Document Search Guide

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

and when

Documents

🎢 Home	OK CORRA Oklahoma State University and the A&M Syst	and a company	AND THE ADA	Marty C	asteel 🔻 🔺 🏿 🗖 🧍 🕅 🕯	0.00
📜 Shop	📜 Shop > Shopping > Shopping H					
실 Documents	Documents	Type to	Search Documents Q	1		
📝 Contracts	Document Search	Document Search		on-catalog item quick order	Browse: suppliers categories	contract
Accounts Payable	Approvals	Search Documents View Saved Searches		and OK Corral Suppo	ort	
Suppliers		Download Export Files My Forms		OK CORRAL	OK CORRAL Punch-Out Guides	R
🙀 Sourcing		ence- remente	✓ Contracts Available to	o OSU and the A&M Sys	stem - Links to External V	Nebsit
IL. Reporting	2018 Award	Winner	OKLAHOMA A&M COLLEGES		E. Cooperative Services	
📅 Administer	been awarded the prestigious 23rc Procurement® (AEP) for 2018 from	A&M Central Procurement Office has Annual Achievement of Excellence in the National Procurement Institute,	COLLEGES Contracts / OSHOP	State of Oklahoma Contracts	E&I Cooperative Contracts	Te
🔅 Setup	Inc. (NPI). FY20 Requisitions		♥ Office and Business S	upplies		
		ts will have the option to submit FY20 approval. For instructions on how to here.	STAPLES E&I CONTRACT: CNR01373			
	(updated 5/1/2019)		✓ Scientific Lab Supplie	s. Lab Equipment. and I	Related Services	

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.

Search All Documents	✓ All Dates ✓ Go									
Enter search terms such as document numbers, suppliers, and product information.										
Go to: advanced search my requisitions my purchase orders my invoices my forms										

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

Gener Purchase Orders Pocur Portes Pocur Form Requests Parti Sourcing Events Parti Sourcing Events Parti Sourcing Events Parti All Dates Total Amount Image: Sourcing Events Supplier Image: Sourcing Events Department Image: Sourcing Events Catalog Number(SKU) Image: Sourcing Events Product Information Image: Sourcing Events Catalog Number(SKU) Image: Sourcing Events Product Flags Image: Controlled substance Image: Sourcing Events Image: Sourcing Events Image: Sourcing Eve	Gener Purchase Orders Docu Invoices Receipts Receipts Parti Sourcing Events Nowner Image: Comparison of the second s	
Docu Invoices Receipts Docu Form Requests Parti Sourcing Events y Me Pick Owner Date All Dates Total Amount Supplier Department Item/Product Information Catalog Number(SKU) Product Description Product Flags © Controlled substance © Radioactive © Radioactive © Recycled	Doci Invoices Receipts Doci Form Requests Parti Sourcing Events ny Me Pick Owner Date All Dates Total Amount Supplier	
Receipts Form Requests Parti Sourcing Events y Me Pick Owner Date All Dates Total Amount Supplier Department Product Information Catalog Number(SKU) Product Description Product Flags © Controlled substance © Rad Minor © Radioactive © Rad Minor © Radioactive © Recycled	Receipts Form Requests Parti Sourcing Events ny Owner Date All Dates Total Amount Supplier	
Docur Form Requests Parti Sourcing Events Ny Me Pick Owner Date All Dates Total Amount Supplier Department Nomber (SKU) Product Information Catalog Number (SKU) Product Description Product Flags © Controlled substance © Rad Minor © Rad Minor © Radioactive © Rad Minor © Rad Minor © Rad Minor © Rad Minor © Select Agent	Docur Form Requests Parti Sourcing Events Ny Me Pick Owner Date All Dates Total Amount Supplier	
Part Sourcing Events hy Me Pick Owner	Parti Sourcing Events hy Me Pick Owner	
Owner Date All Dates Total Amount Supplier Department Department Item/Product Information Catalog Number(SKU) Product Description Product Flags © Controlled substance © Reen • Green • Green • Green • Rad Minor • Recycled	Owner Date All Dates Total Amount Supplier	
Date All Dates Date All Dates Total Amount Image: Control of the second	Date All Dates Total Amount Supplier	0
Total Amount Supplier Department Item/Product Information Catalog Number(SKU) Product Description Product Flags	Total Amount Supplier	
Supplier Department Item/Product Information Catalog Number(SKU) Product Description Product Flags © Controlled substance © Energy Star © Green © Rad Minor © Radioactive © Recycled © Select Agent 	Supplier	
Department Item/Product Information Catalog Number(SKU) Product Description Product Flags		
Item/Product Information Catalog Number(SKU) Product Description Product Flags	Department	2
Item/Product Information Catalog Number(SKU) Product Description Product Flags	•	
Catalog Number(SKU) Product Description Product Flags GControlled substance GCOntrolled substance GCOntrolled substance GCONTOR CONTROLLED CONT		
Product Description Product Flags Green Rad Minor Recycled	Item/Product Information	
Product Flags Controlled substance Energy Star	Catalog Number(SKU)	
□ ▲ Green ◆ Hazardous material □ ● Rad Minor ● Radioactive □ ● Recycled ● Select Agent	Product Description	
□ ▲ Green ◆ Hazardous material □ ● Rad Minor ● Radioactive □ ● Recycled ● Select Agent	Product Flags 🛛 🛱 Controlled substance 🗆 🔂 Energy Star	
🗆 🔹 Recycled 🛛 🗟 Select Agent		
	🗆 😔 Rad Minor 🛛 🗢 😪 Radioactive	
🗆 😪 Toxin		
	🗆 😪 Toxin	
	Go to: simple search my requisitions my purchase orders my invoices my forms	
Go to: simple search my requisitions my purchase orders my invoices my forms		
	Search	
Go to: simple search my requisitions my purchase orders my invoices my forms		

