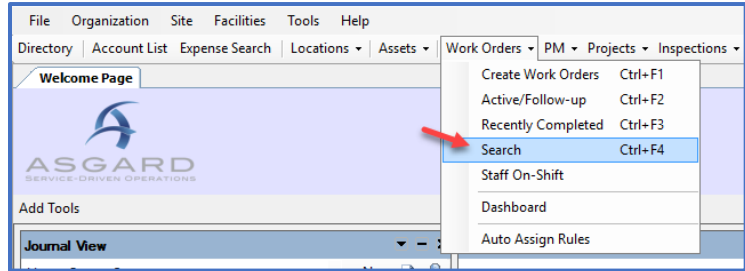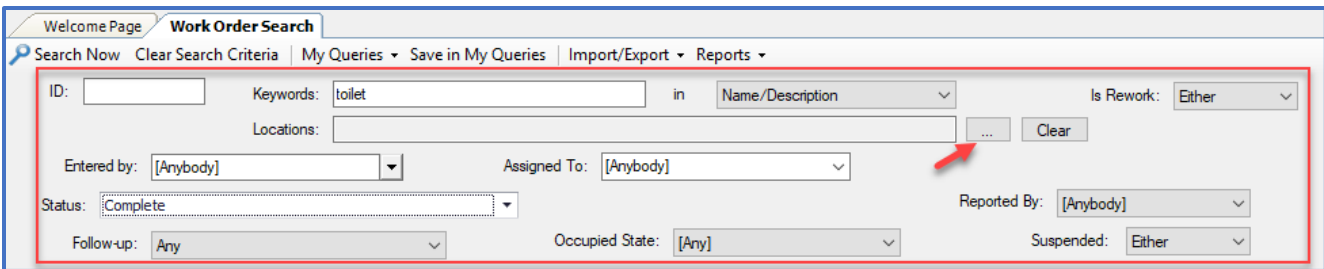## Creating and Saving a Search Query

Follow the steps below to create and save a work order search query. The steps below can be used to search for and save Standard Work Orders, PMs, and Inspections. For assistance with work order queries, please contact support@katanasoft.com*.*

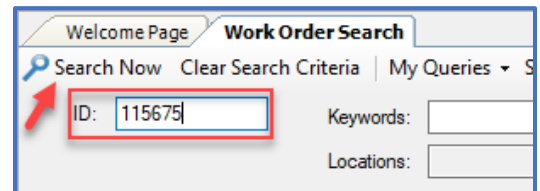**Step 1:** In the Work Orders drop-down, select **Search**.

Step 2: In the top half of the screen, use the following fields to select your search criteria:

- Keywords
- Locations – use the Ellipses button to select
- Is Rework
- Entered by
- Assigned To

- Status – defaults to Incomplete
- Reported By
- Follow-up
- Occupied State
- Suspended

Note: The ID field is used to search for a specific work order. If you know the ID and are searching for only one work order, enter the ID and click the **Search Now** button. All other fields can be left at the defaults.

Step 3: In the Advanced Search Criteria section, add additional criteria as needed

- Priority From
- Expected to Start From **or** Completed From date range
- Include Future Scheduled Items
- Is the work order task an "Extra Request"
- Types - the Department completing the work

Note: Leaving the dates unselected will return all matching work orders in Asgard (which can be a large data pull).

Step 4: Once you have entered all of your search criteria, click the **Search Now** button in the upper left.

A list of all work orders matching the criteria will populate at the bottom of the screen.

Step 5: If you are satisfied that the search is providing the data you need, click the **Save in My Queries** button.
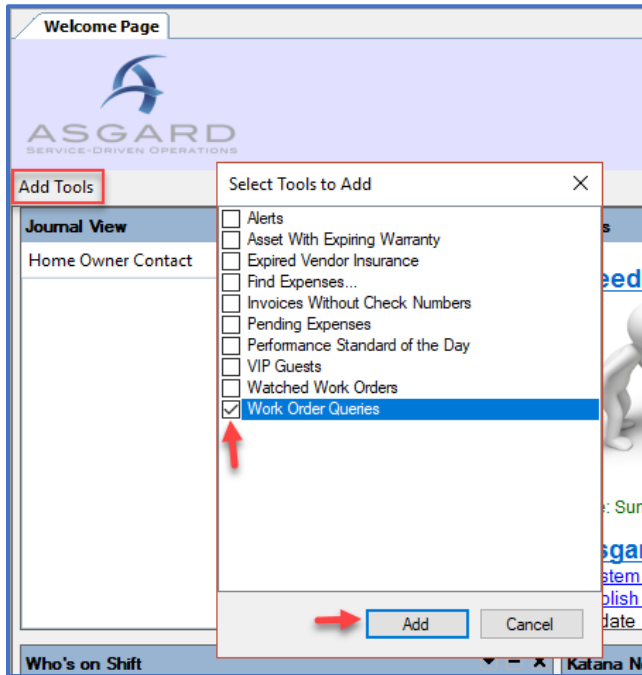

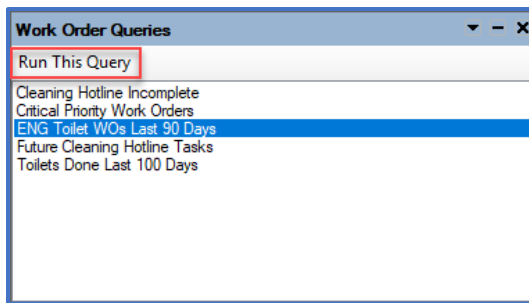When the Name Query box opens, enter a descriptive name and click **OK**.

Step 6: There are two ways to retrieve/view Saved Queries:

1. On the Welcome Page, click the **Add Tools** button, check the box for Work Order Queries, and click **Add**.

The Work Order Queries tool will be added to your Welcome Page. Highlight the Query and click Run This Query.

The system will open the Work Order Search Screen displaying the results of the query.

2. On the Work Order Search screen, open the My Queries drop-down and select the search you want to run. This is also where you manage your Queries