

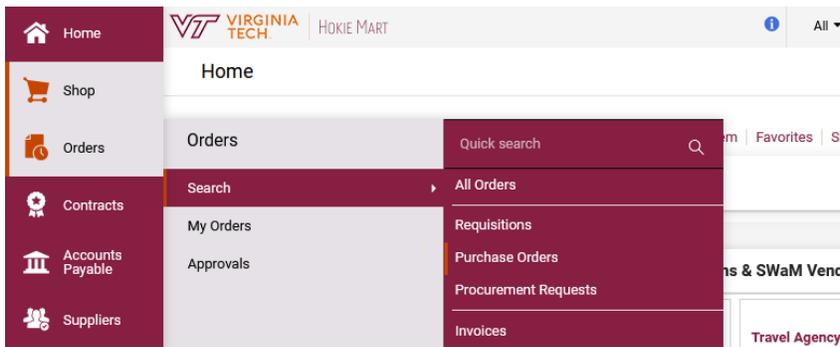
## Creating a Saved Search

What is a Saved Search?

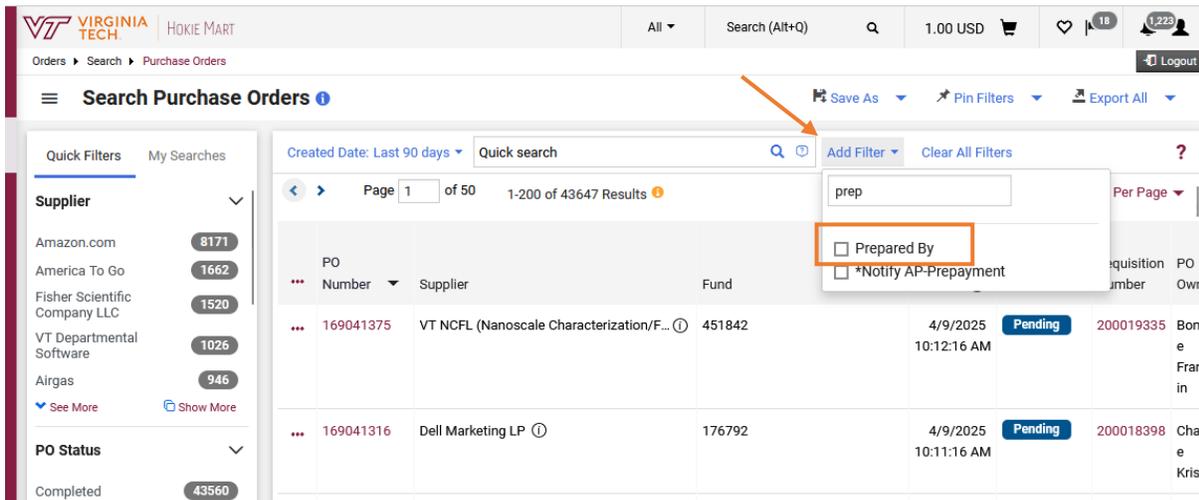
If you find yourself recreating a specific search using special filters on a regular basis, you can create a saved search in order to quickly apply your filters and receive your desired results. Saved searches can be created for any document type in HokieMart, such as requisitions, purchase orders, receipts, or invoices. This can be helpful in tracking things like your Shared Department purchase orders or purchase orders with invoices awaiting receipt.

Creating a saved search will save your search criteria to a list of your searches. You can then go in to your list of searches at any time and click your saved search to apply your search criteria without selecting each filter individually. Follow the steps below to save a search.

Navigate to the document type you want to search.



Click **Add Filter**. Scroll through the list of available filters, or start typing a filter name to quickly bring that up as an option. Select the check box next to the filter you want to add. In this example, we will add the filter for *Prepared By*.



Once that filter is added, you will then need to provide your criteria for the filter. Type in your user name or the name of the user you want to find Shared Department orders for.

The screenshot shows the 'Search Purchase Orders' page with the 'Prepared By' filter set to 'All'. A dropdown menu is open, listing several users: Dalton, Chad; Dalton, Jeffrey; Bodtke, Dalton; Lockhart, Geneva; Dalton, Elan; Dalton, Ame; Dalton, Keith; Dalton, David; Dalton, Yvonne; and Dalton, Rachel. 'Dalton, Chad' is selected and highlighted with an orange box. An orange arrow points to the 'My Searches' tab in the left sidebar.

Then you'll see all PO's that you entered including purchase orders you entered on behalf of Shared Department.

