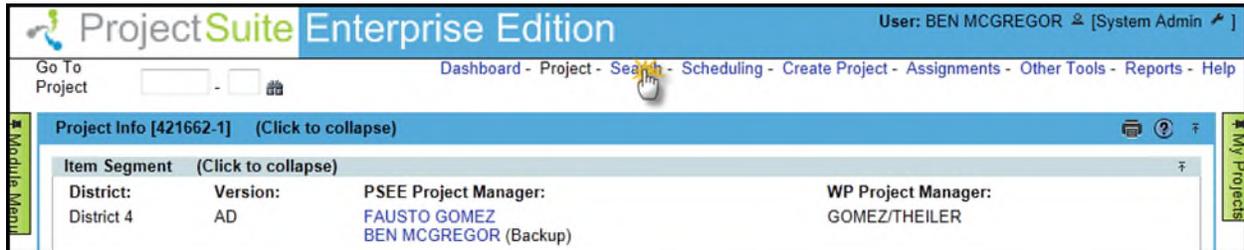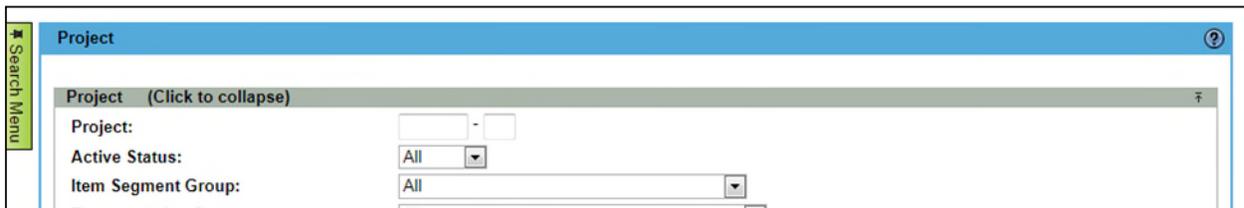# Document Search

The Search option allows you to search for Documents based on several criteria.
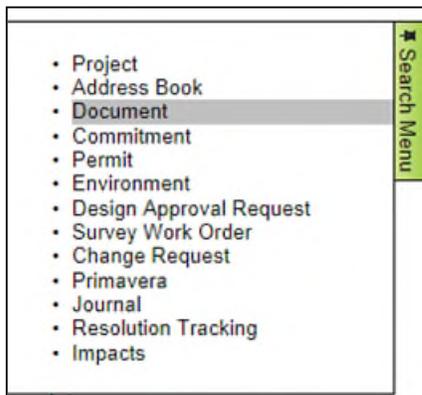
1. Select **Search** from the Main Menu in the upper right corner of the screen.
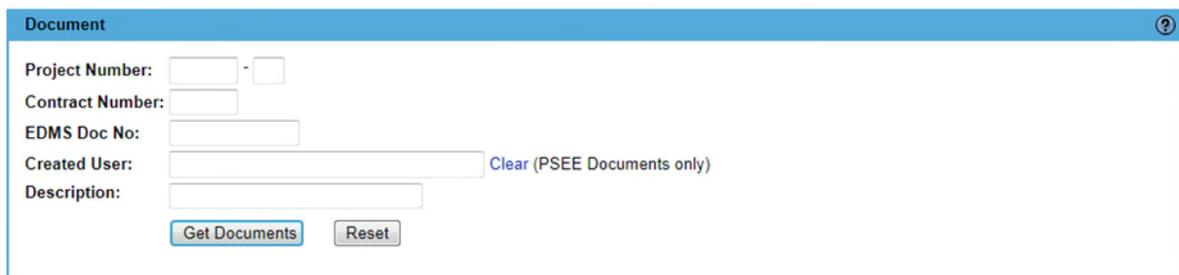

2. By default you are taken to the Project Search screen. Move your cursor over the Search Menu to display all searches available.

3. Select the **Document Search** tab.

4. You may search by one, or a combination, of the presented criteria.

Search By Project Number

1. Type in a complete or partial Project Number.
2. Select the **Get Documents** button. The list of results is returned. Results are divided into two sections. PSEE Documents are those added and managed using the PSEE Application. Enterprise Documents are those that have been uploaded to the Department's Enterprise Electronic Document Management System (EEDMS) by a system other than PSEE.

To Filter the List of Documents

Both document lists can be very large for some Projects. Use the filter selections at the top to refine the document list. You may filter PSEE Documents on Group and Type, and Enterprise Documents on Location, Business Area, Group and Type.

1. Select the drop-down beside the criteria you would like to filter.

2. Each drop-down selection will include a number. This is the number of documents that meet that particular selection. If there are no additional values in the drop-down list, then you cannot filter on that field.

3. The list of documents will be filtered automatically as values are selected.

To Sort the List of Documents
The listed documents may sorted by the column headings.