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 2	Pre	Previous Fiscal Year (7/			
Search Details	?	Results Per Page 50	00 🗸	S	ort by: Best matc	h	
		PO No	Supplier	Creation Date/Time	Requisition No.		
Search Terms		✓ P1202169	B pom Llc	6/28/2019 11:52 AM	119532777	E	
Participant(s) Me (Casteel, Marty)		✓ P1201876 🗟 🛙	Elite Electrical Contractors	6/26/2019 11:20 AM	119920638	k	
Filtered by		🗸 P1201874 🗟 🕅	Krueger Intl Inc	6/26/2019 11:16 AM	119676413	J	
Type:Purchase OrdersDate Type:Creation Date (System)		✓ P1201890 🗟 🕅	The Sniffers	6/26/2019 11:11 AM	119930187	ŀ	
Date Range: Previous Fiscal Year Save New Search Export Search		C	Mckee Construction	6/25/2019 4:54 PM	119905254	N	
Refine Search Results		✓ P1202230 🗟 🕅	Clean H2O Llc	6/25/2019 4:44 PM	119353932	L	
Type Purchase Orders	-	✓ P1201551 🗟 🕅	Marion Company Llc	6/24/2019 10:44 AM	119809693	F	
Date Range		✓ P1201281 🔍	Dell inc	6/21/2019 3:14 PM	119778055	N	
Previous Fiscal Year		₽ 95460242 🔍 🖲	L&M Office Furniture Llc	6/21/2019 3:09 PM	118555793	J	
Workflow Status	₩.	✓ P1201138 🔍 🖲	Office Interiors Llc	6/20/2019 10:50 AM	119637775	0	
Completed (198) Pending (3)		✓ P1201042 🗟 🕅	Western Specialty Contractors	6/19/2019 4:32 PM	118716274	k	
a		Corocces 🖻 🕅	1914 Office Fursiture Lle	6/17/2010 AMA DM	110555071	r	

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".*

Document Se	earch Export		×	
Request Export (Step 3	1 of 1)		?	
File Name *	Marty's PO's for FY19	×	А	
Description		~ ~		
Request Export Template	Screen Export		В	
Description	System Default Screen Export			
* Required		Su	bmit	2

"Request Export Template" drop-down menu.

Screen Export
Transaction Export
Full Export
Shared by Others
Grants & Contracts monthly report
PO screen report w/ campus and bid codes

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.

Download Exports Recurring Exports											
											?
Exports with a status of 'Complete' are available to be downloaded. Exports with a status of 'Pending' are currently being queued by the system. The amount of time it takes to generate an export file will vary based on the amount of data being exported.											
If you would like to receive a notification when your export is ready, make sure 'Search Result Export Confirmation' is selected in your Notification Preferences											
E Click to filter exports ?											
Results Per Page 20 V Results found: 1 I Page 1 of 1 1								of 1 📐 📍			
File Name 🔶 🛆	Description		Request Date / Time	•	Expiration Date		Export File Size		Export Status		
Marty's PO's for FY19.zip			8/7/2019 4:50 PM		8/14/2019		8.0 KBytes		Completed		
🗄 Templates ?										Remo	we Selected