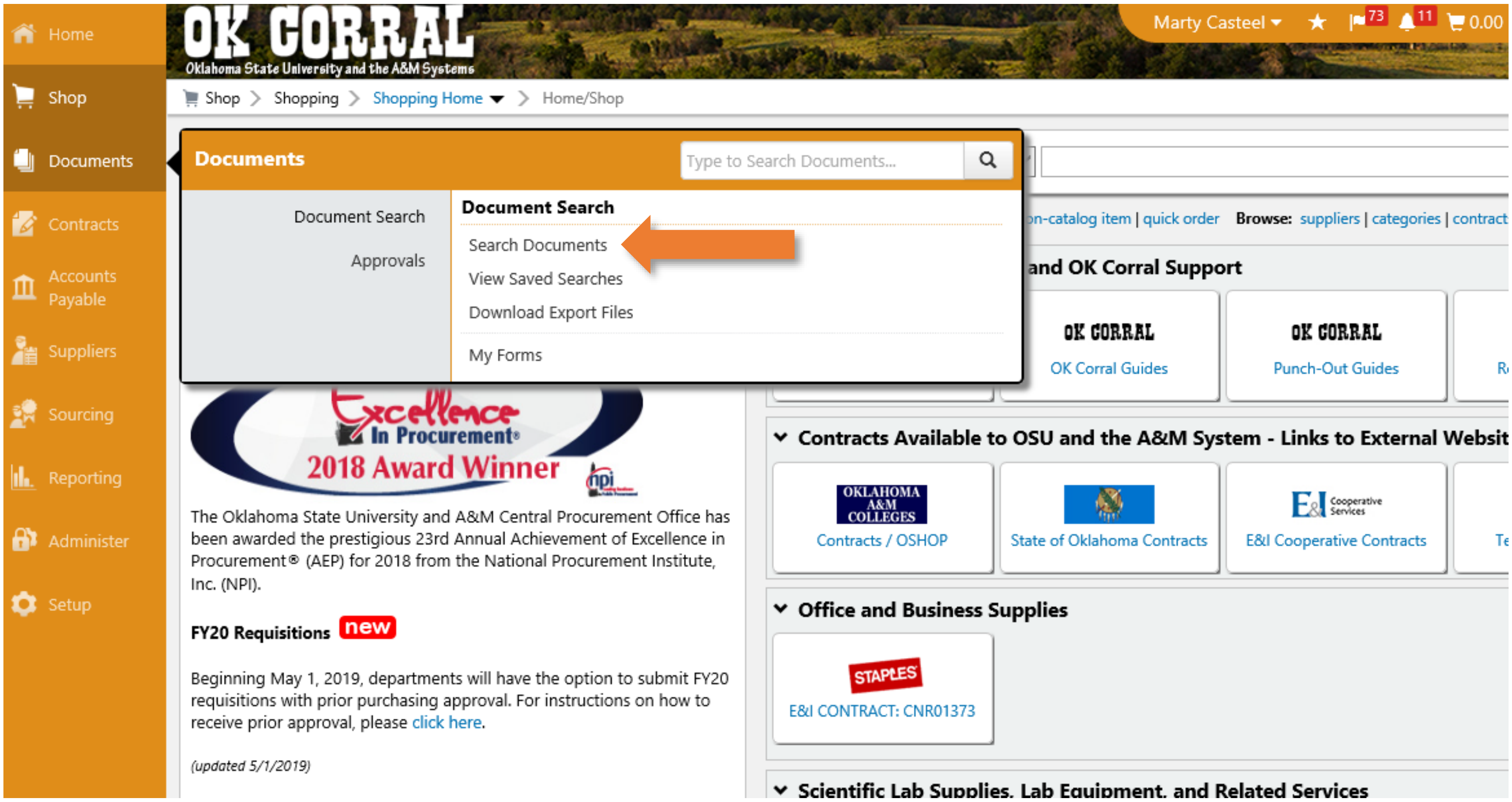
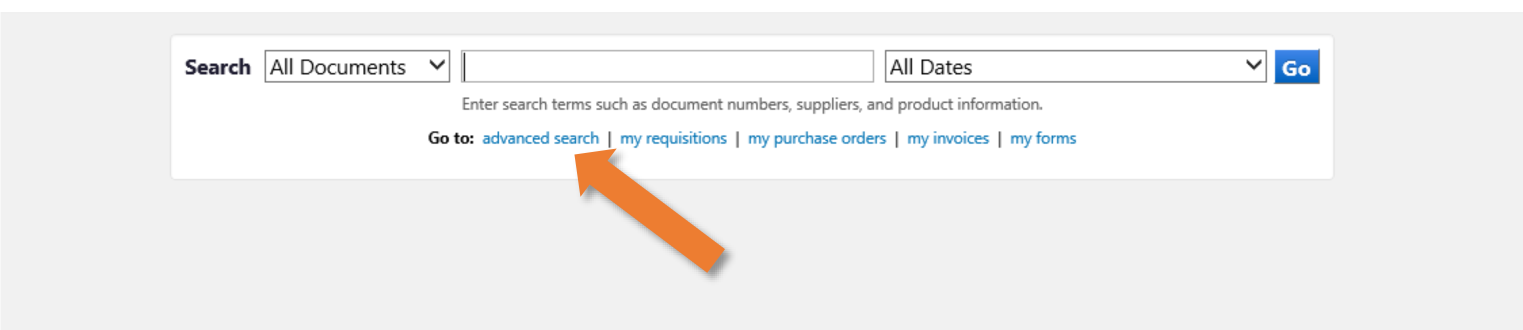
Document Search Guide

1. Hover your mouse pointer over the stack of papers 

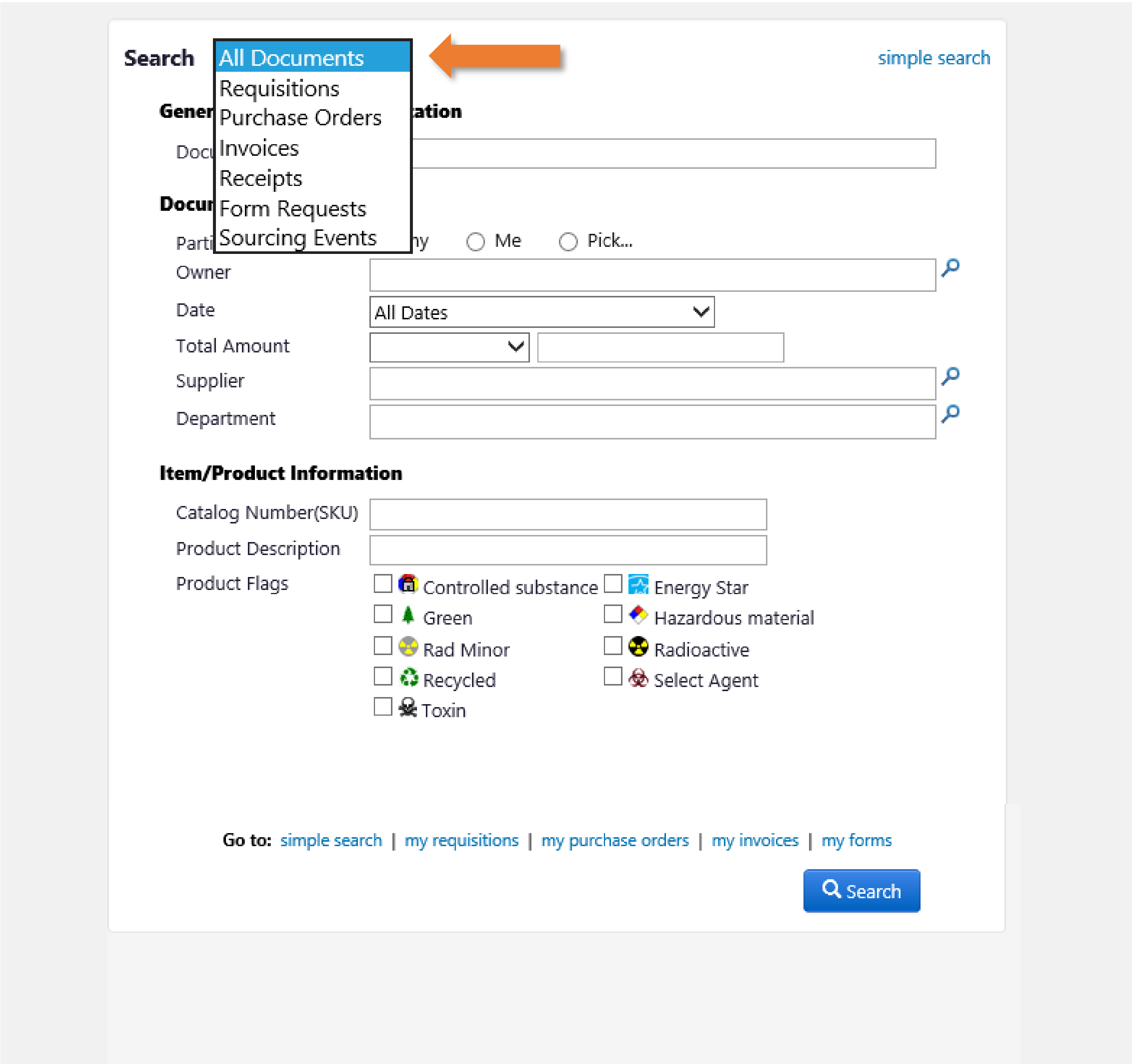
and when the menu pops up click on Search Documents.



