


Saving a Custom Search to a Tab



How do I create a tab with desired search criteria so that I can quickly pull the search repeatedly?

In the Agreement Module, the user can customize a search with desired criteria and save the search to a tab for repetitive use.

- Click on “**Agreement**” tab, then “**All Agreements.**”
- Click on the “**Advanced Search**” button.

- Click on the plus  icon for more criteria choices if needed. Scroll through the list and toggle desired criteria to show in the Advanced Search.

- Enter criteria for search.
Note: Multiple Units can be added to the PI Unit and Lead Unit fields. If more than one unit is required, then check the boxes next to each in the dropdown menu and re-enter the desired unit if it does not show in the dropdown menu.

- Click on **“Search.”**
- Click on **“Save filter”** button.



The following box will open:

 A screenshot of a "Save Filter" dialog box. At the top, there is a close button (X) and an information icon (i). Below this is a light blue banner with an information icon and the text: "Saving this filter will store your current column layout and filter values for future use." The main section is titled "Filter name" and contains a text input field with "Filter Name Here" and "34 characters remaining" below it. To the right of the input field is a toggle switch labeled "Set as default" with an information icon. Below the input field is another toggle switch, currently off, with the text "Transform your current filter into dedicated dashboard tabs for quick access and personalized view!". At the bottom right are "Close" and "Save" buttons.

- Enter a **Filter Name**.
- Click on the toggle switch to **“Set as default”** if desired.
- Click on the toggle switch **“Transform your current filter into dedicated dashboard tabs for quick access and personalized view!”** to create a tab.

 A screenshot of the "Save Filter" dialog box, similar to the previous one but with the "Transform your current filter into dedicated dashboard tabs for quick access and personalized view!" toggle switch turned on. Below the main filter name section is a new section titled "Save Preference" containing a "Tab name" input field with "Tab name" and "50 characters remaining" below it. The "Close" and "Save" buttons remain at the bottom right.

- Enter a **Tab name**.
- Click **“Save.”**