

Searching for a Contract Workspace

Introduction

Users can search for Contract Workspaces (CW), reports, documents, and other items using the search functionality. This is particularly helpful for users who do not own the Contract Workspace and are just asked to review it while not being on the Team tab.



Learning Objectives

At the end of this job aid, **you will be able to:**



Use the Search Bar.



Add new filters to a Search.



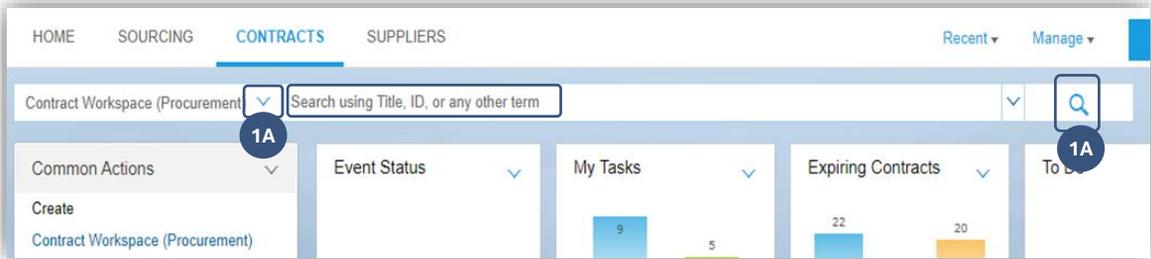
Save a Search.

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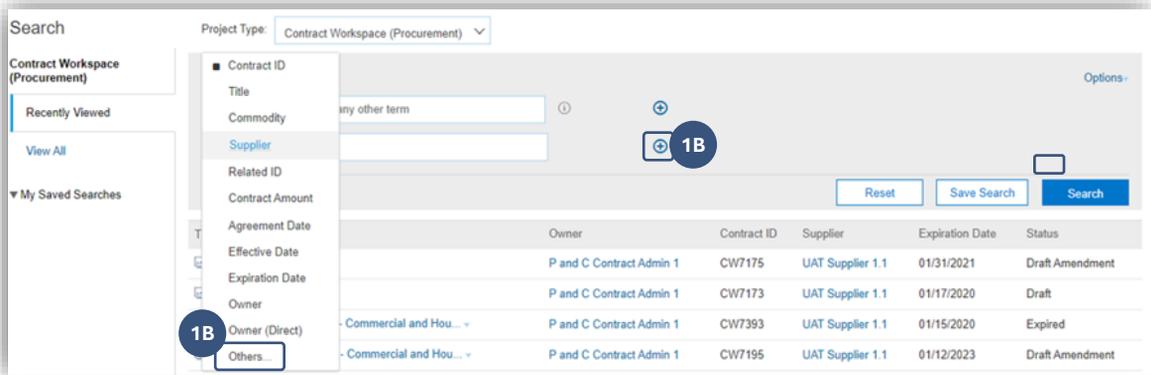
Using the Search Bar

1 Access the **Contracts** tab and locate the **Search Bar** in the upper section of the dashboard.

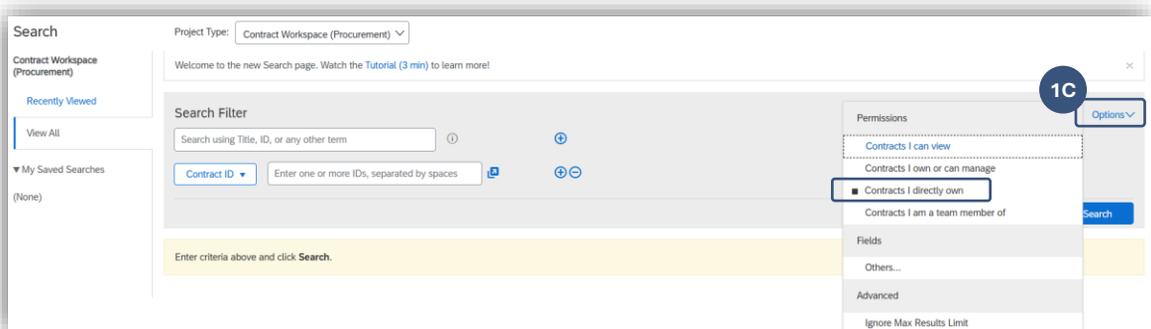
A. The **Contract Workspace (Procurement)** selection is defaulted in the **Search Bar**, but the type of item to be searched for can be changed by clicking the down arrow to the right of the **Search Type** selection box. A large drop-down menu will appear, and the user can select what other type of search to conduct. Enter a search term in the search box and click the magnifying glass icon to initiate the search.



B. The search results will be returned on a new page, the **Search Screen**. Additional search filters are available by clicking the + button. Click the menu to the left of the search field to choose which filter to use to narrow the results. Preference is given to commonly used filters, but all filters can be accessed by selecting **Others** at the bottom of the menu.



C. Clicking the **Options** link in the upper-right portion of the **Search Screen** will display a drop-down from which other user-related parameters can be set, including the defaulted **Contracts I can view** or the more specific **Contracts I directly own**.



D. When the item being searched for appears in the **Search Result** section, click on its **Title** and select **Open** from the drop-down menu to navigate to that CW or other item.

