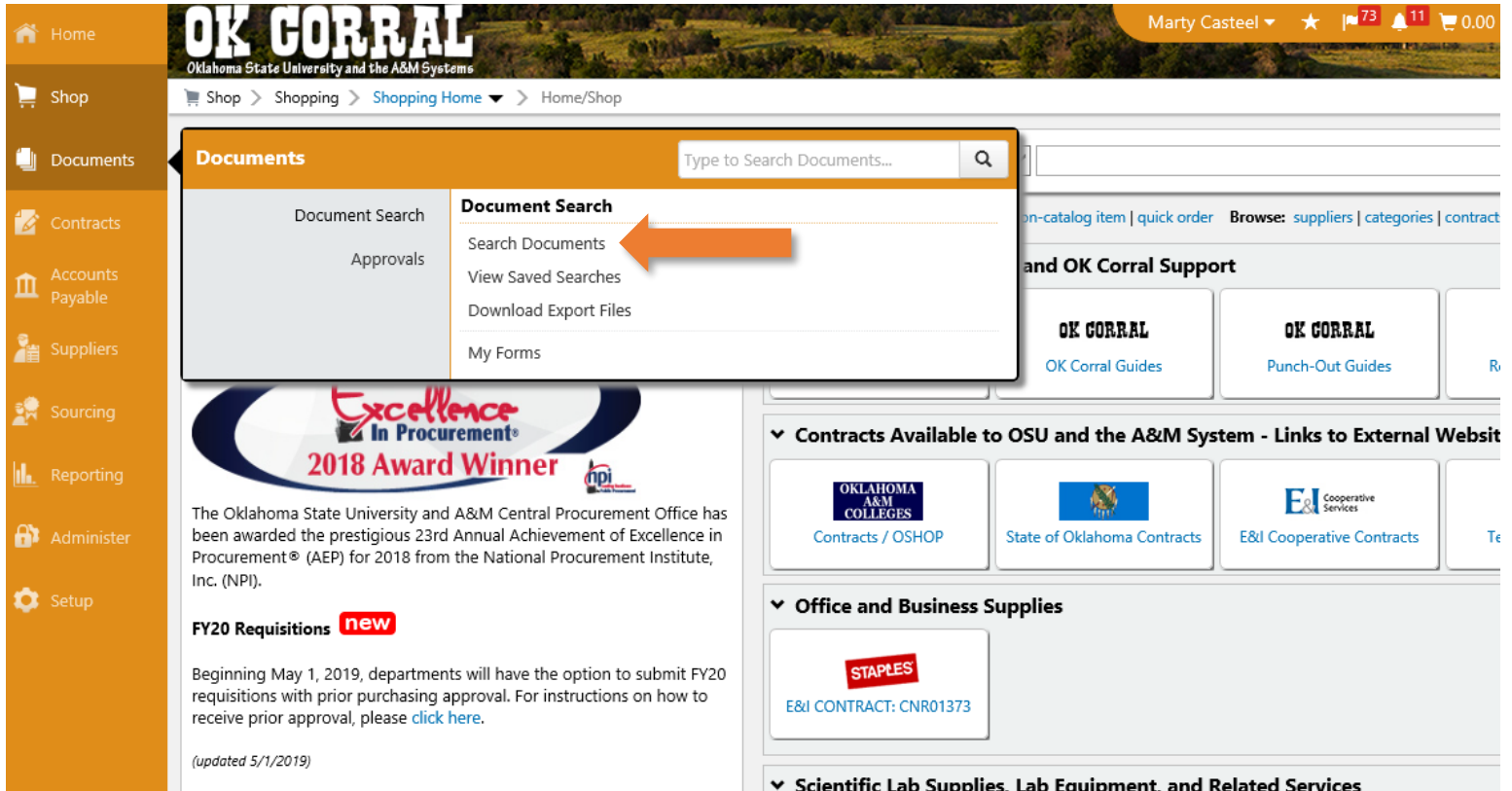


# Document Search Guide

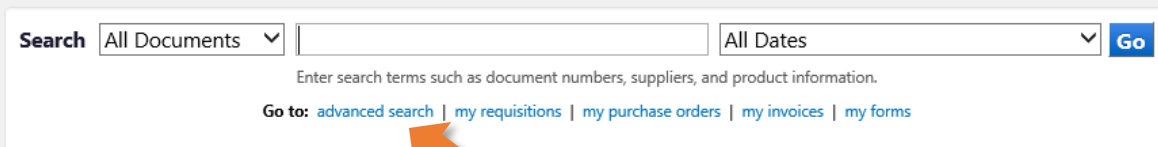
 Documents

1. Hover your mouse pointer over the stack of papers and when the menu pops up click on Search Documents.



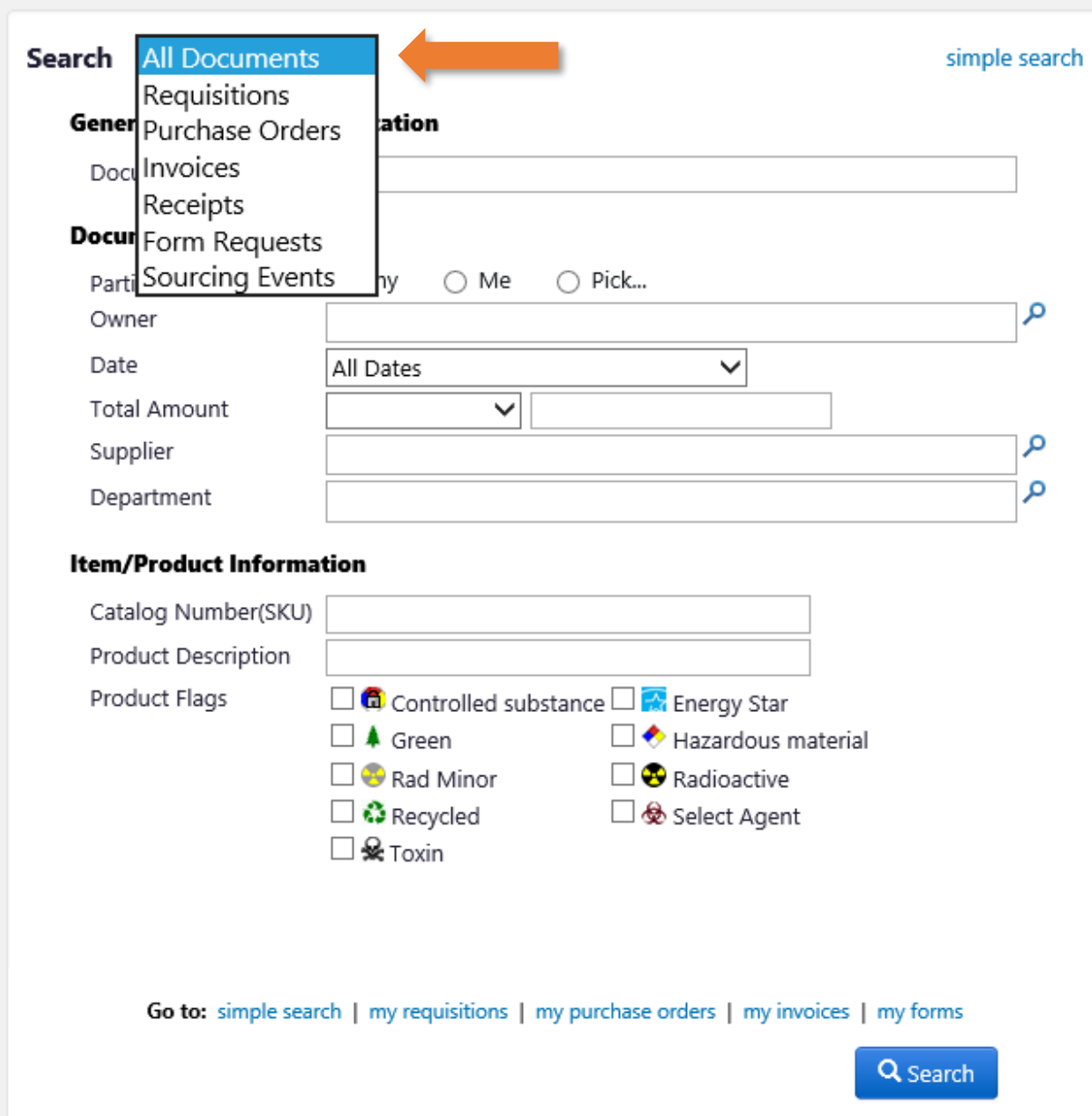
The screenshot shows the OK CORRAL website interface. On the left is a navigation sidebar with links: Home, Shop, Documents, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, Administer, and Setup. The main header features the OK CORRAL logo and a user profile for Marty Casteel. Below the header, a 'Documents' dropdown menu is open, displaying options: Document Search, Approvals, Search Documents (highlighted with an orange arrow), View Saved Searches, Download Export Files, and My Forms. The main content area includes a '2018 Award Winner' banner for Excellence in Procurement, a section for FY20 Requisitions with a 'new' tag, and a sidebar with links to external websites like Oklahoma A&M Colleges, State of Oklahoma Contracts, and Staples.

