WISBuy Admin Quick Guide: Document Searches

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Document Search

Login to WISBuy (http://WISBuy.wi.gov) and select the **WISBuy Orders & Requests** icon (which looks like three stacked documents) from the toolbar on the left, then select **Search Documents** (under the Document Search menu). This will take you to either the Simple Search page (which will display only a single search bar) or the Advanced Search page (which offers a number of ways to search for information). If you are on the Simple Search page, access the Advanced Search page by clicking the **Advanced Search** button.

At the top of the Advanced Search page, select **Purchase Orders** from the Search dropdown menu to limit your search results to POs, then select or enter additional search criteria (e.g., date range, supplier, specific user) and click **Search**. On the Search Results page, you can further refine the results by adding additional filters on the left of the screen. To view the details of an order, click the **WISBuy Order Number** on the corresponding line.

Save Document Searches

If there are searches you run frequently, you may want to save the search to run again in the future. To do this, create a search using the instructions above. From the Search Results page, click **Save New Search**. You will be asked to provide a title ("Nickname") for the search and to indicate which folder you'd like to save the search in. If you plan to export the search results each time it's run, you can update the default export template as well, or you can choose to manually select this option each time you choose to export the search results. When you're finished, click **Save**.

To access a saved search, click the **WISBuy Orders & Requests** icon (which looks like three stacked documents) from the toolbar on the left, then select **View Saved Searches** (under the Document Search menu).

Export Document Search Results

To export your search results to an Excel file, begin by creating a search using the instructions above. From the Search Results page, click the **Export Search** button. You will be asked to provide a file name and may add a description if you like. You will also need to indicate the type of report you'd like to see from the **Request Export Template** dropdown menu:

- **Screen Export** will download the information shown on the Search Results page.

- **Transaction Report** will download all details for each line item in every order included in the search. These reports include lots of data and tend to be very large.

- **Full Export** will download all information attached to the order, including the contract summary information, addresses, product codes, and much, much more (in total, over 100 columns of information).

- **Your Export Template** will download a report you've created. If you select this option, the next window will allow you to adjust the fields in your template before downloading the information into Excel. *(See section below for instructions to create a Template.)*

After selecting the type of export you'd like, click **Submit**. A popup window will open and confirm that the export request has been submitted and will remind you how to find the report. Click **Go to Page: Download Export Files** to quickly access the page. To access the page at a later time, click the **WISBuy Orders & Requests** icon (which looks like three stacked documents) from the toolbar on the left, then select **Download Export Files** (under the Document Search menu).

To open the downloaded export, click on the **File Name** (.zip) and follow any on-screen instructions from your browser (e.g., clicking **Open** or **Save** on the bottom of the screen in Internet Explorer). Once the folder has been downloaded to your computer (usually in your Downloads folder, open the file to unzip the document (if there are multiple files, open the largest file). After opening the file in Excel, be sure to save the file in an Excel format in order to save any changes you make.

Customized Reports: Create an Export Template

When exporting document search results, you have the option of selecting the type of report you'd like to download. In addition to the three pre-made export options, you may also create a customized Export Template, allowing you to select the information that is most relevant to you without needing to filter or delete data once it's in Excel.

To create a customized Export Template, click the **WISBuy Orders & Requests** icon (which looks like three stacked documents) from the toolbar on the left, then select **Create and Manage Export Templates** (under the Document Search menu). Click **Create Template for…** to view the dropdown menu, then select the type of documents to be included – we recommend selecting **Purchase Orders**. This will open the Customize Export popup window where you can customize your report. Below are the settings we've found most useful:

Select what you want to include in your export:	
Note: WISBuy does not use Custom Fields, so many of these options will have no effect on the results.	
How do you want your custom export file?	● Separate files ○ All in one file
Which Custom Fields do you want?	● All ○ None ○ Let me choose
Do you want Custom Fields as columns in your Data File?	● Yes ○ No
Which Custom Field Export Files do you want?	☐ Custom Fields – Header Level
	☐ Custom Fields – Line Level
Which additional Export Files do you want?	☐ Form Data
	☐ Supplier Data

Select your fields:	
Note: Only the recommended options are shown; there are many other options available.	
☑ WISBuy Order #	☑ Quantity
☑ Creation Date	☑ Requisitioner
☑ Amount/UOM & UOM	☑ ShipTo Address 1
☑ Buyer Phone	☑ ShipTo Address 2
☑ Buyer Email	☑ ShipTo Address 3
☑ Category Name	☑ ShipTo Address 4
☑ Commodity Code	☑ ShipTo Address Code
☑ Contract No	☑ ShipTo Address Internal Name
☑ Department *(for DOC only)*	☑ SKU/Catalog #
☑ Extended Price	☑ Supplier Commodity Code
☑ Last 4 Digits of Credit Card Number	☑ Supplier Name
☑ Manufacturer	☑ Unit Price
☑ Mfr Catalog #	☑ UNSPSC
☑ Product Description	☑ WISBuy Order Line #
☑ Product Size	☑ Workflow Completion Date *(DOC only)*

Once you've selected your customizations, provide a **Template Name** and **Description**, then click **Save**. To access your customized Export Template, click the **WISBuy Orders & Requests** icon (which looks like three stacked documents) from the toolbar on the left, then select **Create and Manage Export Templates** (under the Document Search menu). Your customized report will be listed under the My Templates folder. To edit this report, click the **Template Actions Menu** in the upper right corner.