# Searching Requisitions & PO Documents

## Understanding Document Visibility

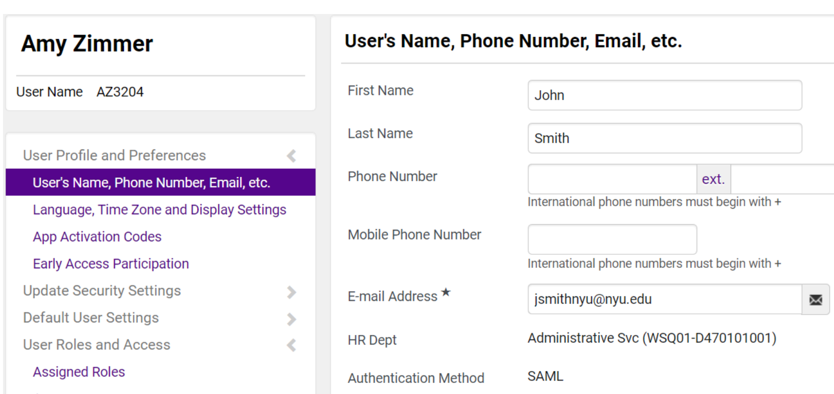
**Document Visibility** allows you to view documents based on a combination of your iBuy NYU role, your assigned HR Department on your user profile, and the department access you have been granted.

### User Role Visibility Settings

- **Shoppers** have access to view any carts or requisitioning they participated in (e.g. assigned a draft shopping cart).
- **Requestors** and **Approvers** have the ability to view orders they submitted or approved, as well as orders within their HR department and the Department access granted.
- Administrative roles including **Fiscal Officers** and **Central Administrative Units** have elevated document access to accommodate the needs of their business function.

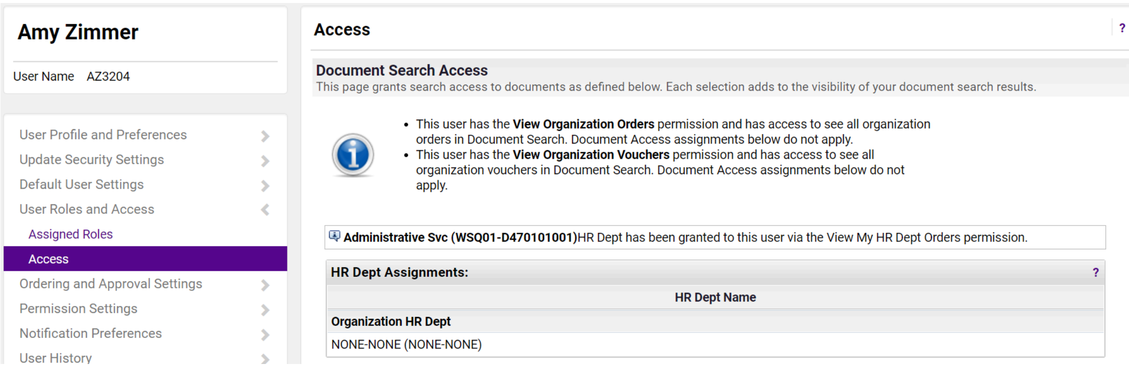
### HR Department

When documents are submitted in iBuy, they are tagged with the HR Department of the user who initiated the request. The HR Department assignment on your user profile will grant you document visibility based on the role access described above.



## Access

The Department Access page on the user profile will grant a user access to additional HR Departments that they require visibility into. If you have responsibilities for multiple departments, it is best practice to ensure your profile has all of the correct HR Departments listed to ensure you can see the appropriate documents. Use the Service Link Form to request department access.




# Searching for iBuy Documents and Records

There are two main navigation menus within iBuy through the left-side menu and the top navigation menu.

