

Tulane University SciQuest

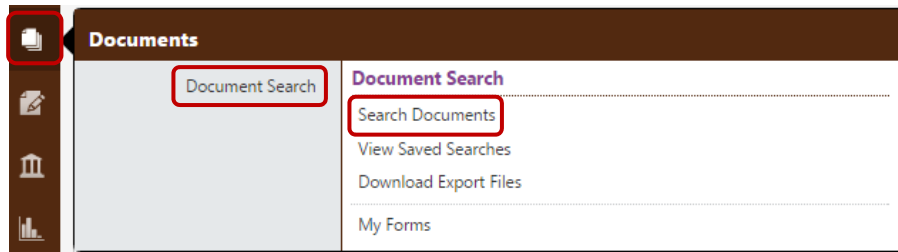
Module 7: Inquiry & Reporting

7.0 Working with Document Search

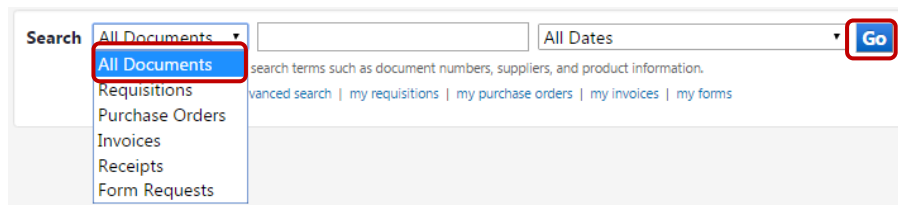
Target Audience: All

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.

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
1695793	Requisitions	Paul Tulane	10/28/2016 4:55 PM	Staples	503.82 USD
3000521	Purchase Orders	Paul Tulane	10/28/2016 3:10 PM	Staples	27.90 USD
1695771	Requisitions	Paul Tulane	10/28/2016 3:10 PM	Staples	27.90 USD
3000169	Purchase Orders	Laurence Richardson	6/23/2016 3:17 PM	Staples	2,677.20 USD
1602842	Requisitions	Laurence Richardson	6/23/2016 3:04 PM	NJUAIRE INCORPORATED	159.00 USD
1602834	Requisitions	Laurence Richardson	6/23/2016 3:04 PM	Staples	2,677.20 USD
3000166	Purchase Orders	Laurence Richardson	6/23/2016 2:54 PM	Staples	1,173.75 USD
1600382	Requisitions	Laurence Richardson	6/23/2016 2:53 PM	Staples	1,173.75 USD
6000061	Invoices	Laurence Richardson	6/21/2016 11:02 AM	Staples	6,500.00 USD
167230	Receipts	Laurence Richardson	6/21/2016 10:59 PM	Staples	
3000163	Purchase Orders	Laurence Richardson	6/21/2016 10:58 AM	Staples	6,500.00 USD
1600187	Requisitions	Laurence Richardson	6/21/2016 10:49 AM	Staples	6,500.00 USD
3000162	Purchase Orders	Laurence Richardson	6/21/2016 10:23 AM	Staples	2,265.00 USD
1600122	Requisitions	Laurence Richardson	6/21/2016 10:23 AM	Staples	2,265.00 USD
3000157	Purchase Orders	Laurence Richardson	6/20/2016 4:25 PM	LOMONTES HEATING & COOLING	125,000.00 USD
1599527	Requisitions	Laurence Richardson	6/20/2016 4:22 PM	LOMONTES HEATING & COOLING	125,000.00 USD
3000152	Purchase Orders	Laurence Richardson	6/20/2016 4:08 PM	MERCHANTS COFFEE COMPANY	1,500.00 USD
1599547	Requisitions	Laurence Richardson	6/20/2016 4:08 PM	MERCHANTS COFFEE COMPANY	1,500.00 USD
6000060	Invoices	Laurence Richardson	6/20/2016 4:00 PM	Staples	6,500.00 USD
167114	Receipts	Laurence Richardson	6/20/2016 10:59 PM	Staples	

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

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
1695793	Requisitions	Paul Tulane	10/28/2016 4:55 PM	Staples	503.82 USD
3000521	Purchase Orders	Paul Tulane	10/28/2016 3:10 PM	Staples	27.90 USD

