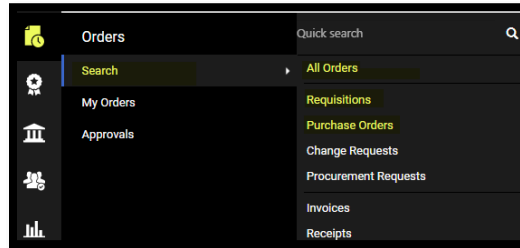


iShopUTRGV Quick Reference Guide

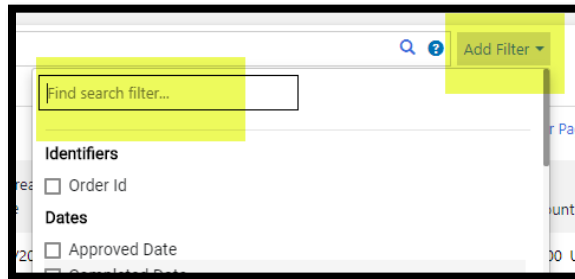
How to - Run A Report

iShopUTRGV allows users to run customized reports and export data. *Questions can be emailed to: ishop@utrgv.edu

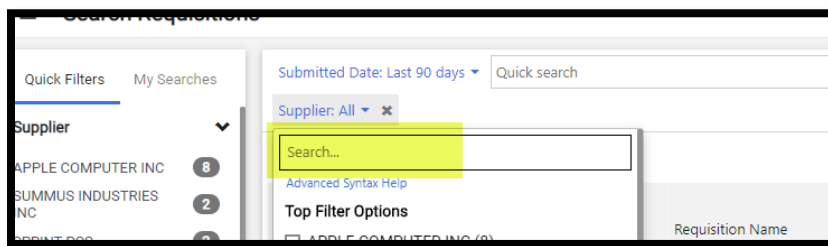
1. Go to “Orders” followed by “Search” and select one of the available options for the search:



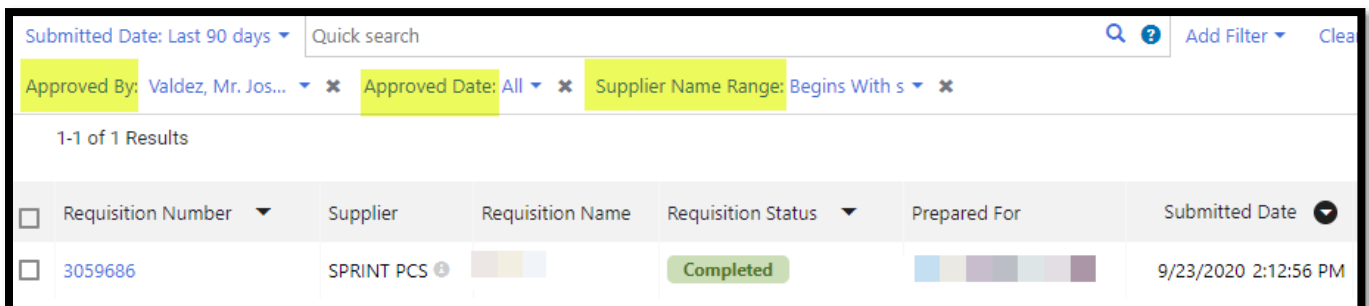
2. The screen will refresh and display search results. You can use the option to “Add Filter” and search by multiple fields that can be exported on a report such as Approver, Approval Date, Supplier Name, Cost Center or Project, Date Range, etc.



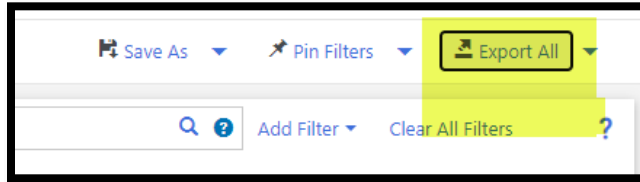
3. Once you select a field you would like to filter by, a box will display, where you may type information related to the filter you selected.



