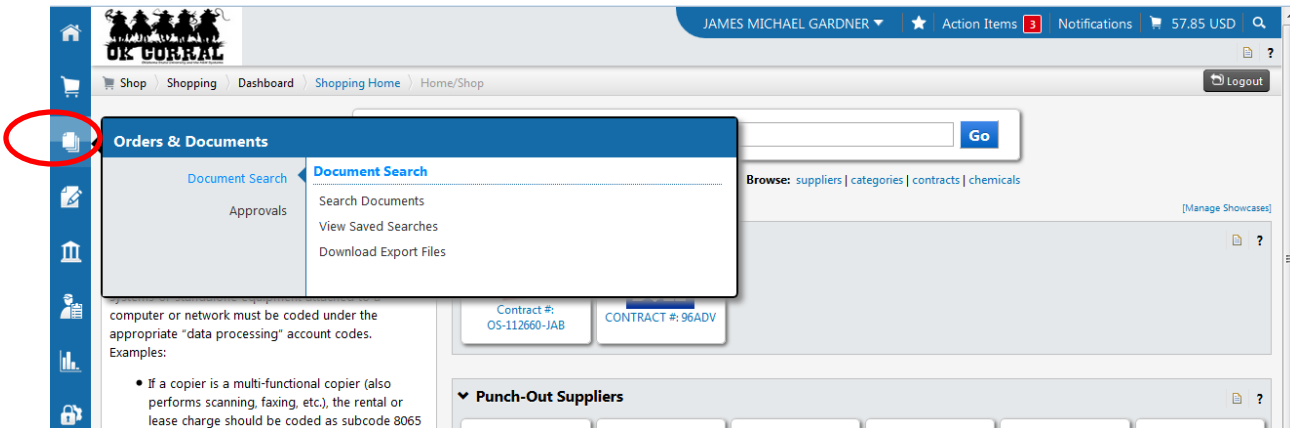# Step-by-Step Guide
Creating a Saved Search

In This Guide

- ✓ Creating an Advanced Search

- ✓ Creating a folder to store Saved Searches

- ✓ Creating a new Saved Search

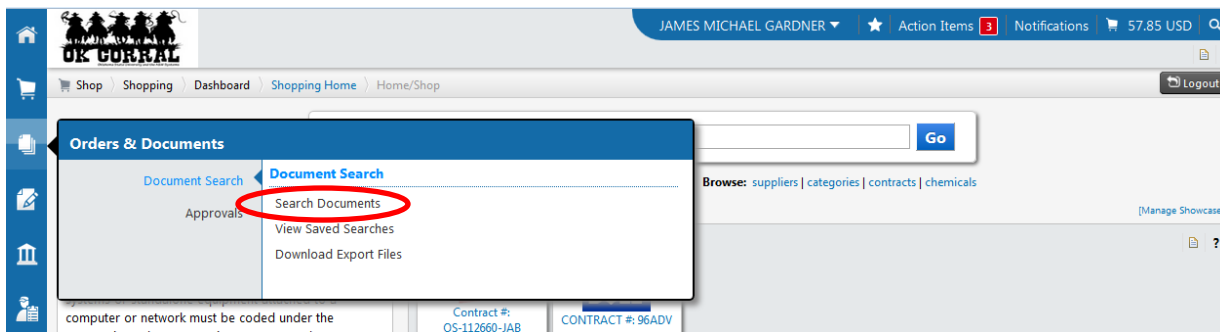- ✓ Adding a shortcut for your Saved Search to the main Document Search page

You may find yourself performing the same searches time and again, for instance you might need to check on all activity on a certain account. This procedure will demonstrate how to save your searches so that you can perform them at will without having to enter the criteria each time. It will also demonstrate how to create a folder to store your Saved Searches in and how to add a shortcut to the main Document Search page so that your Saved Searches are easily accessible.

Procedure

1. Navigate to the main Document Search page by hovering over the "Orders & Documents" icon on the left hand navigation bar. This will open the fly-out menu for "Orders & Documents".

