

# QG – Document Search Feature

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:

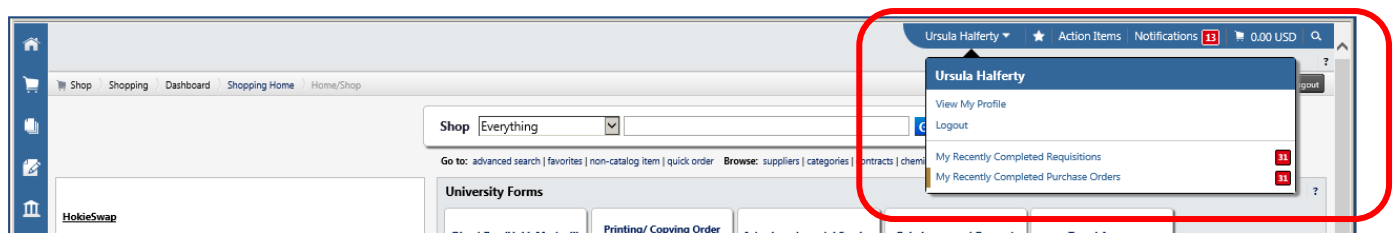
- shopping for items in the Hosted Catalogs, such as the “Advanced Search”. *Search options related to shopping in HokieMart are discussed in another section.*
- “Document Searches” for finding documents related to HokieMart orders, such as PR’s PO’s, Invoice, Receipts, and Shared Department. *The searches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


*In this section:*

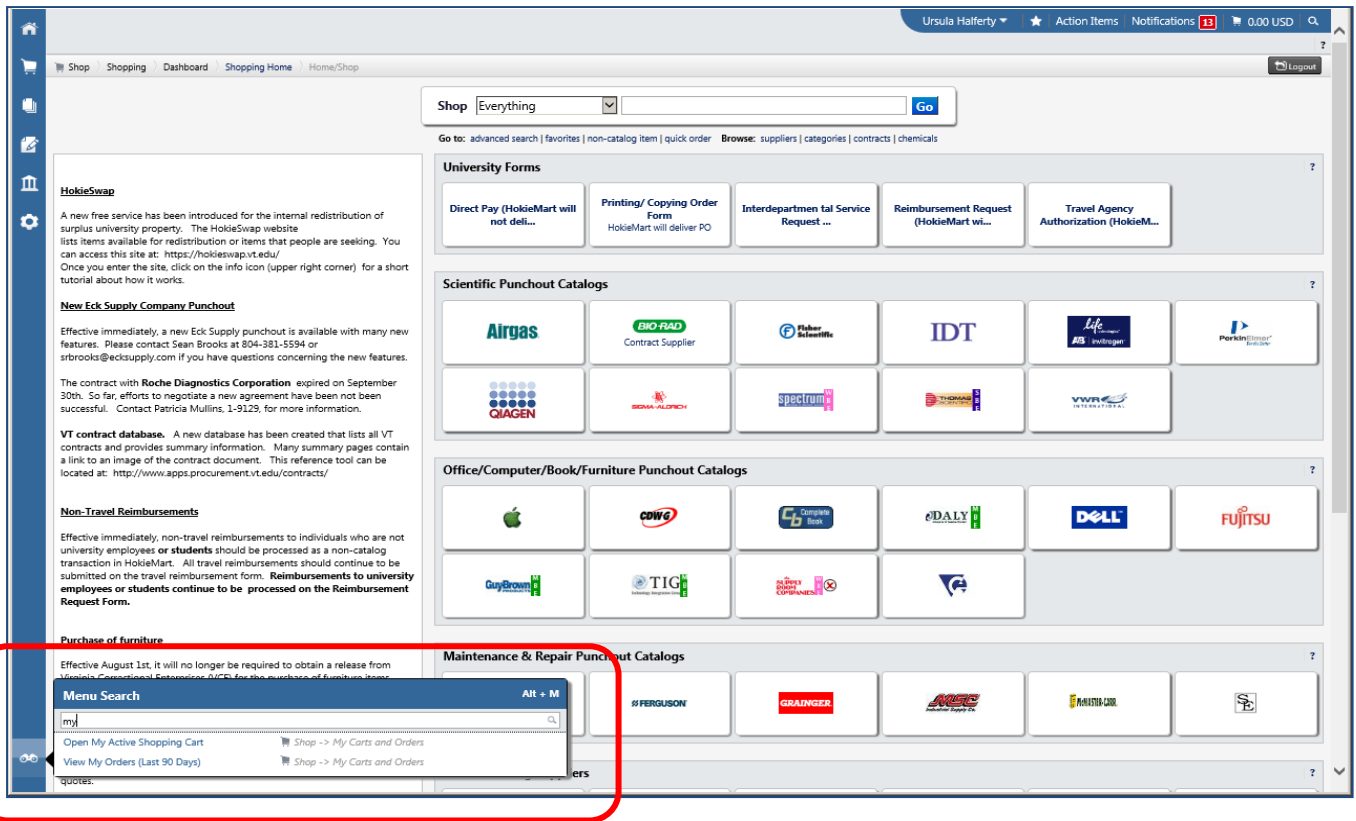
- Searching by PR and PO History
  - Quick Document Preview
- Document Search Options
  - Quick Search
  - Advanced Document Search Feature
  - Menu Search Option
  - Simple Search
- Search by Approver
- Searching for Shared Departments

