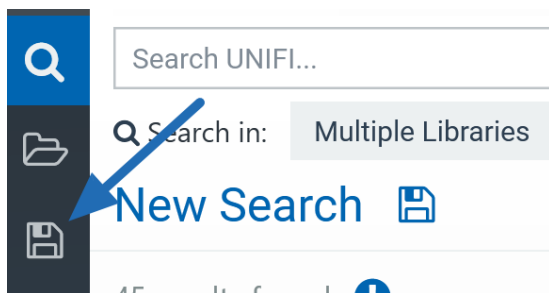


Saved Searches

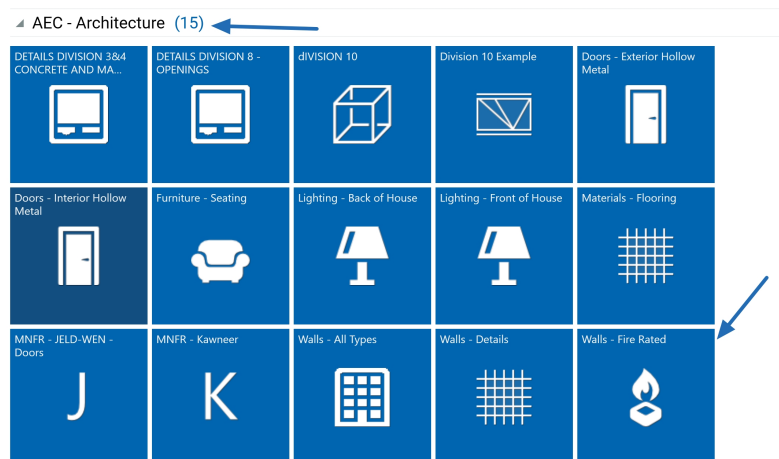
Last Modified on 02/13/2023 4:39 pm EST

Saved searches increase efficiency for you and your team by allowing you to create pre-defined search criteria. This prevents users from having to type in search queries with complex filters or remember exactly how to find content by browsing through libraries and model categories.

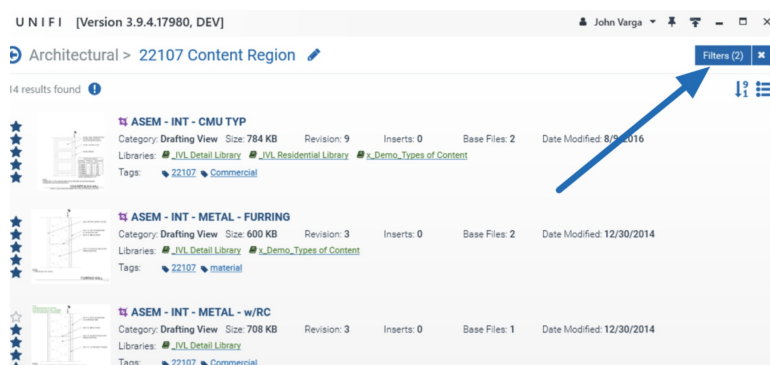
To get to a saved search, click on the **Saved Search icon** on the left side of the screen.



Notice that you have Company Saved Searches and your Saved Searches. Only Company Admins can create Company Saved Searches. You can click on the category you want (in the example below, Architecture) and then the saved search (for example, Fire-Rated wall).



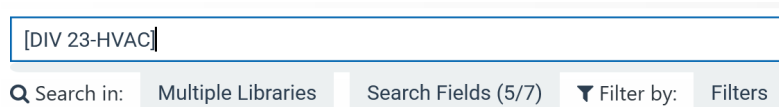
This is a saved search where the admin has identified a set of families here that are maybe less intuitive to find using the other search methods (for example, there isn't a fire-rated wall tag or the title doesn't include the words fire-rated wall). This prevents your team from having to remember which library or which model categories certain families belong to or even which tag to search for. When viewing this saved search, you can also apply additional filters to it by selecting the **Filters** button in the top right of the screen:



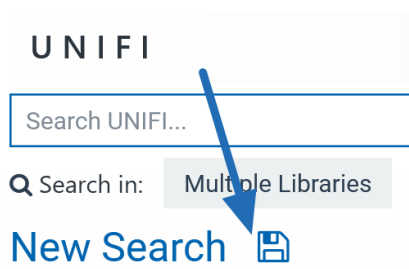
Create a Saved Search from an Existing Search

There are two different methods that you can use to create a Saved Search.

