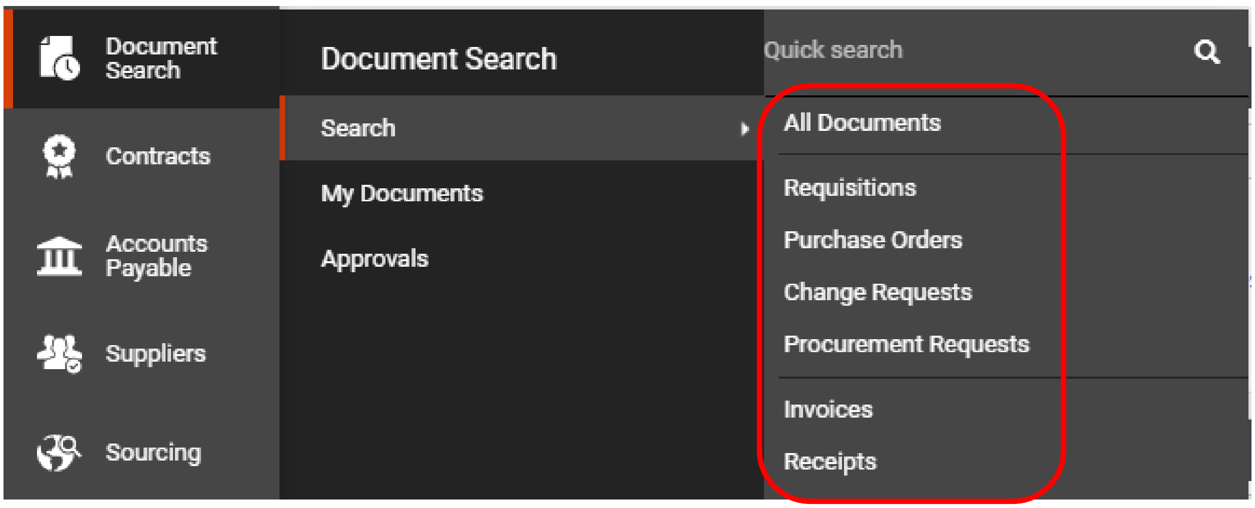
Document Search Queries

Document Visibility

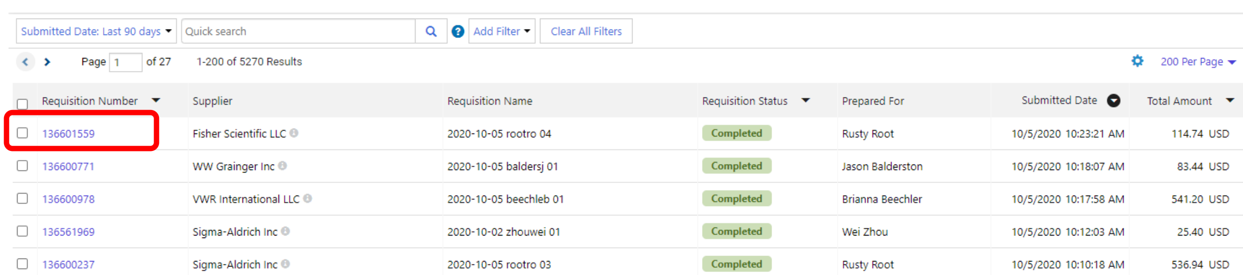
Document Search allows you to view documents within BennyBuy based on your role. Shoppers have access to view any documents they participated in as the Shopper. Requestors, Approvers, and Invoice Entry staff have the ability to view all documents within the system.

Search Documents

1. From the BennyBuy home page, click **Document Search,** go to **Search,** and then select the type of document you would like to search on.



2. Depending on your access and the type of document selected, search results will appear. To view a specific document, click on the document number.

