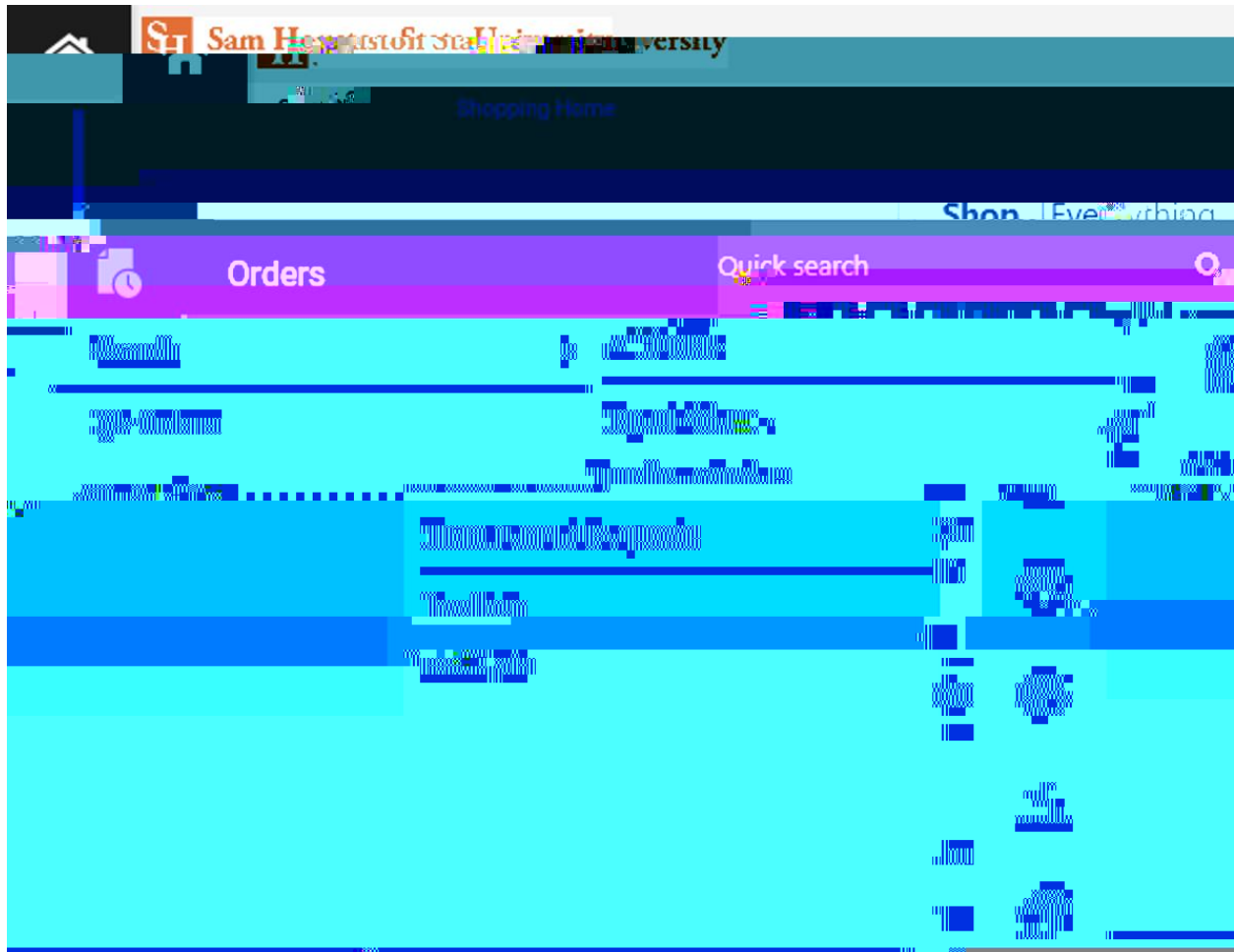


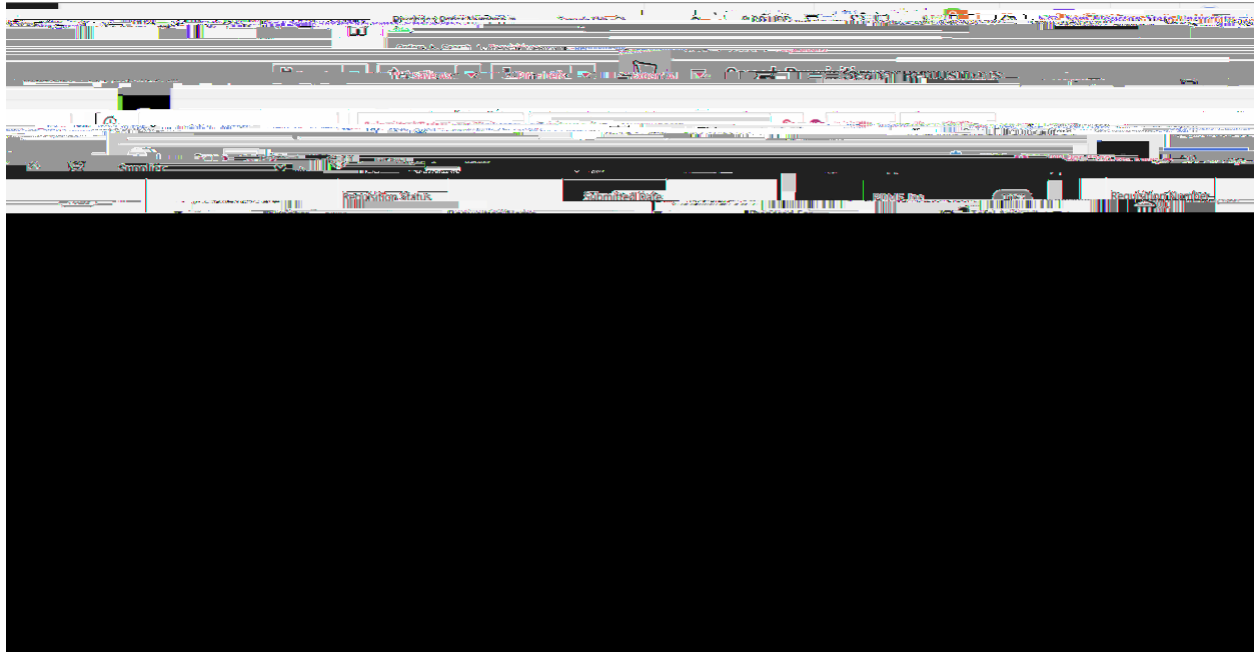
" M " ) ' 0

## To search for documents

In the new BearKatBuy search experience, click on the icon that is a paper with a clock on top of it. A menu will appear to the side. Hover over the Search and options will appear to the right. To search for Requisitions click on Requisitions.

