

In This Guide

- ✓ Creating an Advanced Search
- Creating a folder to store Saved Searches
- ✓ Creating a new Saved Search
- ✓ Adding a shortcut for your Saved Search to the main Document Search page

You may find yourself performing the same searches time and again, for instance you might need to check on all activity on a certain account. This procedure will demonstrate how to save your searches so that you can perform them at will without having to enter the criteria each time. It will also demonstrate how to create a folder to store your Saved Searches in and how to add a shortcut to the main Document Search page so that your Saved Searches are easily accessible.

Procedure

1. Navigate to the main Document Search page by hovering over the "Orders & Documents" icon on the left hand navigation bar. This will open the fly-out menu for "Orders & Documents".

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Ĵ,	🚬 🐚 Shop) Shopping) Dashboard) Shopping Home) Home/Shop	D Logout
	Orders & Documents	Go
4	Document Search Search Documents	Browse: suppliers categories contracts chemicals
4	Approvals Search Documents View Saved Searches	[Manage Showcases]
1	Download Export Files	
	computer or network must be coded under the appropriate "data processing" account codes. Examples:	#: 96ADV
8	If a copier is a multi-functional copier (also performs scanning, faxing, etc.), the rental or lease charge should be coded as subcode 8065	D ?

2. Hover over "Document Search" and then select and click "Search Documents" on the right-hand side of the "Orders & Documents" menu.

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	Orders & Documents	Go
	Document Search	Browse: suppliers categories contracts chemicals
	Approvals Search Documents View Saved Searches	[Manage Showcases]
血	Download Export Files	2 ?
2	computer or network must be coded under the OS-112660-JAB CONTRACT #: 90	ADV



3. This will open the "Document Search" main page and it defaults to the "Simple Search" bar that allows you to search documents by entering search terms such as document numbers, suppliers, and product information.

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Þ	Orders & Documents Document Search Documents Document Search			Dogout
	Search Requisitions Enter search terms such as docume	All Dates	Go	
	Go to: advanced search my re	quisitions my purchase orders my invoices		_

4. To do more intricate searches such as searching for all documents that use a particular Account Code, you will need to use the "Advanced Search" by clicking the link beneath the Simple Search bar.

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	OK GORRAL				2
	Orders & Documents >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>				🗂 Logout
				<u>٦</u>	
1	Search Requisitions -	All Dates	▼ Go		
	Enter search terms such as document	numbers, suppliers, and product information.			
1					
×	Go to: advanced search Ay requi	isitions my purchase orders my invoices			

5. Clicking on "advanced search" will open the "Advanced Search" page that allows you to configure your search around specific key criteria.

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È	Orders & Documents Document Search	Search Documents	Search					🔁 Logout	
-		Go to: simp	le search my requisitions	my purchase orders m	iy invoices				
		Search Requisitions				simple search			
		Search Requisitions				Simple Search			
Ø			G	D					Ξ
血		Requisition Identification							
		Requisition Number(s)							
2		Requisition Name							
		Requisition Information							
u.		Participant(s)				م			
();		Prepared For				م		l	_
•		Prepared By				٩			
•		Approved By				٩			
~			Submit Date	✓ All Dates	•				
		Total Amount	•						
		Supplier							
		Department				Q			
		Item/Product Information							
		Catalog Number(SKU)							
		Product Description							
		Commodity Code				۹			
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6. For our example we're going to look at all requisitions created within the last 7 days. Under the heading "Requisition Information" the 5th item is "Date" and there are some options to choose from. We're choosing "Submit Date" and "Last 7 Days".

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		Go to: sim	ple search my requisitions my p	urchase orders my invoices				
	5	Search Requisitions			simple search]		
2			Go					:
血		Requisition Identification						
		Requisition Number(s)						
2		Requisition Name						
		Requisition Information						
<u>ll.</u>		Participant(s)			Q			
		Prepared For			<u>م</u>			L
		Prepared By			Q			
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\$		Date	Submit Date 🔹	All Dates 🔹				
		Total Amount	▼	All Dates				
		Supplier		Days				
		Department		Last 7 days	10			
		Item/Product Information		Last 60 days				
		Catalog Number(SKU)		Last 90 days Last 120 days ≡				
		Product Description		Yesterday				
		Commodity Code		Today	2			

7. Making these selections we click on the blue "Go" button centrally located at the top and bottom of the page.

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	OK GURRAL				2	
	Orders & Documents > Document Search > Search Documents	ch			🔁 Logout	
	Go to: simple se	arch my requisitions my purchase orders my invoices	simple search			
	Requisition Identification	Go				н

8. Our search yielded several pages of results and searches you perform may yield more or less depending upon your search criteria. To save your search you should click on the blue "Save Search" on the left-hand side of the screen.

