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.

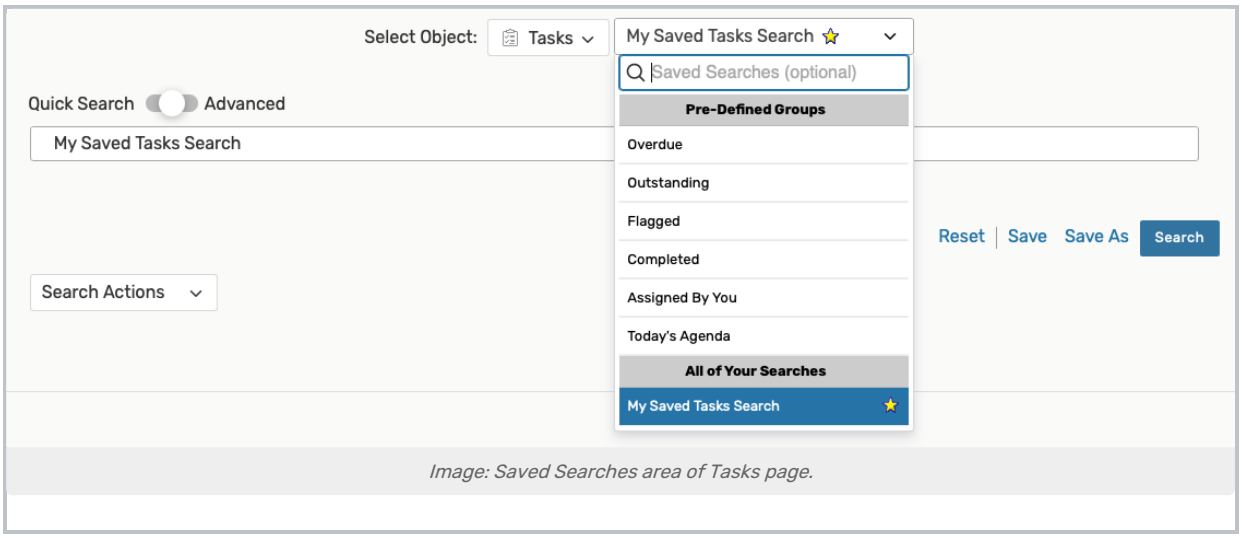

Image: Saved Searches area of Tasks page.

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

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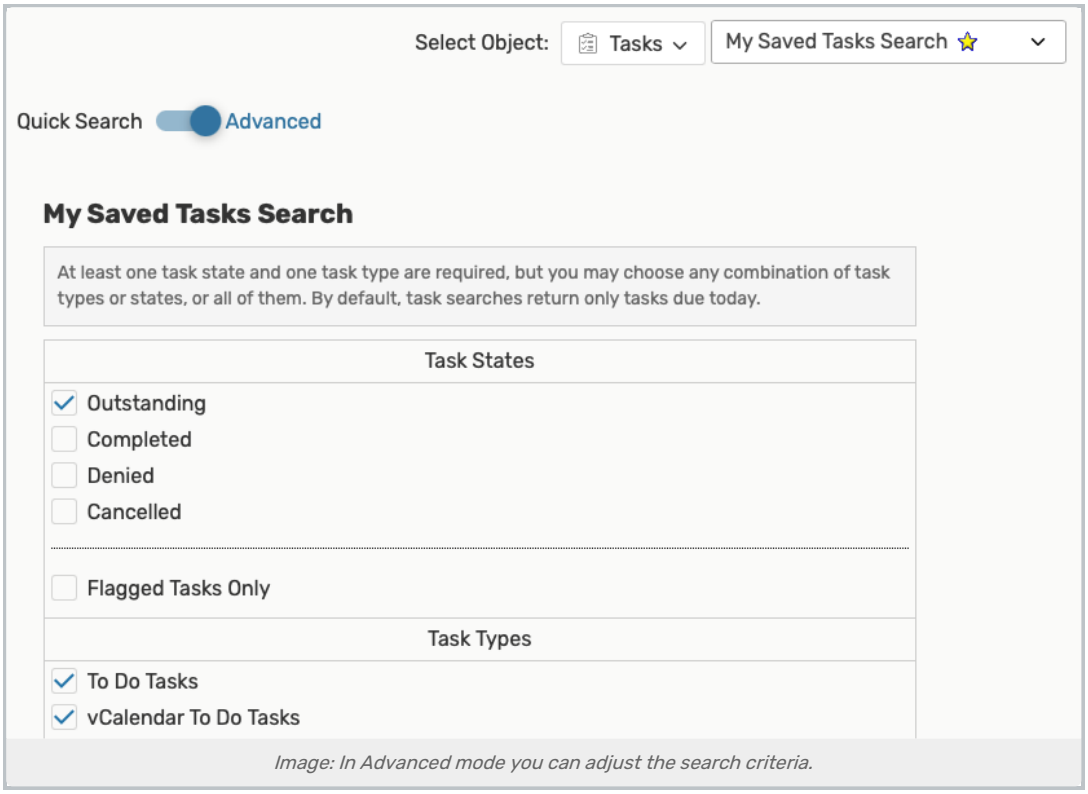

Image: In Advanced mode you can adjust the search criteria.

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 Delete a Saved Task Search

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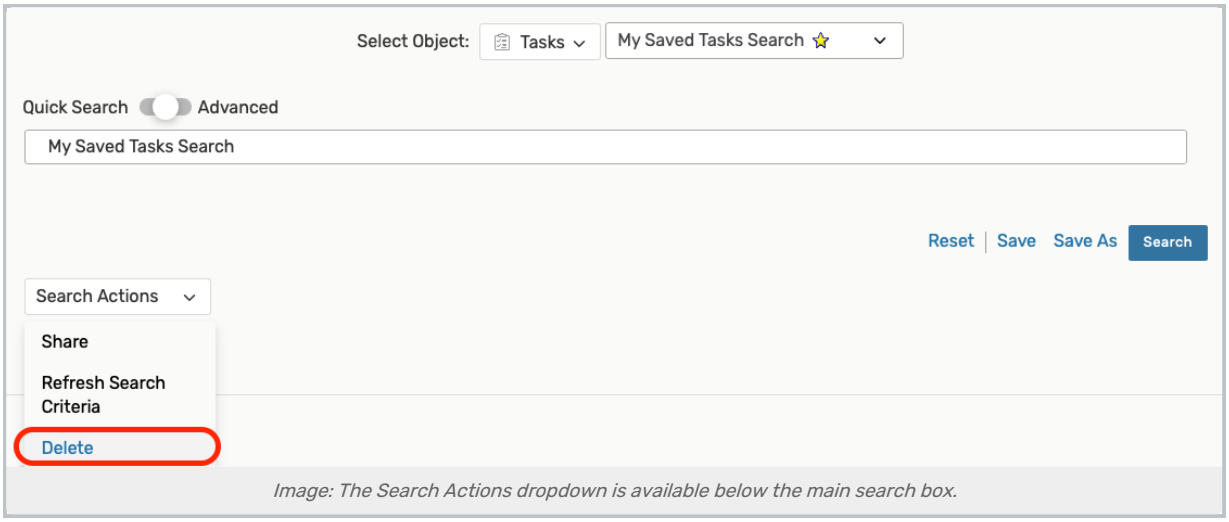

Image: The Search Actions dropdown is available below the main search box.

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.

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