## Searching by PR and PO History

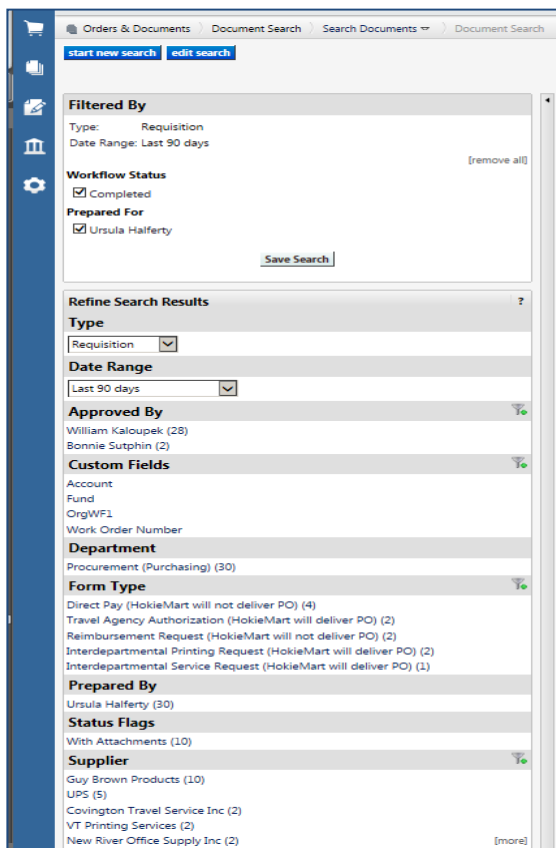
PRs and POs can be viewed for 90 days after completion using the drop down menu located under the user profile



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.



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.

Showing 1 - 20 of 818 results      Last 90 days (10/6/2013-1/3/2014)

Results per page: 20      Sort by: Best match      Page 1 of 41

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
46286230		Fisher Scientific	Shared Department	1/3/2014 9:28 AM	0.00 USD
46295208	Atmos Energy	112 gas	Shared Department	1/2/2014 4:21 PM	1,749.16 USD
46295096	Atmos Energy	112 CNS	Shared Department	1/2/2014 4:20 PM	226.96 USD
46294237	Fisher Scientific Company LLC	motor	Shared Department	1/2/2014 4:10 PM	613.84 USD
46294354	Atmos Energy	3103 gas	Shared Department	1/2/2014 4:04 PM	51.70 USD

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.*

Return to Search Results      11 of 46 results      Requisition Number(s) 46286230

Requisition Summary      Shipping      Billing      Attachments (1)      History

Status: **Completed** (11/25/2013 1:57 PM)

Submitted: 11/25/2013 11:43 AM

Chart Name: 2013-11-25-glorioth-02

Priority: Normal

Leave date blank unless next fiscal year order (then enter 07/01/2014)

Prepared by: Gloria Smith

Work Order Number: N/A

**Ship To:** Contact Name: Chris W. Smith  
Phone: x1 (540) 213 5660  
Email: cjsmith@vcc.edu  
Surplus Property  
1425 South Main St  
Blacksburg, VA 24061  
United States

**Delivery Options:** Ship Via: Best Carrier Best Way  
Send to Supplier? User Will Deliver  
Notify AP Prepayment

**Bill To:** Accounts Payable  
North End Center Suite 8300  
800 Turner Street NW  
Mail Code 0312  
Blacksburg, VA 24061  
United States

