Using Orders Search and Creating Reports

Retrieve Order details for Requisitions, Purchase Orders, and Invoices.

- **Default Filters** – All types of orders, including requisitions, purchase orders, and invoices, with a create date in the last 90 days.
- **Output Display** – These vary based upon which search you are conducting and assigned iBuy roles, but examples are Order Identifier, Order Status, Order Owners, Creation Date/Time, Completed Date, Supplier, and Total Amount.
- **My Orders** – Lists your Requisitions, Purchase Orders, and Invoices.

Search Orders and Create Report:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Search**.
3.	Click **All Orders** or narrow your search by clicking: **Requisitions**, **Purchase Orders**, or **Invoices**. **NOTE:** By default, your search results will include orders with a create date in the last 90 days.
4.	Once you have your search results narrowed down, click **Export All** or click the arrow next to **Export All** for more options.
5.	Enter a unique report name in **Title**. **NOTE:** By default, **Type** will be Screen Layout and **Format** will be Excel. **Full Export** will provide more information.
6.	Click **Submit**. **NOTE:** A popup box will display with a link to **Manage Search Exports**. You can retrieve the export output from there or by selecting the arrow next to **Export All** and then selecting **Manage Search Exports**.

Use Filters in a Search:

Step	Task
1.	Perform a search as described above.
2.	Click **Add Filter**.
3.	Select the appropriate check box by a filter and then specify any required details of that filter.
4.	Click **Apply**. **NOTE:** You may use as many filters as you need to refine your search results.

Filter Examples (filters vary depending on the role you have in iBuy):

Requisition Filters:
- Chart
- Approved By Department
- Current Workflow Requisition Status
- Form Type
- Prepared By
- Prepared For
- Product Flags
- Status Flags
- Supplier

Purchase Order Filters:
Same as Requisition filters or
- AP Status
- Invoice Status
- Matching Status
- Status Flags
- Receipt Status
- Supplier Status

Invoice Filters:
Same as Requisition filters or
- Invoiced By
- Invoice Owner
- Invoice Source
- Invoice Type
- Matching Status
- Pay Status
- Current Workflow Status

Configure the Column Display of Search Results:

Step	Task
1.	Perform a search as described above and select any filters as described above.
2.	Click on the cog icon on the top right to open **Configure Column Display**.
3.	Select the appropriate check box next to any new filters you want to include in the column display of your search results.
4.	Use the arrows to update the order of the column display.
5.	Select the check box to pin the column display if needed.
6.	Click **Apply**.

Save a Search:

Step	Task
1.	Perform a search as described above.
2.	Click **Save As**.
3.	Enter a unique name in **Nickname** (required).
4.	Enter a description in **Add Description** (optional).
5.	Select an existing destination folder you want to save in **OR** Create a new folder to save in by clicking **Add New**. **NOTE:** The saved search will show up under **My Searches** > **Favorite Searches** within the search type. For example, if you save a search of requisitions, then the saved search will be found under **Orders** > **Search** > **Requisitions** > **My Searches** > **Favorite Searches** going forward.
6.	Click **Save**.

Find and Run a Saved Search:

Step	Task
1.	Click **Orders** on the task bar.
2.	Click **Search**.
3.	Click on the appropriate search type: **All Orders**, **Requisitions**, **Purchase Orders**, or **Invoices**.
4.	Click on **My Searches**.
5.	Click on the name of the saved search you want.

Automate a Saved Search:

Step	Task
1.	Perform a search as described above and save it.
2.	Click **Orders** on the task bar.
3.	Click **Search**.
4.	Click on the appropriate search type: **All Orders**, **Requisitions**, **Purchase Orders**, or **Invoices**.
5.	Select the arrow next to **Export All**.
6.	Select **Manage Scheduled Exports**. **NOTE:** Any existing scheduled exports will display under the **Export Schedules** tab.
7.	To create a new automated task, click **Create Schedule for…**
8.	Click on the appropriate search type: **All Orders**, **Invoice**, **Purchase Order**, or **Requisition**.
9.	Select the appropriate saved search under **Search to Export** (required).
10.	Select the export type (in many cases you will want **Full Export**) under **Type** (required).
11.	Enter the date you want the scheduled run to start under **Starts On** (required).
12.	Select the frequency of the scheduled run under **Frequency** (required).
13.	Select the day(s) and/or week of the month under **Occurs Every** (required for weekly and monthly frequency).
14.	Select the day(s) under **On The** (required for monthly frequency).
15.	Select the date you want the scheduled run to end under **Export Until** (required).
16.	Click **Save**. **NOTE:** The scheduled task will now be saved. You can edit, delete, or disable the task at any time.