2. If your Search Documents comes up in “simple search” like below all you must do is click on “advanced search” in the “Go to:” section below the search bar.



The screenshot shows a search bar with a dropdown menu set to 'All Documents' and a search input field. Below the search bar, there is a 'Go to:' section with links: [advanced search](#) (highlighted with an orange arrow), [my requisitions](#), [my purchase orders](#), [my invoices](#), and [my forms](#). The search bar also includes a 'Go' button and a date range dropdown set to 'All Dates'.

3. You can click the drop-down menu next to “Search” to select the documents you would like to search for.



The screenshot shows a search interface with a dropdown menu open next to the "Search" label. The dropdown menu lists the following options: "All Documents" (highlighted in blue), "Requisitions", "Purchase Orders", "Invoices", "Receipts", "Form Requests", and "Sourcing Events". An orange arrow points to the "All Documents" option. The search interface includes several input fields and filters:

- Search:** A dropdown menu with "All Documents" selected.
- simple search:** A link in the top right corner.
- General Information:** A section with various filters:
  - Document Type:** A dropdown menu with "All Documents" selected.
  - Owner:** A text input field.
  - Date:** A dropdown menu with "All Dates" selected.
  - Total Amount:** A dropdown menu with a checkmark icon.
  - Supplier:** A text input field.
  - Department:** A text input field.
- Item/Product Information:** A section with various filters:
  - Catalog Number(SKU):** A text input field.
  - Product Description:** A text input field.
  - Product Flags:** A section with checkboxes for various flags:
    - ☐ Controlled substance
    - ☐ Energy Star
    - ☐ Green
    - ☐ Hazardous material
    - ☐ Rad Minor
    - ☐ Radioactive
    - ☐ Recycled
    - ☐ Select Agent
    - ☐ Toxin

At the bottom, there is a "Go to:" section with links to "simple search", "my requisitions", "my purchase orders", "my invoices", and "my forms". A blue "Search" button is located at the bottom right.

4. Once you select the type of document you would like to search for you can narrow your search by completing any of the information/criteria in any of the fields available. *Note: Please do not run a search without any criteria, this will consume a lot of resources and will take an extremely long time to complete.*

5. Once your search has completed you can apply additional filters from the left hand side of the screen under the “Refine Search Results” section to further narrow your results (a), you can view the information on the screen and click into the individual documents (b), or you can export the information to Excel (c).

Showing 1 - 201 of 201 Results Previous Fiscal Year (7/

Search Details ?

