

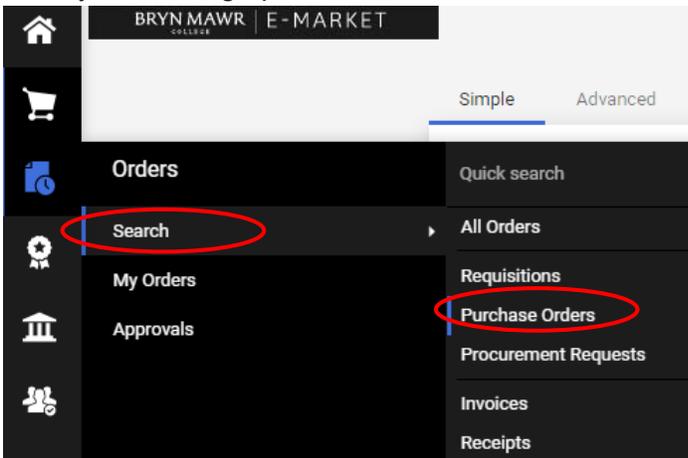
Run Reports

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Advanced Search

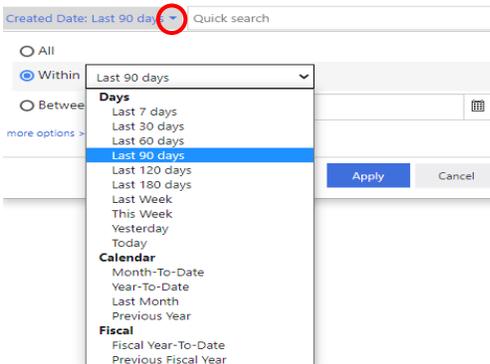
1. From the  menu icon, hover over *Search* then click on the type of document you are searching for; i.e. *Purchase Orders, Invoices or Receipts*. It is not recommended you choose *All Orders*. *All Orders* limits your filtering options.



Please Note: if you choose *All Orders*, your results will include Requisitions, POs, receipts and invoices which limits your filtering options.

2. You have the option to filter your search options by create date. To view all documents, click circle to left of *All*. To expand or decrease that option click on the  within the *Created Date bar*

Created Date: Last 90 days . Then select from the options and click **Apply** .



Run Reports

- The results will appear, to open a document click on the number in blue.

Created Date: Previous Fiscal ... Quick search Add Filter Clear All Filters ?

Invoiced By: Macintosh, Don... *

1-1 of 1 Results 40 Per Page

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	Total Amount
1612302	TEST1234	Granger	PO0001152	Complete	1/29/2020 11:46:39 AM	12/29/2020		0.00 USD	1/29/2020 11:47:06 AM	Manual	PO Invoice	Payable	0.00 USD

Add/Remove Filters

- To reduce number of results, use *Quick search* box at the top and/or *Quick Filters* on left.
- Enter a filter in the *Quick search* box and hit enter i.e. vendor name.

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter

1-4 of 4 Results

Supplier

- Add one or more filters from the *Quick Filters* section.

Quick Filters My Searches

Created Date: Last 90 days Quick search Add Filter Clear All Filters

1-4 of 4 Results

Invoice Number	Supplier Invoice Number(s)	Supplier	PO Number	Invoice Status	Created Date/Time	Due Date	Discount Date	Discount Amount
1774676	345	MAIN STREET FINE CATERING	-	Pending	10/21/2020 2:58:03 PM	11/19/2020		0.00 USD
1774674	22222	OCEAN SUN	-	Pending	10/21/2020 2:56:16 PM	11/20/2020		0.00 USD

Supplier

- AQUA PENNSYLVANIA (1)
- LEARYS FLORIST (1)
- MAIN STREET FINE CATERING (1)
- OCEAN SUN (1)

Invoice Status

- Filters available vary based on document type. See Examples below.

Invoice filters

Quick Filters My Searches

Supplier

- Lowe's Home Centers LLC (26)
- MAIN LINE SPRING WATER (3)
- MAIN LINE MARTIN LUTHER KING ASSOC (2)
- Granger (1)
- PECO ENERGY (1)

Invoice Status

- Complete (21)
- Pending (10)
- Rejected (3)

Invoice Type

- PO Invoice (19)
- Non-PO Invoice (9)
- PO Credit Memo (6)

Invoice Source

- Supplier Portal (18)
- Manual (8)
- Electronic (8)

PO filters

Quick Filters My Searches

Supplier

- Lowe's Home Centers LLC (13)
- WB Mason (2)
- Granger (1)
- Amazon.com LLC (1)
- Office Depot (1)

PO Status

- Completed (18)

Business Unit

- Bryn Mawr College (Bryn Mawr) (18)

Department

- BMC Controller (BMC Controller) (15)
- BMC Controller's Office (BMC Controller's Office) (3)

PO Owner

- Macintosh, Donna (15)
- Macintosh Req/Inv LOCAL, Donna (3)

Prepared By

- Macintosh, Donna (15)
- Macintosh Req/Inv LOCAL, Donna (3)

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- To add one item in a filter click on the item within the filter.

