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Reference

Guide

Using Document Search

AYC

In This Guide

- ✓ Getting results with document search
- ✓ Filtering document search results
- ✓ Exporting search results✓ Saving searches

Procedure

1. Hover over the Orders tab, then hover over Search, click All Orders.

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	Simple Advanced			Go to: Favori	tes Forms Quick Order	Browse: Suppliers Ca	ategories Contracts
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32	Approvals	Purchase Orders					
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2. All orders are displayed. Clicking the arrow within the column results in sorting the list in ascending/descending order per that column.

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VWR International 1 Staples		3363249	Requisition	Pending	Patrick Defourneaux		10/19/2021 8:51:48 AM		 Office Depot ⁽³⁾ VWR International 	3,534.22 USD
Crder Owners	~ □	NO022006	Purchase Order	Complete	Patrick Defourneaux		10/18/2021 3:35:47 PM	10/18/20 3:36:31	21 Office Depot 🛛	325.40 USD
Defourneaux, Patrick 15 Walker, Kyle 13		3362001	Requisition	Complete	Patrick Defourneaux		10/18/2021 2:25:17 PM	10/18/20 3:35:47	21 Office Depot ⁽³⁾ PM	325.40 USD
Gonzales, Michele		N0022005	Purchase Order	Complete	Patrick Defourneaux	9/13/202	21 3:20:26 PM	9/13/2021 3:21:11	PM W.W. Grainger, Inc.	170.92 USD
Approved By	~ □	3337739	Requisition	Complete	Patrick Defourneaux	9/13/202	21 1:53:09 PM	9/13/2021 3:20:27	PM W.W. Grainger, Inc.	170.92 USD
Commodity Code	~ □	N0022004	Purchase Order	Complete	Patrick Defourneaux	9/13/202	21 1:47:50 PM	9/13/2021 1:48:51	PM W.W. Grainger, Inc.	85.46 USD

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. Clicl	king Type of Order c	and selecting either Purc	chase Order or R	equisition can	narrow the	search.	
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ы.	VWR International	(App) Called	complete Patrick	10/18/2021 3:35:47 PM	10/18/2021	Office Depot 😉	325.40 USD
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4. Clicking Created Date gives the option to narrow the search by dates.

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67	Order Owners V	N0022005	Purcha Order	Defourneaux	Apply Cancel	3:21:11 PM	W.W. Grainger, Inc. 🕑	170.92 USD

5. Clicking Add Filter opens a list of filters that can be selected to narrow the search.

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	C Show More	N002200	3 Purcha	ase Complete	Patrick	9/13/2021 1:40:47 PM	9/13/2021 1:45	Participant	00.40	-030

6. In this example, Supplier was chosen. Select the desired Supplier from the list. Click Apply.

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	Gonzales, Michele 3		complete Patrick	9/13/2021 1:47:50 PM	9/13/2021 1:48:51 PM	W.W. Grainger, Inc.	85.46 USD	
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7. Click **Save Changes** to save the search with the selected filters for future use.

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յու	C Show More		N0021983	Purchase Order	Complete	Kyle Walker	6/22/2021 3:59:	:11 PM 6/22/202	1 3:59:51 PM	Office Depot	504.37 USD
a 7	Commodity Code 🗸 🗸		N0021975	Purchase Order	Complete	Denise Youngblood Patrick Defourneaux	6/21/2021 10:47:	:54 AM 6/21/2021	10:48:25 AM	Office Depot 😉	522.49 USD
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	42507 (Chairs Wood)										

8. Type a name for the search and click **Save**.

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9. A shortcut is created listed under My Searches for the saved search with filters.

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10. The search can be exported to Excel by clicking **Export All**. Click **Submit** in the pop-up window.

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8	39341 (Coffee, Whole Bean and Ground)									

11. Click Manage Search Exports

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	39341 (Coffee, Whole														

12. Click **Export request for All Orders** to download the Excel spreadsheet.

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