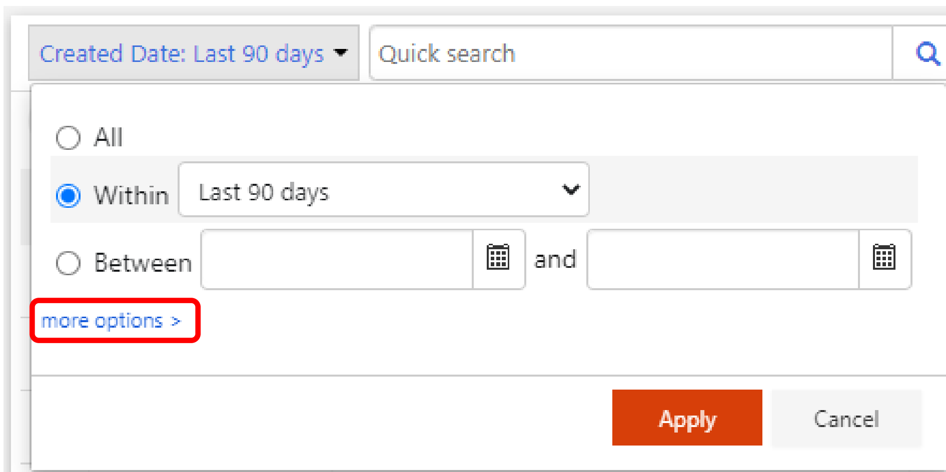


Document Search Queries

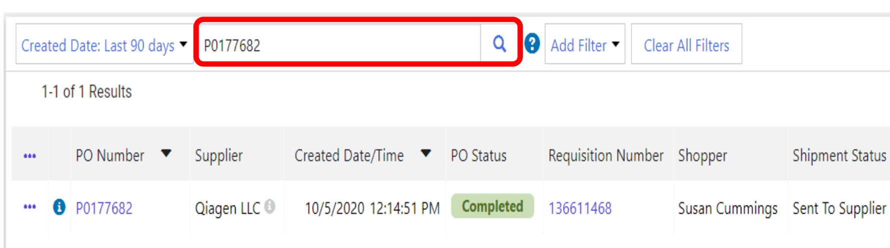
Refining Search Results

1. To refine your search results, use the menu along the top to filter based on your specific criteria.

- **Submitted/Created Date**: Allows you to filter based on a certain date or a date range. *Please note the system will default to Last 90 Days. To see additional date filters, select the More Options link.*



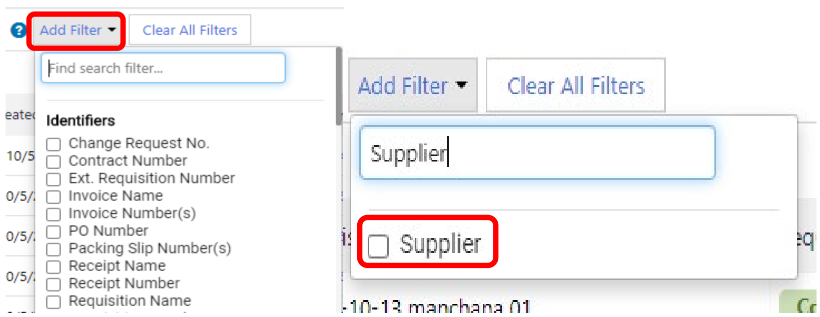
- **Quick Search**: The Quick Search menu allows you to do searches via a search bar. This search is most beneficial to look up specific document numbers. After entering your search criteria in the search bar, select the magnifying glass to execute the search.



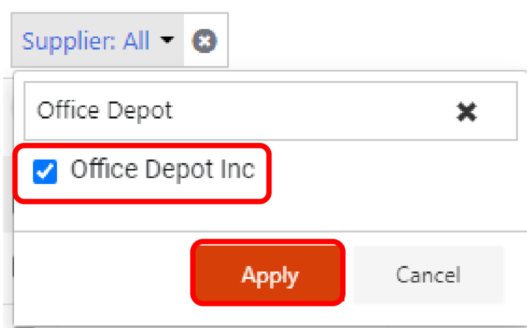
Document Search Queries

❖ **Add Filter:** The Add Filter box allows you to select specific filters to narrow down your search results. *Please note that multiple filters can be added to a document search, but they must be selected one at a time. See last page of tip sheet for a list of common filters.*

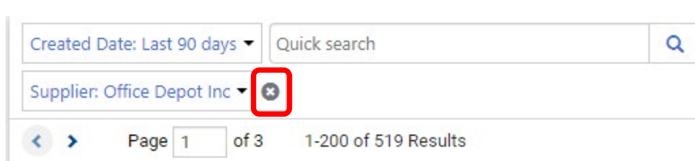
- ➢ Select the Add Filter box to see a list of available filters. You can use the search bar at the top to search for a specific filter or scroll through the list of available options. To select a filter, click the checkbox next to that filter.



- ➢ Once you have selected your filter and entered your search criteria, click the checkbox and then click Apply to execute the search. Repeat this process as needed to add multiple filters.



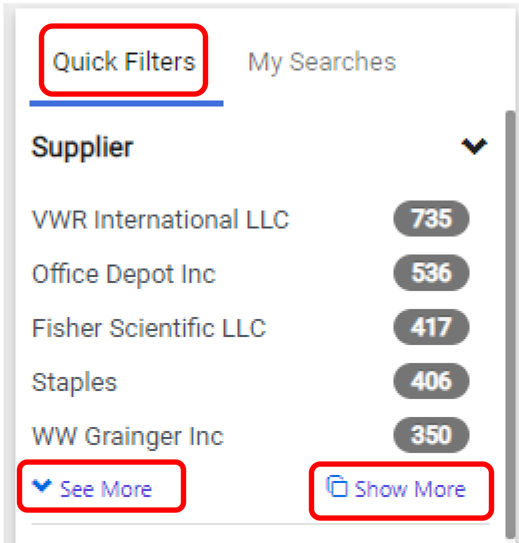
- ➢ To remove a filter, click the  icon next to that specific filter.



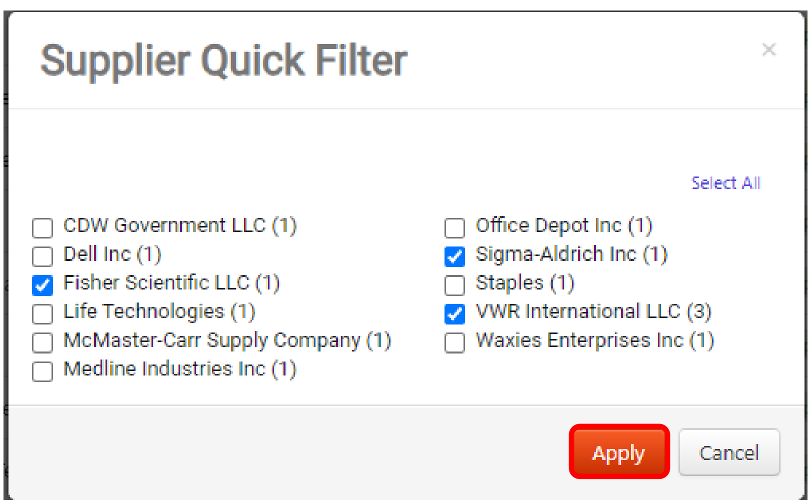
Oregon State University

Document Search Queries

2. Alternatively, you can use the Quick Filters menu along the left hand side to select certain filters. When you select a value, it will automatically apply that filter to your document search. Use the See More link to see additional options.



3. If you select Show More, a popup box will appear with all the available options for that specific filter. You can select multiple filters within this pop-up window. After your filters have been selected, click Apply.



