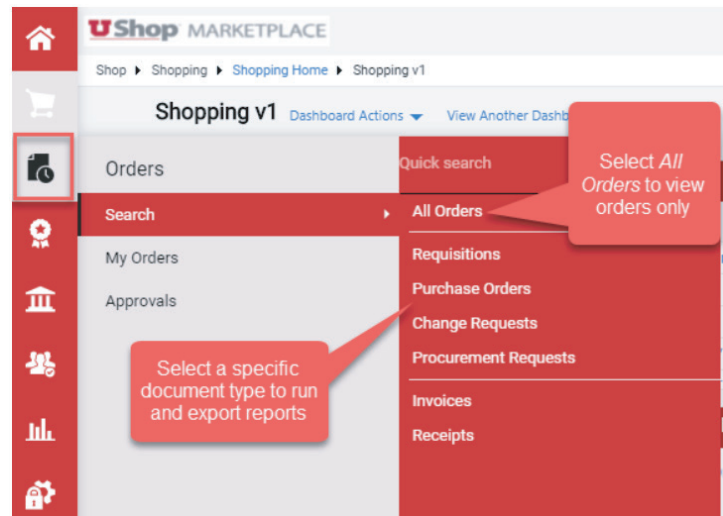


Enhanced Search provides more options to search documents in UShop. Users may choose to:

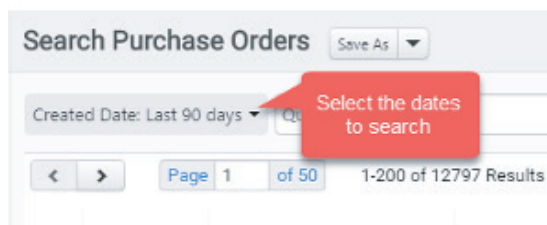
- Utilize *Quick Search*
- Customize searches
- Save searches
- Export search results

1. Select the Document type

- Select *All Orders* to browse all document types.
- To export search results, always first select a specific document type.

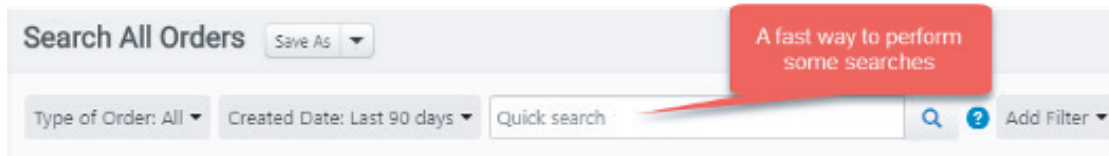


2. Select the dates to search



3. Quick Search

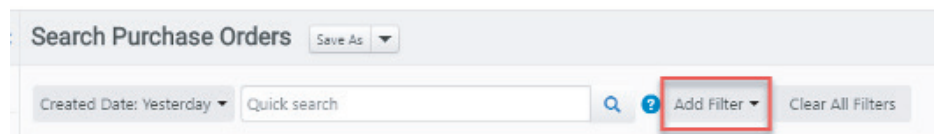
Use this to get a quick view of documents. Many filters are available to refine your search, see *Appendix A – Quick Search Filters* at the end of this guide.



Customize your search. The steps below show how you can set up searches to meet your specific needs and preferences.

4. Add and Pin Filters

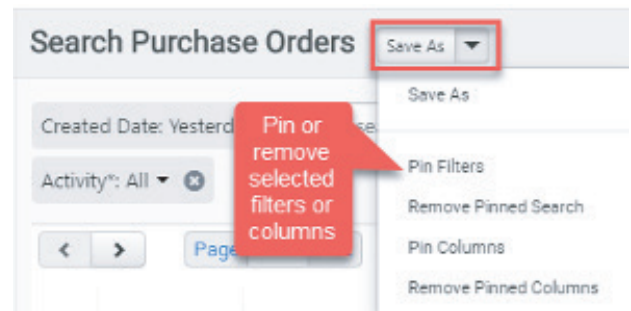
a. Add filters to refine your search further.



b. When you select a filter from the dropdown, it will display under the default fields. Open the dropdown on each filter to select specific values.

