New BearBuy Elastic Search

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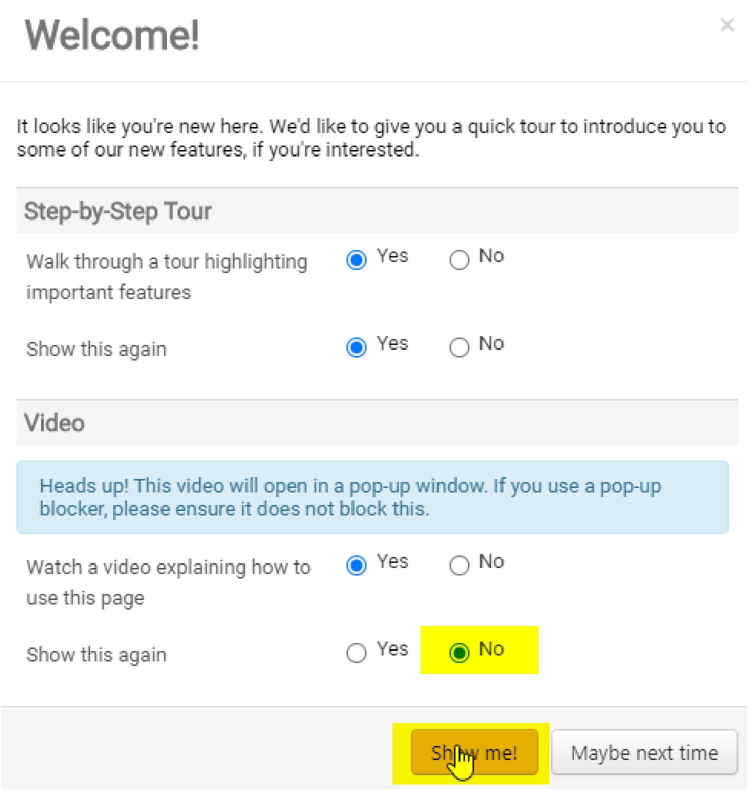
Accessing Training Video

- 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



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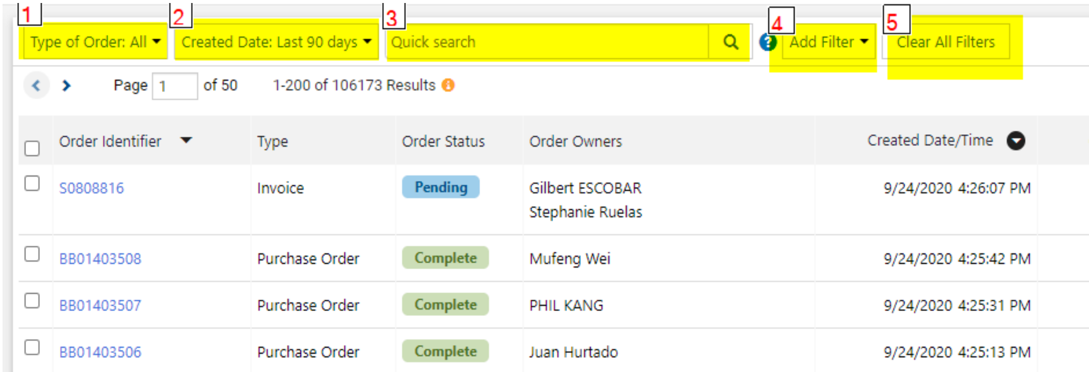
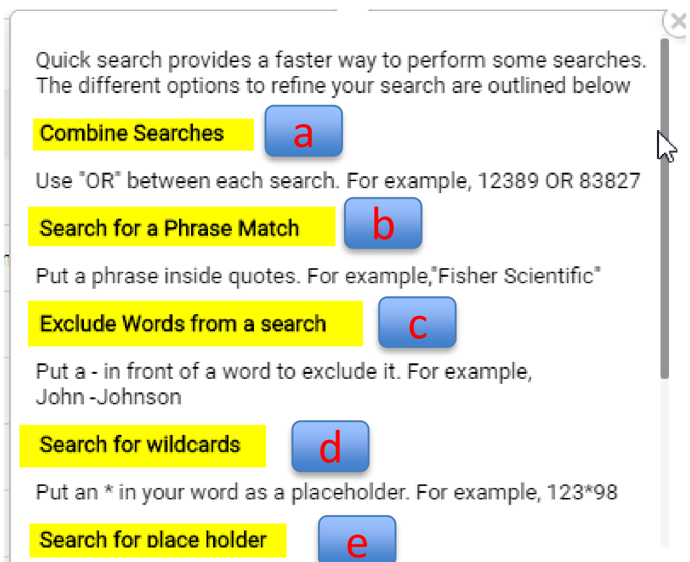
Simple Search (Slide 1 of 3)

