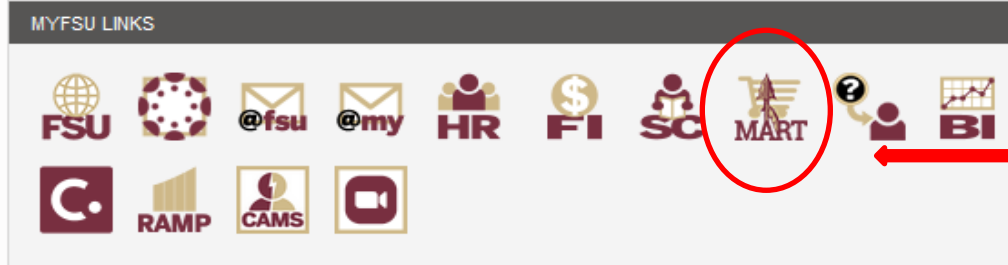**Overview**

Document Search is an extremely powerful search engine for your past or pending orders, contracts, sourcing events etc.
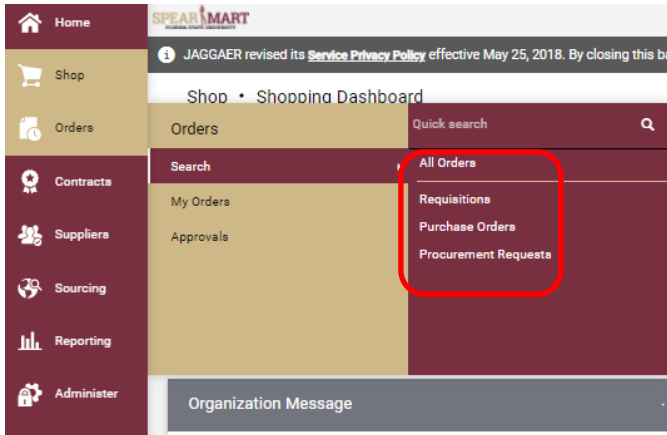
Access SpearMart by navigating to https://my.fsu.edu/ and logging in with your MyFSU username and password, and

In this Job Aid we will cover the following:

- Simple Search
- Advanced Search
- Saving a Search as a Favorite
- Exporting Search Results to MS Excel

Simple Search

- Select type of document(s) you are searching for from the left dropdown
- Select the **Date** range or enter a custom date range to in the right dropdown
- Enter the search term (supplier name etc.)

In this instance, we have chosen to search for Purchase orders and from here, you can search by "Created Date" (Make sure to click "Apply" after each update/change in your search process.)
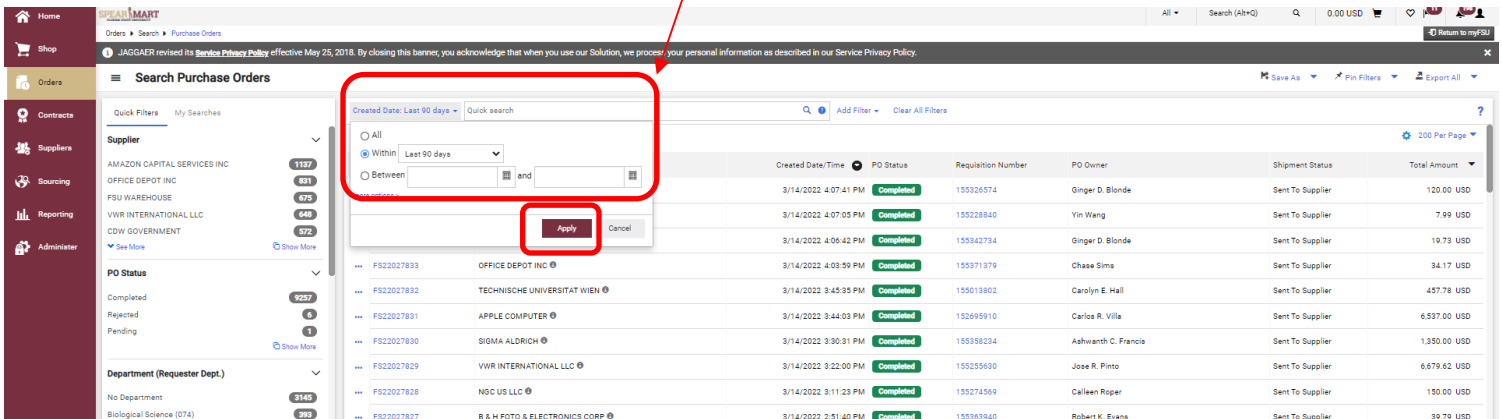
In this example, the search was for all POs within the last 90 days.

