

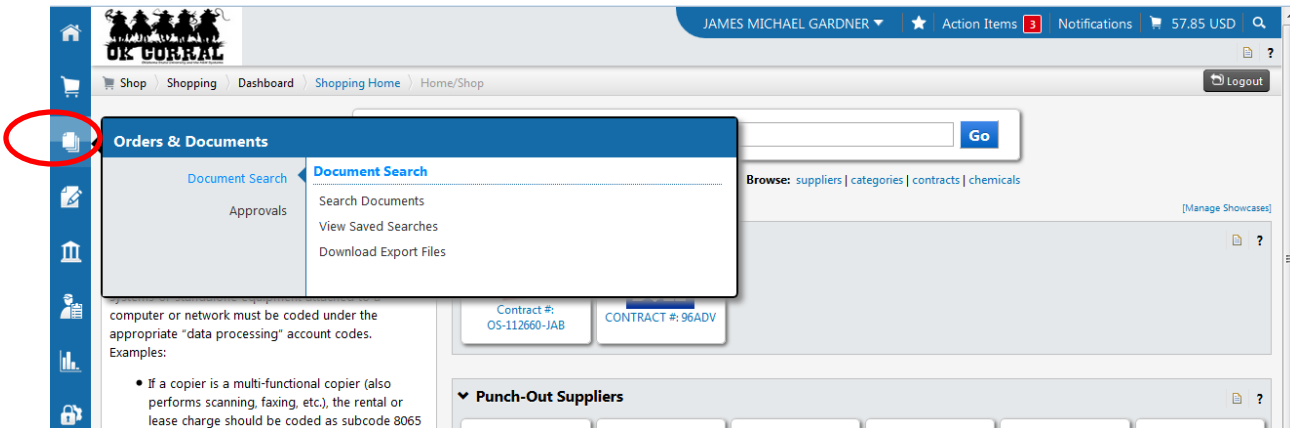
### In This Guide

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

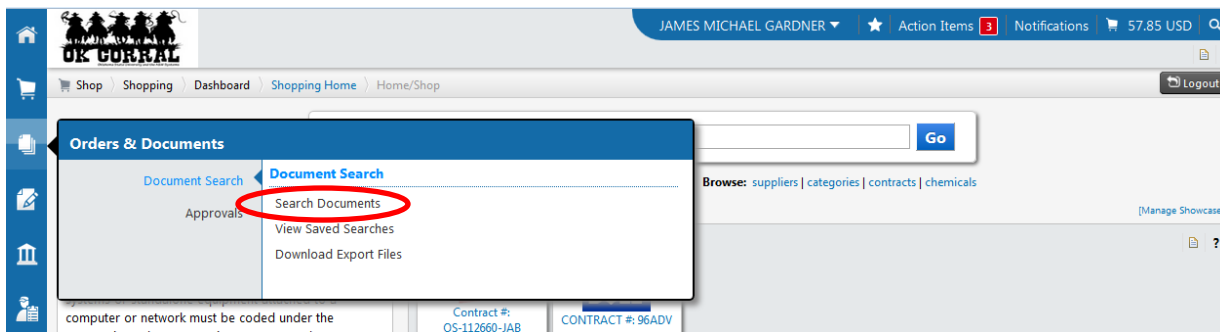
You may find yourself performing the same searches time and again, for instance you might need to check on all activity on a certain account. This procedure will demonstrate how to save your searches so that you can perform them at will without having to enter the criteria each time. It will also demonstrate 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".



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

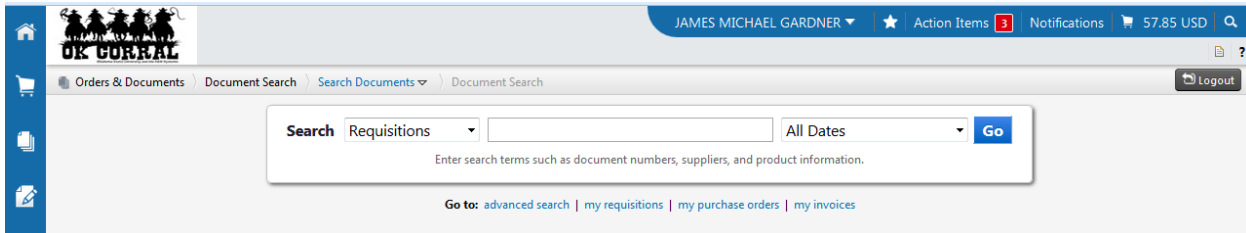


# Step-by-Step Guide

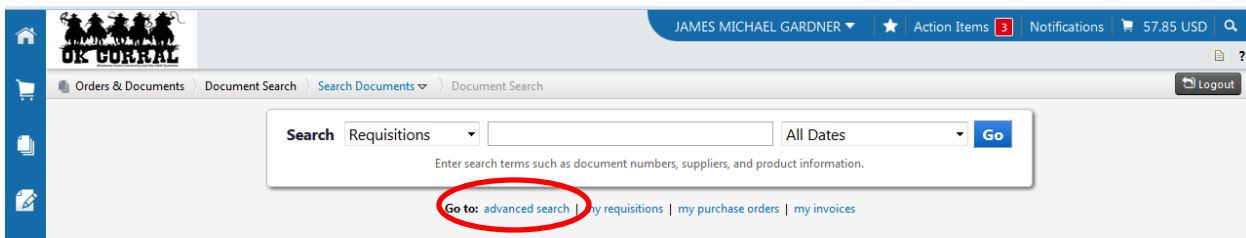
## Creating a Saved Search



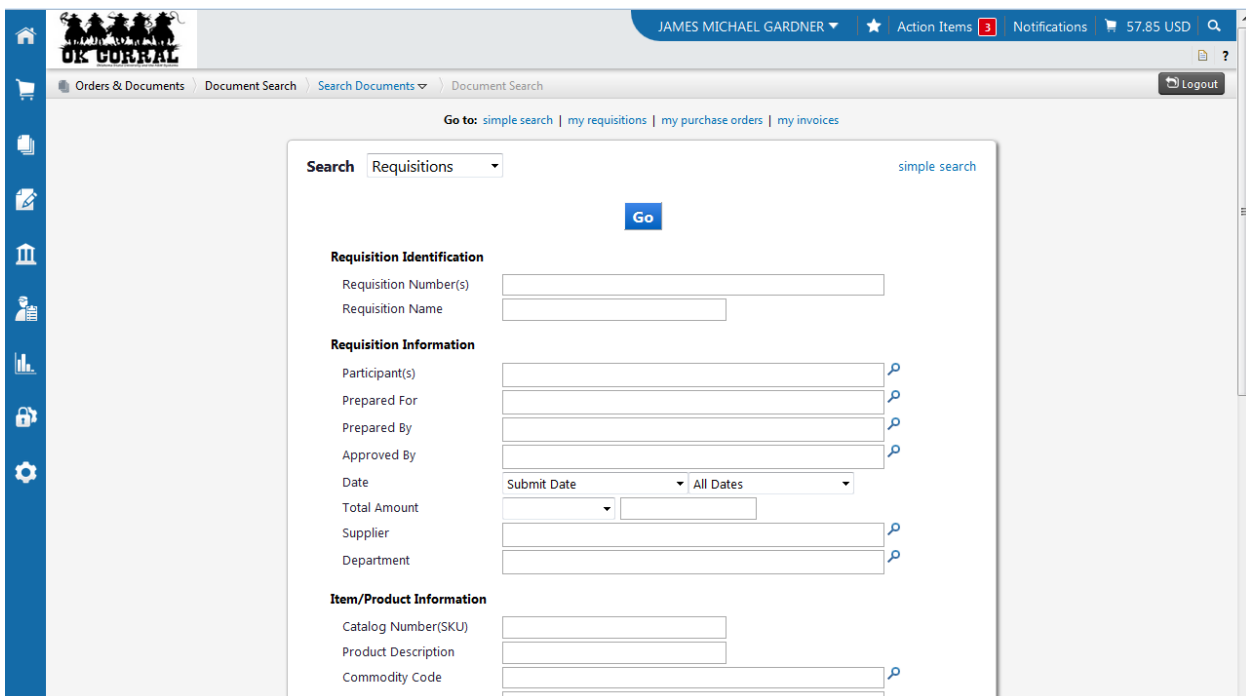
- This will open the "Document Search" main page and it defaults to the "Simple Search" bar that allows you to search documents by entering search terms such as document numbers, suppliers, and product information.



