

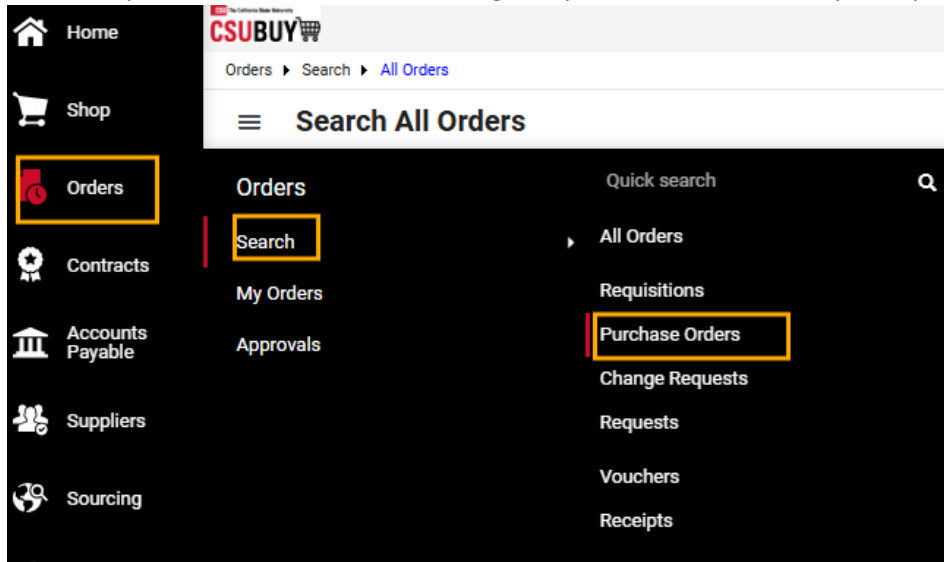
How to Create and Export Searches (Reports)

Setting up a custom search allows P2P users to save and download searches (reports) quickly and easily.

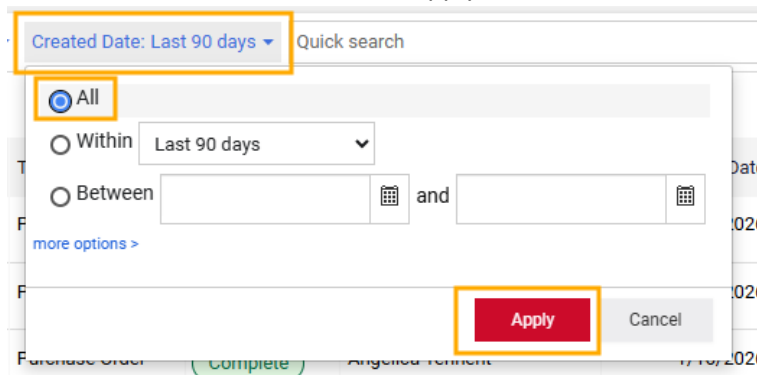
All P2P users (requesters, approvers, etc.) have access to create searches and export searches.

Follow these steps to create a search.

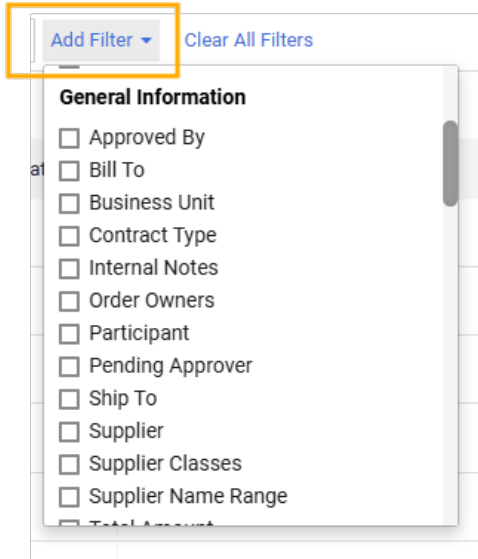
1. From the P2P home page, navigate to the flyout menu and select Orders, then select the type of order: Requisition, Purchase Order, Change Request or Voucher. Receipt, Requisition, or Voucher,



