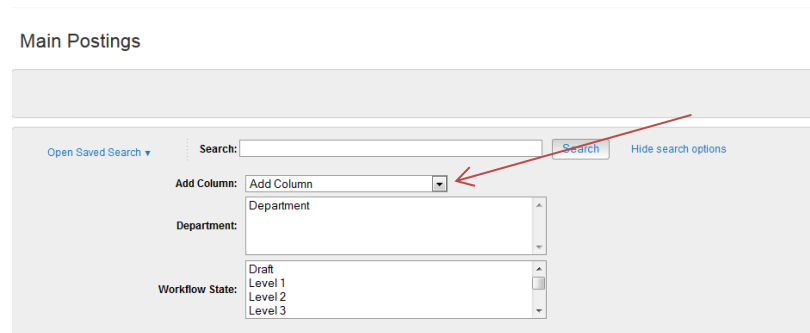**Creating an Saved Search**

To create a search for items on a page

1. The **text search box** allows you to search for specific words or names.

2. Select **More search options** to expand the search tools area. Then select the item you want to add to the search from the ***add column field,***   it will appear below in your search results .

3. Use the column controls to organize and sort the search results:

   ▪ **Move a column to the left or to the right** using its left and right controls.

   ▪ **Delete a column** using its **delete** control if you do not want to display it. If you need to add it back later, use the **add columns** control to do so.

   ▪ **Order the search results by sorting a column** in ascending or descending order using its up and down controls.

   ▪

To export search results

1. Set up the search or open a saved search.

2. From the Actions menu, select **Export Results**. The search results are saved in .xls format. Depending on your browser, the file may automatically download to your computer's download folder, or you may be prompted to choose whether you want to open or save the file.

To save a search

When you save a search, you have the option to set it as your default search. This is your only opportunity to set it as the default search.

If you have administrative privileges on the system, you can share your saved search by tagging it as a global or group saved search. Non-administrative users can only save personal searches.

1. After you have added the search and filtering fields to present the search results the way you want to see them, select **Save this search**. The Saved Search area expands.

2. Give the search a name that will help you remember its purpose.

3. Select one of these:

   ▪ **Personal Saved Search** – Only you will have access to this search.

   ▪ **Group Saved Search** – The search will be available to all users within the groups that you specify. Select at least one group from the list that appears when you select the Group Saved Search option. To select more than one group, hold down the Ctrl key while you select the groups.

   ▪ **Global Saved Search** – The search will be available to all users within your organization.

4. If this search presents the information you will normally want to see when you navigate to this page, you may want to select **Make this the default search**.

5. Select **Save this search**. The search tab refreshes to present the name you have given the search. This tab remains available for the rest of your session. The next time you log in, the search is available from the list of saved searches in that area.

You can delete your personal saved searches when they are no longer useful to you.

To run a saved search

1. Access the list of items you need to search.

2. From the **Open Saved Search** menu, select the search you want to run. A new tab presents the search results.

To delete a saved search

1. Access the list of items you need to search.

2. From the **Open Saved Search** menu, select the search you want to run. A new tab presents the search results.

3. Select the **Delete (X)** control placed just after the name of the search and the number of search results returned. A message asks you to confirm that you wish to delete the saved search.