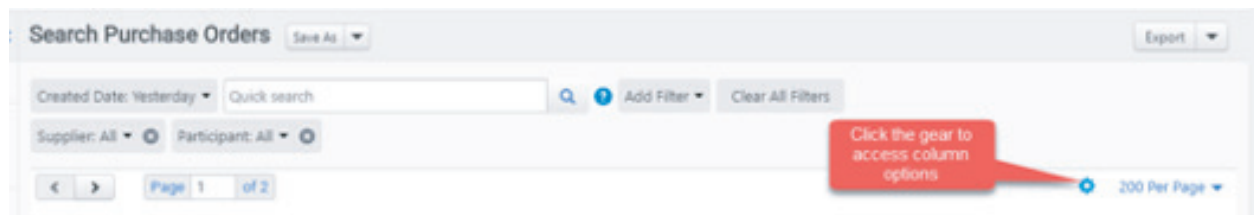


- c. Pin selected filters to save as defaults for future searches.



5. Select and Pin Columns

- a. You can select which columns to include in the display of your search. Click on the gear icon to get started.

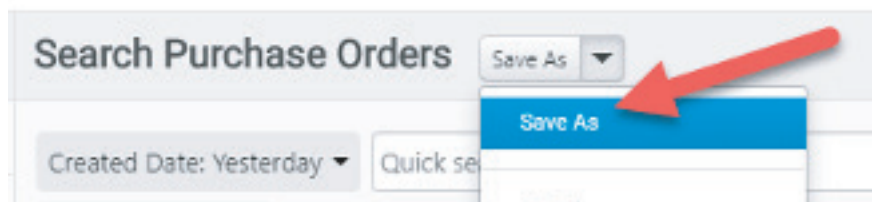


- b. Select and arrange the items to be displayed as columns in your search.

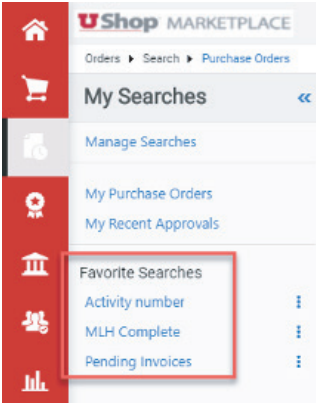


6. Save search

Save a search with a custom name for easy access later.

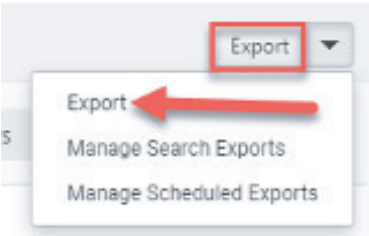


7. Searches you save will appear on the left bar under “Favorite Searches”.

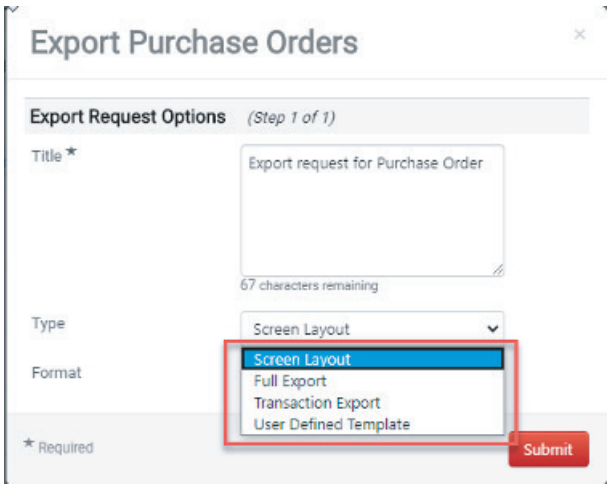


8. Export Searches

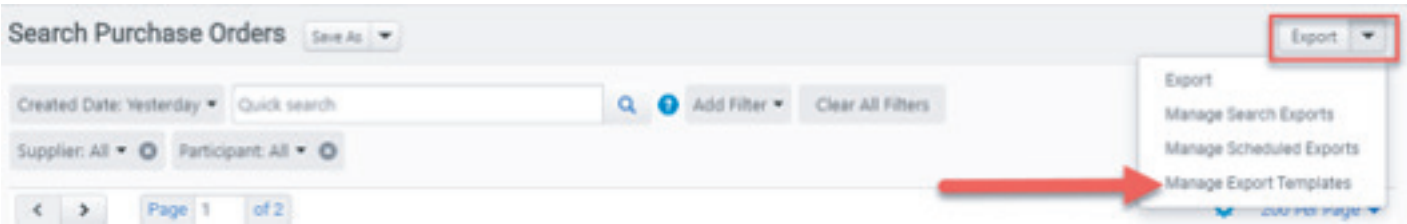
a. You can easily export the data displayed on the screen to an excel spreadsheet.



