



# **Work with saved criteria, recent searches, and configurations**

## **Interoperability Matrix Tool**

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# Work with saved criteria, recent searches, and configurations

You can save and update the search criteria and configurations. You can load, edit, and delete the saved criteria and configurations.

## Save the search criteria

On the **Refine Search Criteria** page, you can choose to save or update the search criteria to retrieve it later.

### Before you begin

You must have already added solutions and components on the first page to save the criteria for future reference.

#### Steps

1. Click **Save Criteria** on the **Refine Search Criteria** page.
2. Enter the **Criteria Name** and add information in the **Description** fields. The **Criteria Name** can be alphanumeric and you can add up to 20 characters. The **Description** field can take up to 100 alphanumeric characters. The Interoperability Matrix Tool does not allow duplicate names for saving criteria. **Criteria Name** is mandatory.
3. Click **Update Criteria** to add filters or criteria to be included as part of the saved criteria.
4. Click **Save**. The **Save Criteria** link changes to **Update Criteria** after you save the criteria. You can save a maximum of 10 search criteria.

### Result

When you click **Saved Search**, a **Saved Criteria** pop-up is displayed. The **Recent Search** tab displays your most recent searches.

Each recent saved search is uniquely identified by its timestamp. You can click the timestamp to go to the **Refine Search Criteria** page.

## Saved Search criteria sharing with other users

From the **Refine Search Criteria** page, you can share your **Saved Search** criteria with other users.

The following are the three different methods for saving and sharing the search criteria:

- [Share the criteria while saving](#)
- [Share the criteria after saving](#)
- [View shared criteria](#)

## Share the criteria while saving

From the Refine Search Criteria page, you can share the search criteria while saving.

### Before you begin

You must add the solutions and components on the first page to share the criteria while saving.

### Steps

1. Select the Share checkbox to share the Saved Search criteria.
2. Enter the Username in the textbox for user search and click Add Users.



If the Username does not exist, validation message is displayed.

3. You can look up while using the search user option and submit to share criteria.

## Share the criteria after saving

From the Refine Search Criteria page, you can share the search criteria after saving.

### Before you begin

You must add the Saved Search solutions and components on the first page to share the criteria after saving.

### Steps

1. Click Saved Search option from the home page.
2. Click Share to share the criteria with others.
3. Enter the Username in the textbox to search the users and click Submit.

## View shared criteria

### Before you begin

You must save the solutions and components in the Saved Search.

### Steps

1. You can view the criteria that you shared with other users by setting the Saved Search option as default.
2. Select Username from the Shared By column to view the shared criteria.
3. An email notification will be sent to the shared users notifying about the share.



The update to the original criteria will have no bearing on the criteria that is shared. They are deemed to be separate entities.

## Load the saved criteria

From the home page, you can choose to either search for components or load the

previously saved criteria.

## Before you begin

You must have saved the search criteria on the home page.

## About this task

You can click **Saved Search** to load all of the criteria that you saved earlier.

## Steps

1. Click **Saved Search** on the first page.
2. Click **Criteria** or **Configuration** tab to load the saved criteria or configuration. After you select the criteria name, the criteria will load in the search criteria panel.

## Edit saved criteria

You can edit the saved search criteria that you saved earlier. You can add any new components to the saved criteria or remove the component from existing saved criteria.

## Before you begin

You must load the saved criteria for editing it.

## Steps

1. Load the saved criteria, click the saved criteria link.
2. Click the **Refine Search Criteria** link. You can add or remove the criteria from saved criteria.

## Delete saved criteria

You can delete the saved search criteria.

## About this task

You must have the name of the saved criteria in order to delete the saved criteria.

## Steps

1. Click the delete icon **X** under the **Action** column. The pop up is displayed asking you whether or not you want to delete the saved criteria.
2. Click **Yes** to delete saved criteria.
3. Click **No** to retain saved criteria.

## Save configuration

You can save configurations with any name of your choice for a particular solution. This

helps you to retrieve the configurations later without remembering the complicated configuration ID.