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





Simple Search (Slide 2 of 3)

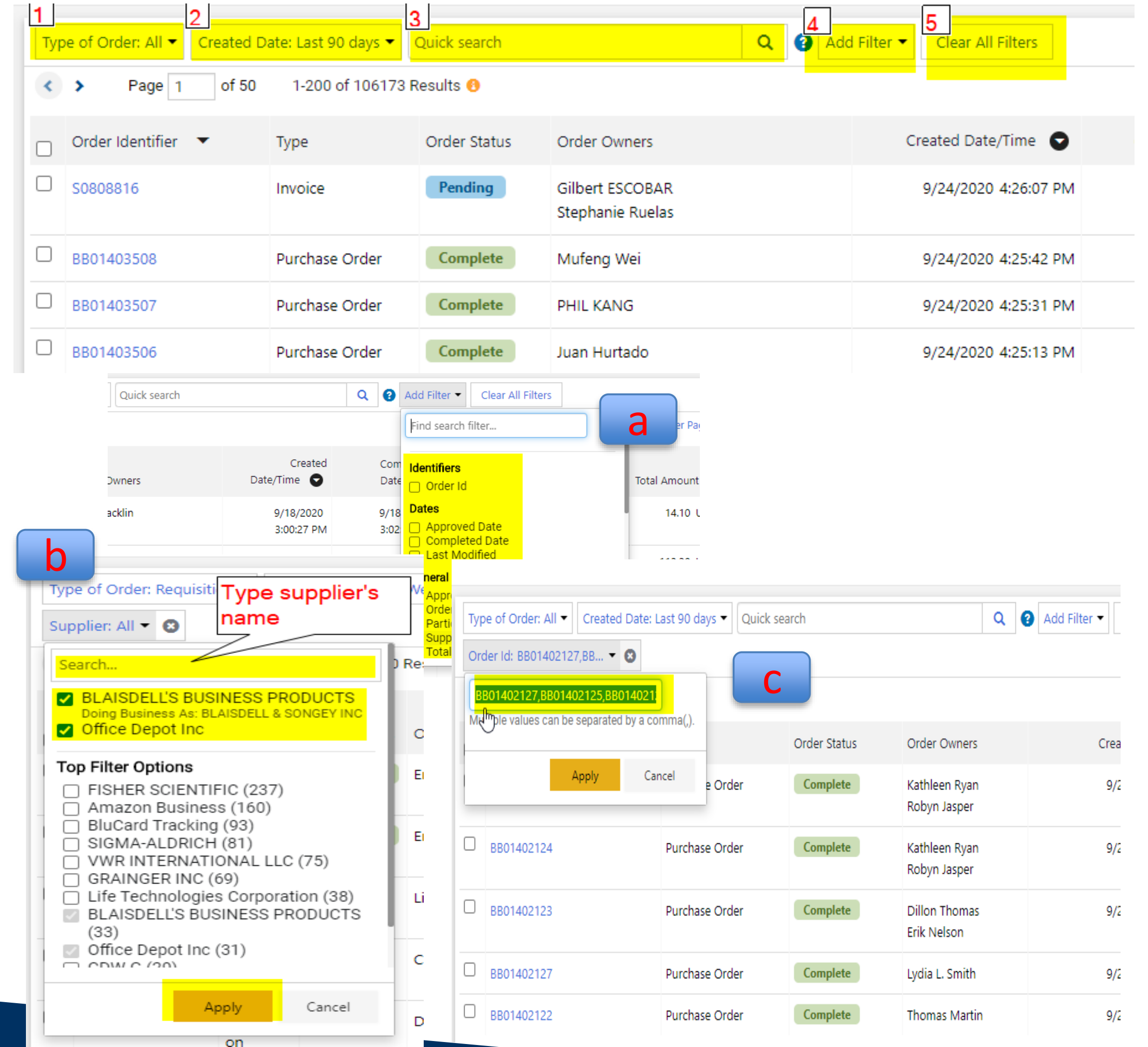
4. Quick Search filters to the right are filters that users can select to narrow down their search

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 in between each PO.