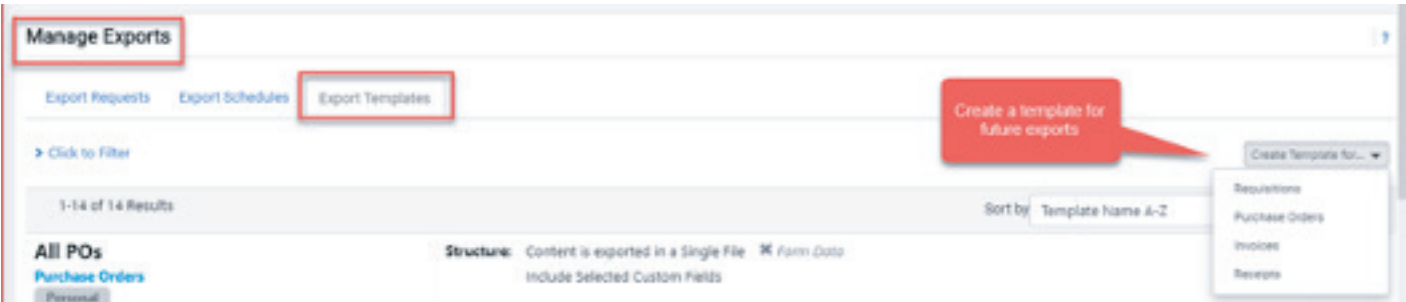
Select from Screen Layout, full Export, Transaction Export, or User Defined Template.



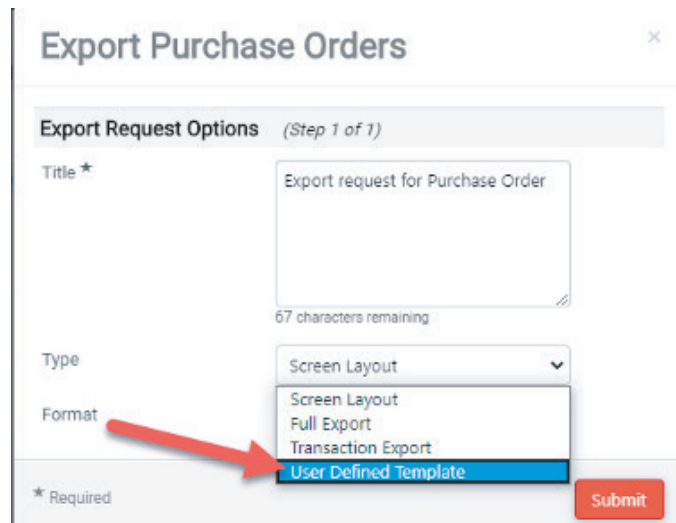
b. To select User Defined Template, you must first create a customized template. To do this, click on the Export dropdown and selecting *Manage Export Templates*



c. Select the Export Templates tab, select the type of document, and create the template



- d. When you export future searches, your customized template will be listed under *User Defined Template*.



The screenshot shows a web interface for 'Export Purchase Orders'. It is titled 'Export Request Options (Step 1 of 1)'. There are three main fields: 'Title' with a text area containing 'Export request for Purchase Order' and a '67 characters remaining' indicator; 'Type' with a dropdown menu set to 'Screen Layout'; and 'Format' with a dropdown menu open showing four options: 'Screen Layout', 'Full Export', 'Transaction Export', and 'User Defined Template'. A red arrow points to the 'User Defined Template' option. A 'Submit' button is at the bottom right. A '*' Required label is at the bottom left.

Appendix A – Quick Search

Quick search provides a faster way to perform some searches. The different options to refine your search are outlined below.

Combine Searches

Use "OR" between each search. For example, 12389 OR 83827

Search for an Exact Match

Put a phrase inside quotes. For example, "Fisher Scientific"

Exclude Words from a search

Put a - in front of a word to exclude it. For example, John -Johnson

Search for wildcards

Put an * in your word as a placeholder. For example, 123*98

Search for place holder

Put one or more ? as a placeholder. For example, 1234??6

Searchable Data: Searchable content is comprised of fields from the order types included

Appendix B – Additional Training

[10-Step Guided Tour](#)

[Training Video](#)