

# Finding your Documents in Cortex Desktop - Quick Reference



## Document Version A1

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This Quick Reference details various methods to search for, filter and locate your documents in the Cortex Desktop.

**NOTE** This Quick Reference focuses solely on the features that are useful for locating your documents in the Cortex Desktop. For more detailed information on these features, or details on other Cortex Desktop functionality, please refer to the *Cortex Desktop Feature Guide* or your *Supplier Invoicing Guide*.

You can access these training materials from the [Cortex Training and Support](http://www.cortex.net) web site ([www.cortex.net](http://www.cortex.net)).

## Filtering Your Inbox

Filtering your **Inbox** allows you to view documents of a particular type, status and/or number only.

By default, no filters are applied to your **Inbox**. You can filter your **Inbox** at any time, i.e. when there are many documents in the **Inbox**, but you are interested in working on only specific types of documents. Filtering does not affect the contents of your **Inbox**; it simply temporarily hides some of your documents and displays only those that pass the filters.

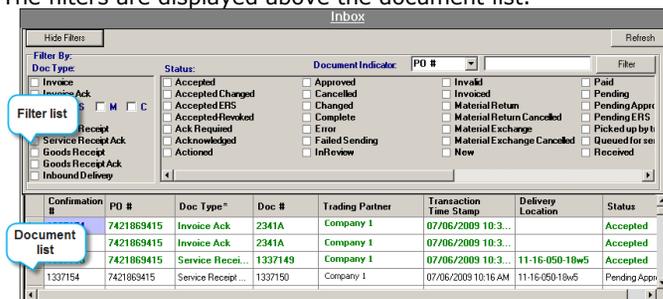
**NOTE** Filtering is available on all folders, with the exception of the **Messages** folder.

**There are two ways to search and filter the documents in your Inbox:**

- By document types and/or statuses.
- By the **Document Indicator**, or a document's specific confirmation number, document number or purchase order number.

**To filter the Inbox by document type and/or status:**

- 1 In the top left corner of the **Inbox**, click the **Search and Filter** button. The filters are displayed above the document list.



- 2 Select one or more document types in the **Doc Type** area.

- 3 Select one or more statuses in the **Status** area.

**Example:** To view Service Receipt Acknowledgments with the **Accepted** status only, select **Service Receipt Ack** under **Doc Type** and then select **Accepted** under **Status**.

- 4 Click the **Filter** button. The **Inbox** is reloaded to display documents of selected types and statuses only. To inform you that filters have been applied, the text by the filter buttons reads **"Data is currently filtered"**.

**To filter the Inbox by Document Indicator:**

- 1 In the top left corner of the **Inbox**, click the **Search and Filter** button.
- 2 Select the type of number you would like to search by in the **Document Indicator** drop down field: **Conf #**, **Doc #** or **PO #**.

- 3 Enter the appropriate number in the field to the right of the **Document Indicator** drop down.

- 4 Click the **Filter** button. The **Inbox** is reloaded to display only documents that match the criteria entered. To inform you that filters have been applied, the text by the filter buttons reads **"Data is currently filtered"**.

## Transaction History Reports

The **Transaction History** report offers various methods of finding specific documents or their subsets. In addition to defining the report's date range, you can search for documents by their type and status, or search for a specific document by its number.

**To generate a Transaction History report:**

- 1 In Cortex Desktop, click the **Reports** menu and select **Transaction History**. The empty **Transaction History** report is displayed.



- 2 In the **Date Range** area, define the report period by selecting the **Start Date** and the **End Date**.
- 3 In the **Filter By** area, select one or more **Doc Types**.
- 4 In the **Filter By** area, select one or more **Statuses**.
- 5 If you are searching for a specific document, you can search for it using the **Document Number** area. To search for a specific document:
  - a Select the type of number you would like to search by in the drop down field: **Conf #**, **Doc #** or **PO #**.
  - b Enter the appropriate number in the field.
- 6 If you are searching for specifically archived or unarchived documents, you are able to select these options from the **Archived** drop down. Select:
  - **Both**: to search for archived and unarchived documents.
  - **Yes**: to search for only archived documents.
  - **No**: to search for only unarchived documents.

**NOTE** You are able to combine these search methods to refine your report, i.e. by searching for a specific document number or purchase order number with only certain statuses.

- 7 Click the **Get Transactions** button. Documents that match the entered criteria are displayed in the Preview pane.
- 8 If you wish to print the report, click the **Print** button, then in the window that opens click the **File** menu and select **Print**.

**NOTE** You are able to export the **Transaction History** report to an Excel spreadsheet that you can view, manipulate, save and print. For more details, refer to the *Cortex Desktop Feature Guide* on the [Cortex Training and Support](http://www.cortex.net) web site ([www.cortex.net](http://www.cortex.net)).

## Archiving and Restoring Archived Documents

The archiving feature in Cortex Desktop allows you to clear your **Inbox** and other folders of fully processed documents and helps you focus on documents that require your attention and action.

### To manually archive documents from one of your folders:

- 1 Right-click the document in your Cortex **Inbox** and select **Archive**.
- 2 In the **Archive** window, click **Yes**. The document is moved from the **Inbox** to the Cortex archive.

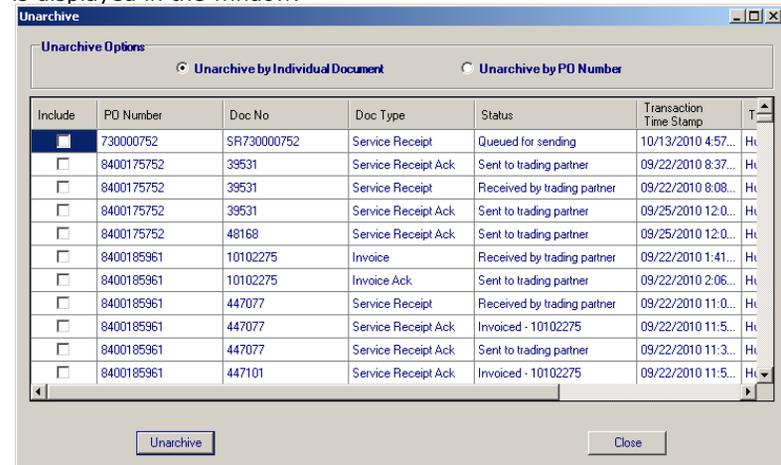
## Restoring Archived Documents

Archived documents are stored in the Cortex archive for six months. While the documents are in the archive, you can restore them back at any time. For example, restore documents if their processing has not been completed, or if you need to create other documents from them.

**NOTE** To restore documents archived more than six months ago, contact Cortex.

### To restore archived documents:

- 1 From the **Tools** menu, select **Archiving/Unarchiving** and then click **Unarchive Transactions**. The **Unarchive** window is displayed. By default, the **Unarchive by Individual Document** option is selected, and a list of all archived documents is displayed in the window.



- 2 If you want to unarchive all documents associated with one or more POs, under **Unarchive Options**, select **Unarchive by PO Number**. A list of POs with archived documents is displayed.
- 3 In the list, locate the documents to unarchive and select their check boxes in the **Include** column.
- 4 Click **Unarchive**. The selected documents are restored, and a confirmation message is displayed.
- 5 Click the **OK** button.
- 6 To reflect your changes in the application, click **Refresh**. The **Inbox** reloads, and the restored documents are displayed.