CREATE AN EVENT SEARCH

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REVISION HISTORY

Version	Date	Name	Description
1	10/1/15	Heather Edberg	Initial procedures (TCS)
2	7/19/18	Margaret Stewart	Updated procedures to reflect performance under LYNX interface (effective Winter 2018)
3	7/31/19	Margaret Stewart	Updated procedures to address elements specific to Summer Sessions
4	8/8/19	Erik Staiger	Updated procedures/screenshots to reflect upcoming switch to 25Live Pro
5.	11/19/19	Margaret Stewart	Minor edits and deleted Final Quiz section

INTRODUCTION AND PURPOSE

The purpose of this document is to outline how to create an event search. Three scenarios are presented in these procedures; however, an academic department can create (with search criteria available in 25Live) any kind of event search that's relevant to their department's needs. Saved searches can be executed multiple times. In addition, many reports on 25Live require an event search as a parameter before a report can be generated.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Academic course sections are created and updated in Banner. The transactional process between Banner and 25Live (LYNX) imports the course sections from Banner to 25Live. The initial course data import occurs after Academic Scheduling's "Call" deadline for the upcoming term's schedule of classes. Once course sections are in 25Live, LYNX will carry updates made in Banner to 25Live, as well as room scheduling and unscheduling from 25Live to Banner, within 1 – 2 minutes after the course section or room assignment update has been saved.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Academic Departments
2. Office of the Registrar – Academic Scheduling

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open 25Live Test https://25live.collegenet.com/pro/ucrt#!/home/dash) to follow along.

PAGES

No Banner pages are addressed in these procedures.

PROCEDURES

EVENT SEARCH - ACADEMIC COURSE SECTIONS

This search allows an academic department to pull up only the course sections they administer. The search can be modified as the search criteria changes (e.g., the term).

STEPS

1. In this example, an event search will be created to pull up **Fall 2018 lectures** being offered in the **Cell Biology and Neuroscience Department**.
2. Click **Go to Search** button.
3. Locate "Select Object" dropdown menu, and select: **Events**.
   a. Toggle button for **Advanced** search.
4. Click: **Add Criteria** button.
5. In the pop-up menu, select **Cabinets**.
6. See following:

7. Click on the **Edit** button.
   a. A **pop-up menu** will provide the options that can be selected for this search criterion.
   b. Select **201840 (Fall)**, then click **Done**.
8. Click: **Add Criteria** button.
9. In the **pop-up menu**, select **Event Types**.
10. Leave the default **Include Any**.
11. Click on the **Edit** button.
12. In the **pop-up menu**, select **LEC (lecture)**, then click **Done**.
13. Click: **Add Criteria** button.
14. In the **pop-up menu**, select **Organizations**, then **Specific Organizations**.
    a. A **department** or **course subject** is called an **organization** in **25Live**.
15. Leave the default **Include Any**.
16. Click on the **Edit** button.

17. Use the **Search** function in the **pop-up window** to pull up **CBNS** (Cell Biology and Neuroscience).
    a. Select **CBNS**, then click **Done**.
18. 18.　　　See following:

The first occurrence of "and" can be changed to "or." However, it will change any subsequent "ands" to "ors."

19. When all desired criteria have been selected, click **Save As**.
20. In the **pop-up box**, enter the name given to the search and click **Save** in the **pop-up box**.
21. See following:

22. Click **Search** button to ensure there is output.
23. See following:

	Name ⌄	Title	Reference	Organizations	Type	Your Role	Start Date	Start Time	Creation Date	State	Locations
☆	CBNS 101 001 23296	FUNDAMENTALS OF CELL BIOLOGY	2018-AAWKDA	CBNS	LEC (Lecture)		Fri Sep 28 2018	2:10 pm	Thu Mar 22 2018 10:56 am	Tentative	BRNHL B118
☆	CBNS 106 001 11705	INTRODUCTION TO NEUROSCIENCE	2018-AAWDFJ	CBNS	LEC (Lecture)		Thu Sep 27 2018	8:10 am	Thu Mar 22 2018 10:54 am	Tentative	LFSC 1500
☆	CBNS 120L 001 XL 11716	NEUROSCIENCE LABORATORY	2018-AAWGWM	CBNS	LEC (Lecture)		Wed Oct 03 2018	8:10 am	Thu Mar 22 2018 10:55 am	Tentative	PSYCH 2209
☆	CBNS 120L 002 XL 11717	NEUROSCIENCE LABORATORY	2018-AAWGWN	CBNS	LEC (Lecture)		Wed Oct 03 2018	1:10 pm	Thu Mar 22 2018 10:55 am	Tentative	PSYCH 2209

EVENT SEARCH – FINAL EXAMS

This search can be set up to pull scheduled final exams for all academic departments or specific academic departments. This event search must be created prior to running a 25Live report of final exams scheduled.

