



Quick Reference Guide

Using Document Search



In This Guide

- ✓ Getting results with document search
- ✓ Filtering document search results
- ✓ Exporting search results
- ✓ Saving searches

Procedure

1. Hover over the **Orders** tab, then hover over **Search**, click **All Orders**.

The screenshot shows the top navigation bar with a search bar and user profile. Below it, a sidebar menu is open, showing 'Orders' and 'Search' selected. A dropdown menu is visible under 'Search', listing 'All Orders', 'Requisitions', 'Purchase Orders', and 'Procurement Requests'. The main content area shows a grid of supplier logos including Fisher Scientific, VWR International, Millipore Sigma, ThermoFisher Scientific, BIO-RAD, Cell Signaling Technology, HENRY SCHEIN, QIAGEN, IDT, USA Scientific, and abcam.

2. All orders are displayed. Clicking the arrow within the column results in sorting the list in ascending/descending order per that column.

The screenshot shows the 'Search All Orders' page. The table has columns for Order Identifier, Type, Order Status, Order Owners, Created Date/Time, Completed Date, Supplier, and Total Amount. Red arrows point to the sorting arrows in the 'Order Identifier', 'Created Date/Time', and 'Total Amount' columns. The table contains several rows of order data.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
3363249	Requisition	Pending	Patrick Defourneaux	10/19/2021 8:51:48 AM		Office Depot VWR International	3,534.22 USD
N0022006	Purchase Order	Complete	Patrick Defourneaux	10/18/2021 3:35:47 PM	10/18/2021 3:36:31 PM	Office Depot	325.40 USD
3362001	Requisition	Complete	Patrick Defourneaux	10/18/2021 2:25:17 PM	10/18/2021 3:35:47 PM	Office Depot	325.40 USD
N0022005	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 3:20:26 PM	9/13/2021 3:21:11 PM	W.W. Grainger, Inc.	170.92 USD
3337739	Requisition	Complete	Patrick Defourneaux	9/13/2021 1:53:09 PM	9/13/2021 3:20:27 PM	W.W. Grainger, Inc.	170.92 USD
N0022004	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 1:47:50 PM	9/13/2021 1:48:51 PM	W.W. Grainger, Inc.	85.46 USD

Using Document Search



3. Clicking **Type of Order** and selecting either Purchase Order or Requisition can narrow the search.

Order Identifier	Type	Order Status	Order Owners	Date/Time	Completed Date	Supplier	Total Amount
N0022006	Purchase Order	Complete	Patrick Defourneaux	10/18/2021 3:35:47 PM	10/18/2021 3:36:31 PM	Office Depot	325.40 USD
N0022005	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 3:20:26 PM	9/13/2021 3:21:11 PM	W.W. Grainger, Inc.	170.92 USD

4. Clicking **Created Date** gives the option to narrow the search by dates.

Order Identifier	Type	Order Status	Order Owners	Date/Time	Completed Date	Supplier	Total Amount
N0022006	Purchase Order	Complete	Patrick Defourneaux	10/18/2021 3:35:47 PM	10/18/2021 3:36:31 PM	Office Depot	325.40 USD
N0022005	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 3:20:26 PM	9/13/2021 3:21:11 PM	W.W. Grainger, Inc.	170.92 USD

5. Clicking **Add Filter** opens a list of filters that can be selected to narrow the search.

Order Identifier	Type	Order Status	Order Owners	Date/Time	Completed Date	Supplier	Total Amount
N0022006	Purchase Order	Complete	Patrick Defourneaux	10/18/2021 3:35:47 PM	10/18/2021 3:36:31 PM	Office Depot	325.40 USD
N0022005	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 3:20:26 PM	9/13/2021 3:21:11 PM	W.W. Grainger, Inc.	170.92 USD
N0022004	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 1:47:50 PM	9/13/2021 1:48:00 PM	W.W. Grainger, Inc.	304.00 USD
N0022003	Purchase Order	Complete	Patrick	9/13/2021 1:40:47 PM	9/13/2021 1:45:00 PM	W.W. Grainger, Inc.	304.00 USD