**Funding:**

Chart	Fund	Org/WF1	Account	Location	Activity
U	556600	047030	13440	NO 0000P	NO 0000P
University Chart	Surplus Prop Dept	Surplus Property	Other Mgmt. & Exgmt Services		

**Internal Notes and Attachments:** Note to all Suppliers, Attachments for all suppliers

**Supplier / Line Item Details:** Smith Reasor Auctioneer Inc.      Contract: TS 044 12      PO Number: P2578156


Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Auction services - \$2314.56 commission on November 23rd auction, auction gross \$77,152.00		EA	2,314.56	1 EA	2,314.56 USD
<b>Supplier subtotal</b>					2,314.56USD
<b>Subtotal</b>					2,314.56
<b>Total</b>					2,314.56 USD

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

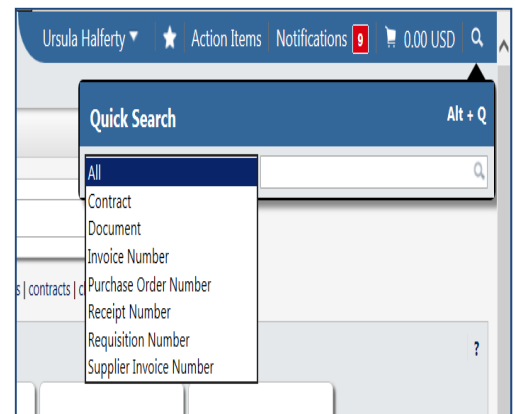
## Document Search Options


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  (Atl + 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. 

A screenshot of the 'Document Search' results page. It shows 'Showing 1 - 1 of 1 results' and 'All Dates'. The search parameters are 'Results per page: 20' and 'Sort by: Best match'. The results table has the following data:

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
46265839	UPS	2013 12 31 UPS	Ursula Halferty	1/2/2014 9:24 AM	96.83 USD

### 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.




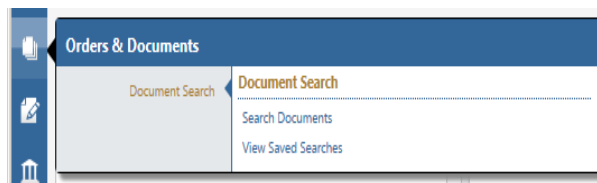
## Menu Search Option




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.”

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

Search  simple search

Document Number(s)

**Document Information**

Participant(s)

Owner

Date

Total Amount

Supplier

Department

**Item/Product Information**

Catalog Number(SKU)

Product Description

Product Flags

<input type="checkbox"/> Controlled substance	<input type="checkbox"/> Energy Star
<input type="checkbox"/> Green	<input type="checkbox"/> Hazardous material
<input type="checkbox"/> Rad Minor	<input type="checkbox"/> Radioactive
<input type="checkbox"/> Recycled	<input type="checkbox"/> Select Agent
<input type="checkbox"/> Toxin	

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

Go to: simple search | my requisitions | my purchase orders | my invoices

Search  simple search

**Requisition Identification**  
 Requisition Number(s)   
 Requisition Name

**Requisition Information**  
 Participant(s)    
 Prepared For   
 Prepared By    
 Approved By    
 Date  Submit Date  All Dates   
 Total Amount   
 Supplier    
 Department

**Item/Product Information**  
 Catalog Number(SKU)   
 Product Description   
 Commodity Code    
 Form Name   
 Form Type    
 Product Flags  
 Controlled substance  Energy Star  
 Green  Hazardous material  
 Rad Minor  Radioactive  
 Recycled  Select Agent  
 Toxin

**Contract Information**  
 Contract Number

**Purchase Order Identification**  
 Purchase Order Number(s)

**Workflow**  
 Current Workflow Step

**Workflow Status**  
 Completed  Pending  
 Rejected  Withdrawn

**Status Flags**  
 With Rejected Lines  With Withdrawn Lines  
 With Errors  With Attachments

**Custom Fields**

Account	<input type="text" value="Is Exactly"/> <input type="text"/>	Add another Account
Fund	<input type="text" value="Is Exactly"/> <input type="text"/>	Add another Fund
OrgWF1	<input type="text" value="Is Exactly"/> <input type="text"/>	Add another OrgWF1
Work Order Number	<input type="text" value="Is Exactly"/> <input type="text"/>	Add another Work Order Number

Go to: simple search | my requisitions | my purchase orders | my invoices

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.

