

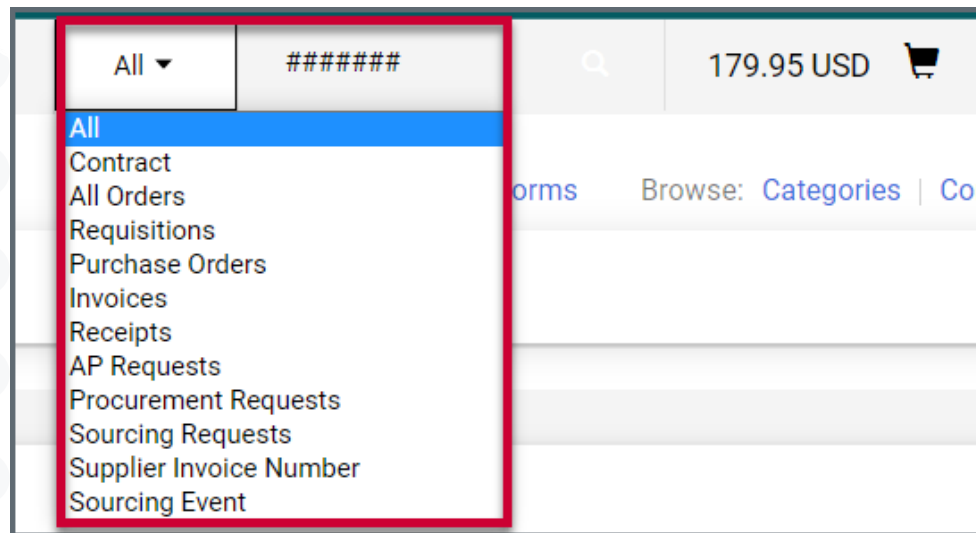
Searching for Documents in Marketplace



You can now perform 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.