5. Document details will be displayed.

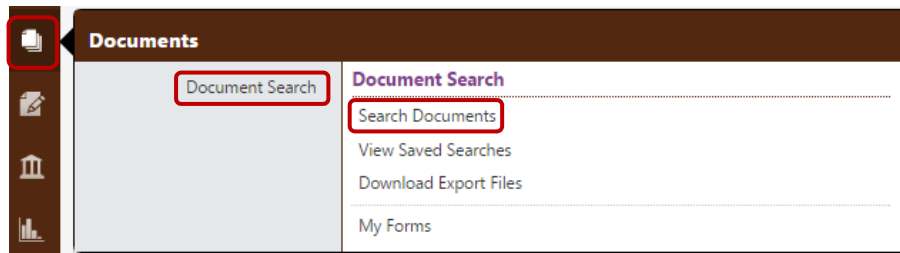
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	Supplier	Receiving	Invoicing	Matching
1 Staples Copy Paper 8-1/2" x 11" Case	135848	CT	27.90 USD	1 CT	27.90 USD	Staples	none	none	None
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.						Subtotal			27.90
						Shipping			0.00
						Handling			0.00
						Total			27.90 USD

7.1 View a Requisition

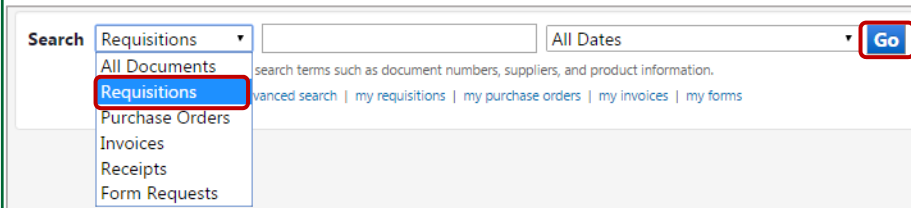
Target Audience: All

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.

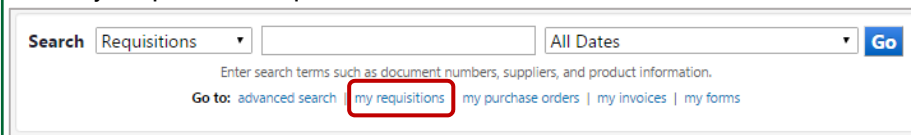
- From the Documents icon in the Navigation Menu, go to **Document Search** and **Search Documents**.



- 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.



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



- Select the desired requisition that should be displayed.

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
1695793	Staples	2016-10-28 YJACKSO 02	Paul Tulane	10/28/2016 4:55 PM	503.82 USD
1695771	Staples	2016-10-28 YJACKSO 01	Paul Tulane	10/28/2016 3:10 PM	27.90 USD

- Requisition details are available.

Requisition: 1695793
2016-10-28 YJACKSO 02

Status: Pending
Document Total: 503.82 USD

Summary

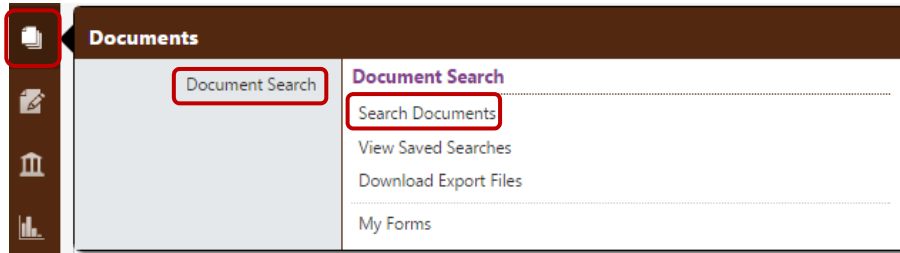
General

Status: Pending Organization Approval
Submitted: 10/28/2016 5:55 PM
Cart Name: 2016-10-28 YJACKSO 02
Description: no value
Prepared by: Paul Tulane
PO Clauses: no value
Buyer Receipt Required?: no value

