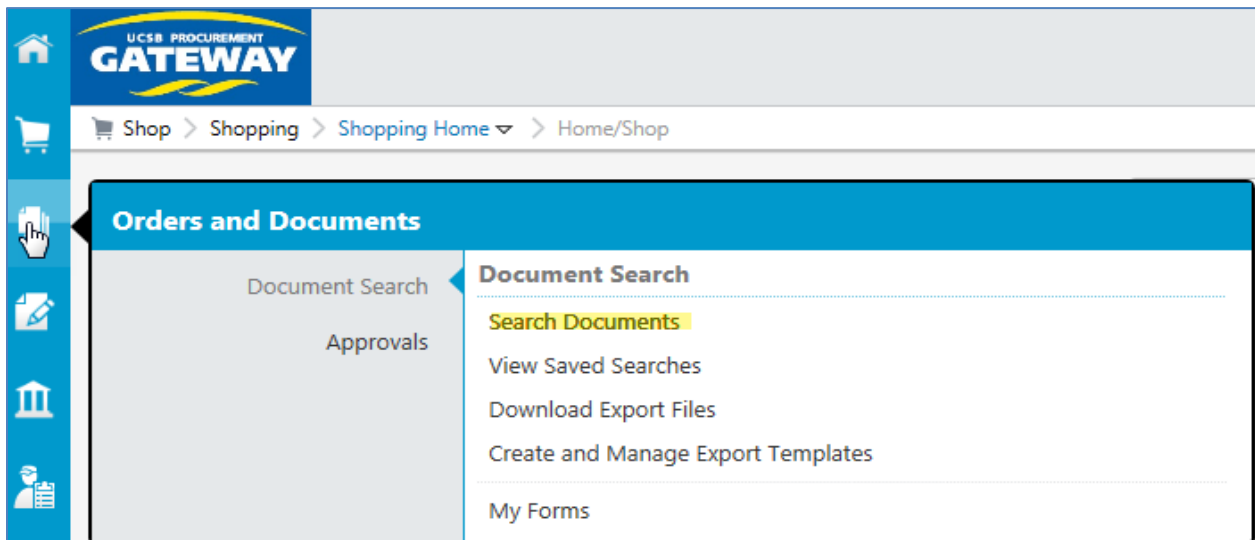


## VENDOR BLANKET LIST AND EXPORT

Instructions on running a document search for Vendor Blanket Purchase Orders and optionally exporting to a “csv” file. The exported data will include PO data, start and end dates as well as invoices processed on the PO.

### Vendor Blanket List Export

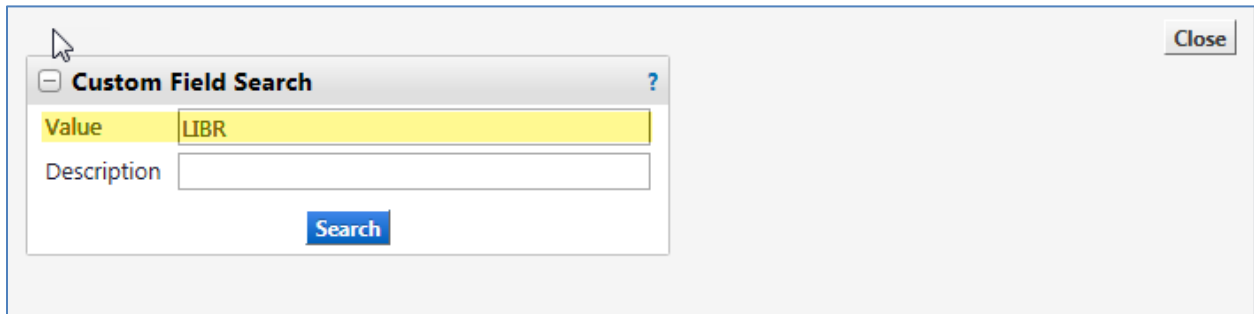
Start at the Gateway home page. Inside the blue bar on the left hand side, select the 3<sup>rd</sup> icon which is Orders and Documents, and select Search Documents.



Then select advanced search. In the upper left corner in the search bar drop down, select “purchase orders.” On the same screen, in the Item/Product Information section, enter “Vendor Blanket” in the Form Name field.

