for all requisitions that have been prepared for a specific PI (if the PI's name was entered in this field on the requisition). More than one name may be entered.
- **Purchase Documentation** – click select from all values, then toggle to choose direct publisher, exempt purchase, contract, sole source, emergency purchase, govt agency, discount letter on file, has not exceeded \$5,000 bid limit and informal bid (these are searches primarily used by Purchasing).

Custom Fields

Advanced Pay	Is Exactly	<input type="text"/>	
Buyer Name	Is Exactly	<input type="text"/>	Add another Buyer Name
Chart	Is Exactly	<input type="text"/>	Add another Chart
Account	Is Exactly Starts With Is Between	<input type="text"/>	Add another Account
Fund	Is Exactly	<input type="text"/>	Add another Fund
Organization	Is Exactly	<input type="text"/>	Add another Organization
Program	Is Exactly	<input type="text"/>	Add another Program
Chemical Purchase -Department Delivered To	Is Exactly	<input type="text"/>	Add another Chemical Purchase -Department Delivered To
Chemical Purchase -Room Number	Is Exactly	<input type="text"/>	Add another Chemical Purchase -Room Number
Invoice Attached	Is Exactly	<input type="text"/>	
LBB Report	Is Exactly	<input type="text"/>	Add another LBB Report
Principal Investigator	Is Exactly	<input type="text"/>	Add another Principal Investigator
Purchase Documentation	Is Exactly	<input type="text"/>	Add another Purchase Documentation

Toggle here to choose between an exact match, a match that starts with a value (ex. 7C0), or set a range (ex. 7C0001 and 7C0999).

Click "Add Another" to add multiple values.

Purchase Order Search Criteria*

***Not available on the requisition search or may differ as noted**

Owner - the requisition prepared for user is the PO owner unless the PO was imported without a relationship to a requisition and then the owner is specified in the import.

Requisition Identification (Number(s)/Name) - search for PO's with requisition number(s) or name(s). To search multiple requisition numbers, separate each number with a comma: 374747, 918489, 348603.

Receipt Identification (Number(s), Name, Packing Slip Number(s), Tracking Number(s)) – search for PO's identified with receipt information.

Invoice Identification (Invoice Number(s), Invoice Name, Supplier Invoice Number(s)) – search for PO's identified with invoice information.

Supplier Status – select between sent to supplier, cancelled, partially shipped, over shipped, sent/confirmed, no shipments and fully shipped to view status by vendor electronic confirmations.

Receipt Status – select between no receipts, partially received, fully received and over received to view PO's by entered receiving.

Invoice Status – select between no invoices, partially invoiced, fully invoiced and over invoiced to view by e-invoice status.

Matching Status – select between partially matched, fully matched, and no matches to see these various stages of the e-invoicing process.

AP Status – select between open, closed, and soft closed to view by payables processing.

Status Flags – select between with user revisions, with rejected lines, with cancellation, with supplier modifications, requires receipt, with substituted invoice items, with awarded lines, with system revisions, with errors, with backorders, with attachments, with credits, with forced matches and with cancelled receipt items. (This info is generally intended for Payment Services staff).

RFX Status – has lines from an awarded event, this is for contracting.

Invoice Search Criteria*

***Not available on the requisition or purchase order search**

Invoiced By – search invoice by user. If a user manually creates an invoice, that user is the invoiced by user. The invoiced by user may be different from the invoice owner.

Invoice Owner – search invoice by owner. For **PO invoices**, the invoice owner is the same as the PO owner regardless of the invoice source.

Workflow Status – select between pending, rejected and complete to see these various stages of the invoice process.

Matching Status – select between partially matched, fully matched, and no matches to see these various stages of the e-invoicing process.

Invoice Source – select between manual, electronic, supplier portal and supplies manager, to see these types e-invoices. Currently, the University only uses electronic and supplier portal invoice methods.

Invoice Type – select between PO invoice, non-PO invoice, PO credit memo and non-PO credit memo to narrow search by type of invoice. (This info is generally intended for Payment Services staff).

