

# How-To in 25Live Creating Searches

Creating and saving searches is very helpful if you have a location or set of locations that you frequently view or use when scheduling events. You can save these searches for later use. This how-to includes <u>Event</u> searches (page 1), <u>Location</u> searches (page 6), and <u>Tips for Searches</u> (page 12).

## **Event Searches:**

Click on the "More" button on the top right hand corner of the screen to bring down the menu options.

Click "Search" to search for locations, organizations, events, resources, etc.

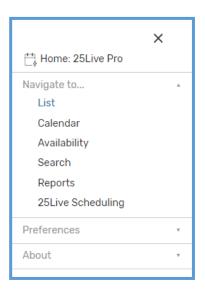
In the center of your screen, you will see another drop down menu to select the object you wish to search

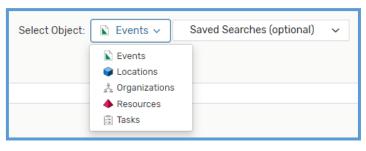
Click on "Events"

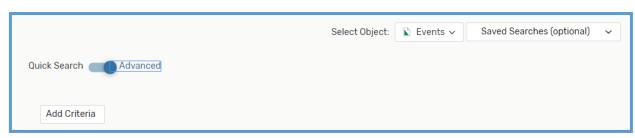
Click on "Advanced"

Click on "Add Criteria"



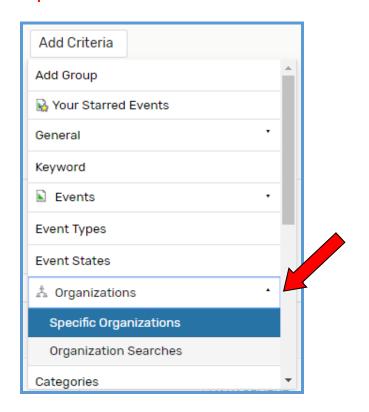






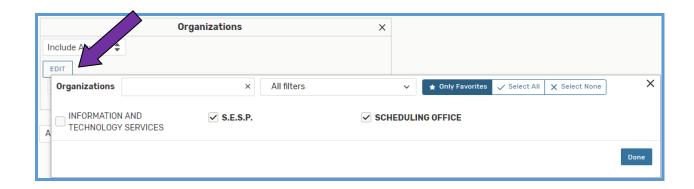
For this example, we are going to create an event search for any past confirmed events that the Special Events and Summer Programs Office and/or the Scheduling Office requested in the KAV and Leffler Chapel between May 1, 2018 and August 31, 2019.

## Step 1:

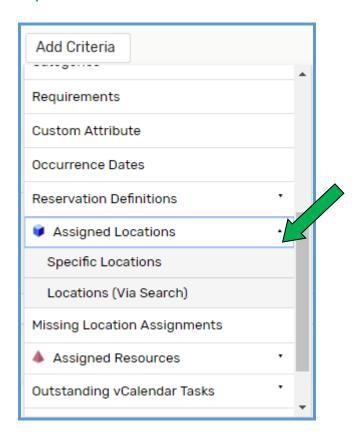


Step 1: Choose "Organizations" and then "Specific Organizations" in order to add one or multiple organizations to your search. **Step 2:** Choose the "EDIT" button to select the desired organization(s). You can select the Only Favorites option to narrow your search or begin typing in keywords. Once you have the organization you need, simply click to check the organization. Once you have chosen the correct locations, you can click "done" TIP: You can type and select as many as you need – they all will appear after you select done.

### Step 2:



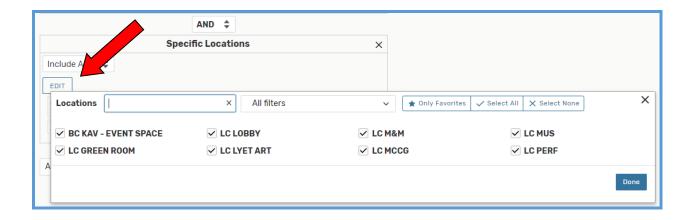
## Step 3:



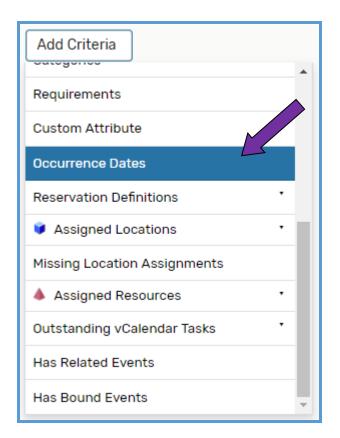
**Step 3:** Choose "Add Criteria" and "Assigned Locations" and "Specific Locations" to add one or more locations to the search

Step 4: Choose the "EDIT" button to select the desired location(s). You can select the Only Favorites option to narrow your search or begin typing in keywords. Once you have the location you need, simply click to check the location. Once you have chosen the correct locations, you can click "done"

## Step 4:



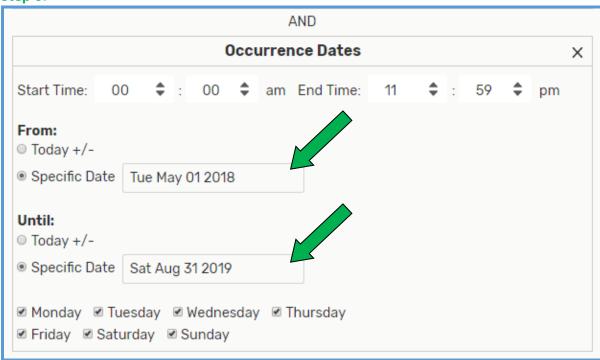
## Step 5:



**Step 5:** Choose "Add Criteria" and "Occurrence Dates" to choose the date range you are looking in

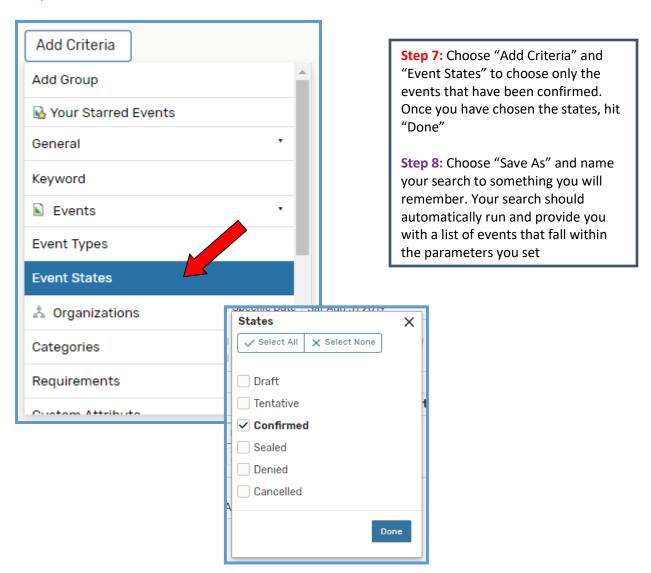
Step 6: Choose the correct start date and end date you wish to search and hit "done". You can also narrow your search by only selecting weekends (Sunday & Saturday) or weekday events (Monday-Friday), or adjust the time of the day you wish to search.

## Step 6:

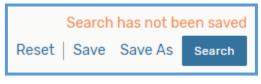


Facilities Management - Scheduling 8/1/2019

## Step 7:



Step 8:





# **Location Searches**

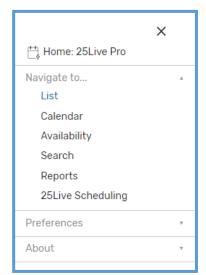
Click on the "More" button on the top right hand corner of the screen to bring down the menu options.

Click "Search" to search for locations, organizations, events, resources, etc.

In the center of your screen, you will see another drop down menu to select the object you wish to search

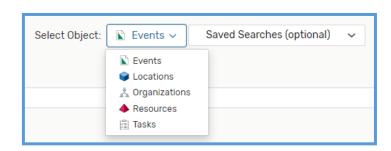
Click on "Locations"





Click on "Advanced"

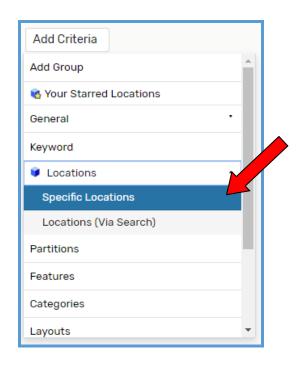
Click on "Add Criteria"





For this first example, we are going to create a simple location search for any popular location events (i.e., the KAV, Leffler Chapel, Gibble Auditorium, Hoover 110, and the Susquehanna/Swatara Rooms).

