

New BearBuy Elastic Search

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Accessing Training Video

- Log into BB
- On the left navigation panel click on the paper box > Search > Search Documents
- (Orders > Search > All Orders)
- A pop up window will appear that will display the following:
- Click the show me button for tutorial
- Follow Prompted Steps
- This Pop-Up window will continue to appear for the user until it is disabled. To disable this, select "No" on the "Show this again" option

Welcome! ×

It looks like you're new here. We'd like to give you a quick tour to introduce you to some of our new features, if you're interested.

Step-by-Step Tour

Walk through a tour highlighting important features Yes No

Show this again Yes No

Video

Heads up! This video will open in a pop-up window. If you use a pop-up blocker, please ensure it does not block this.

Watch a video explaining how to use this page Yes No

Show this again Yes No

Simple Search (Slide 1 of 3)

1. In this section users can narrow down transaction results by clicking on "Type of Order" (Invoice, Purchase order, Receipt, Requisition)

2. The date placeholder will default to "Last 90 days" regardless of transaction type
-Users can modify the date range as required

3. Quick search allows the following:

a. Combine Search: Allows users to combine criteria in search. Example: "BB12345678" or "BB24681012" or any combination of POs, vouchers, receipts, invoices etc

b. Search for a Phrase Match: Search a keyword that could be related to an order type and it will pull up any results related to that keyword. Using the keyword "Office Depot" will pull up all transactions that have the keyword "Office Depot"

c. Exclude Words from a search: By placing a dash in front of a word it will exclude anything related to that keyword in a search result. Example: if in your search result you did not want to include "Fisher Scientific" simply place a "-" in front of the name: "-Fisher Scientific"

d. Search for Wildcards: This means that if the user places a "*" in front of any keyword or number it will pull up anything that contains it. Example: if "*1234" is used then it will pull up all transactions that include "1234"

e. Search for placeholder: This allows the user to insert a placeholder in a sequence by placing a "?". An example of this would be: "1234??6" this means that it will pull all results that starts with "1234" and ends with "6"

-It is important to note that users cannot search multiple transactions in the Simple Search box. One of the functions above will allow the user to search multiple transactions. If the user tries to do a mass search it will return no results

Order Identifier	Type	Order Status	Order Owners	Created Date/Time
<input type="checkbox"/> S0808816	Invoice	Pending	Gilbert ESCOBAR Stephanie Ruelas	9/24/2020 4:26:07 PM
<input type="checkbox"/> BB01403508	Purchase Order	Complete	Mufeng Wei	9/24/2020 4:25:42 PM
<input type="checkbox"/> BB01403507	Purchase Order	Complete	PHIL KANG	9/24/2020 4:25:31 PM
<input type="checkbox"/> BB01403506	Purchase Order	Complete	Juan Hurtado	9/24/2020 4:25:13 PM

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

- Combine Searches** a
- Use "OR" between each search. For example, 12389 OR 83827
- Search for a Phrase Match** b
- Put a phrase inside quotes. For example, "Fisher Scientific"
- Exclude Words from a search** c
- Put a - in front of a word to exclude it. For example, John -Johnson
- Search for wildcards** d
- Put an * in your word as a placeholder. For example, 123*98
- Search for place holder** e

Simple Search (Slide 2 of 3)

4. Quick Search filters to the right are filters that users can select to narrow down their search

a. By clicking on one of the boxes it will place the new filter to the top of the search and add a dropdown to narrow down the search further. In the case below "Supplier" was selected

b. In the example to the right, the user has the ability to type in the supplier's name and can select multiple suppliers at a time

c. Additionally, if the user has a list of transactions that they want to search, they can click on the "Order ID" and paste all the results in the search box and click "Apply". The search is intuitive enough to place commas between each PO.

5. By Clicking on the "Clear All Filters" button it will return the search results to the default

The screenshot displays a search interface for orders. At the top, there are filters for 'Type of Order: All', 'Created Date: Last 90 days', and a 'Quick search' box. To the right are buttons for 'Add Filter' and 'Clear All Filters'. Below the filters is a table of search results with columns for 'Order Identifier', 'Type', 'Order Status', 'Order Owners', and 'Created Date/Time'. The table lists several orders, including invoices and purchase orders from various suppliers.