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Saving a Search

2 If a search is done frequently, it can be set up as a **Saved Search** rather than resetting filters each time.

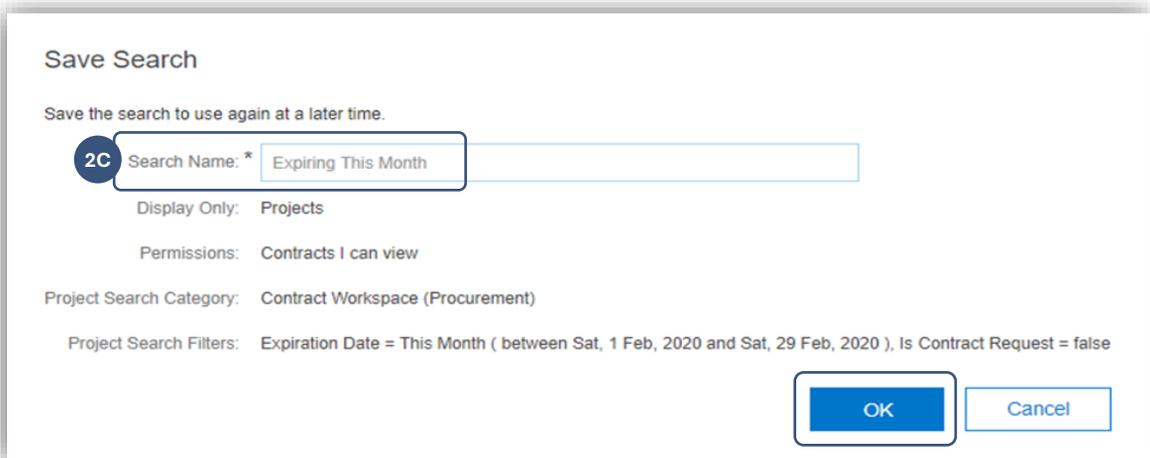
A. On the **Contracts** tab, select the correct document type and click the magnifying glass icon in the **Search Bar** to initiate the search.



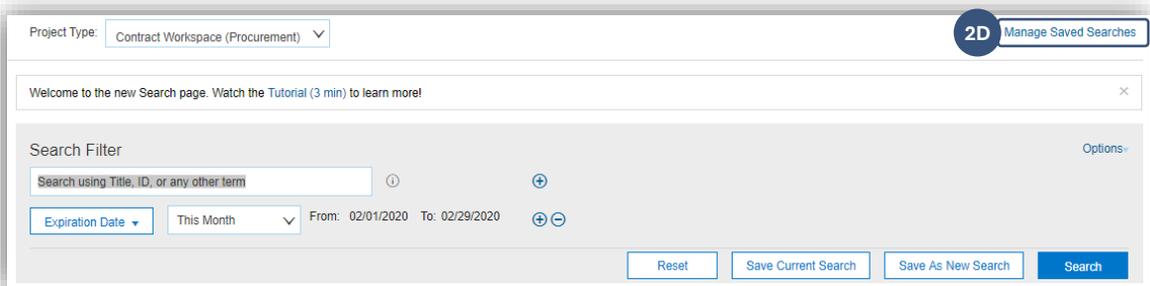
B. Enter the additional criteria that is commonly used and click the **Save Search** button.



C. On the subsequent **Save Search** window, enter a name for the **Saved Search** and review the search criteria before clicking **OK** to save the search.

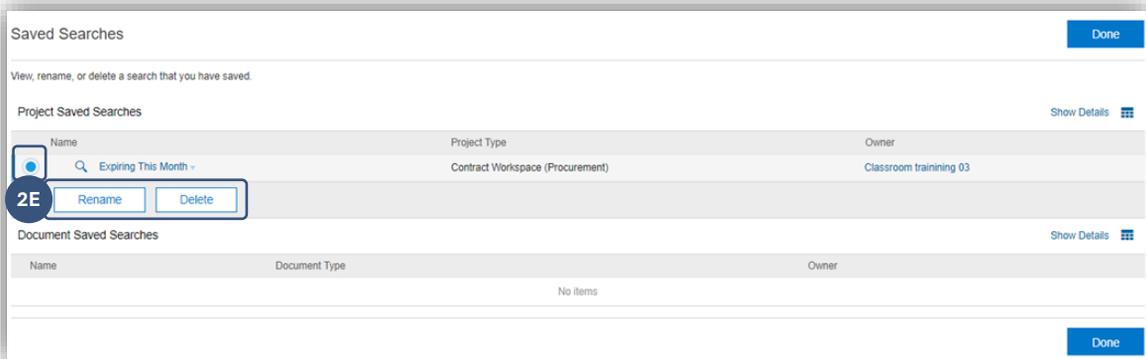


D. Search results will display, and all **Saved Searches** can be managed by clicking on the **Manage Saved Searches** link in the top right of the **Search Screen**.



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E. Click the radio button next to the specific **Saved Search** and click **Delete** or **Rename** if the search needs to be edited or deleted, then click **Done** to initiate the change.



F. **Saved Searches** can be accessed by clicking the down arrow on the **Search Bar** to the left of the magnifying glass icon. By default, all users will see **Saved Searches** for **My Active Projects** and **Active Projects where on team**.