Search Terms

**Participant(s)**

Me (Casteel, Marty)

Filtered by

Type: Purchase Orders

Date Type: Creation Date (System)

Date Range: Previous Fiscal Year

[Save New Search](#) [Export Search](#)

**Refine Search Results**

Type

Purchase Orders

Date Range

Previous Fiscal Year

Workflow Status

Completed (198)

Pending (3)

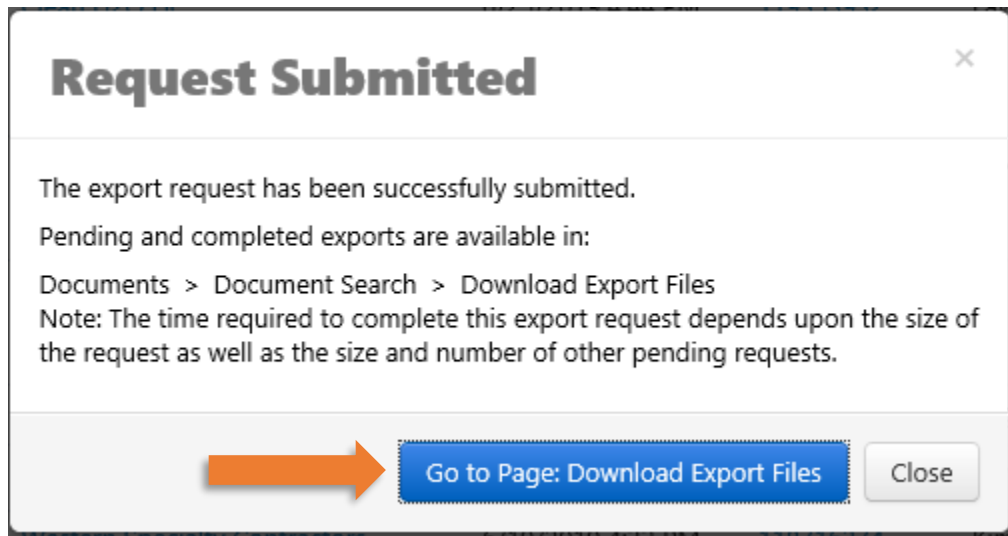
6. If you choose to “Export Search” you will need to name your file (a), choose your “Request Export Template” (b), and click the submit button (c). *Note: In most general cases, unless you need line item details, you will select the “Screen Export”. If you require line item details, you will select the “Full Export”.*

The screenshot shows a dialog box titled "Document Search Export" with a close button (X) in the top right corner. Below the title bar is a section labeled "Request Export (Step 1 of 1)" with a help icon (?). The form contains three main fields: "File Name" with a text input containing "Marty's PO's for FY19" and a clear button (X), "Description" with a text area, and "Request Export Template" with a dropdown menu showing "Screen Export" and a downward arrow. Below the dropdown is the text "System Default Screen Export". At the bottom left is a legend "★ Required". At the bottom right is a blue "Submit" button. Three orange arrows point to specific elements: Arrow A points to the "File Name" input field, Arrow B points to the "Request Export Template" dropdown menu, and Arrow C points to the "Submit" button.

“Request Export Template” drop-down menu.

The screenshot shows the expanded dropdown menu for the "Request Export Template". It lists three options: "Screen Export" (highlighted in blue), "Transaction Export", and "Full Export". Below these is a section header "Shared by Others" followed by two items: "Grants & Contracts monthly report" and "PO screen report w/ campus and bid codes". A "Submit" button is partially visible at the bottom right of the menu.

7. Once you click the submit button you will get the below box and you can click on the “Go to Page: Download Export Files” button to go to the export page.



8. This will take you to the “Download Exports” page. Once the File Name turns blue you can download your report by clicking on the hyperlink. This will download a Zip file with a CVS report in it. You will want to open it and save it as an Excel Workbook so you can use the common Excel functions on the report data.

