

Imagine Searching Documents

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Background

As part of their business processes, users frequently search for documents within the system using the same type of value (i.e. student id, student name, PO number, voucher id, etc.). These types of searches are quite easy as they just require one field, whether an Index Value or a Custom Property. The Quick Tab in the Perceptive Content Explorer is used for these searches. Given these searches are constantly used, we recommend that they are saved as Private Filters. A filter allows users to save a predefined subset of documents or folders from its parent view (Workflow view or Documents View) and simplify the number of rows returned.

Private Filters

Private filters allow users to save a search under a Workflow view or under a Document View in Perceptive Content Explorer. If the appropriate privilege has been granted, users can create as many private filters as needed; however, we recommend limiting the number of private filters to those that are really needed for the business processes. If the list of private filters is too large, we recommend reviewing it and deleting some of them as needed. **Note** that no other users can see your private filters under the Document View unless they have been granted the Manage privilege for the same view. Private filters are created in the Current View toolbar in Perceptive Content Explorer.

Job Aids

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