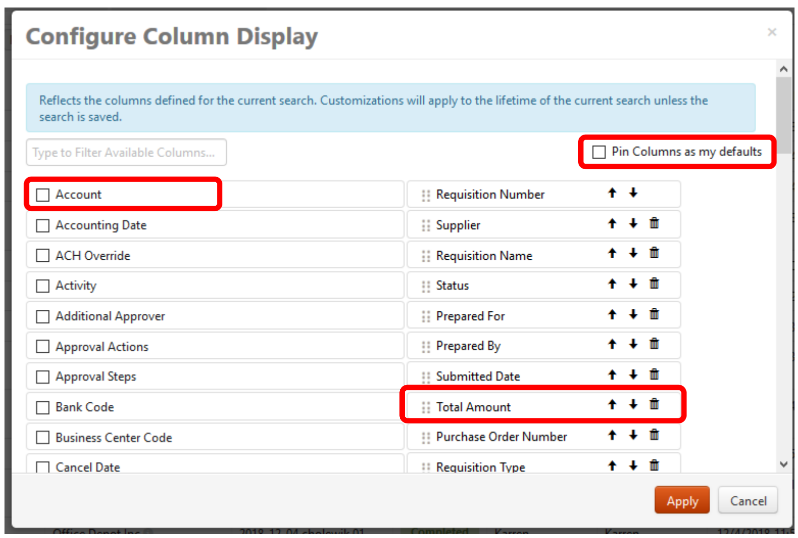
Document Search Queries

Customizing Search Results

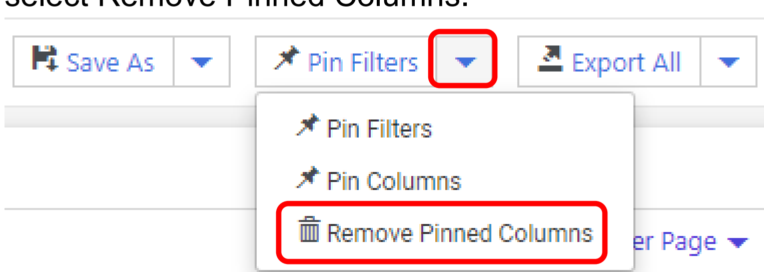
The Document Search page now allows you to customize the columns that display when executing a search.

- To configure the column display, select the gear icon near the top right of the document search. A popup box will appear. Use the checkboxes on the left hand side to add columns. Use the trash can symbol to remove columns you do not wish to see. Columns can be rearranged by dragging them up or down.

- Selecting the Pin Columns as my Defaults box will allow you to save these results so they appear every time you perform a document search.



- If you have pinned certain columns and would like to remove these, select the dropdown arrow next to the Pin Filters button and then select Remove Pinned Columns.

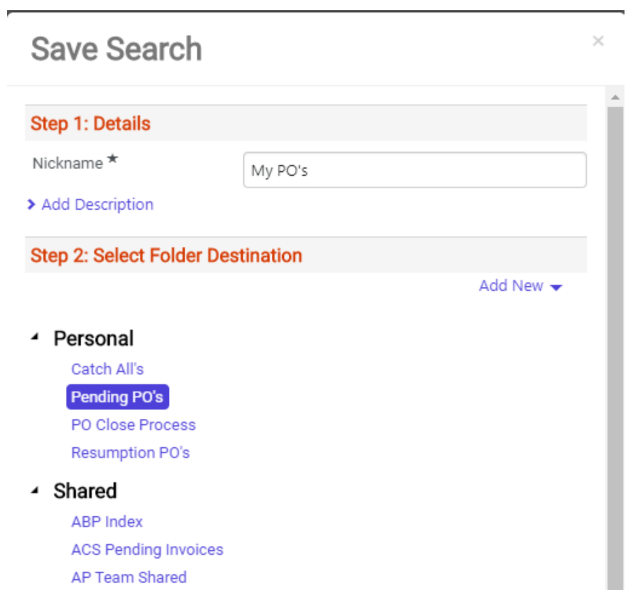


Document Search Queries

Saving Search Results

1. After executing a search, the results can be saved for future access or exported to an excel document for further analysis. To save a search, select the Save As button located near the top of the screen.

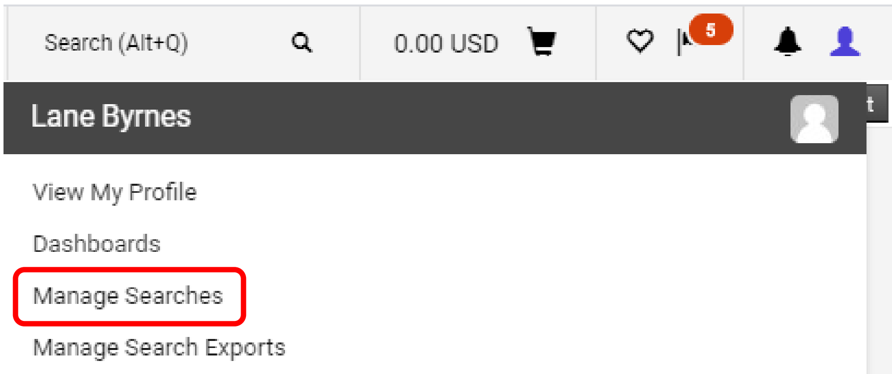
2. The **Save Search** box will appear. Enter a Nickname for the Saved Search and select a folder to save the search in. Once you have selected the folder, click Save at the bottom of the box to save the search.