Invoice Type ▼

- PO Invoice 19
- Non-PO Invoice 9
- PO Credit Memo 6

[Show More](#)

- To add >1 one item in a filter click on the [Show More](#). An option box will open, check each box then click [Apply](#). Repeat to add a second filter and so on.

Invoice Type Quick Filter ✕

[Select All](#)

- Non-PO Invoice (9)
- PO Credit Memo (6)
- PO Invoice (19)

[Apply](#) [Cancel](#)

- Filters options will display at the top of your results. To remove a filter, click the ✕. To clear all the filters, click [Clear All Filters](#).

Created Date: Previous Fiscal ... ▼ Quick search

Invoice Type: PO Invoice, PO ... ✕ Mismatch Reasons: No Receipt ✕

1-1 of 1 Results

[Add Filter](#) [Clear All Filters](#)

Export Results

- To export to Excel from your search results, click [Export All](#).

[Save As](#) ▼ [Pin Filters](#) ▼ [Export All](#)

ie of Order: Purchase Order ▼ Created Date: Previous Fiscal ... ▼ Quick search

1-18 of 18 Results 40 Per Page

- The *Export...* window will appear. Enter a *Title** for your export, select the *Type* of export, click [Submit](#).

Export Purchase Orders ✕

Export Request Options (Step 1 of 1)

Title *
 89 characters remaining

Type ▼

Format

[Submit](#)

Run Reports

- You will receive a message box indicating your export request was successful. Click *Manage Search Exports* within the box.



- You will be on the *Manage Exports* page. To open the file, click on file name in blue.

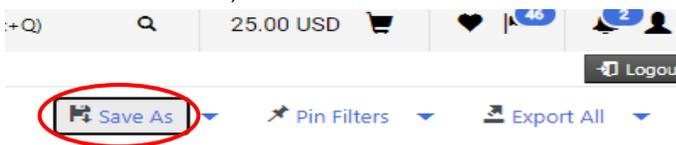
Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Test export request for Invoice	Completed	Invoice	Screen Layout (Excel)	10/20/2020 10:28:19 AM	10/20/2020 10:28:25 AM	10/27/2020	Total Records: 4	Delete
Export request for All Orders	Completed	All Orders	Screen Layout (Excel)	10/19/2020 3:28:44 PM	10/19/2020 3:28:46 PM	10/26/2020	Total Records: 18	Delete

- Click archive_transaction....zip that will appear at the bottom of your screen, double click on file listed in zipped folder. Your Excel file will open.

Save Results

- Save search results with the desired filters so you can run the saved search whenever you want.

- To save a search, click on Save As button under the search and cart icons.



- The *Save Search* box will open. Enter a name for your search in the *Nickname** field. Then click on the Folder where you want to save the search and click **Save**.

Save Search [X]

Step 1: Details

Nickname *

[Add Description](#)

Step 2: Select Folder Destination

[Add New](#)

- Personal
 - Personal
 - D Mac Saved Searches
 - Dept
- Shared
 - You have no shared searches.

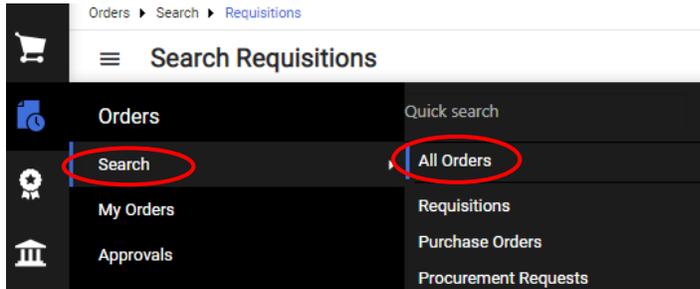
Save Close

Please Note: You must save a search in a Folder. To create a *Personal* folder click [Add New](#) and choose *Top Level Personal Folder*, enter Name of Folder (i.e. My Searches) then click [Save Changes](#).

