

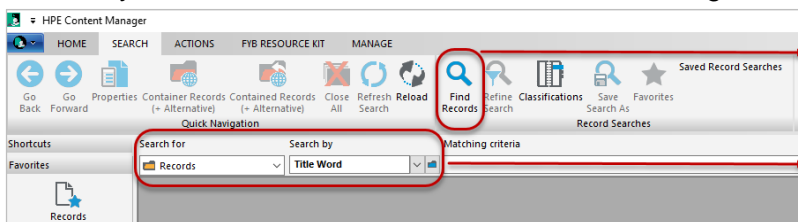
# Create Saved Searches

## Introduction

Searches performed in HPE Content Manager can be saved as Saved Searches and added to your Favorites. This allows you to quickly and easily run this same search whenever you need to, without having to re-enter the search parameters.

## Procedure

1. Perform your search; either as a Quick Search or using the advanced search options; i.e.

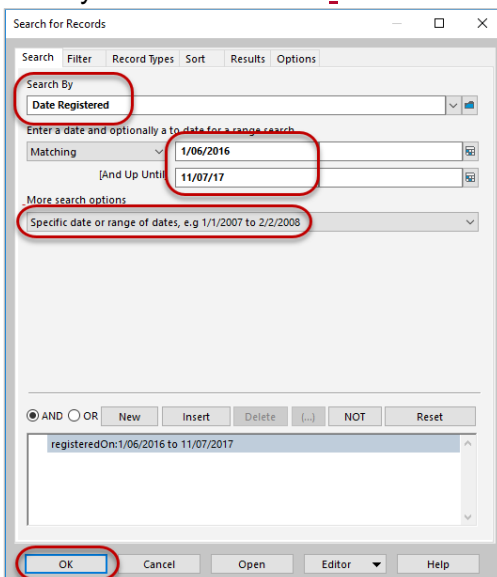


Select **Search** tab and then **Find Records**

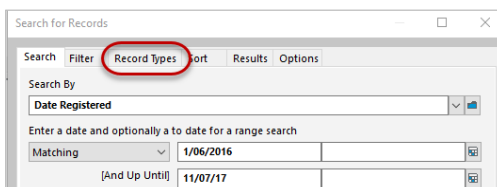
or

Search For – Search By – Matching criteria

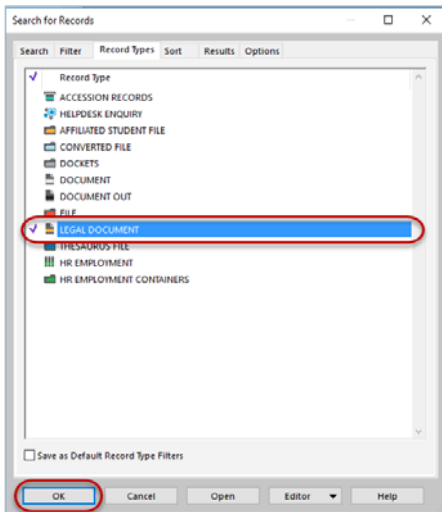
2. Enter your search criteria.



e.g. The example search shown here uses the **Find Records** method, and aims to find legal documents created in the previous month.



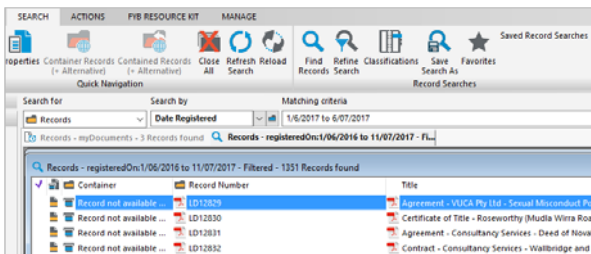
To ensure that the results returned are only legal documents, select **Record Types**.



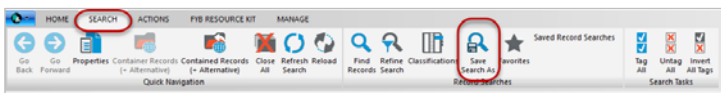
Right-click on any item in this list, and from the dropdown menu, select **Untag All**. Then **click** next to the Legal Document option only to select with the tick.

3. Click **OK** to run search.

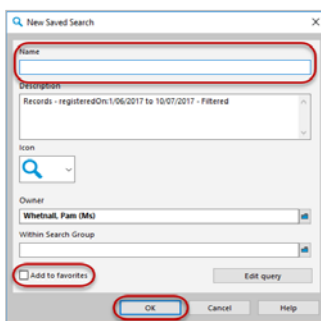
4. Check that the search results returned are what you want to save as a Saved Search.



5. Open the **Search** tab and select **Save Search As**.



6. NAME the search to reflect what the search results contain, e.g. *Legal Documents Registered in the 2017 Financial Year*.



7. Tick **Add to Favorites** to have the search saved into your favourite searches to run in the future.

8. Click **OK**.

The search is saved in the Favorites tray under **Saved Searches**.

Saved Searches are useful when searching for multiple parameters for example – Creator is “you” **and** documents registered between certain dates.

## Contact Us

For further support or questions, please contact Records Services on **8313 5334** or [records.services@adelaide.edu.au](mailto:records.services@adelaide.edu.au)