OK CORRAL			JAMES MICHAEL GARDNER	🔻 🛛 🖈 🛛 Action Items 🗧	Notifications	57.85 USD 🛛 🕰
Orders & Documents > Document Sear	ch \rangle Search Documents	✓ > Document Search				🔁 Logout
Start New Search Edit Search	Showing 1 - 200 of 9	06 Results	Last 7 days (8/21/2014-8/27/	/2014)		
Filtered by	Results Per Page 2	00 🗸	Sort by: Best match	•	Page 1	🕶 of 5 🕨 🗋 📍
Date Type: Submit Date	Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
Date Range: Last 7 days	2 53654019 🕰	Staples	Jannice, Staples 8-27-14	Jannice Hicks	8/27/2014 2:49 PM	61.27 USE
Save Search Export Search	<i>2</i> 53654359 🔍	Staples	2014-08-27 sew 03	SHARON E WILLIAMS	8/27/2014 2:33 PM	152.20 USE
Save Search Export Search	<i>2</i> 53653609 🔍	GovConnection	2014-08-27 jalivel - Telephony Tester	Jay Lively	8/27/2014 2:32 PM	1,564.47 USE
Refine Search Results ?	2 53653629 🗟 🛈	DUNHAMS ASPHALT SERVICES INC	2014-08-27 Dunhams Asphalt	CHARYL LYNN TURNER	8/27/2014 2:29 PM	7,327.00 USE
Туре	🗸 53557895 🔍	CDW Government LLC.	2014-08-25 andrew 01(Hobbs)	ANDREW DAVID	8/27/2014 2:27 PM	284.78 USE

9. This will open a pop-up window titled "Add to Saved Searches"

	Filtered by	Results Per Page 200 - Sort by: Best match -		✓ Page 1	▼ of 5 🕨 🗅 ?
	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	c Ir	Requisition Date/Time	Requisition Total
Ē	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details		8/27/2014 2:49 PM	61.27 USD
8	Save Search Export Search	Document Search Nickname	MS	8/27/2014 2:33 PM	152.20 USD
Ĩ				8/27/2014 2:32 PM	1,564.47 USD
1.0	Refine Search Results 📄 ?	Add Description	RNER	8/27/2014 2:29 PM	7,327.00 USD
<u>.</u>	Туре	Step 2: Select Destination Folder			
6 7	Requisitions •	Rew New		8/27/2014 2:27 PM	284.78 USD
	Date Range			8/27/2014 2:26 PM	133.40 USD
\$	Last 7 days	Personal		0,21,20212120111	
-	Workflow Status	Jimbo		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)	Shared		8/27/2014 2:14 PM	9.30 USD
	Pending (247)	- Compellent Orders			
	Withdrawn (20)	Library Acquisitions	olff	8/27/2014 2:09 PM	67,698.48 USD
	Rejected (10)	Psychology Department	ORD	8/27/2014 2:01 PM	84.24 USD
	Supplier 🌾	Requisitions			
	Staples (162)	chand caused outside	LE	8/27/2014 2:00 PM	85.10 USD
	PURCHASING DEPARTMENT (62)	Save Cancel			
	Dell (36)	53051242 🗠 🖲 EAK NUSE α THRUAT SPEC LEAR NOSE and Throat Specialist U8-27-14 Lisa κ Jenkins		8/27/2014 1:58 PM	191.71 USD
	GovConnection (16) [more]	TULSA			

10. This page allows you to give your search a nickname so that you will recognize it when you see it again. We're naming this search "Req-Last 7 Days". You can also add a description by clicking on the "Add Description" link if you like.

