How to save time using "canned" searches in ProjectWise

Global Saved Searches are located at the TOP of the Documents folder in PW_ODOT_PROD. Open **ODOT_Saved_Searches**.

Expand Global and then your region to see a list of searches that are already created.

Drag a saved search into File Explorer to save a shortcut (in your F:\ drive) to a specific Global Saved Search for your region.

Rename your shortcut to make sense to you.

When you **double click on your shortcut in File Explorer** – ProjectWise will launch if it's not yet open, and the saved search will be selected. The search results will display in the Details pane of ProjectWise Explorer.

Bonus! – The Global searches will all be expanded in the Folder pane in ProjectWise Explorer so you don't have to navigate.
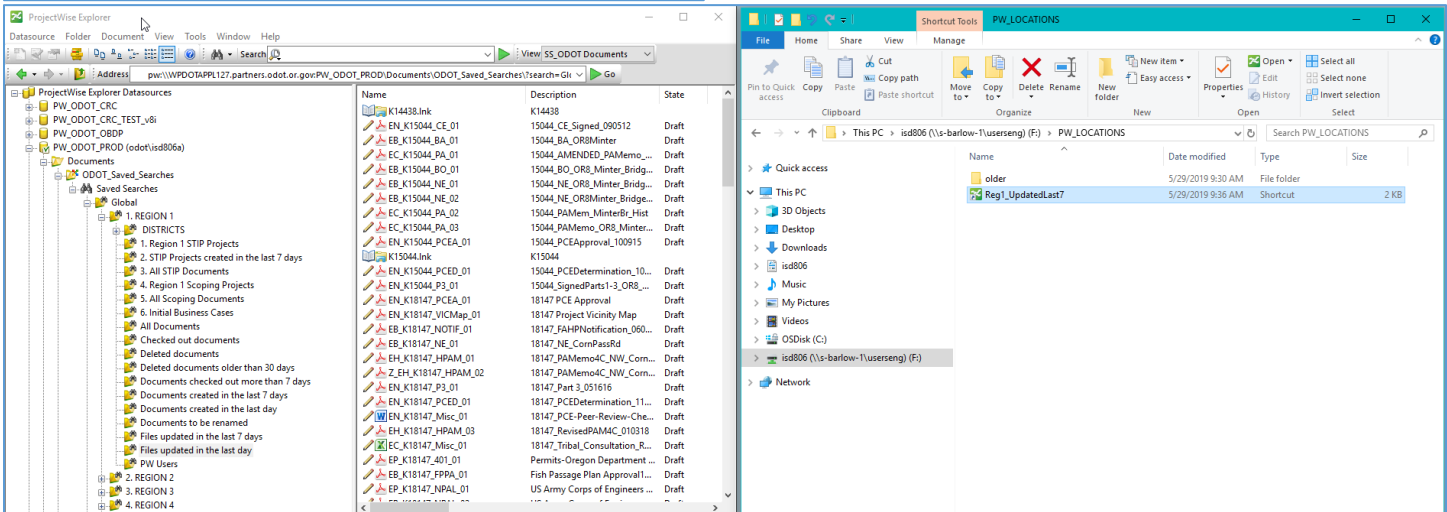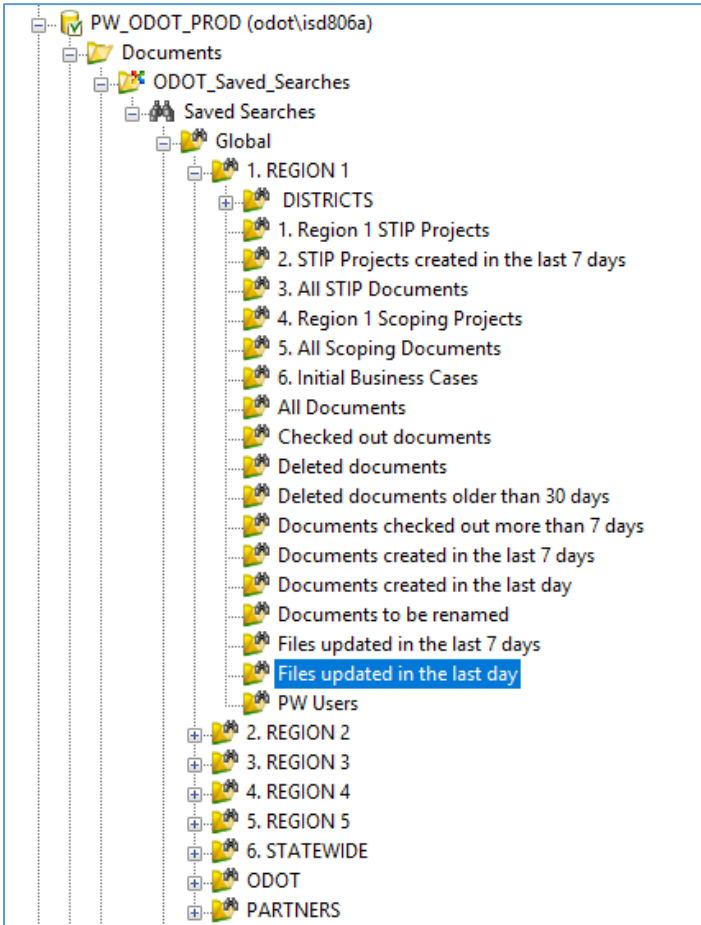
How to go quickly to places in ProjectWise that you've been recently