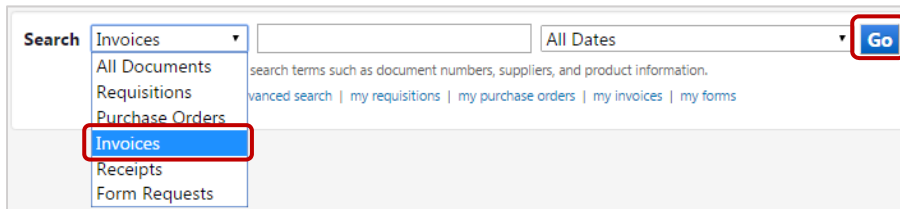
7.2 View an Invoice

Target Audience: All (Except Shoppers)

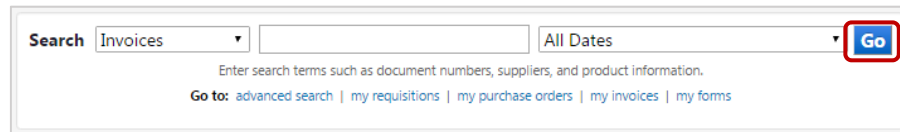
- From the Documents icon in the Navigation Menu, go to **Document Search** and **Search Documents**.



- 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.



- My Invoices** searches for your personal requisition submissions.



- Select the desired invoice that should be displayed.

Invoice No.	Supplier Invoice No.	Supplier Name	PO No.	Invoice Date/Time	Other Detail	Invoice Total
6000061	374654	Staples	3000163	Created: 6/21/2016 11:02 AM Due: 6/21/2016 Discount:	Source: Manual Type: PO Invoice Pay Payable Status:	6,500.00 USD
6000060	6895678	Staples	3000150	Created: 6/20/2016 4:00 PM Due: 6/20/2016 Discount:	Source: Manual Type: PO Invoice Pay Payable Status:	6,500.00 USD
6000056	654789	Staples	3000122	Created: 6/17/2016 7:55 AM Due: 6/17/2016 Discount:	Source: Manual Type: PO Invoice Pay Payable Status:	6,500.00 USD
6000047	123890	GUIDANCE SOFTWARE INCORPORATED	3000113	Created: 6/14/2016 2:33 PM Due: 6/14/2016 Discount:	Source: Manual Type: PO Invoice Pay Payable Status:	1,200.00 USD

- Invoice details are available.

Invoice: 6000061	Summary
<p>2016-06-21 lieblanc 01</p> <p>Supplier Invoice No: 374654 Supplier: Staples Status: Completed Document Total: 6,500.00 USD View Related Documents</p>	<p>Invoice Type: Payable Pay Status: 6000061 Invoice Number: 374654 Supplier Invoice No: Staples more info...</p>
<p>General</p> <p>Addresses</p> <p>Note/Attachments</p> <p>Payment Information</p> <p>Discount, Tax, Shipping & H...</p> <p>Accounting Codes</p>	<p>Invoice Date: 6/21/2016 Discount Date: no value Due Date: 6/21/2016 Is overridden</p> <p>Terms: 0.00 USD Terms Discount: 2016-06-21 lieblanc 01</p>
<p>Attachment Overview</p> <p>Comments</p> <p>Approvals</p>	<p>Invoiced By: Lisa Leblanc Contains substituted item(s): Invoice Source: Manual Match Status: Matched Export Date: 6/21/2016 12:09 PM</p>

7.3 View the Status of a Payment

Target Audience: All (Except Shoppers)

