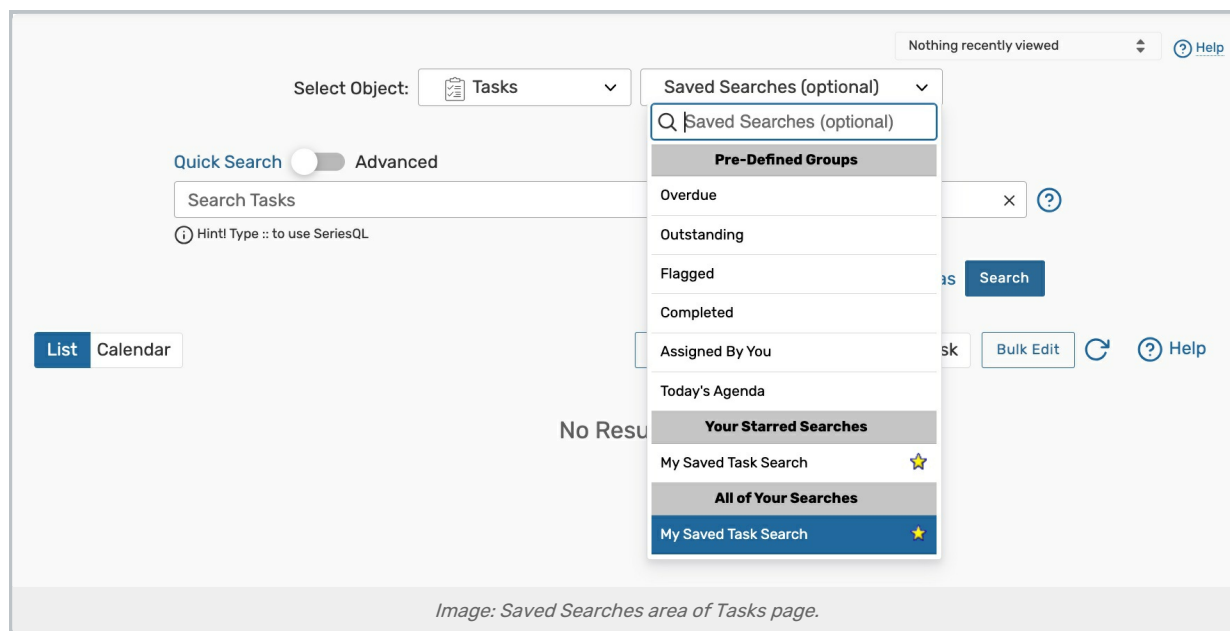


Acting on Saved Task Searches

The Tasks page provides easy access to your own saved task searches (All of Your Searches) and those provided by the system (Pre-Defined Groups). You can act on – edit, copy, rename, or delete – saved task searches you created or that have been shared with you by other users.



To Edit a Saved Task Search

1. Bring The Search Up

- On the Tasks page, select the search from the **All of Your Searches** list.

2. Toggle to Advanced Mode

The screenshot shows the 'Advanced' search mode for 'Tasks'. At the top, there are two dropdown menus: 'Select Object:' with a 'Tasks' icon and 'Saved Searches (optional)'. Below these is a toggle for 'Quick Search' (disabled) and 'Advanced' (selected). A note states: 'At least one task state and one task type are required, but you may choose any combination of task types or states, or all of them. By default, task searches return only tasks due today.' There are two expandable sections: 'Task States' and 'Task Types'. 'Task States' includes checkboxes for 'Outstanding' (checked), 'Completed', 'Denied', 'Cancelled', and 'Flagged Tasks Only'. 'Task Types' includes checkboxes for 'To Do Tasks', 'vCalendar To Do Tasks', 'Authorization Tasks', 'Notification FYIs', and 'Assignment Tasks' (all checked). A footer note reads: 'Image: In Advanced mode you can adjust the search criteria.'

- Use the search type toggle to switch to **Advanced** mode. Add, remove, and modify search criteria as needed.

3. Test the Edited Search

- Run the search to see if you're getting the desired results. Make changes if necessary and search again.

4. Save the Edited Search

- Use the **Save** button to save your search.

To Copy a Saved Task Search

- On the Tasks page, select the search from the **All of Your Searches** list.
- Use the **Save As** button.
- Enter a name for the search, indicate whether or not you want the search saved as a favorite, and **Save**.

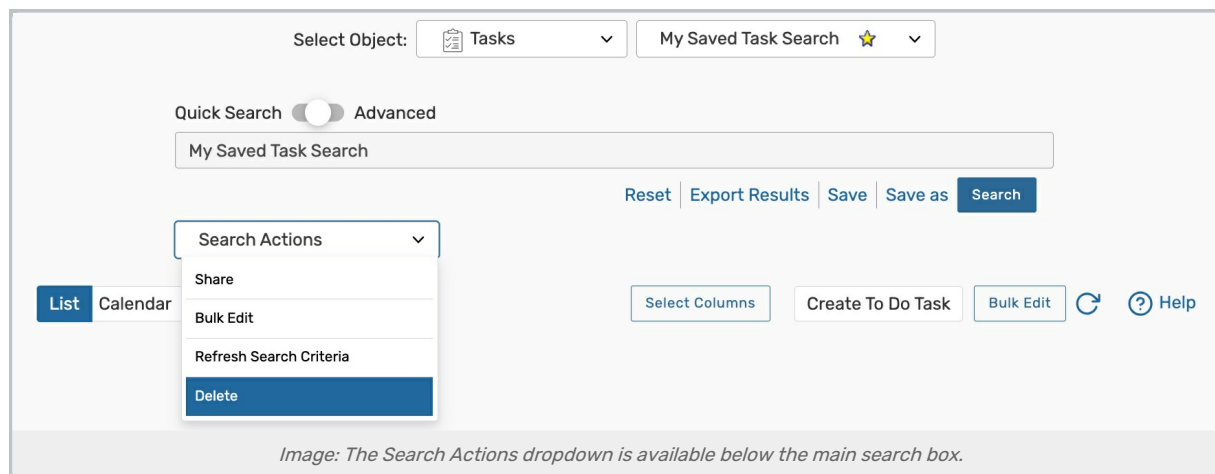
To Rename a Saved Task Search

- On the Tasks page, select the search from the **All of Your Searches** list.
- Use the **Save As** button.
- Enter a new name for the search, indicate whether or not you want the search saved as a favorite, then **Save**.
- You can then delete the original search later.

To Generate a Saved Task Search Report

- On the Tasks page, select an existing search Or run a new search.
- Tap the **Export Results** link under the search bar.
 - The generated report can then be opened in Microsoft Excel or a similar applicaiton.

To Delete a Saved Task Search



- On the Tasks page, select the search from the **All of Your Searches** list.
- Use the **Search Actions** dropdown, then choose the **Delete** option.
- Click or tap **Yes** to confirm the deletion.