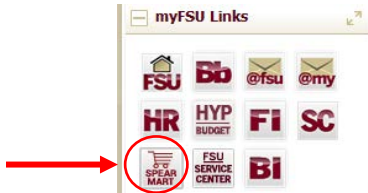


Overview

Document Search is an extremely powerful search engine for your past or pending orders, contracts, sourcing events etc.

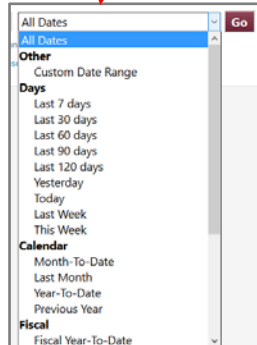
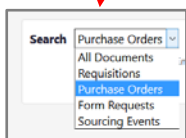
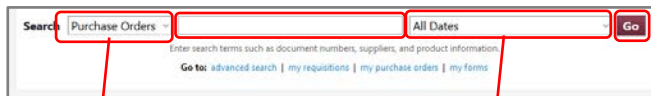
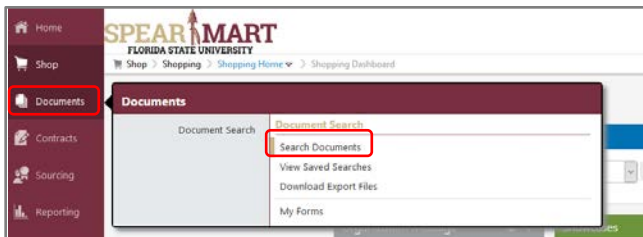
Access SpearMart by navigating to <https://my.fsu.edu/> and logging in with your MyFSU username and password, and then click the SpearMart Icon under MyFSU Links:



In this Job Aid we will cover the following:

- [Simple Search](#)
- [Advanced Search](#)
- [Saving a Search as a Favorite](#)
- [Exporting Search Results to MS Excel](#)

Simple Search



- Select type of document(s) you are searching for from the left dropdown
- Select the **Date** range or enter a custom date range to in the right dropdown
- Enter the search term (supplier name etc.)

In this example, the search was for all POs to Supplier Adventure Landing.

The screenshot shows the 'Document Search' results page. On the left, there is a 'Refine Search Results' section with filters for Type (Purchase Orders), Date Range (All Dates), and Supplier (Adventure Landing (72)). A red box highlights the 'Refine Search Results' header, and a red arrow points to the filter icon. Another red box highlights the filter icon for the 'Supplier' filter, with a red arrow pointing to the 'Adventure Landing (72)' option.