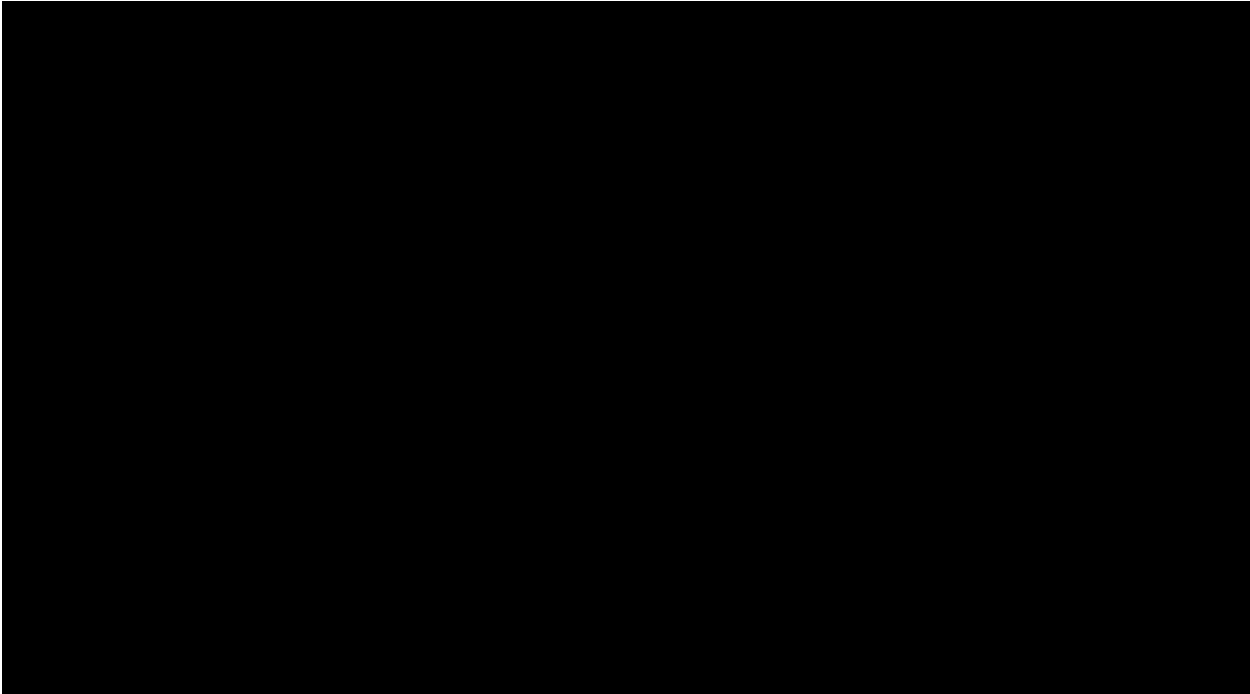


The requisitions for all of Sam Houston State University over the last 90 days will appear. The format of the listing will be Requisition Number, Supplier, Requisition Name, Requisition Status, Prepared For, Submitted Date, and Total Amount. The Requisition Status will be Pending or Completed. To begin filtering Requisitions the menus on the left side of the screen can be used. Using Supplier, you can click on one of the options on the initial listing or click on the Show More button.

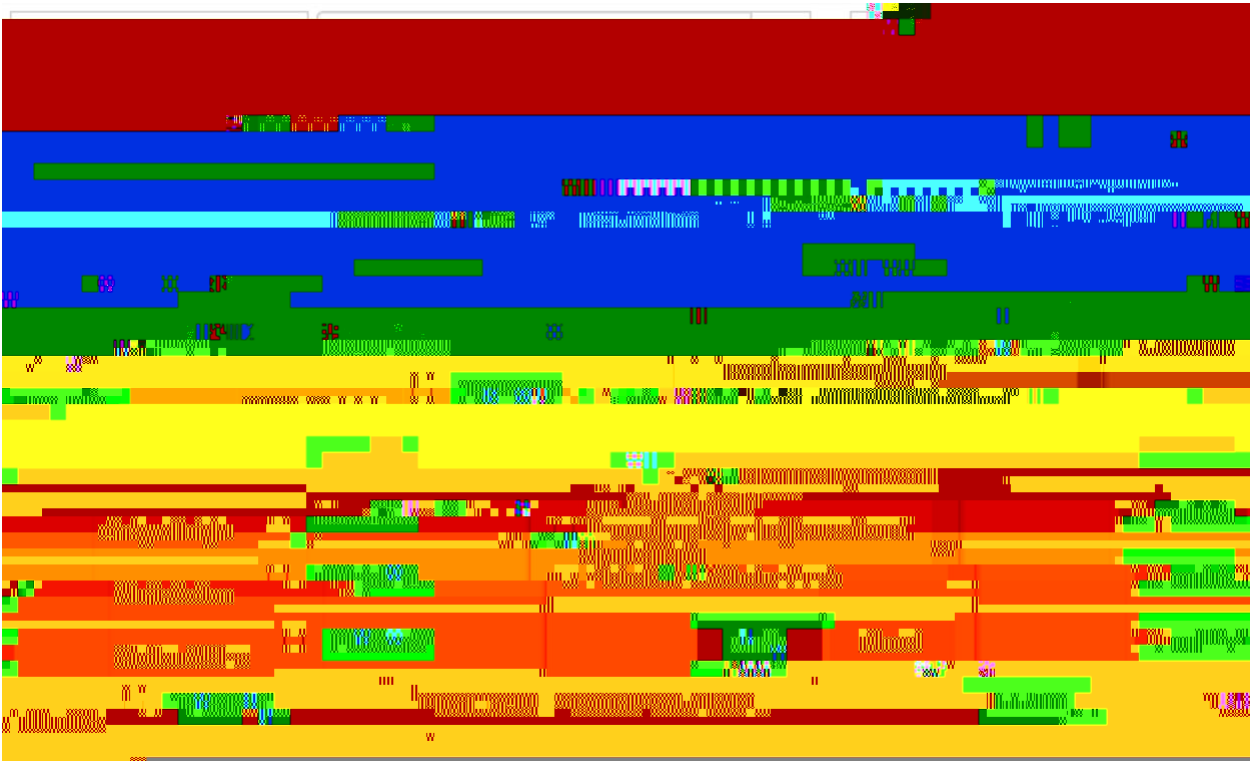




Filters can also be chosen using the Add Filter option. Click on the Add Filter dropdown and a myriad of choices will appear to filter the documents by in the listing. Click the checkbox next to the filter option that will be used.



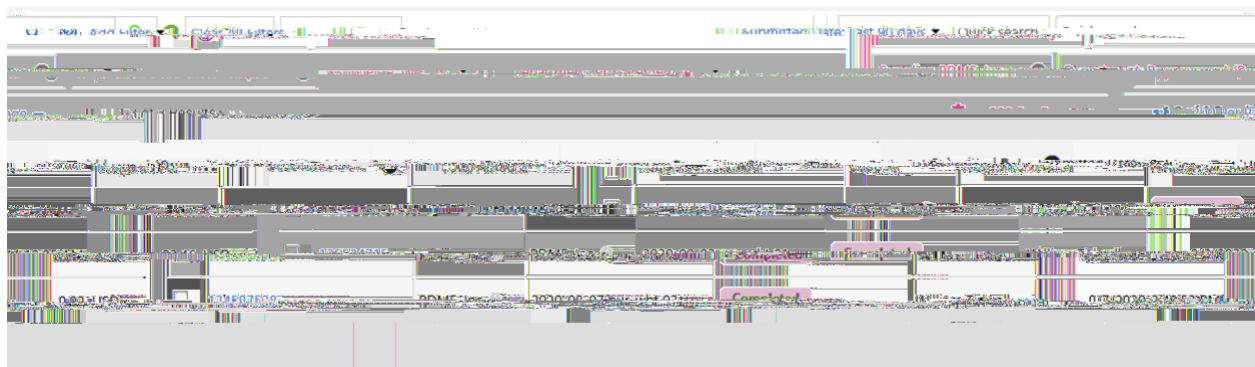
This will now bring up a dropdown box with a search option. If the filter needed is in the listing, then simply click on the checkbox and click the blue Apply button.