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



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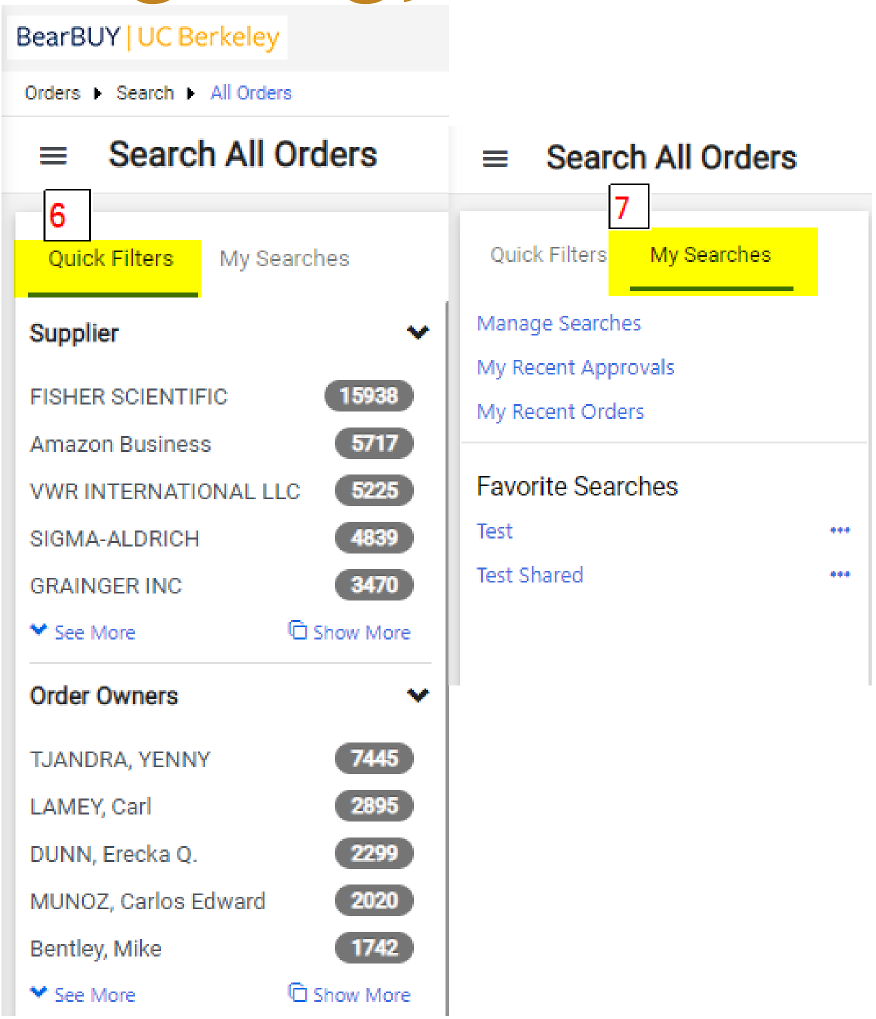
6. Allows users to filter out results by corresponding categories such as Supplier, Order Owners, Product Flags, etc.