Orders & Documents | Document Search | Search Documents | Document Search

Showing 1 - 1 of 1 results All Dates

Results per page  Sort by: Best match Page 1 of 1 ?

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
<a href="#">46265839</a>	UPS	2013 12 31 UPS	Ursula Hafferty	1/2/2014 9:24 AM	96.83 USD

Search Terms  
 Requisition Number(s)  
 46265839

Filtered By

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.

The screenshot shows a search interface with three callouts: 1 points to the 'All Documents' dropdown menu, 2 points to the central search input field, and 3 points to the 'All Dates' dropdown menu. Below the search bar is a 'Go' button and a 'Go to:' section with links for 'advanced search', 'my purchase orders', and 'my invoices'. A small instruction text reads: 'Enter search terms such as document numbers, suppliers, and product information.'

### 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)

The dropdown menu is open, showing the following options: All Documents (selected), Requisitions, Purchase Orders, and Invoices.

### 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.

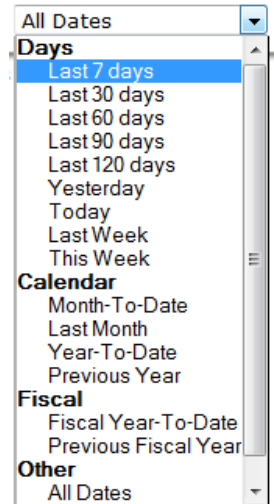
Information that may be entered based on search selection:

- |                         |                           |
|-------------------------|---------------------------|
| ■ Requisition Number    | ■ Supplier Invoice Number |
| ■ Requisition Name      | ■ Contract Number         |
| ■ Purchase Order Number | ■ Catalog Number          |
| ■ Invoice 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.

