ElasticSearch Guide

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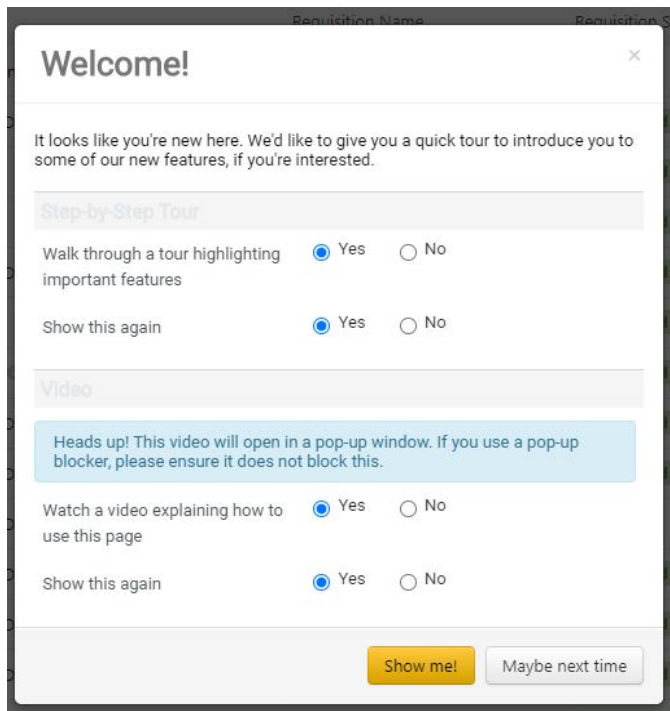
Accessing Training Video

1. Log into BB
2. On the left navigation panel click on the paper box > Search > Search Documents (Orders > Search > All Orders)
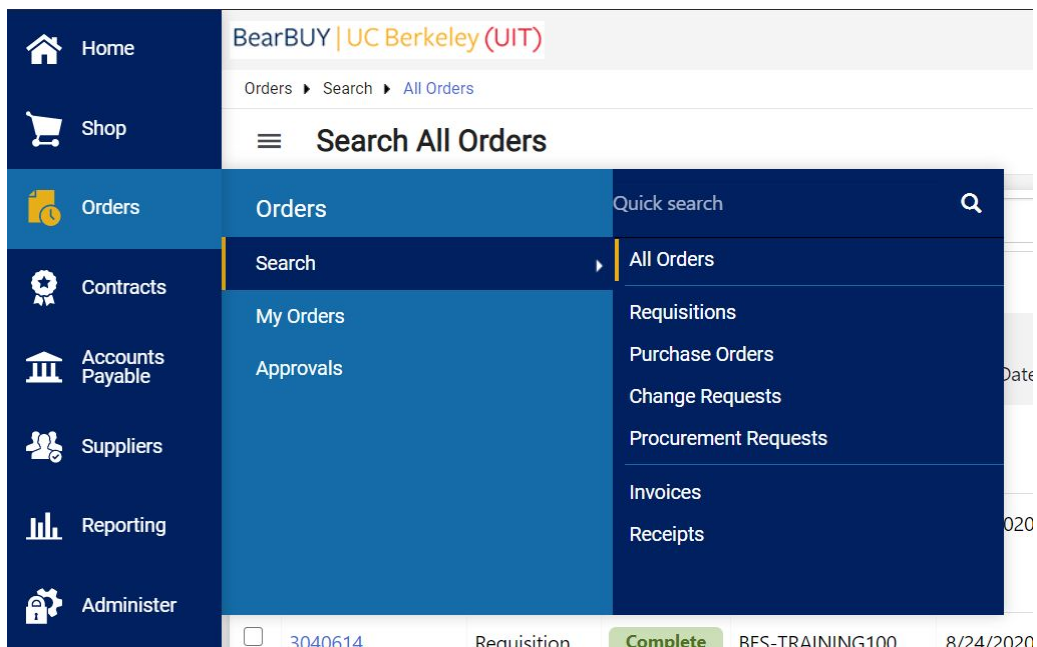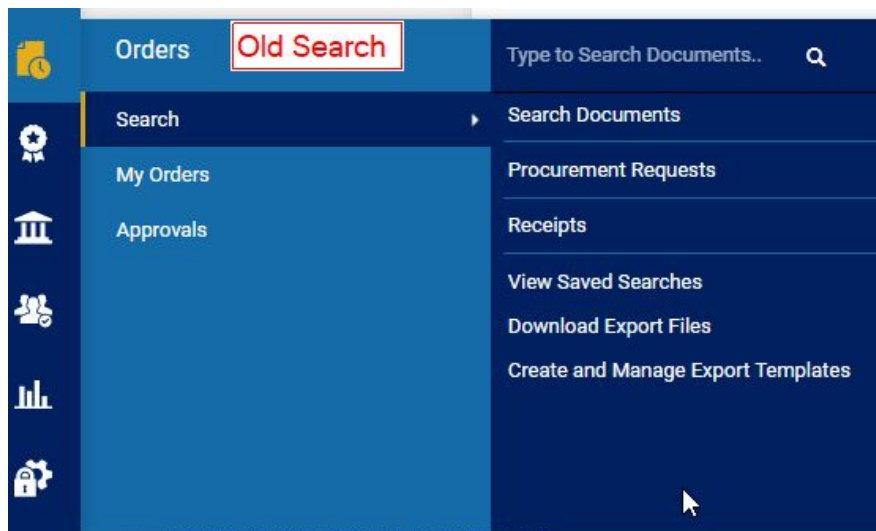
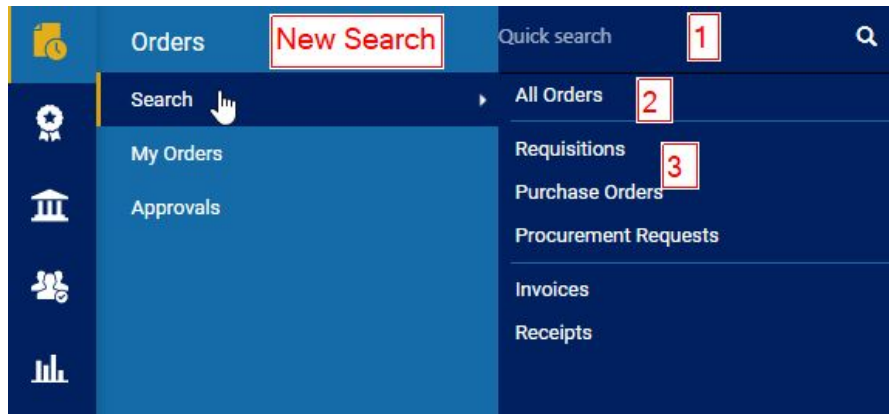3. A pop up window will appear that will display the following:

4. Click the show me button for tutorial
5. Follow Prompted Steps

Difference in side menu option:
Old Search
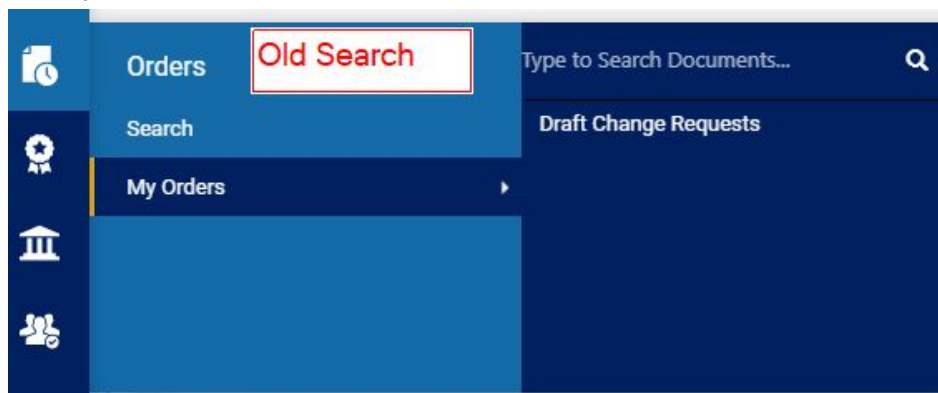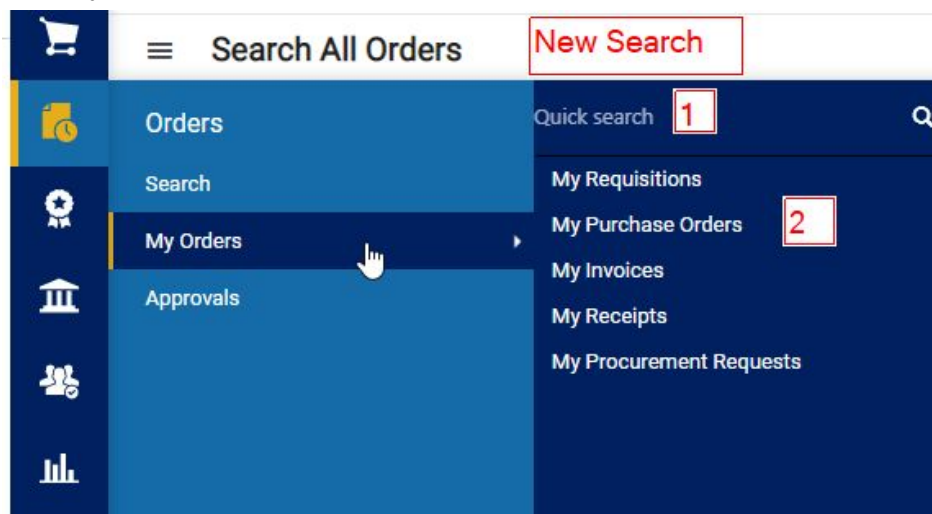

New Search

1. Quick Search replaces "Type to Search Documents…."
2. All Orders is a new selection that displays all order types (Req, PO, Voucher, etc.)
3. Users now have the ability to directly go to specific searches such as Requisitions, Purchase Orders and Procurement Requests
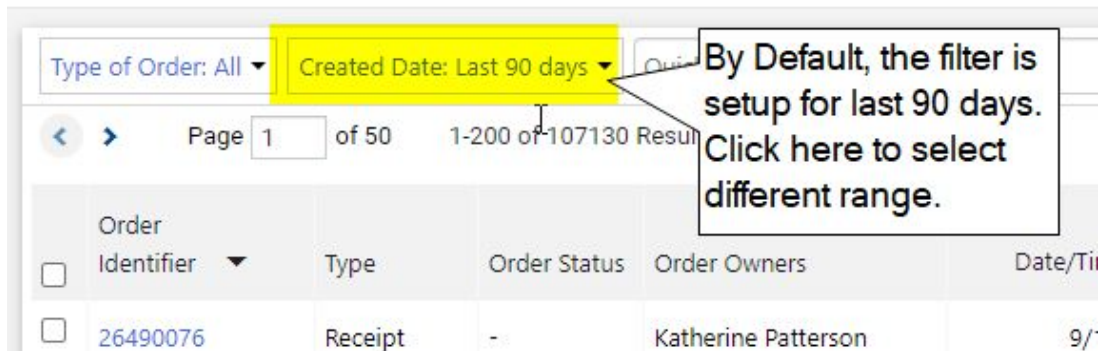
Old My Orders:

New My Orders:

1. Quick Search replaces "Type to Search Documents…."

2. Users now have the ability to click on specific searches for any of their transactions without having to navigate to another screen
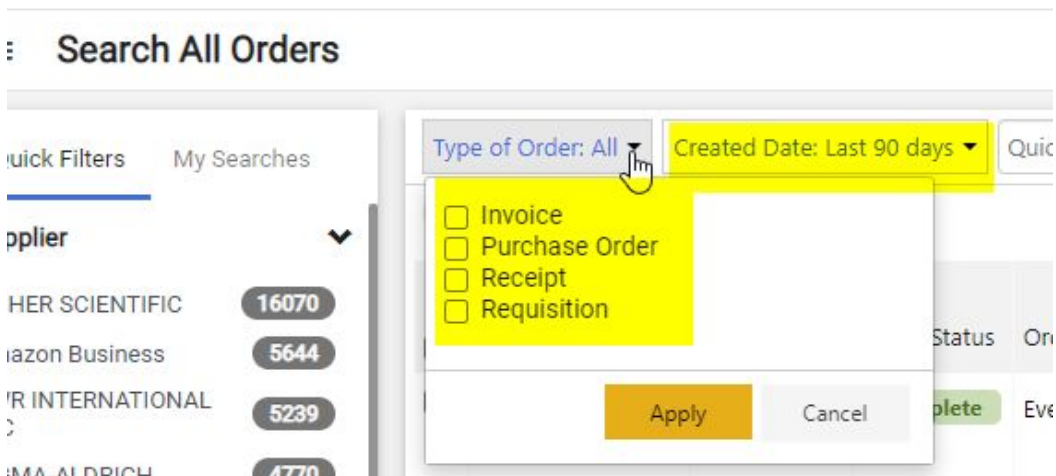
Approvals
1. The only function that changed was that Quick Search replaces "Type to Search Documents...."
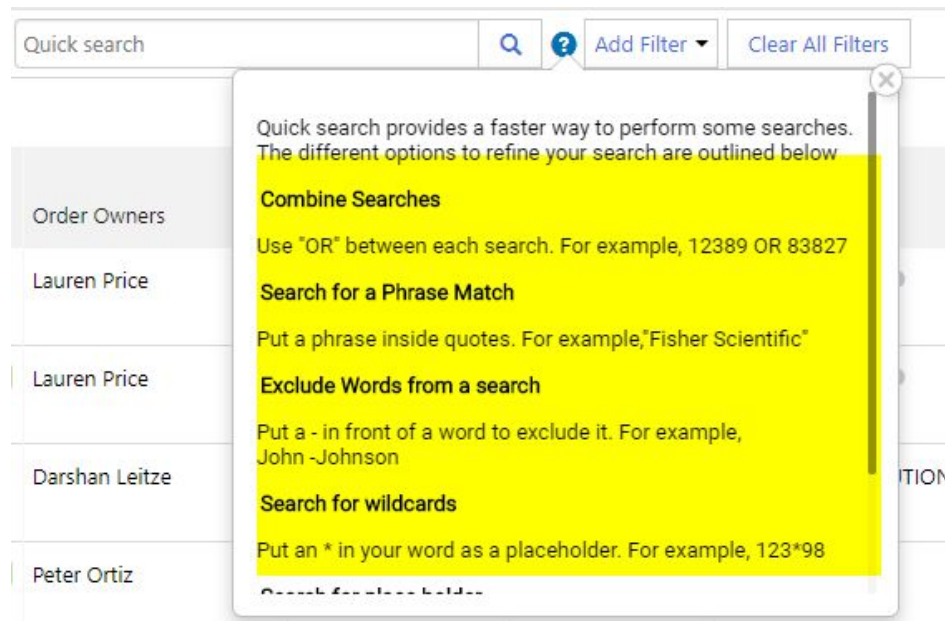
**Created Date**

Type of Order

1. In this section users can narrow down transaction results by clicking on "Type of Order"
2. Choose the type of Order to narrow down transaction type

