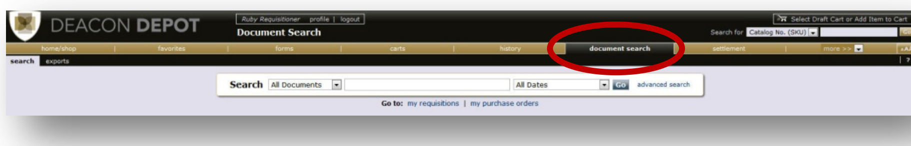
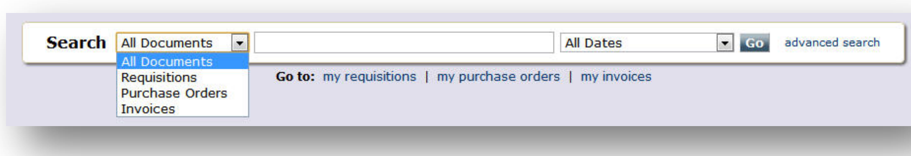
DEACON DEPOT

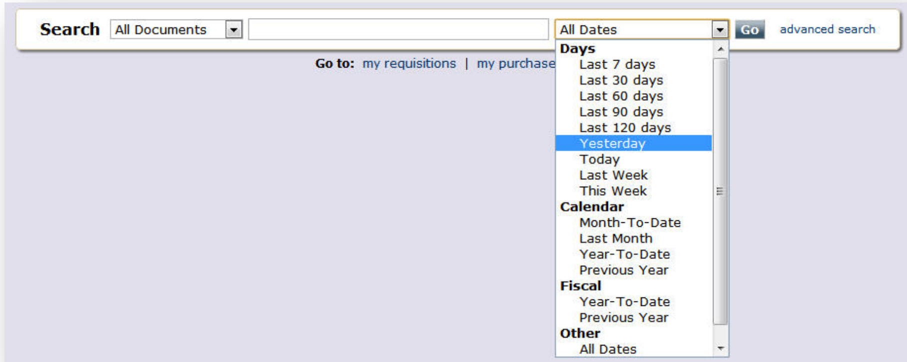
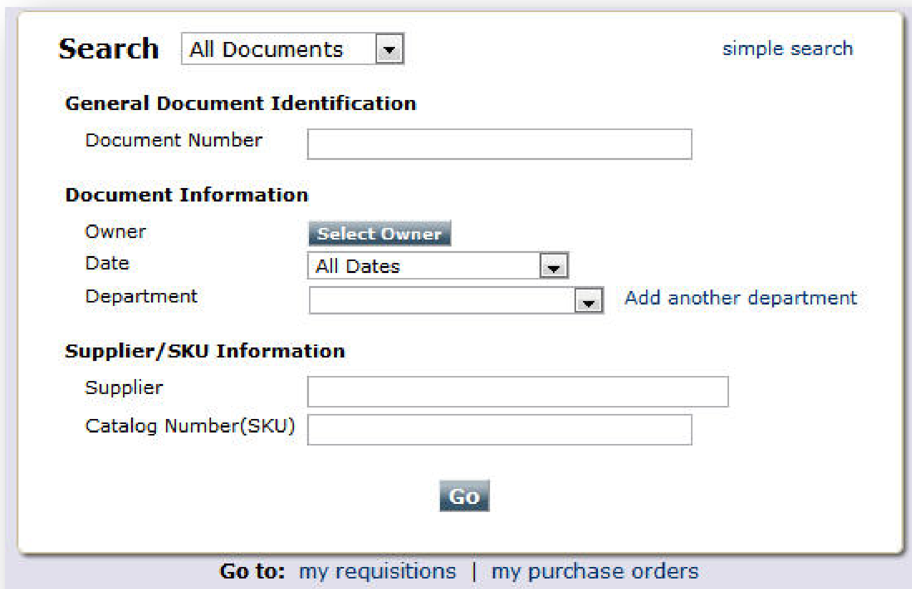
Toolbox: Document Search