- 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.



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



## Step-by-Step Guide

### Creating a Saved Search



- For our example we're going to look at all requisitions created within the last 7 days. Under the heading "Requisition Information" the 5<sup>th</sup> item is "Date" and there are some options to choose from. We're choosing "Submit Date" and "Last 7 Days".

The screenshot shows the OK Corral web application interface. At the top, there is a navigation bar with the user name "JAMES MICHAEL GARDNER", a star icon, "Action Items" with a red notification badge, "Notifications", and a currency display of "57.85 USD". Below the navigation bar, there is a breadcrumb trail: "Orders & Documents > Document Search > Search Documents > Document Search". A "Logout" button is visible in the top right corner. The main content area has a "Go to:" menu with options: "simple search", "my requisitions", "my purchase orders", and "my invoices". The "simple search" option is selected. Below this, there is a search form with a "Search" dropdown menu set to "Requisitions" and a "Go" button. The form is divided into several sections: "Requisition Identification" with fields for "Requisition Number(s)" and "Requisition Name"; "Requisition Information" with fields for "Participant(s)", "Prepared For", "Prepared By", and "Approved By"; "Date" with a "Submit Date" dropdown menu; "Total Amount" with a dropdown; "Supplier"; "Department"; and "Item/Product Information" with fields for "Catalog Number(SKU)", "Product Description", and "Commodity Code". The "Submit Date" dropdown menu is open, showing options: "All Dates", "All Dates", "Custom Date Range", "Days", "Last 7 days", "Last 30 days", "Last 60 days", "Last 90 days", "Last 120 days", "Yesterday", and "Today". The "Days" option is highlighted in blue, and "Last 7 days" is also highlighted in blue. A red circle is drawn around the "Days" and "Last 7 days" options.

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

This screenshot is similar to the previous one, showing the same search form. However, the "Submit Date" dropdown menu is now closed. The "Go" button, which is a blue square with the word "Go" in white, is now highlighted with a red circle.

- 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.

# Step-by-Step Guide

## Creating a Saved Search



Showing 1 - 200 of 906 Results      Last 7 days (8/21/2014-8/27/2014)

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
53654019	Staples	Jannice, Staples 8-27-14	Jannice Hicks	8/27/2014 2:49 PM	61.27 USD
53654359	Staples	2014-08-27 sew 03	SHARON E WILLIAMS	8/27/2014 2:33 PM	152.20 USD
53653609	GovConnection	2014-08-27 jalivel - Telephony Tester	Jay Lively	8/27/2014 2:32 PM	1,564.47 USD
53653629	DUNHAMS ASPHALT SERVICES INC	2014-08-27 Dunhams Asphalt	CHARYL LYNN TURNER	8/27/2014 2:29 PM	7,327.00 USD
53557895	CDW Government LLC.	2014-08-25 andrew 01(Hobbs)	ANDREW DAVID LOWERY	8/27/2014 2:27 PM	284.78 USD

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

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.

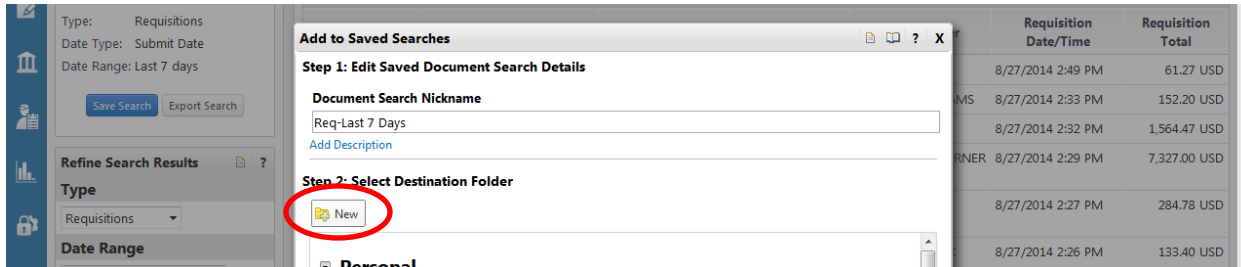
Document Search Nickname: Req-Last 7 Days