Use the Navigate Back (or Forward) button on the Navigation toolbar. Ensure that View>Toolbar>Navigation is open.
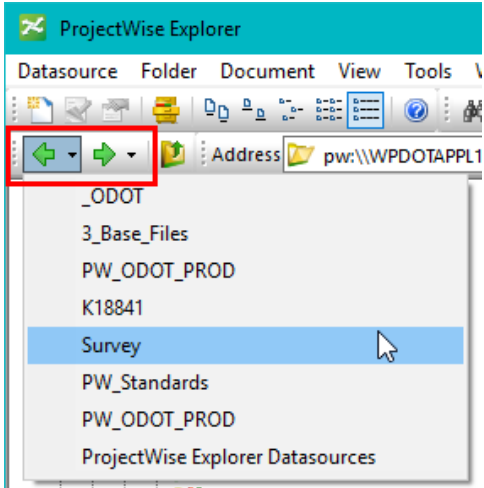
Clicking on the pick list arrow next to the larger green arrow shows a list of recently visited locations. Simply **select a folder name** and your Folder pane will navigate there and display the contents on the Detail pane on the right.

Keep the File Explorer open if working on multiple projects to quickly double-click on a File Explorer shortcut and navigate to that location in ProjectWise.

How to efficiently use the Quick Search to locate projects

The key to efficiency is using a really good starting point for your Quick Search. **Use a ProjectWise shortcut stored in File Explorer** to quickly take you to STIP_Projects or Scoping_Projects so you can do a Quick Search within that location. The default settings are to search from the current folder and below – so a good starting point saves time.

Ensure that View>Toolbar>Search is open.

An asterisk (*) is a wildcard character, if not used, the search will only return exact matches.

Type into the search field and click the green arrow button or hit <Enter> on your keyboard.

Searching on Document and Folder Properties is fastest and will locate documents by parts of the name or description.