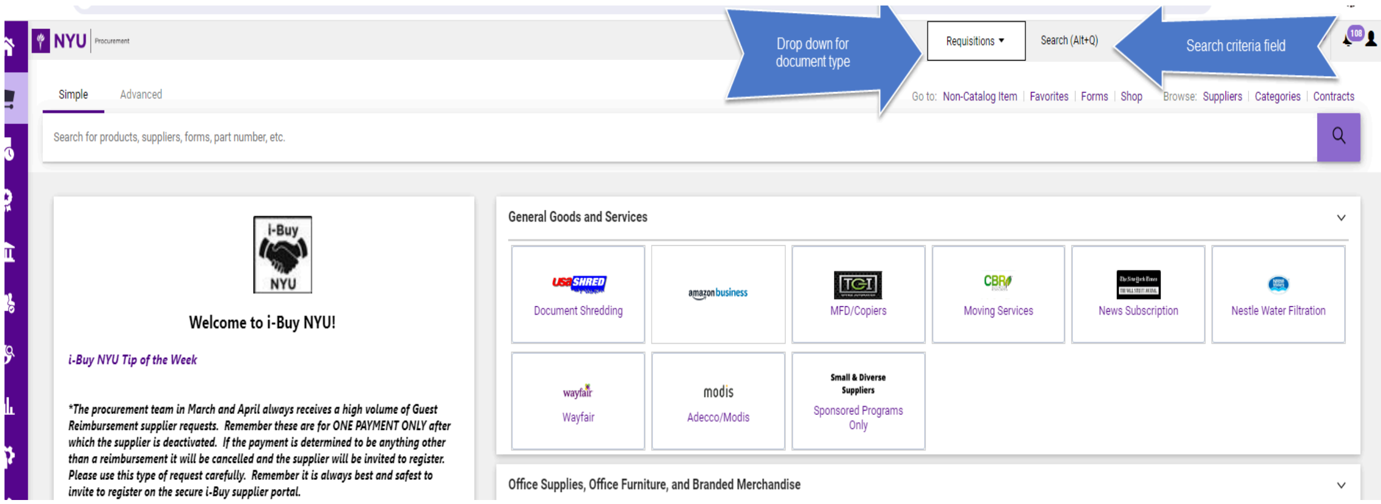
### Top Right Navigation Menu

The top navigation menu is located on the top, right side of the page and provides a quick search feature to locate documents.

| Icon | Name | Description |
|---|---|---|
|  | **Quick Search** | Quick Search allows a user to search for a PO #, Requisition #, Invoice #, etc. |
| N/A | **Search Dropdown** | The Dropdown to the left of the quick search bar allows a user to filter the transaction type they are searching for. You are not required to change this when you are searching for a document and 'All' will provide you a better opportunity to locate your document. |

## Quick Search Functionality

The quick search allows iBuy NYU users the capability to do a quick simple unfiltered search based on criteria such as a supplier name or document number (PO, Voucher, Requisition, Receipt, etc...). The Function is located on the top of the iBuy NYU application.




The function is very useful to quickly pull up specific documents in iBuy and view them accordingly. The dropdown on the left side of this function can be used to select the specific document type or a user can search on ALL. When ALL is used many different documents will be displayed.

## Left-Side Navigation Menu

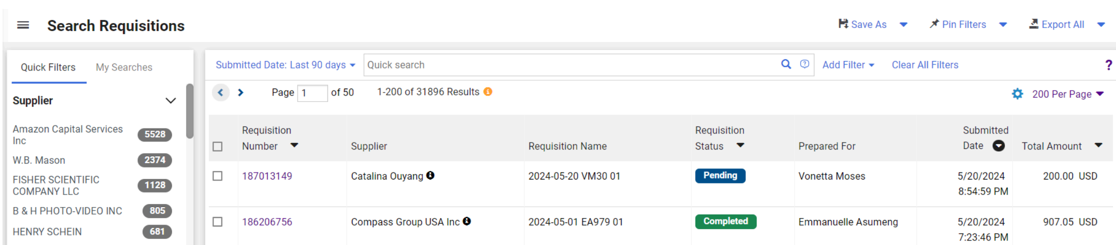
The side navigation menu is located on the left-hand side of the browser and allows you access to basic and advanced search features for documents within their designated module. This job aide will provide you with information on searching requisitions and purchase orders.