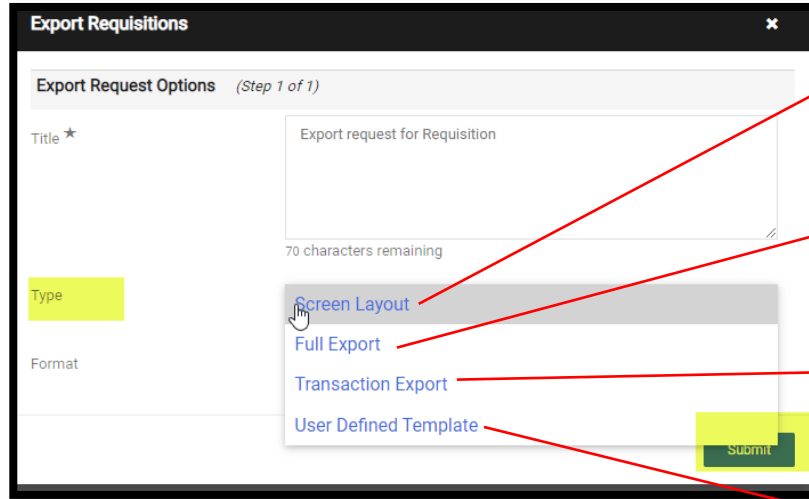
4. Once you have selected any filters, if applicable, page will refresh and show an overview of the filtered data.



5. On the upper righthand side, click “Export All”

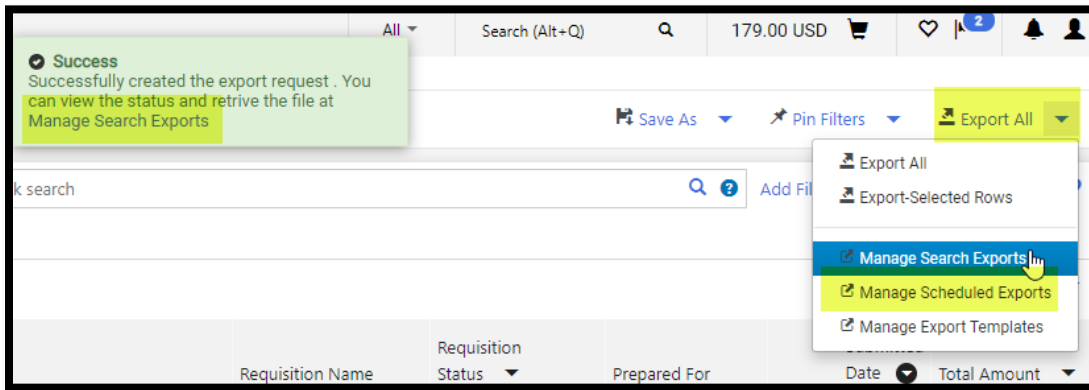


6. On the “Document Search Export” page, populate the “File Name” field, select the export type from the “Request Export Template” drop down, and click “Submit”.



- Screen Export is the most basic report, which will provide the following information: Requisition Status, Requisition Number, Supplier(s), Requisition Name, Requisitioner, Requisition Date, and Requisition Total.
- Full Export will generate several reports including the approval history, supplier data, line data, and form data.
- Transaction Export will provide a more detailed report including: etypes, form type, the product description, etc.
- Select User Defined Template if you already have a pre-defined template for your exports.

7. A confirmation notification will display once submitted, click on one of the “Manage Search Export” options. Go to Page:



8. A confirmation page will display the option for you to export your report.

Manage Search Exports

Manage Exports

Export Requests | Export Schedules | Export Templates

Click to Filter Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for Requisition	Completed	Requisition	Screen Layout (Excel)	10/22/2020 9:31:44 PM	10/22/2020 9:31:47 PM	10/29/2020	Total Records: 2	Delete