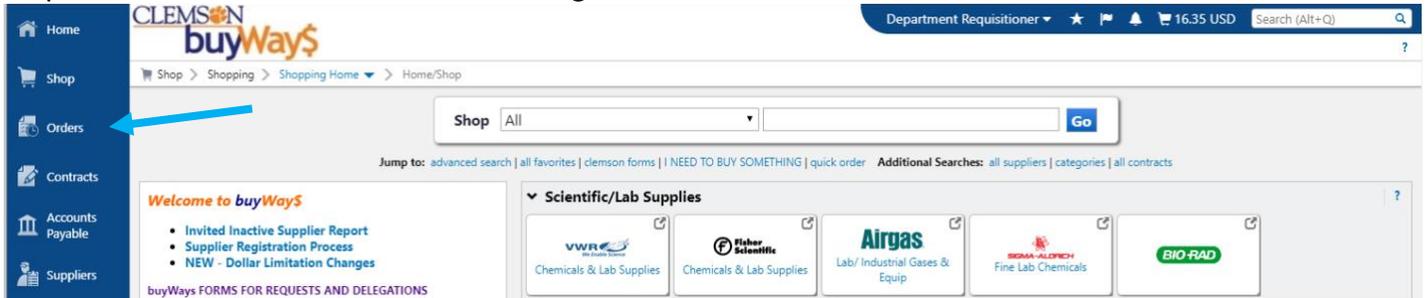


The new search interface allows end-users to customize filters and set defaults for future searches. This new search tool allows end-users to search for Requisitions, Purchase Orders, Change Requests, Procurement Requests, Invoices or Receipts. See page 3 below for searching Accounts Payable Requests including Direct Expenditures.

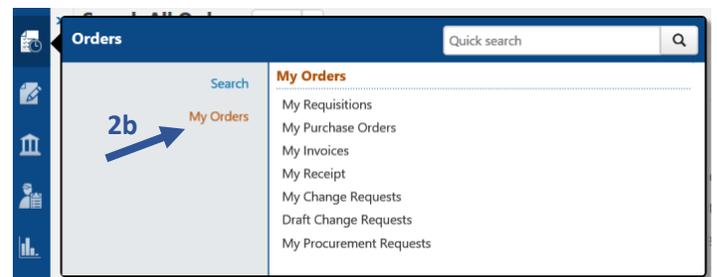
**Step 1. Click the Orders icon on the left navigation bar.**



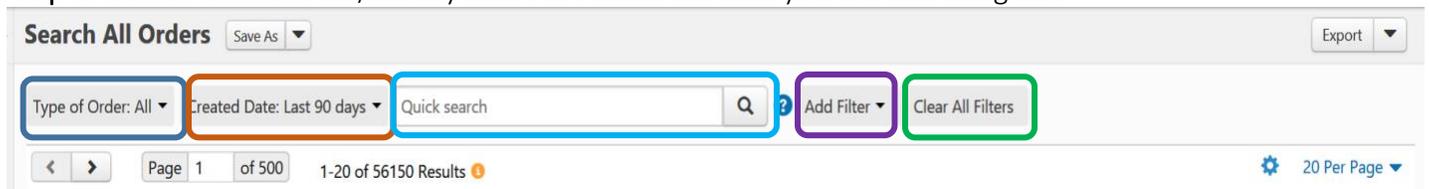
**Step 2. Search All Orders or My Orders**

**2a. All Orders:** To query all documents in buyWays including Requisitions, Purchase Orders, Change Requests, Procurement Requests, Invoices or Receipts. See page two for searching Accounts Payable Requests including Direct Expenditures.