The screenshot shows the search results for 'Dalton, Chad'. The results table is highlighted with an orange border. An orange arrow points to the gear icon in the top right corner of the table area, used for column customization. The table contains the following data:

PO Number	Supplier	Fund	Created Date/ Time	PO Status	Requisition Number	PO Owner	Shipment Status	Total Amount	Receipt Status
P4580985	VT Departmental Software	121715	3/5/2025 3:22:57 PM	Completed	198192630	Chad Dalton	Sent To Supplier	75.00 USD	No Receipts
P4573872	B&H Photo	121715	2/19/2025 3:39:06 PM	Completed	197863241	Chad Dalton	Sent To Supplier	179.42 USD	Fully Received
P4564149	Guy Brown Products	121715	1/29/2025 2:44:13 PM	Completed	196814507	Chad Dalton	Sent To Supplier	30.79 USD	Fully Received
P4547211	D Warner Group	121715	12/10/2024 1:36:50 PM	Completed	195112640	Chad Dalton	Sent To Supplier	1,530.00 USD	Fully Received
P4534874	D Warner Group	121715	11/8/2024 3:47:07 PM	Completed	193708740	Chad Dalton	Sent To Supplier	1,530.00 USD	Fully Received
P4519938	D Warner Group	121715	10/8/2024 2:29:20 PM	Completed	192726241	Chad Dalton	Sent To Supplier	1,305.00 USD	Fully Received
P4518807	Lowe's Home Centers Inc	121715	10/7/2024 8:54:15 AM	Completed	192631858	Chad Dalton	Sent To Supplier	22.60 USD	Fully Received

*Extra tip: You can also add and remove columns by clicking on the gear icon on the top right of the search results!*

To save this search, click on **Save As** at the top right

PO Number	Supplier	Fund	Created Date/Time	PO Status	Requisition Number	PO Owner	Shipment Status	Total Amount	Receipt Status
P4580985	VT Departmental Software	121715	3/5/2025 3:22:57 PM	Completed	198192630	Chad Dalton	Sent To Supplier	75.00 USD	No Receipts
P4573872	B&H Photo	121715	2/19/2025 3:39:06 PM	Completed	197863241	Chad Dalton	Sent To Supplier	179.42 USD	Fully Received
P4564149	Guy Brown Products	121715	1/29/2025 2:44:13 PM	Completed	196814507	Chad Dalton	Sent To Supplier	30.79 USD	Fully Received
P4547211	D Warner Group	121715	12/10/2024 1:36:50 PM	Completed	195112640	Chad Dalton	Sent To Supplier	1,530.00 USD	Fully Received

Give the saved search a nickname and then either add it to a Personal folder if you have any or create a new folder by clicking **Add New**.

**Save Search**

**Step 1: Details**

Nickname ★

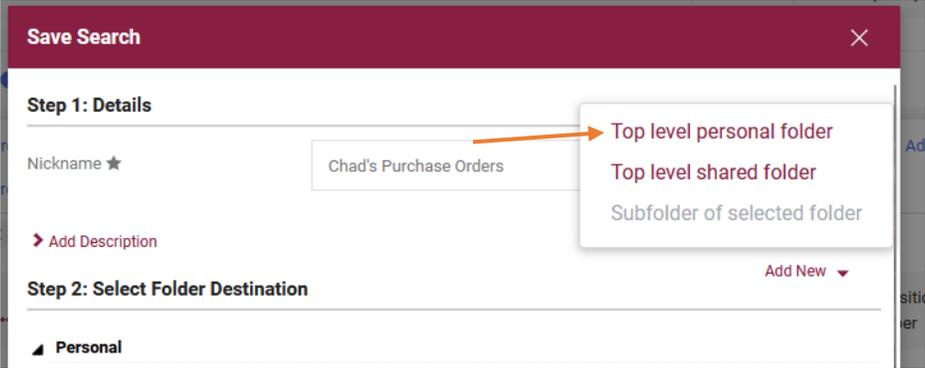
➤ Add Description

**Step 2: Select Folder Destination** Add New ▼

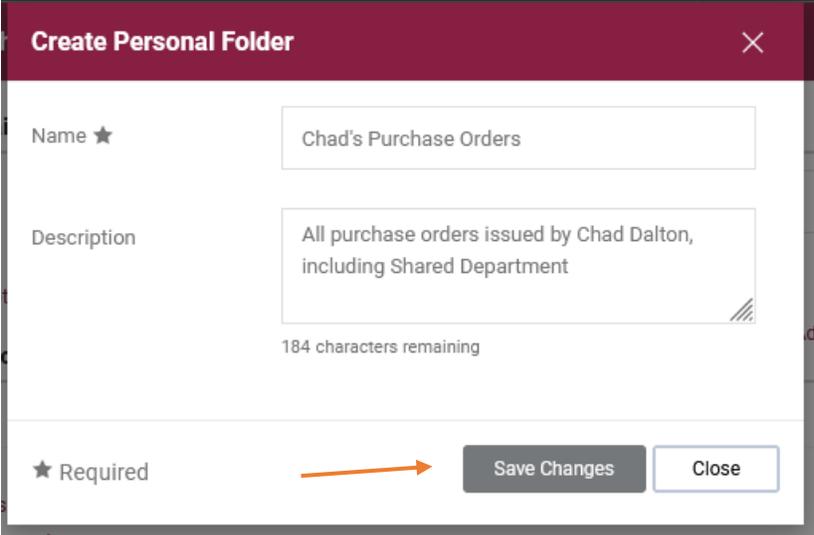
- Personal
  - Biology Department
  - Chad's Purchase Orders
  - My PO's
  - Procurement
    - Shared department orders
- Shared
  - Accounts Payable Payment Forms
  - AP Team
  - Contract Search
  - Daily Search of Payment Form Invoices
  - ITPALS Requisitions
  - PO Distribution Issue
  - PO Extract
  - Procurement Approval Requisitions
  - Solicitation (Sourcing) Request Form
  - Sourcing Events