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



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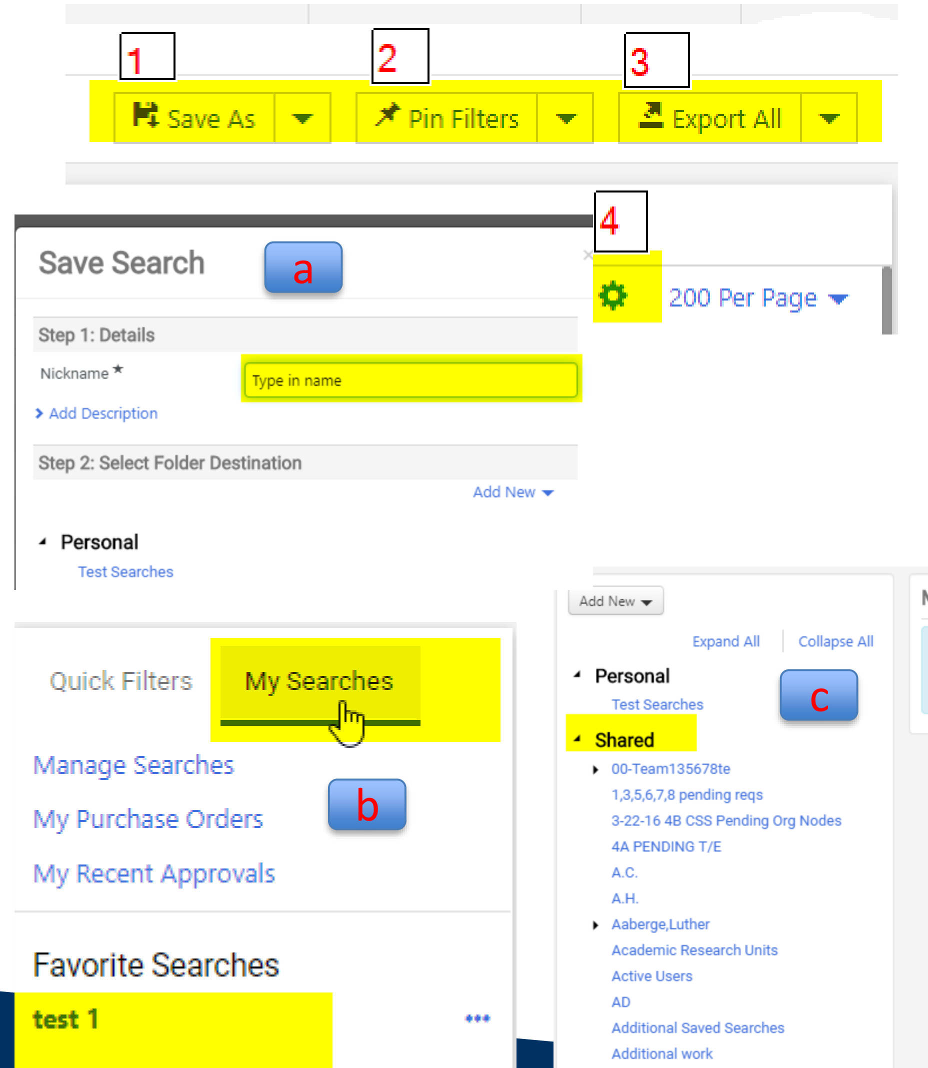
Advanced Search (Slide 1 of 5)

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



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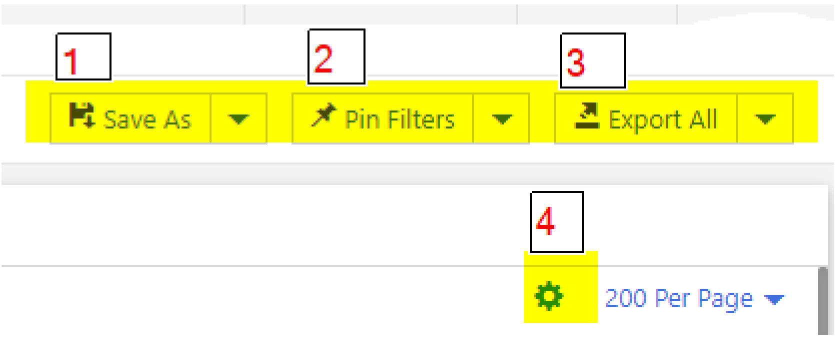
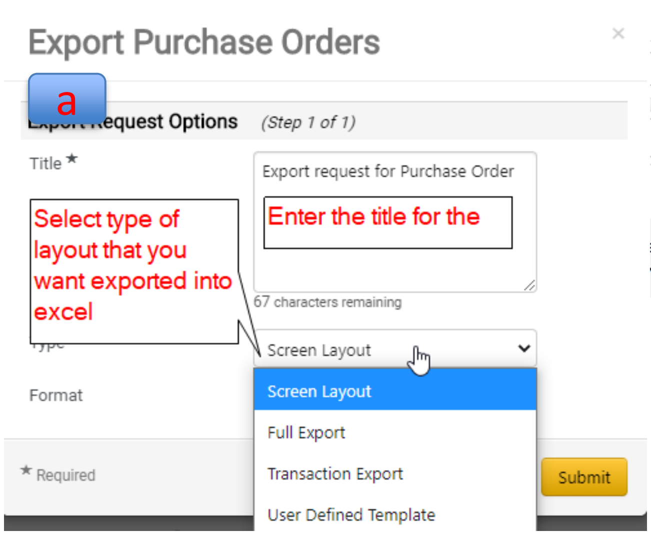
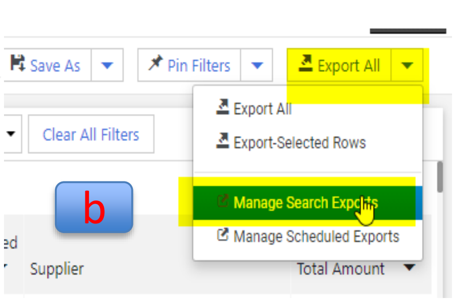
Advanced Search (Slide 2 of 5)