Payment Status – select between in process, payable, paid, and cancelled to see these various payment statuses of the e-invoicing process.

Status Flags – select between with errors, with forced matches, has substitute items, has non-PO lines, pending auto-match, with attachments and with retainage to see these various flags for invoices. (This info is generally intended for Payment Services staff).

Receipt Search Criteria*

*Not available on the requisition, purchase order, or invoice search

Receipt Type – select between quantity and cost to see these various types of receipts that can be created. Quantity receipts tend to be for goods while cost receipts tend to be for services.

Receipt Source – select between manual and imported to see receipts by origin.

Receipt Flags – select to search with forced matches.

Refining Your Search

Once the information has been queried, the document search feature allows you to further refine your search.

The screenshot displays a web-based search interface for receipts. At the top left, there are buttons for 'start new search' and 'edit search'. Below these, a 'Filtered By' section shows filters for Type (Requisition), Date Type (Submit Date), and Date Range (Fiscal Year-To-Date). To the right of these filters are 'Save Search' and 'Export Search' buttons. A 'Refine Search Results' section on the left allows further filtering by Type (Requisition), Date Range (Fiscal Year-To-Date), Current Workflow Step (listing various banner buyers and approvals), Approved By (listing names like Shawn Olbeter), Supplier (listing various companies), and Business Unit. The main area shows search results for 'Showing 1 - 500 of 9911+ results' with a total result count of 20561. The results are sorted by 'Best match' and show columns for Requisition No., Supplier(s), Requisition Name, and a user icon. The results list various requisitions from Summus Staples, The Council for the Study of Community Colleges, and others, with details on dates and names.

1. You may start a new search or edit the search by clicking the appropriate button at the upper-left corner of the screen.
2. You may save the search if you need to have the information regularly.
3. You may export the search to another format (Excel). Your options for the export are a screen export (shows exactly what is on the screen), a transaction export (which provides details of the transaction) and a full export (has all information on various worksheets).
4. You may also refine the search further with easy, one-step filters. With each of these, just click on the value you want to refine the search.
5. Current Workflow Step
 - a. Approved By
 - b. Supplier
 - c. Business Unit
 - d. Custom Fields
 - e. Department
 - f. Workflow Status

- g. Prepared By
- h. Prepared For
- i. Form Type
- j. Status Flags
- k. Product Flags

Filtered By
Type: Purchase Order
Date Type: Creation Date (System)
Date Range: All Dates

Save Search
Export Search

⚠ Export is unavailable when total results exceed 50000

Refine Search Results
Type
Purchase Order ▼
Date Range
All Dates ▼

⚠ Document counts are unavailable for total results over 10000

Current Workflow Step
Purchase Order Create
PO Distribution
PO Export
PO Update

Each of these is a filter. Click on the item to filter that value.

Current Workflow Step

Click on the filter button to filter more than one value.

Open
Closed

Filtered By
Type: Purchase Order
Date Type: Creation Date (System)
Date Range: All Dates
[remove all]

