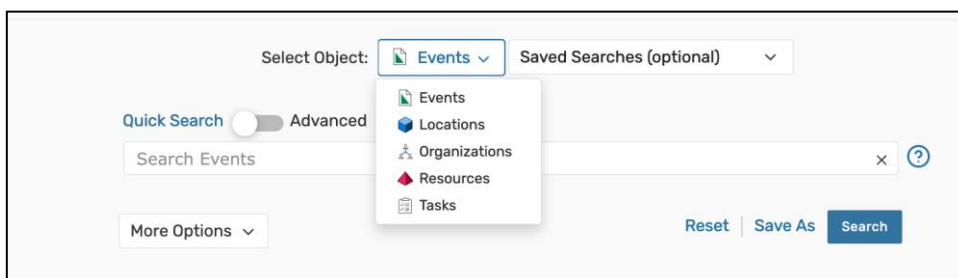


## Mod 9 Basic Searches for Events, Locations, Organizations, Resources

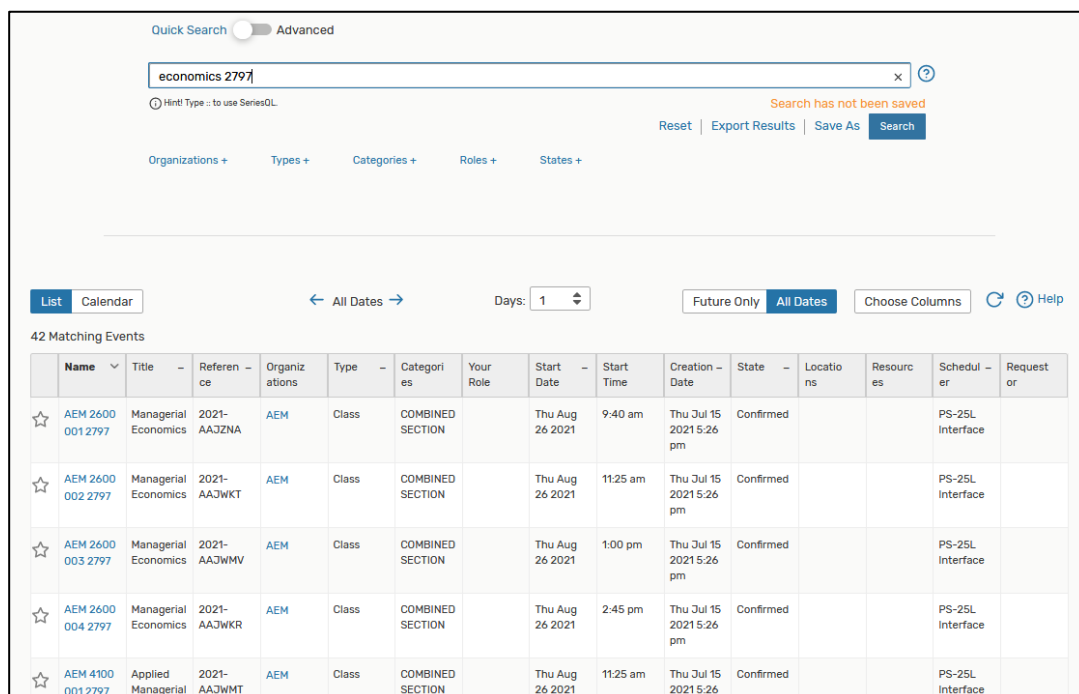
 [Go to Search](#)

Throughout this training, we have seen or created some basic searches. Searches are not only helpful to located events, locations, tasks, etc. but also are necessary when running many of the available reports in 25Live. Start by clicking Go to Search on any page.

*Feel free to open 25Live and duplicate the steps shown here.*



Use the dropdown list to select the type of search. The default is events. You can add words to the Quick Search keyword field to retrieve a list of events that have the words in either the name or title. Since I entered "economics 2797", the results return any event that has "Economics" and "2797" (case doesn't matter) in the name or title. However, "Economics" and "2797" need to be in one or the other.