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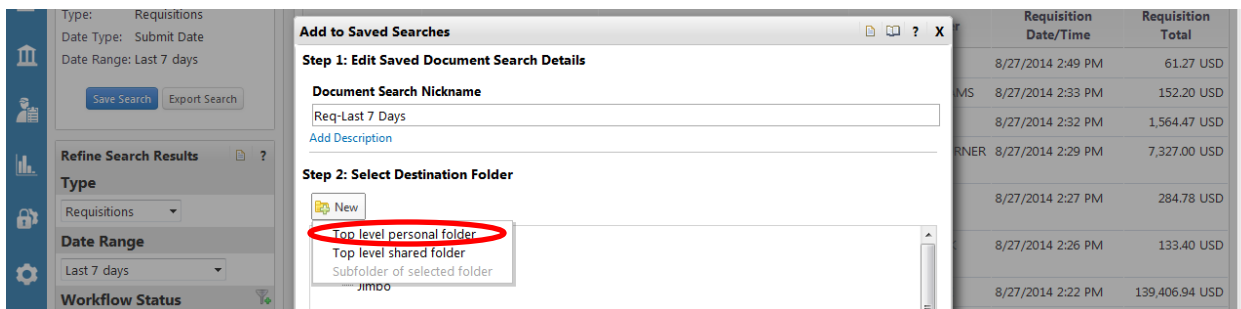
## Creating a Saved Search



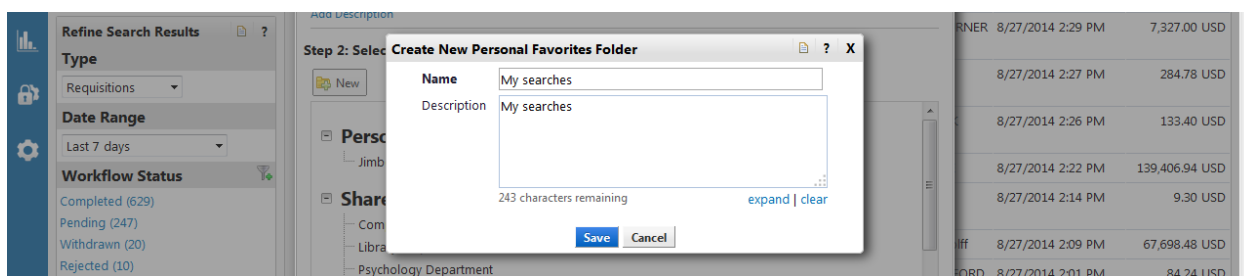
11. If you have already created a folder to keep your saved searches in you can select that at this time. If you need to create a folder you should select the "New" button under the "Step 2: Select Destination Folder" heading.



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".



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.