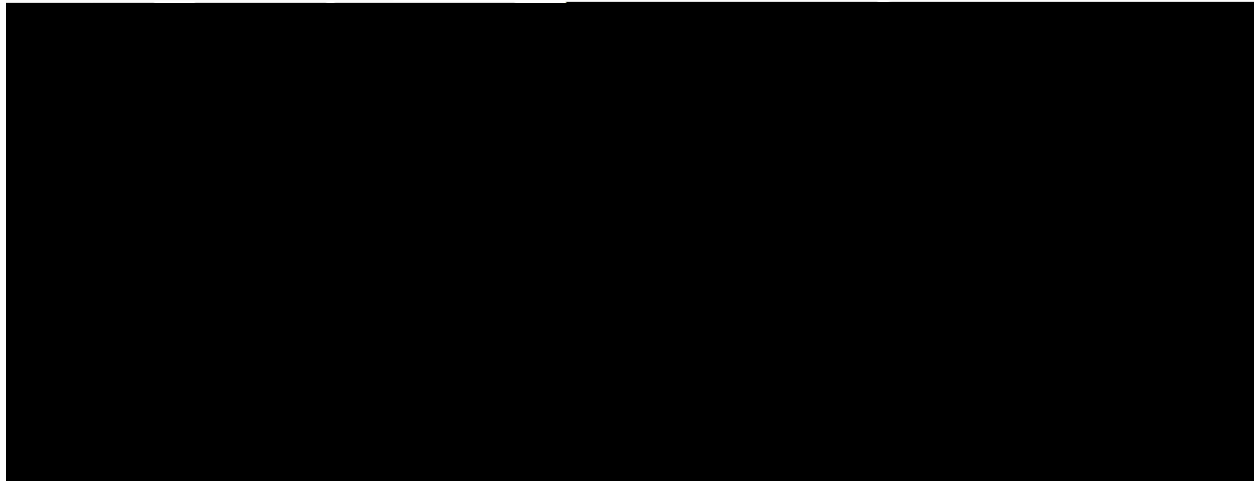
If the filter option is not listed simply start typing in the needed filter that corresponds with the filter option chosen. Once the filter appears click the checkbox and click the blue Apply button.



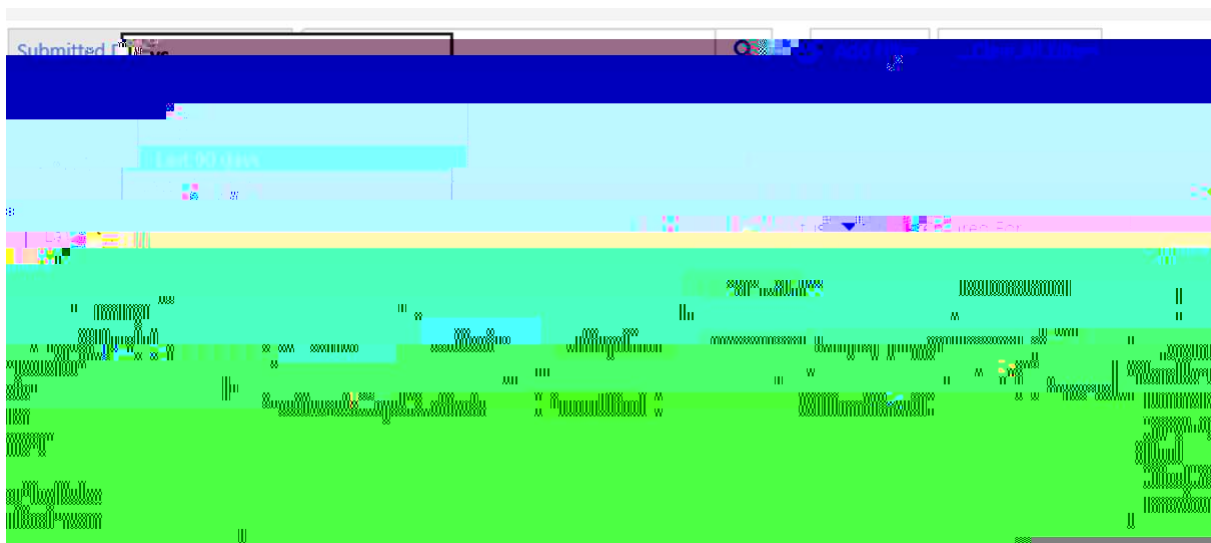
The chosen results using the filter options will now appear.



The dates on the search results can also be changed using the dropdown on the Submitted Date. The options are All, Within certain date parameters, or Between selected chosen dates.



Using the Within dropdown a slew of choices will be shown as options to change the dates.



Once an option on the Submitted Date is chosen to click the blue Apply button.

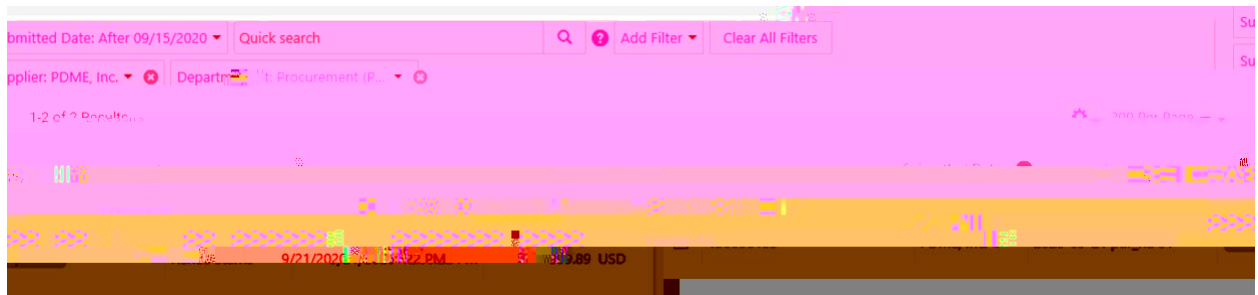
The selected results will then appear.

On the Submitted Date dropdown there is also a more options button. Once clicked it will open a

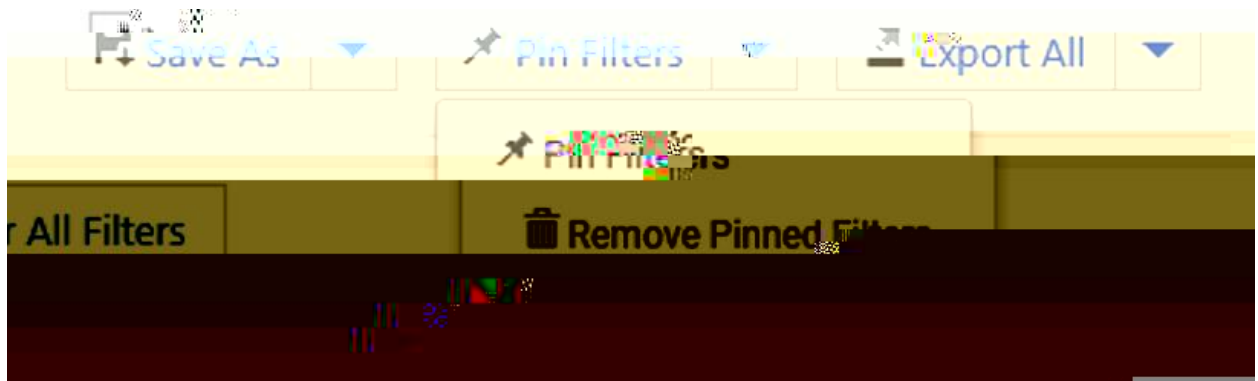




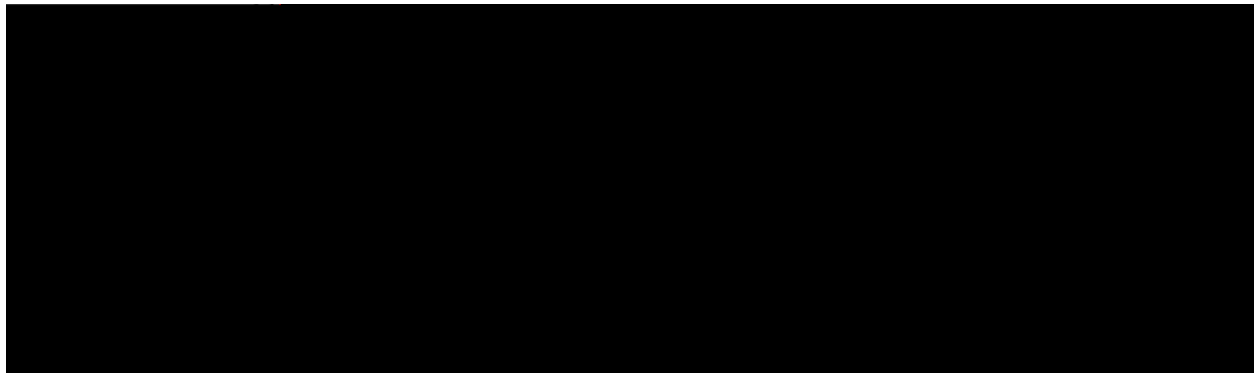
The selected results based on the chosen dates will then appear.