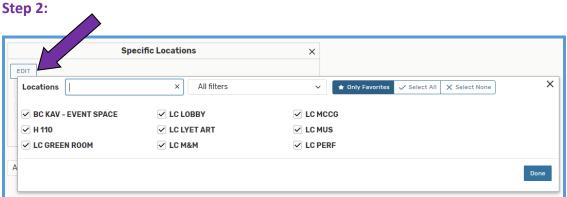
### Step 1:



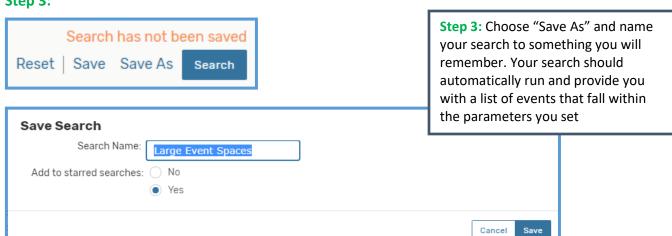
**Step 1:** Choose "Locations" and then "Specific Locations" in order to add one or multiple locations to your search.

**Step 2:** Choose the "EDIT" button to select the desired location(s). You can select the Only Favorites option to narrow your search or begin typing in keywords. Once you have the location you need, simply click to check the location. Once you have chosen the correct locations, you can click "done"

TIP: You can type and select as many as you need – they all will appear after you select done.

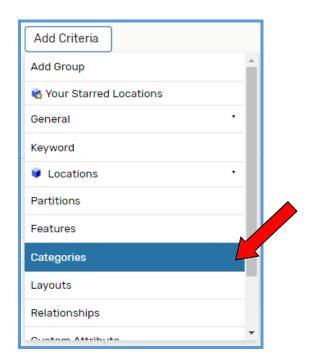


## Step 3:



For this next location search example, we are going to create a location search for any locations in Nicarry or Hoover Business Building that are video conference capable, and has a maximum capacity of 24 people (this can be ideal for smaller meetings or conference style rooms where you may need to setup a Zoom Interview).

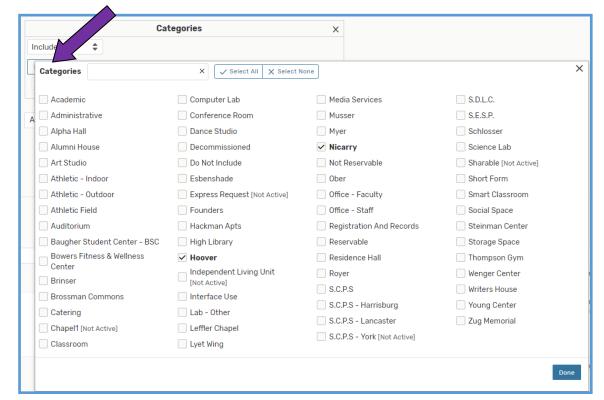
#### Step 1:



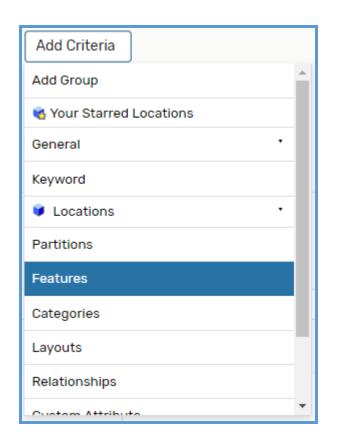
**Step 1:** Choose "Add Criteria" and "Categories" in order to add things such as whole buildings, academic rooms, computer labs, smart classrooms, etc. to your list

**Step 2:** Choose the "EDIT" button to select the desired category(s). Once you have selected all that you need, you can click "done"

Step 2:



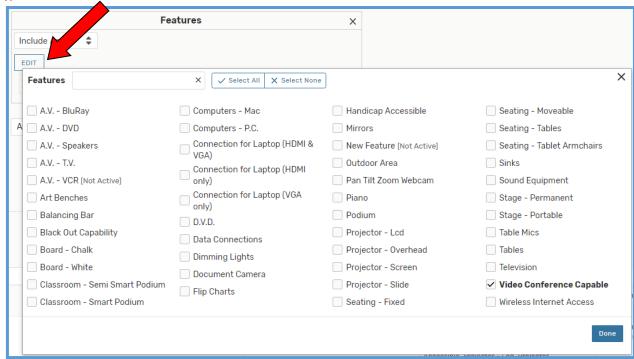
## Step 3:



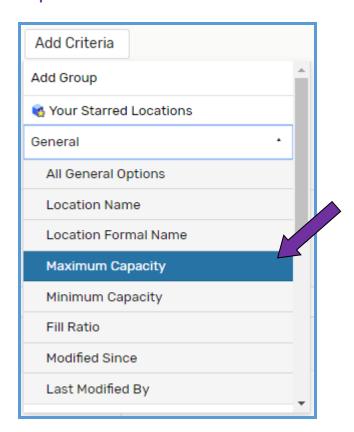
**Step 3:** Choose "Add Criteria" and "Features" in order to add things such as document cameras, computers, smart podium, etc. to your list

**Step 4:** Choose the "EDIT" button to select the desired feature(s). Once you have selected all that you need, you can click "done"

Step 4:



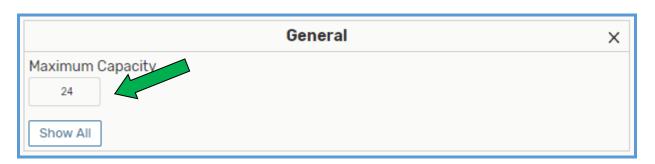
## Step 5:



**Step 5:** Choose "Add Criteria" and "General" and "Maximum Capacity" in order to adjust how large of a room you wish to search for

**Step 6:** Type in your maximum capacity and hit "Search" and don't forget to Save your search for later use.

## Step 6:



Search has not been saved
Reset | Save Save As Search

# **Tips for Searches:**

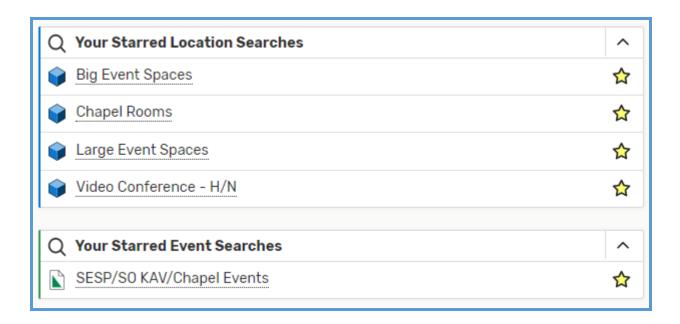
**TIP #1:** Any searches you create and Star will be added to your home screen dashboard tab to make

ease of access later on. To go back to your dashboard, click on the screen. You may need to refresh your page to see the searches if you have created any new ones.

If you don't see the "Starred Event Searches" or "Starred Location Searches" boxes on your dashboard, choose "Customize Dashboard" at the <u>bottom right</u> of your screen and simply drag any boxes you want to add down, or drag any boxes you do not wish to see up and select "Done" to save your changes.

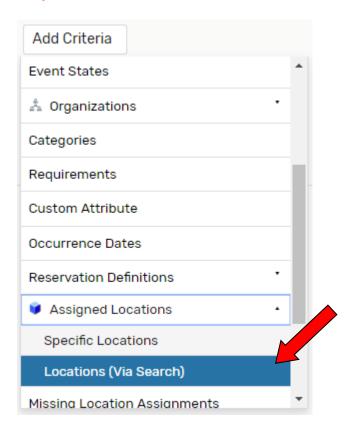






**TIP #2:** You can add any saved Location Searches into Event Searches that you create, saving you some time. Create your Event Search as you would in the steps above:

## Step 1:



Step 1: Choose "Add Criteria",
"Assigned Locations" and "Locations
(via Search)" in order to add whole
searches you have created or that
are public

Step 2: Choose the "EDIT" button to select the desired search. Select "Your Starred Location Searches" followed by the corresponding search to add it to the Selected Locations. Once you have selected all that you need, you can click "done" and search

Step 2:

