Reporting – Saved Searches

These instructions will inform users how to save search criteria to easily retrieve data from Oracle Fusion. Audience: All	Additional Resources: • GMHEC - Knowledge Base • Projectensemble@gmhec.org • Support@GMHEC.com

Process Step & Description	Action
1.1 Overview	(see below)

Saved Searches – a powerful tool allowing users to search for data, customize the output, and download the data within many functional areas.

Features:

- Customizable
- Personal settings can be saved
- Easily downloaded to Excel
- Found across many functional areas, usually in the **"Manage** ***functional area*****"** link

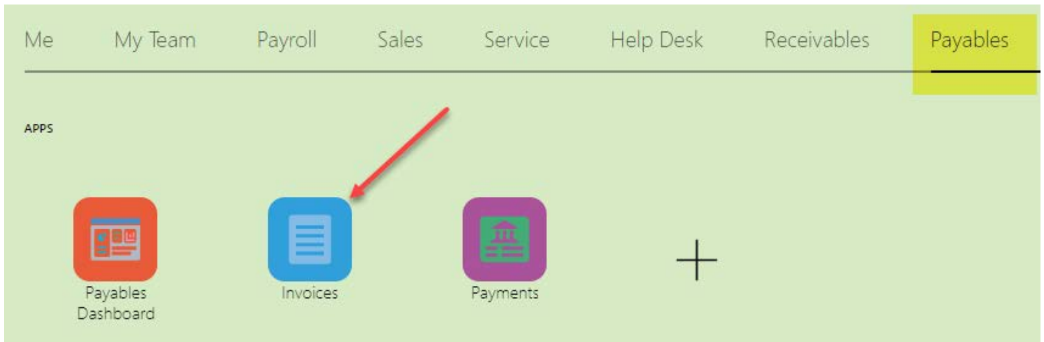
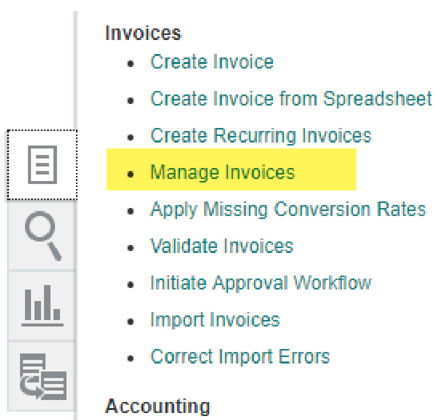
Steps Outlined Include:

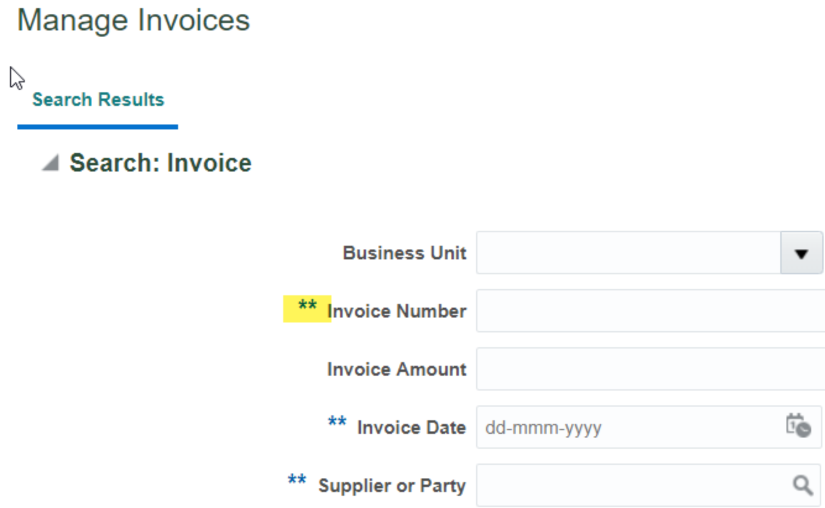
- Where to find Search functionality
- Overview of the Search Screen
- Using Selection Screen options
- Executing Search
- Customizing Search results
- Additional Features
- Saving Custom Search

Tip! Areas you'll find this functionality for include:

- Invoices
- Expenses
- Payments
- Requisitions
- Suppliers

Created:3/25/19
Revision :

1.2 Saved Searches – where and how to find	From Home page, **Navigate to the relevant functional area**. For example:  o Explore the Task menu – Choose Manage Invoices **Tip! Use the Task icon to go the “Manage xxx” area in each functional area** 
1.3 Saved Searches – Overview of Search Screen	• Once on the “Manage xxxxx” screen, the top section will display an assortment of fields that are either optional or required to execute any search:

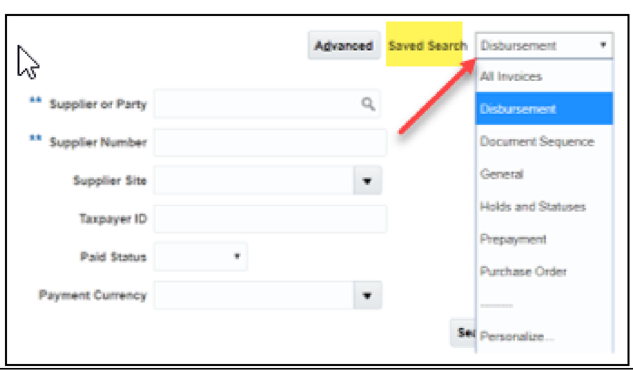


- If a field is marked with a Single Asterisk, it is REQUIRED.
- For all fields marked with a Double Asterisk, at least ONE of them must be populated. In the example above, either Invoice Number, Invoice Date, or Supplier or Party MUST be populated. (and more than one is fine).
- When selecting values for these fields, use the Search magnifying glass as needed.

Tip! The "Advanced" search within the search popup is the most effective

1.4 Saved Searches – Review Selection Screen Options

- **What if the data point you want to search/filter by is not available on the screen**?
  - Check if any of the standard Saved Searches will meet your requirements!
  - On the righthand side of the search screen, look for "Saved Search" with a dropdown:



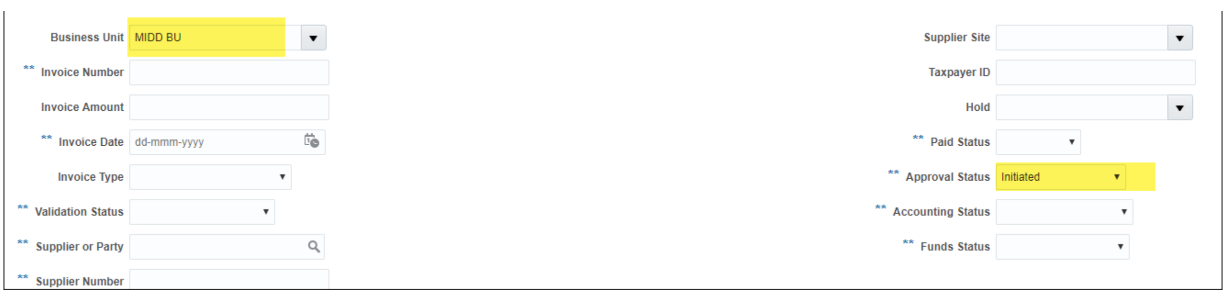
<table>
<tr>
<td></td>
<td>These options come standard from Oracle and contain the likeliest search fields for each topic in the list. Please explore these and choose the one that most closely matches your needs.

(you will have one more opportunity to filter the results, after executing the search)

Alternatively – add individual fields to the filter criteria yourself:

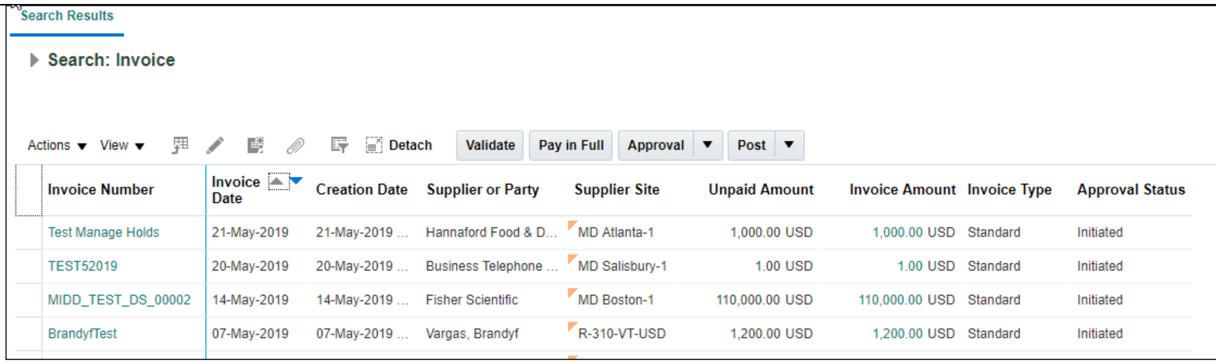
• Click ADVANCED in the upper right corner
• Click ADD FIELDS on the middle right side to show a list of fields you can choose to add, and select what you need</td>
</tr>
<tr>
<td>1.5 Saved Searches – Executing Search</td>
<td>From here, you will enter in all the selection criteria values you need to get the results set you are looking for.

