

Saved Searches

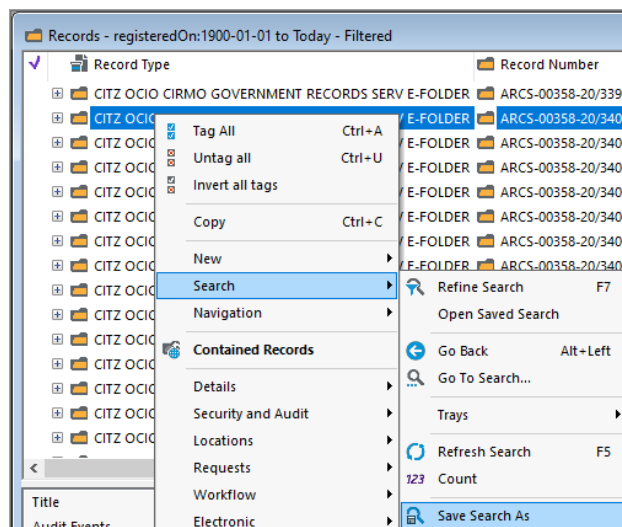
Notes:

You can save a Record or Location search, which includes the search parameters, filters and other options, and the column configuration for the search results. These searches can be saved for later use.

Personal record searches are accessed by selecting **Saved Searches** on the Shortcuts Pane under the **Favourites** tab; all public saved searches can be located from the **Search Tab**, under the **Records** and **Locations** dropdowns select **Saved Record Searches** or **Saved Location Searches**.

To Save a Search:

1. Run a record or location search that you want to save to perform regularly.
2. Once the results are listed, right click anywhere in the **Search Results** window, select **Search** and then **Save Search As**.



3. The **New Saved Search** popup is displayed. Enter details for the saved search:
 - **Name:** enter a name for the saved search (max 50 characters). Use a name that will be easy to find next time you use the search. No symbols or special characters allowed.

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- **Description:** the description used is provided by EDRMS Content Manager.
- **Icon:** select an icon for the search if you want, it is not mandatory.
- **Owner:** select location options for the search:
 - **Person:** only the owner has access to the saved search, it is private.
 - **Leave Blank:** everyone has access to the saved search, it is public.
 - **Group:** only members of the group have access to the saved search.
- Within Search Group: Leave blank.
- **Add to favorites:** Tick this box to move saved search to your favourites.

The screenshot shows a 'New Saved Search' dialog box with the following fields and options:

- Name:** Test Saved Search
- Description:** Records - registeredOn:1900-01-01 to Today - Filtered
- Icon:** A gift icon with a red ribbon.
- Owner:** Drakos, Zoe
- Within Search Group:** (Blank)
- Add to favorites:** ☒
- Edit query:** (Button)
- Buttons:** OK, Cancel, Help

4. All users have access to saved searches if the **Owner** field on the **General Tab** is left blank. Your name will prefill by default so remove if you want others to access.
5. Click **OK** to save the search.
6. To find your saved search click on **Saved Searches** on the **Shortcuts Pane** under the **Favourites** tab.

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7. To run the saved search, double click **OR** right click, select **Open**, to see search results.

