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DOCUMENT SEARCH AND EXPORT

Document Search allows users to locate and manage purchasing and invoicing documents in Panther Mart. Users can search for purchase requisitions, purchase orders, vouchers, and/or receipts, depending on a specific user’s permissions. Requestors can review the details of requisitions and placed orders. Departmental administrators and approvers can review orders for their department. Document Search can also be used as a reporting tool.

DOCUMENT SEARCH

This guide focuses on performing document searches. Documents include purchase requisitions, purchase orders, vouchers, and receipts.

Key Concepts

SIMPLE SEARCH

Simple Search searches for documents based on document type, search terms and date range.

- **Document Type** – In the document type drop-down, you select the type of document you are searching for. You can search for a specific type (Requisition, Purchase Order, Voucher, or Receipt) or you can search for ALL documents.

- **Search Terms** – In the search box, you enter the term that you are searching for. You can search by Requisition Number, Purchase Order Number, Voucher Number, Supplier Invoice Number, Contract Number, Catalog Number, Requisition Name, and Supplier Name.

- **Date Range** – In the date drop-down box you select the relative date-range for the query. You can choose by number of days, calendar span, fiscal year, all dates, or you can create a custom date range.
ADVANCED SEARCH
Advanced Search offers users the option to enter very specific, detailed search criteria. Advanced Search gives users the ability to pre-define search criteria. Users should use advanced search when they know of specific criteria on which to search.

You can perform an advanced search across multiple documents or select a specific document type. The screen below shows the search criteria available for an All Documents Advanced Search:
The following search criteria are available for all document type searches:

- **Document Number** – Enter the document (Requisition, Purchase Order, Voucher, or Receipt). This field name will vary based on the type of document for which you are searching. For example, if you are searching for purchase orders, this field will be name PO Number.

- **Document Information** – In this section of the Advanced Search you select and/or enter any specific information related to the document such as the document owner, date ranges, purchase amount, supplier, department and Business Unit. Additional Document Information search criteria may be available depending on the document type.

- **Item/Product Information** – In this section of the Advanced Search you select and/or enter information related to the items such as catalog number, product description and product flags. Additional Item/Product Information search criteria may be available depending on the document type.

The Advanced Search screen for each document type will provide additional search. In general, the criteria will vary based on the document type for which you are searching.

**Document Search Exercises**

**PERFORM A SIMPLE DOCUMENT SEARCH**

The purpose of this exercise is to demonstrate how to perform a simple document search. Use Simple Search to do a high-level search for documents and get a broad results-set.
Step-by-Step

1. Select the document search tab.

2. If you are brought to the Advanced Search screen select the simple search link at the top right. Panther Mart will automatically bring you back to the search screen you last used.

3. From the document drop-down box select the document type. Panther Mart will automatically populate the drop-down box with the document type from your most recent search.

- **All Documents** – Searches across all document types.
- **Requisition** – Searches all purchase requisitions.
- **Purchase Order** – Searches all purchase orders.
- **Voucher** - Searches all vouchers.
- **Receipt** - Searches all receipts.

4. In the text box enter the search term(s). You can search on the following:

- Participant (username, first name, last name, email address)
- Requisition number
- Requisition name
- Purchase order number
- Voucher number
- Supplier invoice number
- Catalog number (sku)
- Category code
- Product description (does not have to be exact description)
- Form name (will not return receipts)
- Supplier name
- Contract number
- Manufacturer name
- Receipt number
- Receipt packing slip number
- Receipt tracking number
- Receipt name
5. From the date drop-down box select the date range you would like to search.
   - **All Dates** – Searches all documents without regard to date. Document search will default to All Dates if no other date range is selected.
   - **Days** – Searches all documents in a selected range of calendar days (Last 7, 30, 60, 90, 120) or in a recent timeframe (Yesterday, Today, Last Week, This Week). **Note:** Panther Mart defines a week as Sunday 12:00 AM to Saturday 11:59 PM (based on the organization’s time zone). This is not currently configurable.
   - **Calendar** – Searches documents based on a calendar range (Month, Last Month, Year-to-Date, and Previous Year).
   - **Fiscal** – Searches documents based on an organization’s fiscal year (Fiscal Year-to-Date, Previous Fiscal Year).
   - **Custom Date Range** – Searches documents based on a date range defined by the user.