Open the Quick Search Settings using the magnifying glass icon inside the Search toolbar.
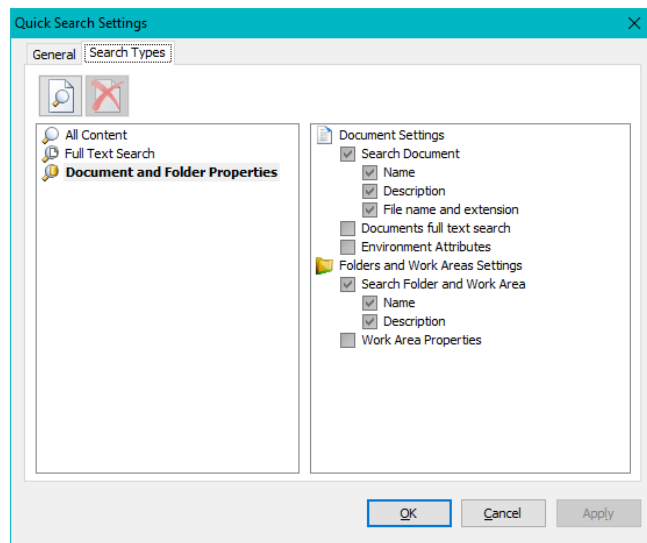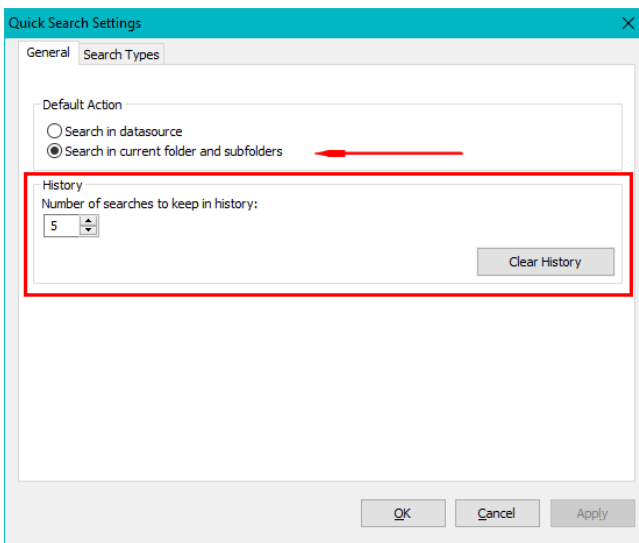

Right-click on a Search Type to "Set as default".

Recommend setting the History to a low value, otherwise you end up scrolling and using your eyes!

Note there is a **[Clear History]** button.

Where to save and how to reuse your searches so that they are quick to locate and don't get lost with all of your other important things

1. **Create a folder** in F:\ (your personal server share) - this will be accessible to you on any computer at ODOT.
2. **Drag and drop** ProjectWise documents, folders or saved searches into this folder to create shortcuts.
3. **Rename** your shortcuts to include key number or familiar project name – or put into a project sub-folder.
4. **Double-click** on a shortcut to go to that location in ProjectWise

Bonus! – Create a Taskbar Toolbar which is a link a folder that you can quickly expand and use without opening File Explorer.
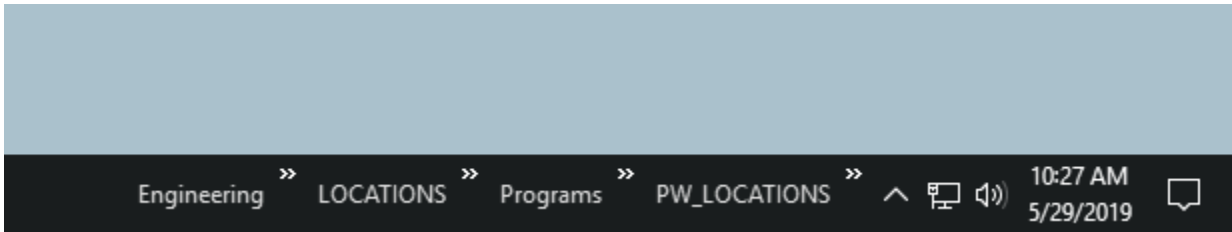

Right-click on your taskbar and choose Toolbars>New Toolbar… - navigate to and select F:\PW_LOCATIONS.