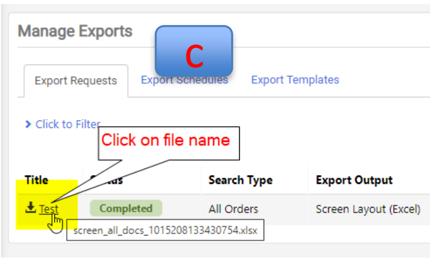
2. On the top-right hand corner users can save filters by Pinning them
- By clicking on the "Pin Filters" button will be the default search setting every time the user logs in

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









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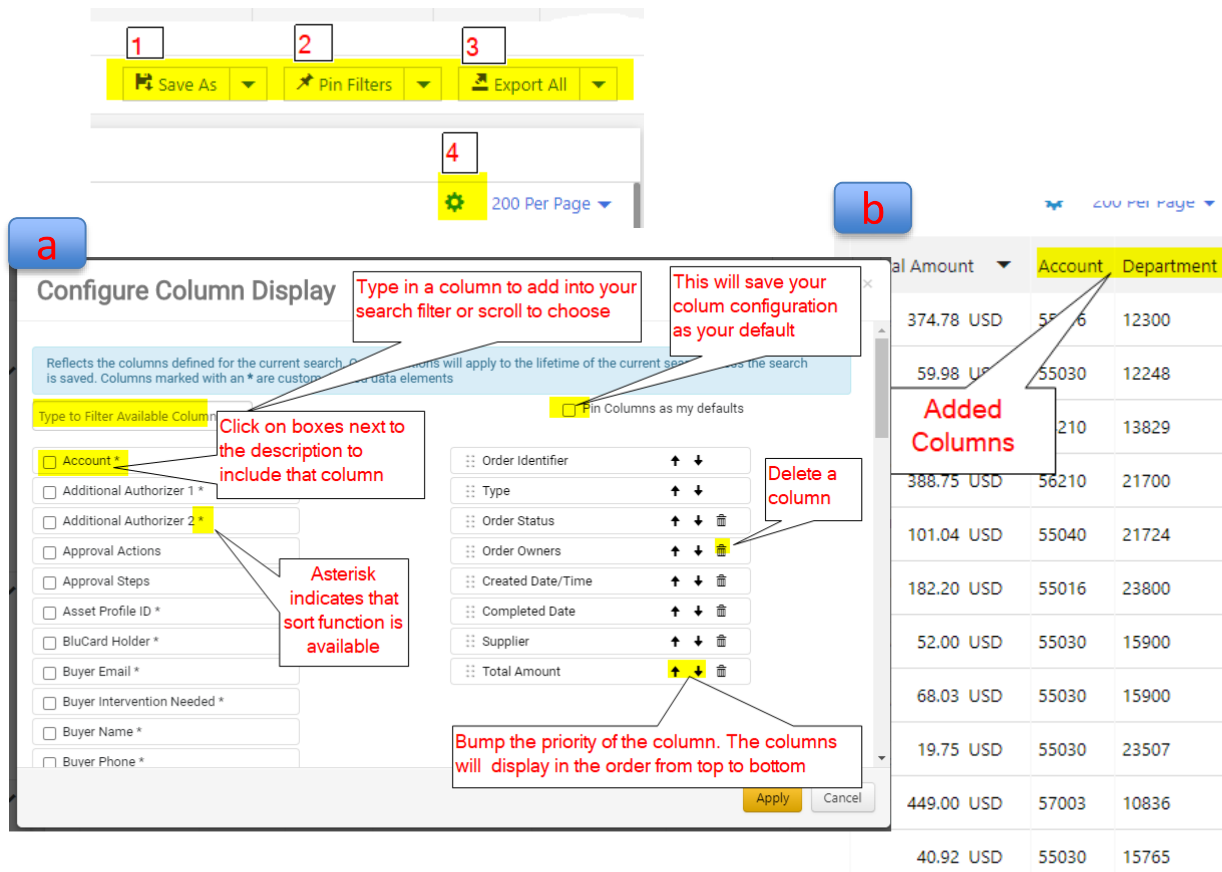
Advanced Search (Slide 3 of 5)