	Name	Title	Referen - ce	Organiz - ations	Type	Categori - es	Your Role	Start Date	Start Time	Creation - Date	State	Locatio - ns	Resourc - es	Schedul - er	Request or
☆	AEM 2600 001 2797	Managerial Economics	2021-AAJZNA	AEM	Class	COMBINED SECTION		Thu Aug 26 2021	9:40 am	Thu Jul 15 2021 5:26 pm	Confirmed			PS-25L Interface	
☆	AEM 2600 002 2797	Managerial Economics	2021-AAJWKT	AEM	Class	COMBINED SECTION		Thu Aug 26 2021	11:25 am	Thu Jul 15 2021 5:26 pm	Confirmed			PS-25L Interface	
☆	AEM 2600 003 2797	Managerial Economics	2021-AAJWMV	AEM	Class	COMBINED SECTION		Thu Aug 26 2021	1:00 pm	Thu Jul 15 2021 5:26 pm	Confirmed			PS-25L Interface	
☆	AEM 2600 004 2797	Managerial Economics	2021-AAJWKR	AEM	Class	COMBINED SECTION		Thu Aug 26 2021	2:45 pm	Thu Jul 15 2021 5:26 pm	Confirmed			PS-25L Interface	
☆	AEM 4100 001 2797	Applied Managerial	2021-AAJWMT	AEM	Class	COMBINED SECTION		Thu Aug 26 2021	11:25 am	Thu Jul 15 2021 5:26	Confirmed			PS-25L Interface	

Predefined public or shared searches may be available. An example of a shared search is "FA21 Classes". You can see the count that met the Search Criteria at the top or bottom of the page. At the bottom you can set how many rows are returned per page (up to 100).

Quick Search ☐ Advanced

FA21 Classes

Reset | Export Results | Save | Save As | Search

Search Actions

List | Calendar

← All Dates → Days: 1

Future Only | All Dates | Choose Columns | Help

4632 Matching Events

Name	Title	Reference	Organizations	Type	Categories	Your Role	Start Date	Start Time	Creation Date	State	Location	Resources	Scheduler	Requestor
AAS 2100 101 CS 2797	South Asian Diaspora	2021-AAKFST	AAS	Class	COMBINED SECTION	Requestor	Thu Aug 26 2021	2:55 pm	Thu Jul 15 2021 5:26 pm	Confirmed			Arts and Sciences Scheduling Admin	Tom Boggess
AAS 5400	Labor	2021-	AAS	Class	COMBINED		Thu Aug	11:25 am	Thu Jul 15	Confirmed			PS-25L	

4632 Matching Events Page 1 of 186

First Previous 1 Next Last

Items per page 25

Likely you will want to use this shared search and limit it to a set of classes in a particular location and/or for a particular subject. To do so, add criteria. For example, to return the number of classes scheduled in Goldwin Smith Hall in **Fall 2020**, start with a class search for that term (**FA20 Classes**), then limit the results to those in Goldwin Smith Hall. Each time a criterion is added, you will want to verify the results.

First, move the slide towards Advanced. The existing criteria are displayed.

Quick Search ☒ Advanced

FA20 Classes

Cabinets

EDIT

X Cornell University Academic Classes

and

General

Event Name

ends with

2769

Show All

and

Event Types

Include Any

EDIT

X Class X Class-MAIN X Class-NYT

Add Criteria

Click **Add Criteria > Assigned Locations > Locations (Via Search)**; select your saved search and run the Search.

Add Criteria

Categories

Requirements

Custom Attribute

Occurrence Dates

Segment Definitions

Assigned Locations

Specific Locations

Locations (Via Search)

Preferred Locations

Missing Location Assignments

Assigned Resources

The number of class events returned is 54. How could you limit the search further to show only Art History classes?

Search for Events in a particular Location for Specified Period

To create a search listing events in a particular location for specified period, start by clicking the **Reset** button; be sure we are searching for Events and the slider is set to Advanced and start by adding a criteria **Assigned Locations > Specific Locations**.

Enter the room of interest, here Willard Straight 407 - the Memorial Room "wsh407" and select it as the Location.

To limit to the next 14 days, add a criteria for **Occurrence Dates** and enter 14 in the **Until** field.

The result will show all events in WSH142 over the next 14 days.