1. By default, the list is in ascending order by EDMS Document Number.
2. Click on any hyperlinked column heading to re-sort the column in ascending order. You will now see an upward pointing arrow beside the sorted column. Click the column header again to re-sort in descending order (indicated by a downward pointing arrow).

Search by Contract Number
1. Type in a Contract Number

2. Select the **Get Documents** button. The list of results is returned. All of the documents displayed are related to the Contract Number you entered.

3. As stated previously, the results are divided into two sections. PSEE Documents are those added and managed using the PSEE Application. Enterprise Documents are those that have been uploaded to the Department's Enterprise Electronic Document Management System (EEDMS) by a system other than PSEE.

4. Select View to the far right of the document name to view the document in its native application.

5. You may filter and sort the document list as described previously.

6. Click **Modify Search** at the top of the screen to enter a different Contract Number.

Search By EDMS Document Number

Each document stored in EDMS is given a unique EDMS Document Number. You may search using this Document Number.

1. Type in an EDMS [Document] Number

2. Select the **Get Documents** button. The list of results is returned. *There could be multiple documents with the same document number. This is due to documents being loaded in*

multiple locations. The example below shows both the document loaded in CO EDMS and TP EDMS.

3. Select **View** to the far right of the document name to view the document in its native application.
4. Select **Modify Search** at the top of the screen to enter a different EDMS Document Number.

Search By Created User

Documents that were added using PSEE have a Created User field. This is the person that attached the document. You can search for documents added to PSEE by a certain user.

1. Begin typing the first or last name of the person. A list of matching names will begin to appear. Select the correct name.
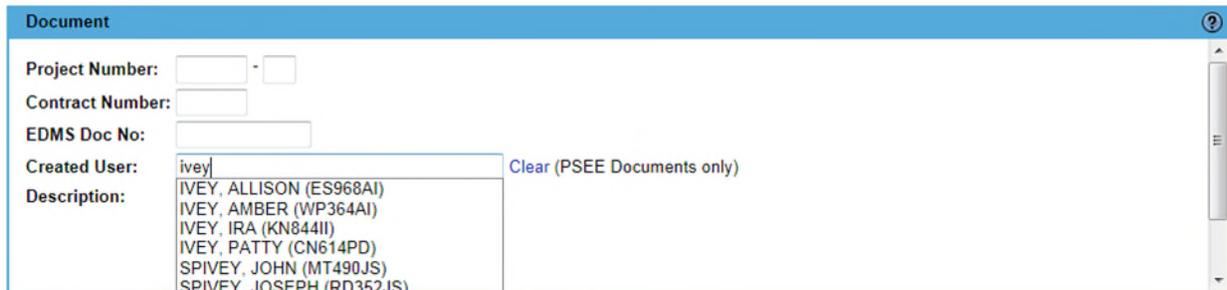
2. Select the **Get Documents** button. All documents submitted by the selected person in PSEE are displayed. The Project Number of the document is displayed. If the document is related to a Contract, that number is also displayed.
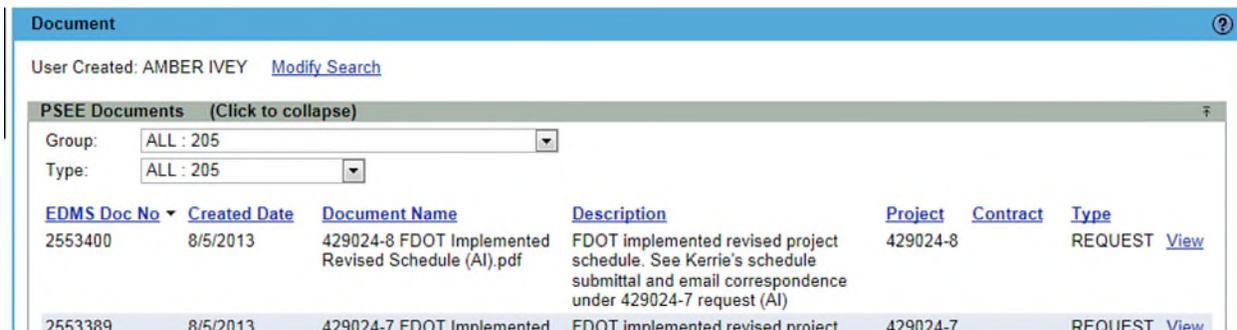

3. Select **View** to the far right of the document name to view the document in its native application.
4. You may filter and sort the document list as described previously.

Search By Description

Documents can also be searched by Description.

1. Enter the text to search for in the description field. Because entering only text could result in a very large list of documents, this field must be paired with another field.

2. A list of matching results is returned. The results are displayed in two sections: PSEE Documents and Enterprise Documents. The PSEE Documents are those documents that are housed under PSEE in the Enterprise Document Management System (EDMS). Enterprise Documents are housed in EMDS, but are from separate systems and are thus not governed by the PSEE System. For more information on Documents in PSEE, please read the Documents Module Help Document.

3. Select **View** to the far right of the document name to view the document in its native application.
4. You may filter and sort the document list as described previously.