6. Once you have entered the search criteria select *Go*.

7. Your results will be displayed. The fields in the results set will vary based on the document type. Below is an example of a result set.

PERFORM AN ADVANCED SEARCH
The purpose of this exercise is to perform an advanced document search.

**Step-by-Step**

1. Select the **document search** tab.

2. Be sure you are on the Advanced Search page. If you are brought to the Simple Search screen select the **advanced search** link at the top right. **Panther Mart will automatically bring you back to the search screen you last used.**
3. From the Search drop-down box select the document type or select All Documents. **Panther Mart will automatically populate the document type from your most recent search in the drop-down.**

4. Enter search criteria. Available criteria will vary based on the document-type. The table below contains descriptions of the search criteria for all document types. Use this table as a reference if you are unsure of what should be entered in a specific search field.
<table>
<thead>
<tr>
<th>Search Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocation Status</td>
<td>If you are searching for documents with a specific allocation status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td>AP Status</td>
<td>If you are searching for documents with a specific AP status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td>Approved By</td>
<td>Enter the name of the person who approved the document. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td>Backorder Status</td>
<td>If you are searching for documents with a specific backorder status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>If you are searching for documents for a specific Business Unit, type in the business unit name. If the system recognizes the business unit it will auto-fill. Use the search button to search for business units. You can select multiple business units. Selecting the “x” to the right of the number will remove it from the list.</td>
</tr>
<tr>
<td>Buyer Invoice Name</td>
<td>Enter the name assigned to the buyer invoice when it was created.</td>
</tr>
<tr>
<td>Buyer Invoice Number</td>
<td>Enter the buyer invoice number. To enter multiple buyer invoice numbers, separate with commas.</td>
</tr>
<tr>
<td>Cancel Status</td>
<td>If you are searching for documents with a specific cancel status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td>Catalog number (sku)</td>
<td>If you are searching for documents that contain items with a specific catalog number, enter the number. Note that you should omit special characters from the catalog number.</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>If you are searching for documents that contain specific commodity codes, enter the codes. To enter multiple commodity codes, separate with commas. Selecting the “x” to the right of the commodity code will remove it from the list.</td>
</tr>
<tr>
<td>Contract Number</td>
<td>If you are searching for documents associated with a specific contract, enter the contract number. To enter multiple contract numbers, separate with commas. Selecting the “x” to the right of the number will remove it from the list.</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>If you are searching for documents that have specific values for custom fields, enter the criteria in this section. Your System Administrator will determine which custom fields will be available for document search.</td>
</tr>
<tr>
<td>Date</td>
<td>Use this field if you are searching for documents based on a specific date type and/or date range.</td>
</tr>
</tbody>
</table>
- Select the date type; date types will vary based on the document type.
- Select the date range.
- **All Dates** – Searches all documents without regard to date.
- **Days** – Searches all documents in a selected range of calendar days (Last 7, 30, 60, 90, 120) or in a recent timeframe (Yesterday, Today, Last Week, This Week). **Note:** SelectSite defines a week as Sunday 12:00 AM to Saturday 11:59 PM (based on the organization’s time zone). This is not currently configurable.
- **Calendar** – Searches documents based on a calendar range (Month, Last Month, Year-to-Date, Previous Year).
- **Fiscal** – Searches documents based on an organization’s fiscal year (Fiscal Year-to-Date, Previous Fiscal Year).
- **Custom Date Range** – Searches documents based on a date range defined by the user.
- **Other Search Options:** Before or after a specific date, within the last or next specified days, Last History date (last day history on the document was updated).