Quick Search

1. Click on the Question mark button to display different search options
   i.   Combine Search Example: "BB12345678" or "BB24681012" or any combination of POs, vouchers, receipts, invoices etc
   ii. 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"
   iii. 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"
   iv. 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"
   v.   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"
   vi. *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 (see below)*
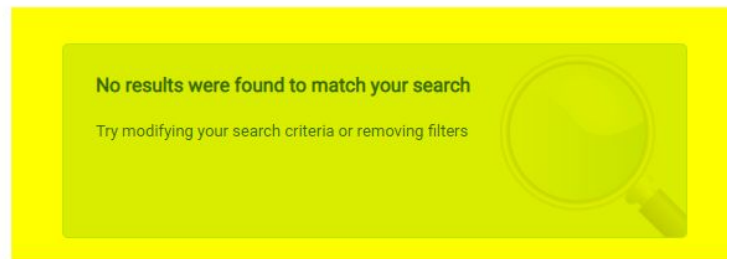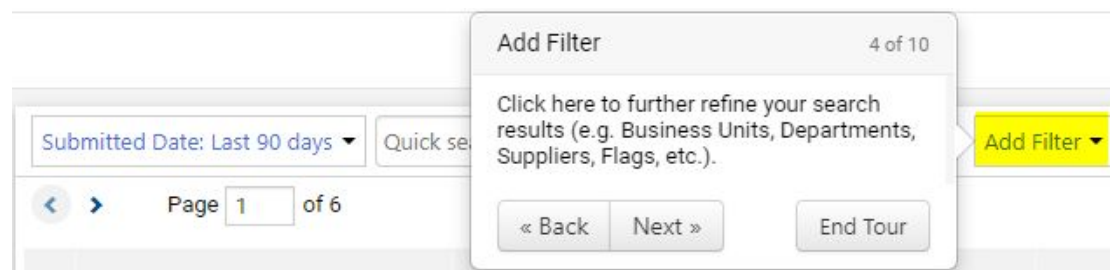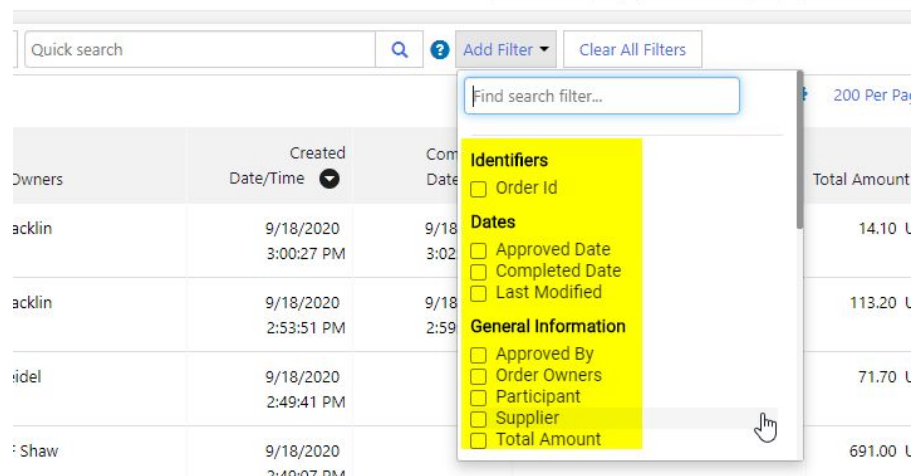
vii.

viii.   The mass search functionality can only be utilized by adding a filter

Add Filter

1. Below are filters that users can select to narrow down their search

2. 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

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

4. 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.

Pin FIlters

1. On the top-right hand corner users can save filters by Pinning them:
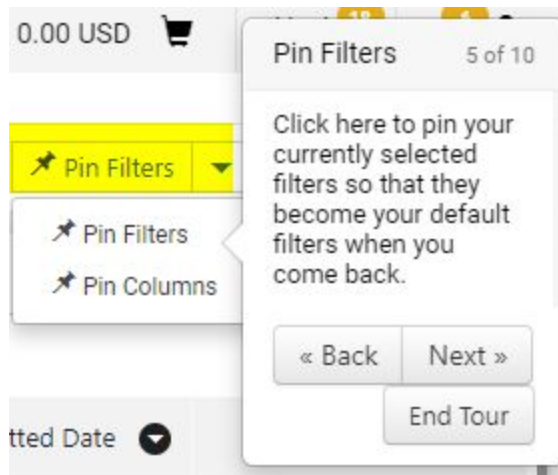
2. An example would be if the user wanted to see all requisitions created this week, they would click on the pin filters and click yes
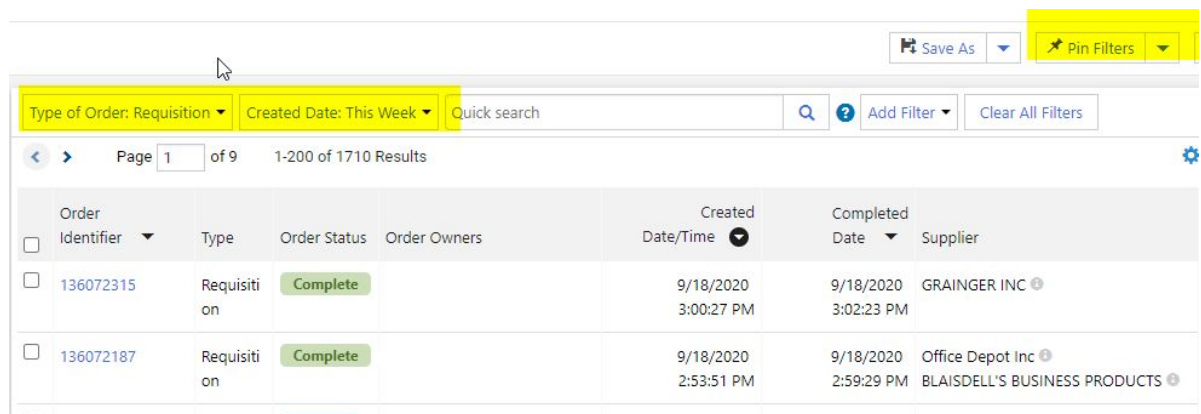
3. Now this will be the default search setting everytime they logged in

Clear All Filters:

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

Configure Columns (top right-hand corner):

Select the columns to display and the order in which they appear for your results.