You can refine your search results by using any of the quick filters on the left-hand side of your screen OR you can add a filter.

Advanced Search

There are a number of ways to use an advanced search whether you are searching by a particular user, supplier, specific date range, one or more chart fields, $ amount, date range, commodity code, etc. In the example below, we want to see all completed requisitions to Dell Marketing, over the last 30 days, using Fund 110.

Click "Add Filter: and a drop-down filter search will appear.

Type in "fund" and then click the box in order to filter by fund code.

You can either type in the desired fund code or you can click the "+" sign to select a currently listed code, then click "Apply"

SPEAR MART
FLORIDA STATE UNIVERSITY

Add Filter ▾   **Clear All Filters**

supplier

☐ Supplier
☐ Supplier Classes
☐ Supplier Name Range

Type in "Supplier" and click the box in order to filter by Supplier.

Supplier: All ▾ ✕

| Dell | ✕ |

Advanced Syntax Help

☐ <u>Dell</u>
☐ DELL MARKETING
☐ BOOMI INC
   Doing Business As: DELL BOOMI
☐ DEWEY DELLAY

Apply   Cancel

Type in the Supplier name desired, select the check box, then click "Apply"

For the desired date range, you can search dates by "within" a certain time frame OR between a specific set of dates and then click "Apply".

Submitted Date: Last 90 days ▾   Quick search

○ All
◉ Within   Last 90 days ▾
○ Between   and

more options

Days
Last 7 days
Last 30 days
Last 60 days
Last 90 days
Last 120 days
Last 180 days
Last Week
This Week
Yesterday
Today
Calendar
Month-To-Date
Year-To-Date
Last Month
Previous Year
Fiscal
Fiscal Year-To-Date
Previous Fiscal Year

Apply   Cancel

B & H FOTO & ELECTRONICS CORP
OFFICE DEPOT INC
RESEARCH DIETS
RESEARCH DIETS
OFFICE DEPOT INC
Procurement Services

Submitted Date: Last 90 days ▾   Quick search

○ All
○ Within   Last 90 days ▾
◉ Between   and

more options >

Apply   Cancel

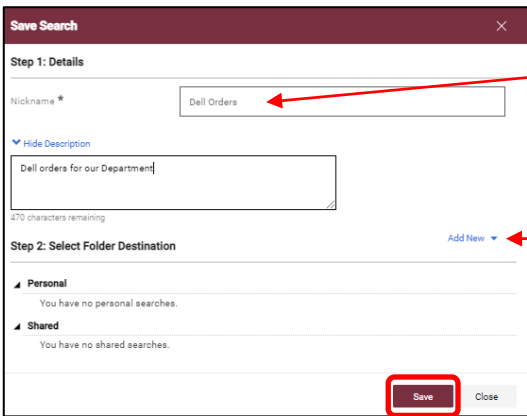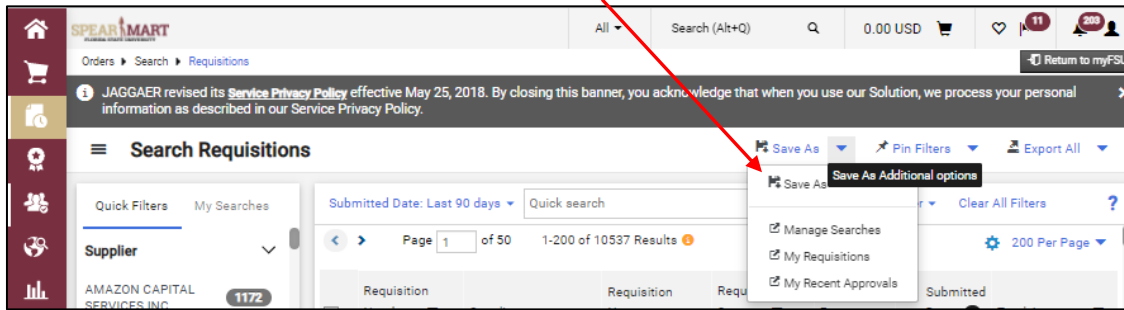Once all Filters are applied for this example, the results will show:

Saving Searches as Favorites

Continuing from our example above, click the **Save As** button on your results screen.
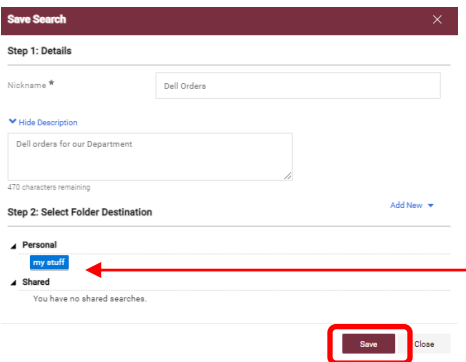

- Give your **Search** a nickname
- You can add a description if you'd like
- Click **Save** after you have filled this information in.