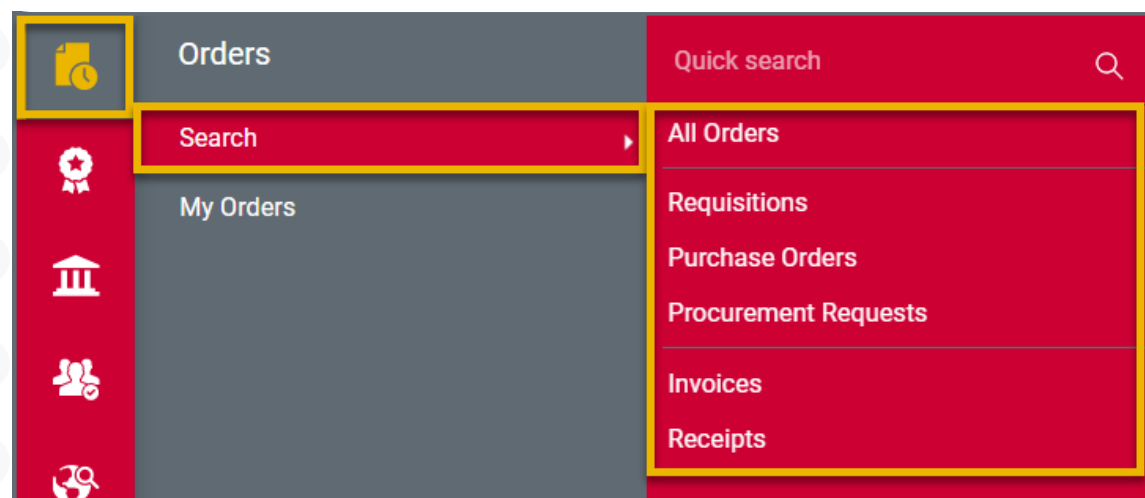
1

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



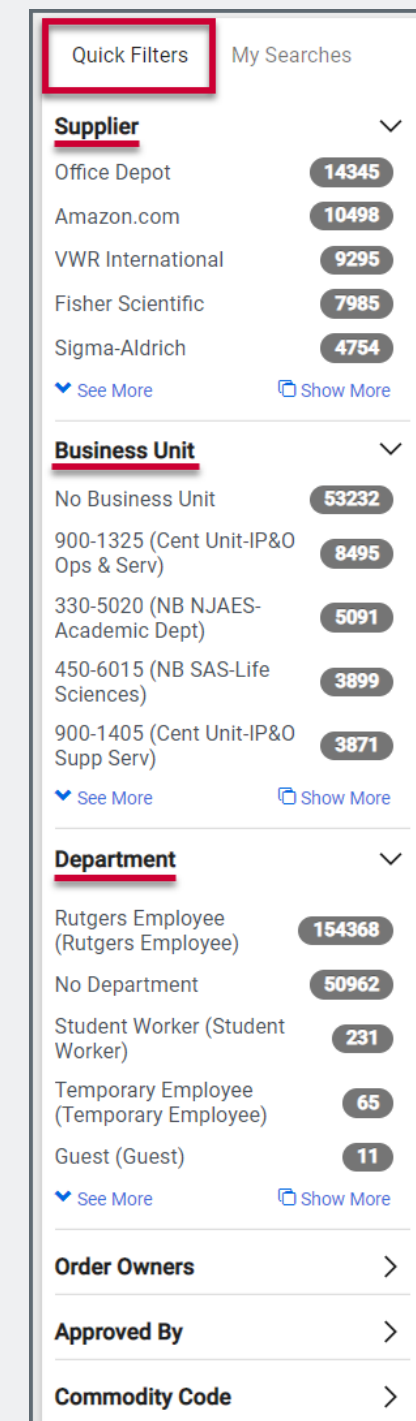
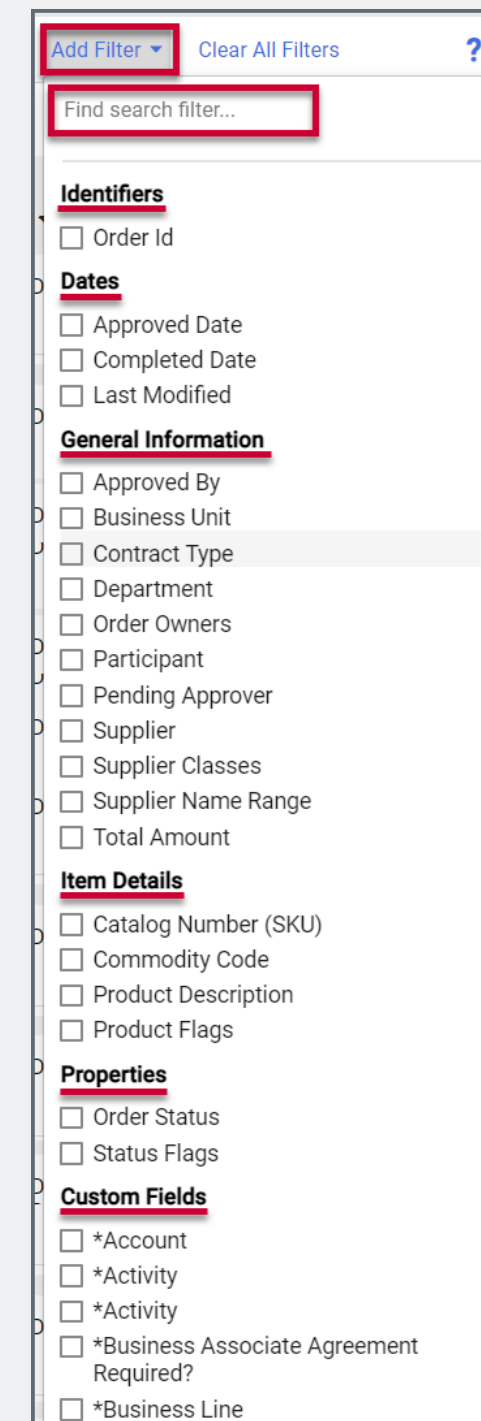
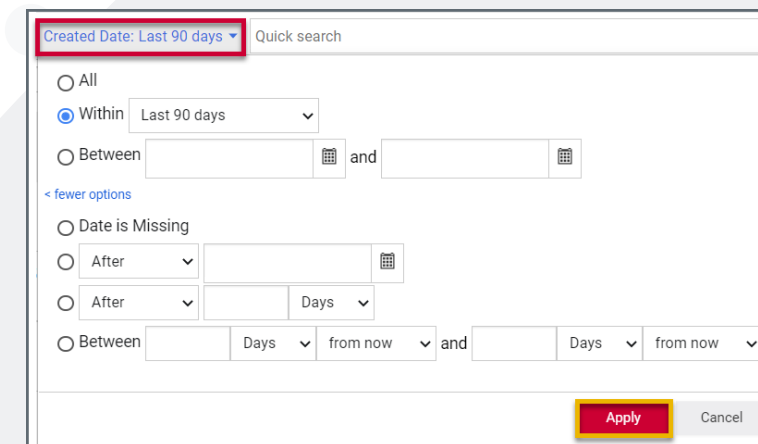
2

