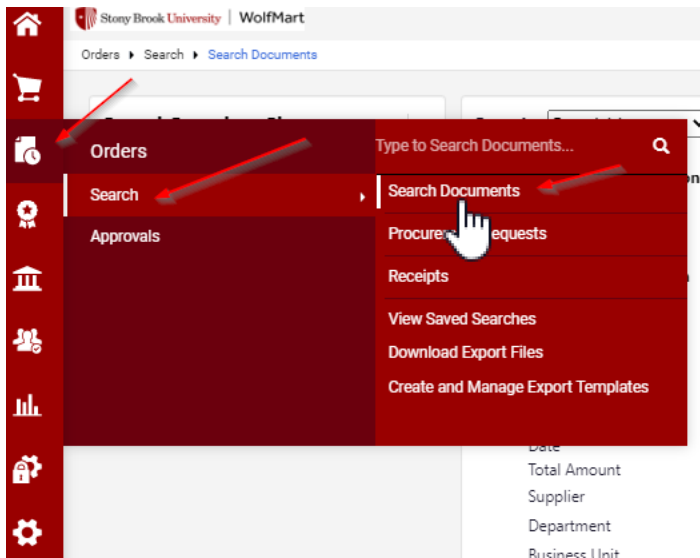


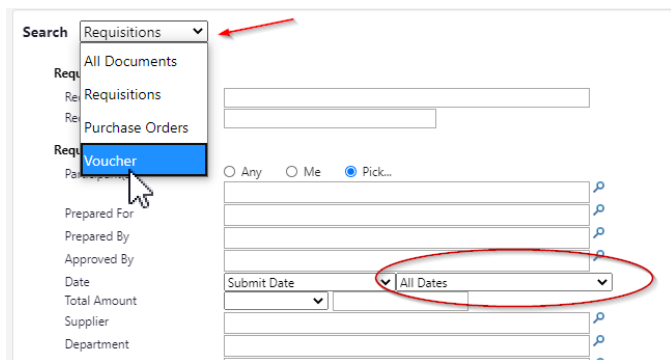
Creating & Exporting a Document Search in WolfMart

1. Go to the WolfMart homepage & from the left side navigation, click “Orders” (this icon appears as a piece of paper with a clock).
2. Select Search, then Search Documents

(Orders>Search>Search Documents)



3. From the “Search” dropdown menu, select the type of document search you need (i.e. Requisition, PO, or Voucher)

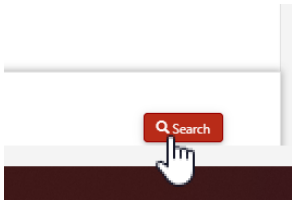


Note: You can leave the “Date” field as “All Dates” or users have the option to customize a date range (i.e. March 1 2020 – June 22 2020), should you choose to do so.

4. Scroll down to see additional Custom Field filtering options: (including, but not limited to: Account Source, Account #, Fiscal Year, Project-RF, Exp Major/Minor, etc.)

Custom Fields		
Account Source	Is Exactly	<input type="text"/> <small>Select from profile values... Select from all values...</small>
Exp Major-RF	Is Exactly	<input type="text"/> <small>Select from all values...</small>
Exp Minor-RF	Is Exactly	<input type="text"/> <small>Select from all values...</small>
Fiscal YR-SUNY	Is Exactly	<input type="text"/> <small>Select from profile values... Select from all values...</small>
Account-SUNY	Is Exactly	<input type="text"/> <small>Select from profile values... Select from all values...</small>
Project-RF	Is Exactly	<input type="text"/> <small>Select from profile values... Select from all values...</small>

5. After you have finalized selecting your search criteria, Click the Search button.



6. The search results will generate, and users will have the option to select “Export Search” to export to Excel.

Showing 1 - 500 of 1666 Results Last 30 days (b/b/2020-1/3/2020)

Results Per Page: 500 Sort by: Best match

PO No	Supplier	Creation Date/Time	Requisition No.	Requisitioner	Supplier Status	Settlement Status
✓ 376735S	Fox Rothschild LLP	7/2/2020 4:07 PM	133241051	Francis Roberts		Locked Closed Fully Invoiced Fully Matched
✓ 376734S	Fox Rothschild LLP	7/2/2020 4:06 PM	133241463	Francis Roberts		Fully Invoiced Fully Matched
✓ 376733S	Fox Rothschild LLP	7/2/2020 4:05 PM	133241221	Francis Roberts		Locked Closed Fully Invoiced Fully Matched
✓ 376732S	Hoffman and Baron LLP	7/2/2020 3:46 PM	133198739	Francis Roberts		Locked Closed Fully Invoiced Fully Matched
✓ 376731S	Scully Scott Murphy and Presser PC	7/2/2020 3:41 PM	133104983	Francis Roberts		Locked Closed Fully Invoiced Fully Matched

Search Details ?

Filtered by

Type: Purchase Orders
Date Type: Creation Date (System)
Date Range: Last 30 days

Save New Search **Export Search**

Refine Search Results ?

Type
Purchase Orders

Date Range

Search Details ?

Filtered by

Type: Voucher
Date Type: Voucher Creation Date (System)
Date Range: Last 7 days

Save New Search **Export Search**

Refine Search Results ?

7. Name the File to process export and Click Submit:

Document Search Export x

Request Export (Step 1 of 1) ?

File Name *

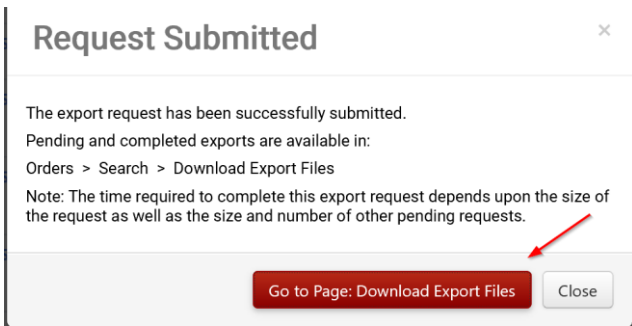
Description

Request Export Template: Screen Export

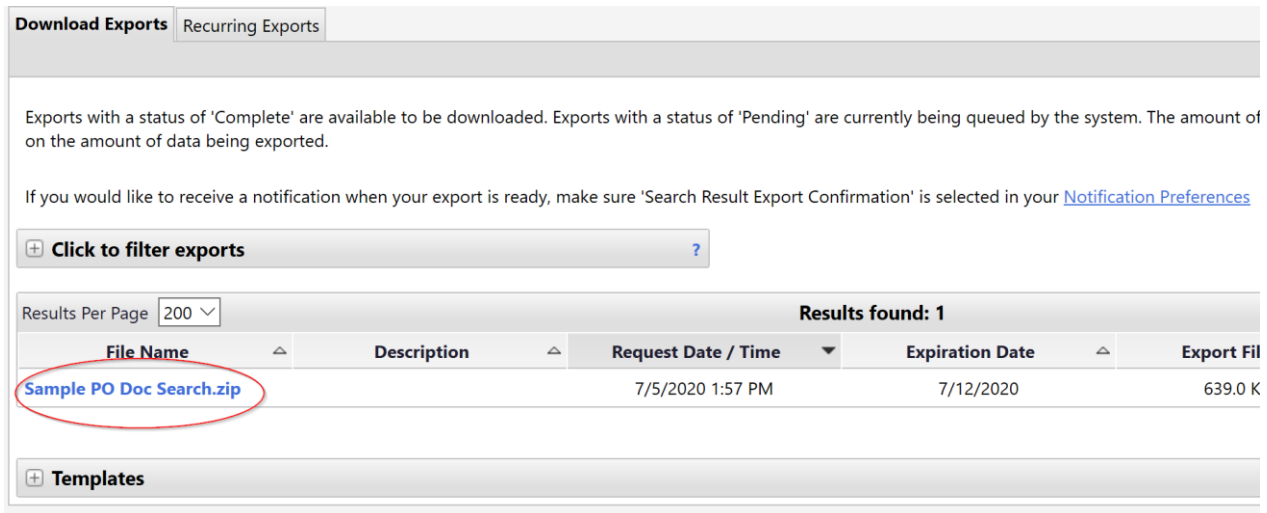
Description: System Default Screen Export

* Required **Submit**

8. Click the red button "Go to Page: Download Export Files"



9. Click the link on the file name (i.e. "Sample PO Doc Search.zip") to open and save your export.



10. Double click to open the Excel file (*if there are multiple files, choose the largest file size listed in the folder*)

<input type="checkbox"/>	Name	Type	Compressed size	Password pr...
<input checked="" type="checkbox"/>	Sample PO Doc Search	Microsoft Excel Comma Sepa...	602 KB	No
<input type="checkbox"/>	Sample PO Doc SearchFormData_	Microsoft Excel Comma Sepa...	38 KB	No

11. After opening the Excel Document, go to File > Save As and save your file export to your computer.

Follow these steps for Requisition, PO, or Voucher Document Searches. For additional questions or help, please contact the WolfMart Help Desk by email: WolfMart_Help@stonybrook.edu or by phone: (631) 632-4573.