On the upper right side of the search there is a Save As, Pin Filters, and Export All dropdowns. By selecting the Pin Filters option the chosen search filters and parameters that are chosen at that time will be used each time a new search for documents is completed.

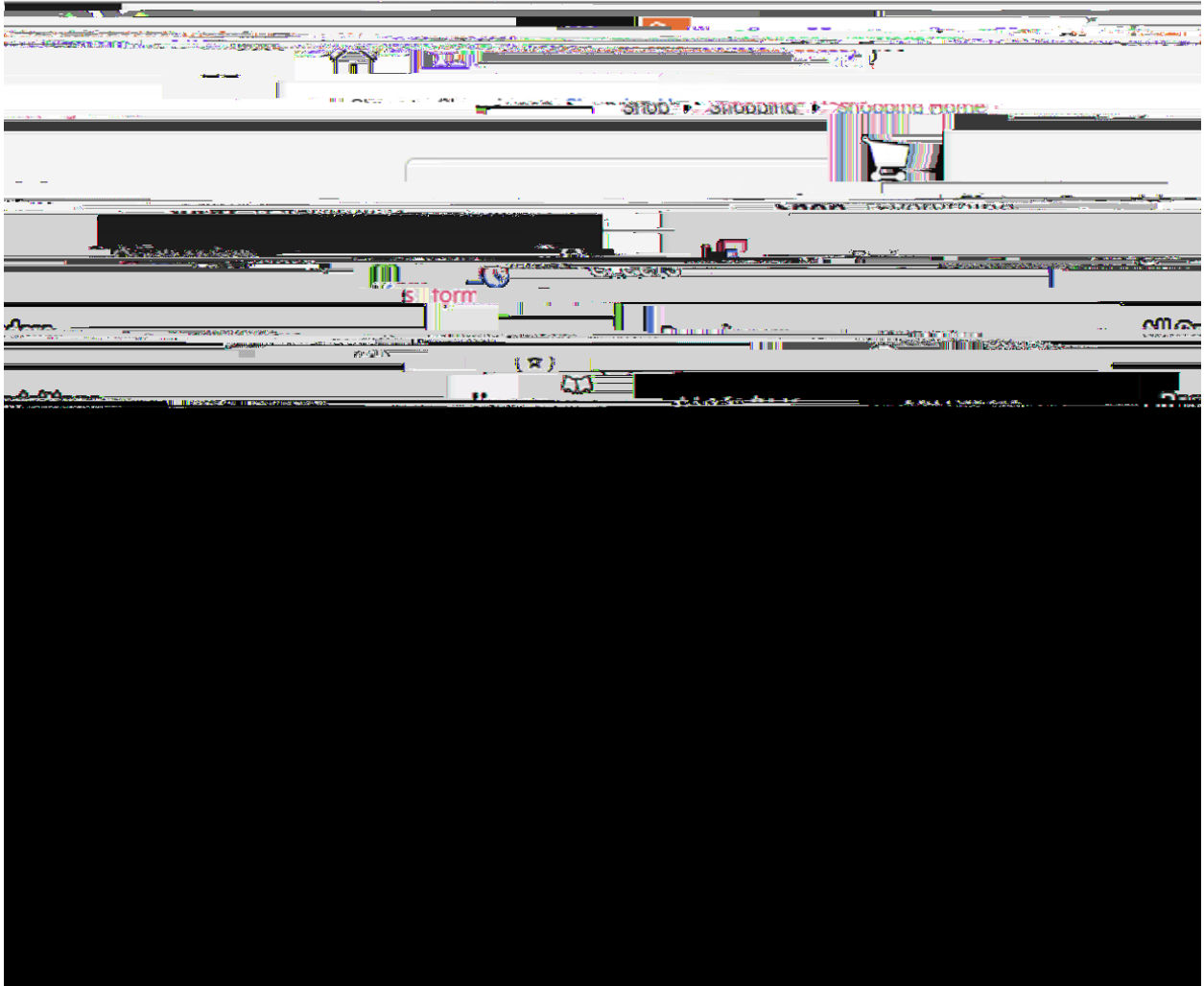


Once choosing the Pin Filters option a box will appear asking to verify that the current search will be pinned. Click on the blue Yes button if this will need to be true.



## To search for Purchase Orders

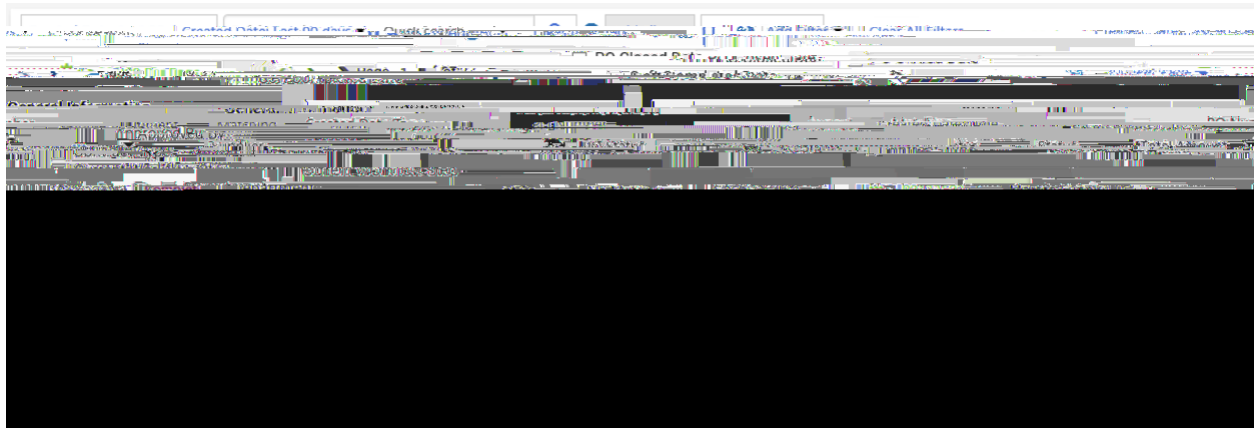
Choose Purchase Orders under the search option.



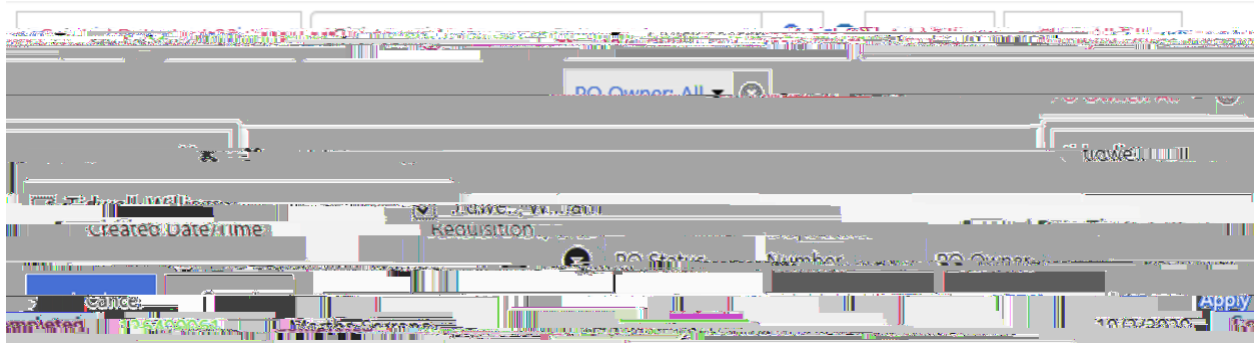
The Purchase Orders search results will appear with the following columns: PO Number, Supplier, Created Date/Time, Requisition Number, PO Owner, Shipment Status, Matching Status, and Total Amount.

