


How to Administer Saved Searches for Others

Summary

In this guide, Administrators will learn how to manage Saved Searches for other users in the InfraWare Management Console (IMC).

Before you Begin

Before you begin, please be aware of the yellow circles with question marks in them. Clicking these images  will bring up information about the area on the page with which they are associated.

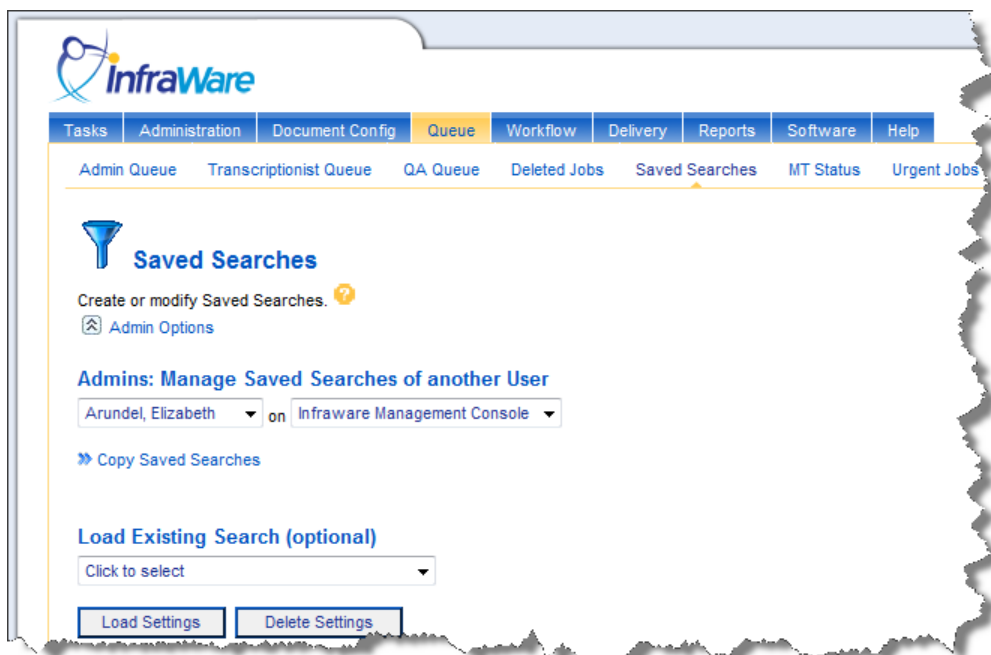
Saved Searches are a powerful feature built into the Queue tab of the InfraWare Management Console (IMC) and the Reports tab of the EHR Web Portal. Users can create as many Saved Searches as needed to quickly display jobs meeting certain criteria, and Administrators can manage the Saved Searches of users under their account. Saved Searches are unique to each InfraWare user. In addition to identifying which jobs are displayed, a Saved Search can include which columns are included on the Queue page and the order in which the displayed jobs are listed.

You will need the following before you begin:

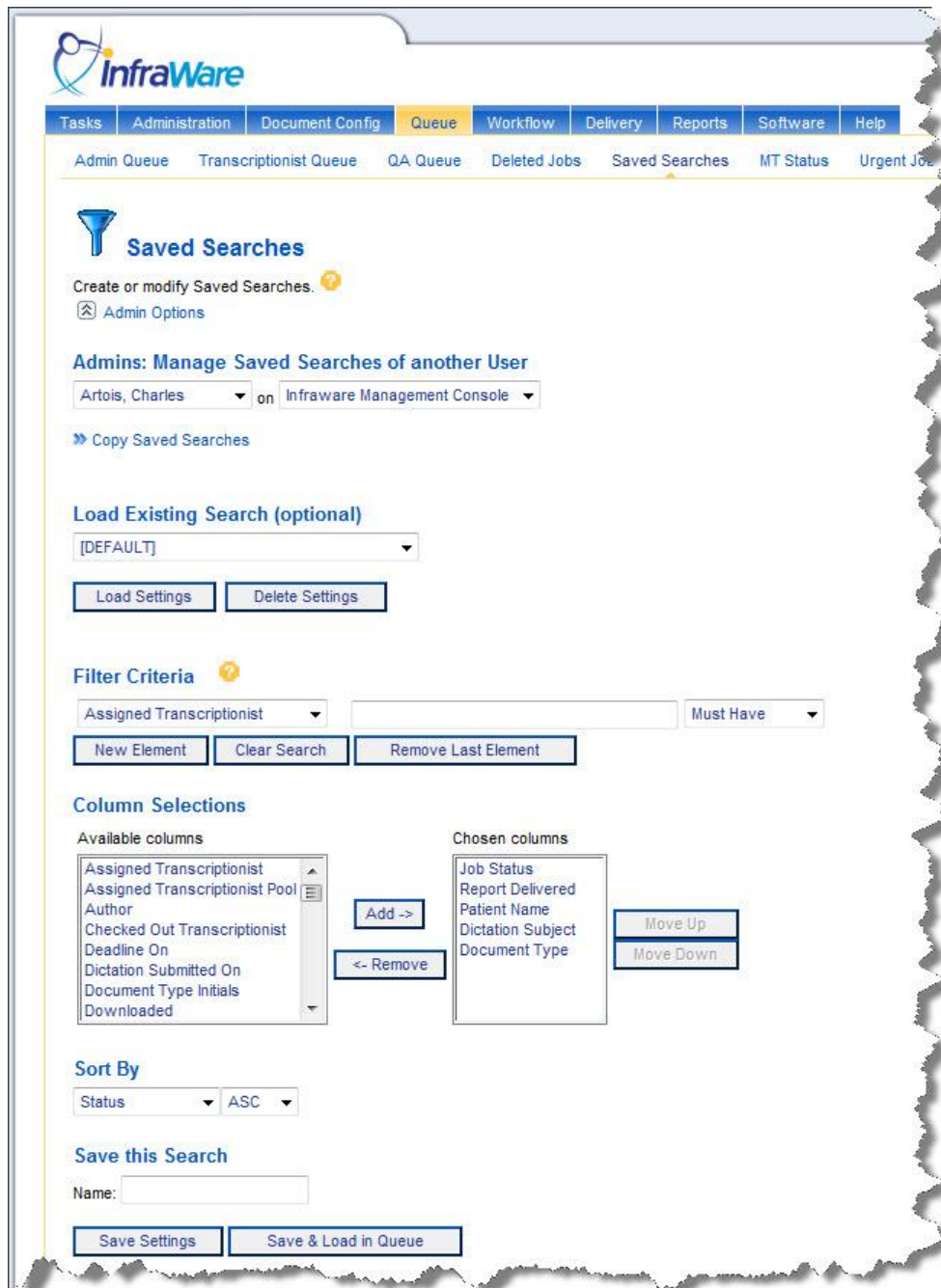
- An Administrator login ID and password for the IMC

Tasks

- Log in to the IMC at www.InfraWare.com/IMC
- Click the Queue tab, and select the Saved Searches sub-tab.
- Click down arrows to expand the Admin Options.



- Select the User for whom you need to create or modify a Saved Search.
- Select the program they will use (usually the EHR Web Portal for facility users).
- If modifying an existing Saved Search, select it from the Load Existing Search drop-down box.



Note: Under this heading, one of the options is [Default] which exists for each user. This is the criteria which is applied upon initial loading of the list of jobs each time the page is loaded. You can modify this Saved Search to accommodate each user's needs. A common example for a facility user is that they need to see all newly completed documents. (Completed but not previously downloaded.) That is the example that will be demonstrated here.

Note: To keep the Queue operating quickly and displaying only relevant information, the Queue is already filtered by the Date Range criteria *before* Saved Searches are evaluated.

- Select the Filter Criteria

Under the Filter Criteria heading, there are drop down menus where you can choose from several different options. After selecting an option from the first drop down menu, the page will

refresh and a second level of drop down menus will reveal that includes the same options as the drop down menu above it. The reason for these menus is to filter criteria for the search you are saving.

➤ Column Selections

Under the Column Selections heading, there are two boxes: Available Columns and Chosen Columns. Highlight the option that you want to choose and click the Add button to move that option to the Chosen Column box. If you want to move more than one option at a time, you can hold down the CTRL button on your keyboard and click multiple options.

➤ Sort By

Near the bottom of the page is the Sort By heading with two drop down menus. The first drop down menu is Status, which you can choose a status of the following: Delivered, Patient Name, Subject, or Document Type. The second drop down menu is where you can choose from either ASC or DESC.

➤ Save this Search

Lastly, you can save your search by naming it in the space provided. Remember to use the special name: [DEFAULT] if you want this to define how the job list initially loads for this user.

After you have made adjustments and settings to the search, click the Save Settings button at the bottom of the page.

An alternative method of managing Saved Searches for other users is to use the Copy feature. In this case, the Admin creates the desired Saved Search under their own login. Then, they copy the Search to one or more users. To use this method, click the Copy Saved Searches link under the Admin Options on this page. Then, select the users you want to add the Search to.