Current Workflow Step
☒ Purchase Order Create
Save Search

Refine Search Results
Type

Results per page 500 ▼
PO No

TB296848

TB296659

TB296480

TB296600

Uncheck the box to remove a filter

Other important information

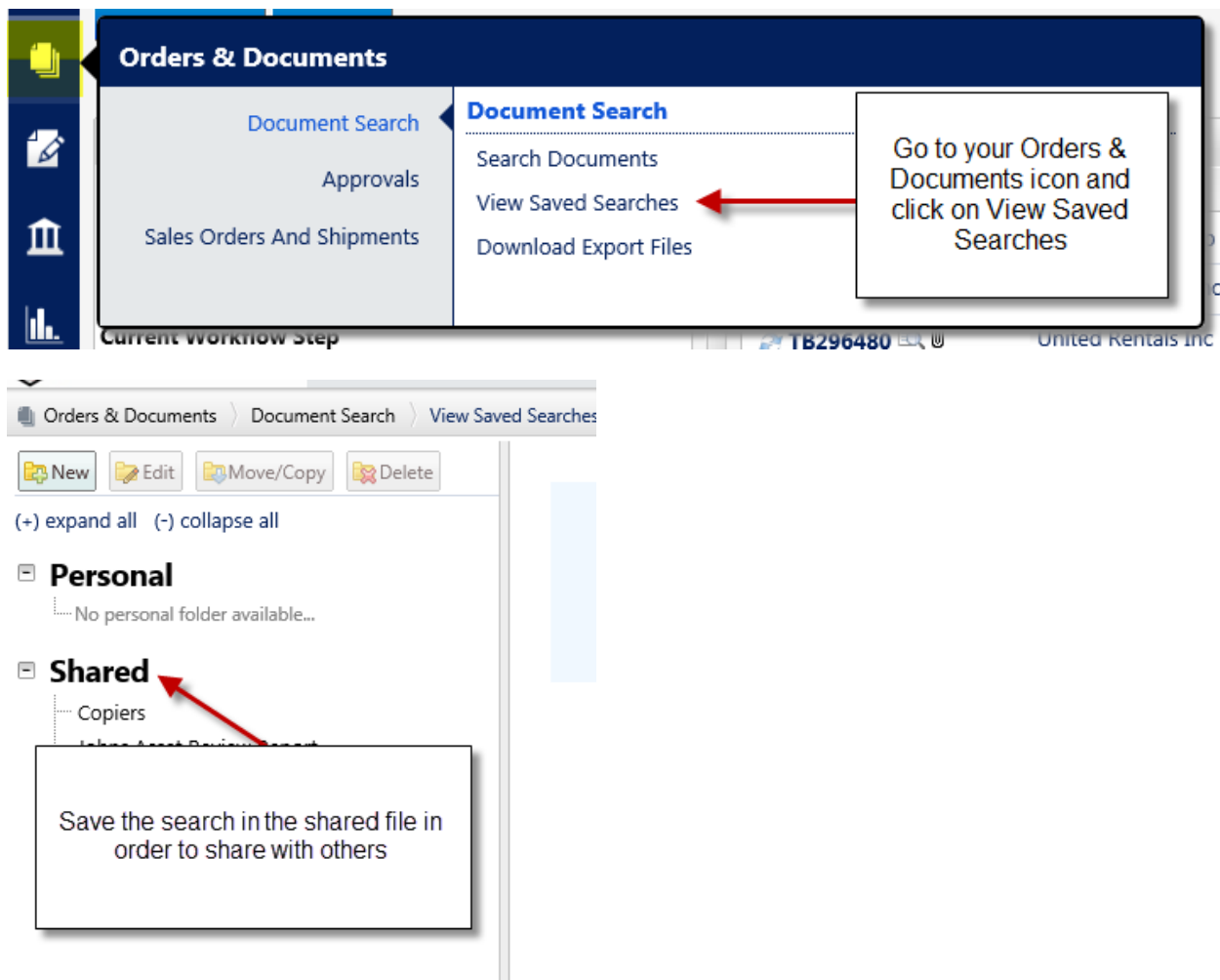
Document Search allows you to perform a search across all applicable document types (*Requisition, Purchase Order, Invoice, Receipt, & Sales Order*). Prior to 12.1, you could export data for a specific type of document. Now, a user can export by “All Documents.”

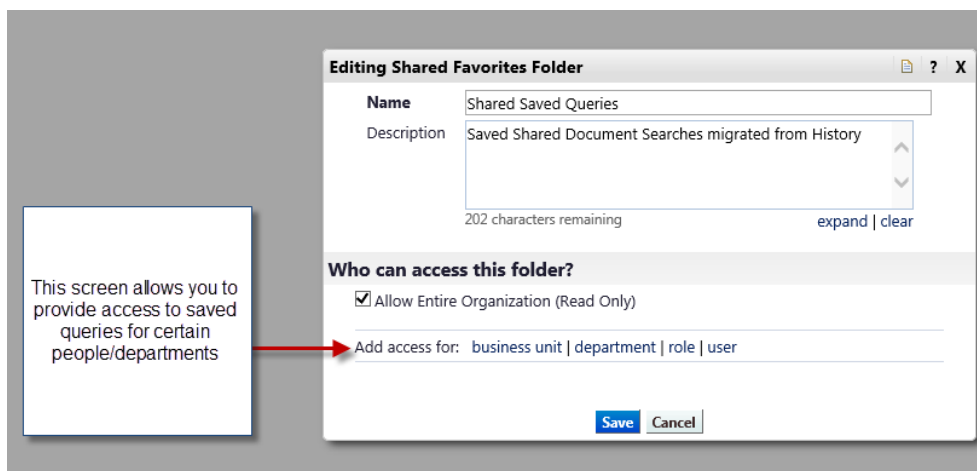
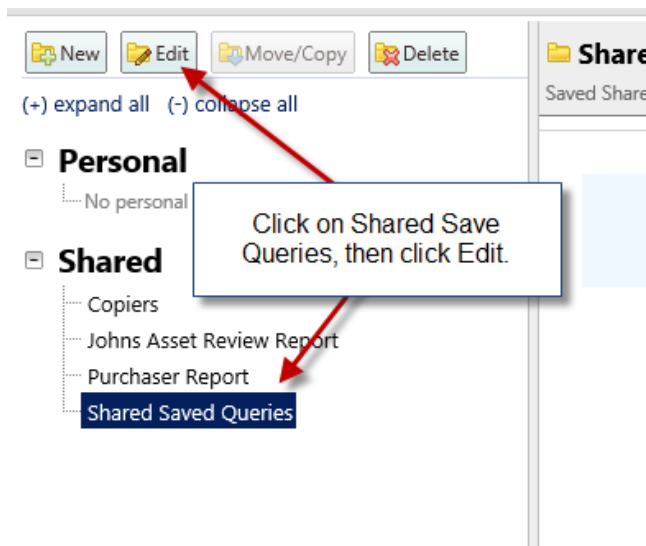
For example, if you do an all documents search on a PO number you will get returned to you all of the documents related to that PO. That could be requisitions, invoices, as well as receipts. You can now export this group of documents in a single file.

Note: Exports will only be allowed for results of 50,000 or less matches.

Sharing Searches

Users can also now share saved searches. For example, if a department head asks how many POs their department had last month, you can create the search for them and share it with them. This gives them the ability to run it at any time and get their data on demand.