STEPS

1. In this example, an event search will be created to pull up first all **Spring 2019 scheduled final exams**; then the search will be modified to pull up only **Chemistry final exams**.
2. Finally, one more event search will be created to pull up **Summer 2019 final exams**.
3. Click **Go to Search** from 25Live Pro main page, then toggle the **Advanced** setting.
4. Click: **Add Criteria** button.
5. In the **pop-up menu**, select **Event Types**.
6. Leave the default **Include Any**.
7. Click on the **Edit** button.
8. In the **pop-up menu**, select **Final Exam**, then click **Done**.
9. Click: **Add Criteria** button.
10. In the **pop-up menu**, select **Occurrence Dates**.
11. Leave the **Start Time** and **End Time** defaults (00:00am and 11:59pm).
12. Under **From**, select **Specific Date** and, by clicking the **calendar icon**, select the **first day** of final exams for the term (in this example, for **Spring 2019** the first day of finals was **Saturday, June 8**).
13. Under **Until**, select **Specific Date** and, by clicking the **calendar icon**, select the **last day** of final exams for the term (in this example, for **Spring 2019** the last day of finals was **Friday, June 14**).
14. Uncheck **Sunday**.
15. When all desired criteria have been selected, click **Save As**.
16. In the **pop-up box**, enter the name given to the search and click **Save** in the pop-up box.
17. See following:

Spring 2018 Exams Test

Event Types	✕

Include Any ⬍

EDIT

✕ Final Exam

AND ⬍

Occurrence Dates	✕

Start Time: 00 : 00 am

End Time: 11 : 59 pm

From:
○ Today +/-
◉ Specific Date Sat Jun 08 2019

Until:
○ Today +/-
◉ Specific Date Fri Jun 14 2019

☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday
☑ Friday ☑ Saturday ☐ Sunday

18. Click **Search** button to ensure there is output.
19. See following:

Search Actions ⌄   Reset | Save   Save As

Search

List Calendar   ← All Dates →   Future Only All Dates   Choose Columns ↻ ⍰

	Name ⌄	Title	Reference	Organizations	Type	Your Role	Start Date	Start Time	Creation Date	State	Locations
☆	EXAM: BIEN 175C 001 50837		2019-ABAGSA	BIEN	Final Exam		Wed Jun 12 2019	7:00 pm	Thu May 16 2019 12:07 pm	Confirmed	BRNHL A125
☆	EXAM: AHS 017C 001 50008	EXAM: WESTERN ART: BAROQUE TO MODERN	2019-ABADJD	AHS	Final Exam		Wed Jun 12 2019	8:00 am	Fri May 10 2019 4:23 pm	Tentative	WAT 1000
☆	EXAM: ANTH 001 001 50107	EXAM: CULTURAL ANTHROPOLOGY	2019-ABADJF	ANTH	Final Exam		Mon Jun 10 2019	7:00 pm	Fri May 10 2019 4:23 pm	Tentative	UNLH 1000

First three of 726 final exams in this search output.

20. Next, modify this event search to pull only **Spring 2019 Chemistry final exams**.
21. If not already in the **Spring Final Exams** search:
    a. Navigate to the **Go to Search** button.
    b. Under **Select Object:**, click on **Saved Searches (optional)**.
    c. From the list on the right, click on desired event search (in this example, **Spring Final Exams**).
    d. Click: **Advanced** button to toggle advanced search mode.
22. Click: **Add Criteria** button.
23. From the **pop-up menu**, select **Organizations**, then **Specific Organizations**.
24. Leave the default **Include Any**.
25. Click on the **Edit** button.
26. Use the **Search** function in the **pop-up window** to pull up **CHEM** (Chemistry).
    e. Select **CHEM**, then click **Done**.
27. Click the **Save** button **below the search criteria**; then click the **Save** button in the **Enter Search Name pop-up box**.
28. See following:

29. Click **Search** button to ensure there is output.
30. See following:

	Name ⌄	Title	Reference	Organizations	Type	Your Role	Start Date	Start Time	Creation Date	State	Locations
☆	EXAM: CHEM 001B 001 52045		2019-ABAHJJ	CHEM	Final Exam	Requestor, Scheduler	Tue Jun 11 2019	11:30 am	Tue May 21 2019 11:02 am	Confirmed	MSE 116
☆	EXAM: CHEM 001B 020 52054		2019-ABAHJK	CHEM	Final Exam	Requestor, Scheduler	Tue Jun 11 2019	11:30 am	Tue May 21 2019 11:03 am	Confirmed	INTN 1020
☆	EXAM: CHEM 001B 040 60620		2019-ABAHJL	CHEM	Final Exam	Requestor, Scheduler	Tue Jun 11 2019	11:30 am	Tue May 21 2019 11:05 am	Confirmed	MSE 104

