

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 place holder: 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 'Add Filter' and 'Clear All Filters' buttons. Below the filters is a table of 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 points to the filter dropdowns, 2 to the search box, 3 to the 'Add Filter' button, 4 to the 'Clear All Filters' button, and 5 to the 'Clear All Filters' button. A separate window shows a filter dropdown menu with categories like 'Identifiers', 'Dates', and 'Suppliers'. A callout 'a' points to the 'Supplier' option. Another callout 'b' points to a search box where a user can 'Type supplier's name'. A third callout 'c' points to a search box containing multiple order IDs separated by commas, with a note that 'Multiple values can be separated by a comma(,)'.

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
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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 interface. The left screenshot, labeled with a red box containing the number '6', shows the 'Search All Orders' page with the 'Quick Filters' tab selected. The right screenshot, labeled with a red box containing the number '7', shows the 'Search All Orders' page with the 'My Searches' tab selected.

BearBUY | UC Berkeley
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

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 illustrates the 'Save Search' workflow in a software interface. At the top, a toolbar contains three buttons: 'Save As' (1), 'Pin Filters' (2), and 'Export All' (3). Below this, a 'Save Search' dialog box is shown. It has a title bar with a close button (a) and a settings icon (4). The dialog is divided into two steps: 'Step 1: Details' and 'Step 2: Select Folder Destination'. In Step 1, there is a 'Nickname' field with a star icon and a text input field containing 'Type in name'. Below this is a link for 'Add Description'. Step 2 shows a tree view of folders under 'Personal' (with a sub-link 'Test Searches') and 'Shared'. A 'Quick Filters' section is visible, with 'My Searches' highlighted by a hand cursor (b). Below the filters are links for 'Manage Searches', 'My Purchase Orders' (with a button 'b'), and 'My Recent Approvals'. At the bottom, a 'Favorite Searches' section shows a search named 'test 1'. On the right side of the interface, there is a '200 Per Page' dropdown and a list of folders under 'Personal' and 'Shared', with a button 'C' next to the 'Personal' folder.

Advanced Search (Slide 2 of 5)

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

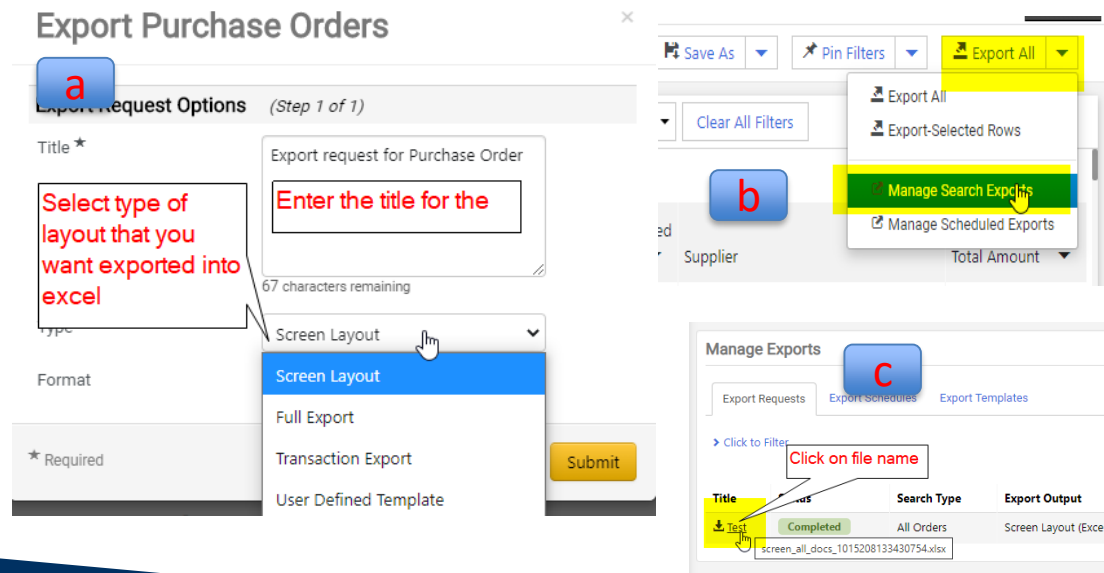
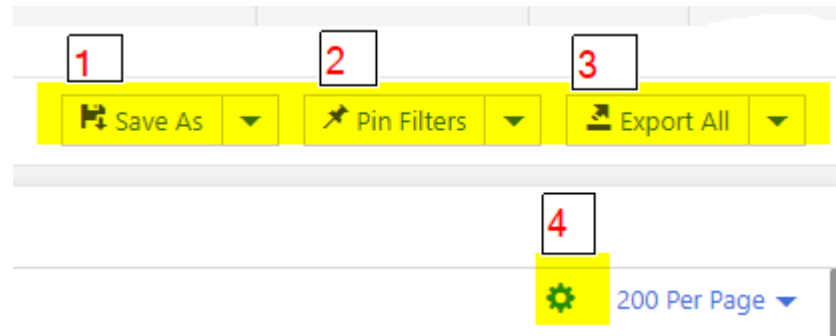
- By clicking on the "Pin Filters" button will be the default search setting every time the user logs in