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



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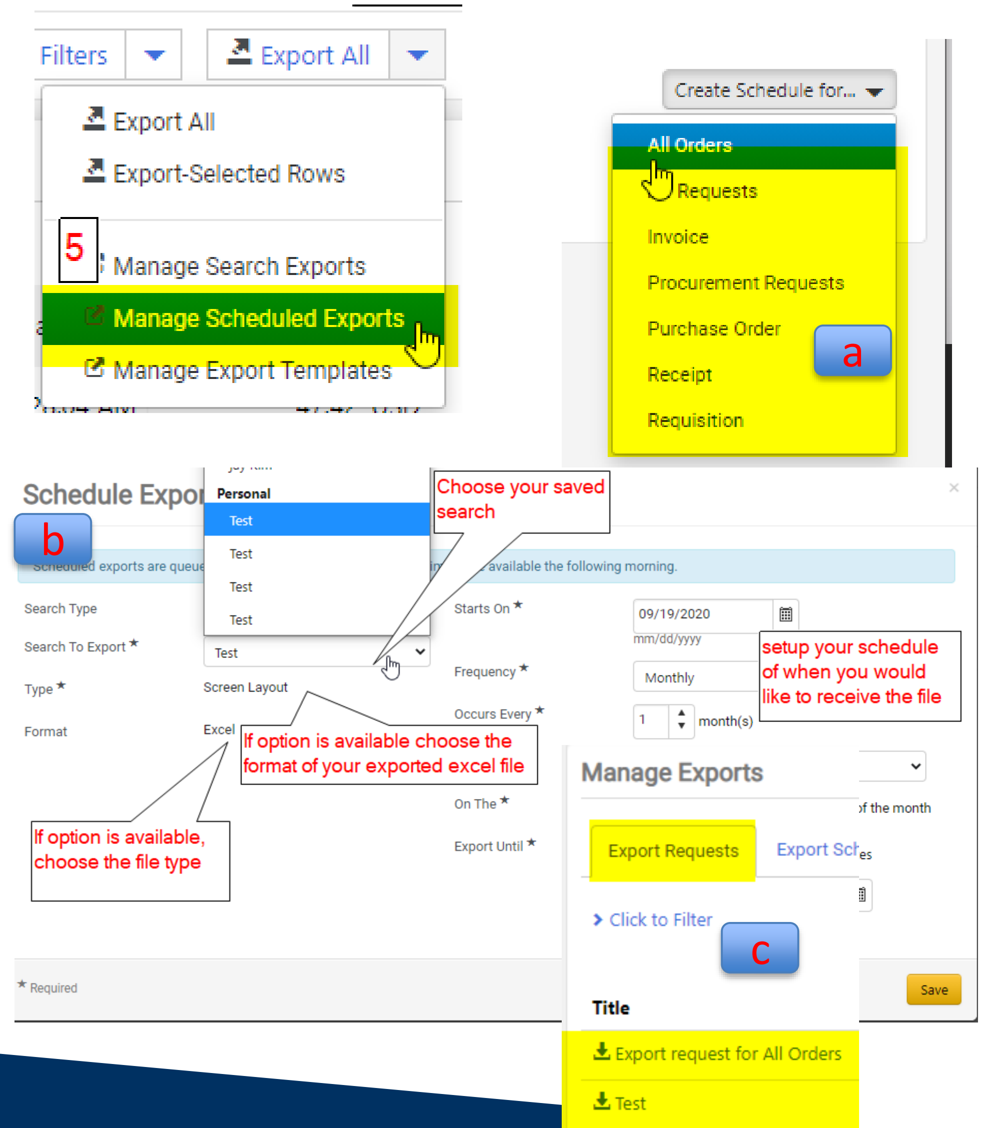
5. Manage Scheduled Exports will create scheduled exports to any document types as long as a saved search for that document type exists

a. To create schedule exports click on the down arrow next to the "Export All" >Manage Scheduled Exports > "Create Schedule for document type"

b. Click on "Create Schedule For" > click on the "transaction type"

c. To find your exported files click on the Export Requests tab



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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