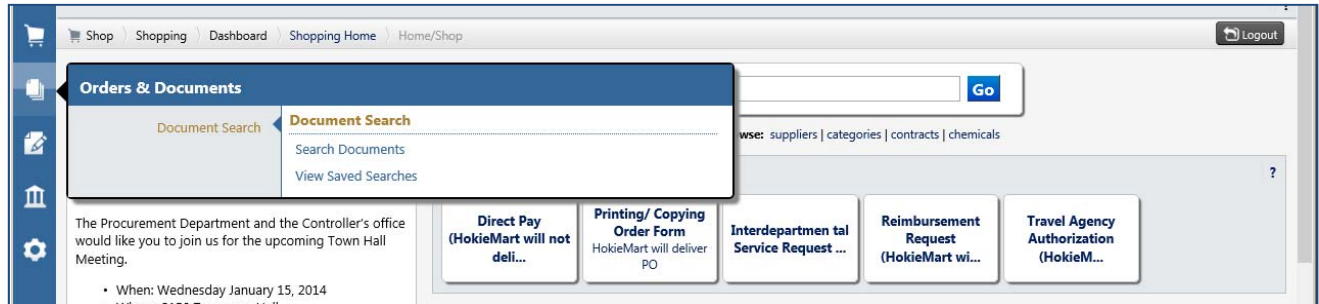




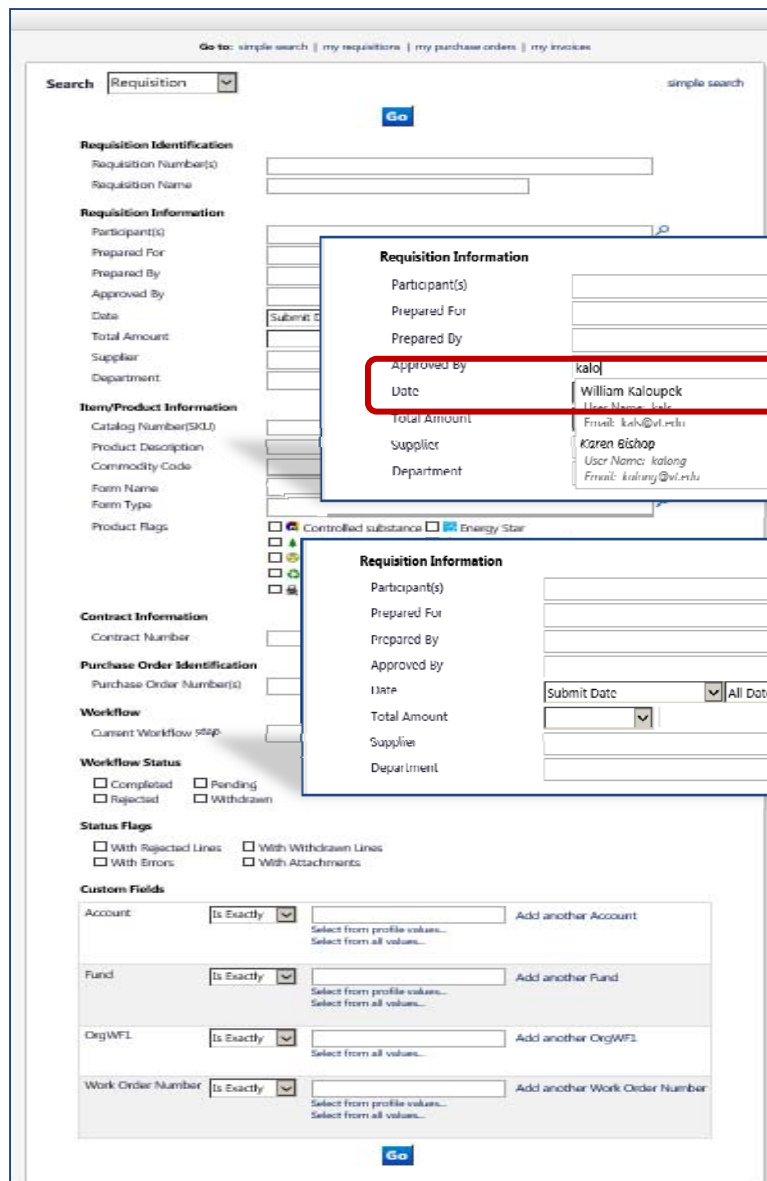
## Search by Approver


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



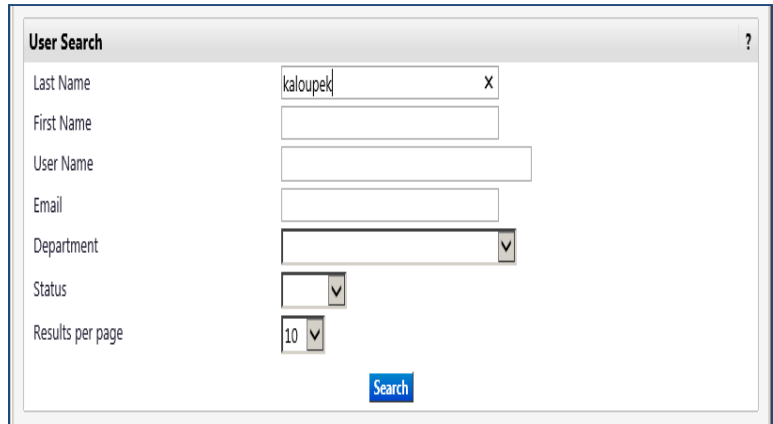
- If searching for one Approver, simply type the name in directly in the “Approved By” field box



- 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

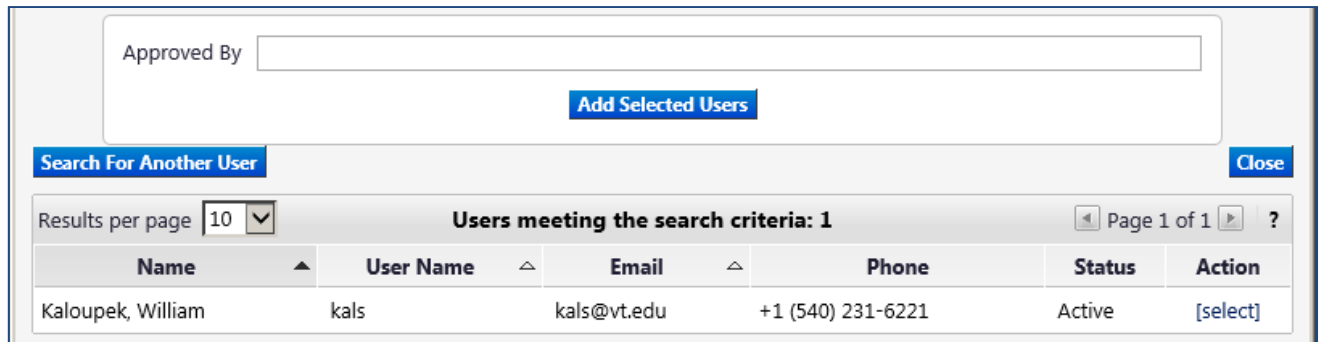
- Enter the last name of the first Approver.
- Click “Search”