List

Calendar

← All Dates →

Days: 1

Future Only

All Dates

Choose Columns

Help

7 Matching Events

	Name	Title	Reference	Organizations	Type	Categories	Your Role	Start Date	Start Time	Creation Date	State	Locations	Resources	Schedule	Requestor
☆	6/12 RA Training	RA Training	2021-AA3SNB	Housing and Residential Life-SCL	Workshop / Seminar / Training			Thu Aug 12 2021	2:00 pm	Wed Jun 16 2021 1:36 pm	Confirmed	WSH407		Willard Straight Hall SCL Scheduling Admin	Lammi Adem
☆	Big Red Welcome Fest	Big Red Welcome Fest	2021-AA3RXQ	New Student Progs-SCL	Open House / Fair / Trade Show			Thu Aug 19 2021	9:00 am	Wed Jun 09 2021 3:31 pm	Tentative	HOPACTA, HOPACTB, HOPRALLY, HOPTABLE1, HOPTABLE2, HOPTABLE3, HOPTABLE4, HOPTABLE5, HOPTABLE6, HOPTABLE7, HOPTABLE8, WSH404, WSH407, WSHTABLEA, WSHTABLEB, WSHTABLEC, WSHTABLED, WSHTABLEE	EMPT-CUPO- Approver, EMPT-FAC- Approver, EMPT-RMI- Approver, EMPT-SCL- Approver, EMPT-TS- Approver, EMPT-UR- Approver	Willard Straight Hall SCL Scheduling Admin	Marisa LaFalce
☆	HOLD   2021 Opening/Orientation	HOLD   2021 Opening/Orientation	2020-AAHVTL	Conference and Event Svcs-SCL	Calendar Announcement			Thu Aug 19 2021	12:00 am	Thu Apr 30 2020 10:32 am	Confirmed	APP302ABC, APPTABLEA, APPXPAT,		North Campus SCL Scheduling Admin	Kit Tannenbaum

Save the search with a meaningful name. By default, the search is saved as a starred search and will appear in your dropdown list of event searches.

Select Object: Events WSH Events next 14 da... ☆ ▼

Quick Search ☐ Advanced

WSH Events next 14 days

Q wsh

**Your Starred Event Searches**

WSH Events next 14 days ☆

**All of Your Event Searches**

WSH Events next 14 days ☆

Results | Save Save As Search

## Sharing Searches

To share a search, select Share from the Search Actions dropdown and enter the name of the Contact with whom you'd like to share, and select the correct Contact (verify by email address)

Quick Search ☐ Advanced

GSH142 Next 14 Days

Search Actions ^

Share

Refresh Search Criteria

Delete

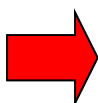
**Share Search**

Select 25Live contacts/groups to receive a copy of your saved search.

Choose Contacts

Choose Contacts aryn x ☆ Only Favorites

☒ Taylor-Admin, Aryn  
at624@cornell.edu



Note: In general, Shared Searches are *\*not\** automatically updated when the originator changes Criteria. Once you have a Saved Search, it is yours to maintain and edit.

## Activity 9A

1. Create and save a search for **events** not confirmed but with a location assigned in your area of interest
2. Create and save a list of locations in two buildings
3. Create and save a list of organizations that includes at least five organizations you might typically schedule

## Reports and Searches

25Live provides a large set of reports. Many reports use searches to return data for events, locations, resources, etc.

Advantages to using online searches rather than printing reports include the currency of the data (a report is out of date the moment it is run) and the resulting list from the search can serve as a way to open the object (event, location, resource, org, task). Advantages of a report include the ability to carry a list for, say, set up or event monitoring; posting the events happening in a location; and having an spreadsheet<sup>15</sup> to work from and share.

Most reports will require a saved search, which needs to be created prior to running the report. Time spent on understanding what will be returned by the Search will lead to a more predictable and satisfying report.

