

TUmarketplace Document Search Update

August 2020

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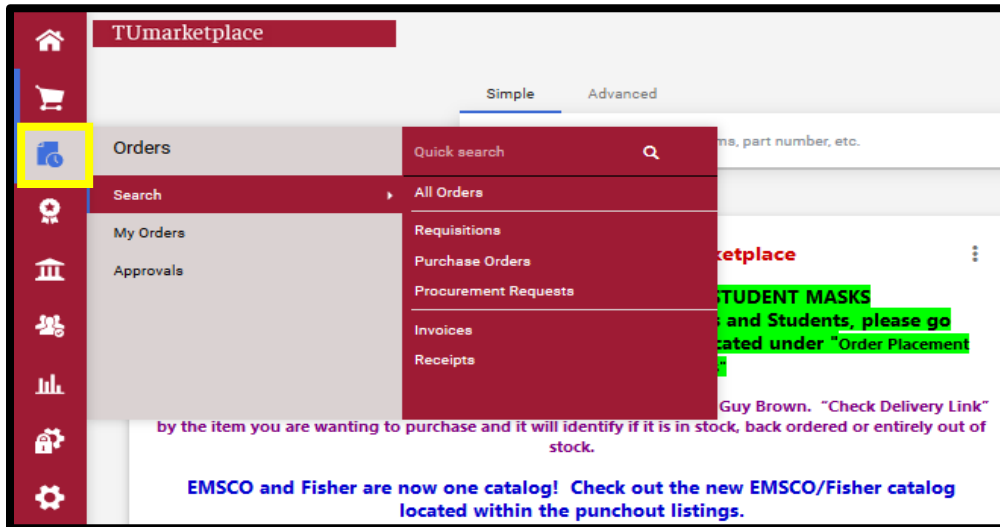
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Introduction

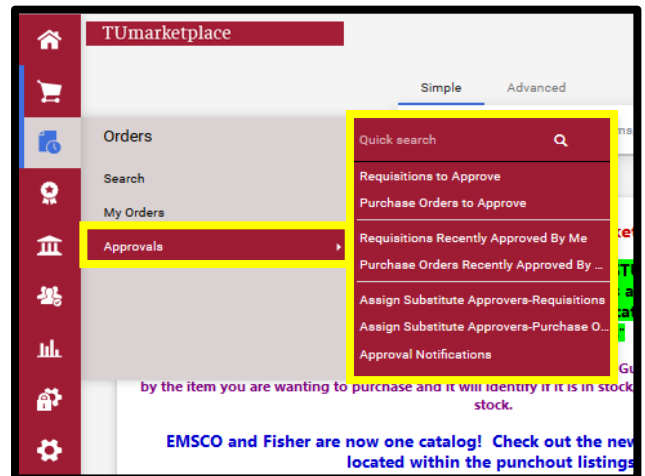
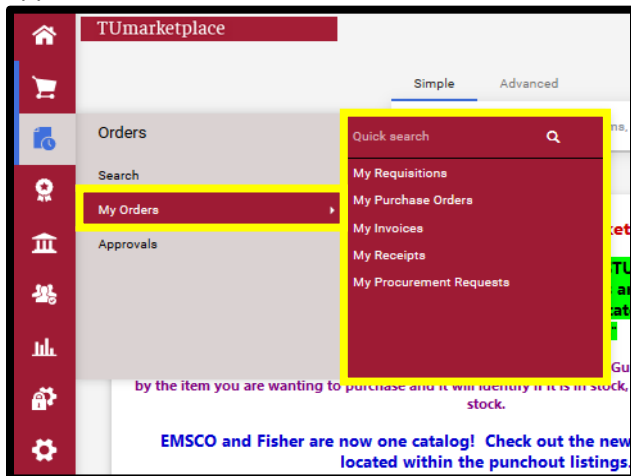
Jaggaer has updated the document search experience. This change will be in place starting the week of August 10, 2020; users will not have the option to opt out of the new search experience. This document explains how the new search works. Users can also view an [instructional video](#) released by Jaggaer.

Using the New Document Search

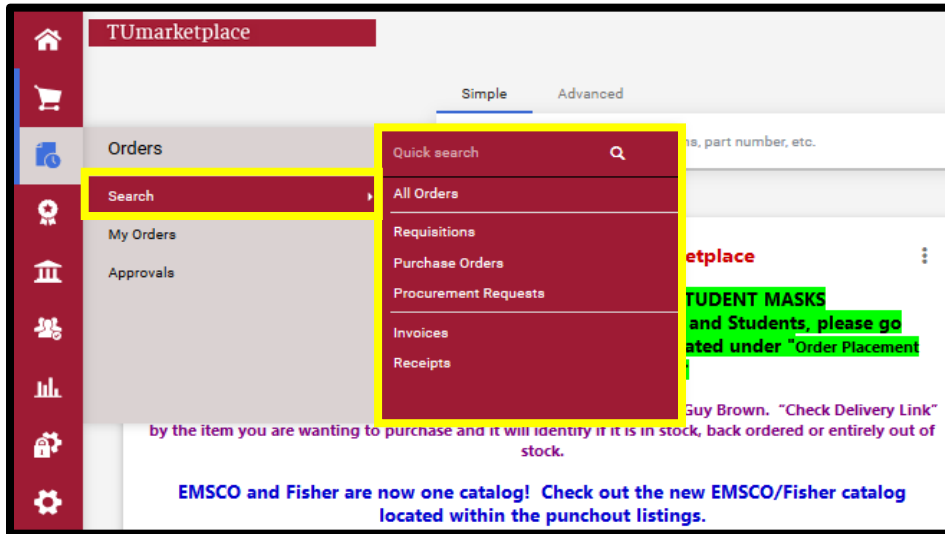
To navigate to the order search page, hover over the “Orders” icon at the left of the TUmartplace page:



Note that in addition to searching all orders, users can specifically search their own orders and their approvals:



This guide will focus on searching all orders:



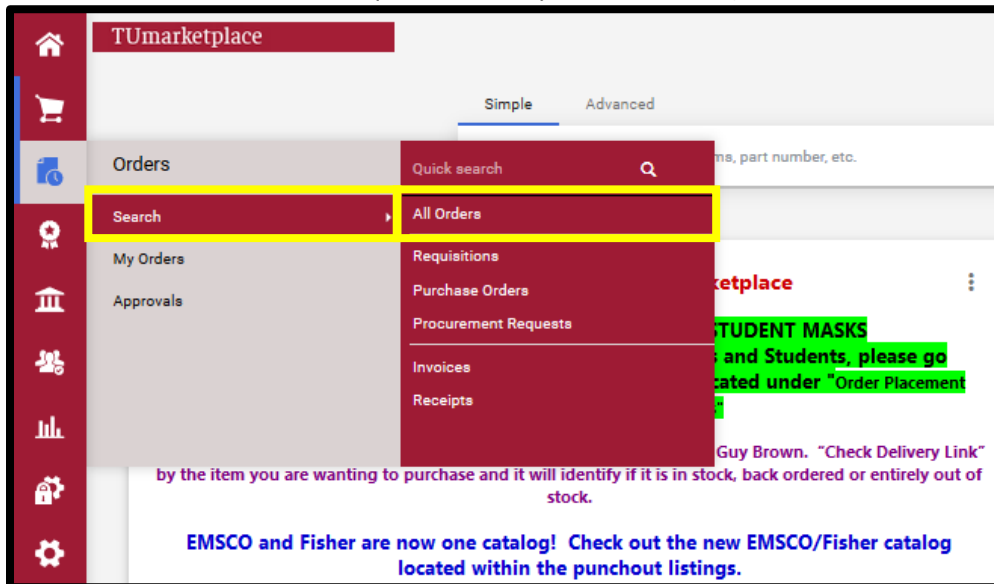
The search interface update impacts the following features:

- Searches and filters
- Displaying search results
- Exporting searches data

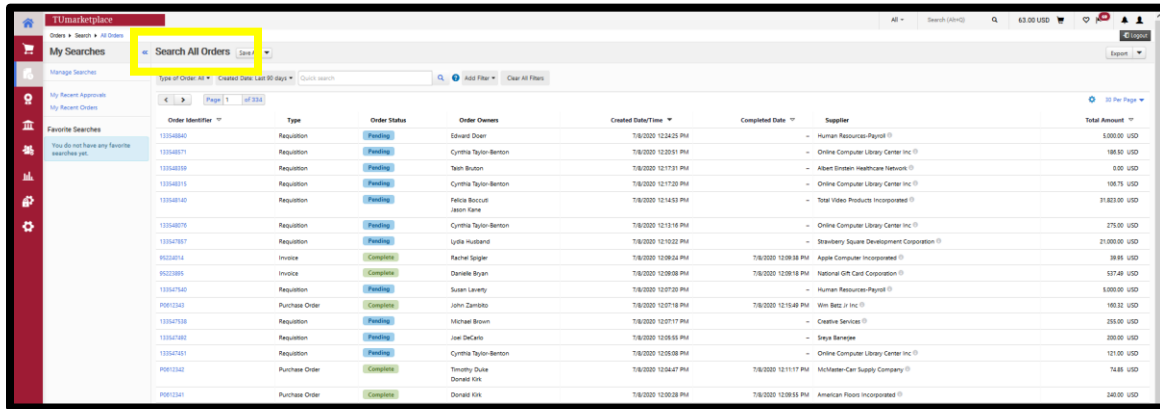
The following sections explore each of these features.

Searches & Filters

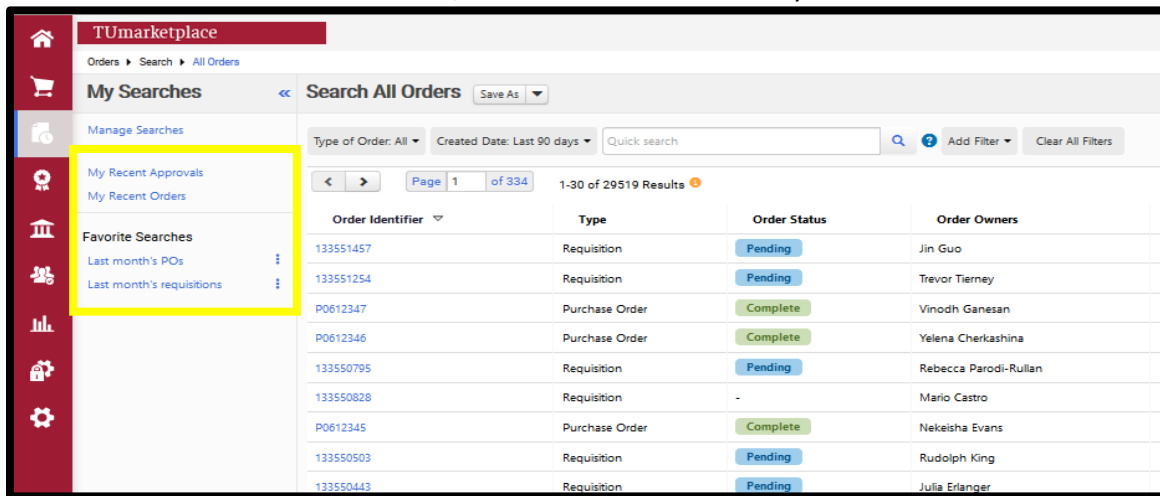
To search all orders, select the “All Orders” option (but note that users can opt to search certain types of documents instead, such as requisitions and purchase orders):



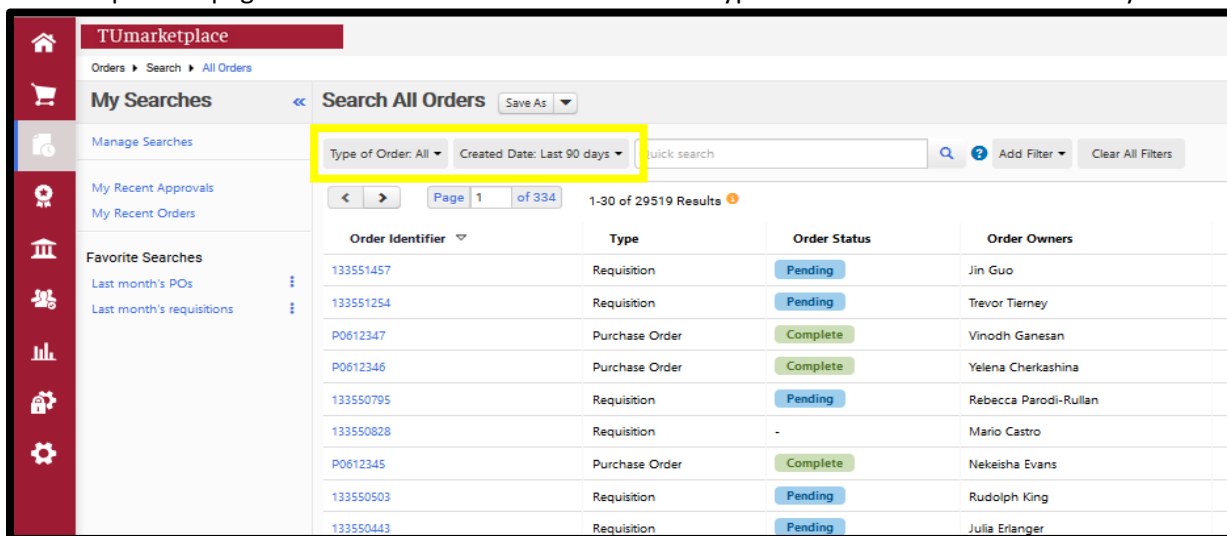
This will take the user to the “Search All Orders” page:



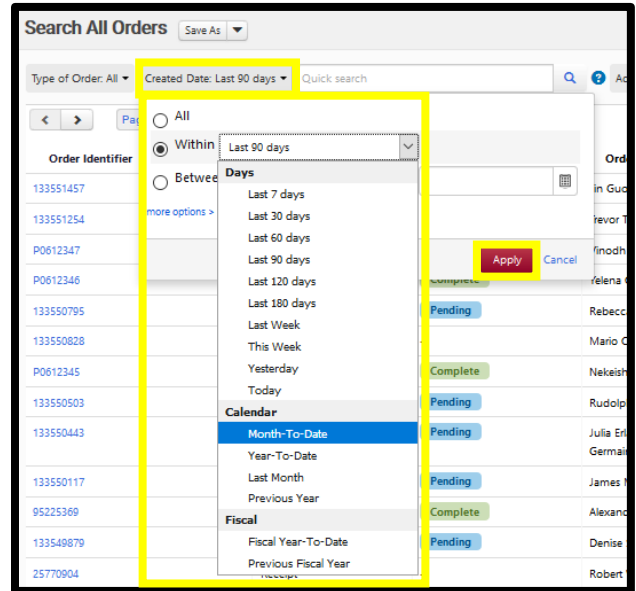
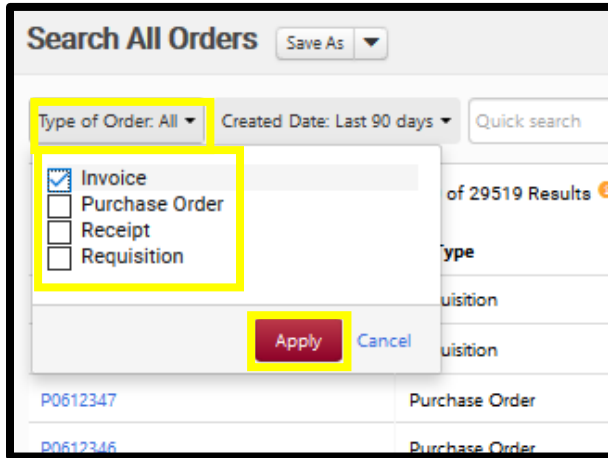
On the left side of the screen, there are quick links to “My Recent Approvals” and “My Recent Orders”, as well as links to “Favorite Searches”, which are searches saved by the user:



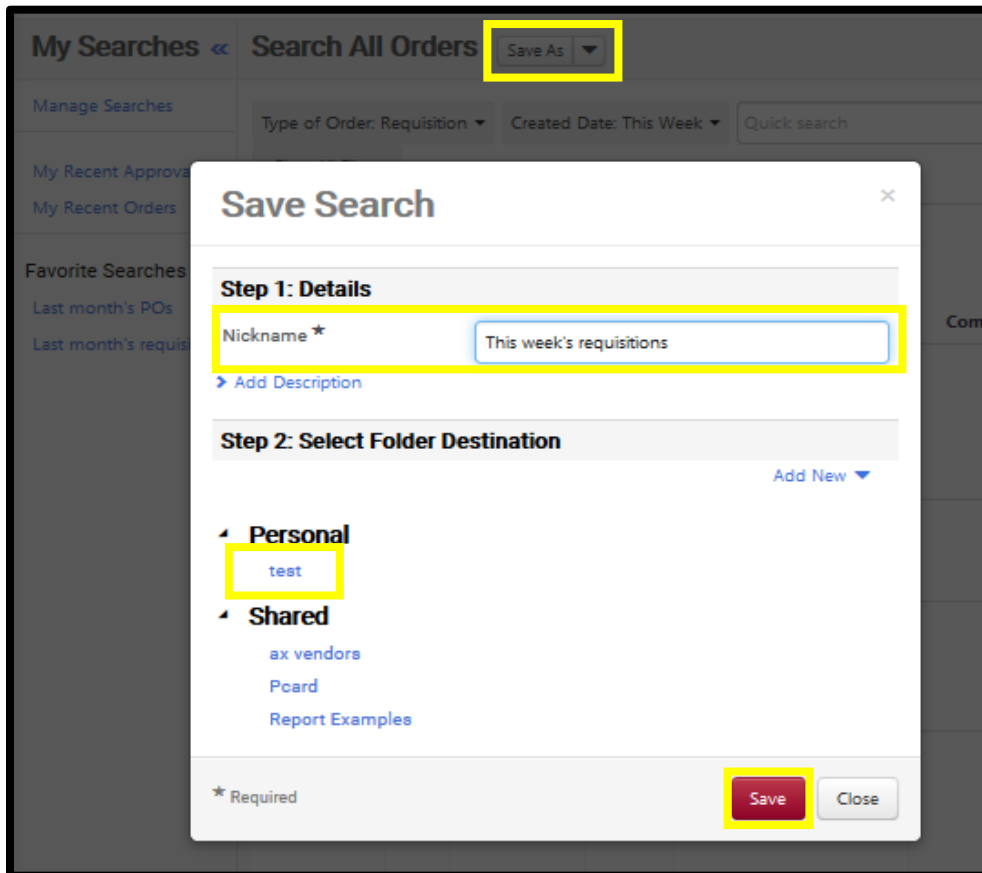
At the top of the page are default search filters – all orders types created within the last 90 days:



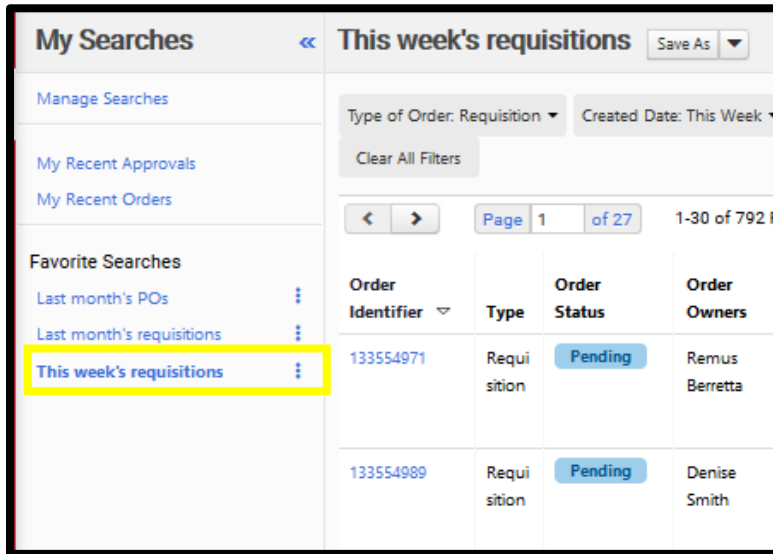
These filters can be modified by selecting from the dropdown lists and clicking “Apply” (note that creating broader search parameters, such as by choosing to search all dates, may result in the search taking longer to generate results):



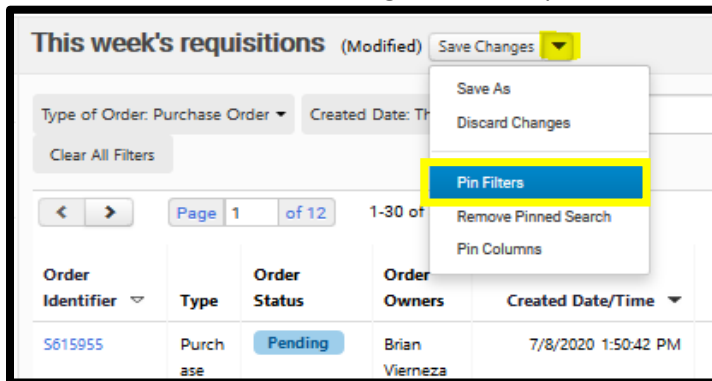
Users can choose to save their searches by clicking on the “Save As” button at the top of the screen. Users must name the search and choose a destination folder, and then click “Save”:



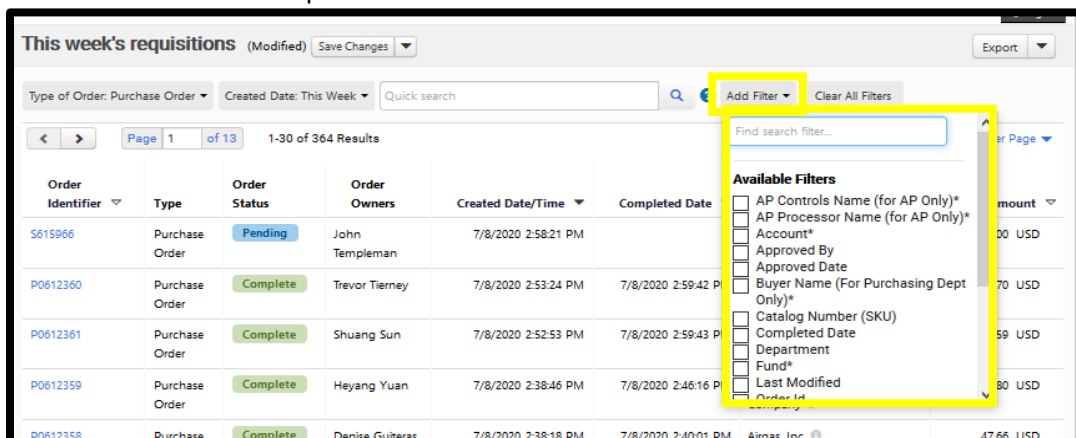
The search will then be saved under “Favorite Searches” at the left of the screen:



Users can also modify the default filters so that whenever they come to the “Search All Orders” page, the filters are already set to their desired parameters. To do so, set the filters as desired, click on the down arrow next to “Save Changes” at the top of the screen, and then click “Pin Filters”:



In addition to the “Type of Order” and “Created Date” filters, users can add additional filters by selecting from the “Add Filter” drop down:



The added filters will appear above the search results:

This week's requisitions (Modified) Save Changes

Type of Order: Purchase Order Created Date: This Week Quick search Add Filter Clear All Filters

Approved Date: Last 7 days

1-3 of 3 Results

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
P0612228	Purchase Order	Complete	Marc Graver Germaine Calicat	7/7/2020 10:34:56 AM	7/7/2020 1:46:22 PM	Geoffrey M. Bove
P0612229	Purchase Order	Complete	Robert Mccabe	7/6/2020 12:23:07 PM	7/7/2020 1:50:23 PM	Johnson Controls Incorporated
P0612227	Purchase Order	Complete	Robert Mccabe	7/6/2020 11:50:59 AM	7/7/2020 1:50:22 PM	A&S Sprinkler Co Inc

To modify individual filters, click the down arrow and make the desired changes. To remove the filter, click the x:

This week's requisitions (Modified) Save Changes

Type of Order: Purchase Order Created Date: This Week Quick search Add Filter Clear All Filters

Approved Date: Last 7 days

All
 Within Last 7 days
 Between and
[more options >](#)

