There are several search features available in HokieMart and several different ways to navigate to the various search features. Users will find their favorite ways to search HokieMart.

Note that there are two different kinds of searches in HokieMart. There are search options related to:

- shopping for items in the Hosted Catalogs, such as the “Advanced Search”. *Search options related to shopping in HokieMart are discussed in another section.*
- “Document Searches” for finding documents related to HokieMart orders, such as PR’s PO’s, Invoice, Receipts, and Shared Department. *The searches discussed in this section are related to document search features.*

In this section:

- Searching by PR and PO History
  - Quick Document Preview
- Document Search Options
  - Quick Search
  - Advanced Document Search Feature
  - Menu Search Option
  - Simple Search
- Search by Approver
- Searching for Shared Departments

**Searching by PR and PO History**

PRs and POs can be viewed for 90 days after completion using the drop down menu located under the user profile.

Or they can be found by using the Search Menu icon (Alt + M) located on the lower left hand corner of the screen. A keyword search returns a list of pages containing the desired keyword. Search results are clickable and will take the user directly to the desired search page.

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PRs and POs prepared prior to 90 days can be accessed with a history query. The best method of searching is to search by PR History. This will provide users with all requisitions that have been submitted. This will display PRs if they have not yet been approved and POs if they have been approved.

Users have the ability to search

- “Prepared for”
- “Prepared by”
- “Type”
- “Date Range”
- “Approved by”
- “Custom Fields”

Users may also search by particular Accounts or Funds.

- “Department”
- “Form Type”
- “Prepared by”
- “Status Flag”
- “Supplier”.

Select the desired search options.
Quick Document Preview

When viewing search results for PRs and POs, the user will be able to see a quick “preview” of the document. A small icon will appear next to each Requisition or Purchase Number. Click on this icon to view an overlay that displays information about that document.

The preview contains document-specific information that will help the user identify the required PR or PO without leaving the search results screen. The “Quick View” will display.

Note: the print icon is available for the user to print a copy of requisition if necessary.
**Document Search Options**

The document search feature is a useful tool providing users with the ability to search all documents. The search feature includes Purchase Requisitions, Purchase Orders or Invoices, plus other options. There are various methods to search for documents in HokieMart.

**Quick Search**

In the upper-right portion of the screen, a magnifying glass icon (Alt + Q).

From the drop-down listing, select **Documents** and enter the **known number information**. By selecting **Documents**, **ALL** types of documents will be searched. When complete, click “Go”.

The matching document will be displayed. Also displayed will be the current status of the document in the workflow. The example displayed below is still pending.

**Advanced Document Search Feature**

There are several ways to access the advanced Document Search feature. This feature provides the user with the ability to conduct more detailed searches. Users may select any of the search available options from the drop-down list provided.

*Note: There is also an Advanced Search which allows users to search and view items for shopping (this is discussed in another section). The search discussed in this section is the advanced Document Search feature.*

An added benefit to the advanced documents search feature is it allows users to view the funding of a particular PR or PO.
Menu Search Option

In the new Phoenix User Interface there are several different ways to locate and access the document search feature. The screen and functionality have not changed from the Classic View.

On the side bar locate and click on either the:

- the Orders & Documents icon (upper left side of the screen):

- the Menu Search icon (lower left side of the screen). By simply typing in the letter “s” a list of search options will appear in the Menu Search box. Choose “Search Documents.”
In order to view funding information, select Requisitions or Purchase Orders, Invoice or Receipts from the available drop-down list. Each option will provide different search fields that are appropriate for the search option selected.

In these screens the user has the ability to provide as much information as necessary to retrieve results.

In this example “Requisition” was selected as the option.

Some fields provide a drop-down menu to assist in searching.

- Click “Go”.

Results are then displayed.

By selecting on a specific requisition number, details for that requisition will be displayed. Once selected, a screen will display allowing for various selections to be made.
Simple Document Search

A simple search option is available by clicking on the words “simple search” in the upper right hand corner of the Search Documents screen. A limited search window will display. There are three fields which may be used in completing a search.

1. **Search:**

There is a drop-down option available to select a particular type of document to search. Leaving set to all will display all types.
- All documents (this will include all combinations listed below)
- Requisitions
- Purchase Orders
- Invoices (only includes invoices where vendors electronically invoice - eInvoices)

2. **Center:**

The center field allows users to enter specific information. By selecting a particular document type and entering unique information specific results will be returned.

Information that may be entered based on search selection:

- Requisition Number
- Requisition Name
- Purchase Order Number
- Invoice Number
- Supplier Invoice Number
- Contract Number
- Catalog Number
- Supplier Name
3. **Date Range:**

Users will also be able to identify a specific date range. There are several options to select from.

Remember, results returned will be drastically affected by the date range selected.
**Search by Approver**

As the need arises the requestor can perform a history search which will provide a list of the Purchase Requisitions (PRs) approved by individual **Approvers**. Navigate to the document search feature.

- Click on Search Documents to bring up the search screen

- If searching for one Approver, simply type the name in directly in the “Approved By” field box

- For an advanced approver search click on the search icon next to the “Approved by” line to open User Search Box.
This feature allows the user to search for multiple Approvers in a single search

- Enter the last name of the first Approver.
- Click “Search”

- Click “select” and then click “Add Selected Users”

- This will add the Approver to the search field. Continue adding Approvers as needed.
- When finished click close to return to the main Document Search screen.
In this sample single “Approved By” search

- Select “Start Date” and “End Date” for the range of the search.
- Select “Department” or any other search options available that will assist the user and narrow the search.
- Click on “Go”.

This is an example of a completed search form. All PRs will be listed for the chosen Approver in the chosen date range. In the left side panel the user can see the search options selected for this search.
Searching for Shared Departments

As the need arises the user can perform a search which will provide a list of the Purchase Requisitions (PRs created for Shared Departments. Navigate to the document search feature.

- Click on Search Documents to bring up the search screen

- Type Shared Department in the Prepared For field
All Shared Department PO’s for selected search criteria should appear.

- One additional sort option is available. The user can select and sort by: Best match, Submit date newest first, Submit date oldest first, Total high to low, or Total low to high.