

# Step-by-Step Guide

## Searching for Purchase Orders and Creating Saved Searches



### In This Guide

This guide demonstrates how to search for purchase orders from document search and create “saved” searches.

### Searching for Purchase Orders Procedure

1. Navigate to **my purchase orders** by selecting **document search** ⇨ **my purchase orders** from the navigation bar.

Requisitions display on **my purchase order** page for 90 days. Older transactions can be located by selecting a different **Date Range** within the **Refine Search Results** section.

The screenshot shows the OK Corral system interface. At the top, there is a navigation bar with 'document search' highlighted. Below it, the 'my purchase orders' link is highlighted. The main content area shows search results for purchase orders. The 'Refine Search Results' section is visible, with the 'Date Range' dropdown set to 'Last 90 days'. A table of search results is displayed below.

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total	
E000322	AACC	1/5/2012 9:10 AM	691763	Roger Requestor	Sent	No Matches	100.00 USD	<input type="checkbox"/>
E000317	AACC	12/21/2011 5:50 PM	682366	Roger Requestor	Sent	Receipt-Required No Matches	100.00 USD	<input type="checkbox"/>
E000148	A. Daigger & Co.	11/28/2011 4:50 PM	672514	Roger Requestor	Sent	Receipt-Required Fully Received No Matches	100.00 USD	<input type="checkbox"/>
E000147	A. Daigger & Co.	11/28/2011 4:50 PM	672511	Roger Requestor	Sent	Receipt-Required No Matches	100.00 USD	<input type="checkbox"/>

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### Search Terms

#### Search Type

My Purchase Orders Search

#### Owner

Roger Requestor

### Filtered By

Type: Purchase Orders

Date Range: Last 90 days

[Save Search](#)

[Export Results](#)

With Document Search, post search filters (which display on the left side of the page) are available. The post search filters allow you to define additional criteria for the search results.

For example, if you perform a search for POs, you can narrow your results by a specific department or supplier.

### Refine Search Results ?

#### Date Range

Last 90 days

#### By Department

AAD0320 - FINANCIAL INFORMATION  
MANAGEMENT (4)

#### By Supplier

A. Daigger & Co. (2)

AACC (2)

#### By User

Donna McKee (1)

Roger Requestor (4)

#### By Workflow Step

POSendToERP (1)

#### By Status

Pending (1)

Completed (3)

#### By Supplier Status

Sent To Supplier (4)

#### By Receipt Status

No Receipts (3)

Fully Received (1)

#### By Invoice Status

No Invoices (4)

#### By Matching Status

No Matches (4)

#### By AP Status

Open (4)

#### By Status Flags

Requires Receipts (3)

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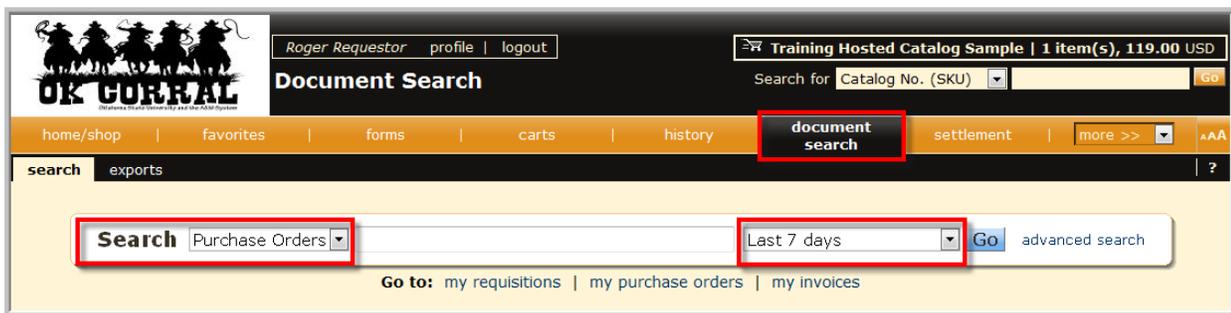
### Creating "Saved" Searches Procedure

Searches can be saved and executed at any time. Saved searches use relevant date information (instead of static dates). For example, if you save a search for all POs for the last 7 days, it will show exactly that, no matter what date it is executed.

