



Cornell University

# **New Features in Sciquest Release 12.1 For**



**(March 25, 2012)**



## Release 12.1 New Features

- History Tab will be removed  
(Document Search replaces History Tab)
- Document Search Improvements



## History Tab will be removed

## Document Search replaces History Tab

Document Search was introduced with last release (11.3) on November 6, 2011. It was a new and much faster way of performing your history searches.

With 12.1

The History Tab will be removed and Document Search Tab will now be used for search functionality

All document types can be searched in Document Search

Document Search provides:

Two ways to search Simple Search and Advanced Search

Search for Documents through Quick Search

New flexible date range options for searching for documents

My purchase orders

Saving and re-running queries

View “Next and Previous” documents through search results



History Tab has been removed. All search are now done using the Document Search Tab

**Single entry box to search for Carts and POs**

**Link to advanced searching**



With the 12.1 release you will see the following improvements to Document Search

### New Simple Search Options

Search by user name, first name, last name, or email address

My Purchase Orders

### New Advanced Search Options

Dollar Amount – You can now select greater than, less than, or a specific dollar range within which you want to search for documents.

Product Flags–This allows you to search for or filter your search on documents that contain a specific product flag. (e.g. Radioactive, Hazardous, Recycled)

### Quick Search

### The ability to organize and save Document Searches

Users can create/manage personal folders for organizing their saved searches.

### Improved navigation between documents “Next and Previous”



You can now search by user name, first name, last name, or e-mail

Kuali Portal Index - Mozilla Firefox  
 https://kfs-prod.adminapps.cornell.edu/kfs-prod/portal.do?channelTitle=Shop Catalogs&channelUrl=b2b.do?methodToCall=  
**kuali** financial systems  
 Main Menu Maintenance Administration  
 12/14/2009 02:32 PM (Oracle9i)  
 Logged in User: mgw3  
 e-SHOP Document Search  
 Search for Catalog No. (SKU) Go  
 Search All Documents mary flaherty All Dates Go advanced search  
 Enter search terms such as document numbers, suppliers, and product information.  
 Go to: my purchase orders

2012-03-26 MGW3 01 | 0 item(s), 0.00 USD  
 Search for Catalog No. (SKU) Go  
 document search item/price profile more >> AAA

You can search just “my purchase orders”

start new search edit search  
 Showing 1 - 20 of 243 results All Dates  
 Results per page 20 Sort by: Best match Page 1 of 13  

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
✓ 49944	Purchase Order	Mary Lourdes Flaherty	1/3/2012 4:20 PM	Office Max Contract	50.31 USD
26725894	Shopping Cart	Mary Lourdes Flaherty	1/3/2012 4:17 PM	Office Max Contract	50.31 USD
✓ 47433	Purchase Order	Mary Lourdes Flaherty	12/14/2011 4:57 PM	Staples	58.24 USD
26434050	Shopping Cart	Mary Lourdes Flaherty	12/14/2011 4:56 PM	Staples	58.24 USD
26433377	Shopping Cart	Mary Lourdes Flaherty	12/12/2011 3:12 PM	Staples	64.69 USD
✓ 41875	Purchase Order	Mary Lourdes Flaherty	11/23/2011 12:00 PM	Staples	73.42 USD
25863162	Shopping Cart	Mary Lourdes Flaherty	11/14/2011 2:54 PM	Staples	73.42 USD
✓ 38355	Purchase Order	Mary Lourdes Flaherty	11/10/2011 12:19 PM	Staples	60.42 USD
25623794	Shopping Cart	Mary Lourdes Flaherty	11/10/2011 12:16 PM	Staples	60.42 USD
✓ 35926	Purchase Order	Mary Lourdes Flaherty	11/2/2011 1:51 PM	Office Max Contract	51.92 USD
25529134	Shopping Cart	Mary Lourdes Flaherty	11/2/2011 1:48 PM	Office Max Contract	51.92 USD

**Search Terms**  
 Keyword: mary flaherty  
**Filtered By**  
 Type: All Documents  
 Date Range: All Dates  
 Save Search Export Search  
**Refine Search Results**  
 Type: All Documents  
 Date Range: All Dates  
 Supplier: AAA Western and Central NY



Multiple search options

Cart or PO #'s

User names

Supplier, item,  
or department

Return to  
"simple  
search"



The screenshot shows the Kualu Portal Index interface. The search results table is as follows:

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
✓ 49944	Purchase Order	Mary Lourdes Flaherty	1/3/2012 4:20 PM	Office Max Contract	50.31 USD
26725894	Shopping Cart	Mary Lourdes Flaherty	1/3/2012 4:17 PM	Office Max Contract	50.31 USD
✓ 47433	Purchase Order	Mary Lourdes Flaherty	12/14/2011 4:57 PM	Staples	58.24 USD
26434050	Shopping Cart	Mary Lourdes Flaherty	12/14/2011 4:56 PM	Staples	58.24 USD
26433377	Shopping Cart	Mary Lourdes Flaherty	12/12/2011 3:12 PM	Staples	64.69 USD
✓ 41875	Purchase Order	Mary Lourdes Flaherty	11/23/2011 12:00 PM	Staples	73.42 USD
25863162	Shopping Cart	Mary Lourdes Flaherty	11/14/2011 2:54 PM	Staples	73.42 USD

A green arrow points to the 'Save Search' button in the 'Filtered By' section of the search results.

