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 one.iu.edu.
2. In the Search box, type “document search” and press ENTER.
3. Click the Document Search (Kuali Rice) task icon.

5. On the Advanced Search page, there are several ways to narrow your search results. You must first select the Document Type.
Creating a Named Search in Workflow

- Next to **Document Type**, click the lookup icon.

- In the document type **Name** field, enter “SIS” and click **search**. Several document types related to SIS workflow (i.e., SIS.SR.DropCourse, SIS.SR.AddCourse, SIS.SR.GradeChange) will display.
Choose the appropriate document type for your search by clicking return value in the far left column.
Creating a Named Search in Workflow

- Select a **Document Status** from the list.
- Enter the **Date Created From** (entering only a “from:” date will give you anything from that date to the present). If no date is entered, the default will be to return results for 30 days.
- Enter a wildcard value in the **Title**. For example, enter “IUKOA”, to find only documents with your institution in the title.

6. **Click Search**. The search criteria will now be saved in the **Recent Searches** box on the **Document Search** page.

![Document Search](image)

7. **Click the star icon next to a recent search to add it to the Favorite Searches section.**
8. The next time you enter the **Document Search** page, select your search from the Recent Searches or Favorite Searches to retrieve your desired results.