Annotations 1-5 highlight key UI elements: 1. Filter dropdowns, 2. Page and result counts, 3. Quick search box, 4. Add Filter button, 5. Clear All Filters button.

Annotations a-c show a detailed view of the search process: a. A dropdown menu for 'Identifiers' with 'Order Id' selected. b. A search box for 'Supplier: All' with a list of suppliers including 'BLAISDELL'S BUSINESS PRODUCTS' and 'Office Depot Inc'. c. A search box containing multiple order IDs separated by commas, with an 'Apply' button.

Simple Search (Slide 3 of 3)

6. Allows users to filter out results by corresponding categories such as Supplier, Order Owners, Product Flags, etc.

7. My Searches allows users to view any searches that have been saved by the user

The image displays two screenshots of the BearBUY UC Berkeley search interface. The left screenshot shows the 'Search All Orders' page with the 'Quick Filters' tab selected, indicated by a red box labeled '6'. The right screenshot shows the 'Search All Orders' page with the 'My Searches' tab selected, indicated by a red box labeled '7'.

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Orders ▶ Search ▶ All Orders

Search All Orders

6

Quick Filters My Searches

Supplier ▼

FISHER SCIENTIFIC	15938
Amazon Business	5717
VWR INTERNATIONAL LLC	5225
SIGMA-ALDRICH	4839
GRAINGER INC	3470

▼ See More Show More

Order Owners ▼

TJANDRA, YENNY	7445
LAMEY, Carl	2895
DUNN, Erecka Q.	2299
MUNOZ, Carlos Edward	2020
Bentley, Mike	1742

▼ See More Show More

Search All Orders

7

Quick Filters My Searches

Manage Searches

My Recent Approvals

My Recent Orders

Favorite Searches

Test ...

Test Shared ...

Advanced Search (Slide 1 of 5)

1. Save As: Any search that users have created has the ability to save the custom search.

a. Click on the “Save As” link, name the search, and choose the appropriate folder to save the search to. The user has the ability to save it to their Personal Folder or a shared folder. (A shared folder may be given access by any other user of that folder)

b. To access favorite saved searches navigate back to the “My Searches” and click on the link/links under the “Favorite Searches”

c. To access a shared search navigate to “My Searches” > “Manage Searches” and click on the shared search

The screenshot shows the Advanced Search interface with several callouts:

- 1**: Points to the "Save As" button in the top toolbar.
- 2**: Points to the "Pin Filters" button in the top toolbar.
- 3**: Points to the "Export All" button in the top toolbar.
- 4**: Points to the gear icon in the "Save Search" dialog box.
- a**: Points to the "Save Search" dialog box.
- b**: Points to the "My Searches" button in the "Quick Filters" section.
- c**: Points to the "Personal" folder in the "Manage Searches" section.

The "Save Search" dialog box shows the following steps:

- Step 1: Details**: Includes a "Nickname" field with a placeholder "Type in name" and an "Add Description" link.
- Step 2: Select Folder Destination**: Includes an "Add New" link.

The "Manage Searches" section shows a list of searches under the "Personal" folder, including "test 1".

Advanced Search (Slide 2 of 5)