31. To create an event search to pull up **Summer 2019 final exams**, navigate to the **Events** tab.
32. Follow steps **4-13** above from section "**Event Search – Final Exams**".
33. Under **From**, select **Specific Date** and, by clicking the **displayed date**, select the **first day** of final exams for the term (in this example, for **Summer 2019** the first day of finals was **Friday, July 26**).
34. Under **Until**, select **Specific Date** and, by clicking the **displayed date**, select the **last day** of final exams for the term (in this example, for **Summer 2019** the last day of finals was **Saturday, September 14**).
35. Uncheck all days except **Friday** and **Saturday**.
36. See following:

Event Types ✕

Include Any ⬍

[EDIT]

✕ Final Exam

AND ⬍

Occurrence Dates ✕

Start Time: 00 ⬍ : 00 ⬍ am

End Time: 11 ⬍ : 59 ⬍ pm

From:
○ Today +/-
◉ Specific Date Fri Jul 26 2019

Until:
○ Today +/-
◉ Specific Date Sat Sep 14 2019

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
☑ Friday ☑ Saturday ☐ Sunday

[Add Criteria]

> These dates can be modified to pull finals from a specific part of term (POT). For example Session A's final exams occur from July 26-27, 2019

37. When all desired criteria have been selected, click **Save**.
38. In the **pop-up box**, enter the name given to the search and click **Save** in the pop-up box.
39. **Click Search** button to ensure there is output.
40. See following:

Sample of output:

	Name	Title ⌄	Reference	Organizations	Type	Your Role	Start Date	Start Time	Creation Date	State	Locations
☆	EXAM: ENGL 008 E16 73370	E	2019-AAZXAQ	ENGL	Final Exam		Fri Sep 13 2019	1:00 pm	Wed Feb 27 2019 4:31 pm	Confirmed	OLMH 1126
☆	EXAM: ENGL 008 E18 73372	E	2019-AAZXAR	ENGL	Final Exam		Fri Sep 13 2019	1:00 pm	Wed Feb 27 2019 4:32 pm	Confirmed	OLMH 1116
☆	EXAM: ENGL 008 E20 73374	E	2019-ABAAND	ENGL	Final Exam		Fri Sep 13 2019	1:00 pm	Fri Mar 15 2019 3:39 pm	Confirmed	INTS 2134

> Summer Sessions final exams will each include its POT code (unless created by the LYNX Exam Scheduler)

EVENT SEARCH – ONE-TIME (SPOT-SCHEDULED) EVENTS

This search can be set up to pull one-time events relevant to a given academic department or other campus department.

STEPS

1. In this example, an **event search** will be created to pull up **2018 spot-scheduled review sessions** for the **Chemistry** department.
2. Click the **Go to Search** button.
3. Click the **Advanced** toggle button for an advanced search.
4. Click: **Add Criteria** button.
5. In the **pop-up menu**, select **Cabinets**.
6. Leave the default **Include Any**.
7. Click the **Edit** button.
8. In the **Cabinets pop-up menu**, select **2018 Spot Scheduling**, then click **Done**.
9. Click: **Add Criteria** button.
10. In the **pop-up menu**, select **Event Types**.
11. Leave the defult **Include Any**.
12. Click the **Edit** button.
13. In the **Event Types pop-up menu**, select **Review Session**, then click **Done**.
14. Click: **Add Criteria** button.
15. In the **pop-up men**u, select **Organizations**, then **Specific Organizations**.
16. Leave the default **Include Any**.
17. Click the **Edit** button.
18. In the **Specific Organizations** box, use the **Search** function to find **CHEM** (Chemisty), then click **CHEM** in the **Select From…** column, then click **Done**.
19. See following:

20. When all desired criteria have been selected, click **Save As**.
21. In the **pop-up box**, enter the name given to the search and click **Save** in the pop-up box.
22. Click **Search** button to ensure there is output.
23. See following:

	Name	Title ⌄	Reference	Organizations	Type	Your Role	Start Date	Start Time	Creation Date	State	Locations
☆	CHE 008C-1 Review Session		2018-AAWPVT	CHEM	Review Session		Wed Apr 25 2018	4:10 pm	Mon Apr 16 2018 8:47 am	Confirmed	MSE 103
☆	CHEM 008C-1		2018-AAWTNQ	CHEM	Review Session		Tue May 22 2018	3:40 pm	Tue May 15 2018 8:13 am	Confirmed	LFSC 1500
☆	CHEM 008C-1		2018-AAWTNP	CHEM	Review Session		Mon May 21 2018	4:10 pm	Tue May 15 2018 8:10 am	Confirmed	UNLH 1000
☆	CHEM		2018-	CHEM	Review Session		Thu Apr 26 2018	9:40 am	Mon Apr 16 2018 1:43 pm	Confirmed	HMNSS 1503
	(April 26)										

This event came up because it fulfilled all the search criteria (incorrect organization entered in Event Wizard).