If you do not have a Folder under your Personal Favorites, you will need to create one by clicking **Add New.**
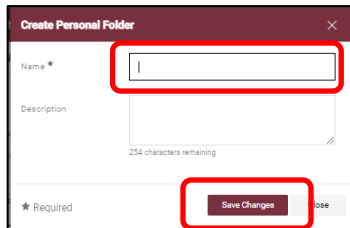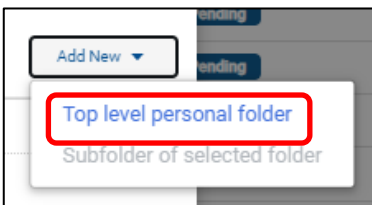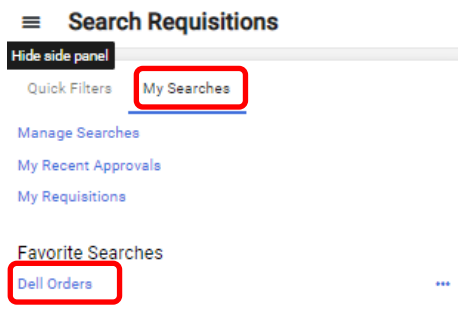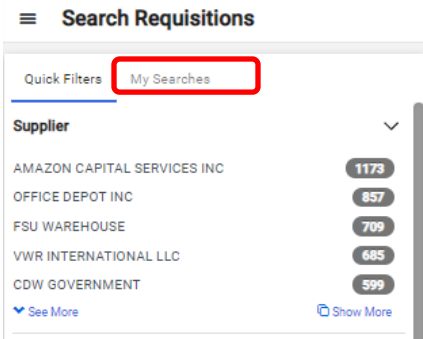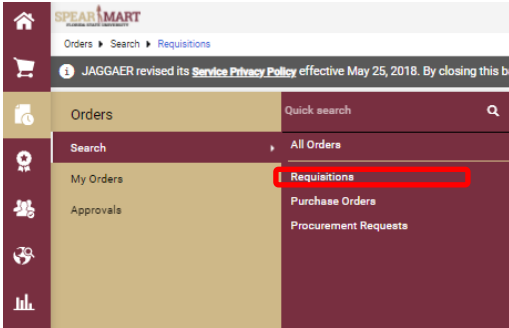

Once you click **Add New**, click on "Top level personal folder"

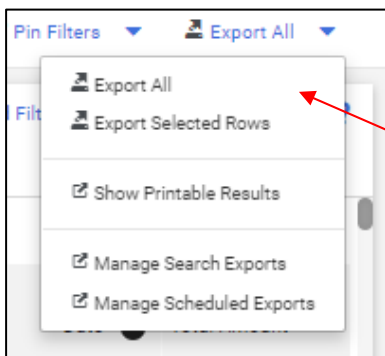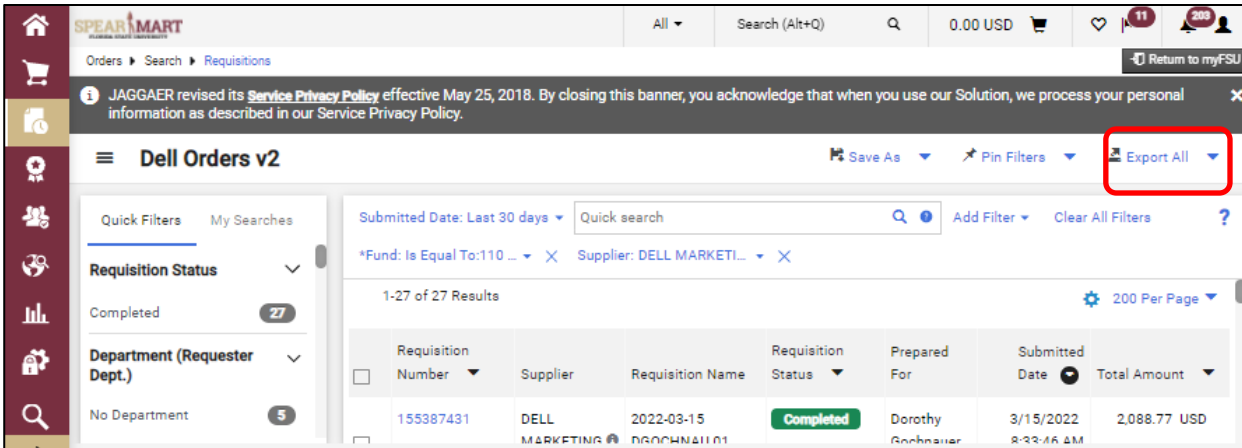Name your personal folder and click **Save Changes**

