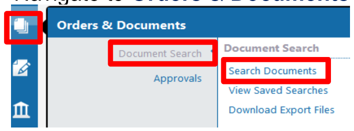
BearBuy

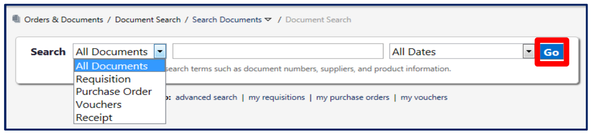
Document Search – Monitoring a Workflow Step

Navigate to Document Search ➡ Simple Search

1. Navigate to **Orders & Documents> Document Search>Search Documents**



2. In the search bar, type in the specific document number you are searching for.
3. Click **Go**.

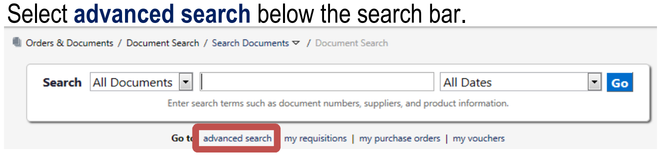


Filtering your Simple Document Search Results

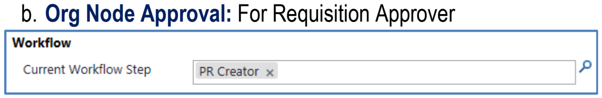
1. Use **Refine Search Results** choices to filter by criteria even further.
   a. To select multiple values for a desired filter, click the filter icon.
   b. A pop-up is shown for the criteria being filtered.
2. Select the desired values by checking the checkbox, and then click **Apply**.

Setting up a Document Search ➡ Requisition Advanced Search

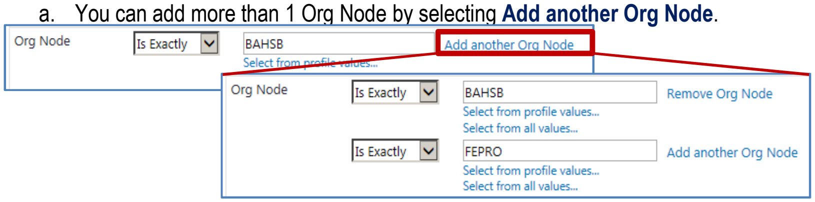
1. Navigate to **Orders & Documents> Document Search>Search Documents.**
2. Select **advanced search** below the search bar.



3. The **Search Criteria** for the drop down menu lists, **Requisitions**.
4. To pull up documents at a particular workflow step, scroll to the middle of the page to the **Workflow** Filter.
5. Within **Current Worfklow Step**, enter or select the **workflow** step you wish to search.
   a. **PR Creator:** For Requisition Creator
   b. **Org Node Approval:** For Requisition Approver



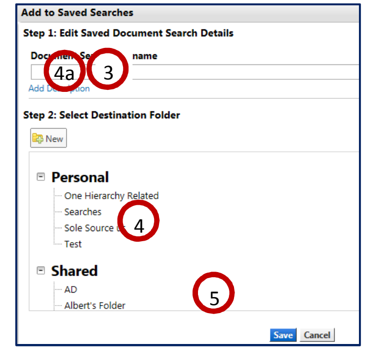
6. Navigate towards the bottom of the page and within **Custom Fields>Org Node** section, manually enter the **Org nodes** you wish to pull up.
   a. You can add more than 1 Org Node by selecting **Add another Org Node**.



7. Enter any additional custom fields filter.
8. Click **Go**.

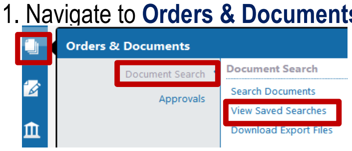
Saving a Document Search

1. From the **document search** result, navigate to **Filtered By**.
2. Select **Save Search.**
3. In the pop-out window, enter a **Document Search Nickname.**
4. Select the **Destination Folder** to save the search within.
   a. To create a **new folder**, select the **New** icon.
   b. Select either **top level personal folder** or **top level shared folder**.
   c. Enter a **Destination Folder name** and **description** if needed. Click **Save**.
5. Click **Save**.

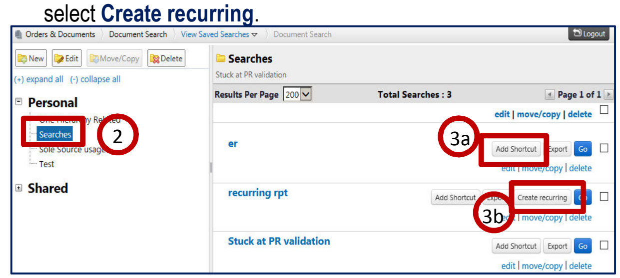


Accessing a Saved Document Search

1. Navigate to **Orders & Documents> Document Search>View Saved Searches**



2. Navigate to and select the Folder you saved your search to.
3. Select the report you wish to run.
   a. To **save** the report to the **Search Documents** landing page, select add **Shortcut**
   b. If the report is available to set up as a recurring report, you'll see **Create recurring**. To activate, select **Create recurring**.



Export a Document Search

1. From the **document search** result, navigate to **Filtered By**.
2. Select **Export Search.**
3. In the pop-out window, enter **file name** and **description.**
4. Select the export template
   a. **Screen export**
   b. **Transaction export**
   c. **Full export**
5. Select **Submit**.
6. Your export is queued up. When ready to download, it will be located within the Action Items top banner section.