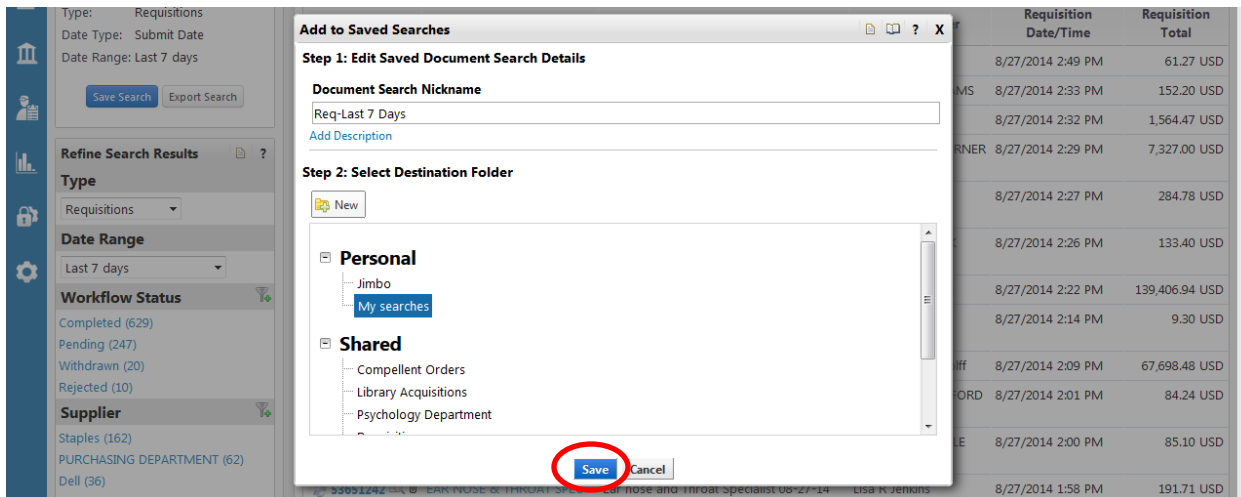


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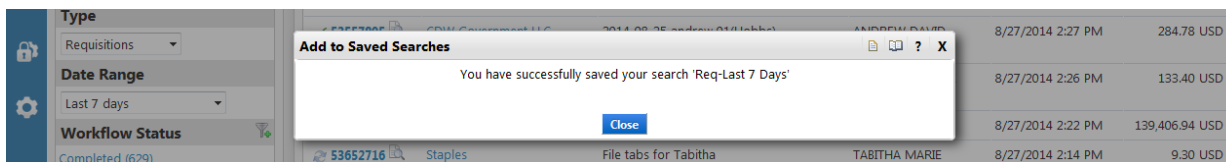
## Creating a Saved Search



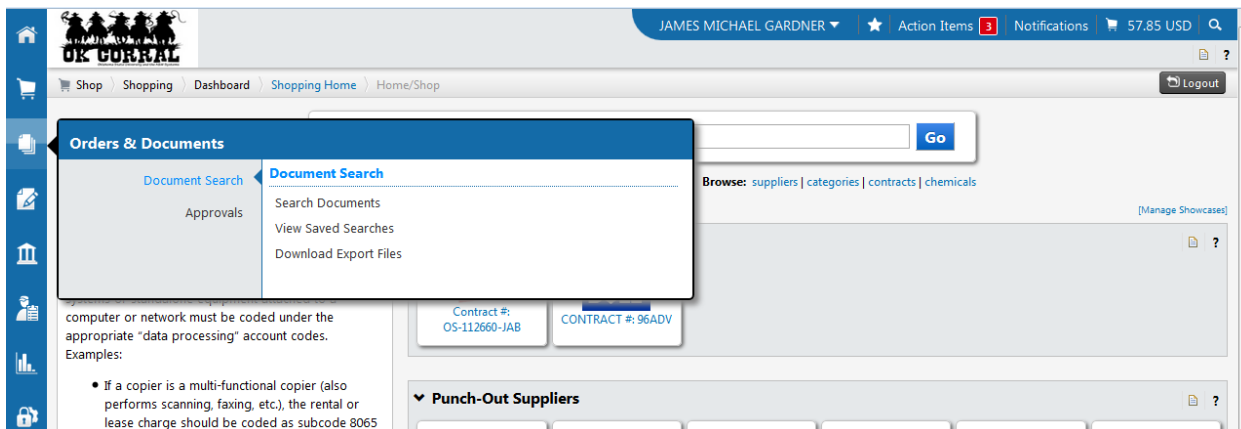
14. Click on the blue "Save" button to save your new folder. Your folder should appear in the "Select Destination Folder" area under the "Personal" heading. It should be selected by default at this point but you can click on it to make sure it is selected. To finish saving your saved search "Req-Last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



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



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".

