

How to Create, View, Modify and Remove Favorite Searches

Market: House, Senate

Description: These instructions teach users how to save IQ records as **Favorites** so they can access them more quickly.

Note: **Favorites** refer to a link to a set of records that users have saved so they can easily access them. The set of records shown in each of your **Favorites** may change over time as the search/filter criteria is dynamic and results are based on the most current executed search/filter.

Click the following link(s) to be brought directly to the subtopic:

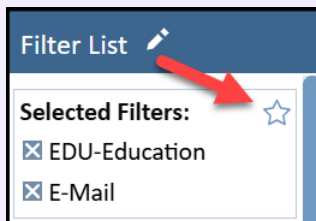
[Viewing a Favorite](#)

[Modifying a Favorite Name](#)

[Removing a Favorite](#)

Creating a Favorite

1. Within the IQ Tool, search for the set of records that you want to save using filters.
2. Under the Filter List in the left-hand column, navigate to the top and click the  icon (the **Favorites icon**).



3. The **Favorite View** window appears on the screen. In the **Title** field, enter a name for the list. In the **Description** field, enter a description. Click **Save**.

Favorite View [X]

Save to Menu's My Favorite Views Section

With Selected Filters

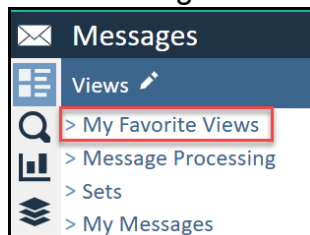
Title
All Open Unbatched Education Emails

Description
Example of a Saved Favorite

[Save and View] [Save] [Close]

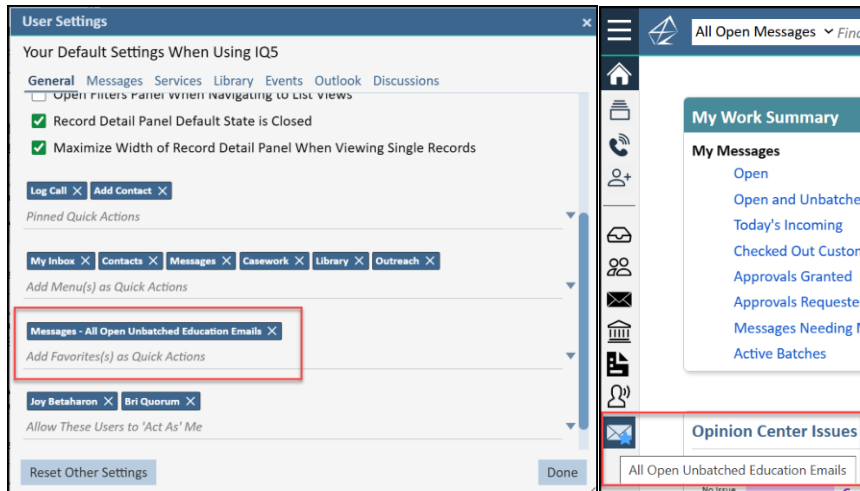
Viewing a Favorite

1. **Favorites** are saved in the application in which it was created. Navigate to the appropriate application and go to the **Views** list and make a selection in the My



Favorite Views.

2. **Favorites** can also be **pinned to the Action Icon Bar** by navigating to the **User Settings** and clicking into the dropdown named **Add Favorite(s) as Quick Actions**. This allows you to access your favorites with one click from the Action Icon Bar.



[Top of Page](#)