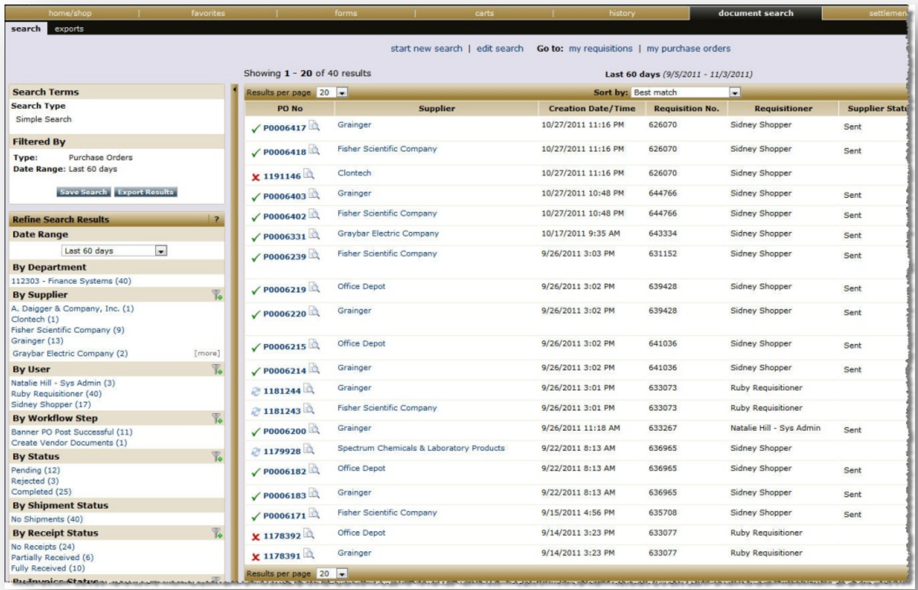
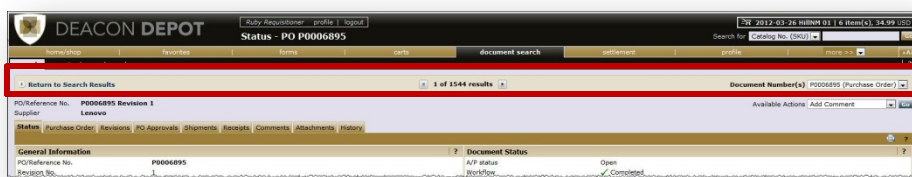
Document Search provides a simple way to search for documents, including the ability to search across multiple document types. This tool makes searching for items easier and more efficient, resulting in improved processing time.

What are Documents?
In Deacon Depot, the term *document* is used to describe the different purchasing components, including requisitions, purchase orders, receipts and invoices.

To perform a simple document search:

From the home screen, click the Document Search tab.	
Simple Search: Select to search on a specific document type or search all documents. The default is to search across all documents. Use the search box to type in any of the following information, if known: Requisition Number, Purchase Order Number, Catalog Number, Requisition Name, Supplier Name or Requisitioner Name.	

Select the date range for your search using the drop-down box. Leaving the date selection at "All Dates" will bring back information related to the document type you selected as far back as 9/1/11. Once the search criteria have been entered, click "Go".	
Advanced Document Search offers users the option to enter very specific, detailed search criteria. The search options available depend upon the document type selected. Once the search criteria have been entered, either for simple or advanced search, click "Go" to see search results. NOTE: Document Search will remember the last search performed, be it simple or advanced.	