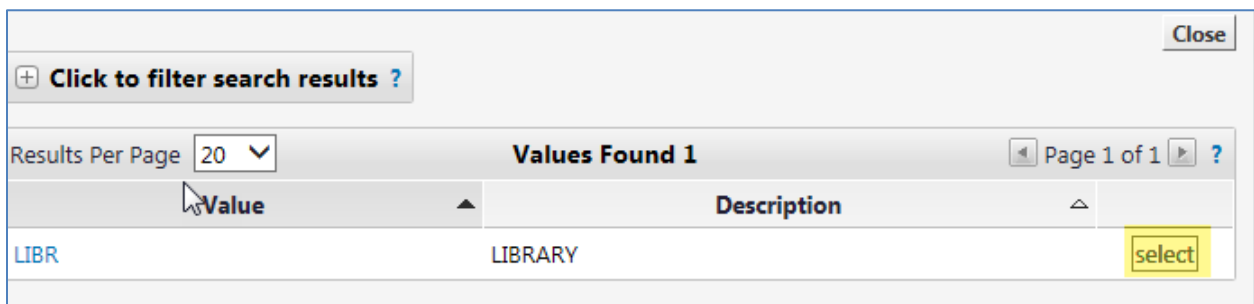
A screenshot of the advanced search form for Purchase Orders. The search bar at the top left is set to 'Purchase Orders' and has a 'Go' button. The form is divided into three sections: 'Purchase Order Identification' with a 'Purchase Order Number(s)' field; 'Purchase Order Information' with fields for 'Participant(s)', 'Owner', 'Prepared By', 'Approved By', 'Date' (with a dropdown for 'Creation Date (System)' and 'All Dates'), 'Total Amount', and 'Supplier'; and 'Item/Product Information' with fields for 'Catalog Number(SKU)', 'Product Description', 'Commodity Code', 'Form Name' (with 'Vendor Blanket\_x' entered), and 'Form Type'. A 'simple search' link is visible in the top right corner.

Scroll down the page to the Custom Fields section, department and click on “select from all values”. In the value field type your 4 character department code and click Search.



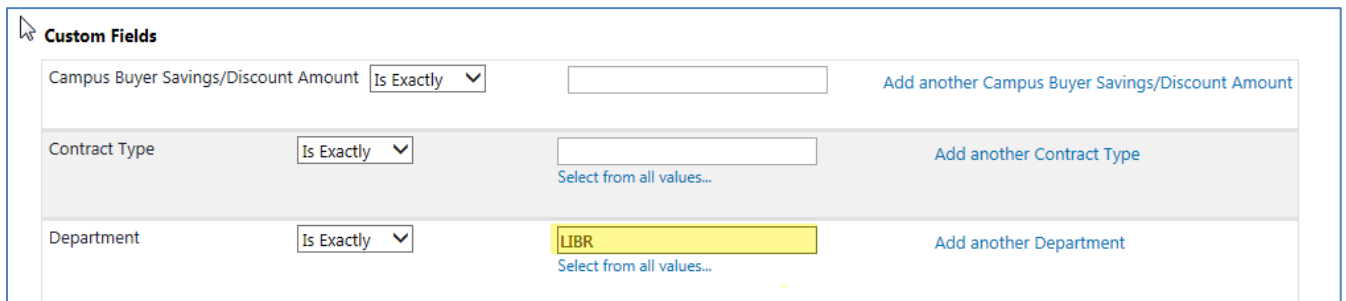
A dialog box titled "Custom Field Search" with a "Close" button in the top right corner. It contains a "Value" field with "LIBR" entered, a "Description" field, and a "Search" button at the bottom.

Then click “select” to the right of your department code.



A table showing search results. The table has two columns: "Value" and "Description". The first row contains "LIBR" in the "Value" column and "LIBRARY" in the "Description" column. A yellow "select" button is located to the right of the "LIBR" value. Above the table, there is a "Results Per Page" dropdown set to "20", a "Values Found 1" indicator, and a "Page 1 of 1" indicator. A "Click to filter search results ?" button is also present.

You will then see your department code in the department field.



The "Custom Fields" section of a form. It contains three rows of fields:

- Campus Buyer Savings/Discount Amount: Is Exactly [dropdown] [input field] Add another Campus Buyer Savings/Discount Amount
- Contract Type: Is Exactly [dropdown] [input field] Select from all values... Add another Contract Type
- Department: Is Exactly [dropdown] LIBR [input field] Select from all values... Add another Department

Now click on the blue “Go” button at the top or bottom of the screen to see your search results.

On the search results screen, click on “Export Search.”

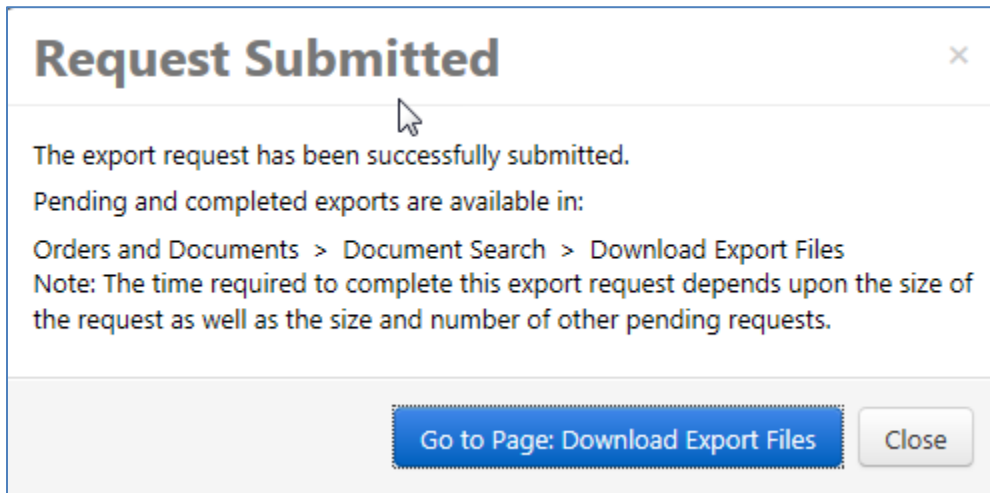
The screenshot shows a search results page. On the left, there is a sidebar with navigation icons. The main content area is divided into two sections. The top section, titled "Search Details", contains the following information: "Search Terms" (empty), "Form Name" (Vendor Blanket), "Filtered by" (Type: Purchase Orders, Date Type: Creation Date (System), Date Range: All Dates), and "Department" (Is Exactly: LIBR). Below this are buttons for "Save New Search" and "Export Search". The bottom section, titled "Showing 1 - 20 of 104 Results", features a "Results Per Page" dropdown set to 20 and a table of results.

