

# Creating a Named Search in Workflow

## Overview

To help you find documents that pertain to your campus and avoid searching through your Action List (which may contain documents that pertain to other campuses depending on your security), you can do a Detailed Search to find documents for your campus in a particular status.

## Steps

### Creating a Named Search

1. Log into OneStart.
2. Click **action list** in the top right corner.
3. Click **Document Search** in the left menu.

The screenshot shows the OneStart web interface. At the top right, the 'action list' link is circled in red. On the left side, the 'Document Search' link in the navigation menu is also circled in red. The main content area displays 'OneStart Helpers' with two sections: 'Tutorial' and 'Where's my Stuff?'. The 'Tutorial' section includes a 'View the Tutorial' link with a green arrow. The 'Where's my Stuff?' section includes a 'Launch Content Finder' link with a green arrow. Below these sections is a checkbox option: 'Do not show this announcement again. This announcement will be put into "My Acknowledged Announcements" on the My Zone tab.' At the bottom of the page, there is an 'Action List' section with a search bar and links for 'Preferences', 'Refresh Action List', and 'Filter'.

4. On the *Document Search* page, click the Detailed Search link.

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Document Search options

**workflow** Detailed Search Superuser Search Clear Saved

Searches Searches

**Search for a Document:**

Document Type:	<input type="text"/>
Initiator Network Id:	<input type="text"/>
Document Id:	<input type="text"/>
Date Created:	from: <input type="text"/> to: <input type="text"/>
Name this search (optional):	<input type="text"/>

5. On the *Detailed Search* page, there are several ways to narrow your search results.

Document Search options

**workflow** Basic Search Superuser Search Clear Saved

Searches Searches

**Search for a Document:**

Initiator Network Id:	<input type="text"/>	Viewer NetworkId Id:	<input type="text"/>
Approver Network Id:	<input type="text"/>	Workgroup Viewer:	<input type="text"/>
Document Id:	<input type="text"/>	Document Route Status:	All
Application Document Id:	<input type="text"/>	Document Route Node:	Select a document type.
Date Last Modified:	from: <input type="text"/> to: <input type="text"/>	Date Created:	from: <input type="text"/> to: <input type="text"/>
Date Finalized:	from: <input type="text"/> to: <input type="text"/>	Date Approved:	from: <input type="text"/> to: <input type="text"/>
Document Type:	<input type="text"/>	Document Title:	<input type="text"/>
Name this search (optional):	<input type="text"/>		

- Next to **Document Type**, click the lookup icon . In the **Document Type Name** field, enter "SIS" and click . Several document types related to SIS workflow (i.e., SIS.SR.DropCourse, SIS.SR.AddCourse, SIS.SR.GradeChange) will appear. Choose the appropriate one for your search by clicking return value in the far right column.

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Parent Document Type:	<input type="text"/>
Climb Hierarchy:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Document Type Name:	<input type="text"/>
Document Type Label:	<input type="text"/>
Document Type Id:	<input type="text"/>
Active Indicator:	<input type="radio"/> Active <input type="radio"/> Inactive <input checked="" type="radio"/> Show All
<input type="button" value="search"/> <input type="button" value="clear"/>	

- Select a **Document Route Status** from the drop-down menu.

Viewer NetworkId Id:	<input type="text"/>	<input type="button" value="search"/>	<input type="button" value="help"/>
Workgroup Viewer:	<input type="text"/>	<input type="button" value="search"/>	
Document Route Status:	All	<input type="button" value="search"/>	<input type="button" value="help"/>
Document Route Node:	All	<input type="button" value="search"/>	<input type="button" value="help"/>
Date Created:		<input type="button" value="calendar"/>	<input type="button" value="help"/>
Date Approved:		<input type="button" value="calendar"/>	<input type="button" value="help"/>
Document Title:	<input type="text"/>	<input type="button" value="search"/>	<input type="button" value="help"/>

- Enter the **Date Created** (entering only a "from:" date will give you anything from that date to the present).
  - Enter a wildcard value in the **Document Title**. For example, enter \*IUKOA\*, to find only documents with your institution in the title.
6. You can also save a search after you have entered your criteria by entering a name in the **Name this search (optional)** field. After you enter a name for the search, click . That search criteria will now be saved in the **Searches** drop-down menu at the top of the page.

# Creating a Named Search in Workflow

Document Search options

**X workflow** Basic Search Superuser Search Clear Saved Searches **Searches**

**Search for a Document:**

Initiator Network Id:	<input type="text"/>	Viewer Network Id:	<input type="text"/>
Approver Network Id:	<input type="text"/>	Workgroup Viewer:	<input type="text"/>
Document Id:	<input type="text"/>	Document Route Status:	Enroute
Application Document Id:	<input type="text"/>	Document Route Node:	Select a document type.
Date Last Modified:	from: <input type="text"/> to: <input type="text"/>	Date Created:	from: 09/30/2007 to: <input type="text"/>
Date Finalized:	from: <input type="text"/> to: <input type="text"/>	Date Approved:	from: <input type="text"/> to: <input type="text"/>
Document Type:	<input type="text"/>	Document Title:	*IUKOA*
Name this search (optional):	IUKOA eDrops Enroute		

Nothing found to display.

7. The next time you enter the *Detailed Search* page, select your saved search from the **Searches** box at the top of the page and click  to retrieve your desired results.

Document Search options

**X workflow** Basic Search Superuser Search Clear Saved Searches **Searches**

**Search for a Document:**

Initiator Network Id:	<input type="text"/>	Viewer Network Id:	<input type="text"/>
Approver Network Id:	<input type="text"/>	Workgroup Viewer:	<input type="text"/>
Document Id:	<input type="text"/>	Document Route Status:	Enroute
Application Document Id:	<input type="text"/>	Document Route Node:	Select a document type.
Date Last Modified:	from: <input type="text"/> to: <input type="text"/>	Date Created:	from: 09/30/2007 to: <input type="text"/>
Date Finalized:	from: <input type="text"/> to: <input type="text"/>	Date Approved:	from: <input type="text"/> to: <input type="text"/>
Document Type:	<input type="text"/>	Document Title:	*IUKOA*
Name this search (optional):	IUKOA eDrops Enroute		

## Other Resources:

Workflow online demonstration/tutorial for Admin Users:

[http://ses.indiana.edu/campusServices/sisTraining/SIS9.0\\_onlineHelp/job\\_aids/sr/eDocs/](http://ses.indiana.edu/campusServices/sisTraining/SIS9.0_onlineHelp/job_aids/sr/eDocs/)