**Searches can be saved and executed at any time.**

Saved searches use relevant date information (instead of static dates like history searches use).

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.

NOTE: Currently, searches are only saved on a “per user” basis and cannot be shared or saved globally





Users may quickly open a summary doc from a list by clicking the “quick view” icon

The screenshot shows the Kualo Portal Index interface. At the top, there is a navigation bar with 'Main Menu', 'Maintenance', and 'Administration'. Below this is a search bar with 'Document Search' and a search input field. The main content area displays a table of search results. A magnifying glass icon is positioned over the 'Quick View' icon in the second row of the table.

Document Number	Document Type	Document Owner	Document Date/Time	Supplier	Document Total
49944	Purchase Order	Mary Lourdes Flaherty	1/3/2012 4:20 PM	Office Max Contract	50.31 USD
2672585	Shopping Cart	Mary Lourdes Flaherty	1/3/2012 4:17 PM	Office Max Contract	50.31 USD
47433	Purchase Order	Mary Lourdes Flaherty	12/14/2011 4:57 PM	Staples	58.24 USD
26434050	Shopping Cart	Mary Lourdes Flaherty	12/14/2011 4:56 PM	Staples	58.24 USD
26433377	Shopping Cart	Mary Lourdes Flaherty	12/12/2011 3:12 PM	Staples	64.69 USD
41875	Purchase Order	Mary Lourdes Flaherty	11/23/2011 12:00 PM	Staples	73.42 USD
25863162	Shopping Cart	Mary Lourdes Flaherty	11/14/2011 2:54 PM	Staples	73.42 USD
38355	Purchase Order	Mary Lourdes Flaherty	11/10/2011 12:19 PM	Staples	60.42 USD
25623794	Shopping Cart	Mary Lourdes Flaherty	11/10/2011 12:16 PM	Staples	60.42 USD
35926	Purchase Order	Mary Lourdes Flaherty	11/2/2011 1:51 PM	Office Max Contract	51.92 USD

A magnifying glass is the icon used



The screenshot shows the Kuali Portal Index interface in a Mozilla Firefox browser. The page displays a purchase order document for PO 47433. A green arrow points to the navigation arrows (left and right) next to the '3 of 243 results' indicator. The document details include:

- PO/Reference No. 47433 Revision 0
- Supplier Staples
- Status Purchase Order
- General Information: PO/Reference No. 47433, Revision No. 0, Supplier Name Staples, Purchase Order Date 12/14/2011, Total 58.24, Owner Name Mary Lourdes Flaherty, Owner Phone +1 (607) 255-5645, Owner Email mls398@cornell.edu, Owner Department G26.
- Document Status: Workflow Completed (12/14/2011 4:58 PM)
- Line Item Status table:

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	✓ Brother TZ Series Labeler Tape, TZ231, Black on White, 1/2"W x 26.2"L  more info...	486803	EA	8.03	2 EA	16.06 USD
2	✓ Dust Destroyer Duster 7oz., 4/Pack  more info...	326197	PK	14.82	1 PK	14.82 USD
3	✓ Ampad EvidenceRTM Pastel Steno Notebook, Blue, Gregg Ruling, 6" x 9", 80 Sheets  more info...	800979	EA	1.34	12 EA	16.08 USD
4	✓ StaplesRTM Invisible Tape, 1" Core, Clear, 3/4" x 1,296", 6/Pk  more info...	483535	PK	3.76	3 PK	11.28 USD

Users may advance up and down their search list from inside the document by using the “next and previous” arrows.



e-SHOP is supported by the Office for Supply Management Services

E-mail:

e-SHOP Assistance: [e-SHOP@cornell.edu](mailto:e-SHOP@cornell.edu)

General Procurement: [cusms@cornell.edu](mailto:cusms@cornell.edu)

Office for Supply Management Services: 607-255-3804

Supply Management Help Line: 607-254-5300

Training information for e-SHOP is located at :

<http://www.dfa.cornell.edu/supply/tools/training/eshoptraining.cfm>

The Supply Management Services Main page is at:

<http://www.dfa.cornell.edu/supply/>