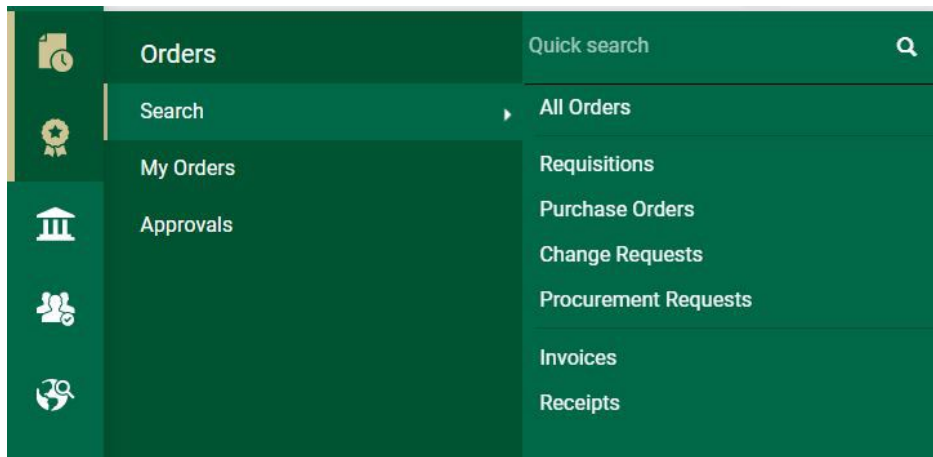
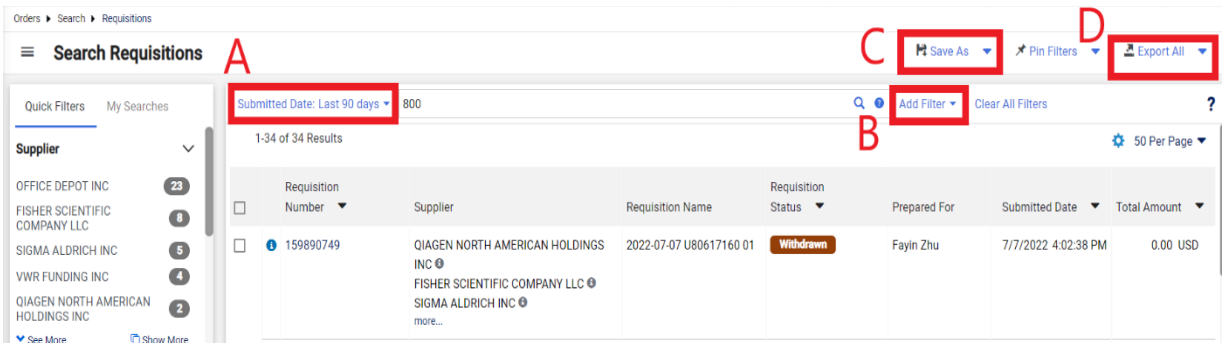


<b>Purpose:</b>	To define procedures for Searching Documents (I.E. Requisitions, Purchase Orders, Forms, and Invoices)
<b>Navigation:</b>	Documents > Search Documents
<b>Notes:</b>	There are multiple ways to search and export results, this guide will give you a single straightforward way.

1. Clicking the **ORDERS** icon on the Left Hand menu to open the fly out menu. If you know the document number you can simply type it into the quick search bar at the top of the fly out. Or, for more detailed search and filter options you can select the document type you are searching for from the list.



2. Most detailed search pages will look the same. In the search bar at the top, you can enter ANY information that is typed into a field on that type of document such as: Supplier name, date, prepared for, document number etc.



Orders > Search > Requisitions

**Search Requisitions**

Quick Filters My Searches Submitted Date: Last 90 days 800 Add Filter Clear All Filters ?

1-34 of 34 Results 50 Per Page

Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
159890749	QIAGEN NORTH AMERICAN HOLDINGS INC FISHER SCIENTIFIC COMPANY LLC SIGMA ALDRICH INC more...	2022-07-07 U80617160 01	Withdrawn	Fayin Zhu	7/7/2022 4:02:38 PM	0.00 USD

- A) By Default the system returns results from the last 90 days, but you can customize the date range
- B) Filter by other criteria using the drop down menu.
- C) Save your search if it's something you routinely use
- D) Export your search results to edit them in Excel.