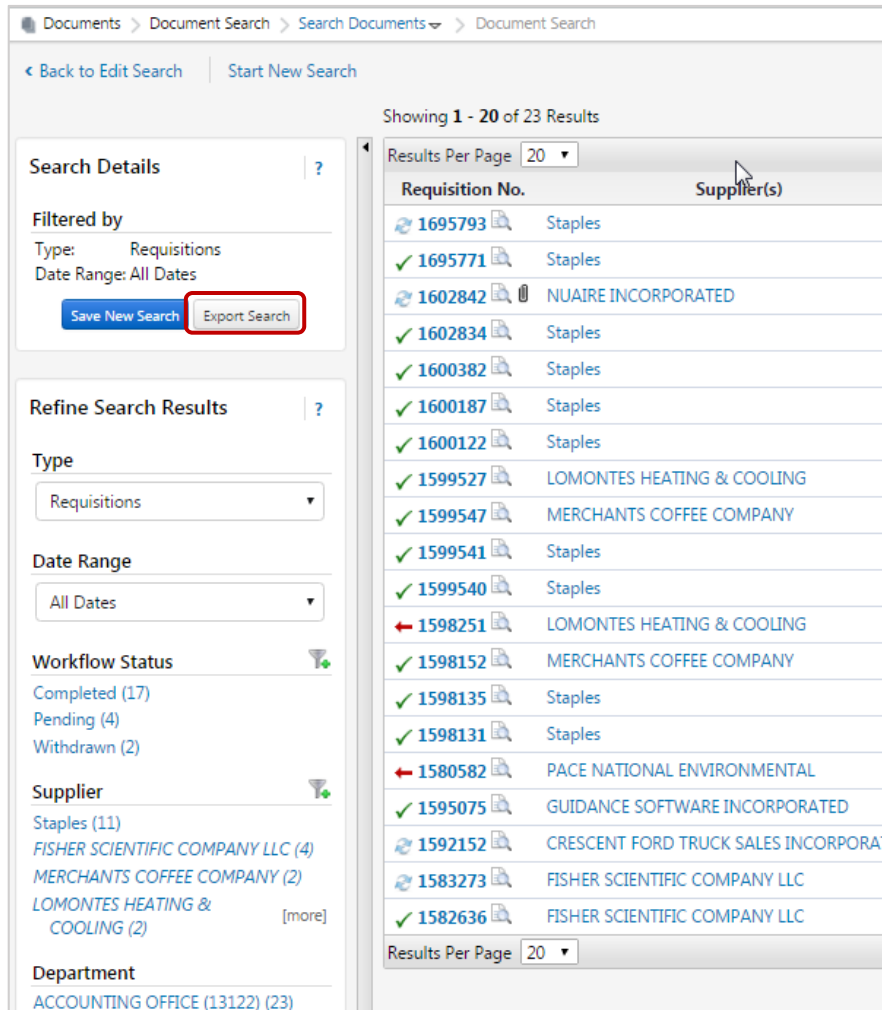
- Repeat Steps 1-5 in Section 7.2 View and Invoice. Navigate to the **General** section of the Invoice Document. Pay Status is displayed below Invoice Type.

Invoice: 6000047		General	
2016-06-14 timmeaut 03		Document Actions History ?	
Supplier Invoice No.: 123890	Supplier: GUIDANCE SOFT...	Invoice Type	Invoice
Status: Completed	Document Total: 1,200.00 USD	Pay Status	Payable
View Related Documents		Invoice Number	6000047
Invoice		Supplier Invoice No.	123890
Summary	General	Supplier Name	GUIDANCE SOFTWARE INCORPORATED more info...
Addresses	Invoice Date	Invoice Date	6/14/2016
Note/Attachments	Discount Date	Discount Date	no value
Payment Information	Due Date	Due Date	6/14/2016
Discount, Tax, Shipping & H...	Terms	Terms	0.00 USD
Accounting Codes	Terms Discount	Terms Discount	2016-06-14 timmeaut 03
Attachment Overview	Invoice Name	Invoice Name	2016-06-14 timmeaut 03
	Invoiced By	Invoiced By	Timothy Meaut
	Contains substituted item(s)	Contains substituted item(s)	x
	Invoice Source	Invoice Source	Manual
	Match Status	Match Status	Matched
	Export Date	Export Date	6/14/2016 3:34 PM

7.4 Exporting Document Searches

Target Audience: All

- 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.