2. On the top-right hand corner users can save filters by Pinning them

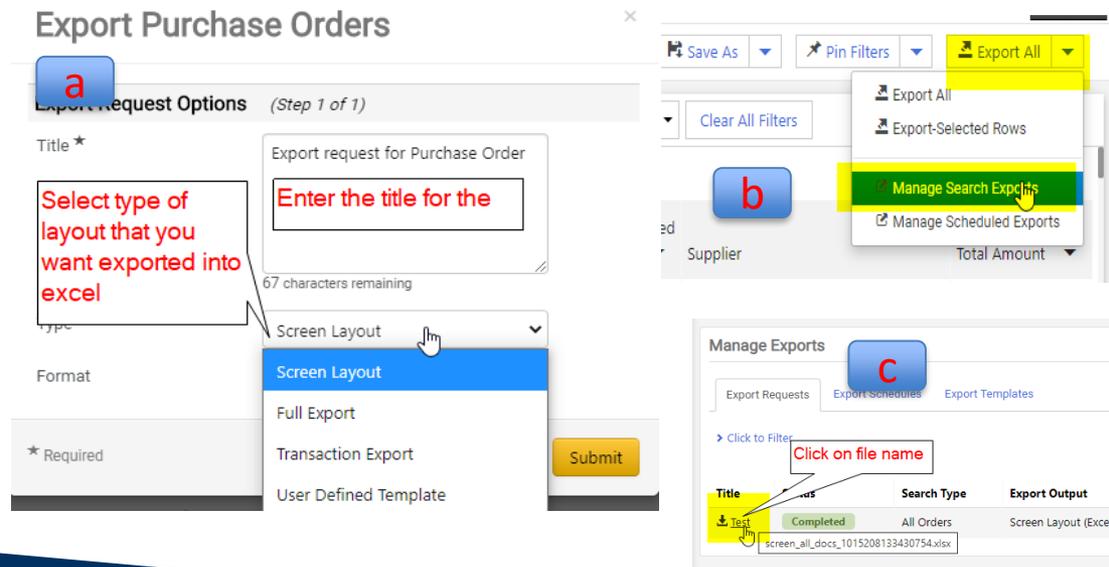
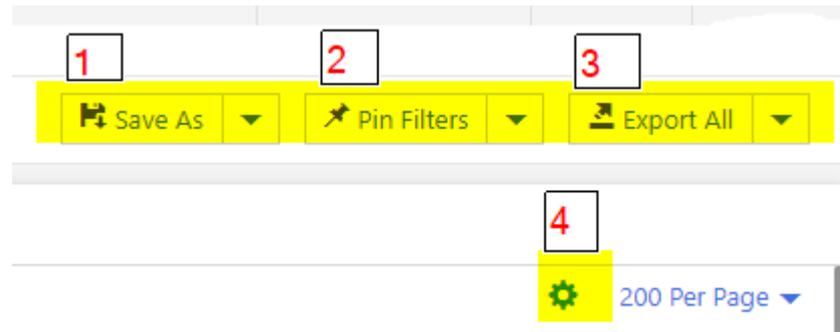
- By clicking on the "Pin Filters" button will be the default search setting every time the user logs in

3. When Export All is clicked the next page will request a Title and other options for the file

a. Enter the Title and select format

b. To retrieve the file navigate to the "Export All" Button and click on the down arrow which will then display "Manage Search Exports"

c. Once the link is clicked, another page will appear where users can download the file



Advanced Search (Slide 3 of 5)

4. Configure Columns allows the user to choose the criteria that they want displayed in the search results. Click on the gear icon (top right corner) and select the desired filters.

a. Click apply once desired columns are selected and it will display in the search

- Additionally, users have the ability to drag columns to the left and right of one-another in the search
- Columns notated with an asterisk have the ability to sort.

b. Selected columns will appear in the new search

Configure Column Display

Type in a column to add into your search filter or scroll to choose

This will save your column configuration as your default

Click on boxes next to the description to include that column

Asterisk indicates that sort function is available

Delete a column

Bump the priority of the column. The columns will display in the order from top to bottom

Apply Cancel

Total Amount	Account	Department
374.78 USD	55030	12300
59.98 USD	55030	12248
388.75 USD	55030	12100
101.04 USD	55040	21724
182.20 USD	55016	23800
52.00 USD	55030	15900
68.03 USD	55030	15900
19.75 USD	55030	23507
449.00 USD	57003	10836
40.92 USD	55030	15765

Advanced Search (Slide 4 of 5)

5. Manage Scheduled Exports will create scheduled exports to any document types as long as a saved search for that document type exists
- To create schedule exports click on the down arrow next to the "Export All" > Manage Scheduled Exports > "Create Schedule for document type"
 - Click on "Create Schedule For" > click on the "transaction type"
 - To find your exported files click on the Export Requests tab