Modifying a Favorite Name

1. Navigate to the Filter list within the application. In the **Selected Filters** section, click the ★ icon.



2. The **Favorite View** window will open. Make the necessary edits and then click the **Save** button.

Favorite View ×

Save to Menu's My Favorite Views Section

With Selected Filters

Title
All Open Unbatched Education Emails - Modified

Description
Example of a Saved Favorite

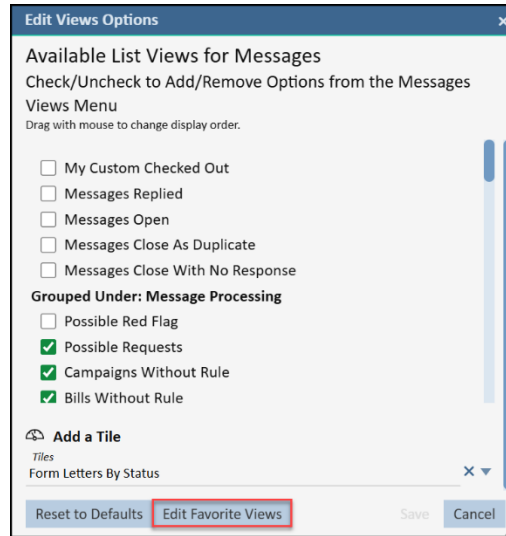
Make CopyCopy to UsersDelete Favorite

SaveClose

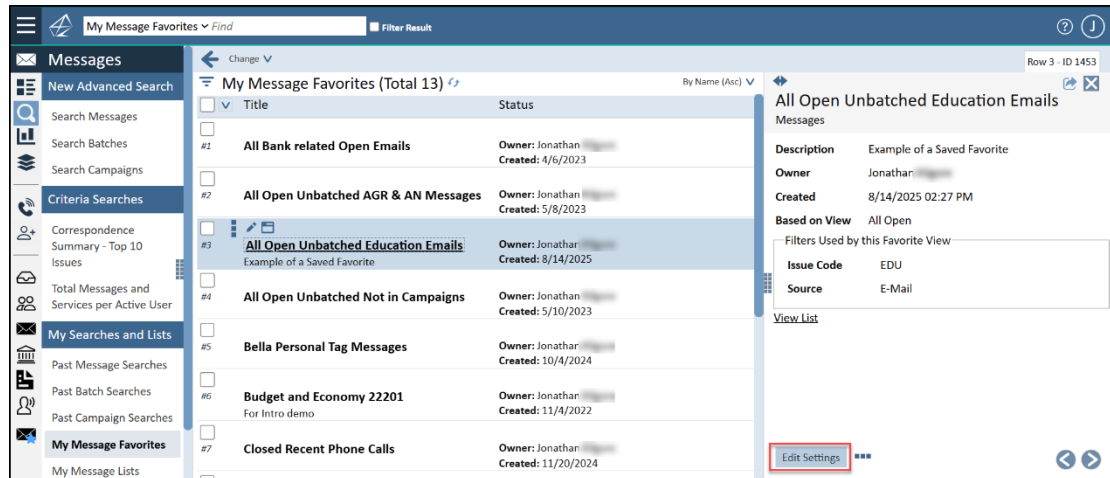
[Top of Page](#)

Removing a Favorite

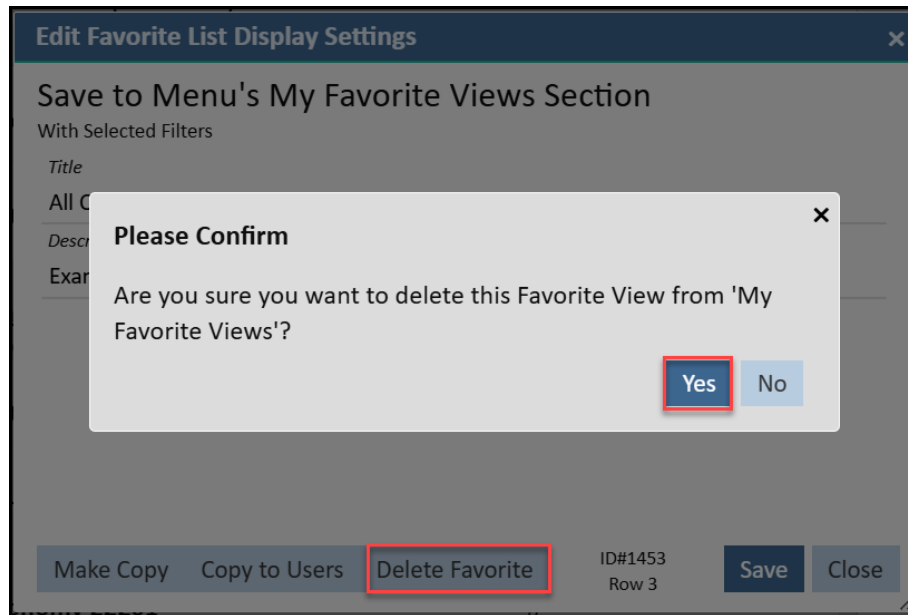
1. Click on the  icon next to **Views** in the Application where your favorite is located.
2. Your list of **Views** will open. Click **Edit Favorite Views**.



3. Select the Favorite you wish to remove and click on **Edit Settings**.



4. Click **Delete Favorite**. Click the **Yes** button to confirm changes.



[Top of Page](#)