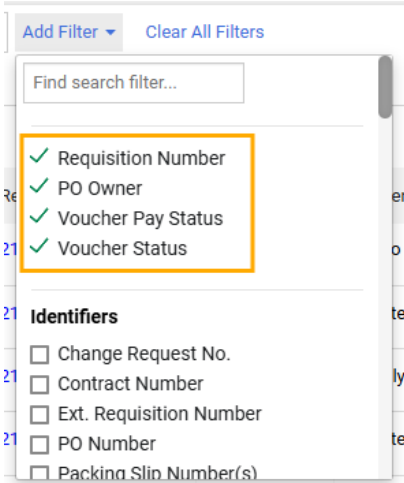
2. Open the Created Date drop-down menu and specify the date of your search from these options: All, Within, and Between, then select Apply.



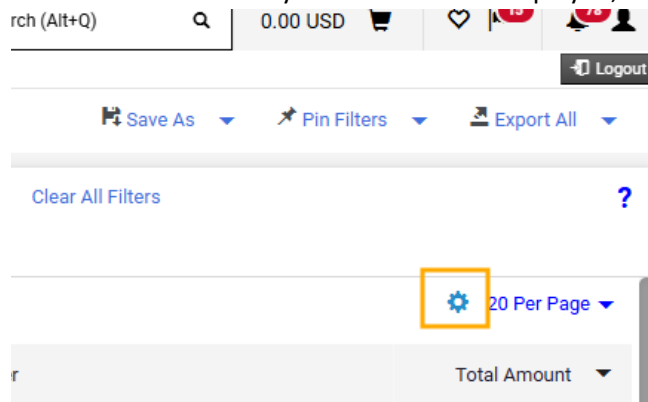
3. Use the Add Filter drop-down menu add filters to narrow your search. You can use the search bar to type in a specific filter or scroll through the list.



4. Continue with step 4 to add additional filters. You will notice that as you add a filter, it will now show in the Add Filter menu. If you want to remove the filter, click the check mark.



5. To customize the way the columns are displayed, click the gear icon.



6. The identifiers on the left are what will be shown on your search (report) in the order that they appear. To move, click the up or down arrow next to the identifier. To remove, click the trash can next to the identifier. To add additional identifiers, select from the column on the right and place a check mark in the box(es). When your columns are configured, click Apply.

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... Pin Columns as my defaults

- Account *
- Account Override *
- Accounting Date
- Amount-Only / Blanket PO *
- AP Status
- Approval Actions
- Approval Steps
- Asset *
- Asset Profile ID *
- Bill To
- Business Unit
- Business Unit *
- Buyer *
- Cancellation Date *
- Change Request No.
- Class *
- Commodity CF *

- PO Number
- Supplier
- Created Date/Time
- PO Status
- Requisition Number
- Shipment Status
- Matching Status
- Total Amount
- Prepared By
- Voucher Pay Status
- Voucher Status
- Voucher Total
- Voucher Payment Amount *

Apply Cancel

7. Now your search results will show in your customized order

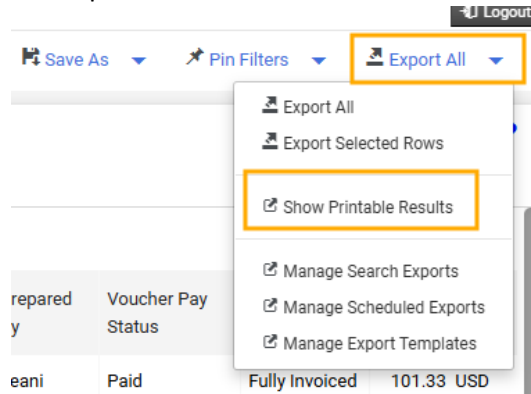
Created Date: All ▾ Quick search 🔍 Add Filter ▾ Clear All Filters ?