L

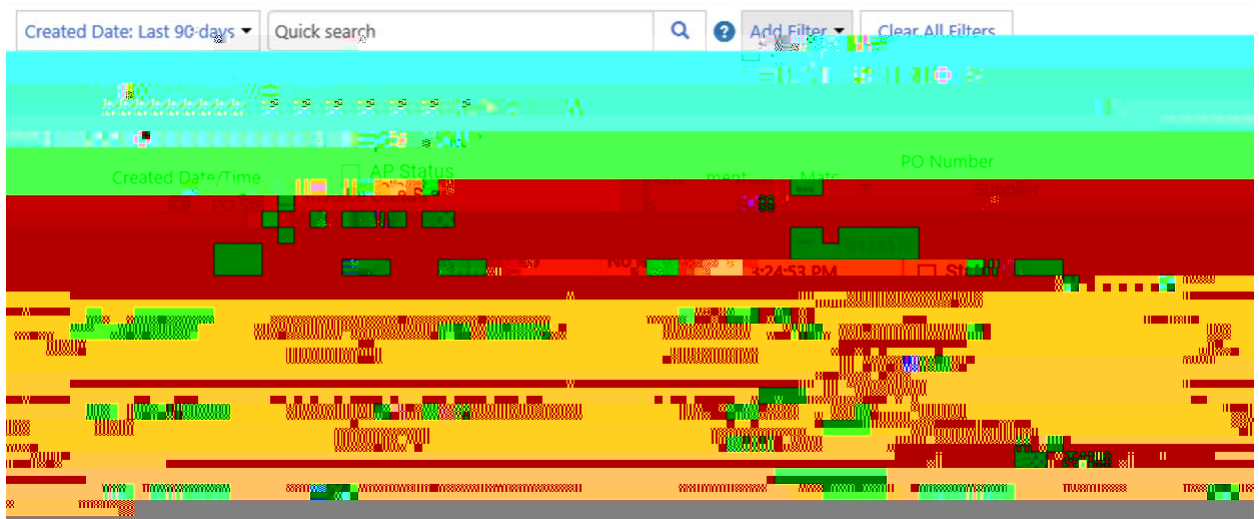
To find an individuals Purchase Orders under the Add Filter selections choose PO Owner. Click the checkbox.



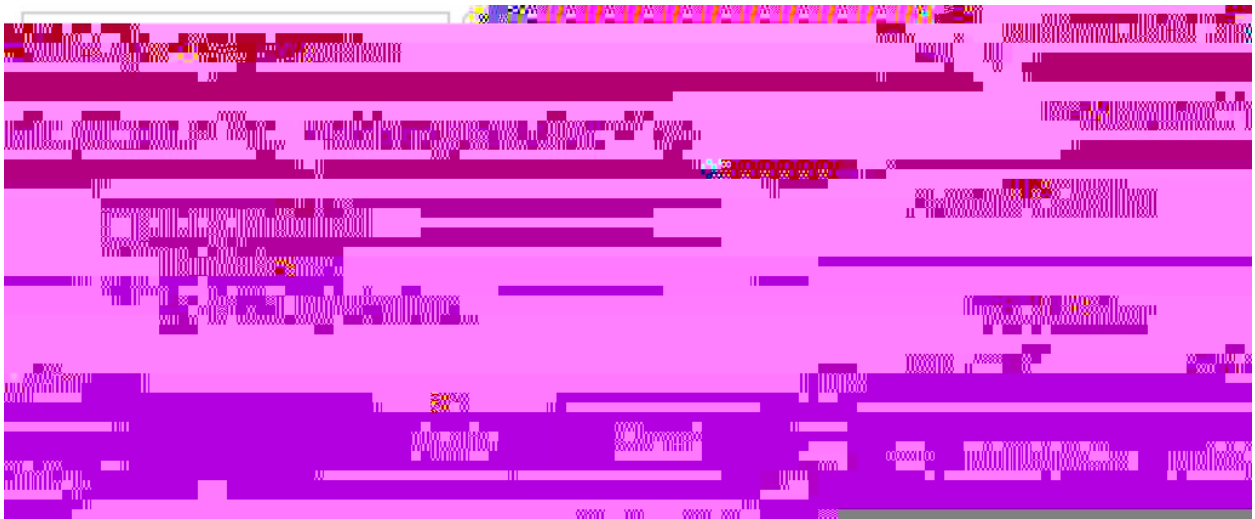
The PO Owner dropdown will appear. Type in the desired search term and click the checkbox when option appears. Click the blue Apply button.



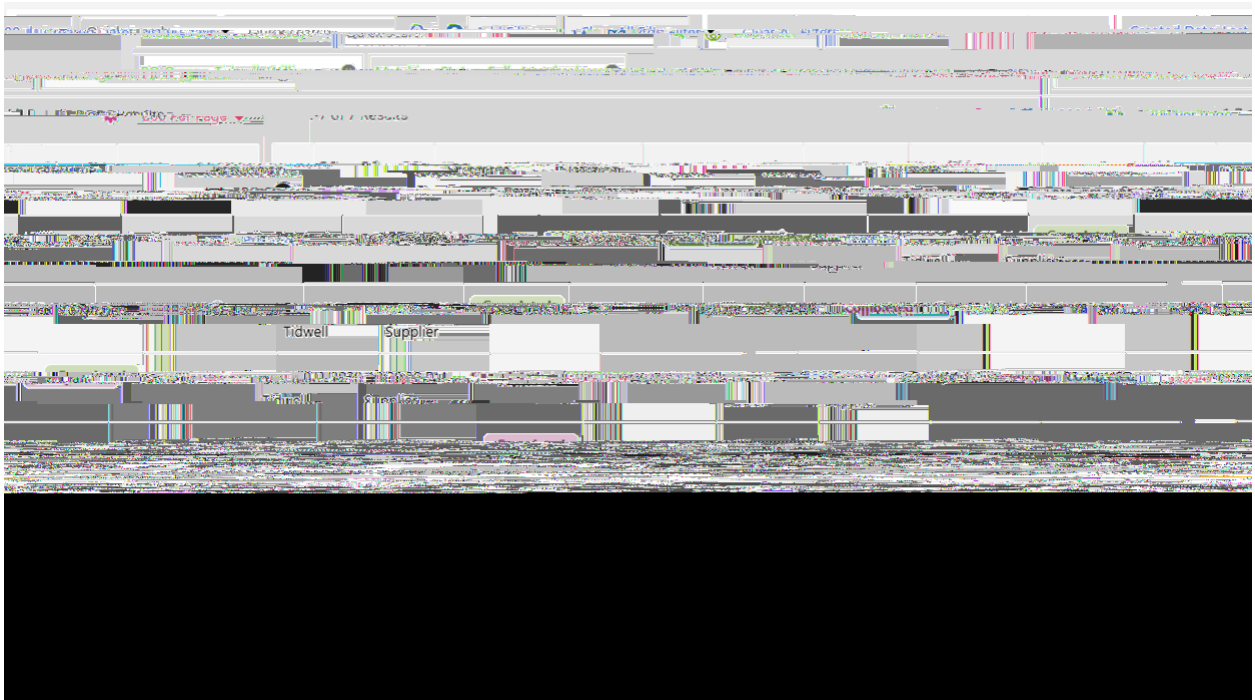
Also, under Add Filter is Matching Status. Click the chosen checkbox.