2. Hover over "Document Search" and then select and click "Search Documents" on the right-hand side of the "Orders & Documents" menu.
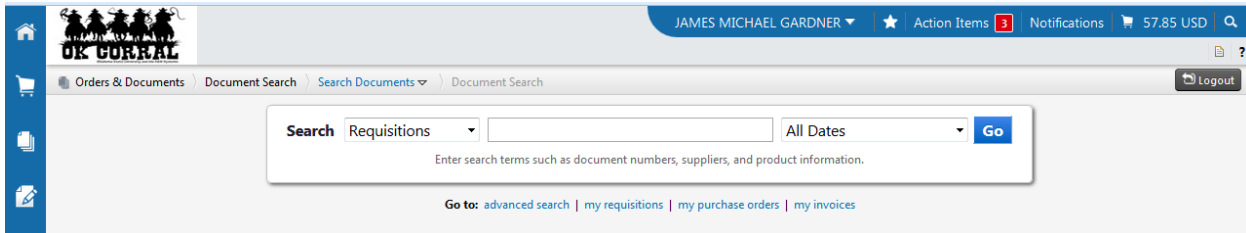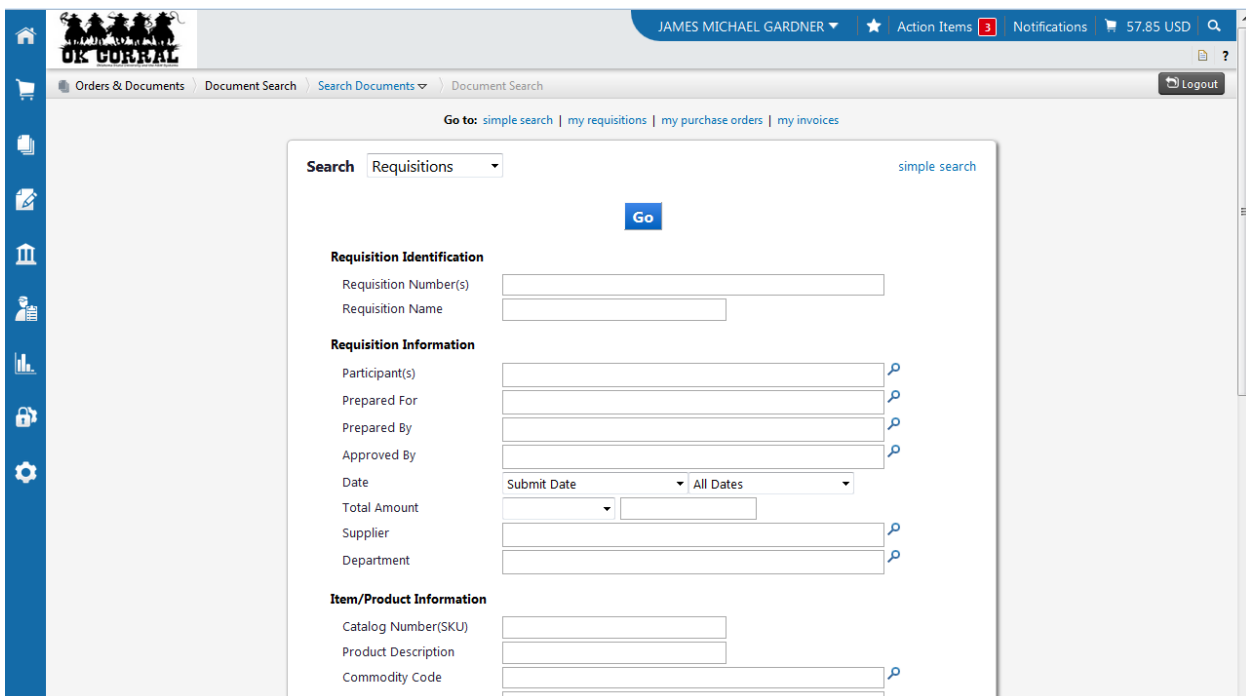
3. This will open the "Document Search" main page and it defaults to the "Simple Search" bar that allows you to search documents by entering search terms such as document numbers, suppliers, and product information.