| Icon | Name | Description |
|---|---|---|
| | **Orders** | The Orders area will allow you to search for requisitions, purchase orders, and vouchers which you have been granted visibility based on the settings outlined above. |

# Basic Document Search Features

1. Login to iBuy NYU via the Work tab of NYUHome using your Net ID and Password.

2. From the iBuy NYU left side navigation menu, select the Orders module icon, then search for the document type you're interested in (ex: **Search > Requisitions)**
3. The search results will return the documents wich you have been granted access to as described above. The search features all a user to Filter search results.
    - The Quick filters on the left hand side of teh screen will provide commonly used filters to narrow your search.
    - The 'Add Filter' dropdown menu will provide a more detailed list of attributes to filter your search.
    - The default setting is to pull the last 90 days of transactions. You may adjust this to fit your needs by updated the 'Submitted Date' parameters drop down.



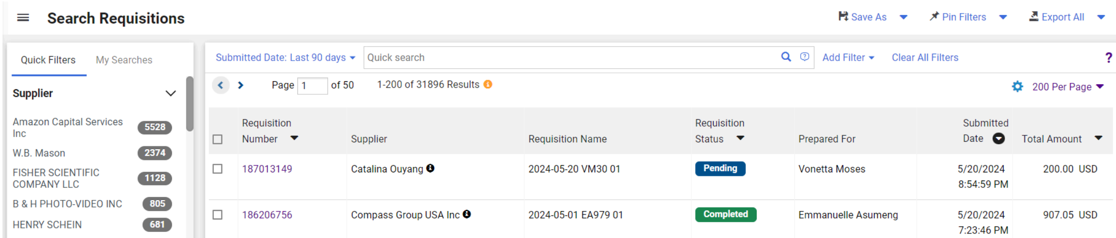

4. Select the document number to view the full document record.

- Reminder: Users can navigate to the related documents by clicking the document number under the Summary area in the associated document section.

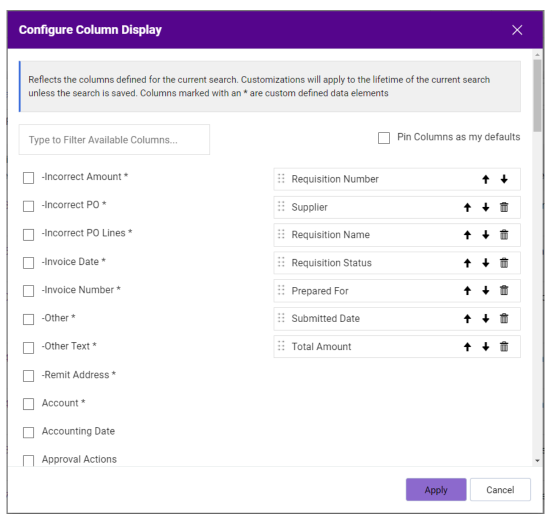
## Customize Your Search

1. Login to iBuy NYU via the Work tab of NYUHome using your Net ID and Password.
2. From the iBuy NYU left side navigation menu, select the Orders module icon, then search for the document type you're interested in (ex: **Search > Requisitions)**
3. The search results will return the documents which you have been granted access to as described above. The search features all a user to Filter search results.
    - The Quick filters on the left hand side of the screen will provide commonly used filters to narrow your search.

- The ‘Add Filter’ dropdown menu will provide a more detailed list of attributes to filter your search.