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

The screenshot shows the 'Configure Column Display' dialog box overlaid on a search results table. The dialog box has a title bar with a gear icon and the text 'Configure Column Display'. Below the title bar, there is a text area explaining that the configuration applies to the current search and is saved. The dialog is divided into two main sections: 'Type to Filter Available Columns' on the left and a list of columns on the right. The left section contains a list of columns with checkboxes and asterisks. The right section contains a list of columns with up/down arrows and a trash icon. Annotations with callouts explain various features: 1. 'Save As', 'Pin Filters', and 'Export All' buttons in the top toolbar. 2. 'Pin Filters' dropdown menu. 3. 'Export All' dropdown menu. 4. Gear icon and '200 Per Page' dropdown. 'a' points to the 'Apply' button. 'b' points to the search results table. A red box highlights 'Account' and 'Department' in the table header, labeled 'Added Columns'. A red box highlights the trash icon next to 'Total Amount', labeled 'Delete a column'. A red box highlights the up/down arrows next to 'Total Amount', labeled 'Bump the priority of the column. The columns will display in the order from top to bottom'. A red box highlights the asterisk next to 'Additional Authorizer 2*', labeled 'Asterisk indicates that sort function is available'. A red box highlights the checkbox next to 'Account', labeled 'Click on boxes next to the description to include that column'. A red box highlights the text 'Type in a column to add into your search filter or scroll to choose', labeled 'Type in a column to add into your search filter or scroll to choose'. A red box highlights the text 'This will save your column configuration as your default', labeled 'This will save your column configuration as your default'.

Total Amount	Account	Department
374.78 USD	55030	12300
59.98 USD	55030	12248
388.75 USD	55210	13829
101.04 USD	56210	21700
182.20 USD	55040	21724
52.00 USD	55016	23800
68.03 USD	55030	15900
19.75 USD	55030	15900
449.00 USD	55030	23507
40.92 USD	57003	10836
	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 says 'Choose your saved search'. The form includes fields for 'Search Type', 'Search To Export *', 'Type *', 'Format', 'Screen Layout', 'Frequency *', 'Occurs Every *', 'On The *', 'Export Until *', and 'Starts On *'. A callout box says 'If option is available choose the format of your exported excel file' pointing to the 'Format' field. Another callout box says 'If option is available, choose the file type' pointing to the 'Type *' field. The 'Starts On *' field is set to '09/19/2020' with a calendar icon. A callout box says 'setup your schedule of when you would like to receive the file' pointing to the 'Starts On *' field. The 'Frequency *' is set to 'Monthly' and 'Occurs Every *' is set to '1 month(s)'. Below the form is the 'Manage Exports' section with a dropdown set to 'All Orders'. There are two buttons: 'Export Requests' (highlighted in yellow) and 'Export Schedules'. A blue box with the letter 'c' is next to the 'Export Requests' button. Below this, there is a 'Click to Filter' button and a 'Save' button. At the bottom, there is a 'Title' field with two entries: '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