Prepared By: Cressy, Jeani ▾ × Requisition Number: All ▾ × Voucher Total: All ▾ × Voucher Pay Status: All ▾ × Voucher Status: All ▾ ×

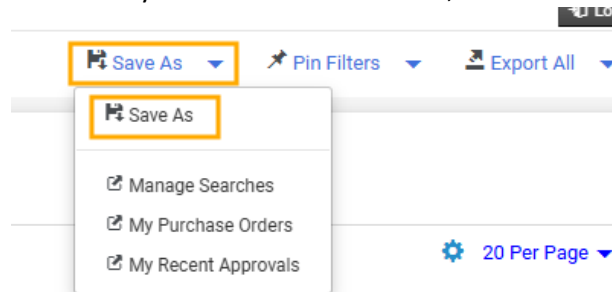
Page 2 of 4 21-40 of 76 Results 20 Per Page ▾

PO Number	Supplier	Created Date/Time	PO Status	Requisition Number	Shipment Status	Matching Status	Total Amount	Prepared By	Voucher Pay Status	Voucher Status	Voucher Total
2400066916	Amazon.com	12/3/2025 10:05:24 AM	Completed	209504603	Fully Shipped	Fully Matched	101.33 USD	Jeani Cressy	Paid	Fully Invoiced	101.33 USD
2400064843	Fisher Scientific Company LLC	11/13/2025 2:45:21 PM	Completed	209054877	Accepted	Fully Matched	475.69 USD	Jeani Cressy	Paid	Fully Invoiced	475.70 USD
2400064733	Fisher Scientific Company LLC	11/13/2025 8:40:12 AM	Completed	209019662	Partially Shipped	Fully Matched	1,510.29 USD	Jeani Cressy	Paid	Fully Invoiced	1,510.31 USD
2400064161	Fisher Scientific Company LLC	11/7/2025 9:31:20 AM	Completed	208791523	Fully Shipped	Fully Matched	520.78 USD	Jeani Cressy	Paid	Fully Invoiced	520.78 USD

8. From here, you can either print this search (report) or save for future use. To print, click on the Export All drop-down menu and select Show Printable Results.

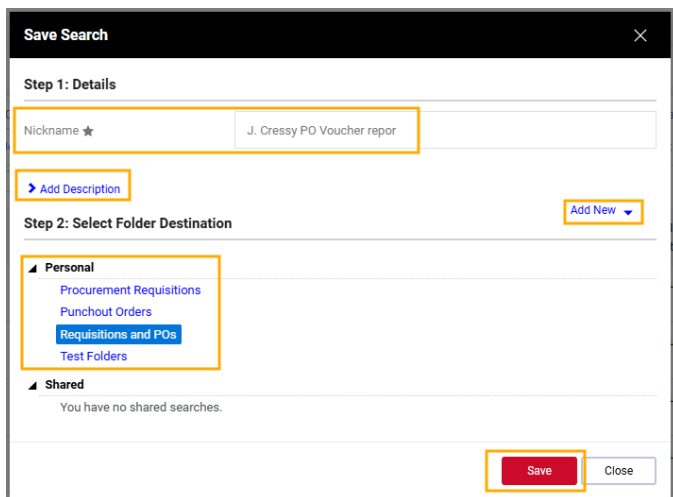


9. To save your search for future use, click on the Save As drop-down menu and select Save As.



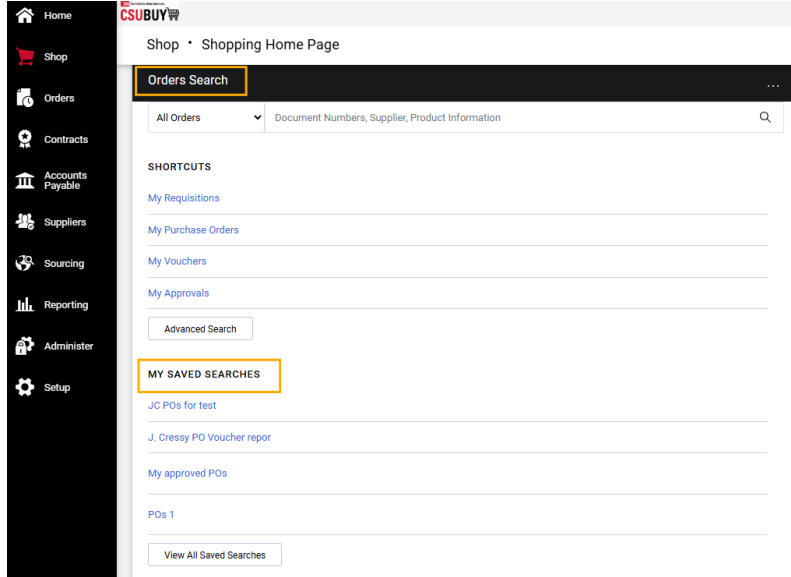
10. Complete the Save Search details

- Enter a search (report) name in the Nickname field.
- Click Add Description for more detail (optional)
- Select a Folder Destination by clicking into one of your saved Personal folders or by clicking the Add New drop-down to add another. Note: always save to a personal folder, not a Shared folder.
- Click Save