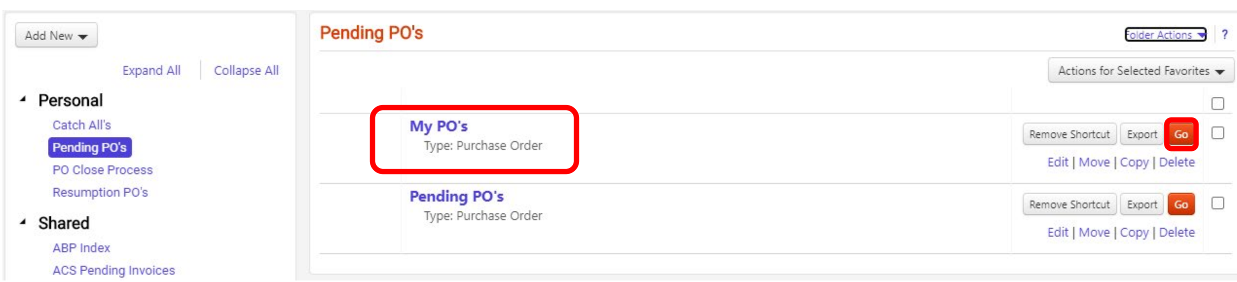
- ❖ If you do not have any folders setup, you will need to add one by clicking the Add New button and then selecting either Personal or Shared. Give the folder a Name and then select Save Changes. You can now save your document search within that folder.

Document Search Queries

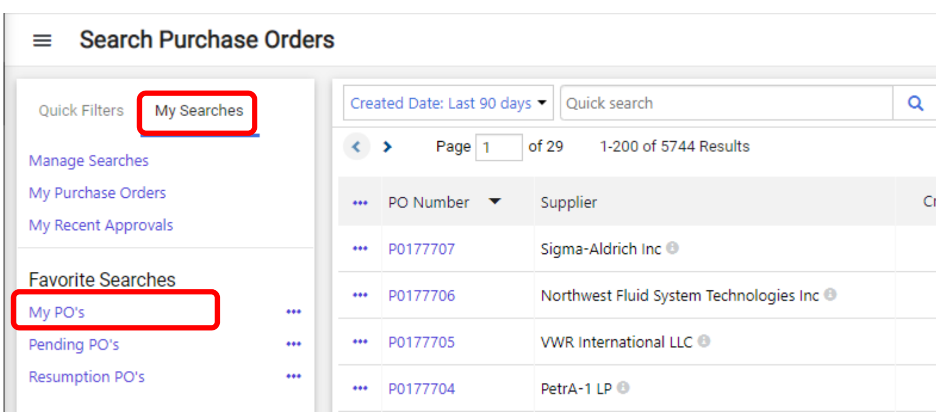
3. Once you have saved a search, you can now rerun that search as needed. To access your saved searches, select the in the upper right hand corner. From the dropdown menu, select Manage Searches.



4. This will take you to the Manage Searches page. On the left hand side, you will see a list of folders you have access to. Click on the folder that contains your search and then click on the search name or the Go button to execute your search.



5. Alternatively, if you are in the document search, you can view saved searches you have setup for that document type by selecting the My Searches tab in the upper left hand corner and then selecting the saved search.



Document Search Queries

List of Common Document Filters

Below is a list of common document filters. Please note that certain filters may/may not be available based on the document type selected (i.e. Requisition, PO, Invoice).

Supplier: Search documents for a specific supplier. Suppliers can be searched by name or ID number.

Total Amount: Search documents based on amount. Options include Equal To, Greater Than, Less Than, Is Between.

Participant: Search documents based on who participated in the document.

Shopper: Search documents based on who was the Shopper for an order or orders.

Requestor: Search documents based on who was the Requestor for an order or orders.

Product Description: Search documents based on the line item description.

Catalog Number: Search documents based on the catalog/part number.

Contract Number: Search documents associated with a contract.

Current Workflow Step: Search documents based on where they are at in the approval workflow (Budget Authority, Business Center, etc.)

Index: Search documents based on a certain index being charged. Filter options also include Starts With and Is Between.

Organization: Search documents based on a certain Org code being charged. Filter options also include Starts With and Is Between.

Account: Search documents based on a certain Account code being charged. Filter options also include Starts With and Is Between.

Activity: Search documents based on a certain Activity code being charged. Filter options also include Starts With and Is Between.

Fund: Search documents based on a certain Fund code being charged. Filter options also include Starts With and Is Between.

Pay Status: Specific to Invoices. Search documents based on their payment status (i.e. In Process, Paid, Payable, etc).

Invoice Type: Specific to invoices. Search documents based on their invoice type (i.e. PO/Non-PO Invoice, PO/Non-PO Credit Memo).