2. If your Search Documents comes up in “simple search” like below all you must do is click on “advanced search” in the “Go to:” section below the search bar.

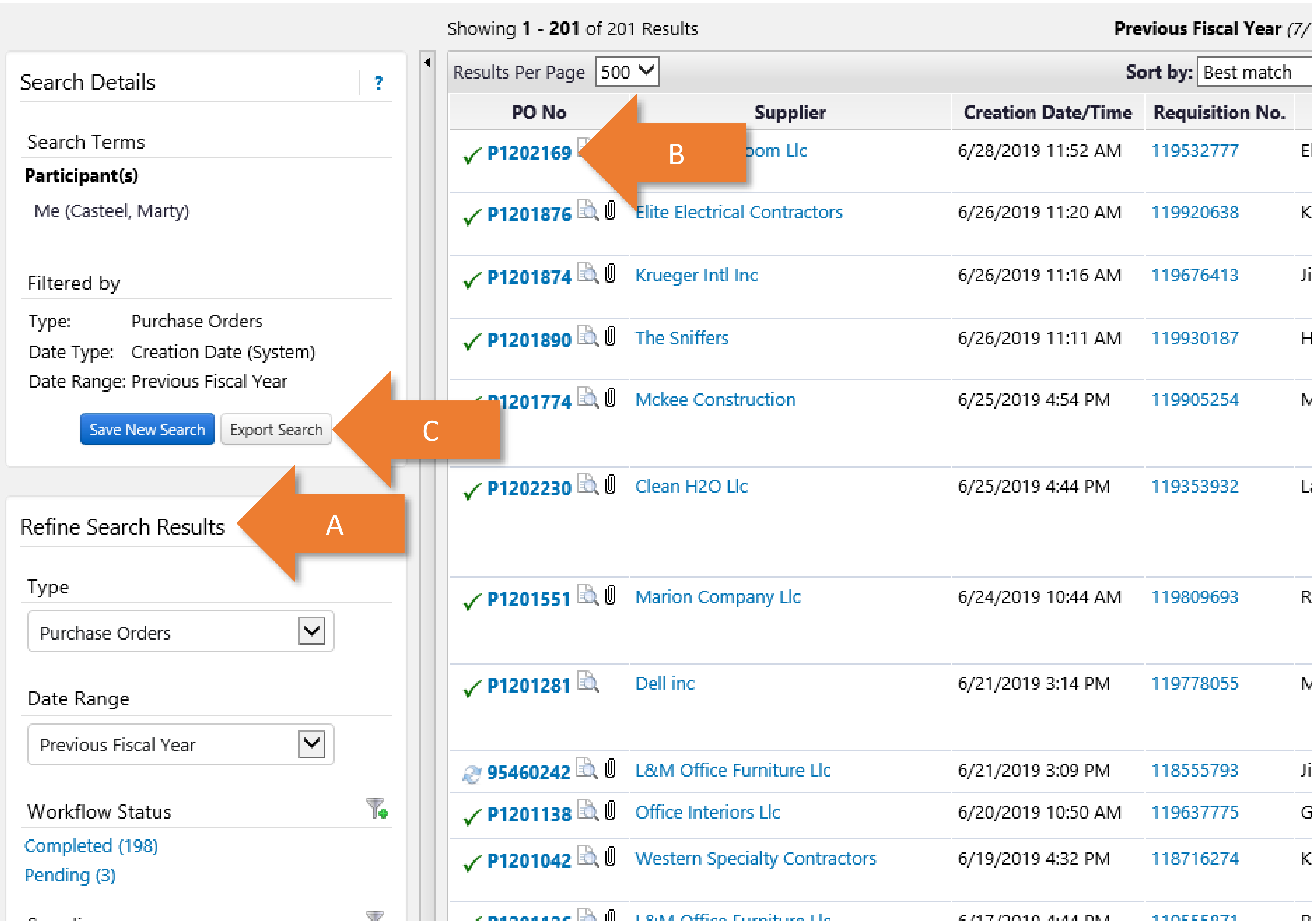


3. You can click the drop-down menu next to “Search” to select the documents you would like to search for.

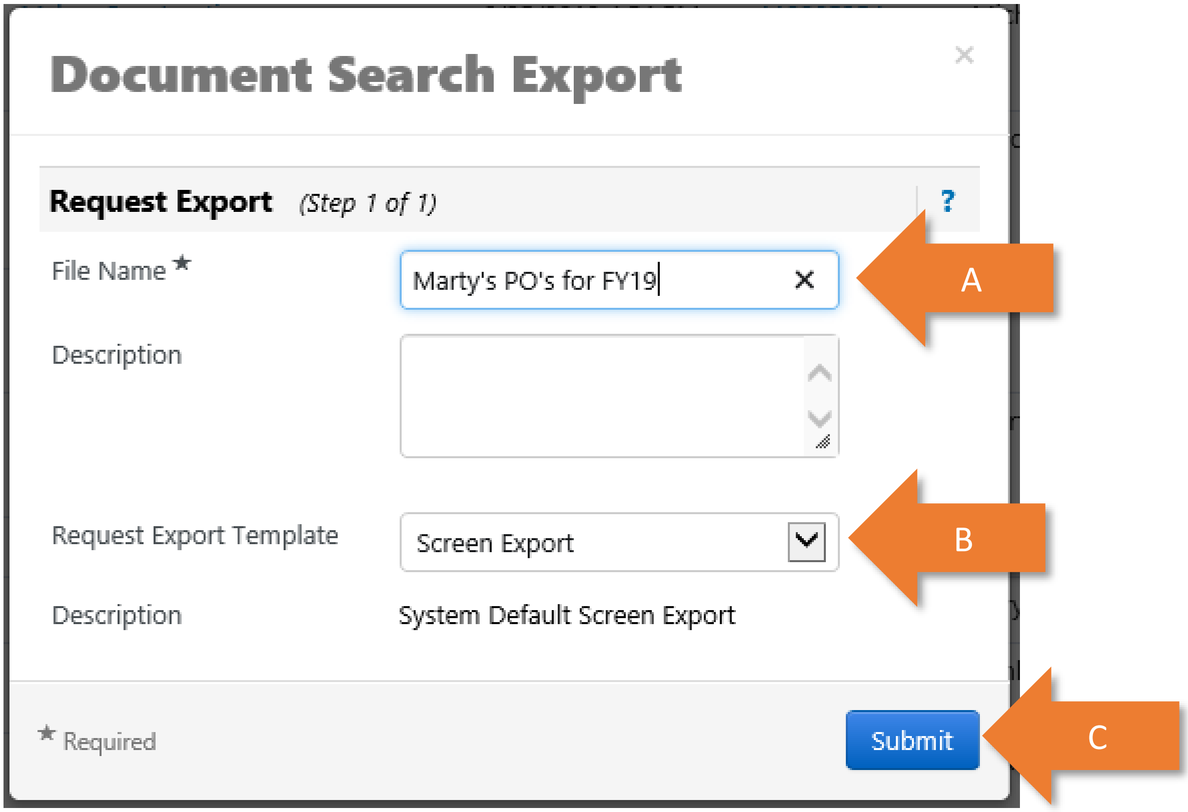


4. Once you select the type of document you would like to search for you can narrow your search by completing any of the information/criteria in any of the fields available. *Note: Please do not run a search without any criteria, this will consume a lot of resources and will take an extremely long time to complete.*