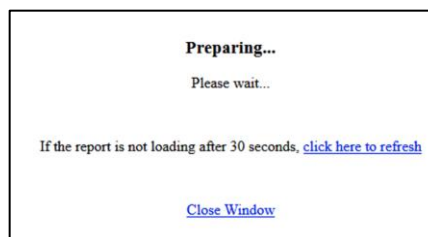
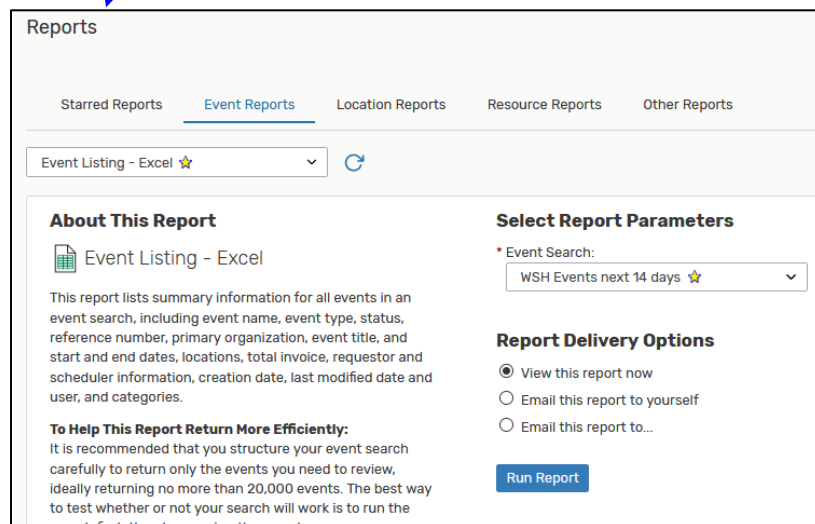
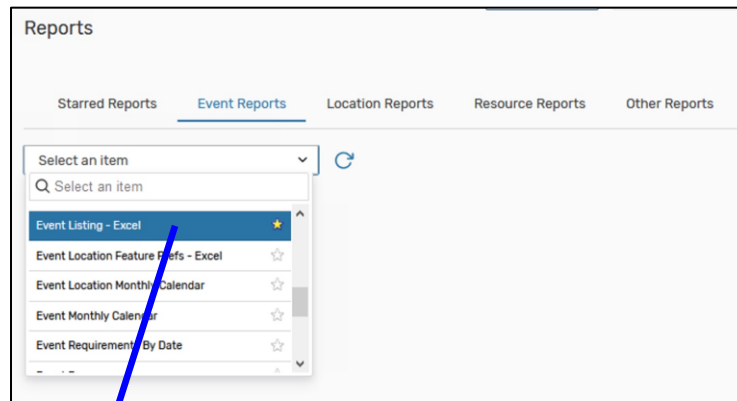


To run a report, select **More > Reports** from the top right of the 25Live window

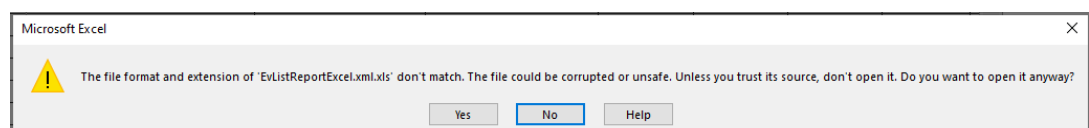
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<sup>15</sup> Not all reports can output spreadsheets and some of the spreadsheet output options may not match your expectations. Testing is key.

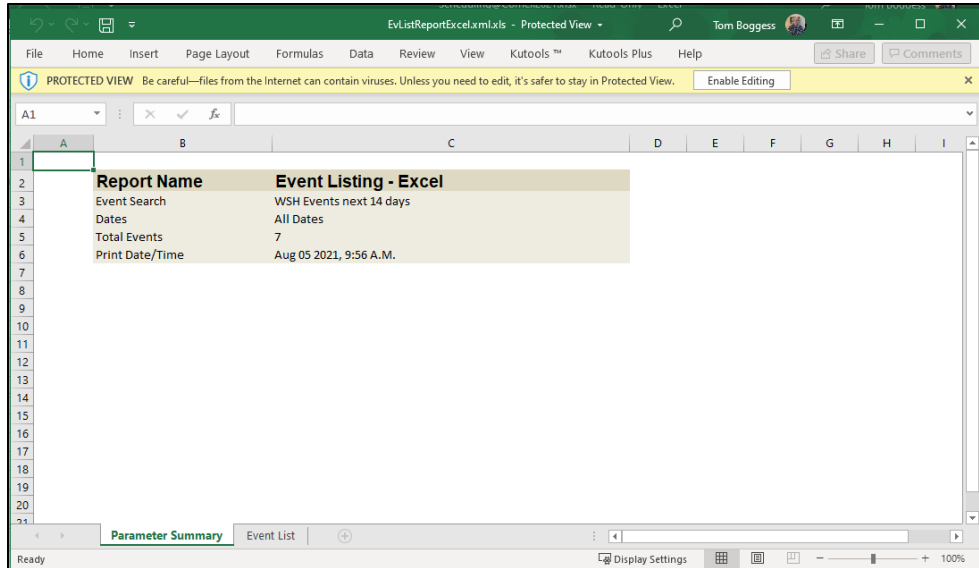
To create an event listing report, select **Event Reports** and select **Event Listing – Excel** from the list. Select an *existing search* and for report delivery, choose **View this report now** now.