The 'User Search' dialog box contains the following fields and controls:

- Last Name: Input field with 'kaloupek' and a clear 'X' button.
- First Name: Empty input field.
- User Name: Empty input field.
- Email: Empty input field.
- Department: Dropdown menu.
- Status: Dropdown menu.
- Results per page: Dropdown menu set to '10'.
- Search: Blue button.

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

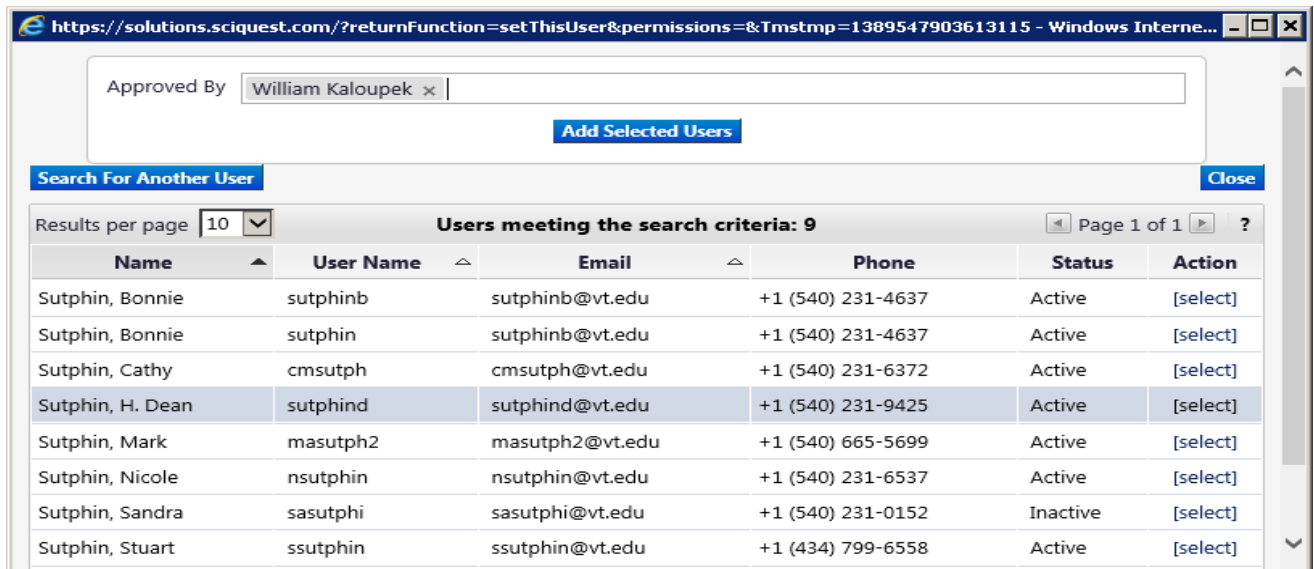


The dialog shows the 'Approved By' field with a blue 'Add Selected Users' button below it. At the bottom, there are 'Search For Another User' and 'Close' buttons. Below the dialog, a table displays the search results:

Results per page: 10 | **Users meeting the search criteria: 1** | Page 1 of 1

Name	User Name	Email	Phone	Status	Action
Kaloupek, William	kals	kals@vt.edu	+1 (540) 231-6221	Active	[select]

- 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.



The dialog now shows 'Approved By' with 'William Kaloupek' selected. The table below shows 9 search results:

Results per page: 10 | **Users meeting the search criteria: 9** | Page 1 of 1

Name	User Name	Email	Phone	Status	Action
Sutphin, Bonnie	sutphinb	sutphinb@vt.edu	+1 (540) 231-4637	Active	[select]
Sutphin, Bonnie	sutphin	sutphinb@vt.edu	+1 (540) 231-4637	Active	[select]
Sutphin, Cathy	cmsutph	cmsutph@vt.edu	+1 (540) 231-6372	Active	[select]
Sutphin, H. Dean	sutphind	sutphind@vt.edu	+1 (540) 231-9425	Active	[select]
Sutphin, Mark	masutph2	masutph2@vt.edu	+1 (540) 665-5699	Active	[select]
Sutphin, Nicole	nsutphin	nsutphin@vt.edu	+1 (540) 231-6537	Active	[select]
Sutphin, Sandra	sasutphi	sasutphi@vt.edu	+1 (540) 231-0152	Inactive	[select]
Sutphin, Stuart	ssutphin	ssutphin@vt.edu	+1 (434) 799-6558	Active	[select]

