

# Caltech




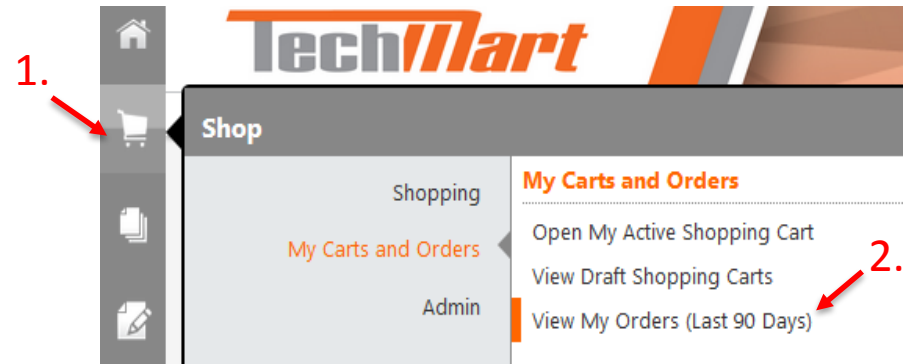
How to:

**SEARCH ORDERS**

# View Your Orders

To view your TechMart orders:

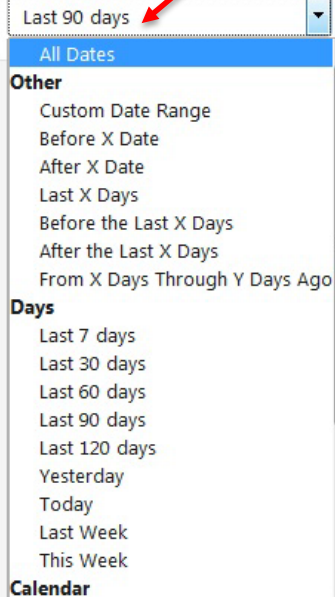
1. Click on the **Shop**  symbol from your TechMart menu bar
2. Select **View My Orders**



**Note:** You can change the date range to view your orders from **All Dates**, a **Custom Date Range**, **Last 30 days**, etc.

## Refine Search Results

### Date Range



# Document Search

Document Search

Search All Documents Document Numbers, Supplier, Product Int

Advanced Search

If you want to search for a document:

1. Go to the **Document Search** widget on the TechMart Homepage.
2. From here, you can perform a simple search or you can go to **Advanced Search** for more detailed options

*The “advanced search” allows you to search by Requisition Number, Supplier Name, Award, etc.*

Search Requisitions All Documents Requisitions Purchase Orders Form Requests

Requisition Number(s)

Requisition Name

Requisition Information

Participant(s)

Prepared By

Approved By

Date Submit Date All Dates

Total Amount

Supplier

Department

Go

simple search

# Search Results

The screenshot shows a search results interface. At the top left, there are links for '< Back to Edit Search' and 'Start New Search'. Below these is a 'Search Details' sidebar with filters for 'Type: Requisitions', 'Date Type: Submit Date', and 'Date Range: Last 7 days'. There are also buttons for 'Save New Search' and 'Export Search'. The main results area shows 'Showing 1 - 3 of 3 Results' for 'Last 7 days (2/22/2017-2/28/2017)'. It includes a table with columns for Requisition No., Supplier(s), Requisition Name, and Requisitioner. To the right is a 'Refine Search Results' sidebar with dropdowns for 'Type' (Requisitions), 'Date Range' (Last 7 days), and 'Workflow Status' (Completed (3)).

< Back to Edit Search | Start New Search

Showing 1 - 3 of 3 Results      Last 7 days (2/22/2017-2/28/2017)

Results Per Page: 100      Sort by: Best match

Requisition No.	Supplier(s)	Requisition Name	Requisitioner
✓ 85122077	OMEGA FLEX INC [PO-EXTON]	2017-02-28 csalva 01	Cynthia Salva
✓ 85099450	WENTEQ MICROWAVE CORPORATION [PO-MONROVIA]	2017-02-27 dmsilev 01	Daniel Silevitch
✓ 85041063	NORLAND PRODUCTS INC [PO-CRANBURY]	2017-02-24 ersegev 01	Eran Segev

Refine Search Results

Type: Requisitions

Date Range: Last 7 days

Workflow Status: Completed (3)

Supplier: NORLAND PRODUCTS INC [PO-CRANBURY] (1), OMEGA FLEX INC [PO-EXTON] (1), WENTEQ MICROWAVE CORPORATION [PO-MONROVIA] (1)

Department: Condensed Matter Physics (Condensed Matter Physics) (1), Physics Administration (Physics Administration) (1), No Department (1)

Prepared By: Eran Segev (1), Daniel Silevitch (1), Cynthia Salva (1)


- Documents that meet your search criteria will be displayed in the results page.  
*In this example, search results are displayed for Requisitions submitted in the Last 7 days on the Spot Buy form.*
- You can **Refine Search Results**, **Edit Search**, **Start New Search**, **Save Search** or **Export Search** from this page.

