7.0 Working with Document Search
Target Audience: All

Documents include purchase requisitions, purchase orders, invoices, receipts and form requests. Document Search allows you to view documents based on your SciQuest role. Shoppers have access to view any carts or requisitioning they participated in (e.g. assigned a draft shopping cart). Requestors and Approvers have the ability to view orders they submitted or approved, as well as orders within their department. Administrative roles have elevated document access to accommodate the needs of their business function.

1. From the Documents icon in the Navigation Menu, go to Document Search and Search Documents.

2. Users can search the entire database for documents or can access their personal documents using the “My Document” links below. For this training, we will focus on searching All Documents.

3. From the Search Results users can view the Document Number, Document Type, Document Owner, Document Date/Time, Supplier and Document Total. Results can be filtered by Document Type, Date Range, Supplier, Department and/or Owner.

4. To view a document in greater details, select the Document Number.

5. Document details will be displayed.
7.1 View a Requisition

Target Audience: All

Submitted requisitions are all shown in a convenient place – My Requisitions or Document Search. The progress of requisitions can easily be followed from this central place. Once the requisitions have been completed, they can be removed from the My Requisitions list.

1. From the Documents icon in the Navigation Menu, go to Document Search and Search Documents.

2. Requisitions can be searched via the Requisition Document Search or My Requisitions. The general requisition document search (shown below) searches the entire database for all requisitions.

3. If you are a requester, you can search My Requisitions searches for your personal requisition submissions.

4. Select the desired requisition that should be displayed.

5. Requisition details are available.
7.2 View an Invoice
Target Audience: All (Except Shoppers)

1. From the Documents icon in the Navigation Menu, go to Document Search and Search Documents.

2. Invoices can be searched via the Invoice Document Search or My Invoices. The general requisition document search (shown below) searches the entire database for all requisitions.

3. My Invoices searches for your personal requisition submissions.

4. Select the desired invoice that should be displayed.

5. Invoice details are available.
7.3 View the Status of a Payment

Target Audience: All (Except Shoppers)

1. Repeat Steps 1-5 in Section 7.2 View and Invoice. Navigate to the General section of the Invoice Document. Pay Status is displayed below Invoice Type.
7.4 Exporting Document Searches
Target Audience: All

1. To conduct a document search, follow the guidelines provided in Section 7.1. After a search has been conducted, the results can be exported by clicking Export Search in the Search Details section.

2. You will be prompted with a Document Search Export dialogue box. Enter a File Name (required) and a description (optional), Request Export Template (required) and click Submit Request.

3. A confirmation dialogue box will appear, click the Go To Page: Download Export Files. Or users can review exported file request by going to the navigation menu located on the left, click Documents > Document Search > Download Export Files.
4. All available export files will now appear. **Click** the file name that you would like to export. Please note: *Your request may take several minutes to execute depending on the size and workload of the system.*