Searching for Documents

1. To check the status of your document, you can use the Document Search options. Choose the appropriate link for the type of document you are searching.

2. On the Document Search page you can enter some search parameters. Always complete the Date Created From option, and enter a date equal to or prior to the date the document was created. The first parameter of Document Type is automatically completed from the link you selected on the main menu. The other parameters are optional. Click Search.

3. The results of your search will be displayed with one row per document.

   a. You can determine information from the search results and you can drill down to get more detail.

      a. Status – this indicates the current status of the document. Some possible statuses are:
         i. Final – document is fully approved
         ii. Enroute – document is routing through the approval chain
iii. Saved – document has been created and saved but has not yet been submitted for routing
iv. Disapproved – document was rejected by someone in the route path
v. Exception – document encountered an error during the routing
vi. Canceled – document was terminated by the initiator or someone in the route path

b. Selecting the Document Id from the search results will open the document for viewing.

<table>
<thead>
<tr>
<th>Document Id</th>
<th>Document Type</th>
<th>Title</th>
<th>Status</th>
<th>Initiator</th>
</tr>
</thead>
<tbody>
<tr>
<td>3142</td>
<td>Off-Campus Equipment Request Document</td>
<td>New Off-Campus Equipment - Create Off-Campus Equipment Authorization</td>
<td>ENROUTE</td>
<td>CAL, B, C</td>
</tr>
<tr>
<td>3062</td>
<td>Off-Campus Equipment Request Document</td>
<td>New Off-Campus Equipment - Create Off-Campus Equipment Authorization</td>
<td>ENROUTE</td>
<td>CAL, B, C</td>
</tr>
</tbody>
</table>

Export options: CSV | spreadsheet | XML

a. Click the browser “x” to close the document when you are finished viewing it.

b. Selecting the Route Log icon will display the details of the document route path, including current pending action and future actions for the document.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Title</th>
<th>Status</th>
<th>Initiator</th>
<th>Date Created</th>
<th>Route Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request Document</td>
<td>New Off-Campus Equipment - Create Off-Campus Equipment Authorization</td>
<td>ENROUTE</td>
<td>CAL, B, C</td>
<td>07/12/2012 03:55 PM</td>
<td>1</td>
</tr>
<tr>
<td>Request Document</td>
<td>New Off-Campus Equipment - Create Off-Campus Equipment Authorization</td>
<td>ENROUTE</td>
<td>CAL, B, C</td>
<td>07/09/2012 03:05 PM</td>
<td>1</td>
</tr>
</tbody>
</table>

1. The route log displays actions taken, which is the submission of the document for approval, and the pending action, which is the action the document is currently waiting on.
2. To see actions required after the current pending action, click the Show button to the right of Future Action Requests. Document actions will generally be approvals that are required, but it may also include acknowledgement or FYI actions.

Note: Document actions will generally be approvals that are required but may also include acknowledgement or FYI actions.

3. From the Route Log, use the browser back arrow to return to the Document Search results.