

# Caltech

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How to:

# SEARCH ORDERS

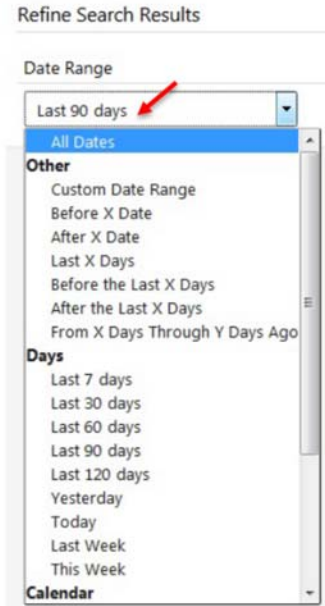
# View Your Orders

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.



# 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

Go

Requisition Number(s)

Requisition Name

Requisition Information

Participant(s)

Prepared By

Approved By

Date Submit Date All Dates

Total Amount

Supplier

Department

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 are 'Save New Search' and 'Export Search' buttons. The main content area displays a table of search results with columns for Requisition No., Supplier(s), Requisition Name, and Requisitioner. The results are filtered by 'Type: Requisitions', 'Date Type: Submit Date', and 'Date Range: Last 7 days'. The 'Form Type' is set to 'Spot Buy'. On the right side, there is a 'Refine Search Results' panel with filters for Type, Date Range, Workflow Status, Supplier, Department, and Prepared By.


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

- 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

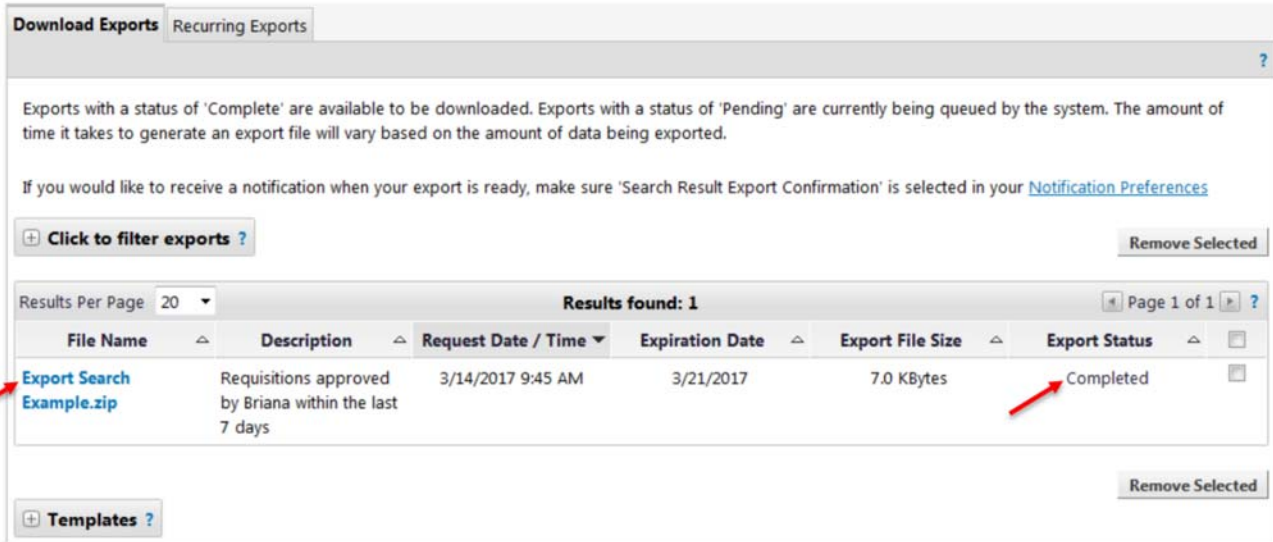
The screenshot illustrates the 'Export Search' workflow. On the left, the 'Search Details' panel shows filters for 'Type: Requisitions', 'Date Type: Submit Date', and 'Date Range: Last 7 days'. Below this, the 'Approved By' section lists 'Briana Nakawatase'. A red arrow points to the 'Export Search' button. The middle panel, 'Document Search Export', is titled 'Request Export (Step 1 of 1)'. It contains three main input areas: 'File Name \*' with the text 'Export Search Example' (labeled 1), 'Description' with the text 'Requisitions approved by Briana within the last 7 days' (labeled 2), and 'Request Export Template \*' with a dropdown menu showing 'Screen Export', 'Transaction Export', and 'Full Export' (labeled 3). A 'Submit' button is at the bottom right. The right panel, 'Request Submitted', displays a success message: 'The export request has been successfully submitted. Pending and completed exports are available in: Documents > Document Search > Download Export Files'. A note states: '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 red arrow points to the 'Go to Page: Download Export Files' button.

- 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 a web interface for managing exports. At the top, there are tabs for "Download Exports" and "Recurring Exports". Below the tabs is a help icon and a paragraph explaining that exports with a status of 'Complete' are available for download, while 'Pending' exports are being queued. A link to "Notification Preferences" is provided. There are two buttons: "+ Click to filter exports ?" and "Remove Selected". Below this 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". There are two red arrows pointing to the "Export Search Example.zip" link and the "Completed" status. At the bottom, there is a "Templates ?" button and another "Remove Selected" 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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