<table>
<thead>
<tr>
<th>Department</th>
<th>If you are searching for documents for a specific department, enter the department name. If the system recognizes the department name the field will auto-fill. Use the search button ▲ to search for departments. You can select multiple departments. Selecting the “x” to the right of the number will remove it from the list.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External Requisition Number</strong></td>
<td>Enter the external requisition number. To enter multiple external requisition numbers, separate with commas. Selecting the “x” to the right of the number will remove it from the list</td>
</tr>
<tr>
<td><strong>External User</strong></td>
<td>Enter the external user. To enter multiple external users, separate with commas.</td>
</tr>
<tr>
<td><strong>Form name</strong></td>
<td>If you are searching for documents for a specific form name, enter the form name. If the system recognizes the form name the field will auto-fill. Use the search button ▲ to search for form names. You can select multiple form names. Selecting the “x” to the right of the form name will remove it from the list.</td>
</tr>
<tr>
<td><strong>Form type</strong></td>
<td>If you are searching for documents for a specific form type, enter the form type. If the system recognizes the form type the field will auto-fill. Use the search button ▲ to search for form types. You can select multiple form types. Selecting the “x” to the right of the form type will remove it from the list.</td>
</tr>
<tr>
<td><strong>Fulfillment Center</strong></td>
<td>If you are searching for documents for a specific fulfillment center, enter the fulfillment center. If the system recognizes the fulfillment center the field will auto-fill. Use the search button ▲ to search for fulfillment centers. You can select multiple fulfillment centers. Selecting the “x” to the right of the fulfillment center will remove it from the list.</td>
</tr>
<tr>
<td><strong>Invoice Name</strong></td>
<td>Enter the name assigned to the invoice when it was created.</td>
</tr>
<tr>
<td><strong>Invoice Number</strong></td>
<td>Enter the invoice number. To enter multiple invoice numbers, separate with commas. Selecting the “x” to the right of the number will remove it from the list.</td>
</tr>
<tr>
<td>--------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Invoice Status/Invoicing</strong></td>
<td>If you are searching for documents with a specific invoice status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Invoiced By</strong></td>
<td>Enter the name of the person who created the invoice. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td><strong>Matching Status</strong></td>
<td>If you are searching for documents with a specific matching status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Order Delivery</strong></td>
<td>If you are searching for documents with a specific order delivery status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Owner</strong></td>
<td>Enter the name of the document owner. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td><strong>Packing Slip Number</strong></td>
<td>Enter the packing slip number. To enter multiple packing slip numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Participant</strong></td>
<td>Enter the first name, last name, email or username of the document participant. A document participant would be anyone who has taken any action on the document, including a person who has simply made notes. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td><strong>Payment Status</strong></td>
<td>If you are searching for documents with a specific payment status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Prepared by</strong></td>
<td>Enter the name of the person who prepared the document. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td><strong>Prepared for</strong></td>
<td>Enter the name of the person who the document was prepared for. As you type the name the system will suggest users for you to select. You can enter multiple names. Select the “x” beside the name to remove from the search.</td>
</tr>
<tr>
<td><strong>Product Description</strong></td>
<td>If you are searching for documents that contain items with a specific product description, enter the description or keywords in this field.</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Product Flags</strong></td>
<td>If you are searching for documents that contain items with a specific product flag select the appropriate checkbox. You can select multiple product flags.</td>
</tr>
<tr>
<td><strong>Purchase Order Number</strong></td>
<td>Enter the purchase order number. To enter multiple purchase order numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Receipt Name</strong></td>
<td>Enter the name assigned to the receipt when it was created.</td>
</tr>
<tr>
<td><strong>Receipt Number</strong></td>
<td>Enter the receipt number. To enter multiple receipt numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Receipt Status</strong></td>
<td>If you are searching for documents with a specific receipt status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Requisition Name</strong></td>
<td>Enter the name assigned to the requisition when it was created.</td>
</tr>
<tr>
<td><strong>Requisition Number</strong></td>
<td>Enter the requisition number. To enter multiple requisition numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Sales Invoice Number</strong></td>
<td>Enter the sales invoice number. To enter multiple sales invoice numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Sales Order Number</strong></td>
<td>Enter the sales order number. To enter multiple sales order numbers, separate with commas.</td>
</tr>
<tr>
<td><strong>Sales Order Status</strong></td>
<td>If you are searching for documents with a specific sales order status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Shipment Status</strong></td>
<td>If you are searching for documents with a specific shipment status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Sourcing Status</strong></td>
<td>If you are searching for documents with a specific sourcing status select the appropriate checkbox. You can select multiple statuses.</td>
</tr>
<tr>
<td><strong>Supplier</strong></td>
<td>If you are searching for documents that contain items from a specific supplier, enter the supplier name. Use the search button <img src="image" alt="search" /> to search for inactive suppliers. You can select multiple departments. Selecting the &quot;x&quot; to the right of the number will remove it from the list.</td>
</tr>
</tbody>
</table>
5. Once you have entered all of your search criteria select Go. Panther Mart will return your search results.