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	⊳ [0] ? X	r Requisition Date/Time	Requisition Total
血	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details		8/27/2014 2:49 PM	61.27 USD
a	Save Search Export Search	Document Search Nickname		MS 8/27/2014 2:33 PM	152.20 USD
4		Req-Last 7 Days		8/27/2014 2:32 PM	1,564.47 USD
<u>.</u>	Refine Search Results 2	Add Description		RNER 8/27/2014 2:29 PM	7,327.00 USD
ш.	Туре	Step 2: Select Destination Folder			
8 3	Requisitions 👻	Rew New		8/27/2014 2:27 PM	284.78 USD
	Date Range		^	8/27/2014 2:26 PM	133.40 USD
~	Last 7 days	Personal			

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11. If you have already created a folder to keep your saved searches in you can select that at this time. If you need to create a folder you should select the "New" button under the "Step 2: Select Destination Folder" heading.

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	100 ?	x		Requisition Date/Time	Requisition Total
血	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details				8/27/2014 2:49 PM	61.27 USD
3	Save Search Export Search	Document Search Nickname			/IS	8/27/2014 2:33 PM	152.20 USD
Å		Req-Last 7 Days		_		8/27/2014 2:32 PM	1,564.47 USD
<u>.</u>	Refine Search Results 2	Add Description Step 2- Select Destination Folder		-	NER	8/27/2014 2:29 PM	7,327.00 USD
a >	Type Requisitions	le New				8/27/2014 2:27 PM	284.78 USD
	Date Range	🖻 Personal		Â		8/27/2014 2:26 PM	133.40 USD

12. This will allow you to create your new folder in the "personal folder" area, the "shared folder" area, or in a subfolder area if that is appropriate. We're going to put our saved search in the "personal folder" area so we will select "Top level personal folder".

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	🕮 ? X	r	Requisition Date/Time	Requisition Total
血	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details			8/27/2014 2:49 PM	61.27 USD
a	Save Search Export Search	Document Search Nickname		MS	8/27/2014 2:33 PM	152.20 USD
4		Req-Last 7 Days			8/27/2014 2:32 PM	1,564.47 USD
b.	Refine Search Results 2	Add Description		RNER	8/27/2014 2:29 PM	7,327.00 USD
<u></u>	Туре	Step 2: Select Destination Folder			0.07.0044.0.07.014	20470.000
6 7	Requisitions 💌	R New			8/27/2014 2:27 PM	284.78 USD
	Date Range	Top level personal folder Top level shared folder	^		8/27/2014 2:26 PM	133.40 USD
٥	Last 7 days Workflow Status	Subfolder of selected folder	=		8/27/2014 2:22 PM	139,406.94 USD

13. Another pop-up window will appear that will allow you to name your folder and add a description. We will use "My searches" as both the name and the description but you should name your folder something meaningful to you.

	Refine Search Results 3	Add Description				RNER	8/27/2014 2:29 PM	7,327.00 USD
<u>u.</u>	Туре	Step 2: Selec Create New	v Personal Favorites Folder	🖻 ? X				
		Name Name	My searches				8/27/2014 2:27 PM	284.78 USD
9,	Requisitions 🔹	Descrip	tion My searches					
	Date Range		ing searches		Â	¢.	8/27/2014 2:26 PM	133.40 USD
	Last 7 days 🔻	Persc						
	Workflow Status	Jimb			_		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)	🗉 Share	243 characters remaining	expand clear	-		8/27/2014 2:14 PM	9.30 USD
	Pending (247)	Com						
	Withdrawn (20)	Libra	Save Cancel		U.	lff	8/27/2014 2:09 PM	67,698.48 USD
	Rejected (10)	- Psychology Depar	ment			ORD	8/27/2014 2:01 PM	84.24 USD



14. Click on the blue "Save" button to save your new folder. Your folder should appear in the "Select Destination Folder" area under the "Personal" heading. It should be selected by default at this point but you can click on it to make sure it is selected. To finish saving your saved search "Req-Last 7 Days" click on the blue "Save" button at the bottom of the page.