Search  simple search

**Requisition Identification**

Requisition Number(s)

Requisition Name

**Requisition Information**

Participant(s)

Prepared For

Prepared By

Approved By

Date

Total Amount

Supplier

Department

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.

Orders & Documents > Document Search > Search Documents > Document Search

start new search edit search

Showing 1 - 7 of 7 results **Last 7 days (1/6/2014-1/12/2014)**

Results per page 20 Sort by: Best match Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
✓ 46501487	Guy Brown Products	2014-01-09 Guy Brown	Ursula Halferty	1/10/2014 4:09 PM	307.73 USD
✓ 46465434	Hall's Garage Doors	2014-01-09 glsmith 01	Gloria Smith	1/9/2014 10:44 AM	265.00 USD
✓ 46357981	VT Facilities Services	2014-01-06 Permanent Name tags	Ursula Halferty	1/9/2014 10:27 AM	128.24 USD
✓ 46424135	Sanico	2014-01-08 glsmith 02	Gloria Smith	1/8/2014 11:38 AM	117.31 USD
✓ 46338460	Guy Brown Products	2014-01-06 GUY BROWN	Ursula Halferty	1/6/2014 11:48 AM	168.90 USD
✓ 46287215	VT Printing Services	2014-01-02 glsmith 01	Gloria Smith	1/2/2014 2:04 PM	1,055.00 USD
✓ 46265839	UPS	2013-12-31 UPS	Ursula Halferty	1/2/2014 9:24 AM	96.83 USD

Results per page 20 Page 1 of 1

**Filtered By**

Type: Requisition

Date Type: Purchase Order Create Date

Date: Last 7 days

Range: [remove all]

**Approved By**

William Kaloupek

**Refine Search Results**

Type: Requisition

**Date Range**

Last 7 days

**Custom Fields**

Account

Fund

OrgWF1

Work Order Number

**Department**

Procurement (Purchasing) (7)

**Workflow Status**

Completed (7)

**Form Type**

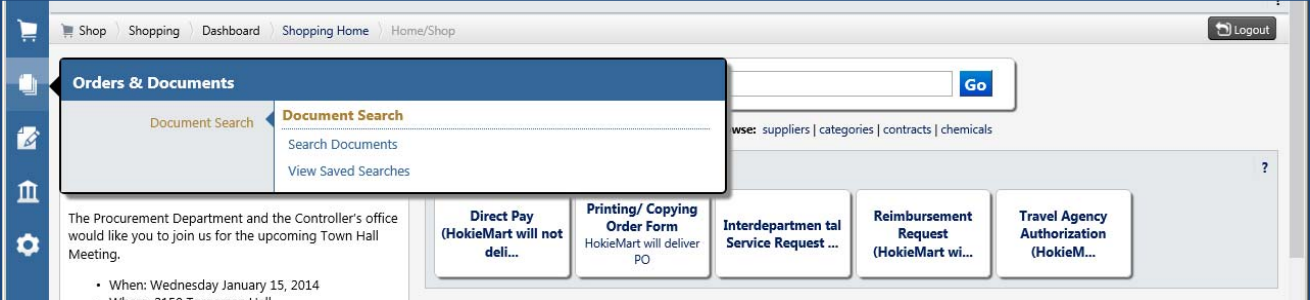
Interdepartmental Service Request (HokieMart will deliver PO) (1)

Interdepartmental Printing Request (HokieMart will deliver PO) (1)

