

## In This Guide

This guide explains how you can search for all types of documents within **CrimsonCorner**, save the searches and export the results.

This guide discusses:

- ✓ Searching for documents
- ✓ Saving searches

- ✓Advanced search
- ✓ Exporting search results

## Procedure

1. Begin by accessing Document Search from the main navigation menu by selecting Orders &

Documents » Document	: Search » Search	Documents.
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Ì	Orders & Documents      Document Search      Search Documents      Document Search	
	Orders & Documents	ase C
<b>1</b>	Document Search Search Documents	
1	View Saved Searches Download Export Files	

2. Use the All Documents dropdown menu to specify whether you want to search all documents or narrow your search to particular types of documents like requisitions, purchase orders, invoices or receipts.

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۱ <u>ب</u>	Orders & Documents Document Searcher .	ch 👌 Search D	Documents 🗢 🍐 Document	Search
		Search	All Documents  All Documents Ch te Requisition	All Dates • Go
☑			Purchase Order Invoice Receipt	nc d search   my requisitions   my purchase orders   my invoices



3. Use the All Dates dropdown menu to search across all date ranges or a particular time period like the last 7 days, month-to-date or last month.

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1	Orders & Documents      Document Search      Search Documents      Document Search	
	Search All Documents - Enter search terms such as document numbers, supplier	rs, and prc All Dates Coordinates
	Go to: advanced search   my requisitions   my purc	Last 7 days
血		Last 30 days Last 60 days Last 90 days
		Last 120 days Yesterday
		Today Last Week
		This Week Calendar
		Month-To-Date Last Month Year-To-Date

- 4. Type in the Search field the information that you have about the particular document.
- 5. Once you have made your selections, click **Go** and you will be taken to the search results page.

) Shop ) My Carts and Orders ) View	My Orders (Last 90 Days) 🗢	> Document Search				
start new search						
	Showing <b>1</b> - <b>5</b> of 5	results	Last 90 days (7/21/2013-1	0/18/2013)		
Search Terms	Results per page 50	0 •	Sort by: Best match	•		💶 Page 1 of 1 🕨
Shopper	Requisition No.	Supplier(s)	<b>Requisition Name</b>	Requester	Requisition Date/Time	Requisition Total
Ryan Requester1	← 1045550 🗟	MICROSCOPE.COM	Microscope	Ryan Requester1	10/16/2013 10:40 AM	0.00 US
Filtered By	<i>2</i> 1034084 🗟 🕅	MICROSCOPE.COM	2013-09-18 requester1 02	Ryan Requester1	9/18/2013 11:31 AM	700.00 US
Type: Requisition	← 1034006 🖎	MICROSCOPE.COM	Microscope	Ryan Requester1	9/18/2013 10:39 AM	0.00 US
Date Range: Last 90 days	<i>≳</i> 1021164 🔍 🛙	NORMAN STAMP AND SEAL CO	name tags	Ryan Requester1	8/21/2013 10:55 AM	15.00 US
Save Search Export Search	← 1021062 🕰	MICROSCOPE.COM	Microscope	Ryan Requester1	8/21/2013 10:26 AM	0.00 US
Refine Search Results ?						
Date Range						
Last 50 days						
Current Workflow Step						
Department Financial Approval (2)						
Account Asset ID						
Asset Profile						

6. The left side of the page will show you your filter options and the right side of the page will show you the documents that were returned for your search.



7. You can choose to narrow down your results even further by selecting other filter options on the left side of the page.

📜 Shop 👌 My Carts and Orders 👌 View My	Orders (Last 90 Days) 🗢	Document Search				
start new search						
	Showing <b>1</b> - <b>5</b> of 5	results	Last 90 days (7/21/2013-1	0/18/2013)		
Search Terms	Results per page 500	•	Sort by: Best match	•		Page 1 of 1 膨 💡
snopper	Requisition No.	Supplier(s)	<b>Requisition Name</b>	Requester	Requisition Date/Time	<b>Requisition Total</b>
Ryan Requester1	<b>←</b> 1045550 🗟	MICROSCOPE.COM	Microscope	Ryan Requester1	10/16/2013 10:40 AM	0.00 USD
Filtered By	<i>2</i> 1034084 🗟 🕅	MICROSCOPE.COM	2013-09-18 requester1 02	Ryan Requester1	9/18/2013 11:31 AM	700.00 USD
Type: Requisition	<b>←</b> 1034006 🖄	MICROSCOPE.COM	Microscope	Ryan Requester1	9/18/2013 10:39 AM	0.00 USD
Date Range: Last 90 days	<i>2</i> 1021164 🖻 🕅	NORMAN STAMP AND SEAL CO	name tags	Ryan Requester1	8/21/2013 10:55 AM	15.00 USD
Save Search Export Search	← 1021062 🖻	MICROSCOPE.COM	Microscope	Ryan Requester1	8/21/2013 10:26 AM	0.00 USD
Refine Search Results ?						
Date Range						
Last 90 days						
Current Workflow Step						
Current Workflow Step Department Financial Approval (2) Custom Fields						