Run Reports

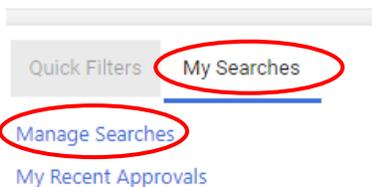
Run Saved Searches

- When you save a search, a shortcut is created for you. To get to the shortcut go to  hover over *Search* and click *All Orders*.

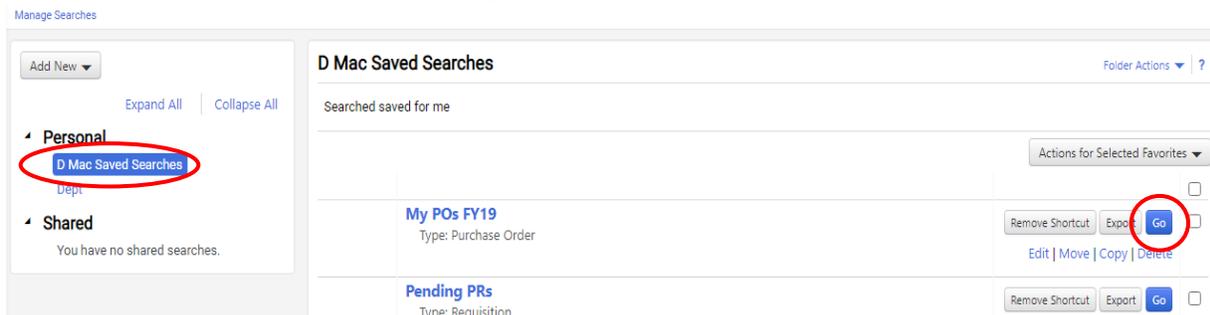


- Under *My Searches*, click [Manage Searches](#).

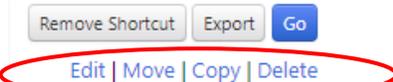
Search All Orders



- Click on a folder to see your saved searches in that folder. To run a saved search, click [Go](#). You can export the results to Excel by following the steps in the Export Results to Excel section on page 3.



- Click *Edit* to change the name of the search, *Move* to change the folder, *Copy* to duplicate the search, *Delete* to remove the search.



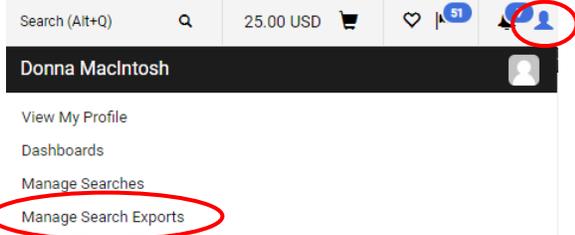
- Click [Export](#) to export results directly to Excel, then follow the steps in the Export Results to Excel section on page 3, starting with step 2.



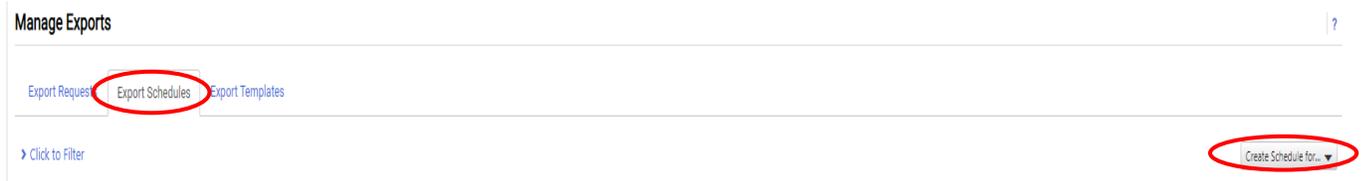
Run Reports

Schedule Saved Search Exports

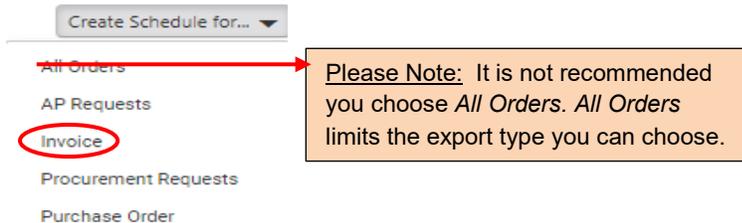
1. You can schedule an export file of a saved search to create automatically on a daily, weekly, monthly, etc. basis.
2. Click on your profile icon  in the upper right corner of the screen, then click *Manage Search Exports*.