5. Once your search has completed you can apply additional filters from the left hand side of the screen under the “Refine Search Results” section to further narrow your results (a), you can view the information on the screen and click into the individual documents (b), or you can export the information to Excel (c).

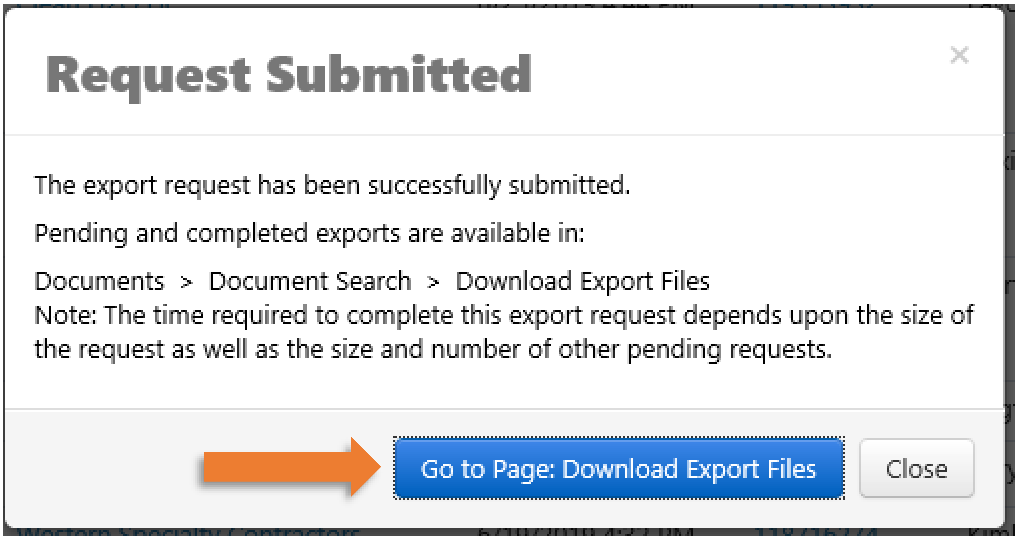


6. If you choose to “Export Search” you will need to name your file (a), choose your “Request Export Template” (b), and click the submit button (c). *Note: In most general cases, unless you need line item details, you will select the “Screen Export”. If you require line item details, you will select the “Full Export”.*



“Request Export Template” drop-down menu.

7. Once you click the submit button you will get the below box and you can click on the “Go to Page: Download Export Files” button to go to the export page.



8. This will take you to the “Download Exports” page. Once the File Name turns blue you can download your report by clicking on the hyperlink. This will download a Zip file with a CVS report in it. You will want to open it and save it as an Excel Workbook so you can use the common Excel functions on the report data.