8. To access the document in question, click on the document number.

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) Shop $\rangle$ My Carts and Orders $\rangle$ View	My Orders (Last 90 Days) 😎	> Document Search	
start new search			
	Showing <b>1</b> - <b>5</b> of 5	results	Last 90 days (7/21/2013-1
Search Terms	Results per page 50	0 -	Sort by: Best match
Shopper	Requisition No.	Supplier(s)	<b>Requisition Name</b>
Ryan Requester1	<u>+ 1045550</u>	MICROSCOPE.COM	Microscope
Filtered By	2 1034084 🔍 🕅	MICROSCOPE.COM	2013-09-18 requester1 02
Type: Requisition	← 1034006	MICROSCOPE.COM	Microscope
Date Range: Last 90 days	<i>≷</i> 1021164 🗟 🕅	NORMAN STAMP AND SEAL CO	name tags
Save Search Export Search	← 1021062 🔍	MICROSCOPE.COM	Microscope

- 9. You can also easily access your recent requisitions, purchase orders and invoices by using the hyperlinks on the main **Document Search** page.
- 10. From **Document Search**, navigate to the **Go To** section under the main searching toolbar.



11. By clicking on the **My Requisitions, My Purchase Orders** or **My Invoices** hyperlinks, you will

quickly be taken to the search results page showing you those types of documents from the last 90 days with the newest document on top.

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È	${\color{black}\textcircled{\sc l}}$ Orders & Documents $$ $$ Document Search $$	Search D	Documents ▼	<ul> <li>Document Search</li> </ul>		
<u></u>	:	Search	Purchas	E Order	All Dates	Go
- D	_			Go to: advanced search   my requisitions   n	ny purchase orders   my invoices	

- 12. From **Document Search**, there is another hyperlink in the **Go To** section under the main searching toolbar called **Advanced Search**.
- 13. This search option will allow you to search by more specific criteria like the shopper who initiated the order, the supplier, the total amount or the department number charged.

Go to: simple search   my requisitions   my purchase orders   my invoices						
Search	Purchase Order			simple searc		
Purch	nase Order Identificatio	Go				
Pure	chase Order Number(s)					
Purch	ase Order Information	,				
Part	icipant(s)			م		
Ow	ner			م		
Req	uester			م		
Арр	roved By			م		
Date	e	Creation Date (System)	<ul> <li>All Dates</li> </ul>	-		
Tota	al Amount	•				
Sup	plier			م		
Dep	artment			م		
Item/	Product Information					
Cata	alog Number(SKU)					
	duct Description					
Con	nmodity Code	C		م		
For	m Name					
For	m Type			م		
Pro	duct Flags	🔲 🛱 Controlled substar	ce 🔲 🔜 Energy Star			
		🔲 🔺 Green	🔲 🔶 Hazardous materia	l		
		🔲 🥌 Rad Minor	Radioactive			
		Recycled Secycled	🔲 🚸 Select Agent			

- 14. For searches that you use frequently, you can choose to save those searches.
- 15. To begin, run your search. When the results are displayed, choose Save Search.



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	📜 Shop $\langle  angle$ My Carts and Orders $\langle  angle$ View My Orders	(Last 90 Days) 🗢 👌 Document	Search
	start new search		
		Showing <b>1 - 5</b> of 5 res	sults
1	Search Terms	Results per page 500 •	
~	Shopper	Requisition No.	Supplier(s)
<b>A</b>	Ryan Requester1	← 1045550 🗟	MICROSCOPE.COM
Ē	Filtered By	≈ 1034084 🗟 🎚	MICROSCOPE.COM
	Type: Requisition	← 1034006 🗟	MICROSCOPE.COM
	Date Range: Last 90 days	≈ 1021164 🗟 🕅	NORMAN STAMP AND SEAL CO
	Save Search Export Search	← 1021062 🔍	MICROSCOPE.COM

16. A popup box will appear that will allow you to enter in a nickname for your search.

s	Add to Saved Searches
۲e	Step 1: Edit Saved Document Search Details
04	Document Search Nickname
0:	Purchasing Requisitions
0	
0:	Step 2: Select Destination Folder
0:	Rew New
	<ul> <li>Personal         <ul> <li>Financial Services Requisitions</li> </ul> </li> <li>Shared         <ul> <li>No shared folder available</li> </ul> </li> </ul>
	Save Cancel

17. You can choose to save this search in a new folder or an existing folder. To create a new folder,

click the **New** button and choose **Top level personal folder**.