4. To do more intricate searches such as searching for all documents that use a particular Account Code, you will need to use the "Advanced Search" by clicking the link beneath the Simple Search bar.
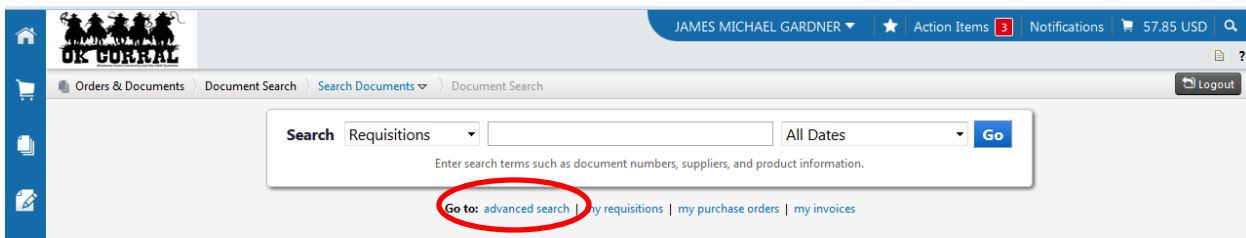
5. Clicking on "advanced search" will open the "Advanced Search" page that allows you to configure your search around specific key criteria.

6. For our example we're going to look at all requisitions created within the last 7 days. Under the heading "Requisition Information" the 5th item is "Date" and there are some options to choose from. We're choosing "Submit Date" and "Last 7 Days".

7. Making these selections we click on the blue "Go" button centrally located at the top and bottom of the page.

8. Our search yielded several pages of results and searches you perform may yield more or less depending upon your search criteria. To save your search you should click on the blue "Save Search" on the left-hand side of the screen.

9. This will open a pop-up window titled "Add to Saved Searches"

10. This page allows you to give your search a nickname so that you will recognize it when you see it again. We're naming this search "Req-Last 7 Days". You can also add a description by clicking on the "Add Description" link if you like.
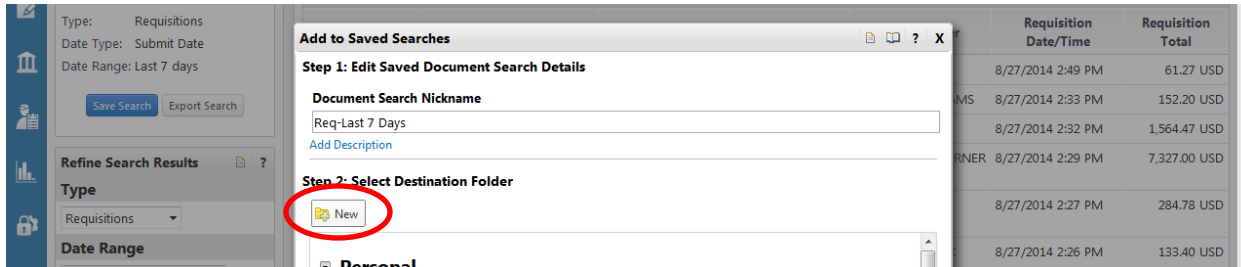
11. If you have already created a folder to keep your saved searches in you can select that at this time. If you need to create a folder you should select the "New" button under the "Step 2: Select Destination Folder" heading.

12. This will allow you to create your new folder in the "personal folder" area, the "shared folder" area, or in a subfolder area if that is appropriate. We're going to put our saved search in the "personal folder" area so we will select "Top level personal folder".
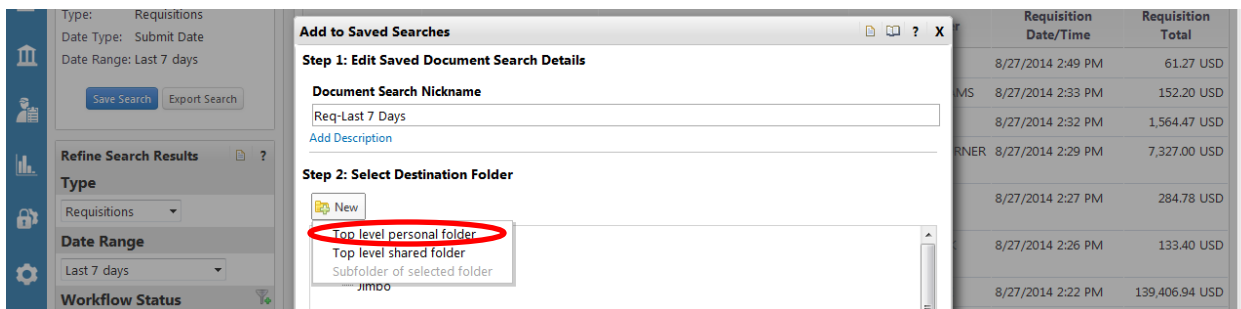
13. Another pop-up window will appear that will allow you to name your folder and add a description. We will use "My searches" as both the name and the description but you should name your folder something meaningful to you.
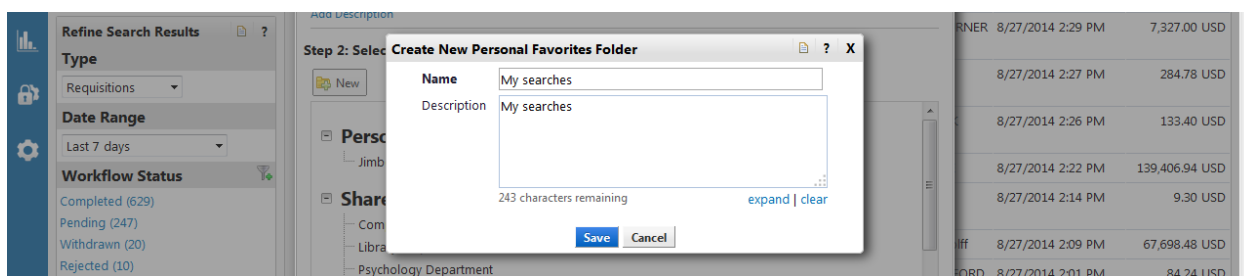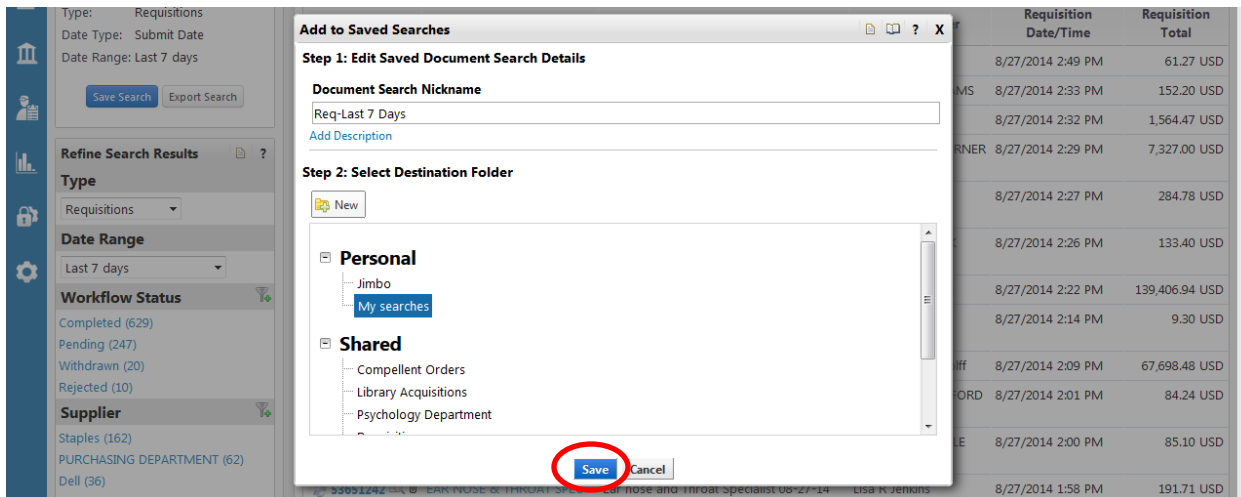
14. Click on the blue "Save" button to save your new folder. Your folder should appear in the "Select Destination Folder" area under the "Personal" heading. It should be selected by default at this point but you can click on it to make sure it is selected. To finish saving your saved search "Req-Last 7 Days" click on the blue "Save" button at the bottom of the page.