# How to create a personal search to locate your documents that have been recently edited by someone else

Personal searches are saved and located at the very bottom of the ProjectWise Folder pane. Just drag the vertical scroll bar all the way to the bottom and expand Saved Searches>Personal. Personal saved searches are created by using the Quick Search Toolbar, though!
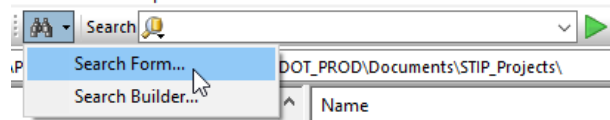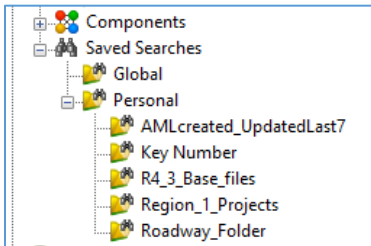
Click on the binoculars icon and choose Search Form... Enter the search criteria on the search form.
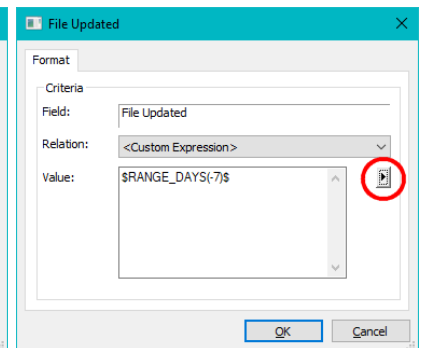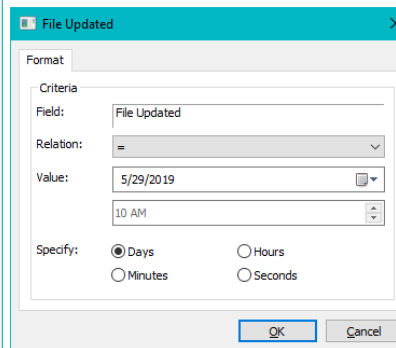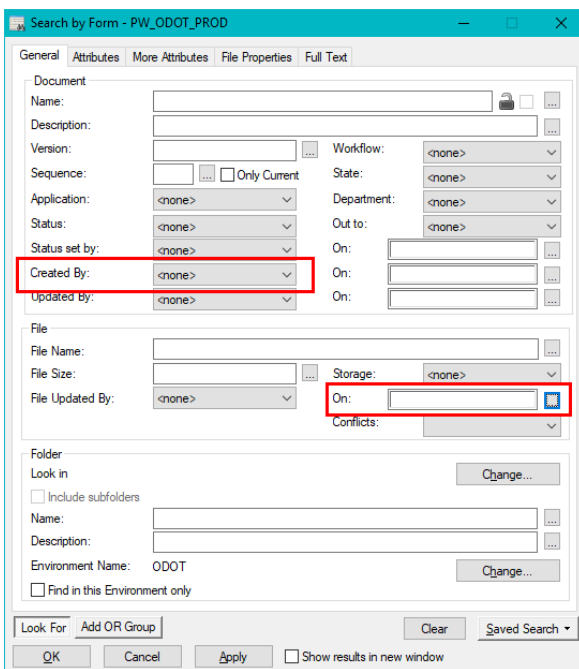
Saved Search>Save As – and give it a name. Check the box "Saved Search Name".
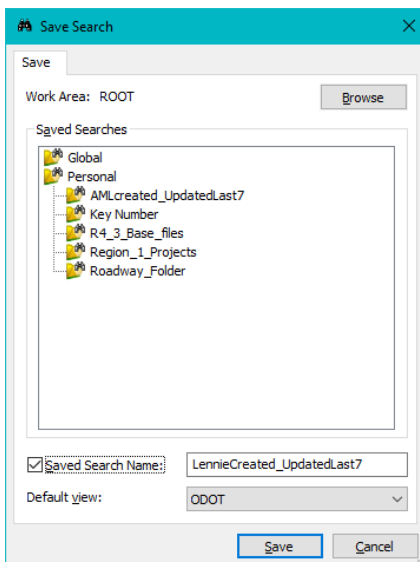
Now just click on the saved search to see the results.