In this example, the user is looking for all invoices with Approval Status of Initiated, for the Midd BU.



Now, click the SEARCH icon.

Tip! Be aware of how many records your search may return; limit the number for best system performance.</td>
</tr>
<tr>
<td>1.6 Saved Searches – Customizing Search Results</td>
<td>The results of your search will look something like this:</td>
</tr>
</table>



The columns displayed are the default format for the system standard Saved Search you chose. **There are now several ways to customize the search results!**

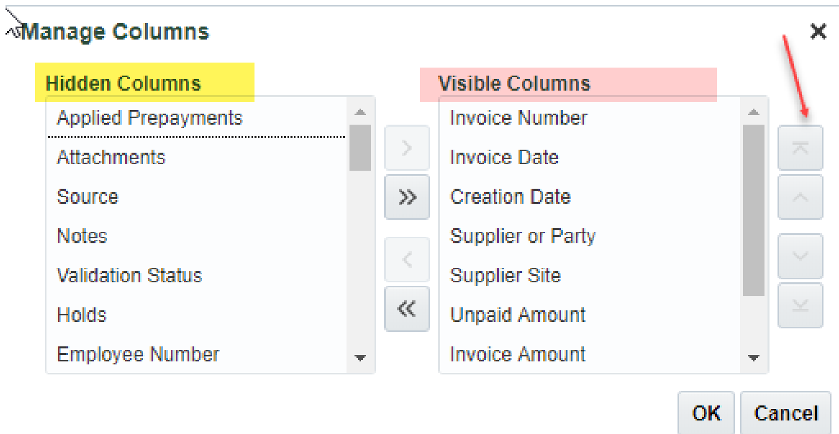
1. **Columns** – Change the columns that display, and the order they are displayed in:

   a. In the header above the results section, go to *View / Columns / Manage Columns*:

   b. This pop up will allow you to move columns from “Hidden” to “Visible” and vice-versa using the arrows in the center.

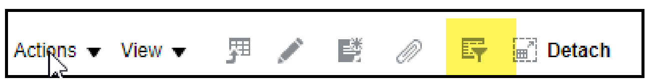
c. Additionally, when a field in the Visible section is selected, the arrows on the right side can be used to change its position in the list.

d. Click OK and your changes will be reflected in the search results.

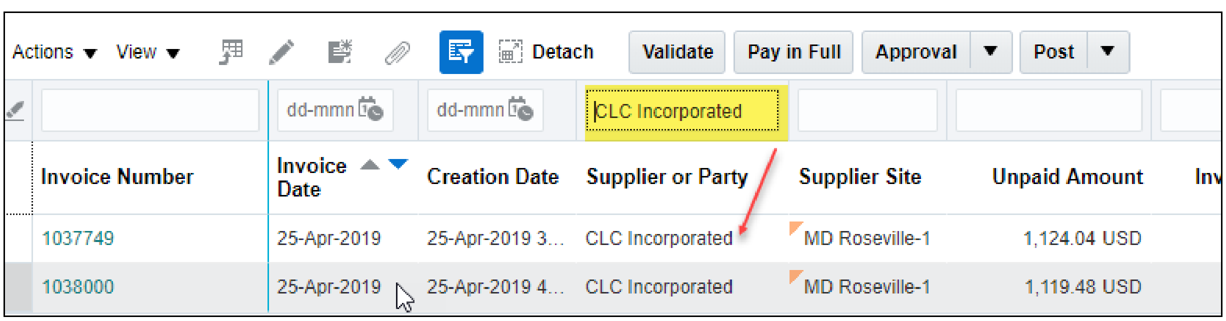


2. **Filter** – Further restrict the search results by individual values:

a. Click the "Query by Example" icon:

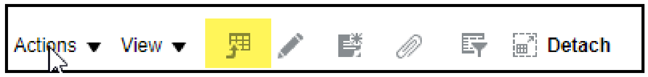


b. This will provide cells above each column where a value can be entered. Just click ENTER and the search results will now reflect the new filter value:



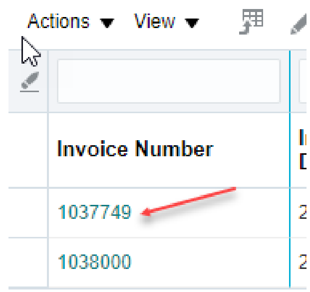
Additional Features:

- Download to Excel – click **Export to Excel icon,** and a download is created instantly.