« Back   Next »   End Tour   Tota
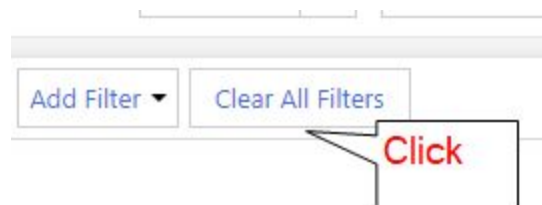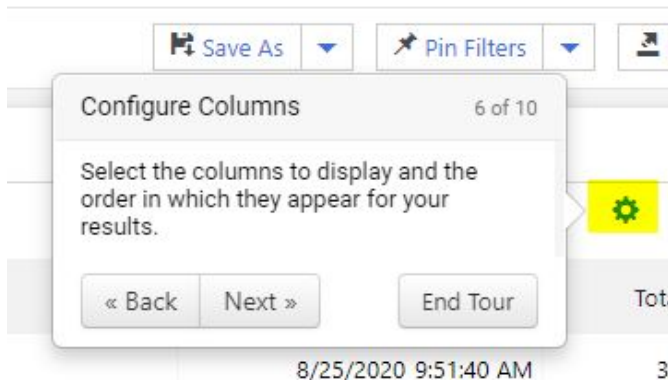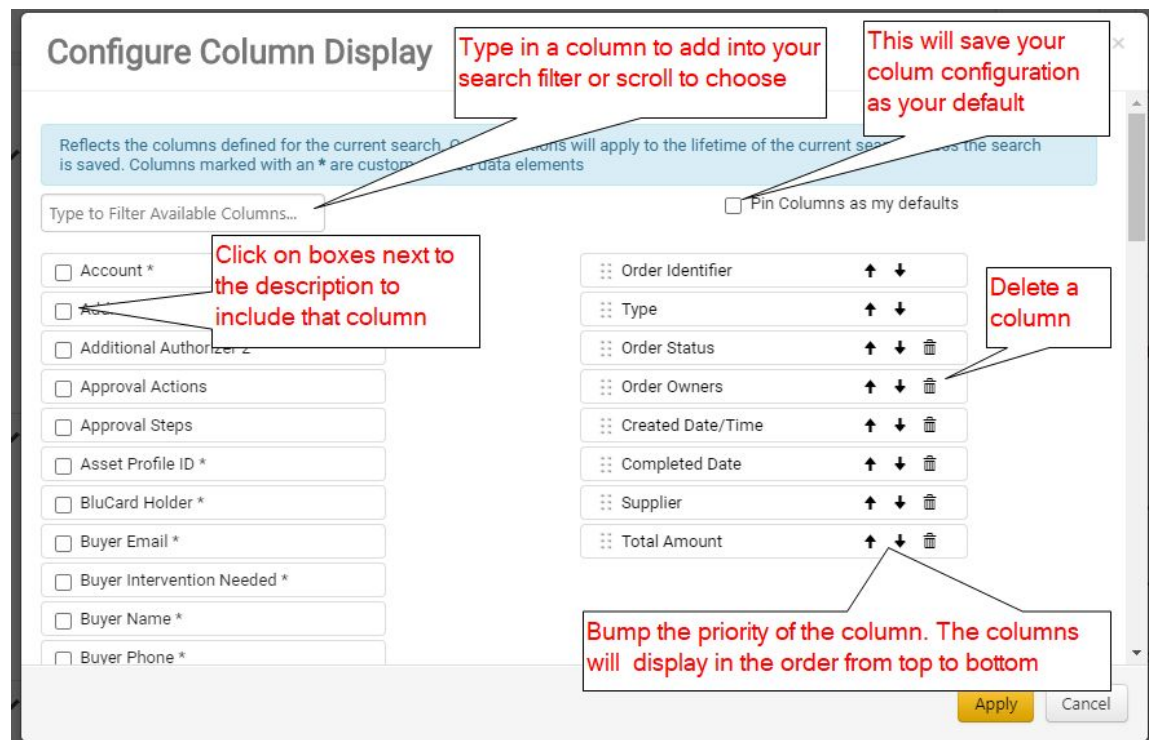
8/25/2020 9:51:40 AM   3

1. 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. See example below:

a. Click apply once desired columns are selected and it will display in the search
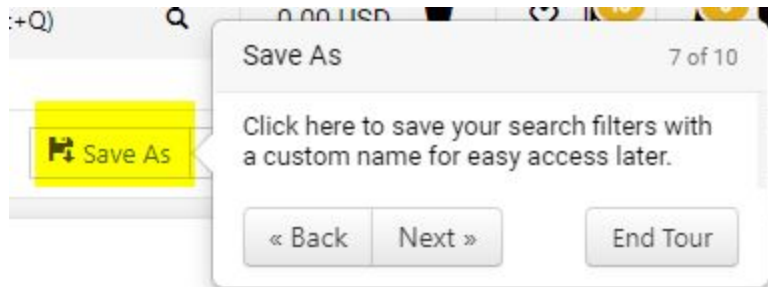b. Additionally, users have the ability to drag columns to the left and right of one-another in the search

c. The sort option is available for specific column types. See example below:

Created Date/Time	Completed Date	Supplier	Total Amount
9/18/2020	9/18/2020	GRAINGER INC ⓘ	27.54 USD

   d. Save the filter (see directions below)