PO No	Supplier	Creation Date/Time	Requisition No.	Requester	Supplier Status	PO Total
FS1700581	ADVENTURE LANDING	2/16/2017 8:51 AM	1776191	Gwendolyn R. Drake	Sent	1,150.00 USD
FS1700578	ADVENTURE LANDING	2/15/2017 11:26 PM	1776082	To-Ha Tang (adm)	Sent	888.88 USD
FS1700555	ADVENTURE LANDING	2/15/2017 10:25 AM	1774472	Johnny Tester	Sent	950.00 USD
FS1700550	ADVENTURE LANDING	2/14/2017 4:19 PM	1773861	To-Ha Tang (adm)	Sent	888.00 USD
FS1700539	ADVENTURE LANDING	2/14/2017 1:08 PM	1773316	Gwendolyn R. Drake	Sent	1.00 USD
FS1700537	ADVENTURE LANDING	2/14/2017 9:20 AM	1743573	To-Ha Tang (adm)	Sent	375.00 USD
FS1700518	ADVENTURE LANDING	2/13/2017 3:06 PM	1772352	Linda D. Ross	Sent	1,872.80 USD
FS1700489	ADVENTURE LANDING	2/13/2017 10:44 AM	1770981	Angelena K. Lang	Sent	485.00 USD
FS1700431	ADVENTURE LANDING	2/6/2017 1:39 PM	1766589	Angelena K. Lang	Sent	225.00 USD
FS1700386	ADVENTURE LANDING	2/1/2017 2:07 PM	1762320	Gwendolyn R. Drake	Sent	15.00 USD
FS1700382	ADVENTURE LANDING	2/1/2017 2:00 PM	1758651	Gwendolyn R. Drake	Sent	15.00 USD
FS1700381	ADVENTURE LANDING	2/1/2017 1:58 PM	1760971	Angelena K. Lang	Sent	2,500.00 USD
FS1700369	ADVENTURE LANDING	1/27/2017 4:11 PM	1751569	Gwendolyn R. Drake	Sent	625.00 USD
FS1700364	ADVENTURE LANDING	1/27/2017 3:41 PM	1758603	Angelena K. Lang	Sent	600.00 USD
FS1700360	ADVENTURE LANDING	1/27/2017 3:30 PM	1758625	Angelena K. Lang	Sent	500.00 USD
FS1700359	ADVENTURE LANDING	1/27/2017 3:26 PM	1758375	Gwendolyn R. Drake	Sent	21.00 USD
FS1700357	ADVENTURE LANDING	1/27/2017 3:09 PM	1758590	Angelena K. Lang	Sent	1,200.00 USD
FS1700355	ADVENTURE LANDING	1/27/2017 2:57 PM	1752844	Geneva A. Miller	Sent	10.00 USD
FS1700354	ADVENTURE LANDING	1/27/2017 2:55 PM	1752610	Gwendolyn R. Drake	Sent	100.00 USD

You can refine your search results by using any of the filters on the left hand side of your screen by clicking on the filter icon.

Advanced Search

The screenshot shows the 'Documents' menu with 'Search Documents' highlighted. Below it, the search bar is shown with 'Purchase Orders' selected in the dropdown, 'All Dates' in the date range dropdown, and a 'Go' button. A red box highlights the 'Go' button and the search bar area.

There are a number of ways to use advanced search whether you are searching by a particular user, supplier, specific date range, one or more chart fields, \$ amount, date range, commodity code, etc. In the example below, we want to see all completed requisitions by Johnny Tester, over the last 30 days, using Fund 110.

Search **Requisitions** simple search

Requisitions

Purchase Orders
Form Requests
Sourcing Events

Requisition Information

Participant(s) Any Me Pick...

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

User Search

Last Name

First Name

User Name

Email

Department

Status

Results Per Page

Search

Prepared By

Add Selected Users

Search For Another User

Name	User Name	Email	Phone	Status	Action
Tester, Johnny	jtester	irobbins@fsu.edu	+1 (850) 644-9719	Active	[select]

Prepared By

Add Selected Users

Search For Another User

Name	User Name	Email	Phone	Status	Action
Tester, Johnny	jtester	irobbins@fsu.edu	+1 (850) 644-9719	Active	[select]

Search **Requisitions** simple search

Requisition Identification

Requisition Number(s)

Requisition Name

Requisition Information

Participant(s) Any Me Pick...

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

Days

- 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
- Previous Year

Fiscal

- Fiscal Year-To-Date

Fund **is Exactly** Add another Fund

Location **is Exactly** Add another Location

OCO Item **is Exactly**

PC Business Unit **is Exactly** Add another PC Business Unit

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

Search

Saving Searches as Favorites

Continuing from our example above, click the **Save New Search** button on your results screen.