	Type: Requisitions Date Type: Submit Date	Add to Saved Searches	k r	Requisition Date/Time	Requisition Total
Ê	Date Range: Last 7 days	Step 1: Edit Saved Document Search Details		8/27/2014 2:49 PM	61.27 USD
8	Save Search Export Search	Document Search Nickname	MS	8/27/2014 2:33 PM	152.20 USD
		Req-Last 7 Days		8/27/2014 2:32 PM	1,564.47 USD
	Refine Search Results ?	Add Description	RNER	8 8/27/2014 2:29 PM	7,327.00 USD
<u>ll.</u>	Туре	Step 2: Select Destination Folder			
A	Requisitions -	R New		8/27/2014 2:27 PM	284.78 USD
U [*]	Date Range			8/27/2014 2:26 PM	133.40 USD
•	Last 7 days 🔻	Personal			
	Workflow Status	□ Jimbo My searches		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)	wy searches		8/27/2014 2:14 PM	9.30 USD
	Pending (247)	Shared			
	Withdrawn (20)	Compellent Orders	olff	8/27/2014 2:09 PM	67,698.48 USD
	Rejected (10)	Library Acquisitions	ORD	8/27/2014 2:01 PM	84.24 USD
	Supplier 🌾	Psychology Department			
	Staples (162)		LE	8/27/2014 2:00 PM	85.10 USD
	PURCHASING DEPARTMENT (62)	Save Cancel			
	Dell (36)	T 20 53051242 CA C EAK NUSE & THRUAT SHOLL BAR NOSE and Inroat Specialist U8-27-14 Lisa K Jenkins		8/27/2014 1:58 PM	191.71 USD

15. A congratulatory message should appear to let you know of your success!

6 32	Type Requisitions	Add to Saved Searches		8/27/2014 2:27 PM	284.78 USD
	Date Range	You have successfully saved your search 'Req-Last 7 Days'		8/27/2014 2:26 PM	133.40 USD
•	Last 7 days 💌	_			
	Workflow Status	Close		8/27/2014 2:22 PM	139,406.94 USD
	Completed (629)	<i>ஜ</i> 53652716 🔍 Staples File tabs for Tabitha	TABITHA MARIE	8/27/2014 2:14 PM	9.30 USD

16. Close the message above. To access your new saved search navigate to the main Document Search page by hovering over the "Orders & Documents" icon on the left hand navigation bar. This will open the fly-out menu for "Orders & Documents".





17. Hover over "Document Search" and then select and click "View Saved Searches" on the right-hand side of the "Orders & Documents" menu.

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Þ	Shop > Shopping > Dashboard > Shopping Home > Home/Shop	Diagout
	Orders & Documents	Go
2	Document Search	Browse: suppliers categories contracts chemicals
	Approvals View Saved Searches	[Manage Showcases]
血	Download Export Files	2
2	Contract \$	

18. This will open the "Saved Searches" page and if you select the newly created folder "My searches" you will see the search "Req-Last 7 Days" in the list of searches. Clicking on the search name will run the search and produce the appropriate results.

ñ	OK CORRAL		JAMES MICHAEL GARDNER 🔻	🖈 🛛 Action Items 3	Notifications 📜 57.85 USD 🔍
È	Orders & Documents > Document Search > View Sa	ved Searches 🗢 👌 Document Search			🗂 Logout
1	New Edit Move/Copy Delete (+) expand all (-) collapse all	My searches			
Ø	Personal	Results Per Page 20 -	Total Searches : 1		🔳 Page 1 of 1 🕨
ĭ ■	Jimbo My searches	Req-Last 7 Days			edit move/copy delete
<u> </u>	Shared				edit move/copy delete
4	 Compellent Orders Library Acquisitions 				

19. If you would like for this search to be available from the main "Document Search" page, simply click on the "Add Shortcut" button on the right-hand side of the page.

ñ	DK CORRAL		JAMES MICHAEL GARDNER 🔻	★ 🛛 Action Items 🛐 🗌 No	otifications 📜 57.85 USD 🔍 🔍
	Orders & Documents > Document Search > View Sa	ved Searches 🗢 👌 Document Search			🔁 Logout
	 Kew Edit Move/Copy Delete (+) expand all (-) collapse all 	Searches My searches			
	Personal Jimbo	Results Per Page 20 💌	Total Searches : 1		🖪 Page 1 of 1 🕨
					edit move/copy delete 🔲
Ê	My searches	Req-Last 7 Days		(Add Shortcut Eport Go 🔲
2	Compellent Orders				



20. If you navigate back to the main "Document Search" page (follow Step number 1 of this procedure). You will see your "Saved Searches Shortcuts" at the bottom of the page and you can run your search from there.

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	Ordered State Theory of particle and Apartme	earch) Search Documents 🗢) Document Search	🗂 Logout
1		Search Requisitions Go Enter search terms such as document numbers, suppliers, and product information.	
Ø		Go to - itences source in y requisitions in y parenase order i hav invoices	
血		Saved Searches Shortcuts	
	· · · · · ·	Req-Last 7 Days export	