

Searching

Sophisticated search capabilities are responsible for much of the power of Agiloft's automation and rules engine. There are many ways to search, from quick and simple to more complex. At its most basic, a search is a filter applied to find records in a specific table.

For more information, see these related articles:

- [Quick Search](#)
- [Using Saved Searches to Work Efficiently](#)
- [Creating Saved Searches](#)

Where are searches used?

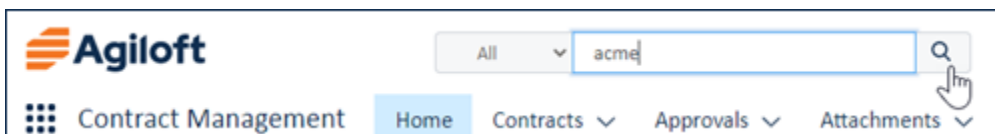
Searches are used in many ways and are crucial for:

- Triggering automation, such as email notifications, field updates, and escalation behavior.
- Defining the records to be included in reports.
- Finding records that need to be worked on.
- Defining a list of values available to select for linked fields.
- Defining the records that appear on the power user home page.
- Defining group permissions for view/edit access to specific records.
- Setting field values automatically based on specific search criteria.

Where are searches created and run?

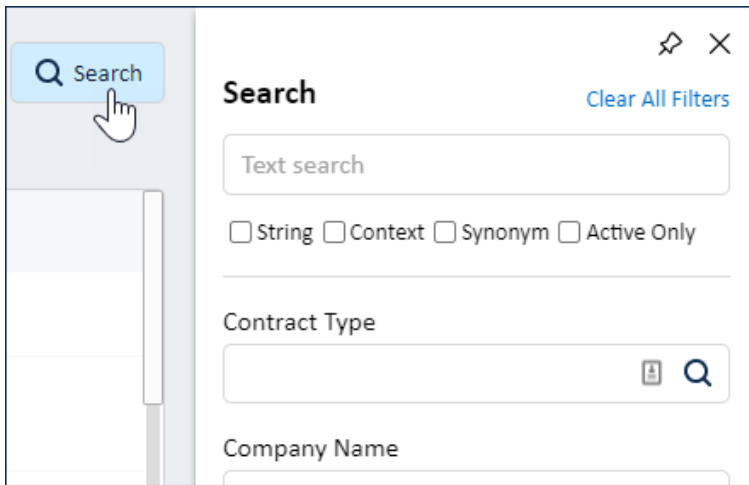
There are four main ways to initiate searches:

- Using the Global Search box at the top of the screen. By default, this searches the system based on your location when you initiate the search: If you use the search from inside a table, it searches that table by default, while if you search from anywhere else, it searches all the tables in the system. You can also use the drop-down to select a specific table to search, or to select All. For example, you might want to search all tables for records associated with a particular company.



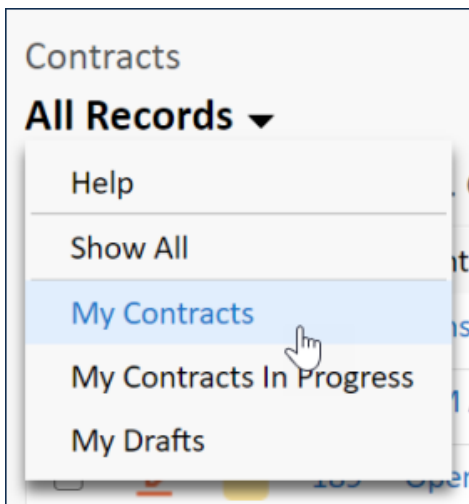
Global search bar

- Using Quick Search in the table view action bar to run a simple search. This is often the quickest way to find records of interest while working. For example, you might want to find all contracts associated with a particular company. For more information, see [Quick Search](#).



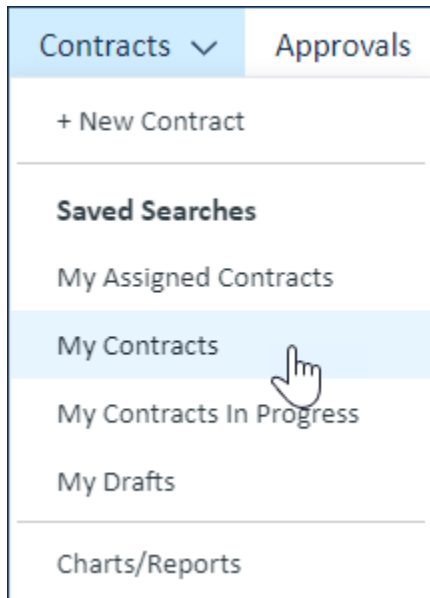
Quick Search button and bar

- Using the saved search drop-down menu. From there, you can select active saved searches or click New to build your own, depending on your permissions. For more information, see [Creating Saved Searches](#) and [Using Saved Searches to Work Efficiently](#).



Saved search drop-down

- Using saved searches from the left pane. Saved searches can be added to My Assigned, and to the expanded table menu, from the Apply tab of the saved search wizard.



Contracts drop-down saved
searches