PO No	Supplier
✓ GW0000150295	FRONTIER COMMUNICATIONS
✓ GW0000144337	BACKSTAGE LIBRARY WORKS
✓ GW0000141694	ARROWHEAD DIRECT
✓ CR002142	UCSB Blanket Change
✓ GW0000139935	DATA CURATION EXPERTS LLC
✓ GW0000138002	BOYD MOVE MANAGEMENT INC

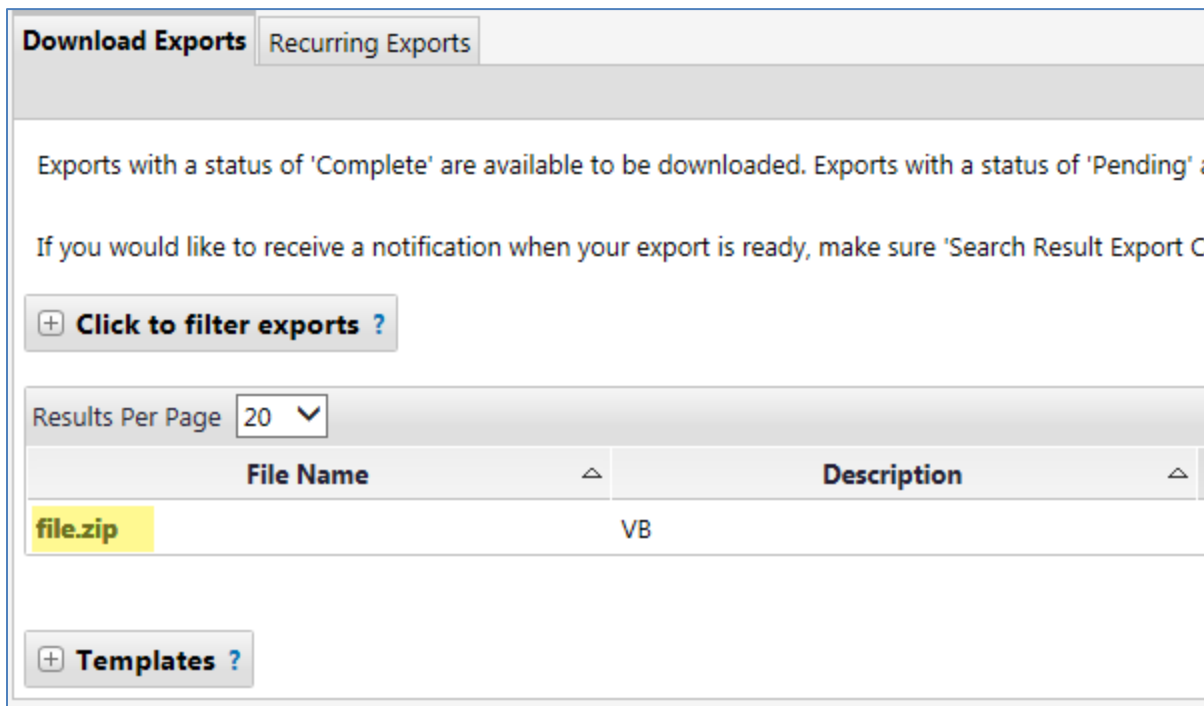
Inside the Document Search Export screen, enter a file name and description, then select “Vendor Blanket List” from the Request Export Template dropdown. Click Submit.

The screenshot shows the "Document Search Export" form. The title "Document Search Export" is at the top. Below it is a section titled "Request Export (Step 1 of 1)". The form contains the following fields: "File Name" (required, with a star icon) containing "Library VB List"; "Description" containing "List of VBs for Library"; "Request Export Template" (required, with a star icon) dropdown menu showing "Vendor Blanket List"; and another "Description" field containing "Vendor Blanket list export". There is a checkbox labeled "Further customize this export template?" which is currently unchecked. At the bottom left, there is a legend for the star icon: "★ Required". At the bottom right, there is a blue "Submit" button.

The “Request Submitted” screen will appear and you can click on “Go to Page: Download Export Files”.



After the export is complete, click on the blue file name to download the zip file.



Select “Save as” from the dropdown and choose your file destination.