**2b. My Orders:** For each document type where the user is the owner/creator.



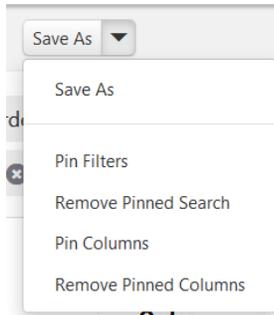
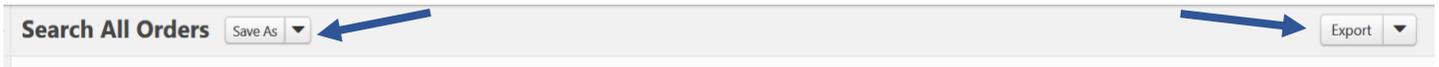
**Step 3. Search Criteria:** Add/modify filters to return the data you are searching for.



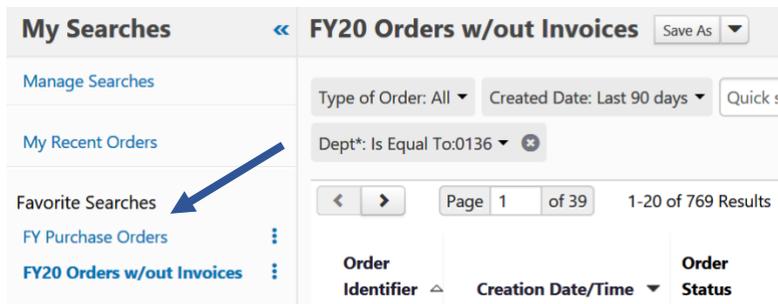
Type of Order (document)	Created Date	Quick Search	Add Filter	Clear All Filters
<ul style="list-style-type: none"> <li>Change Request</li> <li>Invoice</li> <li>Purchase Order</li> <li>Receipt</li> <li>Requisition</li> </ul>	Select desired date range to expand time frame, i.e. previous fiscal year, last 30 days, or between specified days. Default is 90 days.	Enter key word, invoice number, supplier name, etc. to find relative documents.	Select option to specify search criteria. Items marked with an asterisks (*) are chartfield values or other custom fields. For example, select Dept* when searching for documents charged to a specific department number.	Removes all custom filters.

**Filters:** Include all search options/criteria to add more specific criteria to help narrow or broaden the search results. A complete list of filters and definitions are available on the buyWays training page. Filters may vary depending on the type of order (document) you are searching for.

Step 4. Save Search, Pin Filters and Columns, Export.



- **Save As:** To save filtered searches for future use without having to recreate and add filters each time.
- **Pin Filters:** To set default filter settings for each time you return to the search.
- **Remove Pinned Filters:** To remove specified filters for search results.
- **Pin Columns:** To set column order as default for the search each time you return to the search.
- **Remove Pinned Columns:** To remove column order in the search results.
- **Export:** Export search results to Excel for data analysis



**NOTE:** Saved searches will be added as a shortcut under Favorite Searches on the left for more convenient searching.

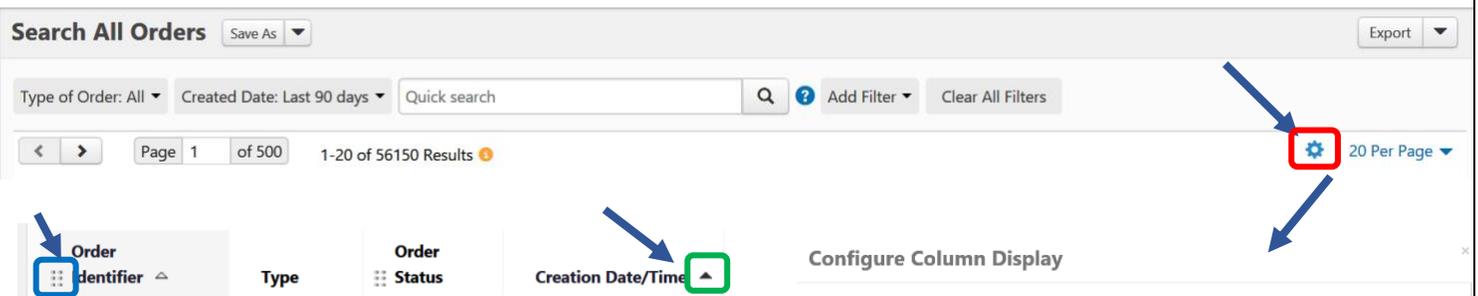
**To save a search:** Click Save As > Enter Nickname > Select desired folder > Save.