MANAGING SEARCH RESULTS

The purpose of this lesson is to demonstrate how document search results can be sorted, viewed and refined.
**Key Concepts**

**POST SEARCH FILTERS**

Once you have completed your Simple or Advanced Search you can refine the search results using post-search filters. Post-search filters define additional criteria for the document search. Similar to the advanced search options, the post-search filtering criteria will vary based on the document type (All, Purchase Orders, Requisitions, Vouchers, or Receipts) that you initially searched for.

Available post-search filters appear to the left of the search results;

As you select the available filters, the search results are narrowed and the **Filtered by** section is updated with the chosen search criteria.

You can remove post-search filters from the **Filtered by** section. This will expand the results based on the criteria removed. In the example above, you can select remove all or deselect Pending Workflow Status.
EDIT SEARCH
Users have the ability to edit a search. Unlike filtering, which refines the search results on the results page, Edit Search allows you to begin the search again, while retaining the original search information.

VIEWING DOCUMENTS FROM SEARCH RESULTS
Documents can be viewed from the search results by clicking on the document number.

Once you have opened the document you can access other search results using the scrolling feature at the top of the screen.
You can access a specific document by using the drop-down box on the top right of the screen.

![Requisition Number(s) dropdown]

You can return to the search results by selecting the Return to Search Results link at the top left of the screen.

![Return to Search Results]

**Managing Search Results Exercises**

**FILTER A SEARCH**

The purpose of this exercise is to demonstrate how to use the post-search filters to narrow a document search results set.

**Step-by-Step**

1. After you've performed your simple or advanced search available filters will be to the left of the results. Locate and select the filter(s) you would like to apply to the results set. The filter criteria available will depend on the type of document you are searching for.
Click on the filter icon to narrow your search. Select the appropriate criteria to narrow search and press Save.
Panther Mart
Document Search and Export Guide

Or click on the link under each Filter Search Heading (i.e. Current Workflow Step, Approved By, or Department, etc.)

2. Your search results will be filtered by the selected criteria. The Filtered by section will update to reflect all search and filter criteria.

EDIT A SEARCH
The purpose of this exercise is to edit a search.

Step-by-Step
1. From the search results page select the Edit Search button.
2. You will be returned to the search page. All criteria from the initial search will be populated in the appropriate fields.
3. Enter any additional criteria and execute the search.

SAVING DOCUMENT SEARCHES
Saved search allows users to create their own folders and organize their saved searches. For example, you may want to have a supplier search folder and within that folder place all of your supplier specific searches. Saved searches can also be shared with others in your organization.

Key Concepts
CREATING A SAVED SEARCH
Saved searches are created from the search results page. When you opt to save a search you are essentially saving the search you executed to get to that results page. For example, you run a search on POs from the last 30 days that have not been invoiced. If you opt to save this search then the criteria saved in the search will be the same. It is important to note that when you execute a saved search the dates will be relative, meaning the last 30 days would be from the date of report execution vs. the date that the report was saved.

Saved searches are accessed from the saved searches tab. From this tab saved searches can be run, exported and managed.
ORGANIZING AND MANAGING SAVED SEARCHES
Saved searches are organized similarly to Favorites. Users create folders in which to store their saved searches, helping them to easily locate and manage them. Folders can be created in the saved searches tab or on the fly when saving a search.

Saved searches can also be managed from the saved searches tab. Searches can be deleted and moved/copied to another folder. Search names and descriptions can be edited. From the saved searches tab you can also add a saved search as a shortcut on your main search.

RUNNING SAVED SEARCHES
You can run your saved search from the saved searches tab or from a shortcut on your main search page if you created one. When you run a saved search, the results set will be relative to the date you executed the search as opposed to the day you saved the search.

**Saving Document Search Exercises**
**CREATE A SAVED SEARCH FOLDER**
The purpose of this exercise is to demonstrate how to create a Saved Search folder from the Saved Searches tab. Please note that you can also create a folder on the fly when saving a search. You will be presented with the option to create a new folder. If you choose to do so, you can follow the same steps as below.