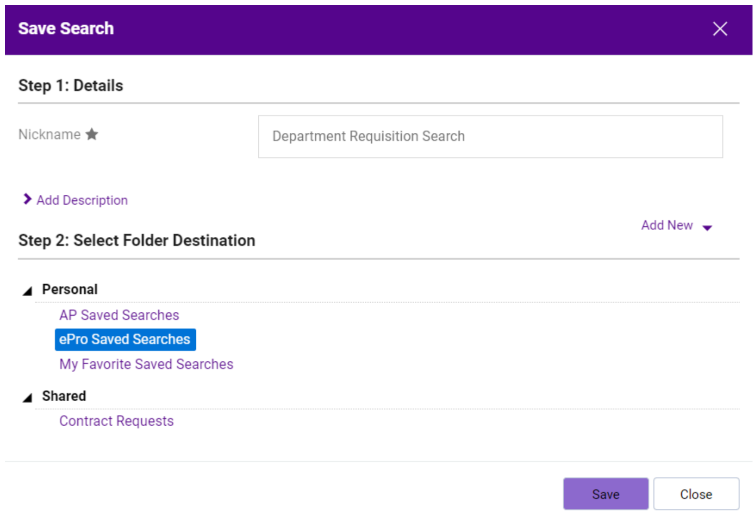

4. A user can **customize their view** to include additional attributes and/or reposition the column display by selecting the gear icon near the upper right hand side of the search results.
   - Select the attributes you wish to add or remove from the column display and use the arrows or drag the fields on the right side of the screen to your preferred order of displayed information.
   - Select ‘Pin Columns as my defaults’ to save these settings. Selecting this will return your search results in this format moving forward.



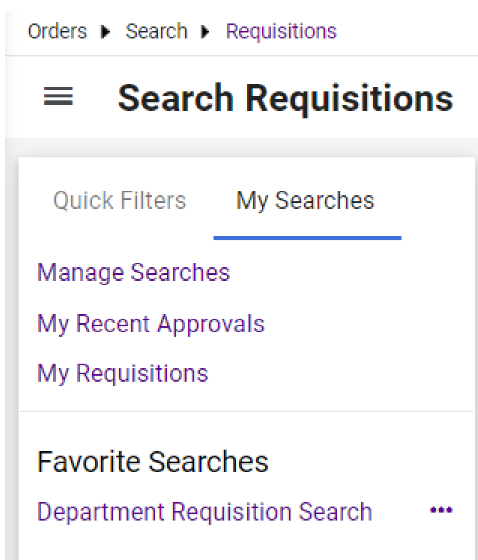

## Saving Search Results

1. Search results can be saved for future access or exported for further analysis or sharing. Select the ‘Save As’ dropdown near the top right hand corner of the search results. **Click Save As.**
2. A pop up will display and you will be prompted to name the search, and create a destination folder to store your saved search for future use.
   - **Enter a Nickname** for this personal search.

- Select the Personal Folder Destination to save your search.
  - If you do not have a personal folder setup. Navigate to Add New > Top Level Personal Folder > Enter a Relevant Folder Name > Click Save Changes.




3. You will now be able to view this saved search when you navigate back to the search results and select the 'My Searches' tab on the left hand side of the page.




## Exporting Search Results

1. To export search results, navigate to the Export All dropdown in the top right hand corner of the screen. Click **Export All**.

2. You will be prompted with a **Document Search Export** dialogue box. Enter a **Title (required) or brief description.**
3. Select an option from the Type field which includes the following:
    - Screen Layout: Will export only the data shown on the screen.
    - Full Export: Will export all of transactions in your search results and the columns displayed on the screen.
    - Transaction Export: Includes transaction data for your search results (Transaction Date, Chartfield Information, approva dates, product descriptions, etc.)
4. Click **Next**. Depending on the transaction type (eg. Requisitions, Purchase Orders, or Vouchers) you may be prompted with additional questions on the export details.
5. Once all information is provided, click Submit. You will be prompted with a confirmation message and an option to navigate to the Manage Search Export Page where you can download your results.  Clicking the link will take you to the download queue. **Refresh your screen** until the File Name becomes a downloadable .zip file. The file can be exported in csv format and saved as an Excel file for maximum useability.  Your export is complete!

    ***Please note:*** Your request may take several minutes to execute depending on the size and workload of the system.