Document Searches
1. To view any recent Requisition or Purchase Orders, click on the profile name.
2. Select any of the options listed to view the corresponding orders.
2. OR, click the Paper and Pen icon to access the Document Search to conduct a more comprehensive search for and Requisitions, Purchase Orders, or Receipts. Forms are considered Requisitions since they travel in carts/requisitions.
3. Select Search Documents from the pop up.
4. The simple search includes searching by Document Type or within a Specific Date range.
5. Leaving the Search set to All Documents and All Dates will pull all documents the user has access to. In order to see a document the user must have created it, been assigned the cart, or approved it.
6. Notice the Filtered By and Refine Search Results are available to narrow down the search criteria.
7. To perform an advanced search, click on the advanced search button.
8. To search All Documents, choose 1 or more fields to enter and click Go.
9. If the Document Type is changed to Requisition, Purchase Order, or Receipt, the search engine will expand to include several additional field to search by including: Accounting Codes, Workflow Status, Supplier Status, Receipt Status, etc.