**Document Search**

**Purpose:** To define procedures for Searching Documents (I.E. Requisitions, Purchase Orders, Forms, and Invoices)

**Navigation:** Documents > Search Documents

**Notes:** There are multiple ways to search and export results

<table>
<thead>
<tr>
<th>Steps</th>
<th>Section Header</th>
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<tbody>
<tr>
<td>1</td>
<td>Flyout Document Search</td>
</tr>
<tr>
<td></td>
<td>Clicking or Hovering over the Documents hyperlink will cause the documents flyout to appear.</td>
</tr>
<tr>
<td>1.1</td>
<td>Type the search information into the <em>Type to Search Documents</em> field located in the top right corner of the flyout.</td>
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<tr>
<td>1.2</td>
<td>After Clicking on it, you will see what types of items are in need of review. The items that appear will vary based on your roles &amp; permissions.</td>
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<table>
<thead>
<tr>
<th>2</th>
<th>Simple Document Search</th>
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<tbody>
<tr>
<td>2.1</td>
<td>Click on the Document Search hyperlink.</td>
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</table>
2.2 The following is the view of a simple search. You can search by all documents or specific types of documents. The text field in the middle is the keyword search field. And lastly is the ability to search by All Dates or a date range.

2.3 Clicking Go will bring up the results. This is what the results look like from a Search.
### Advanced Document Search

3.1 The advanced search feature on the Document Search allows you to search by specific characteristics. Just click on the advanced search hyperlink.

3.2 After clicking the Advanced Search hyperlink, click on the All Documents dropdown to choose which type document you want to search in detail by.

3.3 You can always go back to the simple search by clicking on the simple search hyperlink in the top right corner.
3.3 Advanced Search allows you to search by many different things. The second way to assign to yourself is click the checkbox next to assign and then click the dropdown in the top right corner and select assign. And then clicking Go. This will assign it directly to yourself. Using this method, you can assign multiple items to yourself in one step.

3.4 When doing a search, the search parameters will display in the Filter by section in your results on the left side.
3.5 You can drill down more into your search results by using the Refine Search Results Section. Clicking the search filter cone circled in yellow will allow you to choose the additional parameters to narrow your search by. The parameters selected will show update and show in the Filtered by Section of this page.

4 Save a Searches and Saved Search folders

4.1 All search results can be saved for later use or added to your dashboard for quick and easy use.
Document Search

4.2 After clicking the Save New Search button, the following pop-up window emerges.

4.3 Name the search and give it a brief description. It must be added to a personal folder or a shared folder. To create a new folder, click the Add New hyperlink.

5.1 After saving a search there are two main ways to access and manage the saved search.
5.2 Clicking or Hovering over the Documents hyperlink click on the View Saved Searches hyperlink.

5.3 From this page, you can add a Personal folder, Shared folder, and Subfolder.

5.4 In addition, a saved search can be edited, deleted, or copied/moved to another folder.
5.5 Also on this page. You can add/remove a saved search to the Shortcuts.

5.6 Saved shortcuts appear to the left of the search bar on the Document Search page. From here we can click directly into the saved search or export the results.

5.7 This is the view of the shortcut search results.
## Export Search Results

6.1 Furthermore, all searches can be exported. Regardless if they are saved or not saved. Clicking or Hovering over the Documents link will cause the documents flyout to appear. Click on the Download Export Files hyperlink to go to the Search exports results page.

![Image](image_url)

6.2 This is the view of the Search export results page. All results export as a zipfile.

![Image](image_url)

6.3 Recurring exports can be setup as well.

6.4 The following below is how to create the export from the saved search section page.
6.5 When creating export search results, you must give it a name and choose the export template type. (Not all search export features are available to all users.)

6.6 There are three types of export template types: Screen Export, Transaction Export, and Full Export. (All of the result types, export as zip file)

- **Screen Export**: This exports your exact search results in an Excel format. (Recommended)
- **Transaction Export**: This exports header level and line level information in an unstructured format.
- **Full Export**: This exports all of the results associated with your search results. (Do Not Recommend.) This is a substantial amount of unsorted and unstructured data.

6.7 **FAST (PeopleSoft) will still serve as the system of record.** Therefore, most data is still able to be searched through queries or in FinanceMART.