15. A congratulatory message should appear to let you know of your success!
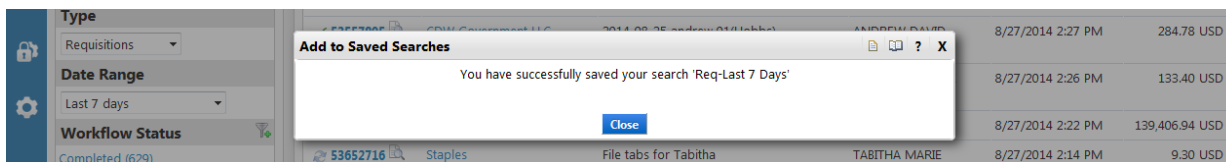
16. Close the message above. To access your new saved search navigate to the main Document Search page by hovering over the "Orders & Documents" icon on the left hand navigation bar. This will open the fly-out menu for "Orders & Documents".
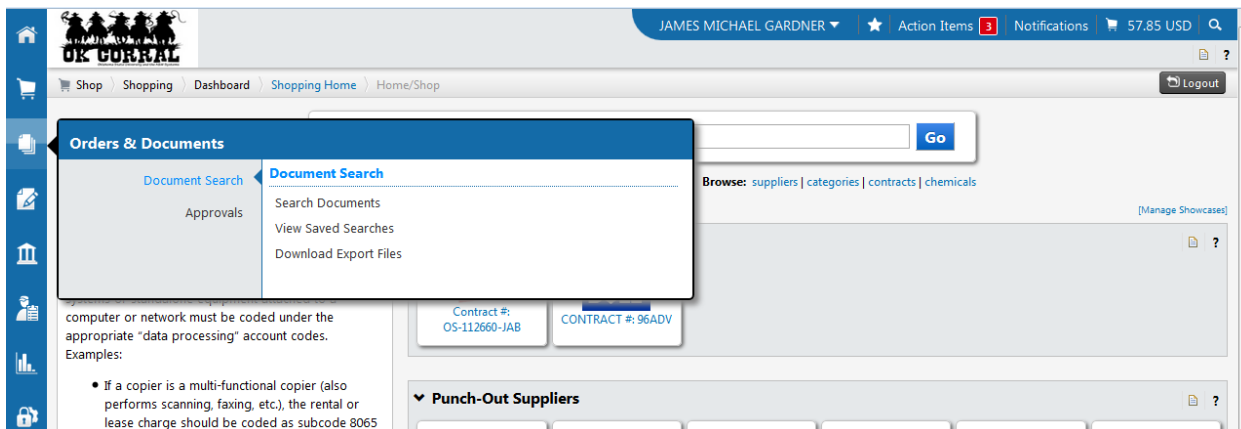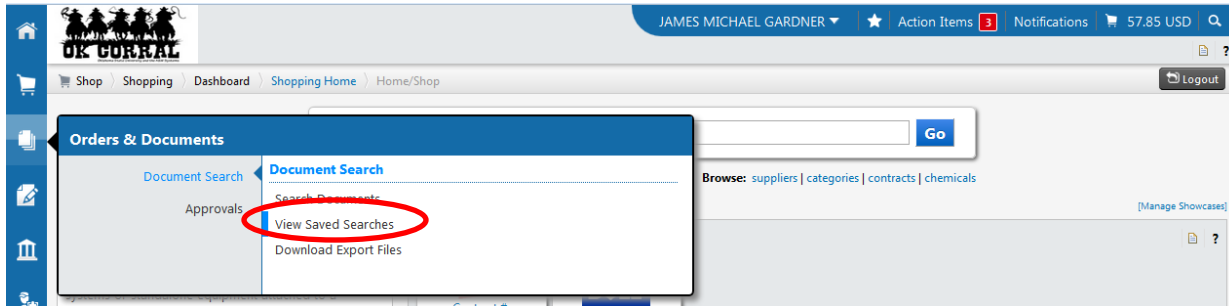
17. Hover over "Document Search" and then select and click "View Saved Searches" on the right-hand side of the "Orders & Documents" menu.