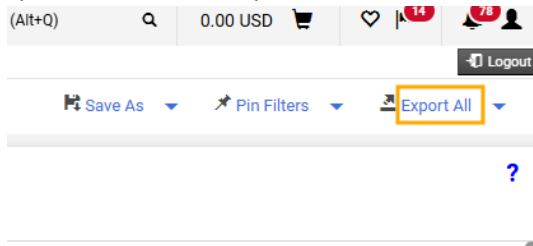


Follow these steps to access your saved searches and export a search (report) or print. Note: when you save a search, the information in the search results will be up to date each time you access them.

11. From the P2P home page, you'll find your saved searches under Orders Search. Click on the search that you want to view.

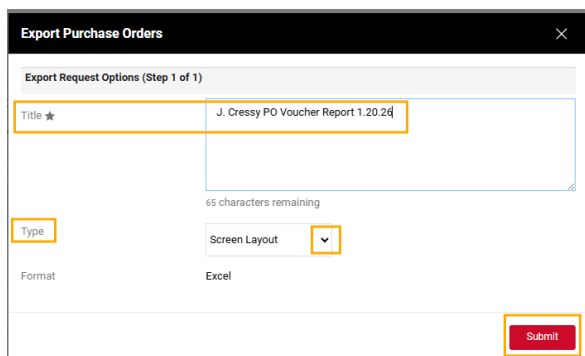


12. To print the results, follow the instructions in step 8. To save the search results in an excel spreadsheet, click Export All.



13. Complete the Export Purchase Orders details

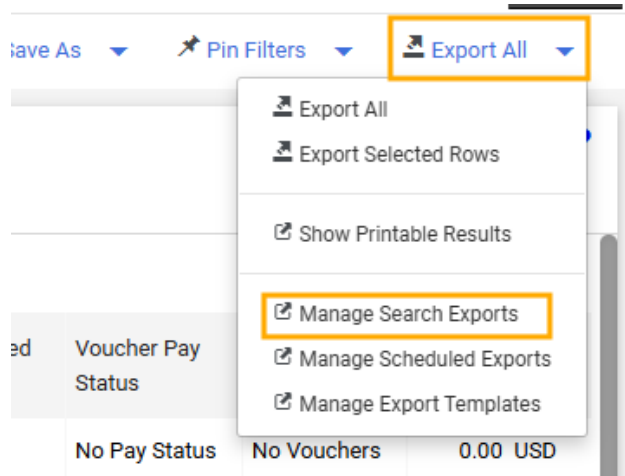
- Enter a title in the Title field. Note: if you plan to export this search (report) at different times it is suggested that you add a date.
- Select a Type from the drop-down
- Click Submit



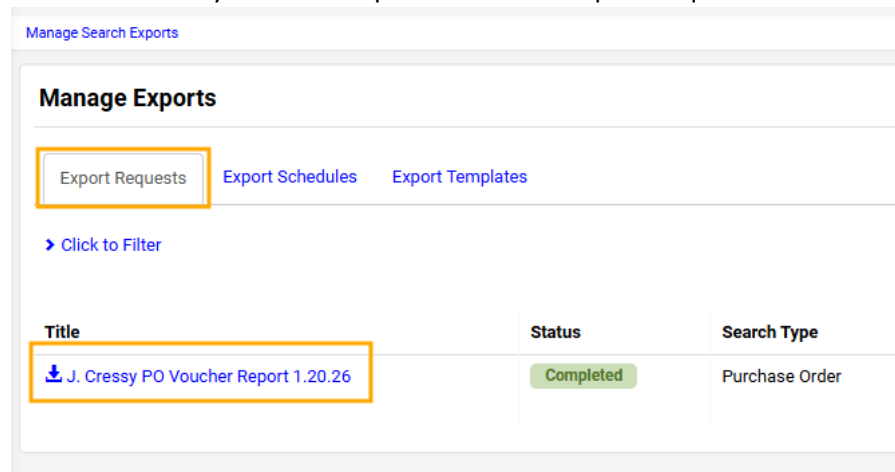
14. When you see the Success message, or export has saved.



