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Site Basics: Simple Document Search

Simple Search searches for documents based on document type, search terms and date range.

- **Document Type** – In the document type drop-down, you select the type of document you are searching for. You can search for a specific type (Requisition, Purchase Order, Invoice, Receipt, Sales Order or Change Request) or you can search for ALL documents.
- **Search Terms** – In the search box, you enter the term that you are searching for. You can search by Requisition Number, Purchase Order Number, Invoice Number, Supplier Invoice Number, Contract Number Catalog Number, Requisition Name, External Requisition Number and Supplier Name.
- **Date Range** – In the date drop-down box you select the relative date-range for the query. You can choose by number of days, calendar span, fiscal year, all dates, or you can create a custom date range.

Step-by-Step

1. Navigate to **Orders** > **Document Search** > **Search Documents**.
2. Be sure you are on the **Simple Search** page. If you are brought to the **Advanced Search** screen, select **simple search** below the search box. You will automatically be taken to the search screen you last used.
3. Enter a term in the search field and click **Go**.

Site Basics: Advanced Document Search

Advanced Search offers users the option to enter very specific, detailed search criteria, creating a narrower results set. You can perform an advanced search across multiple documents or select a specific document type.

Step-by-Step

1. Go to **Orders** > **Search** > **Search Documents**.
2. Be sure you are on the **Advanced Search** page. If you are brought to the **Simple Search** screen, select the **advanced search** below the search box. You will automatically be taken to the search screen you last used.
3. From the **Search** drop-down box, select the document type or select **All Documents**. The document type from your most recent search will automatically be populated in the drop-down.
4. Enter search criteria. Available criteria varies based on the document-type. Mouse over the search field name or click the **?** located in the top-right corner for a description of each search field.
5. Once you have entered all your search criteria, click **Go**.

Site Basics: Saving Document Searches

If you need to run the same search on a regular basis, you can store the search using the **Saved Search** feature. You can create a saved search that stores search criteria and run it with just a click of a button. Recreating the search and entering the criteria is not necessary. Saved searches are created from the search results page. The application allows users to create their own folders and organize their saved searches. Saved searches can also be shared with the others in your organization.

Saved Search Organization

Saved searches are organized similarly to Favorites. Users create folders in which to store their saved searches, helping them to easily locate and manage them. Folders can be created in the **Saved Searches** page or on the fly when saving a search. Saved searches can also be managed from the **Saved Searches** page. Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. You can also add a saved search as a shortcut on your main search.

Click an item below for information about performing the saved search task.

Create a folder for saved document searches.

Please note that you can also create a folder on the fly when saving a search. You will be presented with the option to create a new folder. If you choose to do so, you can follow the same steps as below.

1. Navigate to **Orders** > **Search** > **View Saved Searches**.
2. Select the **New** button in the top left.
3. Select the type of folder you would like to create;

   Top level personal folder – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
4. Enter a name and description for the folder.
5. Select **Save**. A new folder will be added to the area you selected.

Run a saved search

1. Go to **Orders** > **Search** > **View Saved Searches**.
2. Locate the search you would like to run and click the **Go** button.
3. Your search will be executed.

Site Basics: Exporting Document Searches

You can export a document search for reporting and analysis purposes. Exports can be performed directly from the document search results or from a saved search.

Step-by-Step

1. Use one of the following methods to access and export document search results.

- **Export from a new document search** - Navigate to **Orders** **> Search > Search Documents**. Perform a document search. On the results page click the **Export Search** button located in the **Filtered by** area located on the top-left side of the screen.
- **Export from a saved search** - Navigate to **Orders** **> Search > View Saved Searches**. Locate the saved search you would like to export and click the **Export** button.

2. The **Document Search Export** screen is displayed. Configure the export.
   - **File Name** - Enter the name for the file.
   - **Description** - Enter a description. The description displays with the file on the screen where exports are downloaded.
   - **Request Export Template** - Select the export template for the data.
   - **Screen Export** – Exports only the information available in the search results screen for each document.
   - **Transaction Export** – Exports an expanded set of information on the documents. For invoices, only those invoices with line items will be included in this format.
   - **Full Export** – Exports transaction with history. For invoices, only those invoices with line items will be included in this format.
   - **Custom Export Templates** - You may have created custom export templates or have access to shared custom export templates. If one or more custom templates is available to you, they will display below a dotted line after the standard extract types. When a custom template is selected, the **Further customize this export template?** option displays. If you would like to further customize the export, select **Next**. If not, proceed to the next step. For information about configuring custom export templates, please see [Creating a Customized Document Search Export Template.]
3. Click the **Submit** button. The export will execute. If you remain on the screen a pop-up notification will display when the export is complete. You can click on this notification to be taken to the **Download Export Files** page to retrieve the file. Alternatively, you can access that page by navigating to **Orders** **> Search > Download Export Files**. **Important Note**: Files are stored in the system for a finite period of time specified by your organization. They are deleted when the time period has passed. Contact your system administrator to confirm the length of time your files will be stored.