Save Close

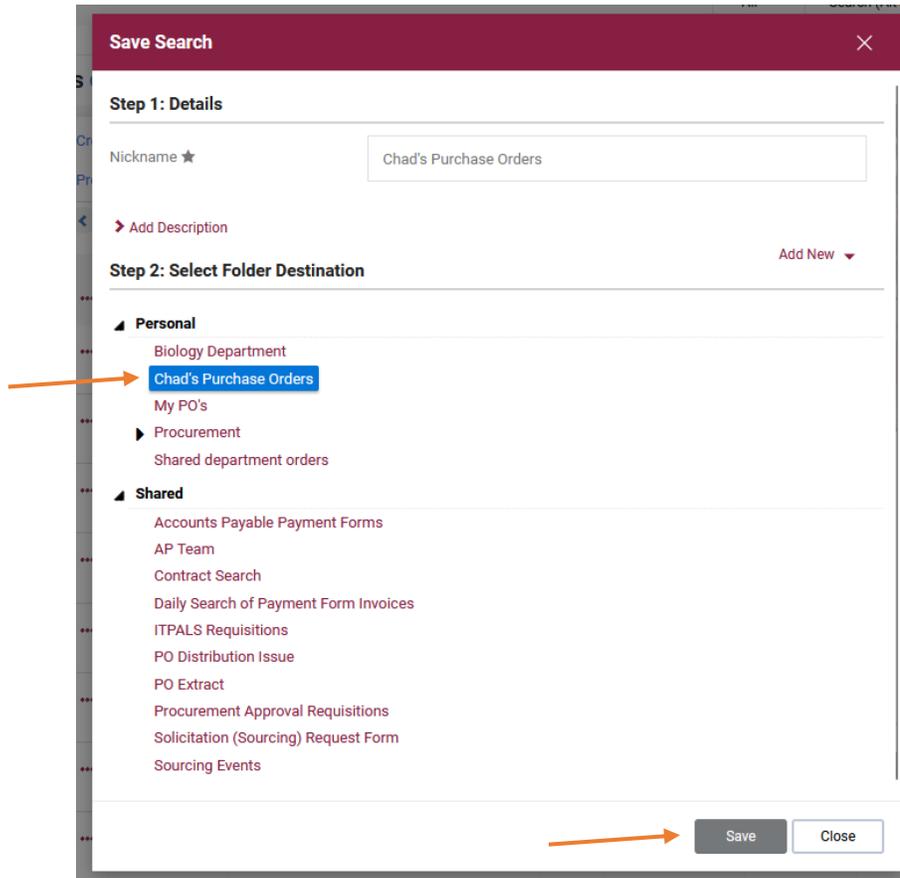
If you creating a new folder, you will have the choice between a personal folder or shared folder. A personal folder will only be viewable to you.



Then give the folder a name and description and click Save Changes.



Once you've created the folder, it will show as selected for this saved search under **Personal**. Click **Save**.



To access your saved search at a later point in time, you will come to the Purchase orders search page just like you did at the beginning of these steps and switch over to **My Searches**. Click on the one you just created to show those live search results.

The screenshot shows the 'Chad's Purchase Orders' search results page. The 'My Searches' tab is selected in the left sidebar. The main content area shows a table of purchase orders with columns for PO Number, Supplier, Fund, Created Date/Time, PO Status, Requisition Number, and PO Own.

PO Number	Supplier	Fund	Created Date/Time	PO Status	Requisition Number	PO Own
P4580985	VT Departmental Software	121715	3/5/2025 3:22:57 PM	Completed	198192630	Chac Dalt
P4573872	B&H Photo	121715	2/19/2025 3:39:06 PM	Completed	197863241	Chac Dalt
P4564149	Guy Brown Products	121715	1/29/2025 2:44:13 PM	Completed	196814507	Chac Dalt