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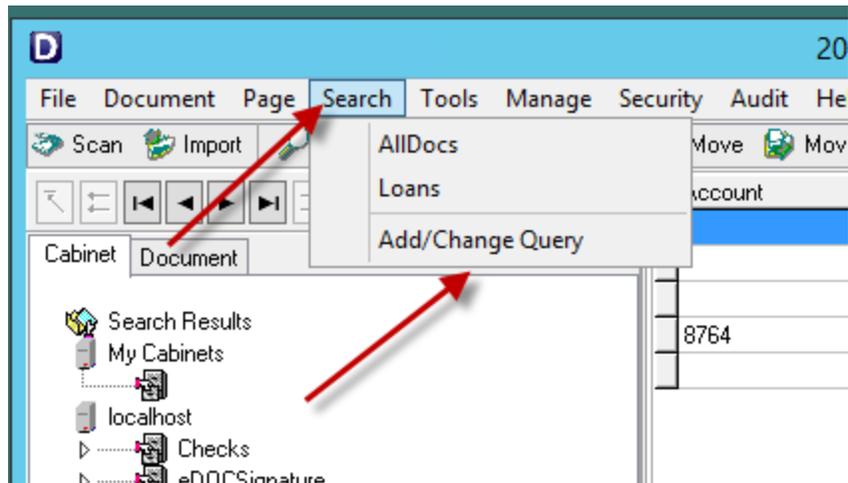
Tech Tip #37: How to Set up Predefined Searches in idocVAULT & 2020DOC

CU Admins –

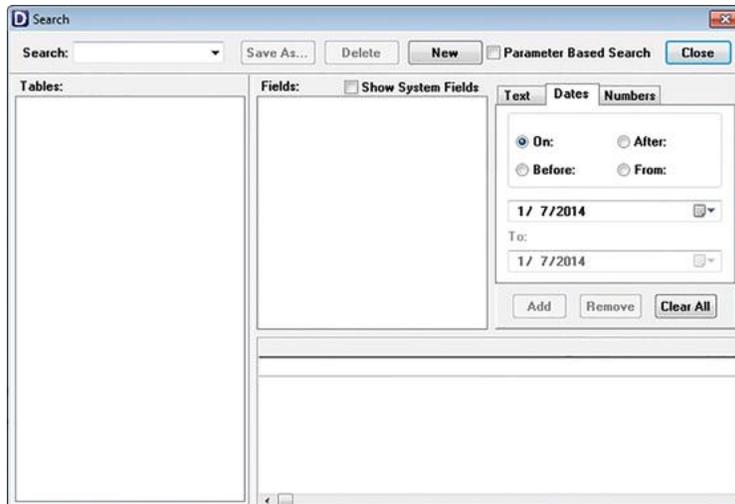
Searching idocVAULT can be simplified by adding a one-click button using the custom search functionality in 2020DOC. This is beneficial for staff who search for the same details, such as a form type or date range, numerous times a day.

*****These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.*****

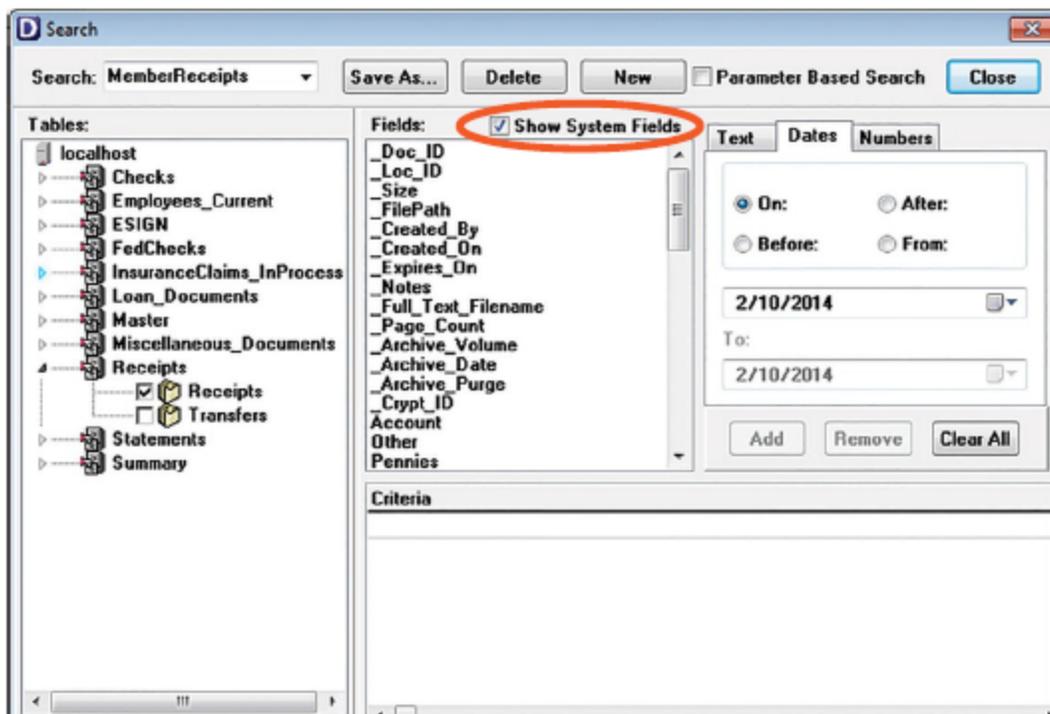
Setting up a one-click button is very easy for anyone with administrator credentials. The first step is to open 2020DOC, click the **Search** tab, and click **Add/Change Query**.



To add a predefined search, click **New** to open a new Search window.