Choose to open in Excel. When the file opens, the following message likely will display. Choose "Yes"



There are two sheets, one listing information with the report and search information, and a second with the data.

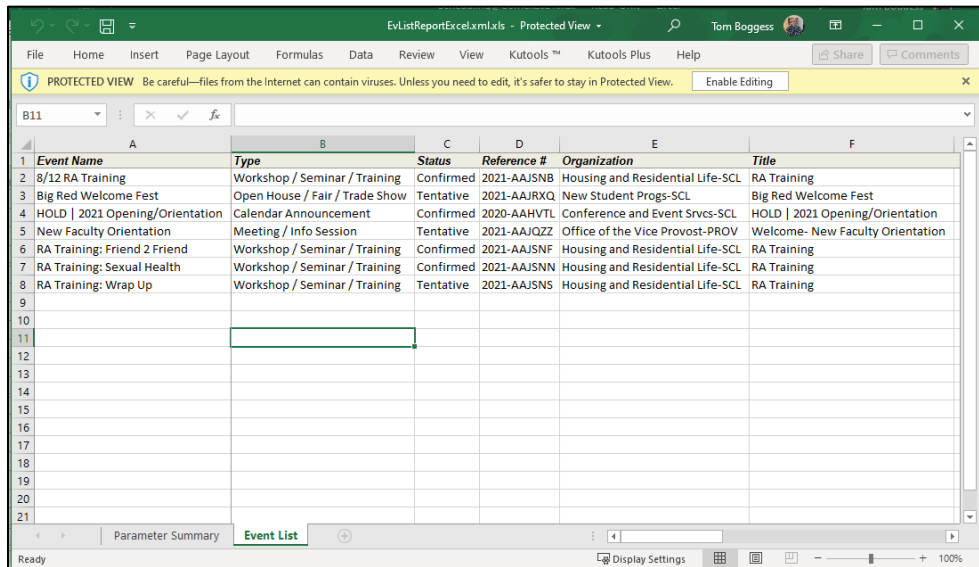


Excel Protected View: EvListReportExcel.xml.xls - Protected View

Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing]

Report Name	Event Listing - Excel
Event Search	WSH Events next 14 days
Dates	All Dates
Total Events	7
Print Date/Time	Aug 05 2021, 9:56 A.M.

Parameter Summary | Event List



Excel Protected View: EvListReportExcel.xml.xls - Protected View

Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing]

Event Name	Type	Status	Reference #	Organization	Title
8/12 RA Training	Workshop / Seminar / Training	Confirmed	2021-AAJSNB	Housing and Residential Life-SCL	RA Training
Big Red Welcome Fest	Open House / Fair / Trade Show	Tentative	2021-AAJRXQ	New Student Progs-SCL	Big Red Welcome Fest
HOLD   2021 Opening/Orientation	Calendar Announcement	Confirmed	2020-AAHVTI	Conference and Event Svcs-SCL	HOLD   2021 Opening/Orientation
New Faculty Orientation	Meeting / Info Session	Tentative	2021-AAJQZZ	Office of the Vice Provost-PROV	Welcome- New Faculty Orientation
RA Training: Friend 2 Friend	Workshop / Seminar / Training	Confirmed	2021-AAJSNF	Housing and Residential Life-SCL	RA Training
RA Training: Sexual Health	Workshop / Seminar / Training	Confirmed	2021-AAJSNN	Housing and Residential Life-SCL	RA Training
RA Training: Wrap Up	Workshop / Seminar / Training	Tentative	2021-AAJSNS	Housing and Residential Life-SCL	RA Training

Parameter Summary | Event List

## Activity 9B

1. Take a look at the reports that are available on the reports page. Pull one up. How might you tell how the report will look when run?
2. Compare a couple of reports.
  - a. If you haven't already, create a search that returns events in Willard Straight Hall 407 for the next 14 days (should return 7 events)
  - b. Run an Event Listing (Excel) report using the search you created in a.
  - c. Run an Academic Term Summary report using the same search.
  - d. How many rows are shown in the Event Listing vs the Academic Term Summary reports? Why is there a difference?
3. Run a 7-Day report showing events for a space in your area (or location of interest)
4. Create a "Dummy" Event with all ERP Questions marked as "No". How might this be helpful?
5. Log into 25Live PROD so your contact will be ready at go-live:

`https://25live.collegenet.com/pro/cornell` ← no 't' at the end