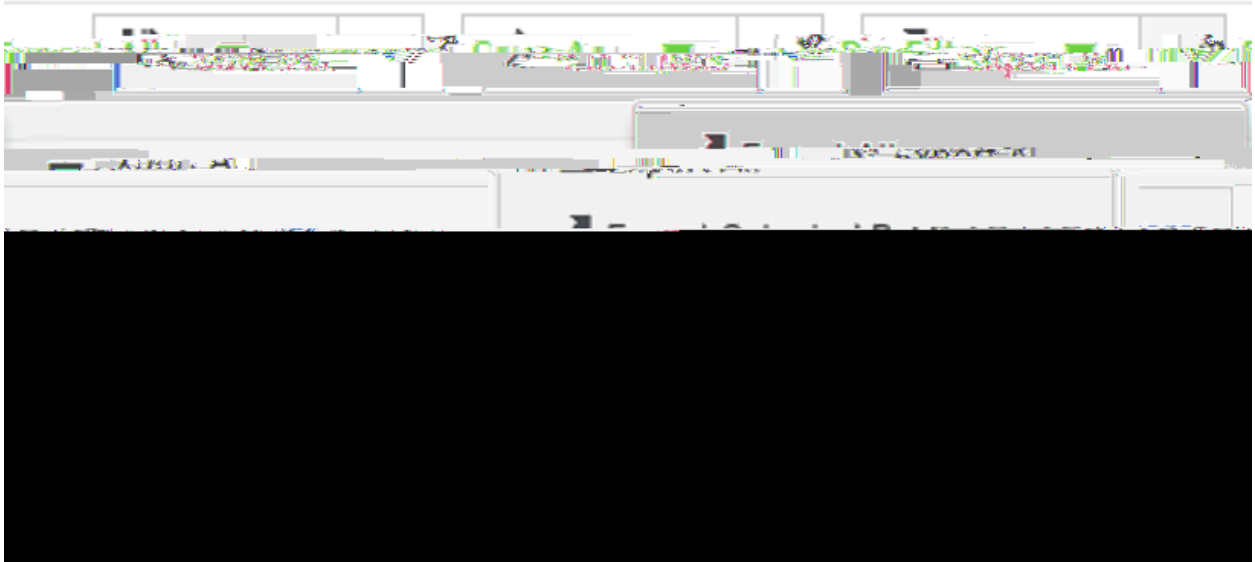
Under Matching Status click the checkbox next to the desired option. Click the blue Apply button.



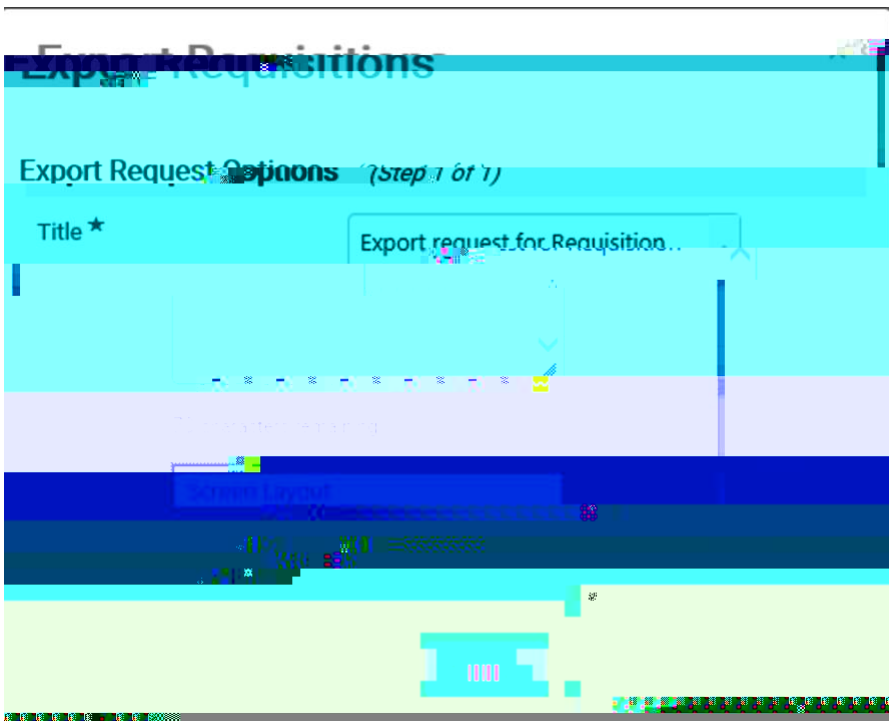
The desired filtered search results will appear.



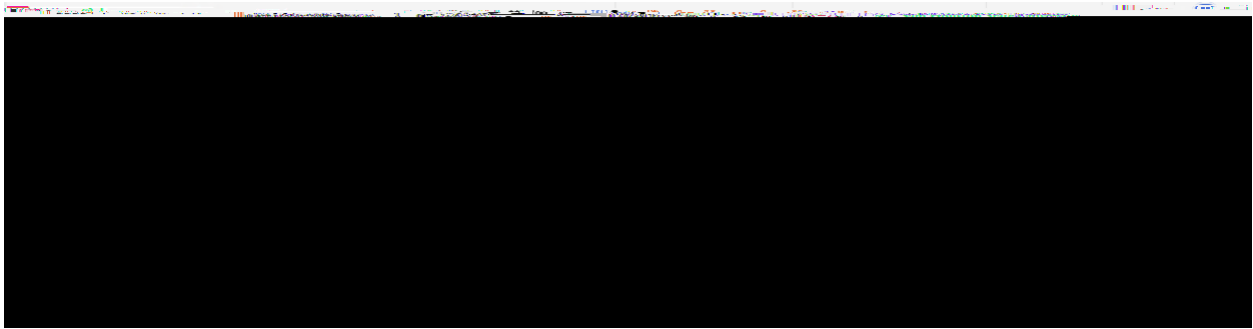
Under the Export All dropdown the options can be chosen to Export All or Export Selected Rows to an Excel spreadsheet.



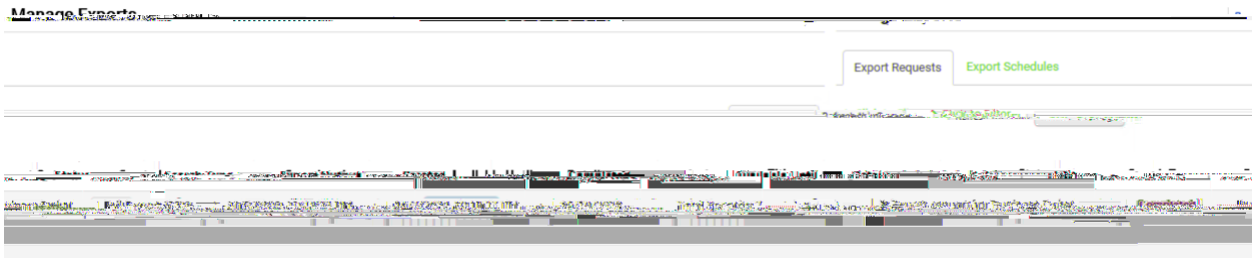
The following pop up box will appear to set the preferred Export settings. To get the most detail under type choose Full Export. Click the blue Submit button.



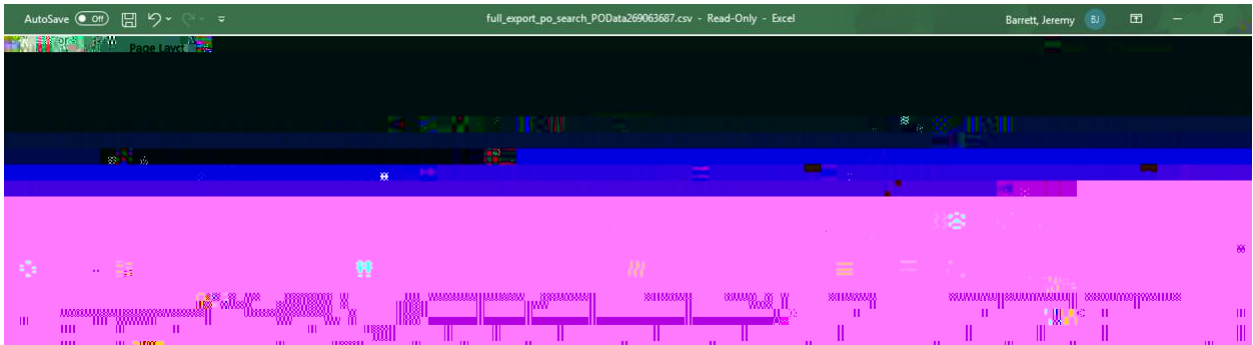
Once selection is made click the blue Manage Search Exports in the green pop up.