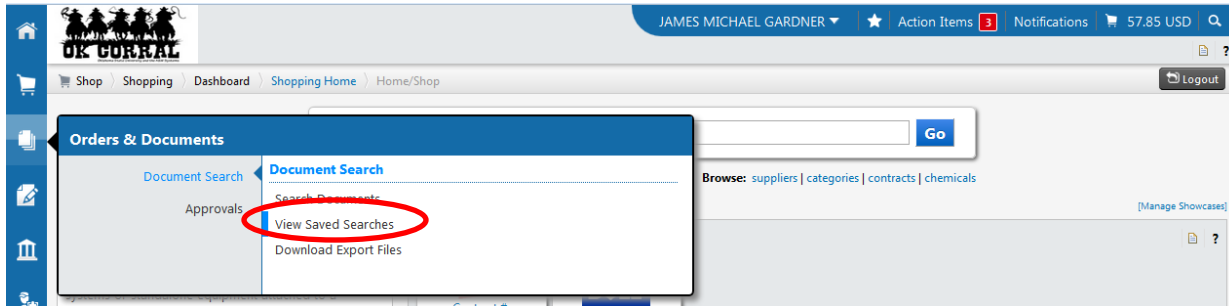


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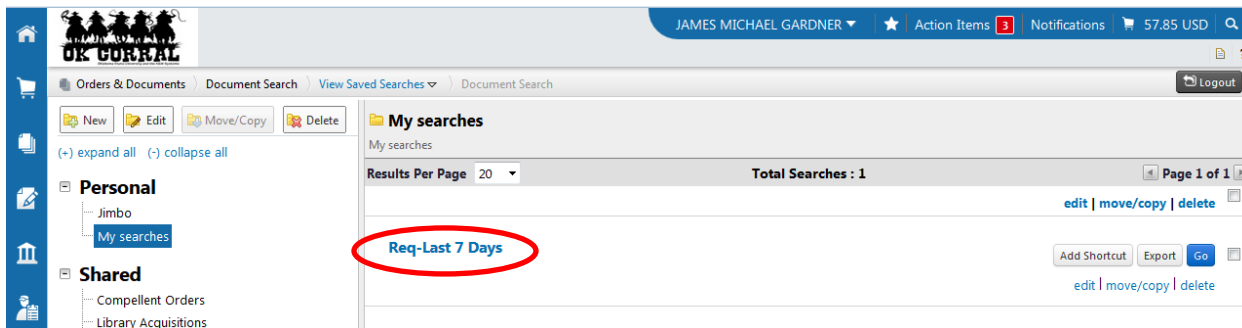
## Creating a Saved Search



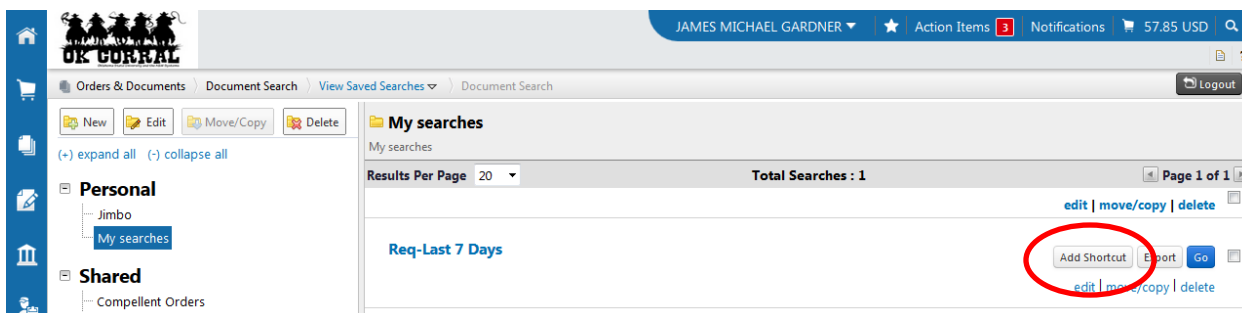
17. Hover over "Document Search" and then select and click "View Saved Searches" on the right-hand side of the "Orders & Documents" menu.



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.



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.



## Step-by-Step Guide

### Creating a Saved Search



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.