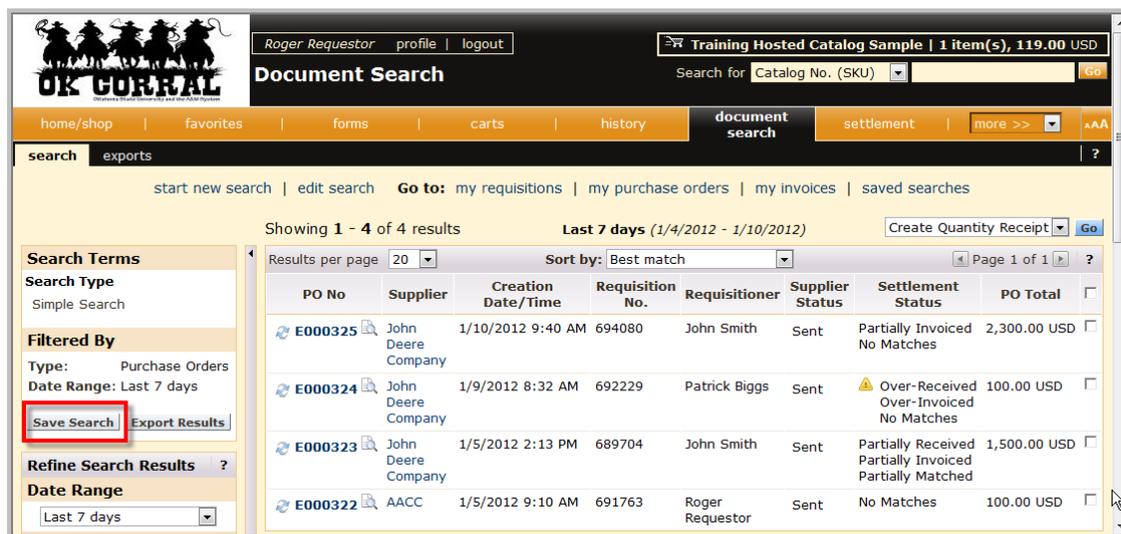
Saved searches are accessed through the Document Search tab, and are saved by name and description. Note: Currently, searches are only saved on a "per user" basis and cannot be shared or saved globally.

### Procedure

1. Navigate to **document search** by selecting **document search** from the navigation bar.
2. Select **Purchase Orders** as your document type and **Last 7 days** as your date range.
3. Click the **Go** button.



4. In the **Filtered By** section (located on the left side of the page), select the desired filters. For example, select a specific **Department**.
5. Click the **Save Search** button to save your search criteria.



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- In the **Save Search Results** popup window, enter the search **Name** and **Description**. These are fields which can be used to reference the search later.
- Click the **Save** button.

**Save Search Results** ? X

Name: My department PO's for last 7 days

Description: [Empty text area]

expand | clear

Save Cancel

- Click the **Close** button to close the query confirmation window.

**Save Search Results** ? X

Query has been saved successfully

Close

- The search can now be accessed easily from the **saved searches** link.

OK CORRAL

Roger Requestor profile | logout

Training Hosted Catalog Sample | 1 item(s), 119.00 USD

Document Search

Search for: Catalog No. (SKU) [ ] Go

home/shop | favorites | forms | carts | history | document search | settlement | more >> | AA

search | exports

start new search | edit search | Go to: my requisitions | my purchase orders | my invoices | **saved searches** ←

Showing 1 - 4 of 4 results | Last 7 days (1/4/2012 - 1/10/2012) | Create Quantity Receipt | Go

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status	PO Total
E000325	John Deere	1/10/2012 9:40 AM	694080	John Smith	Sent	Partially Invoiced No Matches	2,300.00 USD

*You have successfully searched for purchase orders and created a saved search.*