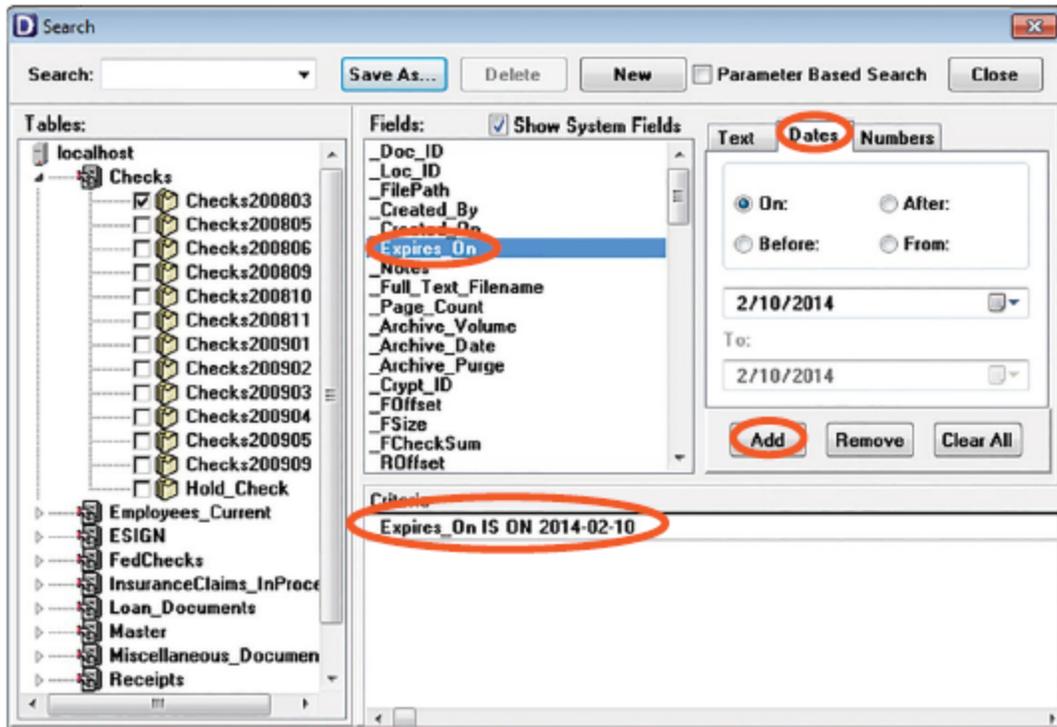


In the Tables window, check all the tables you want to search. Fields that are common among all the tables checked will display in the Fields window. If any of the data is located in hidden system fields, check the **Show System Fields** box to display ALL fields.

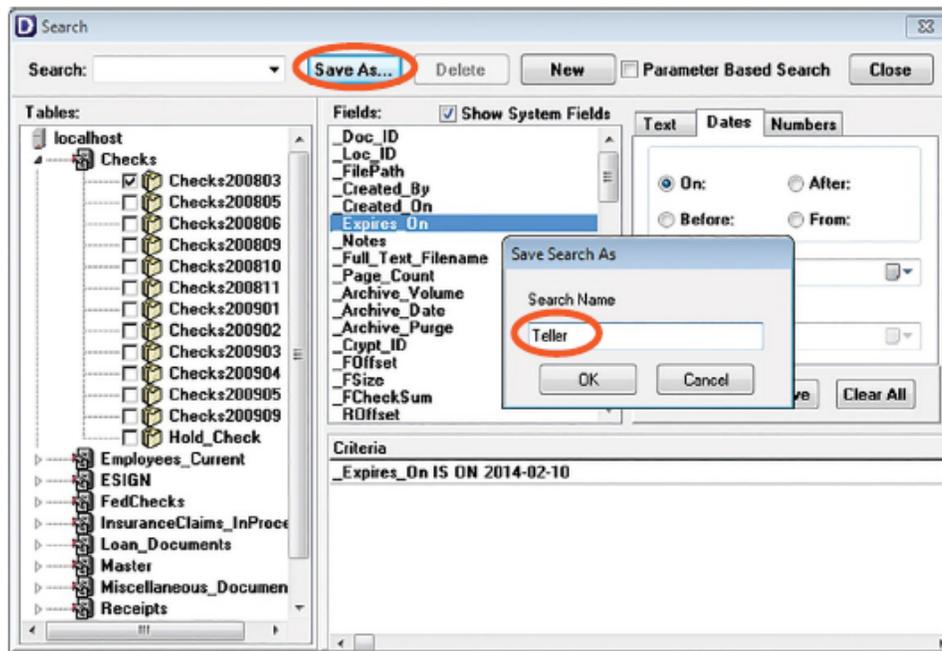


In the Fields window, highlight the field(s) you want to search. Based on the data type of the field selected, one of the field type tabs (Text, Dates, or Numbers) displays on top. To fill in the criteria for the field selected, click **Add**. This places the

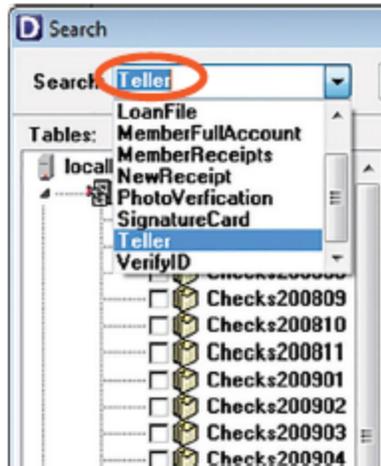
newly defined search criteria into the Criteria window. Continue this process until all the criteria you want to search for is in the Criteria window.



When finished, click **Save As** to open the Save Search As window. Enter the name of the predefined search.



Click **OK** to add the new predefined search to the Search drop-down list. This will now show your selection as a new search in 2020DOC and new tab in idocVAULT under the Documents tab.



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