# Export Search

The screenshot illustrates the 'Export Search' process in three stages:

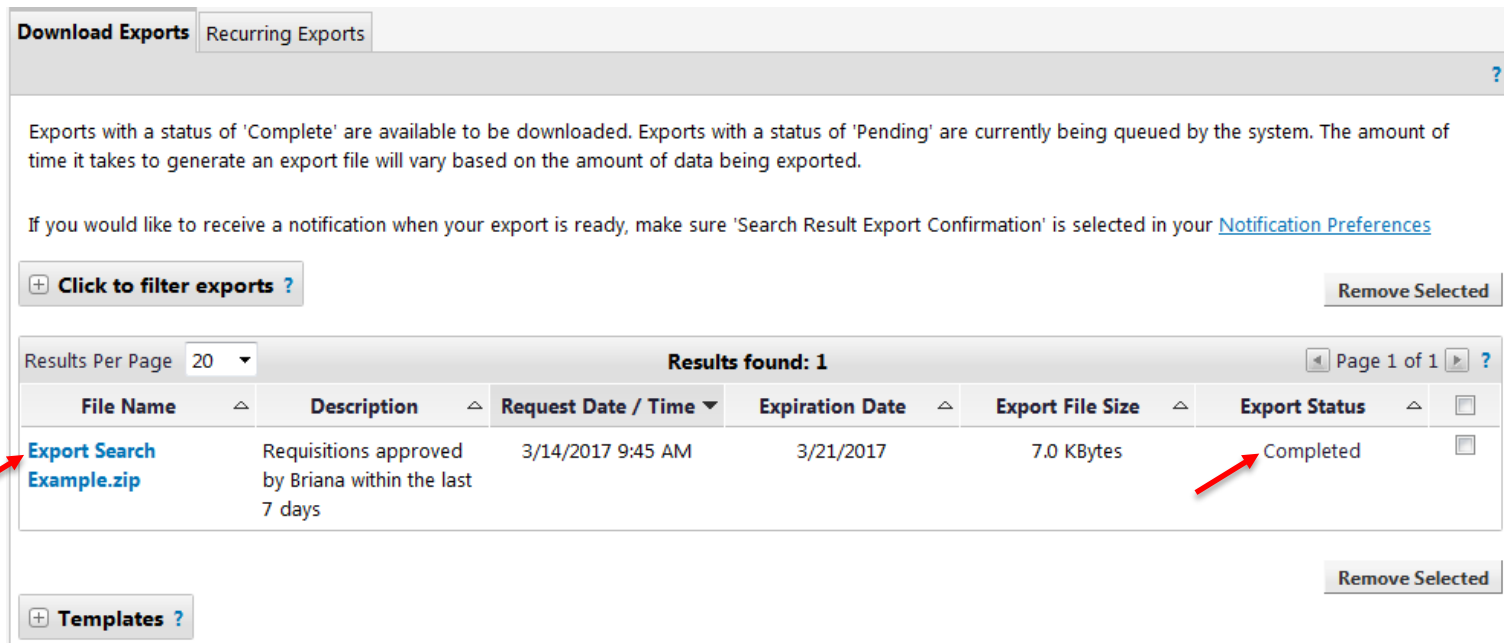
- Search Details:** Shows search filters (Type: Requisitions, Date Type: Submit Date, Date Range: Last 7 days) and the user 'Briana Nakawatase'. The 'Export Search' button is highlighted with a red arrow.
- Document Search Export (Step 1 of 1):** A form with three main fields: 'File Name' (containing 'Export Search Example'), 'Description' (containing 'Requisitions approved by Briana within the last 7 days'), and 'Request Export Template' (a dropdown menu with 'Screen Export' selected). A 'Submit' button is at the bottom right. Red arrows and numbers 1, 2, and 3 point to the 'File Name', 'Description', and 'Request Export Template' fields respectively.
- Request Submitted:** A confirmation message: '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.' A 'Go to Page: Download Export Files' button is highlighted with a red arrow.

- To export your search results to an Excel document, click **Export Search**. This will open a pop-up which asks you to (1) name your export file, (2) add a description (optional), and (3) select an export template. Click **Submit**, then **Go to Page: Download Export Files**. This will take you to a new window.

**Note:** Export files are available in the **Documents**  from your TechMart menu bar.

# Export Search Cont'd

Your exported searches will be available to download once status shows “Completed”. Click on the .zip file to export your search results to Excel.



The screenshot shows the 'Download Exports' section of a web application. It includes a header with 'Download Exports' and 'Recurring Exports' tabs. Below the header is a help icon and a paragraph explaining the export status: '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.' Below this is a link to 'Notification Preferences' and a button to 'Click to filter exports ?'. A 'Remove Selected' button is also present. The main content is a table with the following columns: File Name, Description, Request Date / Time, Expiration Date, Export File Size, and Export Status. The table contains one row with the following data: File Name: 'Export Search Example.zip', Description: 'Requisitions approved by Briana within the last 7 days', Request Date / Time: '3/14/2017 9:45 AM', Expiration Date: '3/21/2017', Export File Size: '7.0 KBytes', and Export Status: 'Completed'. Red arrows point to the file name and the 'Completed' status. Below the table is another 'Remove Selected' button and a 'Templates ?' button.

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 ?

File Name	Description	Request Date / Time	Expiration Date	Export File Size	Export Status
<a href="#">Export Search Example.zip</a>	Requisitions approved by Briana within the last 7 days	3/14/2017 9:45 AM	3/21/2017	7.0 KBytes	Completed

+ Templates ? Remove Selected

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