Documents > Document Search > Search Documents > Document Search

< Back to Edit Search | Start New Search

Showing 1 - 20 of 23 Results

Results Per Page 20

Requisition No.	Supplier(s)
1695793	Staples
1695771	Staples
1602842	NUAIRE INCORPORATED
1602834	Staples
1600382	Staples
1600187	Staples
1600122	Staples
1599527	LOMONTES HEATING & COOLING
1599547	MERCHANTS COFFEE COMPANY
1599541	Staples
1599540	Staples
1598251	LOMONTES HEATING & COOLING
1598152	MERCHANTS COFFEE COMPANY
1598135	Staples
1598131	Staples
1580582	PACE NATIONAL ENVIRONMENTAL
1595075	GUIDANCE SOFTWARE INCORPORATED
1592152	CRESCENT FORD TRUCK SALES INCORPORAT
1583273	FISHER SCIENTIFIC COMPANY LLC
1582636	FISHER SCIENTIFIC COMPANY LLC

Results Per Page 20

Search Details

Filtered by

Type: Requisitions
Date Range: All Dates

Save New Search | **Export Search**

Refine Search Results

Type: Requisitions

Date Range: All Dates

Workflow Status

Completed (17)
Pending (4)
Withdrawn (2)

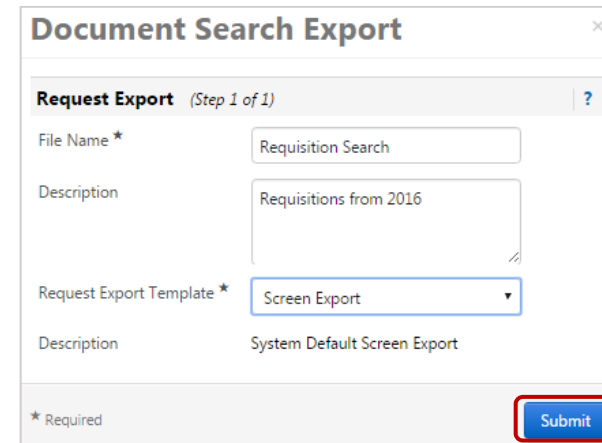
Supplier

Staples (11)
FISHER SCIENTIFIC COMPANY LLC (4)
MERCHANTS COFFEE COMPANY (2)
LOMONTES HEATING & COOLING (2) [more]

Department

ACCOUNTING OFFICE (13122) (23)

- 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**.



Document Search Export

Request Export (Step 1 of 1)

File Name * Requisition Search

Description Requisitions from 2016

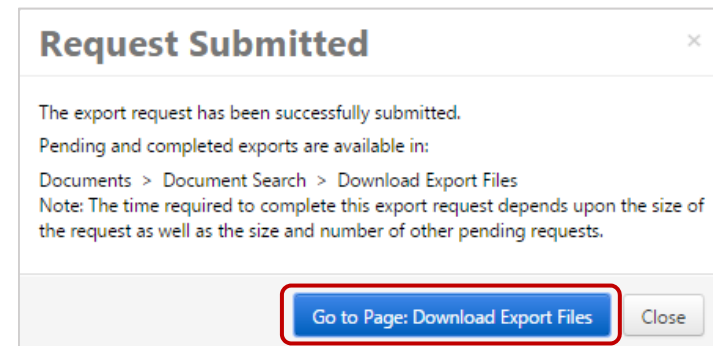
Request Export Template * Screen Export

Description System Default Screen Export

* Required

Submit

- 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**.



Request Submitted

The export request has been successfully submitted.

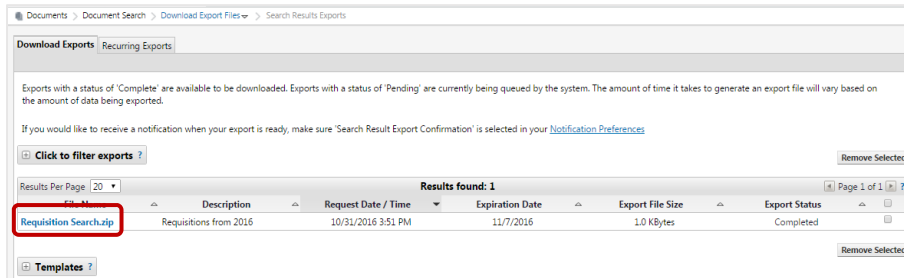
Pending and completed exports are available in:

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 Files | Close

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.*



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 ?

Description	Request Date / Time	Expiration Date	Export File Size	Export Status
Requisition Search.zip	10/31/2016 3:51 PM	11/7/2016	1.0 KBytes	Completed

Remove Selected

Templates ?