The screenshot shows the 'Manage Scheduled Exports' interface. At the top, there are 'Filters' and 'Export All' buttons. A dropdown menu is open, showing options: 'Export All', 'Export-Selected Rows', '5 Manage Search Exports', 'Manage Scheduled Exports' (highlighted in green), and 'Manage Export Templates'. A hand cursor is pointing at 'Manage Scheduled Exports'. To the right, a 'Create Schedule for...' dropdown is open, showing a list of document types: 'All Orders', 'Requests', 'Invoice', 'Procurement Requests', 'Purchase Order', 'Receipt', and 'Requisition'. A hand cursor is pointing at 'Requests', and a blue box with the letter 'a' is next to it. Below this, the 'Schedule Export' form is visible. It has a 'Personal' dropdown with 'Test' selected. A blue box with the letter 'b' is next to the 'Personal' dropdown. A callout box points to the 'Test' option with the text 'Choose your saved search'. The form includes fields for 'Search Type', 'Search To Export *', 'Type *', 'Format', 'Screen Layout', 'Excel', 'Frequency *', 'Occurs Every *', 'On The *', 'Export Until *', and 'Starts On *'. A callout box points to the 'Excel' format field with the text 'If option is available choose the format of your exported excel file'. Another callout box points to the 'Type' field with the text 'If option is available, choose the file type'. The 'Starts On' field is set to '09/19/2020' with a calendar icon. A callout box points to the date field with the text 'setup your schedule of when you would like to receive the file'. The 'Frequency' is set to 'Monthly' and 'Occurs Every' is set to '1 month(s)'. At the bottom, there is a 'Manage Exports' section with a dropdown set to 'All Orders' and a 'Save' button. A blue box with the letter 'c' is next to the 'Manage Exports' dropdown. Below this, there is a list of export requests: 'Export request for All Orders' and 'Test', both with download icons.

Advanced Search (Slide 5 of 5)

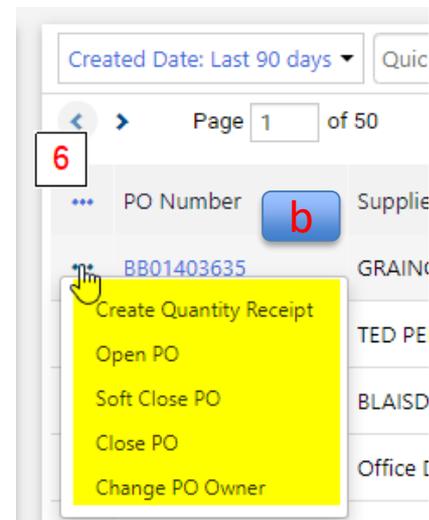
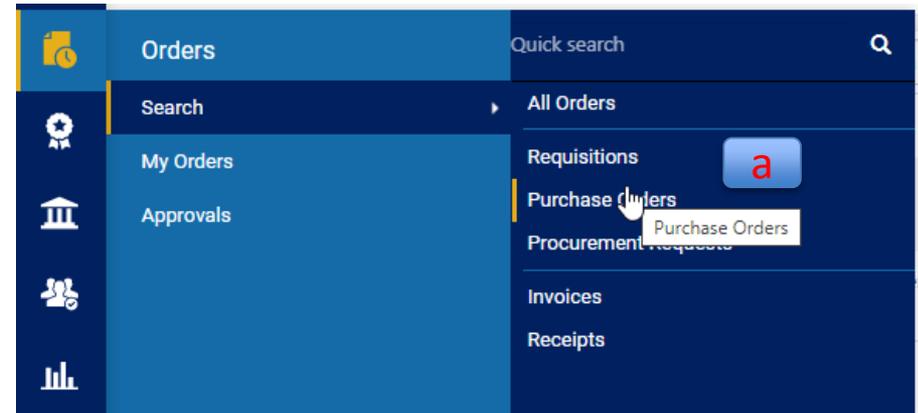
6. Taking action on a transaction from search

a. Navigate through the Orders left side bar and choose a transaction type

b. Once the results appear, there will be three dots next to each transaction number. Click on the three dots (see to the right)

- Once any of the options are clicked, users can complete that specific transaction

*Taking action only works if the user selects a specific transaction type. The three dots will not appear if "All Orders" is selected



Granting Access

- If anyone wants to turn this on before it becomes mandatory in November please send an email to bearbuyhelp@berkeley.edu