On the Manage Exports screen click on the title of the file to open up the excel options.

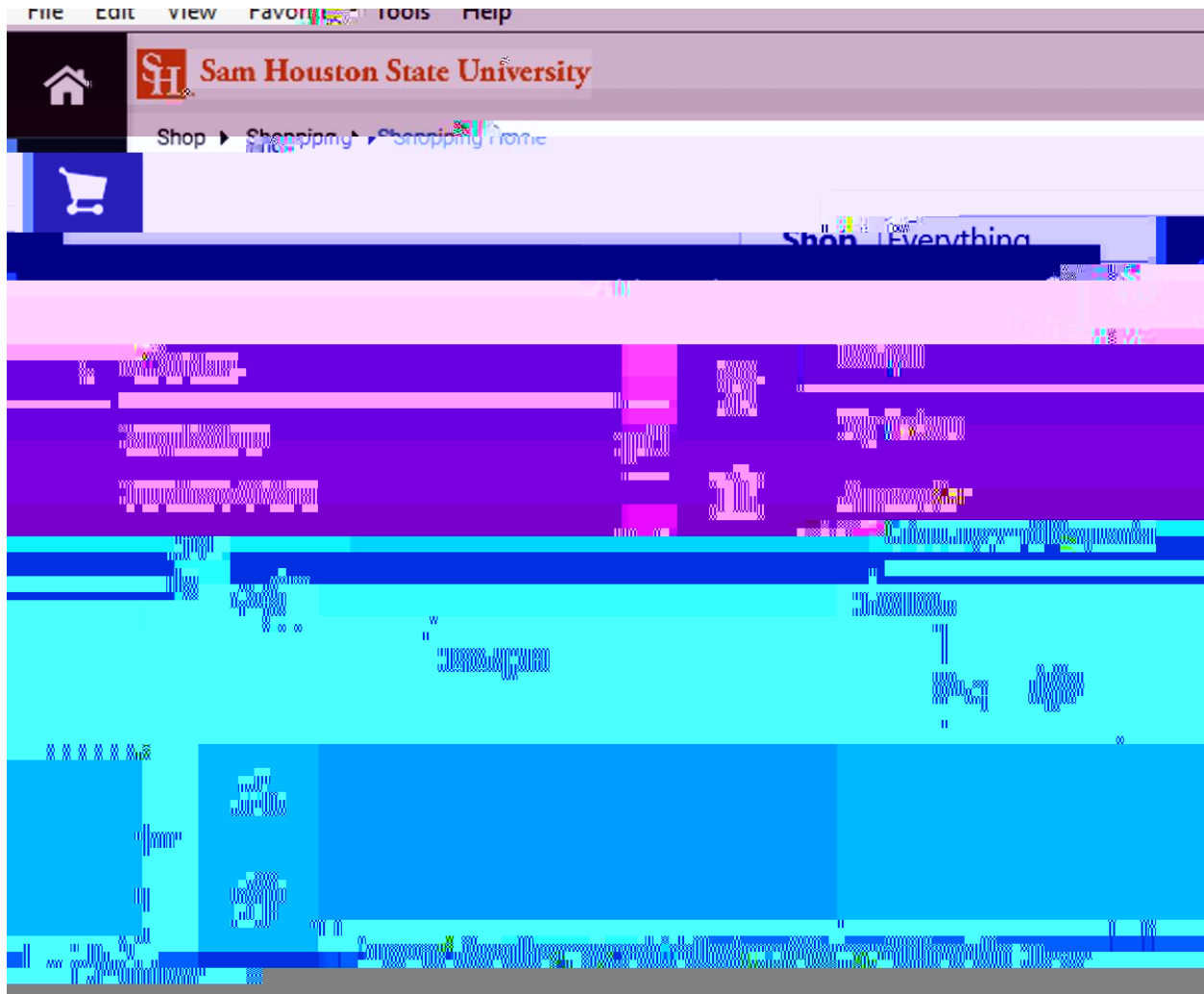


The excel spread sheet will then be able to be chosen that will show all the Purchase Order detail.



## To search for invoices

Click on the Search option on the menu and then click Invoices.

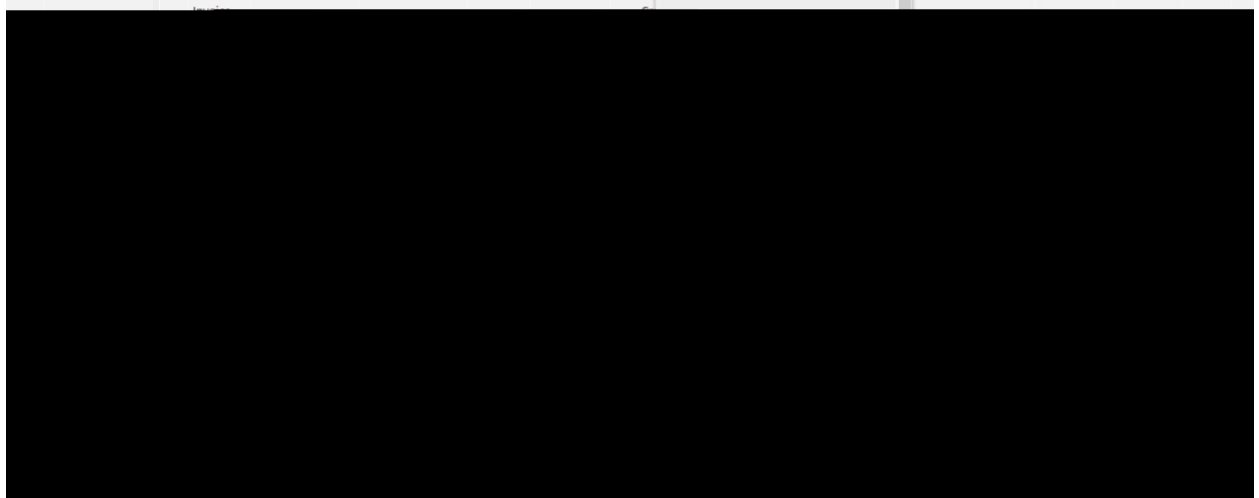




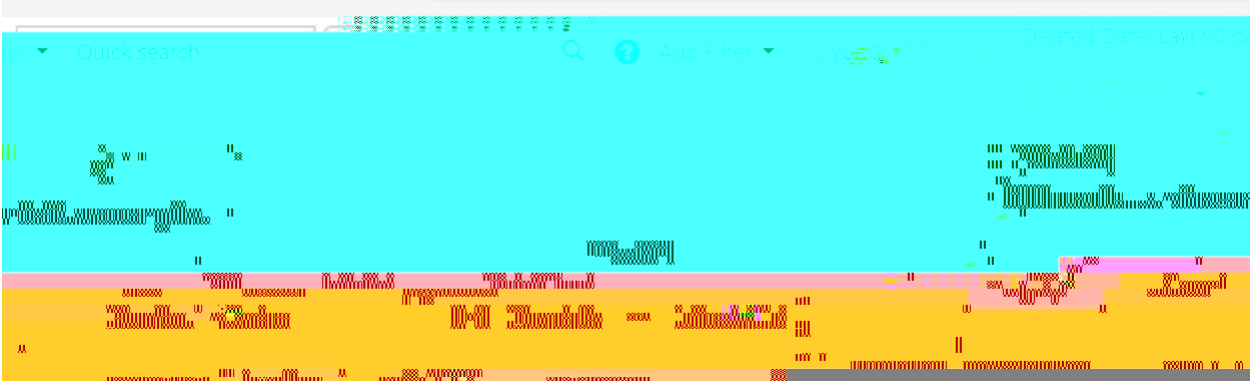
The invoices will appear. The columns are Invoice Number, Supplier Invoice Number(s), Supplier, PO Number, Invoice Status, Created Date/Time, Due Date, Discount Date, Discount Amount, Submitted Date, Invoice Source, Invoice Type, Pay Status, and Total Amount.