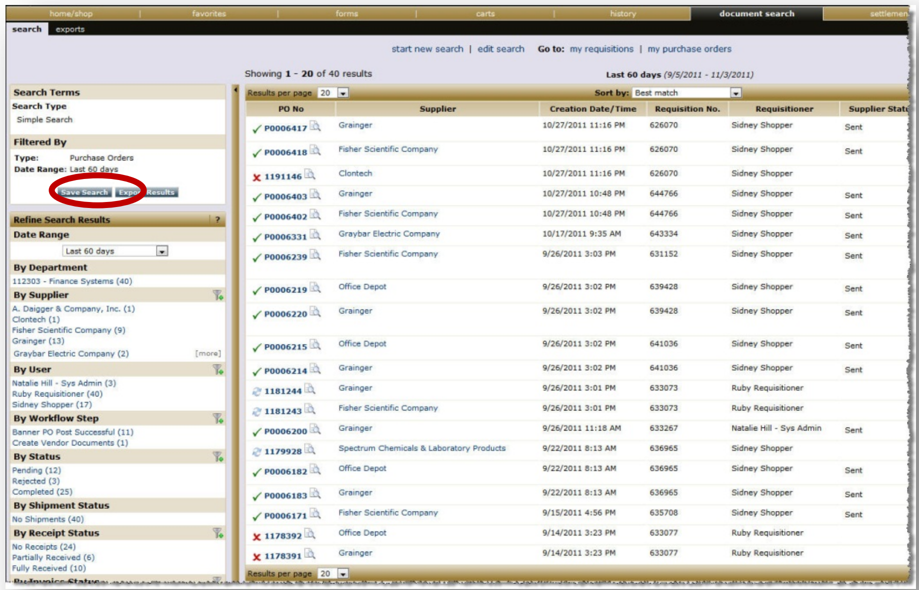
Search results will display on the next screen, with filter options available on the left, similar to a product search.	
After clicking on a document from results to view details, use the tools at the top of the screen to go back to your search results page or move between documents without having to start a new search each time.	

Other Features of Document Search:

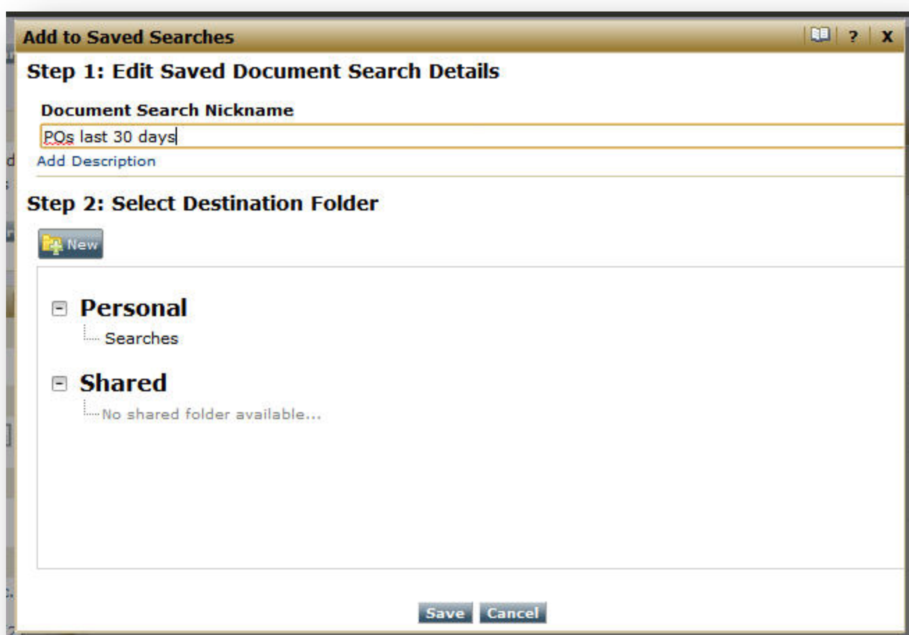
1. **Saving Searches**
   Saved searches use relevant date information. For example, if you save a search for all POs for the last 7 days, it will show exactly that, no matter what date it is executed. Saved searches are accessed through the Document Search tab, and are saved by name and description.

To save a search:

Follow the steps above to perform a Document Search. From the search results screen, click "Save Search" on the left side of the screen above the Filter options.