**Step-by-Step**
1. In document search, select the saved searches tab.

2. Select the New button in the top left. (see illustration on next page)
3. Select the type of folder you would like to create;
   - **Top level personal folder** – this will create a new top level folder that will be available only to you. Searches saved in this folder will not be accessible by anyone else in the organization.
   - **Top level shared folder** – this will create a new top level folder that is accessible to your organization. **NOTE: Not all users will have the ability to add and manage shared folders.**
   - **Subfolder of selected folder** – this will create a subfolder of a folder that you have selected.
   
   This option will not be available if there is no folder selected.

4. Enter a name and description for the folder.

5. Select **Save**. A new folder will be added to the area you selected.

CREATE A SAVED SEARCH
The purpose of this exercise is to demonstrate how to create a saved search.

**Step-by-Step**
1. Perform a simple or advanced search using the desired search criteria.
2. Select **Save Search** from the **Filtered by** section in the top right;
3. Enter a nickname for the search.
4. Create a new folder (for more information see exercise **Creating a Saved Search Folder**) or select a folder in which to save the search.
5. The search will be saved in the selected folder.

### RUN A SAVED SEARCH
The purpose of this exercise is to demonstrate how to run a saved search.

**Step-by-Step**
1. On the saved searches tab locate the search you would like to run.
2. Select the Saved Search name or the GO button. (see illustration on next page)
3. Your search will be executed.

**CREATE AND RUN A SAVED SEARCH SHORTCUT**

The purpose of this exercise is to demonstrate how to create and run a saved search shortcut.

**Step-by-Step**

1. On the **saved searches** tab locate the search you would like to run.

2. Select the **Add Shortcut** button.

This feature will add a shortcut to run the saved search from the main search page.
3. To run the search from the shortcut select shortcut link.

4. To run an export of the saved search select the export link. For more information about search exports, please see the section Document Search Export.

EDIT A SAVED SEARCH NAME AND DESCRIPTION
The purpose of this exercise is to demonstrate how to edit the name and description of a saved search. **Note:** This feature will not edit search criteria.

**Step-by-Step**
1. Go to the saved searches tab and access the appropriate search.

2. Select the **edit** link.

3. Make the desired changes and select **Save**. The changes will be applied to the saved search.

4. To edit the name and description of multiple saved searches select the checkboxes to the right of the appropriate searches then select the edit link at the top. You can then change the information for all of the selected searches.

MOVE OR COPY A SAVED SEARCH TO ANOTHER FOLDER
The purpose of this exercise is to demonstrate how to move a saved search from one folder to another.

**Step-by-Step**
1. Go to the saved searches tab and access the appropriate search.

2. Select the **move/copy** link.
3. Select the folder that you would like to move or copy the search to.

4. Select the Move/Copy button.
   - The **Move** button will move the search to the selected folder. The search will no longer be available in the original folder.
   - The **Copy** button will copy the search to the selected folder. The search will be available in both the original and selected folders.

5. To move or copy multiple saved searches to another folder select the checkboxes to the right of the appropriate searches then select the **move/copy** link at the top. You can then move the selected searches to the desired folder.

**DELETE A SAVED SEARCH**
The purpose of this exercise is to demonstrate how to delete a saved search.

**Step-by-Step**
1. Go to the saved searches tab and access the appropriate search.
2. Select the **delete** link.
3. Click **OK** to delete the search.
4. To delete multiple saved searches select the checkboxes to the right of the appropriate searches then select the **delete** link at the top. All selected searches will be deleted.

**DOCUMENT SEARCH EXPORT**
When you perform a document search you may want to export the results for further reporting and analysis. The Document Search export feature allows you to do these exports on the fly and to schedule recurring instances of certain report types.

When you export a saved search a downloadable .csv file is created. The file is available in Document Search exports for seven days.

**Key Concepts**

**EXPORT TYPES**

**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.
**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.

**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.

**RECURRING EXPORTS**
Some document search exports can be scheduled to recur on a regular basis. A report that uses a date range of Last Month or Last Week is eligible for recurring export. When you create a recurring report it will be scheduled to run based on the date range and the day or date you create it.

