Searching for Documents in Marketplace

You can now preform extensive searches in Marketplace using various filters and search parameters. Save and pin these searches for easy access in the future. If you are not assigned the Requestor role in Marketplace, you must have the Inquirer role to search all documents.

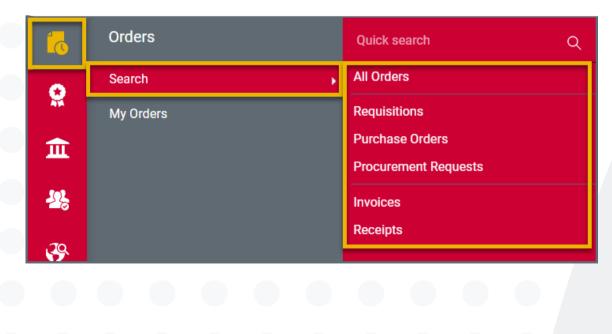


To do a simple search, enter a number or keyword in the top right hand corner of Marketplace.

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To do a search with filters, access the search feature on the left side of Marketplace under Orders > Search. Choose which type of document you need to search.

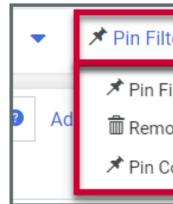




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Upon selecting what type of document you wish to search, you will be taken to the mass search screen. By default Created Date: Last 90 days will be the initial filter. Click on the filter to refine the search parameters as seen below and hit <u>Apply.</u> You can add as many filters as you want by clicking the check box next to any of the available filters on the right side. You can also search for a filter. Once a filter is added, an overlay to refine that filter will appear. You can also utilize <u>Quick Filters</u> on the left side. Delete any filter by <u>clicking the X</u> next to the filter on top of the search results field.

Created Date: Last 90 days 👻 Quick search	Add Filter Clear All Filters	
O All	Add Filter Clear All Filters ?	Quick Filters My Searches
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O Date is Missing	Order Id	Amazon.com 10498
O After ✓ 🗐	Dates	VWR International 9295
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To keep specific filters and search	P 🔲 Participant	450-6015 (NB SAS-Life
parameters as your default, click Pin	Pending Approver	Sciences)
Filters in the top right corner. This will	P Supplier	900-1405 (Cent Unit-IP&0 Supp Serv) 3871
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can also <u>Remove Pinned Filters</u> or <u>Pin</u>	Item Details	Rutgers Employee
Columns from this menu as well.	Catalog Number (SKU)	(Rutgers Employee) 154368
	Commodity Code Product Description	No Department 50962
	Product Description Product Flags	Student Worker (Student
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🗢 📝 Pin Filters 💌 💆 Expo	□ Order Status	Temporary Employee (Temporary Employee) 65
	Status Flags	Guest (Guest)
🖈 Pin Filters	Custom Fields	✓ See More
Ad 🛱 Remove Pinned Filters	Account	Order Owners >
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University Procurement Services Training

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Sorting and Configuring Columns

Once you have obtained search results, you can further sort and manage the type of information you see. <u>Click the arrow</u> next to certain columns to sort by ascending or descending. Click the <u>gear icon</u> in the top right to configure the overall column display.

Order		Order Status	Order Owners	Created Date/Time	Completed Date		Total Amount
\dd Filter ▼	Clear All Filte	rs	?	Configure Column Display			×
			Page 🔻	Reflects the columns defined for the currer unless the search is saved. Columns marke			of the current search
ou can a	<u>ure Colur</u> dd colum	ins of	f data	Type to Filter Available Columns	Л	Pi	n Columns as my defaults
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Hit <u>Apply</u> once you are done picking and sorting your columns. By default, the updated selected and sorted columns only display for the life of the current search. To save these changes in perpetuity, make sure to check off <u>Pin columns as my defaults.</u>

Exporting and Saving Searches

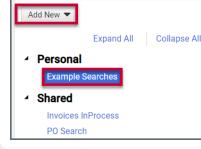
When you perform a document search you may want to export the results for further reporting and analysis. Click <u>Export All</u> or <u>Export Selected Rows</u> in the top right of the page to begin exporting your search as an Excel .CSV file.

The exported files are available under <u>Manage Search Exports</u> in the same menu. Click on the export to download it. The file is available for a week until it expires. You can view the expiry date under the <u>Available Until</u> column.

Manage Exports								?
Export Requests Export Schedules	Export Templates							
> Click to Filter							Refre	esh this Page 🔻
Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
	Completed	All Orders	Screen Layout (Excel)	4/1/2022 2:39:13 PM	4/1/2022 2:39:42 PM	4/8/2022	Total Records: 4867	Delete

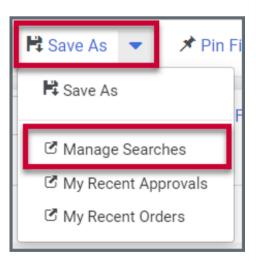
Along with exporting you can also save your current search filters for use again at another time. Please note that when you execute a saved search the dates will be relative, meaning the last 30 days would be from the date of report execution instead of the date that the report was saved.

To save a search click the <u>Save As</u> button in the top right. You must create a folder to store your search, and you can organize and view your saved searches under <u>Manage Searches</u>. Searches can be <u>deleted</u>, <u>moved</u>, <u>copied or modified</u> from the Manage Searches page.



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Filters 🔻 💆 Export All 💌	
Z Export All	
Export Selected Rows	
C Show Printable Results	
🗷 Manage Search Exports	
Manage Scheduled Exports	



Exa	mple Searches	Folder Actions 🗨 ?			
		Actions for Selected Favorites 🔻			
	Example Search Type: All Orders	Remove Shortcut Export Go			