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.



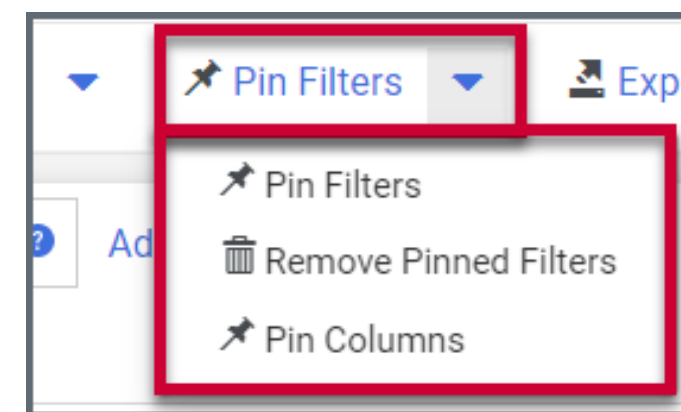
3

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 Apply. 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 Quick Filters on the left side. Delete any filter by clicking the X next to the filter on top of the search results field.



Pinning Filters

To keep specific filters and search parameters as your default, click Pin Filters in the top right corner. This will hold your search regardless of if you navigate away from the page. You can also Remove Pinned Filters or Pin Columns from this menu as well.





Sorting and Configuring Columns

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

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
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Add Filter Clear All Filters 200 Per Page

Configure Column Display

Reflects the columns defined for the current search. Customizations will apply to the lifetime of the current search unless the search is saved. Columns marked with an * are custom defined data elements

Type to Filter Available Columns...

- 3rd Party Invoice Number *
- Account *
- Activity *
- Activity *
- Approval Actions
- Approval Steps
- Bill To
- Business Associate Agreement Required? *
- Business Line *

- Order Identifier
- Type
- Order Status
- Order Owners
- Created Date/Time
- Completed Date
- Supplier
- Total Amount

Pin Columns as my defaults

Apply Cancel

In **Configure Column Display** you can add columns of data to your search results by **clicking the boxes** on the left or searching for available columns.

On the right you can organize the column order by **clicking and dragging the dots** next to the column, or by using the **up and down arrows**. This will sort the order in which they display on the search results page. Delete a column by clicking the trash can.

Hit **Apply** 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 **Pin columns as my defaults**.

Exporting and Saving Searches

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

The exported files are available under **Manage Search Exports** 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 **Available Until** column.

Filters Export All

- Export All
- Export Selected Rows
- Show Printable Results
- Manage Search Exports**
- Manage Scheduled Exports

Manage Exports

Export Requests | Export Schedules | Export Templates

[Click to Filter](#) Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for All Orders	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 **Save As** button in the top right. You must create a folder to store your search, and you can organize and view your saved searches under **Manage Searches**. Searches can be **deleted, moved, copied or modified** from the Manage Searches page.

Save As Pin Filter

- Save As
- Manage Searches**
- My Recent Approvals
- My Recent Orders

Example Searches

Add New Expand All Collapse All Folder Actions

- Personal
 - Example Searches**
- Shared
 - Invoices InProcess
 - PO Search

Example Search
Type: All Orders

Remove Shortcut | Export | Go | Edit | Move | Copy | Delete