		?	x
ep 1: Edit Saved Document Search Details			
ocument Search Nickname			
urchasing Requisitions			
dd Description			
ep 2: Select Destination Folder			
3 New			
Top level personal folder Subfolder of selected folder			
Financial Services Requisitions			
Shared			
No shared folder available			
Save Cancel			
	bocument Search Nickname  turchasing Requisitions  dd Description  ap 2: Select Destination Folder  Top level personal folder  Subfolder of selected folder  Financial Services Requisitions  Shared No shared folder available	bocument Search Nickname  turchasing Requisitions  dd Description  ap 2: Select Destination Folder  be P: Select Destination Folder  be P: Subfolder of selected folder  be Financial Services Requisitions  Shared be No shared folder available	bocument Search Nickname  turchasing Requisitions  dd Description  ap 2: Select Destination Folder  New  Top level personal folder  Subfolder of selected folder  Financial Services Requisitions  Shared No shared folder available



- 18. Create a name for your folder and click **Save**.
- To access your saved searches in the future, menu by selecting Orders & Documents » Document
   Search » View Saved Searches.

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Ì	Shop 〉 My Carts and Orders 〉 View My Orders (Last 90 Days) マ 〉 Document Search
1	Orders & Documents
<b>*</b>	Search Documents View Saved Searches
Ê	Download Export Files
	Type: Requisition

20. Your list of saved searches will appear. Choose the report from the appropriate folder and select **Go** to run the search.

Orders & Documents > Document Search > View Sa	ved Searches 🗢 👌 Document Search		
🔯 New 😥 Edit 🔯 Move/Copy 🙀 Delete	Administration and Finance	Requisitions	
(+) expand all (-) collapse all	Results per page 20 •	Total Searches : 1	🔳 Page 1 of 1 上
Personal			edit   move/copy   delete 🛑
Administration and Finance Requisitions Financial Services Requisitions	Purchasing Requisitions		Add Shortcut Export Go edit move/copy lelete
Shared			

21. To export the search results, run the search and then select **Export Search**.

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	start new search	Showing <b>1 - 5</b> of 5 res	sults
1 B	Search Terms	Results per page 500 💌	
6	Shopper	Requisition No.	Supplier(s)
<b>f</b>	Ryan Requester1	<b>←</b> 1045550 🕰	MICROSCOPE.COM
≞	Filtered By	<i>≷</i> 1034084 🗟 🕅	MICROSCOPE.COM
	Type: Requisition	<b>←</b> 1034006 🕰	MICROSCOPE.COM
	Date Range: Last 90 days	<i>≷</i> 1021164 🖻 🕅	NORMAN STAMP AND SEAL CO
	Save Search Export Search	← 1021062 🕰	MICROSCOPE.COM



22. A popup box will appear and you should name the file, select an **Export Type** and then click

## Submit Request.

File Name	Recent Purchasing R	eqs
Description		
		expand   clear
Export Type	Screen Export	Load Save Paste
<b>Note:</b> The time required to o of the request as well as the	Transaction Export Full Export	equest depends upon the size ther pending requests.
	Submit Request Clo	File Name

- 23. Export Types:
  - a. **Screen Exports:** Screen exports will export the search results exactly as they appear on the results screen with no additional data. The data in the screen results will vary based on the document type you have searched for.
  - b. Transaction Exports: Transaction exports will export all information available about the transaction associated with each document. Transaction exports cannot be used for All Document searches.
  - c. **Full Exports:** Full exports will export all information available about the transaction associated with each document. Full exports also include document history such as approvals, comments and more. Transaction exports cannot be used for All Document searches.
- 24. A message at the bottom of the screen will appear noting that your request has been submitted.

25. Close out of the popup window and from Search Documents, select Download Export Files.

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Ì	Orders & Documents > Document Search > start new search edit search	Search Documents > Document Search	٦
	Show		
4	Search Terms 1 Resu	Download Export Files	J

26. Once your export has processed, click on the file name to download the zip file.

Download Exports       Recurring Exports         Exports with a status of 'Complete' are available to be downloaded. Exports with hours depending on the amount of data being exported.         If you would like to receive an email notification when your export is ready, maked            • Click to filter exports         • ?         • • • • • • • • • •	1	Crimson corner	R
Exports with a status of 'Complete' are available to be downloaded. Exports with hours depending on the amount of data being exported. If you would like to receive an email notification when your export is ready, make Click to filter exports ? Results per page 20 File Name Description Request Date / Time		Orders & Documents >> Document Search >> Download Export Files ->>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Search Results Ex
hours depending on the amount of data being exported.         If you would like to receive an email notification when your export is ready, make            • Click to filter exports         • ?          Results per page 20       ?          File Name          • Description         • Request Date / Time		Download Exports Recurring Exports	
Results per page  20  Results    File Name  Description  Request Date / Time		Exports with a status of 'Complete' are available to be downloaded.	Exports with a s
File Name			ready, make su
·····		If you would like to receive an email notification when your export is	
Recent Purchasing 10/18/2013 11:38 AM		If you would like to receive an email notification when your export is                •••••••••••••••••••••••••	
Regs.zip		If you would like to receive an email notification when your export is                •••••••••••••••••••••••••	? Result

27. Depending on the export type selected, you may see one or more CSV files available for your .

review.

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Organize 👻 Extract all files		•	•
🔆 Fa	Туре	Compressed size	Passwor
E Recent Purchasing Reqs	Microsoft Excel Comma S	1 KB	No
🔁 Lib 🛅 C			