A pop up box similar to the Save Favorites option will display. Give your search a name and either select an existing folder to save it in or create a new folder by clicking the new button. Once the details have been completed, click "Save".



<table>
<tr>
<td>To view or manage your saved searches, click the “saved searches” sub-tab.</td>
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<td>A listing of your saved searches will display, along with options for managing those searches:

1. Add/Remove Shortcut
2. Export
3. Create/Delete Recurring</td>
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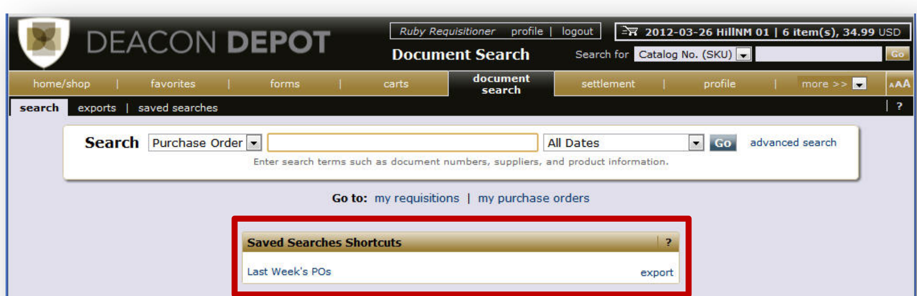
<td>Adding a shortcut places a link to your saved search on the main Document Search screen.</td>
<td>
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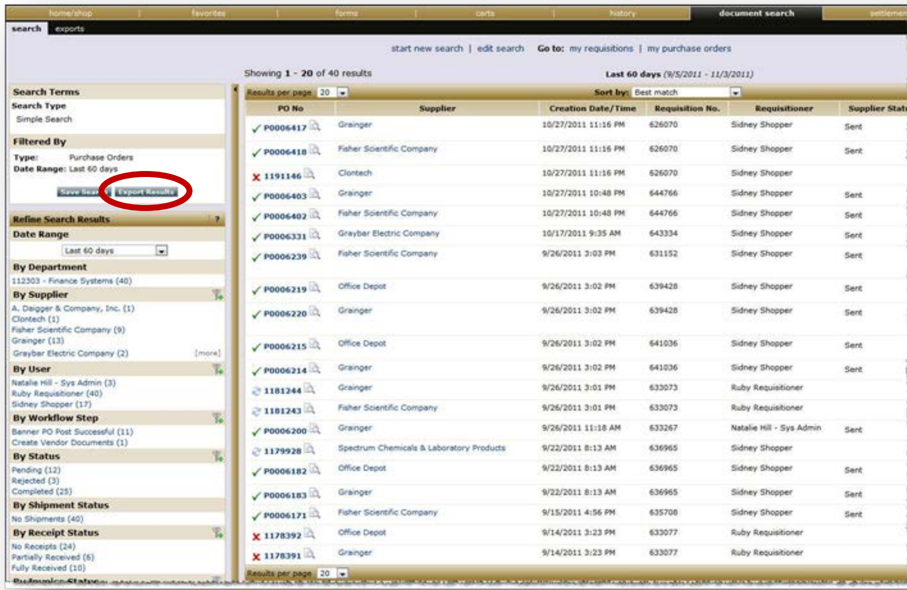
Exporting the data from your search results is available from the search results screen above the filter options or from the saved searches sub-tab. In either case, you may select from the following export options:

1. **Screen** – the search results information displayed on the screen.
2. **Transaction** – a bit more transaction detail that what is displayed on screen.
3. **Full** – all available fields.



Create/Delete Recurring Export is a new feature of Document Search. This allows users to set a recurring export for searches with the following date ranges:

- **Last Week**
- **Last Month**

For searches with one of these 2 date ranges, users can select which type of export they would like and then click “Create”.

NOTE: There is a limit of 4 recurring exports per user.

- Last Week = Saturday – Sunday and is ready by noon on Mondays.
- Last Month = Run on the first of each month and is ready by the 2nd of each month by noon.