For example, let's say that you conducted a [standard search](#) and applied certain filters to that search.



If you'd like to save that particular search, simply click on the floppy disk icon below the search bar to save your search.





Where it says **Saved Search Name**, enter the name of your search.


Here's a great tip we got from one of our customers: Saved searches are organized alphabetically, but if you want a search to appear at the top, you could use a number system before the file name. For example, one of our customers titled the top searches "00- BIM execution plans", "01 - Project templates", "02 -Family Templates", "03-Sheets", etc. This makes sure that these searches appear at the top for all users.

Once you've named your saved search, you can then select the group this search is for. All groups ending in "(Company)" are accessible to all within your company, and those without "(Company)" are your personal saved searches. Remember that only admins can create company searches.

If you want to enter a new group, select the plus sign next to the **Select Group** dropdown menu.

Saved Search Name:	<input type="text" value="enter name here"/>
Select Group:	AEC - Architecture (Company) 
Libraries to Search:	Multiple Libraries 
Search Term:	[DIV 23-HVAC] piping

Next, type in the group name and then select **Ok**.



New User Group

×

Enter new user group name

Ok


Cancel

UNIFI has already completed many of the other fields based on your search parameters, but you can also modify your filters here. For example, you can identify particular categories, file types, and even original authors that you want to be included in this saved search or you can also modify the search so that you are only looking at your favorites.

Saved Search

Saved Search Name:

Select Group:

AEC - Architecture (Company) 

Libraries to Search:

Select a Library...

Search Term:

Search Fields:

☒ File Name

☒ Family Type Name

☒ Family Category

☒ Material Class

☒ Tags

☐ Parameter Name

☐ Parameter Value


Filters:

Configure Search Filters

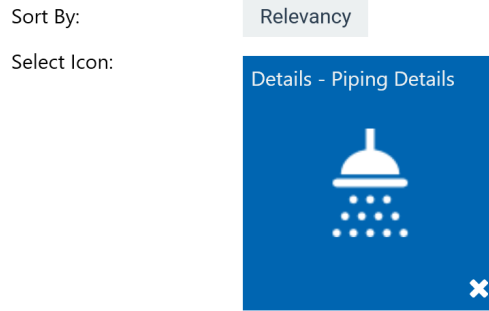
Sort By:

Relevancy

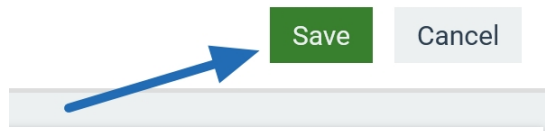
Select Icon:



You can create a default sort for the search results. For example, results could be sorted based on popularity (in other words, how often it's inserted in your company). You can also assign a particular icon to this search.



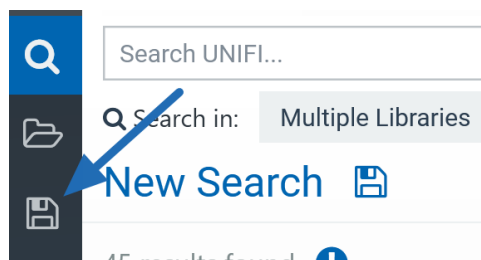
Once you're done, click **Save** in the upper right corner of the screen.



The benefit of saving from a set of search criteria like this is that the fields are already filled out based on your search.

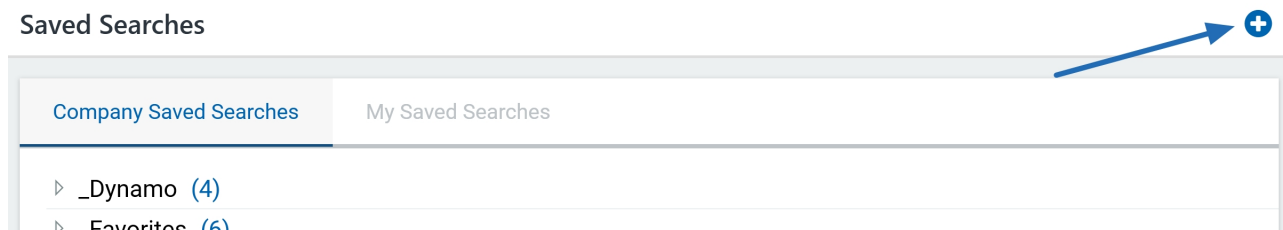
Create a Saved Search from Scratch

The second way to create a saved search is to create a saved search from scratch. To do this, click on the floppy disk icon on the left-hand side of the screen.

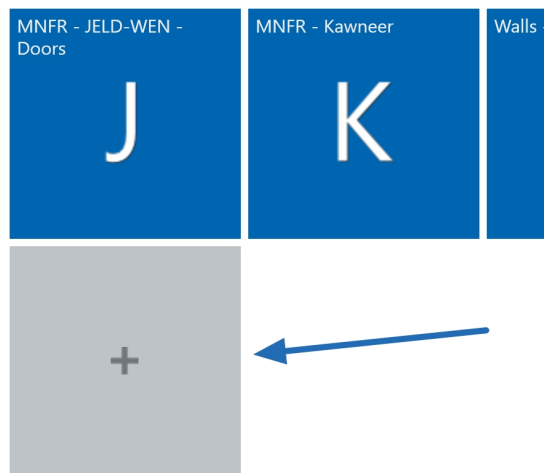


Decide whether you want to create a Company Saved Search or a Personal Saved Search. If a group does not exist that you'd like to save your search under, select the plus (+) icon on the top right of the screen to create one.

Saved Searches



After your Saved Search group has been selected, select the gray box with the "+" to create a new saved search.



Here you'll have a blank slate to enter all of your search criteria.

Saved Search

Saved Search Name:

Select Group: AEC - Architecture (Company) +

Libraries to Search: Select a Library...

Search Term:

Search Fields: ☒ File Name ☒ Family Type Name ☒ Family Category ☒ Material Class
☒ Tags ☐ Parameter Name ☐ Parameter Value

Filters: Configure Search Filters

Sort By: Relevancy

Select Icon:

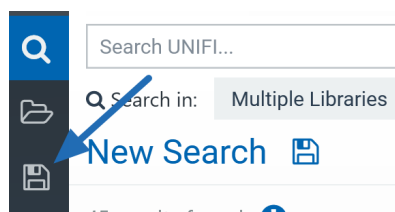
When finished, select **Save** in the top right of the screen.



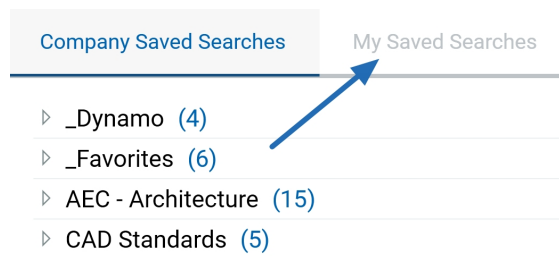
Making a Personal Saved Search a Company Saved Search

It takes only a few quick steps to create a company-wide saved search. And remember, to make a company saved search, you'll need to be a company admin.

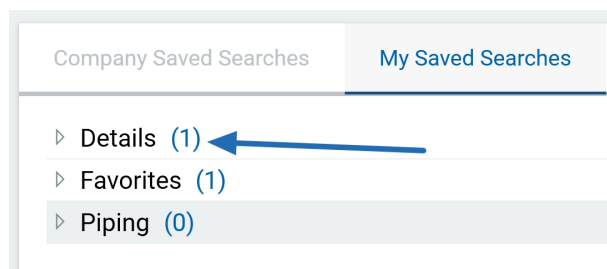
First, click on the floppy disk icon on the left side of the screen.