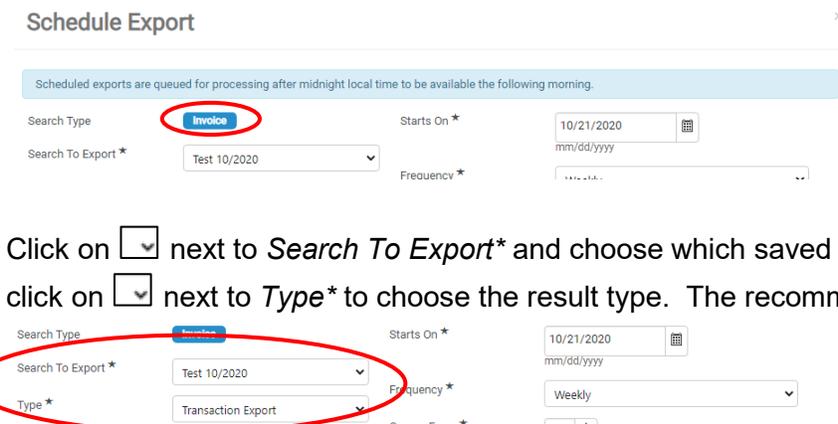
3. The *Manage Exports* page opens. Click on *Export Schedules* tab, then click *Create Schedule for...*



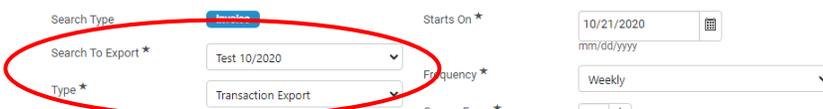
4. The *Create Schedule for...* will expand so that you can select the type of search report from your saved searches you wish have generate automatically.



4. The *Schedule Export* window opens. In the example below, the *Search Type* selected was *Invoice* so you would be able to choose saved invoice searches from one of your personal folders.



5. Click on next to *Search To Export** and choose which saved search you want to schedule, then click on next to *Type** to choose the result type. The recommended type is *Transaction Export*.



Run Reports

6. Select how often the export is automatically created in the *Frequency*, *Occurs Every* and *Export Until* required options (★), then click **Save**.

Search Type: Invoice
 Search To Export: Test 10/2020
 Type: Transaction Export
 Format: CSV
 Starts On: 10/21/2020
 Frequency: Weekly
 Occurs Every: 1 week(s) on
 Export Until: No End Date
 Save

7. To make changes to a scheduled export, click *Export Schedules* tab.

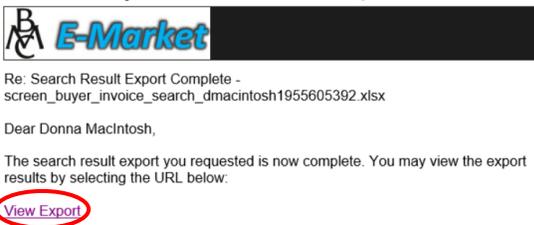
Export Requests **Export Schedules** Export Templates

Search To Export	Status	Created	Export Content	Frequency	Ending	Next Run	Actions
All Orders	Ended	10/21/2020 3:07:27 PM	Search Type: All Orders Export Content: Screen Layout- Excel	Daily	0 of 1 remain	-	Enable
Event Planning	Ended	10/21/2020 3:04:22 PM	Search Type: All Orders Export Content: Screen Layout- Excel	Daily	0 of 1 remain	-	Enable
Test 10/2020	Ended	10/20/2020 3:48:04 PM	Search Type: Invoice Export Content: Transaction Export- CSV	Weekly	0 of 1 remain	-	Enable
Test 10/2020	Enabled	10/20/2020 12:40:40 PM	Search Type: Invoice Export Content: Screen Layout- Excel	Daily	1 of 1 remain	10/29/2020 12:00:00 AM	Edit

8. For the scheduled export you want to change, under *Actions* click then choose *Edit* to change the schedule, *Delete* to delete it or *Disable* to stop it from running. If you previously disabled a scheduled export, click then choose *Enable* if you want it to start running again.



9. Each time your scheduled export is created automatically you will receive an email. Click on [View Export](#).



10. If already logged into E-Market, you will be brought to the *Manage Exports* page, *Export Requests* tab. To open the export file, click on file name in blue.

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Test export Export request for Invoice	Completed	Invoice	Screen Layout (Excel)	10/20/2020 10:28:19 AM	10/20/2020 10:28:25 AM	10/27/2020	Total Records: 4	Delete

11. Click archive_transaction....zip that will appear at the bottom of your screen, double click on file listed in zipped folder. Your Excel file will open.