Searches that were created prior to this new functionality, can also be used and set as shortcuts.

**To create a short cut:** Click Manage Searches > Click the folder name containing your saved search > Click Add Shortcut button.

*Search Type determines placement of the shortcut, i.e., an invoice query will be displayed as a shortcut when you navigate to Orders > Search > Invoices*

Step 5. Additional Search Options: Customize defaults and arrange results.

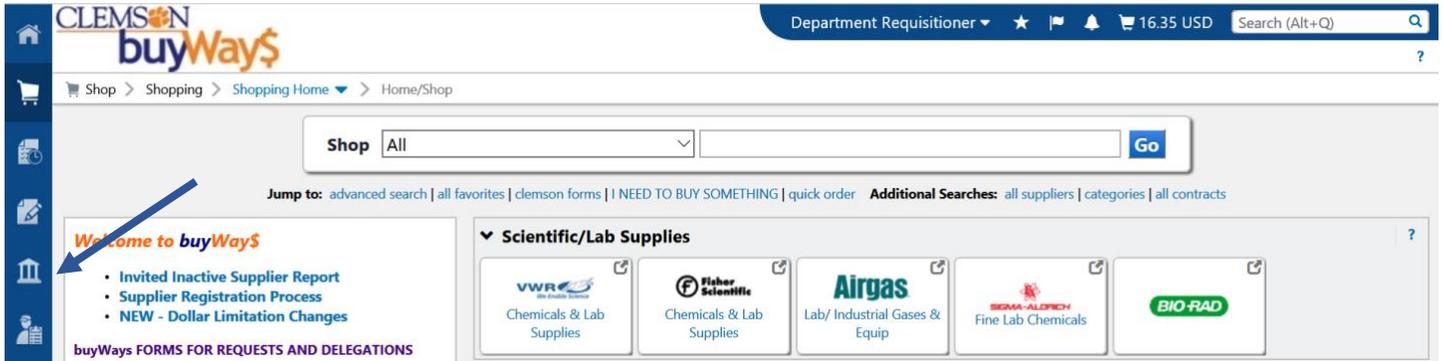


- **Column Order** - Arrange column display order by clicking on the drag and drop icon beside any column heading to move the column to the desired location.
- **Click ^** - Sort data in ascending or descending order as necessary to view results in the order you choose.
- **Gear** - Click the gear icon to select and order the columns for the search results.



**Search Accounts Payable Documents:** Search invoices and AP Requests (Direct Expenditures) to find all of your Accounts Payable documents.

**Step 1.** Click the Accounts Payable Icon on the left navigation bar.



**Step 2.** Search for Invoices or Search AP Requests.

**2a. Search Invoices:** To query all invoices in buyWays. (Invoice search can be completed in the order section above.)

**2b. Search AP Requests:** Includes Direct Expenditures, Enterprise Rental Car Payments and Non-Supplier Payment Requests.



**Step 3.** Add/Modify filters to return the data you are searching for.



**Created Date**

Select desired date range to expand time frame, i.e. previous fiscal year, last 30 days, or between specified days. *Default is 90 days.*

**Quick Search**

Enter key word, invoice number, supplier name, etc. to find relative documents.

**Add Filter**

Select option to specify search criteria. Items marked with an asterisk (\*) are chartfield values or other custom fields. For example, select Dept\* to find documents charged to a specific department number.

**Clear All Filters**

Removes all custom filters.

**Save As**

Save filtered searches for future use without recreating the search each time. Pin Filters and Pin Columns by clicking the down arrow, as described on pages above.

All other options for searches are available as defined above including saving searches, pinning filters, moving columns, exporting, etc. For additional assistance, send an email to [cubuyWays@clemsun.edu](mailto:cubuyWays@clemsun.edu).