Apply Cancel

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
P0612228	Purchase Order	Complete	Marc Graver Germaine Calicat	7/7/2020 10:34:56 AM	7/7/2020 1:46:22 PM	Geoffrey M. Bove
P0612229	Purchase Order	Complete	Robert Mccabe	7/6/2020 12:23:07 PM	7/7/2020 1:50:23 PM	Johnson Controls Incorporated
P0612227	Purchase Order	Complete	Robert Mccabe	7/6/2020 11:50:59 AM	7/7/2020 1:50:22 PM	A&S Sprinkler Co Inc

To remove all filters, select "Clear All Filters" at the top of the screen; this will set the parameters to all order types in the last 90 days:

This week's requisitions (Modified) Save Changes

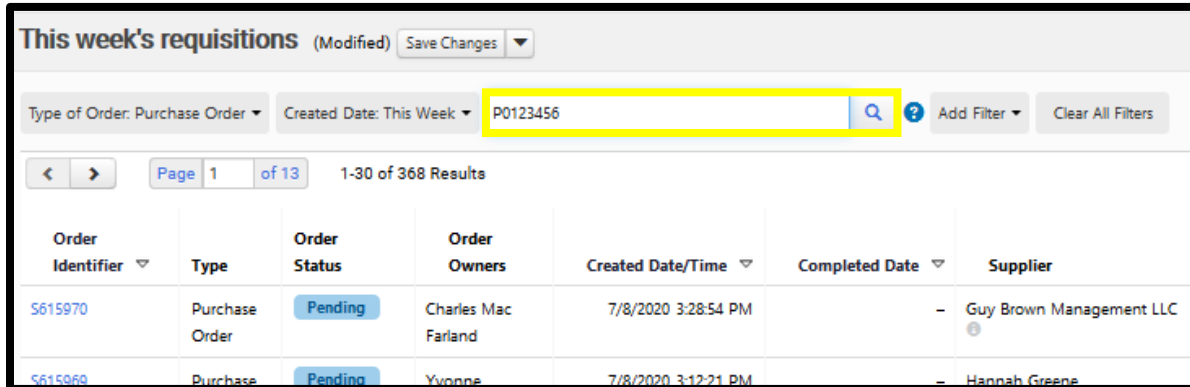
Type of Order: Purchase Order Created Date: This Week Quick search Add Filter Clear All Filters

Approved Date: Last 7 days

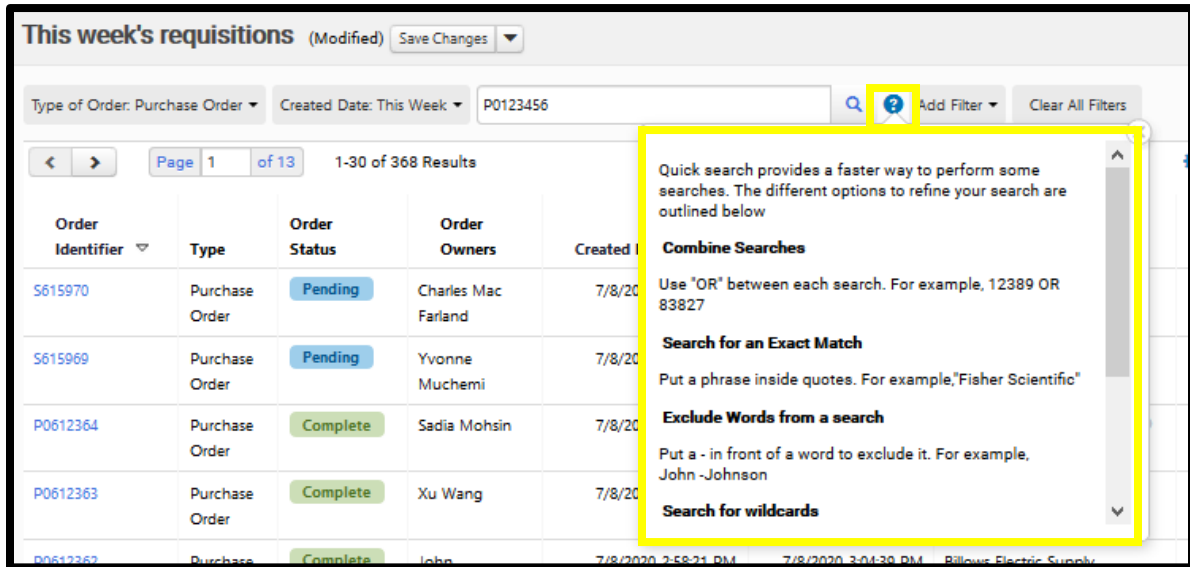
1-3 of 3 Results

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier
P0612228	Purchase Order	Complete	Marc Graver Germaine Calicat	7/7/2020 10:34:56 AM	7/7/2020 1:46:22 PM	Geoffrey M. Bove
P0612229	Purchase Order	Complete	Robert Mccabe	7/6/2020 12:23:07 PM	7/7/2020 1:50:23 PM	Johnson Controls Incorporated
P0612227	Purchase Order	Complete	Robert Mccabe	7/6/2020 11:50:59 AM	7/7/2020 1:50:22 PM	A&S Sprinkler Co Inc

Type in the “Quick Search” bar to search according to various types of document elements, such as by requisition or purchase order number, supplier name, or product description:

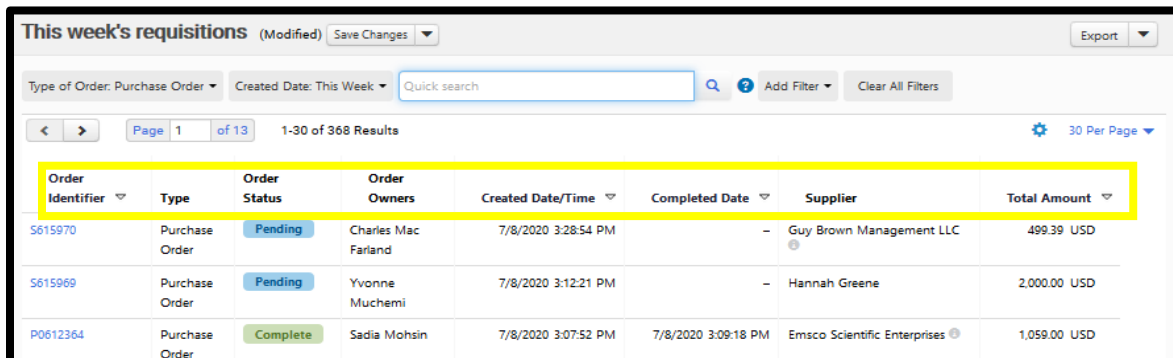


The question mark to the right of the “Quick Search” bar provides useful search tips (see Appendix A):



Displaying Search Results

The search results have default column headers:



To modify those column headers, click on the gear icon at the top right:

This week's requisitions (Modified) Save Changes

Type of Order: Purchase Order Created Date: This Week Quick search Add Filter Clear All Filters

Page 1 of 13 1-30 of 368 Results 30 Per Page

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
S615970	Purchase Order	Pending	Charles Mac Farland	7/8/2020 3:28:54 PM	-	Guy Brown Management LLC	499.39 USD
S615969	Purchase Order	Pending	Yvonne Muchemi	7/8/2020 3:12:21 PM	-	Hannah Greene	2,000.00 USD
P0612364	Purchase Order	Complete	Sadia Mohsin	7/8/2020 3:07:52 PM	7/8/2020 3:09:18 PM	Emsco Scientific Enterprises	1,059.00 USD

Doing so will bring up the "Configure Column Display" screen. The screen displays the available columns in a list at the left. You can search for available columns by typing in the search bar, and check or uncheck the columns you wish to display. The screen also displays the current columns in a list to the right. You can reorder them by dragging them or by clicking the up or down arrows, and you can remove a column by clicking on the trash can icon:

Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

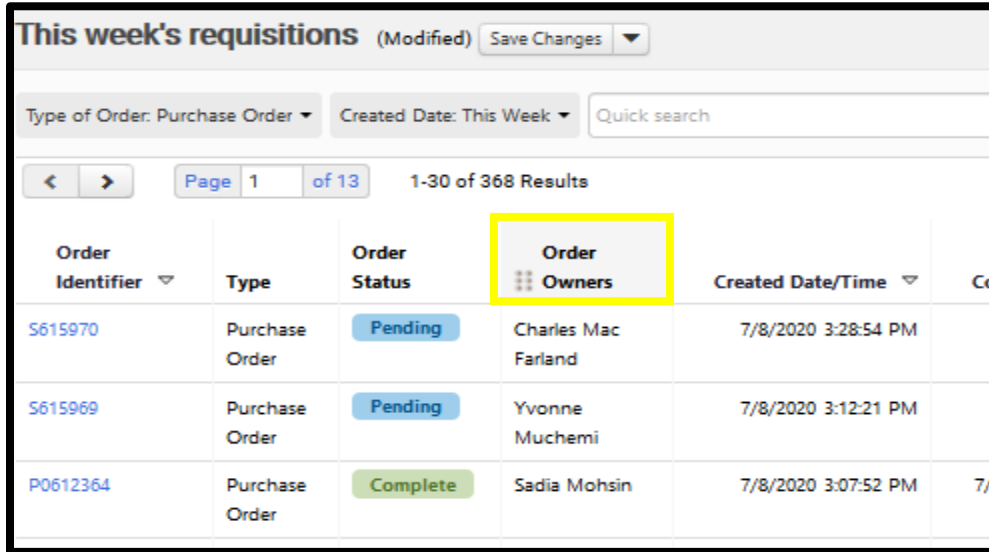
Type to Filter Available Columns... Pin Columns as my defaults

<input type="checkbox"/> Account *
<input type="checkbox"/> ACH Override *
<input type="checkbox"/> Activity *
<input type="checkbox"/> AP Controls Name (for AP Only) *
<input type="checkbox"/> AP Processor Name (for AP Only) *
<input type="checkbox"/> Approval Actions
<input type="checkbox"/> Approval Steps
<input type="checkbox"/> Buyer Name (For Purchasing Dept Only) *
<input type="checkbox"/> Chart *
<input type="checkbox"/> Close PR? *

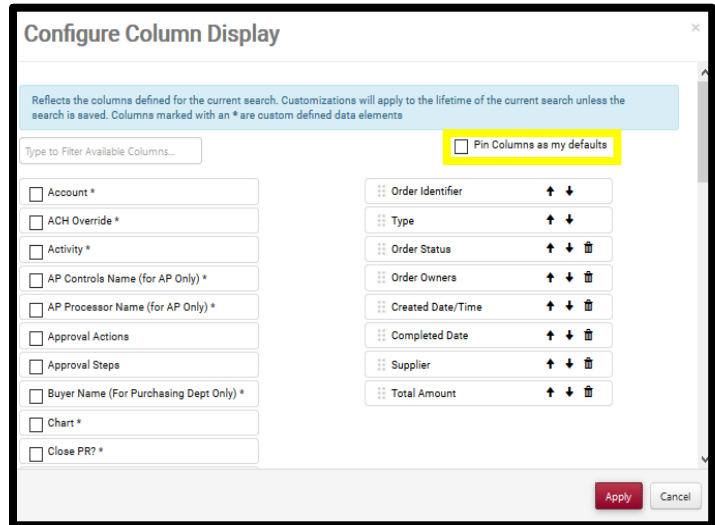
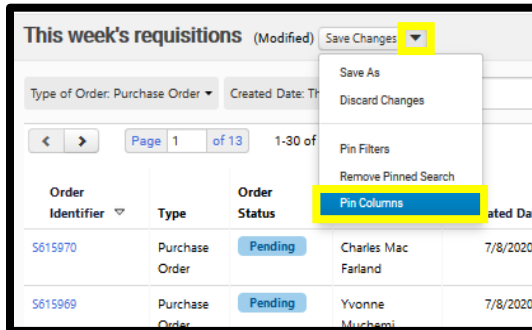
<input type="checkbox"/> Order Identifier ↑ ↓
<input type="checkbox"/> Type ↑ ↓
<input type="checkbox"/> Order Status ↑ ↓ 🗑️
<input type="checkbox"/> Order Owners ↑ ↓ 🗑️
<input type="checkbox"/> Created Date/Time ↑ ↓ 🗑️
<input type="checkbox"/> Completed Date ↑ ↓ 🗑️
<input type="checkbox"/> Supplier ↑ ↓ 🗑️
<input type="checkbox"/> Total Amount ↑ ↓ 🗑️

Apply Cancel

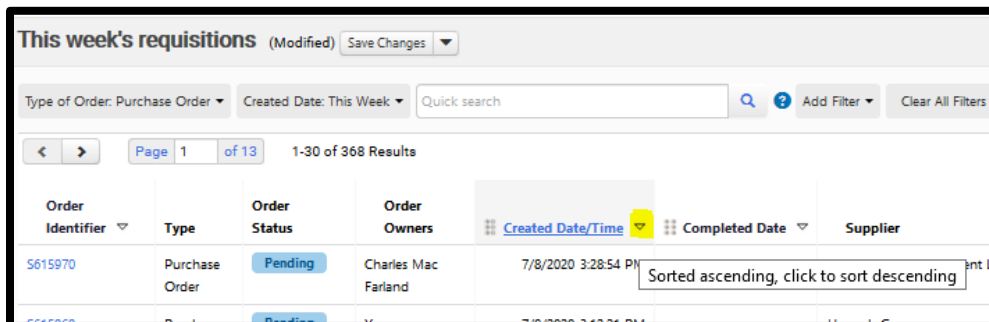
You can also change the column order on the results list directly, by dragging them to rearrange. Hover over the column name until the six dots appear, then drag the column to the desired location:



Users can pin their column changes in order to have their modifications be the default display, either via the "Save As" button at the top of the screen, or by checking the "Pin Columns as my defaults" on the "Configure Column Display" screen:

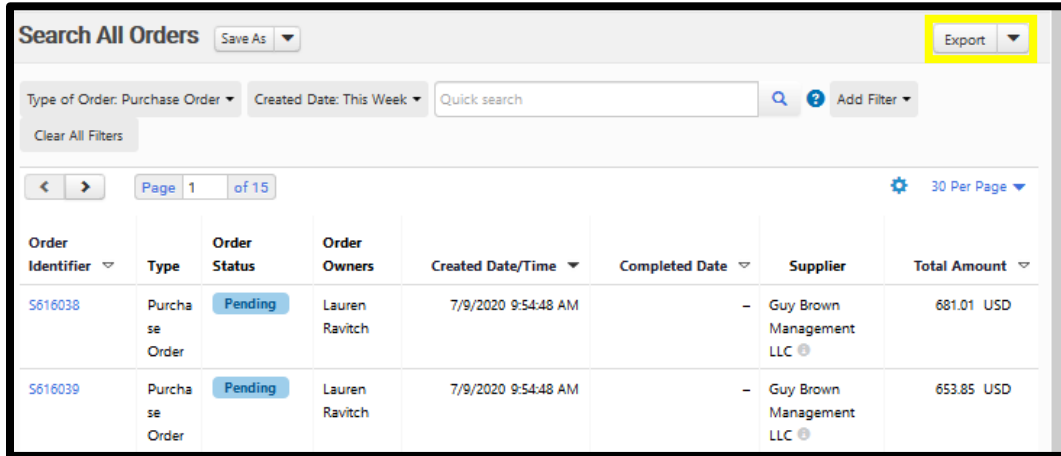


Sortable columns have an arrow next to their column title – click the arrow to sort by that field:

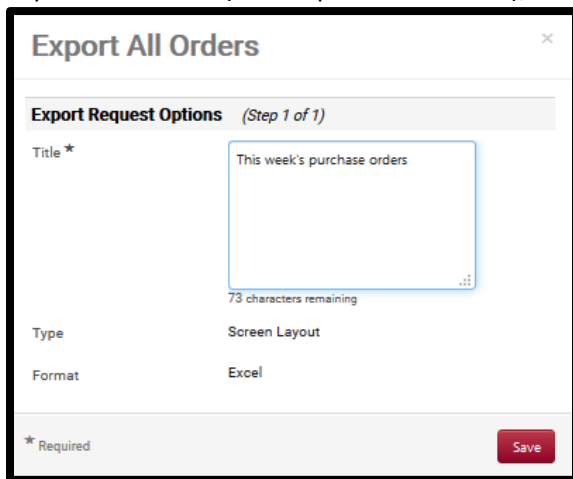


Exporting Search Data

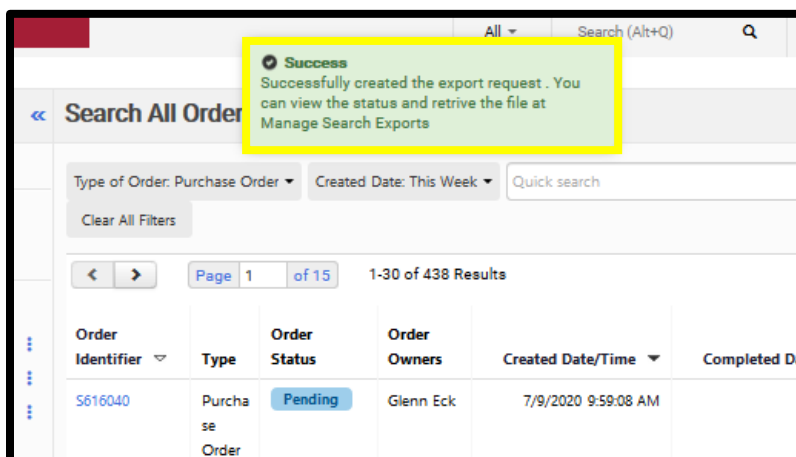
To export the results of the search, click on “Export” at the top right:

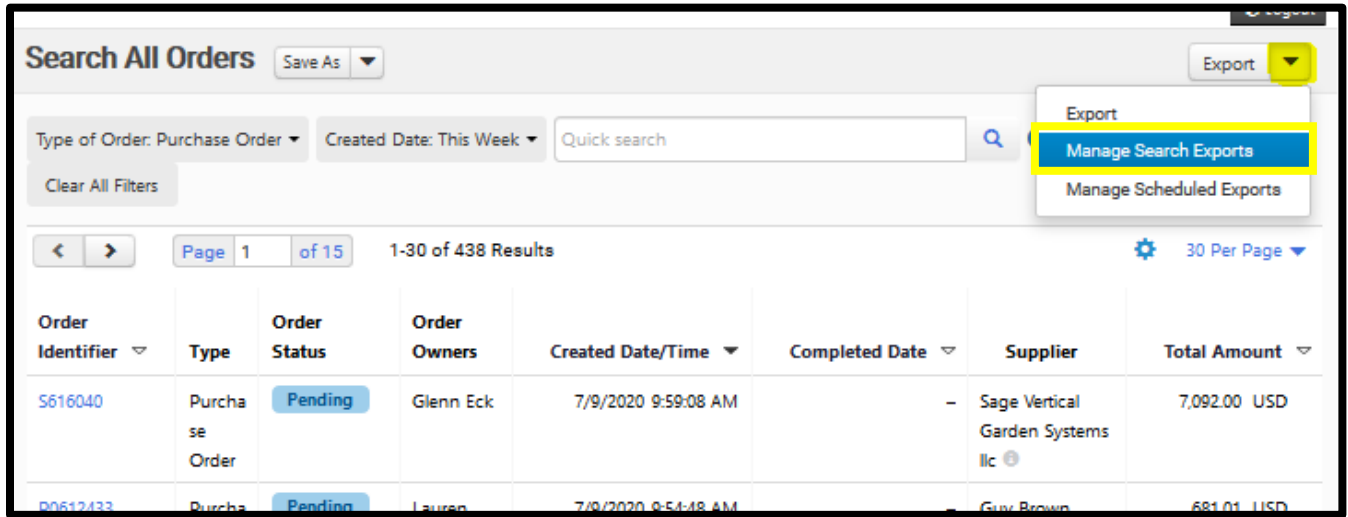


This will bring up the export screen. Input a title for the export, indicate the layout type and select the export file format (if multiple are available), and then select “Save”:

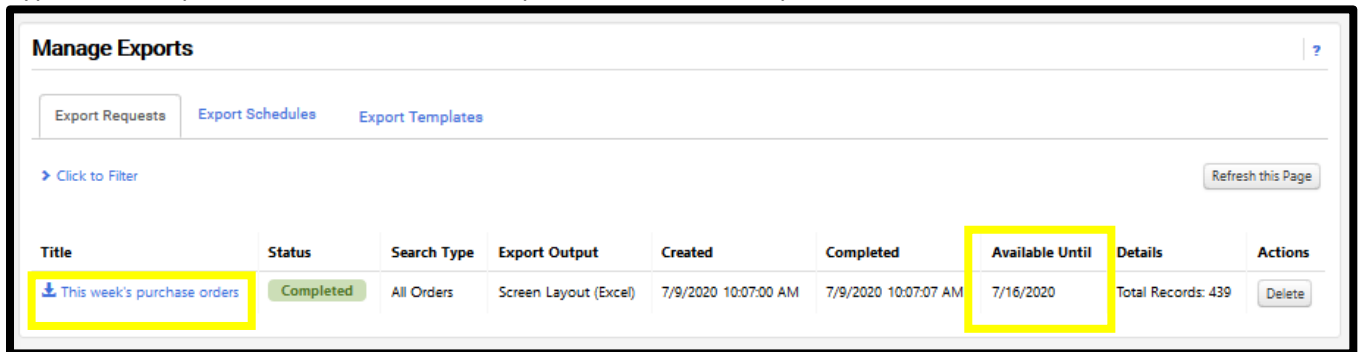


A link to your export will flash at the top of the page, or you can navigate to your export via the “Export” button:



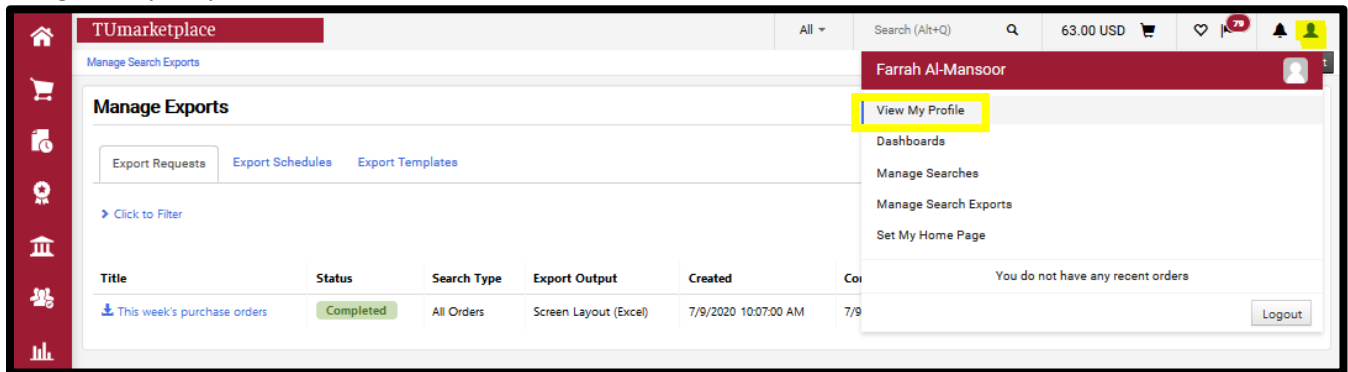


Your export will be listed on the “Export Requests” tab of the “Manage Exports” page. Click on the hyperlinked export title to download the report. Note that the report will be available for a limited time:

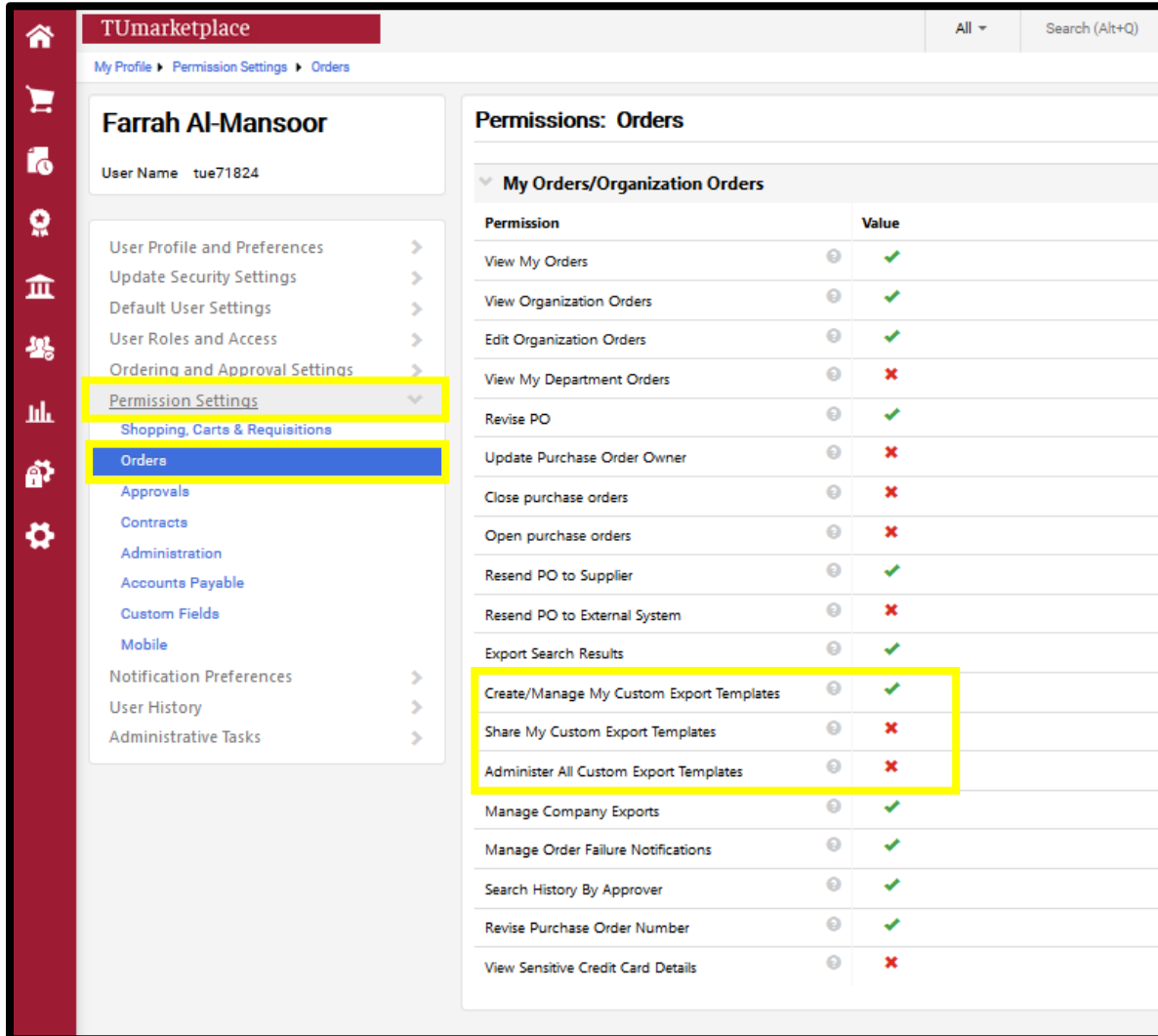


Custom Export Templates

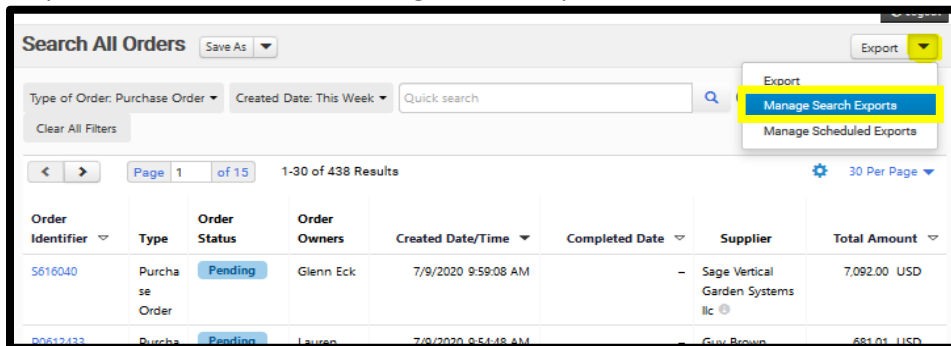
Users can create export templates if they have the necessary permissions. To check your permissions, navigate to your profile:



Click on “Permission Settings”, then “Orders”. Review your permission settings related to export templates:

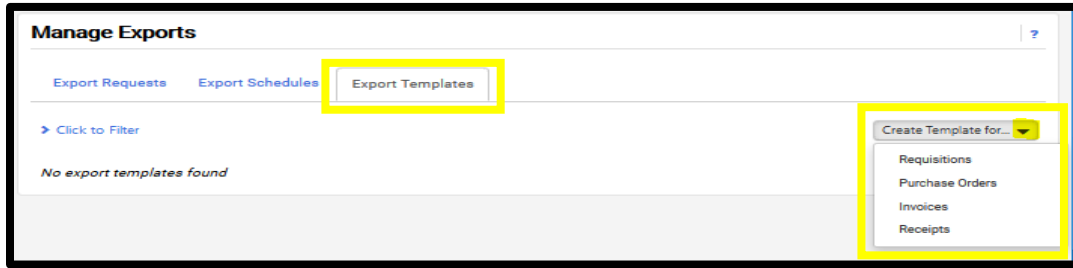


To create an export template, from the “Search All Orders” page, click on the down arrow next to the “Export” button and select “Manage Search Exports”:

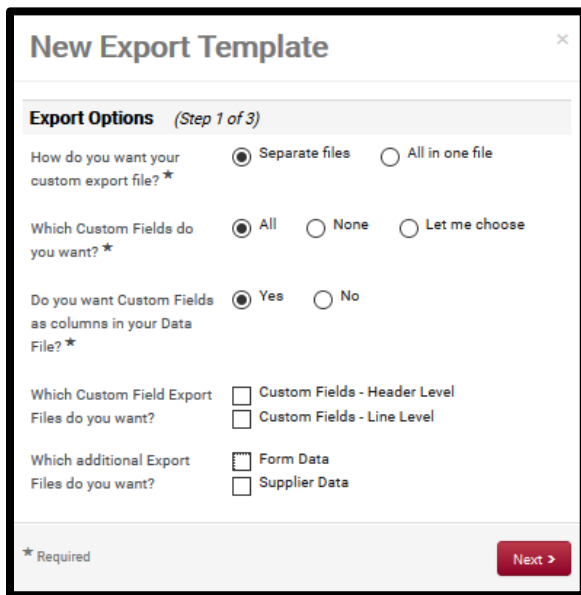


The “Manage Exports” page will load. Note that it has three tabs: “Export Requests” – these are the exports you have requested ([discussed above](#)); “Export Schedules” – these are exports you have

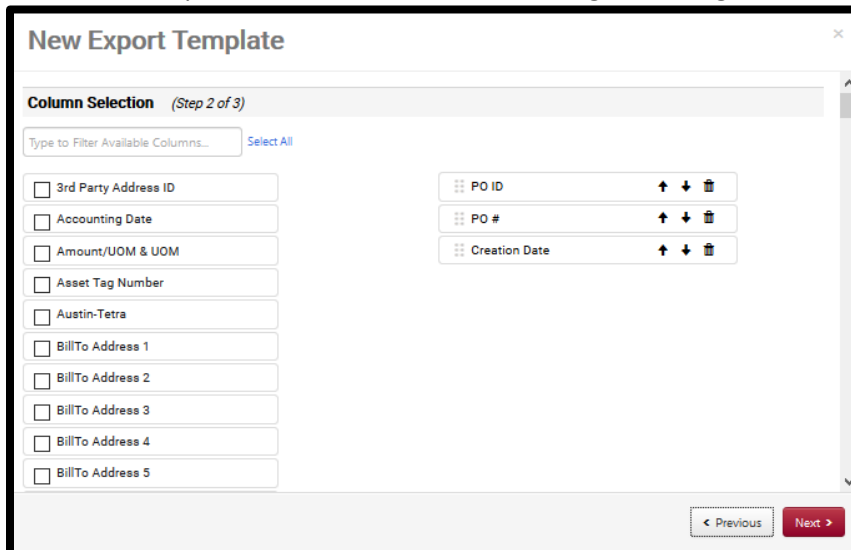
scheduled to run ([see below](#)); and “Export Templates”. Select “Export Templates”. Export templates must be created for a given document type. Select the desired document type for your template from the “Create Template for...” dropdown:



The “New Export Template” screen appears. The first step is selecting the export options. Make your selections and then click “Next”:



The second step is to select columns. After adding, removing, and/or rearranging columns, click “Next”:



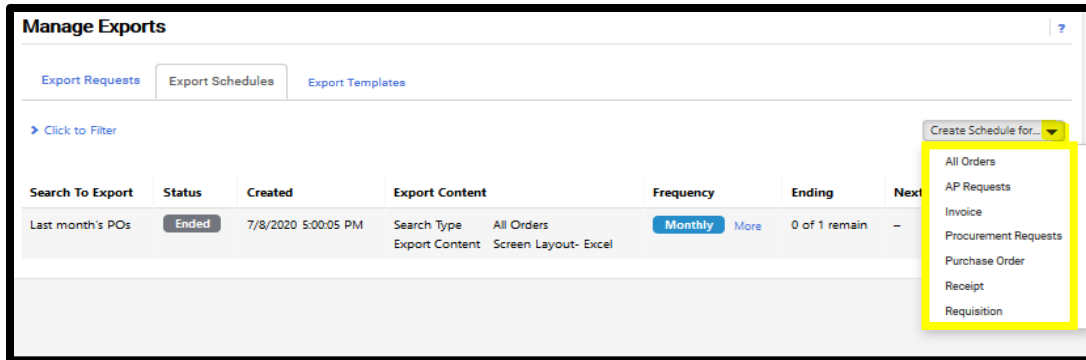
The final step is to provide the template properties. After doing so, click “Submit”:

The template will then appear on the export page:

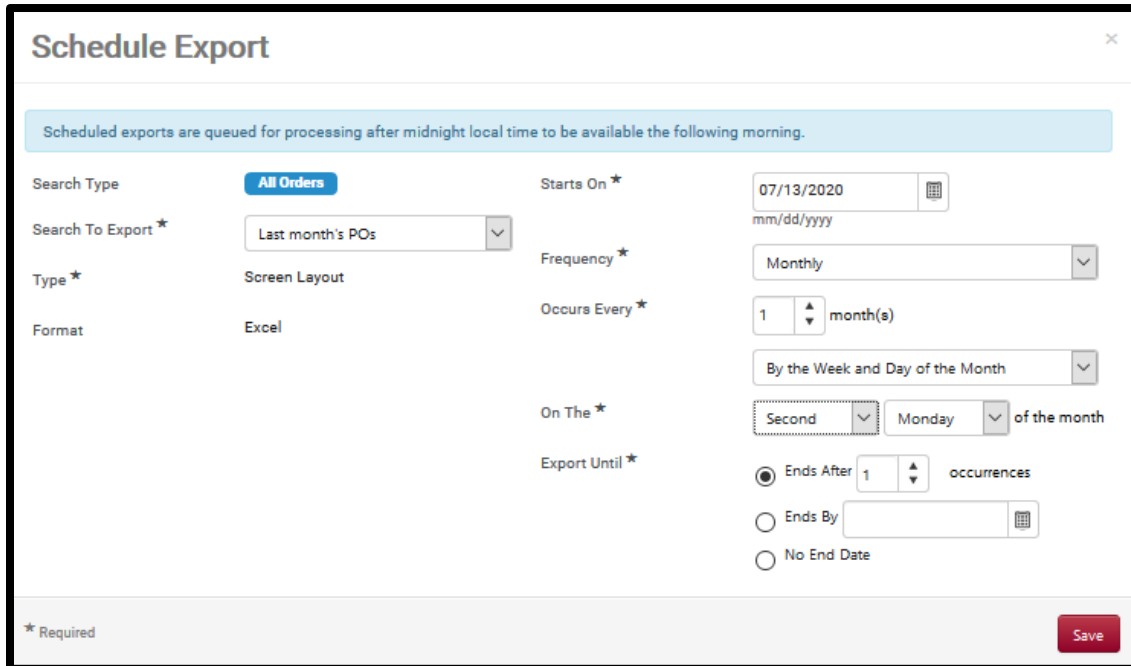
Scheduling Search Exports

To schedule exports, you must have created a saved search for the desired document type. Navigate to the “Export Schedules” tab on the “Manage Exports” page, and click on “Create Schedule for”, then choose the document type for which you wish to schedule the search:

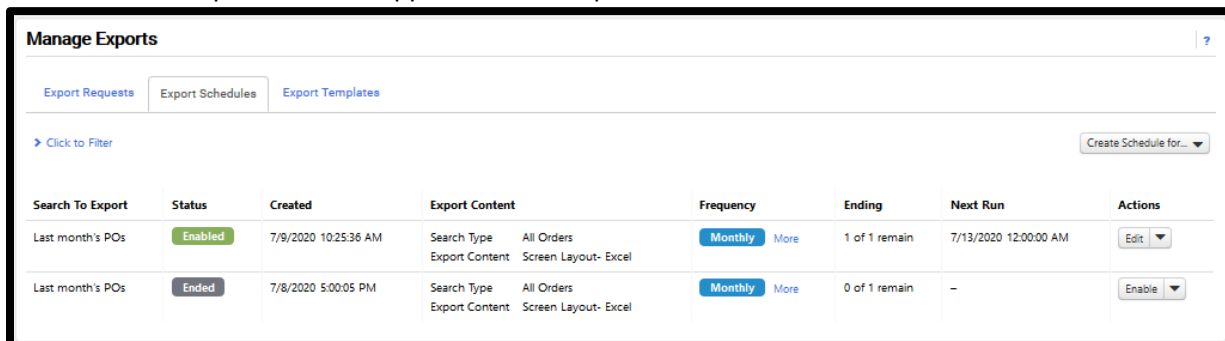
Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
S616057	Purchase Order	Pending	Emma Fitzsimons	7/9/2020 10:14:14 AM		Sigma Aldrich Incorporated	109.00 USD



Customize your scheduled export on the “Schedule Export” screen. If you have created a custom template applicable to the given document type, it will appear as an option here. Note that the available searches to export will depend on the search type chosen in the previous step. When you have finished selecting your options, click “Save”:



The scheduled export will then appear on the “Export Schedules” tab:



They will be queued for processing after midnight on the days that they run and will appear on the "Export Requests" tab once they have finished running. Click on the hyperlinked export title to download the export. Note that they will available for download for a limited time:

The screenshot shows the 'Manage Exports' interface. At the top, there are three tabs: 'Export Requests' (highlighted in yellow), 'Export Schedules', and 'Export Templates'. Below the tabs, there is a 'Click to Filter' link and a 'Refresh this Page' button. The main content is a table with the following columns: Title, Status, Search Type, Export Output, Created, Completed, Available Until, Details, and Actions. Two rows of data are shown, both with a 'Completed' status and an 'Available Until' date of 7/16/2020. The first row is for 'Export request for All Orders' with 464 total records. The second row is for 'This week's purchase orders' with 439 total records. The 'Available Until' column for both rows is highlighted in yellow.

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for All Orders	Completed	All Orders	Screen Layout (Excel)	7/9/2020 11:23:44 AM	7/9/2020 11:23:50 AM	7/16/2020	Total Records: 464	Delete
This week's purchase orders	Completed	All Orders	Screen Layout (Excel)	7/9/2020 10:07:00 AM	7/9/2020 10:07:07 AM	7/16/2020	Total Records: 439	Delete

Appendix A: Search Tips

Quick search provides a faster way to perform some searches. The different options to refine your search are outlined below:

- Combine searches: Use "OR" between each search. For example, 12389 OR 83827
- Search for an exact match: Put a phrase inside quotes. For example, "Fisher Scientific"
- Exclude words from a search: Put a - in front of a word to exclude it. For example, John -Johnson
- Search for wildcards: Put an * in your word as a placeholder. For example, 123*98
- Search for place holder: Put one or more ? as a placeholder. For example, 1234??6

Note that searchable content is comprised of fields from the order types included. For example, requisitions will have different searchable fields/content than purchase orders.