## Before you begin

You can easily retrieve the desired configuration later by looking for the name that you had specified.

## About this task

If you want to refer to the configuration later, you can save the configuration with any name of your choice.

## Steps

1. In the **Results** page, click star to save the configuration. After you save the configuration, the star turns yellow. You can save a maximum of 20 configurations.
2. In the **Tag Configuration** dialog box, enter the name and description to bookmark the configuration for reference. The saved configuration name is displayed on the configuration details link. You can add multiple configurations to a particular tag. A tag is unique to a single solution. Different users can use the same tag name.
3. Select the tag name from the drop-down arrow to add configurations to an already saved tab.

## Subscribe to configurations

You can subscribe to configurations with any name of your choice for a particular solution or component. This helps you to receive updates by email when there is an update or change in the subscribed row. You can subscribe to a maximum of 20 configurations.

## About this task

You can receive the emails for the following instances:

- When components are added to the configuration
- When components are deleted from the configuration
- When notes are added or deleted from the configuration
- When the state of the configuration is changed from supported to any of the additional terminal states – (EOS, Obsolete, and so on.)

## Steps

1. In the **Results** page, click star to save the configuration. After you save the configuration, the star turns yellow. You can save a maximum of 20 configurations.
2. In the **Tag Configuration** dialog box, enter the name and description to bookmark the configuration for reference.
3. Click **Subscribe** to this configuration checkbox.
4. Click **Tag**.

# Unsubscribe the subscribed configurations

You can unsubscribe the configuration from the **Results** page if you do want to receive any more updates.

## Before you begin

You must have subscribed to the configurations from the **Results** page.

To unsubscribe the configuration:

- In the **Results** page, click star to unsubscribe the subscribed configuration. If you remove the configuration from the favorite list, the configuration is automatically unsubscribed.

# Load the saved configuration

You can load the previously saved configurations from the home page. You can view the tag name, description, solution name of the saved configuration.

## Before you begin

You can load the specific configuration by looking for the name that you have specified for that particular configuration.

## About this task

If you have already saved the configuration, you can load them later at any time.

## Steps

1. On the home page, click **Saved Search** option to load the saved configuration.
2. In the **Saved Configuration** tab, click configuration.
3. A mouse hover over the saved configuration displays the configuration name.
4. Click the **Tag Name** and load the configuration.
5. Click **View Details** link to go to the Results page.

# Remove configuration from saved tags

You can remove or update the saved configuration that you do not require.

## About this task

If you have saved configuration from results, you can remove it if you no longer require it for reference.

## Steps

1. Click the yellow star icon to remove or update the saved configuration.
2. Click **Remove** to delete the saved configuration.

After clicking the remove button in pop up, the star icon changes from yellow to white.

## Delete tag names

You can delete the entire tag for saved configurations.

### About this task

Saved configurations can be deleted by removing the tag name. When you delete the tag name, all of the configurations associated with those tags will also be deleted.

### Steps

1. Click **Favorites**.
2. From **Saved Criteria** dialog box, click **Configurations** tab.
3. Click delete icon X under **Action** column.  
The pop up is displayed asking you whether or not you want to delete saved tags and its associated configurations.
4. Click **Yes** to delete tags and its associated configurations.
5. Click **No** to retain tags and its associated configurations.

## Save a recent search

From the Welcome to the IMT page, you can save your recent searches to preserve the criteria for later searches.

### Steps

1. Click **Solution Search** or **Advanced Search**.
2. Select search criteria.
3. Select **Skip to Results** or click **Next** to refine your search criteria and then navigate to the **View Supported Configurations** (results) page.  
A popup dialog informs you that your criteria is automatically saved.

## View recent search criteria

On the **Welcome to the IMT** page, you can load Saved Search criteria to display your recent searches.

### Before you begin

You must have saved your recent searches.

### Steps

1. Click **Saved Search**.
2. Select the **Recent Search** tab to view the recently saved searches.



Your recent searches are displayed.

3. Select the **Search criteria** tab to view your specific saved search criteria.  
Your saved criteria is displayed.

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