Then select **My Saved Searches**.

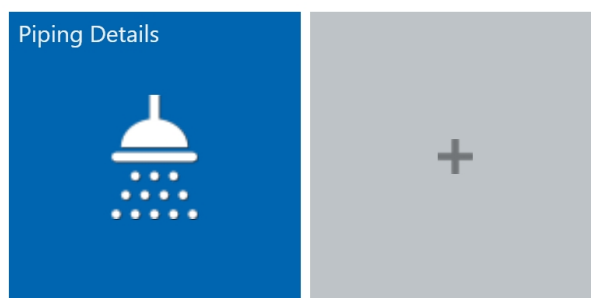


Click on the group name that your search is saved in.



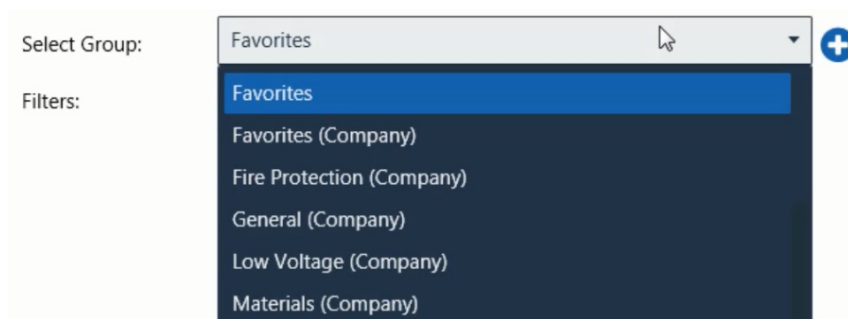
Next, right-click on your saved search.

Details (1)

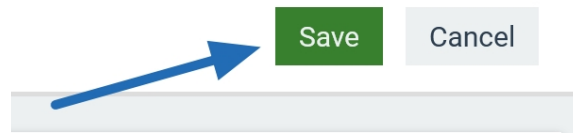


Now heads up: if you want to create two different searches that have slight variations (for example, one client of ours had one saved search for interior hollow metal doors and another saved search for exterior hollow metal doors), you can duplicate the search here and make those slight tweaks. In our example, we are not going to duplicate the search; we are just going to select **Edit**.

From the **Select Group** section, select the appropriate group with “(Company)” in parentheses.



Then click **Save** in the top right of the screen.



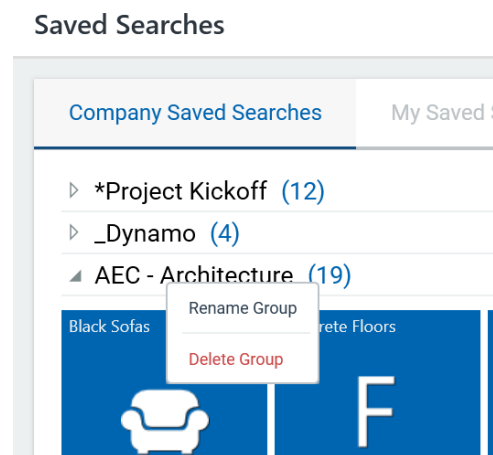
And now your saved search will appear in the Company Saved Searches section.

If you are a Company Admin, and you'd like an End User's saved search to be a company-visible saved search, you have two options:

1. Record the search criteria of the End User's saved search and make a new one as a Company Admin
2. Temporarily promote the End User to Company Admin so that they can modify the saved search and change the group to a company-saved search group.

How to Delete or Rename a Saved Search Group

To delete or rename a Saved Search group, simply hover over the name of the Saved Search group, right-click, and select either **Delete Group** or **Rename Group** (depending on which you want to do).



Be sure to check out our other articles on finding content in UNIFI by using our [standard search](#) and our [browse feature](#).