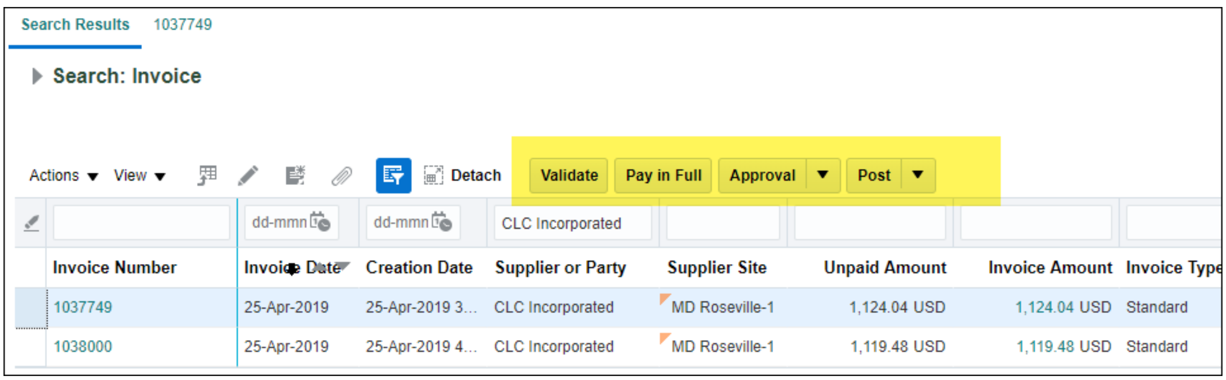


1.7 Saved Searches – Additional Features

- See **Transaction level detail –** click into the hyperlink for the document number. Once the detail is viewed, click "Search Results" in the upper left-hand corner to return to the results.



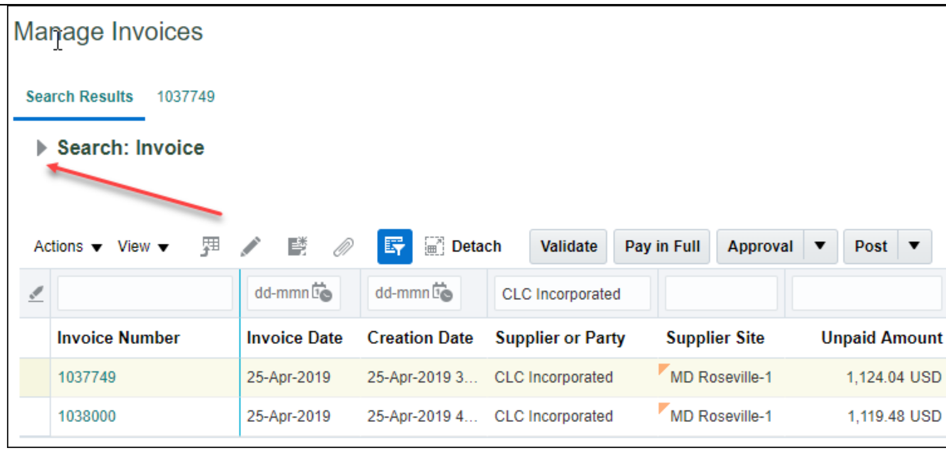
- **Take action** on individual line items: Highlight one record in the list, then click these Action icons (not all are available based on the status of the transaction)



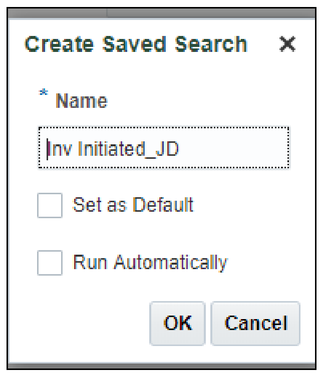
1.8 Saved Searches – Saving The Search

Now that you've created the perfect custom search, save it to be used in the future!

First, Expand the Search information section by clicking the arrow next to "Search: Invoice"



On the right hand side, click the **SAVE** Icon. The pop up will allow you to give your search a name and choose if you would like it to be the default view, and if it should execute automatically.



The next time you come back to **"Manage *functional area*"** just use the dropdown next to Saved Searches to choose your custom search.