To filter invoices, click the Add Filter dropdown and a variety of filter choices will appear. Simply click the checkbox next to the filter choice needed.



Once the chosen Filter box appears type in the selected search parameter and click the blue Apply button.



The chosen search results will then appear.

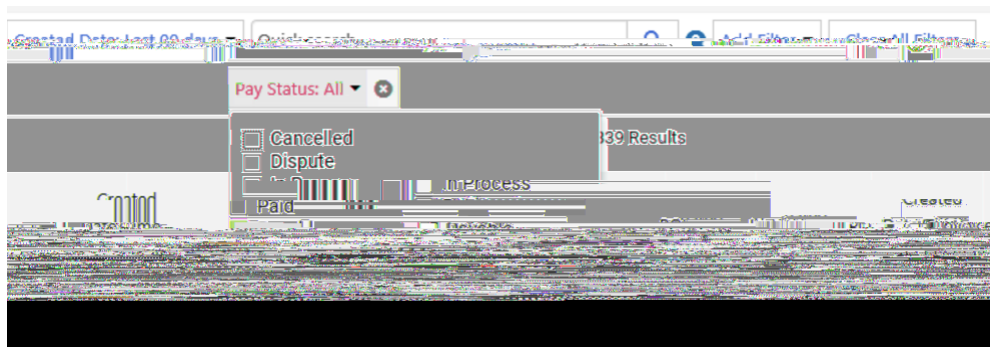


### Pay Status

Another option on Invoices is adding the filter for pay status. Click the Add Filter dropdown and choose Pay Status.



Choose the option under pay status needed and click the blue Apply button to get the desired results.

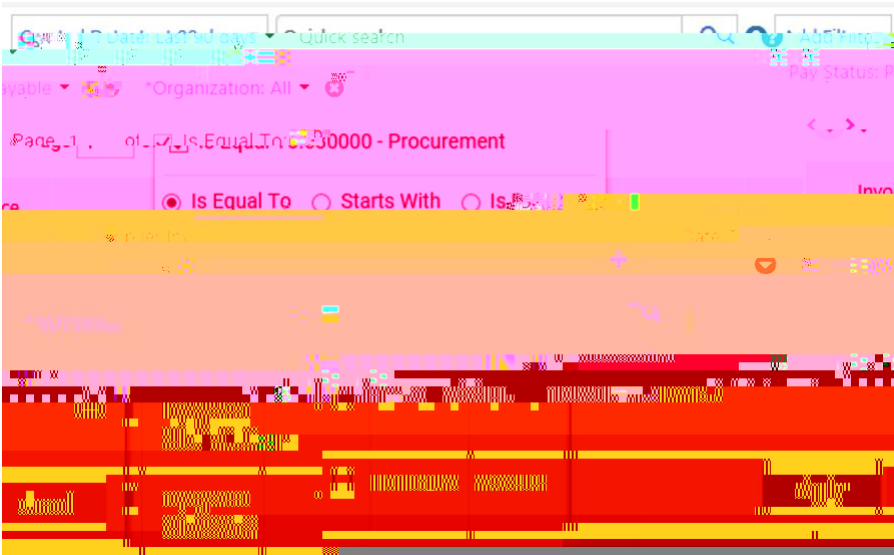


## Organization

Searching for the Organization will need the Org number to be entered in. The default org for your profile will automatically appear at the bottom of the dropdown. Simply enter the org in the search box or choose the org options using the blue + sign.



Once the Org option appears click the checkbox and click the blue Apply button.

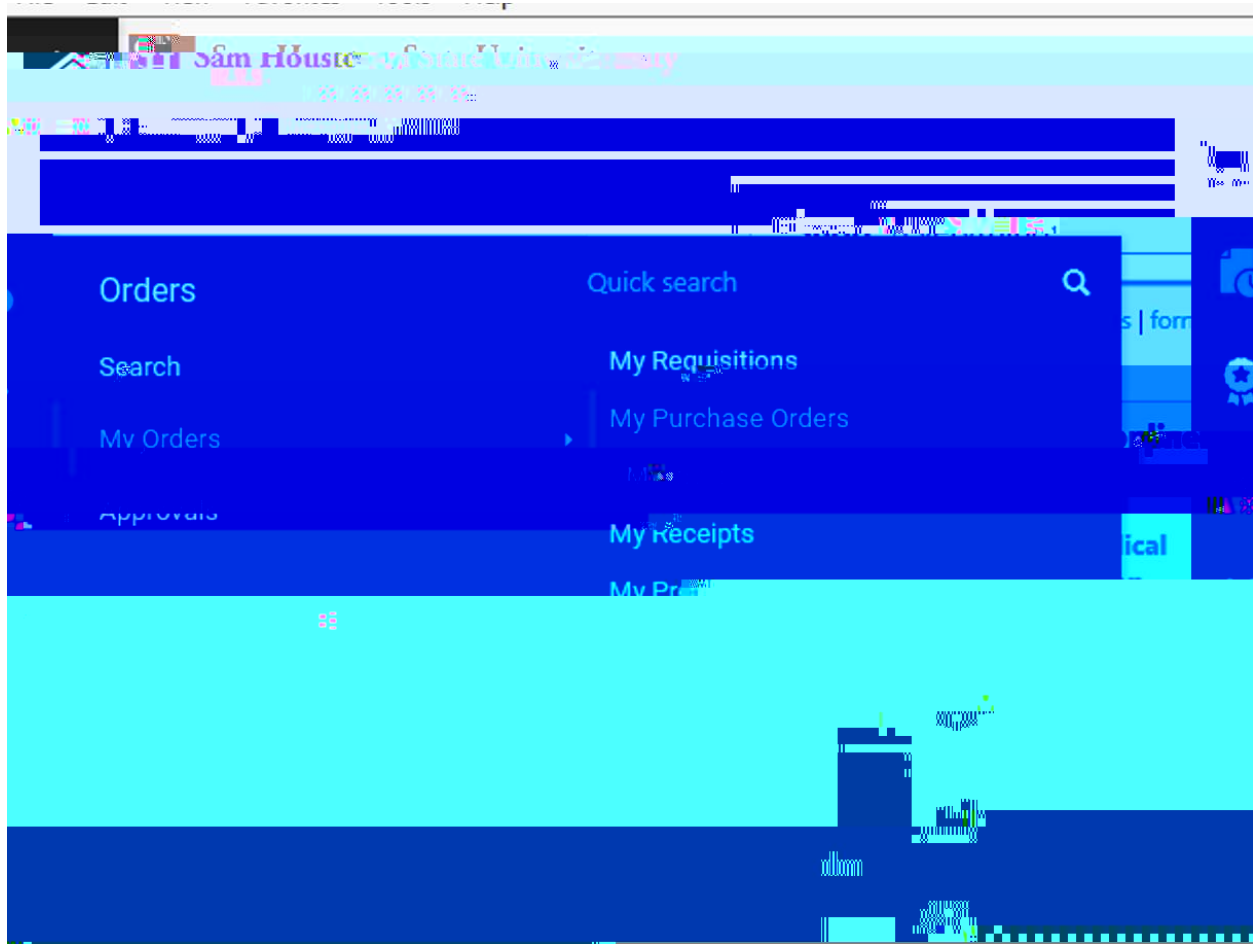


The desired search results will then appear.



## To search for My Orders

To search for My Orders, choose the option needed under My Orders.



Once option is chosen the results will appear. Further Filter search options can then be applied.