Save As (top right-hand corner)

> **Save As** 7 of 10
>
> Click here to save your search filters with a custom name for easy access later.
>
> « Back   Next »   End Tour

1. Any search that users have created has the ability to save the custom search. In the custom search case below all orders and all purchase orders are displayed in the last 120 days

Search All Orders

Filters My Searches		Type of Order: Purchase Order ▾	Created Date: Last 120 days ▾	Quick search	Q

< >   Page 1   of 50   1-200 of 34120 Results ⓘ

		Order Identifier ▾	Type	Order Status	Order Owners	Created Date/Time ◉	Comp Date
SCIENTIFIC	4026						
Tracking	1815	☐ BB01401866	Purchase Order	Complete		9/18/2020 2:49:15 PM	9/18/2 2:49:3
n Business	1738						
TERNATIONAL	1340						
ALDRICH	1221	☐ BB01401865	Purchase Order	Complete		9/18/2020 2:48:16 PM	9/18/2 2:48:3
lore	⎙ Show More						

2. 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. In the case of a shared folder other users can access the search that was created by the user.

3. To access saved searches navigate back to the "My Searches" and click on the link/links under the "Favorite Searches"
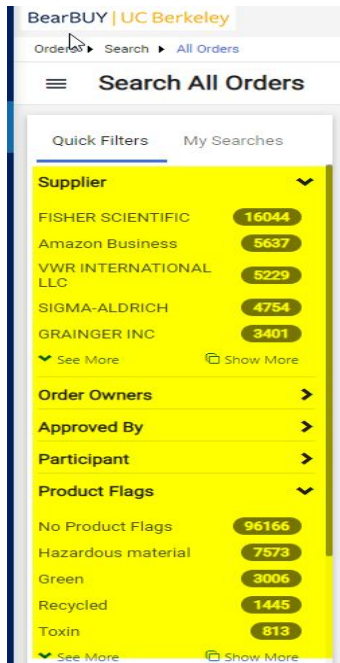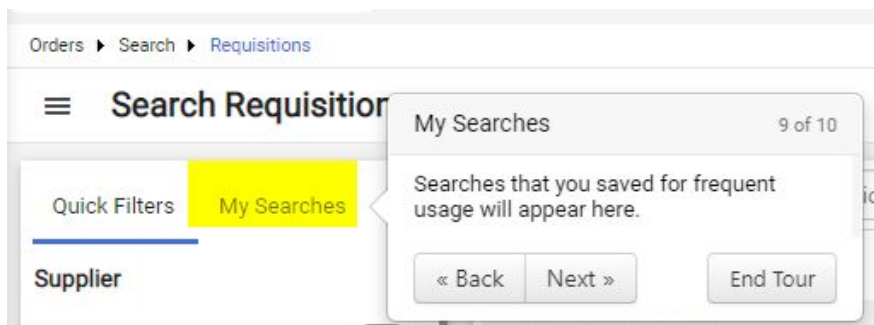4. To access a shared search navigate to "My Searches" > "Manage Searches" and click on the the shared search
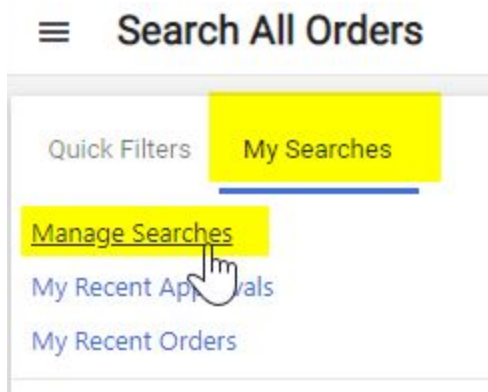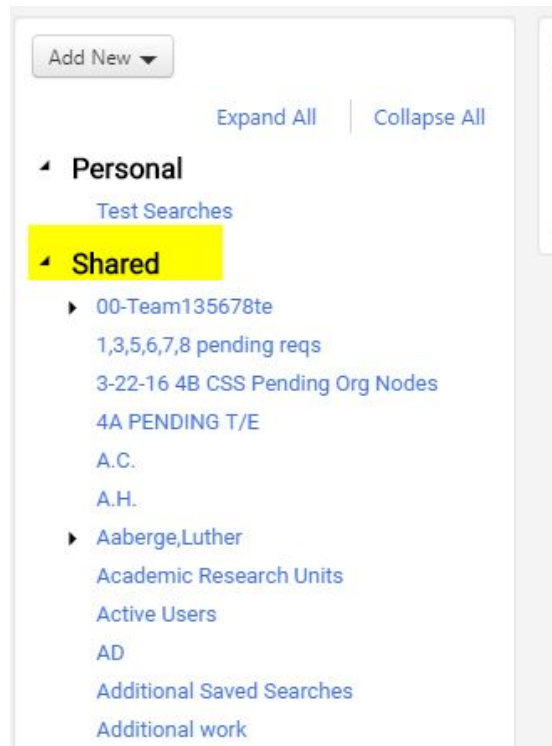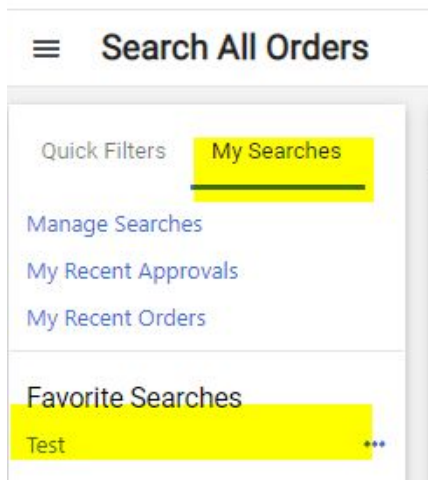
Quick Filters (top left-hand corner)
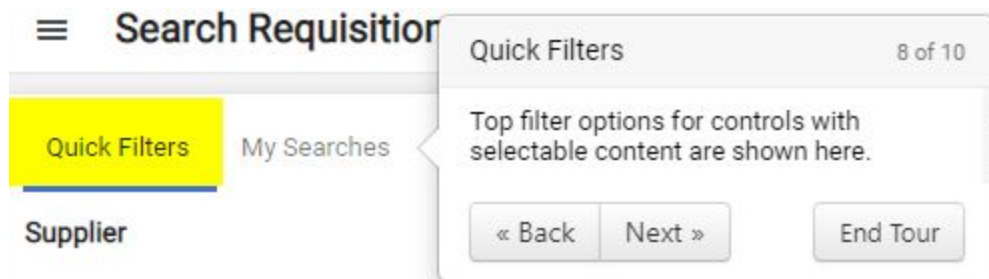
1. Allows users to filter out results by corresponding categories such as Supplier, Order Owners, Product Flags, etc.
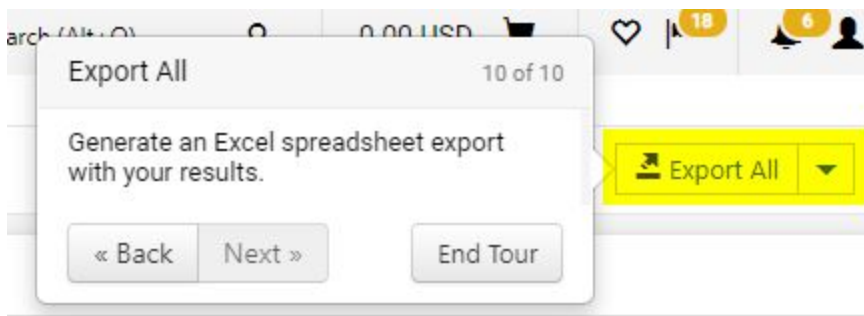
My Searches (top left-hand corner)