18. This will open the "Saved Searches" page and if you select the newly created folder "My searches" you will see the search "Req-Last 7 Days" in the list of searches. Clicking on the search name will run the search and produce the appropriate results.
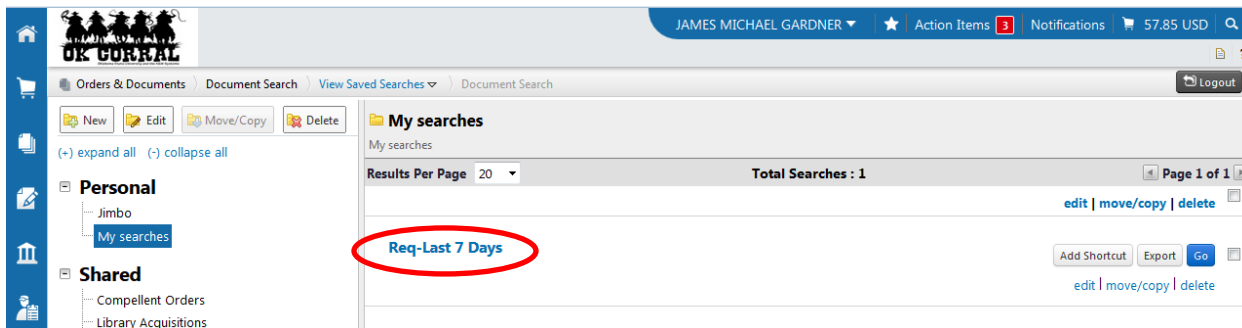
19. If you would like for this search to be available from the main "Document Search" page, simply click on the "Add Shortcut" button on the right-hand side of the page.
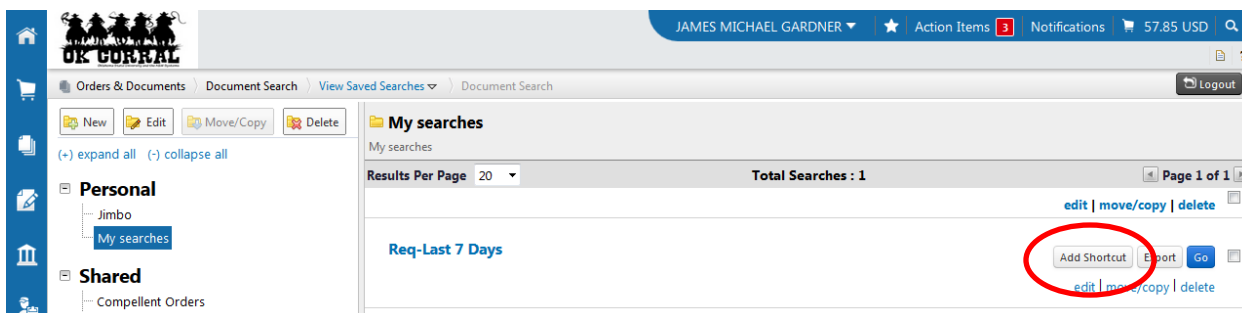
20. If you navigate back to the main "Document Search" page (follow Step number 1 of this procedure). You will see your "Saved Searches Shortcuts" at the bottom of the page and you can run your search from there.