**Last Month** - When you create a recurrence on a saved search with a date range of Last Month, a monthly export is created. Monthly extracts should be available on the 2nd of each month. For example, the results of a scheduled extract of all POs for the month of March will be available by April 2nd.

**Last Week** – When you create a recurrence on a saved search with a date range of Last Week a weekly scheduled extract will be created. Weekly extracts will be queued to run Sunday at 12:01 am. Depending on the number of extracts scheduled completion time may vary, but should be available no later than Monday at noon. Scheduled recurring extracts can be deleted and will expire one year from the date they were created.

**Document Search Export Exercises**
**EXPORT DATA FROM SEARCH RESULTS PAGE**
The purpose of this exercise is to do a document search export from the search results page.

**Step-by-Step**
1. Perform a document search with desired criteria.
2. In the Filtered by area select the **Export Search** button.
3. Enter a filename and description for the export.

4. Select an export type:
   - **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 transaction with history.
   **Note**: If you are exporting a search with multiple document types you must select Screen Export.

5. Select the **Submit Request** button. Your export request will be submitted.

**EXPORT DATA FROM A SAVED SEARCH**

The purpose of this exercise is to do a document search export from a saved search. When you export a saved search dates will be relative to the time you request the export vs. the date you saved the search. Meaning, if you select to export a document search that searches for the last 30 days it will be 30 days from the date of the export.

**Step-by-Step**

1. Access your saved searches in **document search > saved searches**.

2. Locate the saved search you would like to export. Select the Export button.

3. Enter a filename and description for the export.
4. Select an export type:
   - **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 transaction with history.

   Note: If you are exporting a search with multiple document types you must select Screen Export.

5. Select the Submit button. Your export request will be submitted.

**DOWNLOADING SEARCH EXPORTS**
The purpose of this exercise is to locate and download document search exports.

**Step-by-Step**
1. Access exports in **document search > exports > download exports**.

2. If there are several exports you may want to filter them to locate the export you want to download. Select **Click to filter exports**.
   - **Start Date – End Date** – Enter a date range that the export was requested.
   - **Show Company Exports** – If you have permission only to view your own exports, this check box will not be available.
   - **Show Completed Exports Only** – selecting this checkbox will remove any pending exports.

3. You can also sort your exports by the column headers:
   - **File Name** – the filename assigned when the export was created.
   - **Requester** – the user name of the requester.
   - **Description** – the description entered when the export was created.
   - **Request Date/Time** – the date/time the export was submitted.
   - **Expiration Date** – the date the export will expire.
   - **Export File Size** – the size of the export file.
   - **Export Status** – Completed or Pending.

4. Click the File Name. Select to Open or Save the file.

5. When you have downloaded the file, you can choose to remove it from the exports. Select the checkbox to the right of the export then click the Remove Selected button above the export list.
CREATE A RECURRING EXPORT
The purpose of this exercise is to create a recurring export for a saved search.

Step-by-Step
1. Locate the saved search in document search > saved searches.
2. Saved searches that are eligible for a recurring export will have a Create Recurring button. Eligible searches have a date range of “Last Week” or “Last Month.” In order for a saved search to be eligible for a recurring export it must have a date range of Last Month or Last Week.
3. Select the Create Recurring button.
4. Select an export type:
   - 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.
   Note: If you are exporting a search with multiple document types you must select Screen Export.
5. Select the Create button.
6. A saved search that is configured to have a recurring export will have a clock icon. You can delete the saved search export recurrence by selecting the Delete recurring button.
7. To review your recurring exports go to document search > exports > recurring exports.
8. You can create a new recurring export from a saved search by selecting the Create from saved search button. This will take you to your saved searches.
9. You can create a new search by selecting the Create new search button. This will take you to the main search page.
10. You can review and manage your existing recurring exports:
    - Description – the description assigned when the recurrence was created.
    - Interval – how often the export will run based on the date range in the search. Saved searches with a date range of Last Month will run monthly. Saved searches with a date range of Last Week will run weekly.
    - Schedule Create Date – the date the recurring export was created.
    - Schedule Expire Date – the date the recurring export will expire.
    - Action – Select Delete to remove the recurring export.