3. **Note on Filters.** You can filter either by the drop down menu at the top, or by using the Quick filters on the left hand side.

The screenshot displays a procurement system interface with two main components: a filter sidebar on the left and a main list of requisitions on the right.

**Filter Sidebar (Left):**

- Buttons: [Add Filter](#) (dropdown), [Clear All Filters](#)
- Search:
- Identifiers**
  - Change Request No.
  - Contract Number
  - Ext. Requisition Number
  - PO Number
  - Requisition Name
  - Requisition Number
- Dates**
  - Accounting Date
  - Approved Date
  - Completed Date

**Main List (Right):**

Quick Filters | My Searches

**Supplier** (dropdown arrow)

- OFFICE DEPOT INC (23)
- FISHER SCIENTIFIC COMPANY LLC (8)
- SIGMA ALDRICH INC (5)
- VWR FUNDING INC (4)
- QIAGEN NORTH AMERICAN HOLDINGS INC (2)
- [See More](#) | [Show More](#)

**Requisition Status** (dropdown arrow)

- Completed (31)
- Withdrawn (2)
- Pending (1)
- [Show More](#)

**Prepared For** (dropdown arrow)

- Kennedy, Sandra (2)
- Reese, Diana (2)

4. Note on **Saving a Search**: select the Save As function, Click "Save As".
  - a. A pop up will open and ask you to Nickname your search.
  - b. Add a search description to let you know what filters you have applied
  - c. In step 2 you must set a destination folder, go to Add New and Create a **TOP LEVEL PERSONAL FOLDER**
  - d. Name your personal folder and save
  - e. The next time you need to run the same search you can use the My Searches tab and select the search shortcut. The search Nickname will be at the top of your results

**Save Search** [Close]

**Step 1: Details**

Nickname \*

Hide Description

500 characters remaining

**Step 2: Select Folder Destination**

- Personal
  - Contract Requests
  - Working Contracts
- Shared
  - Contract Renewals in Draft

[Add New]
 

- Top level personal folder
- Top level shared folder
- Subfolder of selected folder

[Save] [Close]

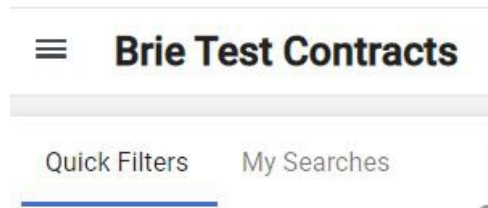
FLORIDA PUBLIC SERVICE INC

FLORIDA PUBLIC SERVICE INC

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OFFICE DEPOT IN

UCF RESEARCH F



5. **Note on Exports:** Selecting the Export option will open a pop out and allow you to make notes about your export request. You can also choose the Type.
  - a. Screen Layout will give you the column that you see on your search results screen
  - b. Full Export will give you multiple files related to the documents in a zip folder.

When you Submit, another screen will pop up that will take you to your downloaded file. Note depending on the number of records it takes minutes to hours to return results. Keep refreshing the screen.

You can download or delete exports that are no longer required. This will not affect the actual documents in the system.



### Manage Exports

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
Export request for Requisition	Completed	Requisition	Screen Layout (Excel)	7/28/2022 4:42:08 PM	7/28/2022 4:42:12 PM	8/4/2022	Total Records: 34	Delete
Export request for Purchase Order	Completed	Purchase Order	Full Export (CSV)	7/22/2022 1:55:16 PM	7/22/2022 1:55:19 PM	7/29/2022	Total Records: 1	Delete
Export request for Requisition	Completed	Requisition	Full Export (CSV)	7/22/2022 1:52:52 PM	7/22/2022 1:52:55 PM	7/29/2022	Total Records: 1	Delete
Export request for Procurement Requests	Completed	Procurement Requests	Full Export (CSV)	7/22/2022 1:51:30 PM	7/22/2022 1:51:34 PM	7/29/2022	Total Records: 1	Delete