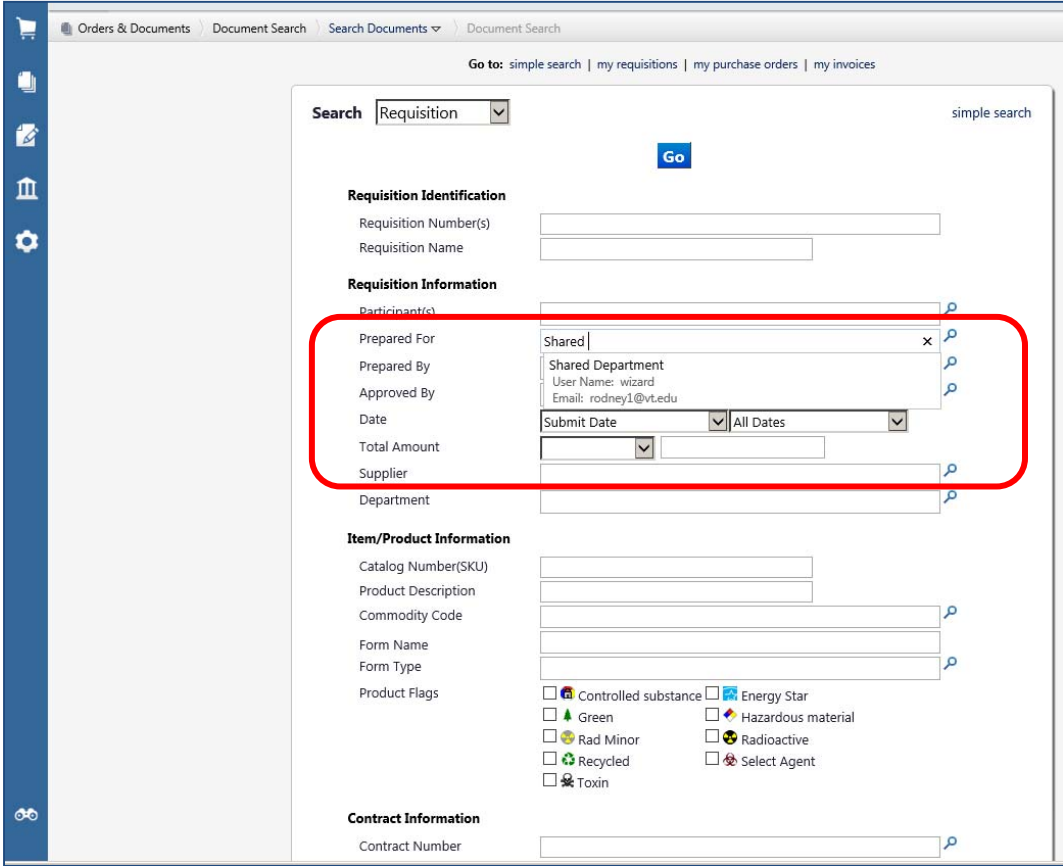
# Searching for Shared Departments

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.

Showing 1 - 20 of 58 results

Results per page: 20

Sort by: **Best match**  
 Submit date newest first  
 Submit date oldest first  
 Total high to low  
 Total low to high

Page 1 of 3

Requisition No.	Supplier(s)	Requisitioner	Requisition Date/Time	Requisition Total
46537215	Blacksburg Town	Shared Department	1/10/2014 4:47 PM	17.37 USD
46534789	VT Facilities Services	Shared Department	1/10/2014 4:13 PM	3,313.48 USD
46504315	W W Grainger Inc	Shared Department	1/10/2014 3:57 PM	875.25 USD
46533131	Joule Precision Certifications Inc dba JP Certifications	Shared Department	1/10/2014 3:52 PM	580.00 USD
46532916	VT Software Distribution	Shared Department	1/10/2014 3:51 PM	70.00 USD
46525763	Events Meetings & More	Shared Department	1/10/2014 2:23 PM	1,527.50 USD
46516118	New England Biolabs Inc	Shared Department	1/10/2014 12:02 PM	804.65 USD
46510473	Peter Allison	Shared Department	1/10/2014 11:07 AM	1,200.00 USD
46510308	Thornton Services Inc	Shared Department	1/10/2014 10:55 AM	5,219.60 USD
46498296	Davidson's Pharmacy PC	Shared Department	1/9/2014 5:42 PM	246.83 USD
46484133	USDA, Agricultural Research Service	Shared Department	1/9/2014 2:32 PM	946.68 USD
46479849	Mary Finnell	Shared Department	1/9/2014 1:41 PM	7.00 USD
46416117	Karen Peer	Shared Department	1/9/2014 1:35 PM	42.00 USD
46469531	Clear View Window Cleaning	Shared Department	1/9/2014 11:25 AM	75.00 USD
46460771	The Budd Group Inc	Shared Department	1/9/2014 9:25 AM	14,467.00 USD