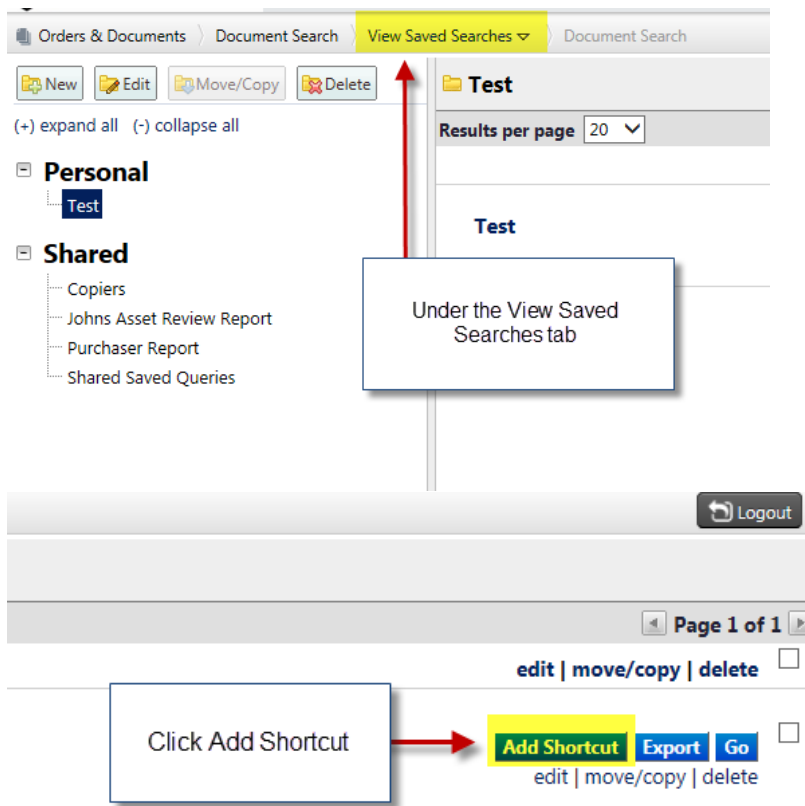


Users often run the same type of search frequently. For example, someone in Payment Services may search by invoice, whereas a shopper may search by supplier. Document Search now will remember where you initiated your last search from. After running a search, the next time you click the Document Search tab you will immediately be taken to the same page from which you last ran a search.

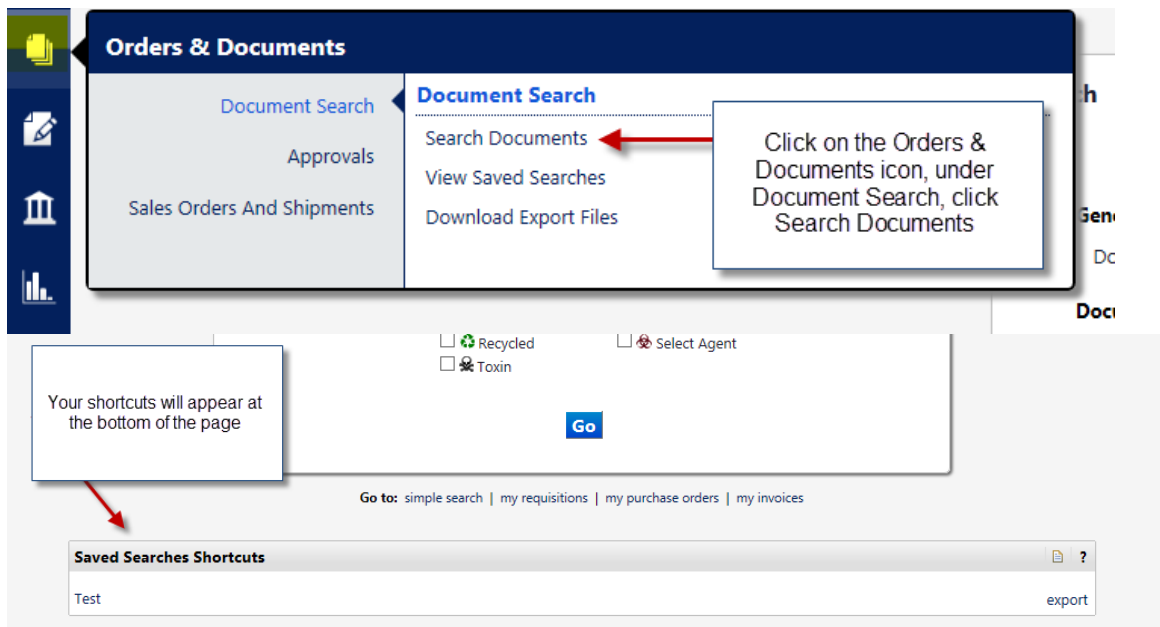
For example, if a buyer in purchasing is always looking up requisitions from the Document Search advanced search page, the next time they click Document Search; it will take them to the requisition advanced search page. This saves the user several clicks by taking them to the last page they ran a search from. If they wish to go to another page there are links available to take them to other document types and/or to the simple or advanced search pages.

Creating Shortcuts to Shared Searches

The end user can create a shortcut to the favorite searches as well



The shortcut link will appear under the main search page.



End of Training Guide for Document Search