Showing 1 - 8 of 8 Results Last 30 days (1/22/2017-2/20/2017)

Results Per Page: 20 Sort by: Best match Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requester	Requisition Date/Time	Requisition Total
1777449	ADVENTURE LANDING	Lab Widgets #2	Johnny Tester	2/17/2017 8:24 AM	17.97 USD
1777027	ADVENTURE LANDING	Lab Widgets	Johnny Tester	2/17/2017 8:21 AM	17.97 USD
1774472	ADVENTURE LANDING	2017-02-15 #jester 05	Johnny Tester	2/15/2017 10:24 AM	675.00 USD
1774470	VWR INTERNATIONAL LLC	2017-02-15 #jester 04	Johnny Tester	2/15/2017 8:27 AM	175.30 USD
1774447	VWR INTERNATIONAL LLC	2017-02-15 #jester 03	Johnny Tester	2/15/2017 7:36 AM	282.97 USD
1774445	VWR INTERNATIONAL LLC	2017-02-15 #jester 01	Johnny Tester	2/15/2017 7:34 AM	11.65 USD
1768202	ACE SURGICAL SUPPLY COMPANY	2017-02-07 #jester 01	Johnny Tester	2/15/2017 7:33 AM	89.00 USD
1767021	W W GRAINGER INC	2017-02-06 #jester 01	Johnny Tester	2/6/2017 9:52 PM	405.25 USD

Results Per Page: 20 Page 1 of 1

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Nickname *

Hide Description

Description

486 characters remaining

Step 2: Select Destination Folder

Personal
You have no personal favorites.

Shared
You have no shared favorites.

* Required

- Give your **Search** a name
- You can add a description if you'd like

If you do not have a Folder under your Personal Favorites, you will need to create one by clicking **Add New**.

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Nickname *

Hide Description

Description

486 characters remaining

Step 2: Select Destination Folder

Personal
You have no personal favorites.

Shared
You have no shared favorites.

* Required

Create Personal Folder

Name *

Description

254 characters remaining

* Required

Add to Saved Searches

Step 1: Edit Saved Document Search Details

Nickname *

Hide Description

Description

486 characters remaining

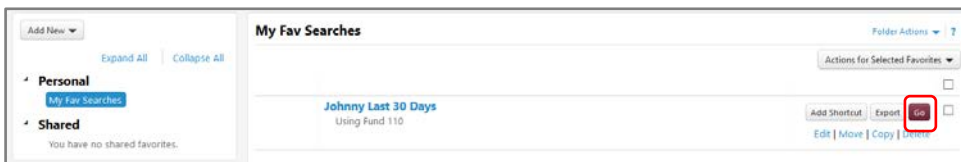
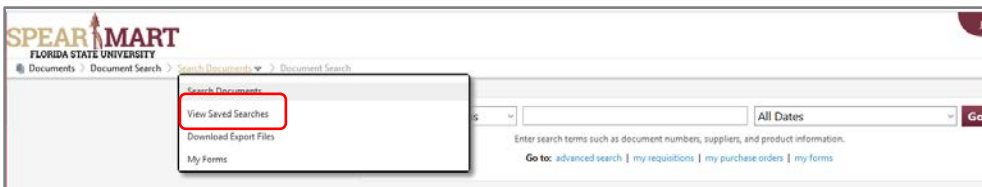
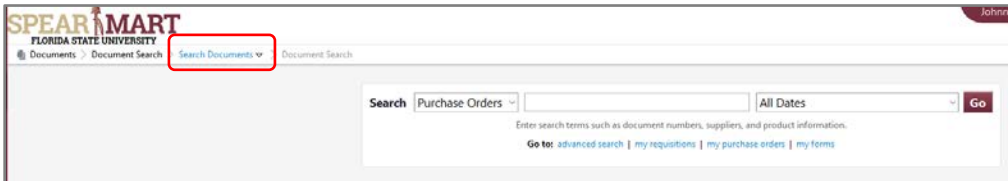
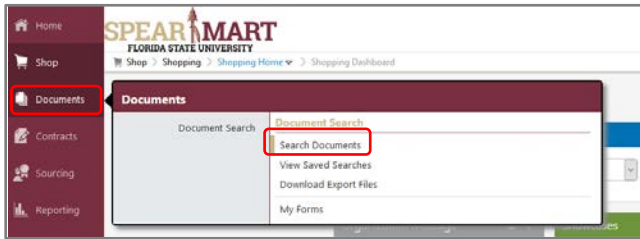
Step 2: Select Destination Folder

Personal
 My Fav Searches

Shared
You have no shared favorites.