1. My Searches allows users to view any searches that have been saved by the user
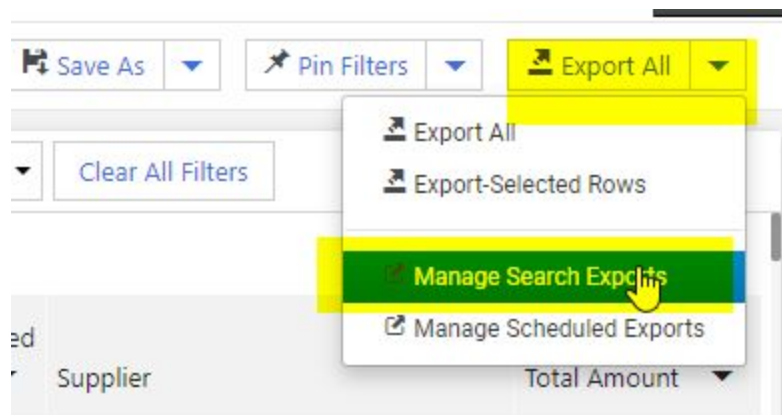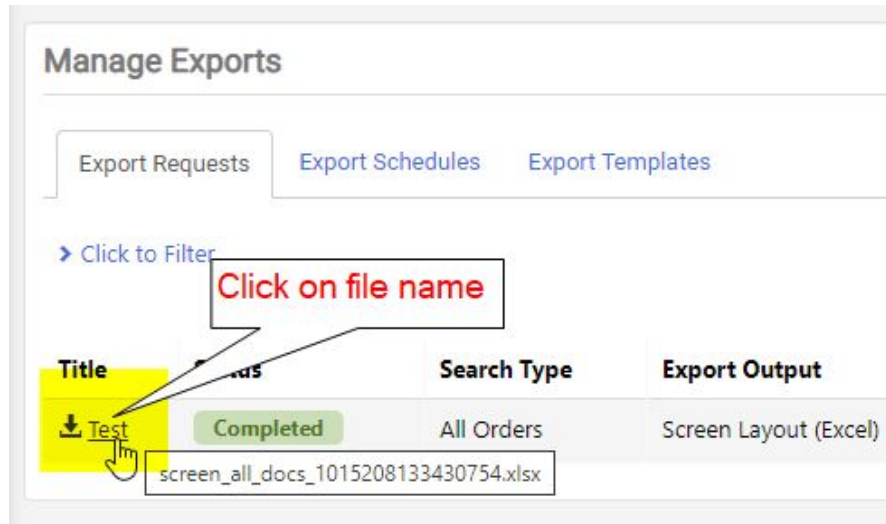
Export All (Top right-hand corner)

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

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

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

Manage Scheduled Export Schedules:

1. This will create scheduled exports to any document types as long as a saved search for that document type exists
2. To create schedule exports click on the down arrow next to the "Export All" >Manage Scheduled Exports > "Create Schedule for document type"
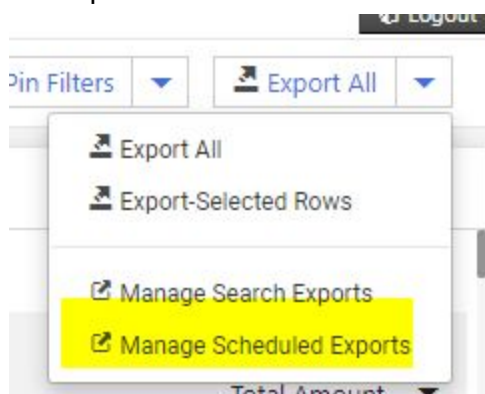
3. Click on "Create Schedule For" > click on the "transaction type" (keep in mind that a Search already has to exist for this to work)

Create Schedule for... ▼

All Orders
Requests
Invoice
Procurement Requests
Purchase Order
Receipt
Requisition

Schedule Expor

Personal
Test
Test
Test
Test

Choose your saved search

×

Scheduled exports are queue... ...available the following morning.

Search Type

Search To Export ★ Test ▼

Type ★ Screen Layout

Format Excel

If option is available choose the format of your exported excel file

If option is available, choose the file type

Starts On ★ 09/19/2020 📅
mm/dd/yyyy

setup your schedule of when you would like to receive the file

Frequency ★ Monthly

Occurs Every ★ 1 ⬍ month(s)

By the Week and Day of the Month ⌄

On The ★ First ⌄ Monday ⌄ of the month

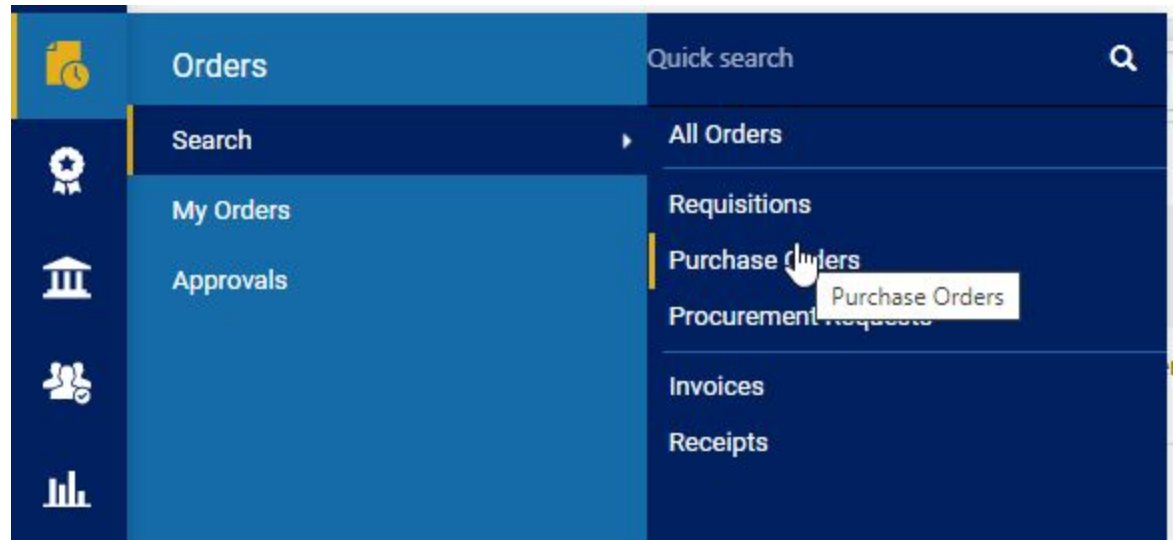Export Until ★ ⦿ Ends After 1 ⬍ occurrences

○ Ends By 📅

○ No End Date

★ Required Save

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

Export Requests Expo

❯ Click to Filter

Title	Status
⬇ Test	Completed

Taking action on a transaction from search

1. Navigate through the Orders left side bar and choose a Purchase Order

2. Once the results appear, there will be three dots next to each transaction number. Click on it and the following will display:
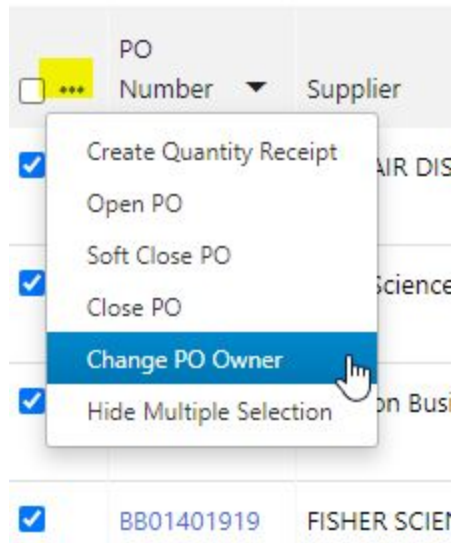

3. Once any of the options are clicked, users can complete that specific transaction

4. Additionally, if the user clicks on the three dots (next to PO Number column) it allows users to click multiple PO's and complete a specific transaction
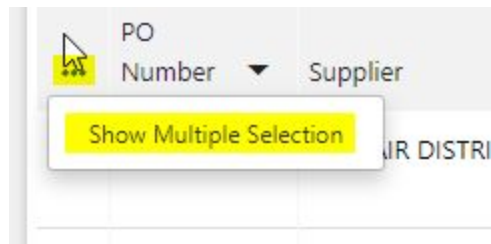
a.

b. Click on all the PO's, click the three dots again and then choose the transaction type

c.

Granting Access

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