To retrieve your saved search after creating it, see below.
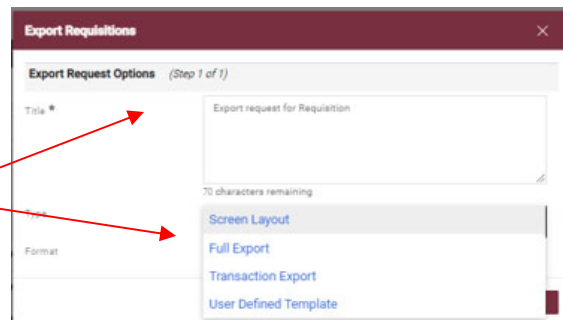

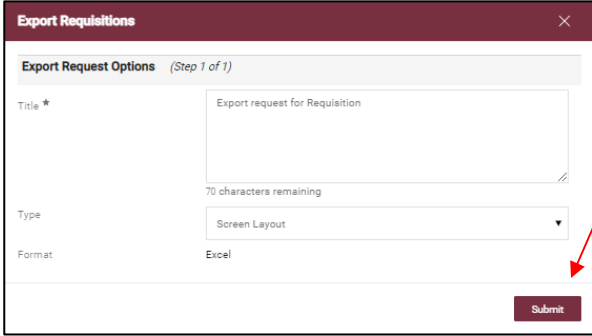## Exporting a Search to MS Excel

In this example, Johnny Tester would like to export these Requisitions from the last 30 days. He first follows the instructions from the Advanced Search Section above to view his POs from the last 30 days as shown below.

Choose the type of Export

Give your export a Title & choose the export type

SPEAR MART
FLORIDA STATE UNIVERSITY

Export Requisitions

Export Request Options *(Step 1 of 1)*

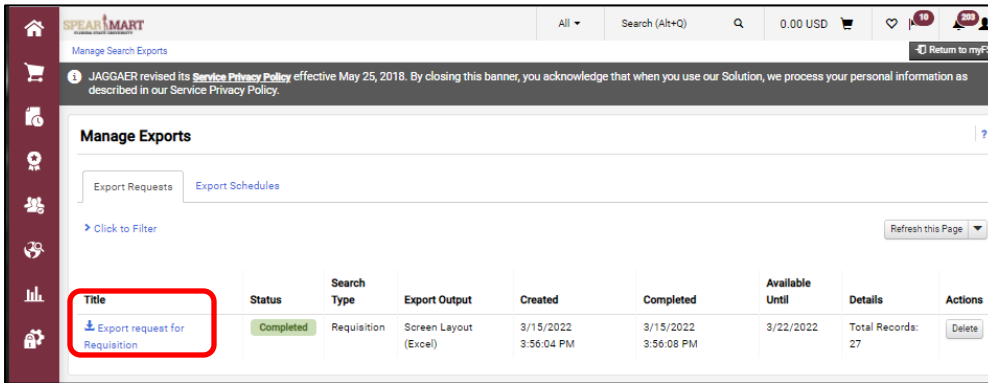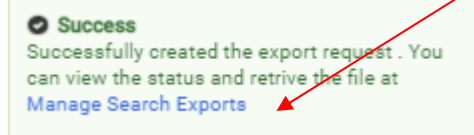Title * | Export request for Requisition

70 characters remaining

Type | Screen Layout

Format | Excel

Submit

Once Export type is selected, click **Submit**

Once submitted, click **Manage Search Exports**

✔ **Success**
Successfully created the export request . You can view the status and retrive the file at
Manage Search Exports

Manage Exports

Export Requests | Export Schedules

> Click to Filter

Refresh this Page

Title	Status	Search Type	Export Output	Created	Completed	Available Until	Details	Actions
⬇ Export request for Requisition	Completed	Requisition	Screen Layout (Excel)	3/15/2022 3:56:04 PM	3/15/2022 3:56:08 PM	3/22/2022	Total Records: 27	Delete

Click Export request for Requisition. This will open an Excel file for you to save to your computer.