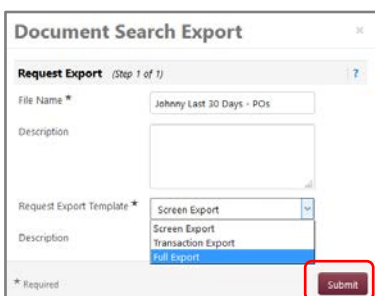
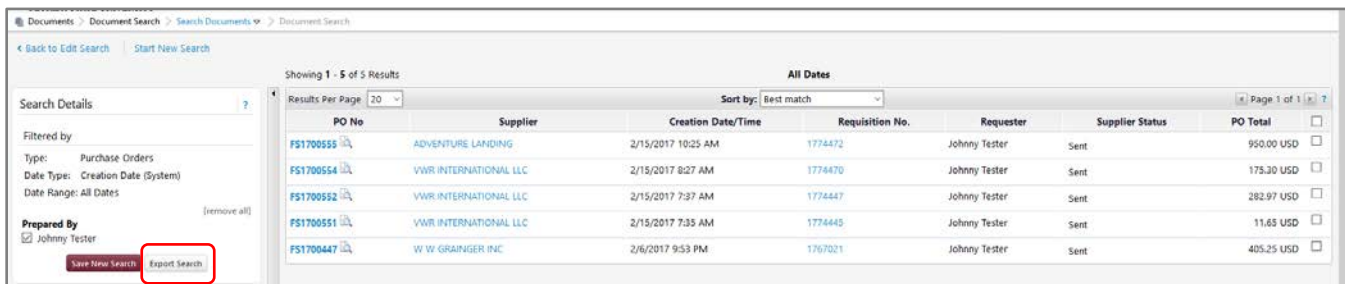
* Required

To retrieve your saved search after creating it, see below.



Exporting a Search to MS Excel

In this example, Johnny Tester would like to export his POs from the last 30 days. He first follows the instructions from the Advanced Search Section above to view his POs from the last 30 days as shown below.



- Give your **Export** a Name
- Choose the type of **Export Template**
 - **Screen Export** - Exports only the information available in the search results screen for each document
 - **Transaction Export** - Exports an expanded set of information on the documents.
 - **Full Export** - Exports transactions with history.

Request Submitted

The export request has been successfully submitted.

Pending and completed exports are available in:
Documents > Document Search > Download Export Files

Note: The time required to complete this export request depends upon the size of the request as well as the size and number of other pending requests.

[Go to Page: Download Export File](#) Close

Documents > Document Search > Download Export Files > Search Results Exports

Download Exports | Recurring Exports

Exports with a status of 'Complete' are available to be downloaded. Exports with a status of 'Pending' are currently being queued by the system. The amount of time it takes to generate an export file will vary based on the amount of data being exported.

If you would like to receive a notification when your export is ready, make sure 'Search Result Export Confirmation' is selected in your [Notification Preferences](#)

[Click to filter exports](#) Remove Selected

Results Per Page: 20 Results found: 1 Page 1 of 1

File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status
Johnny Last 30 Days - POs.zip		2/20/2017 2:36 PM	2/27/2017	5.0 Kbytes	Completed

Opening Johnny Last 30 Days - POs.zip

You have chosen to open:

Johnny Last 30 Days - POs.zip
which is: Compressed (zipped) Folder
from: <https://usertest.sciquest.com>

What should Firefox do with this file?

Open with: Windows Explorer (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

AppData > Local > Temp > Johnny Last 30 Days - POs.zip

Name
POApprovalHistory_Johnny Last 30 Days - POs.csv
POData_Johnny Last 30 Days - POs.csv
POFormData_Johnny Last 30 Days - POs.csv
POHeaderCustomData_Johnny Last 30 Days - POs.c...
POLineCustomData_Johnny Last 30 Days - POs.csv
POSupplierData_Johnny Last 30 Days - POs.csv