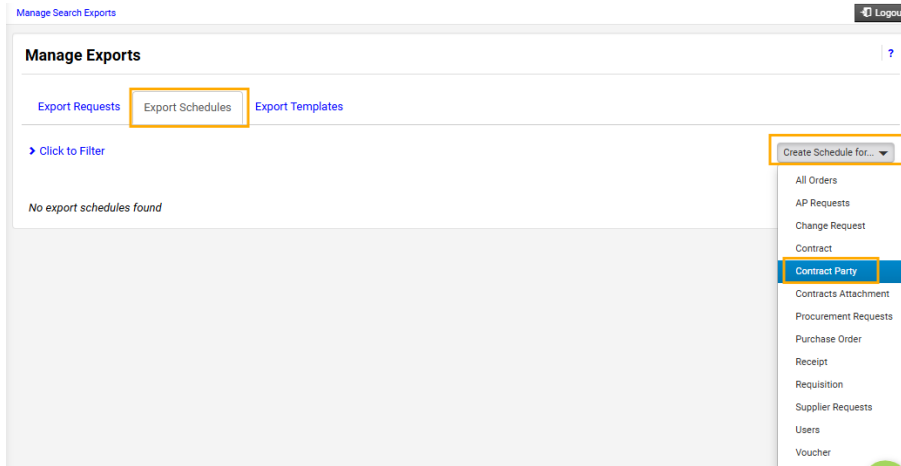
15. To view all exports at a future date, go back to your saved search by following the instructions in step 11. Click on the Export All drop-down menu and select Manage Search Exports.



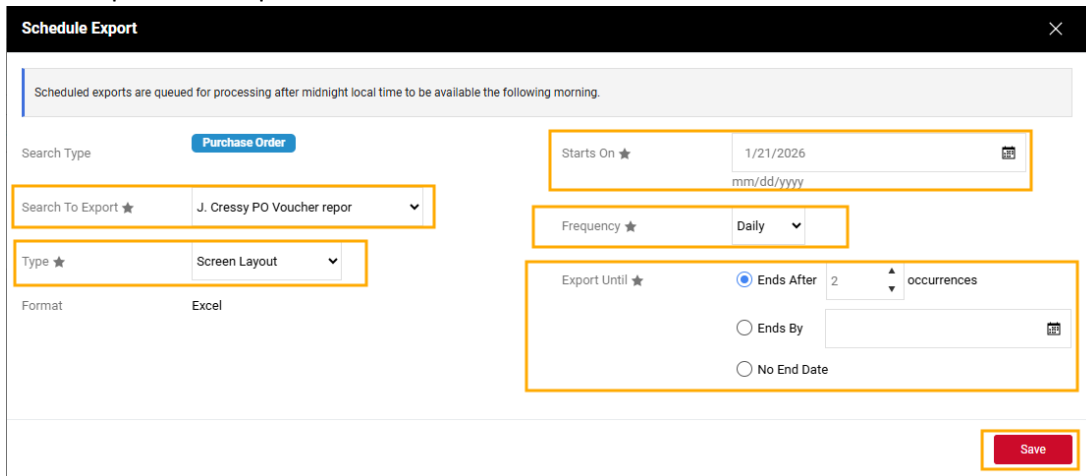
16. You will find your saved exports under the Export Requests tab.



17. If this is an export that you want run daily/weekly/monthly, you can set up a scheduled export to happen automatically. To do this, click on the Export Schedules tab then click on the Create Schedule for... drop down menu and select your report type (for this guide we created our search under Purchase Order).



18. Complete the required fields and click Save.



19. Your scheduled export will now show under the Export Schedules tab. If at any time you want to change or delete the scheduled export, you can do so by clicking on the Edit drop down under Actions.