Using Document Search



6. In this example, Supplier was chosen. Select the desired Supplier from the list. Click **Apply**.

The screenshot shows the 'Search All Orders' page with the following filters: Type of Order: Purchase Order, Created Date: Last 90 days, and Supplier: All. A dropdown menu for the Supplier filter is open, showing 'Office Depot (4)' selected. A red box highlights the 'Supplier: All' filter, and a red arrow points to the 'Office Depot (4)' option. The 'Apply' button is also visible.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
NO022003	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 1:40:47 PM	9/13/2021 1:45:20 PM	W.W. Grainger, Inc.	85.46 USD
NO022003	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 1:47:50 PM	9/13/2021 1:48:51 PM	W.W. Grainger, Inc.	85.46 USD
NO022003	Purchase Order	Complete	Patrick Defourneaux	9/13/2021 3:20:26 PM	9/13/2021 3:21:11 PM	W.W. Grainger, Inc.	170.92 USD
NO022003	Purchase Order	Complete	Patrick Defourneaux	10/18/2021 3:35:47 PM	10/18/2021 3:36:31 PM	Office Depot	325.40 USD

7. Click **Save Changes** to save the search with the selected filters for future use.

The screenshot shows the 'Office Depot 180days' search results page. The 'Save Changes' button is highlighted with a red box. The search filters are: Type of Order: Purchase Order, Created Date: Last 180 days, Supplier: Office Depot, and Total Amount: Greater Than 500. The results table shows 2 results.

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
NO021983	Purchase Order	Complete	Kyle Walker	6/22/2021 3:59:11 PM	6/22/2021 3:59:51 PM	Office Depot	504.37 USD
NO021975	Purchase Order	Complete	Denise Youngblood Patrick Defourneaux	6/21/2021 10:47:54 AM	6/21/2021 10:48:25 AM	Office Depot	522.49 USD

8. Type a name for the search and click **Save**.

The screenshot shows the 'Save Search' dialog box. The 'Nickname' field contains 'Office Depot 180days'. The 'Save' button is highlighted.

Step 1: Details

Nickname * Office Depot 180days

Step 2: Select Folder Destination

Personal You have no personal searches.

Shared You have no shared searches.

Save Close

Using Document Search



9. A shortcut is created listed under **My Searches** for the saved search with filters.

Office Depot 180days (Modified)

Quick Filters: **My Searches**

Supplier: Office Depot X Total Amount: Greater Than 500 X

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
N0021983	Purchase Order	Complete	Kyle Walker	6/22/2021 3:59:11 PM	6/22/2021 3:59:51 PM	Office Depot	504.37 USD
N0021975	Purchase Order	Complete	Denise Youngblood Patrick Defourneaux	6/21/2021 10:47:54 AM	6/21/2021 10:48:25 AM	Office Depot	522.49 USD

10. The search can be exported to Excel by clicking **Export All**. Click **Submit** in the pop-up window.

Office Depot 180days (Modified)

Export All

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
N0021983	Purchase Order	Complete	Kyle Walker	6/22/2021 3:59:11 PM	6/22/2021 3:59:51 PM	Office Depot	504.37 USD
N0021975	Purchase Order	Complete	Denise Youngblood Patrick Defourneaux	6/21/2021 10:47:54 AM	6/21/2021 10:48:25 AM	Office Depot	522.49 USD

11. Click **Manage Search Exports**

Success
Successfully created the export request. You can view the status and retrieve the file at Manage Search Exports

Export All: Export All Additional options

Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount
N0021983	Purchase Order	Complete	Kyle Walker	6/22/2021 3:59:11 PM	6/22/2021 3:59:51 PM	Office Depot	504.37 USD
N0021975	Purchase Order	Complete	Denise Youngblood Patrick Defourneaux	6/21/2021 10:47:54 AM	6/21/2021 10:48:25 AM	Office Depot	522.49 USD



12. Click **Export request for All Orders** to download the Excel spreadsheet.

Manage Search Exports

Export Requests | Export Schedules

Click to Filter Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for All Orders	Completed	All Orders	Screen Layout (Excel)	11/15/2021 11:26:02 AM	11/15/2021 11:26:08 AM	11/22/2021	Total Records: 2	Delete

screen_all_docs_pdfou-1229344811 [Protected View] - Excel

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

A11 : X ✓ f NO021983

Export request for All Orders								
Search Criteria								
Created Date	Last 180 days							
Type of Order	Purchase Order							
Supplier	Office Depot							
Total Amount	Greater Than 500							
Order Identifier	Type	Order Status	Order Owners	Created Date/Time	Completed Date	Supplier	Total Amount	
NO021983	Purchase Order	Complete	Kyle Walker	06/22/2021 3:59 PM	06/22/2021 3:59 PM	Office Depot	504.37	
NO021975	Purchase Order	Complete	Patrick Defourneaux, Denise Youngblood	06/21/2021 10:47 AM	06/21/2021 10:48 AM	Office Depot	522.49	

Results-1