


## ADVANCED SEARCH OPTIONS

The advanced search options on the Document Search menu  provides several options for searching for documents.

- Click **advanced search** on the Document Search page to view the available Advanced Search options.
- The “All Documents” view has limited options. Choose a specific document type from the drop-down to view all available options.
- Based on the document that you choose, you will have different fields available to search on.
- Most fields allow for more than one entry, so you can include multiple values in a search.
- Use the “Is Exactly”, “Starts With” or “Is Between” drop-down in the Custom Fields section to view a single value or range of values.

## VIEWING DOCUMENTS SUBMITTED BY A REQUESTOR

To view Requisitions/Purchase Orders submitted by a Requestor, use the **Prepared by** field.

1. Choose either **Requisition** or **Purchase Order** from the drop-down field.
2. Enter part of the name in the **Prepared by** field. Matches will display. Click on the one you wish to view. Click **Go**.

## VIEWING REQUISITIONS ACTED UPON BY A PERSON

To view Requisitions that were acted on by a person, either as a Shopper, Requestor and/or Approver, use the **Participant(s)** field.

1. Choose **Requisition** from the drop-down field.
2. Enter part of the name in the **Participant(s)** field. Matches will display. Click on the one you wish to view. Click **Go**.

## SAVING A SEARCH

If you perform a search often, you can save your search so you do not have to enter your criteria every time.

1. After entering your search criteria and generating your search, click **Save Search** on the left side in the **Filtered By** section.

# Document Search Quick Guide

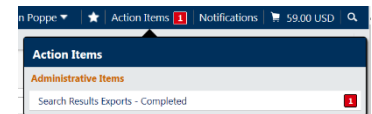
2. Give the Search a nickname.
3. Choose which folder you wish to store your search in. If you do not have any folders listed, click **New** and create a folder. Click **Save**.
4. To access your saved searches, click the **View Saved Searches** link.
5. You can choose to Edit, Move/Copy or Delete any of your saved searches. If you edit a saved search and then save it again, it will act like a “Save As” and save both versions of the search. You may have to delete the original one if you don’t want to keep it.
6. To add a shortcut to the document search tab, click **Add Shortcut** beside the search you wish to create a shortcut for.
7. Your search will now show at the bottom of the **document search** tab.



## EXPORTING SEARCH RESULTS TO EXCEL

1. After generating the search, click **export**.
2. Enter a name for the file and choose your **Export Type**:
  - **Screen Export** – exports only the columns shown in the search result.
  - **Transaction Export** – provides detailed line item information on the documents.
  - **Full Export** (available only for PRs and POs) – Produces four files with much more data than the other two options.

3. Click **Submit Request**. You will receive a message that your request has been submitted. If you have enabled the Email Preference, you should receive a notification once the export is complete. You will also be notified via the Action Items at the top of the eSHOP page.



4. To view the export, click the Orders & Documents menu and select **Download Export Files**.
5. Click the file name and choose to **Open** or **Save** the .zip file.
6. Open the **filename.csv** file to view the results.

