

Searching for Tasks



Security Note:

This functionality requires permissions configured in [Series25 Group Administration](#). You must have the ability to view task lists (Basic: 10.0 *View Tasks List*) associated with your 25Live user account. If you can't access something you think you should be able to, contact your 25Live Administrator.

The Tasks page Advanced Search area allows you to create and manage your own task searches. You must have special security permissions to use this area.

Select Object: Tasks ▼ Saved Searches (optional) ▼

Quick Search Advanced

At least one task state and one task type are required, but you may choose any combination of task types or states, or all of them. By default, task searches return only tasks due today.

Task States ^

☒ Outstanding
☐ Completed
☐ Denied
☐ Cancelled

☐ Flagged Tasks Only

Task Types ^

☒ To Do Tasks
☒ vCalendar To Do Tasks
☒ Authorization Tasks
☒ Notification FYIs
☒ Assignment Tasks

Dates ^

From

☒ Today +/- 0

☐ Specific Date

Until

☒ Day(s) Following 1

☐ Specific Date

Assigned To ^

Select Contacts

Assigned From ^

Select Contacts

Reset

Save as

Search

Image: Advanced task search criteria.

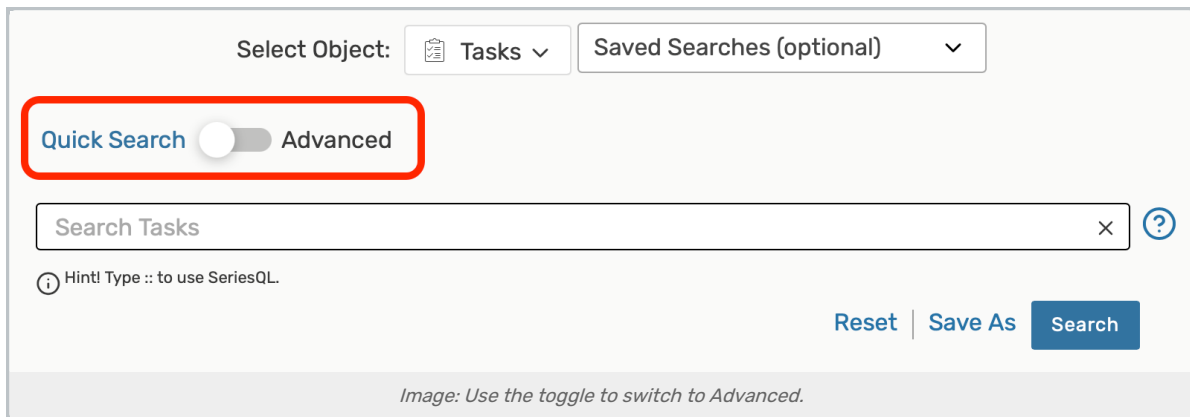


Tip

The Tasks page gives you access to your own saved task searches and those provided by the system. You can complete outstanding tasks directly from search results. See [Completing Tasks](#).

To Create an Advanced Task Search

1. Expand Advanced Search



Select Object: Tasks Saved Searches (optional)

Quick Search ☐ **Advanced**

Search Tasks × ?

? Hint! Type :: to use SeriesQL.

[Reset](#) | [Save As](#) [Search](#)

Image: Use the toggle to switch to Advanced.

From the Tasks view, expand the **Advanced** search area by toggling the search switch.

If you don't see the **Quick Search - Advanced** toggle, use the **Reset** link below the search box.

2. Check Task States and Task Types



Task States ^

☒ Outstanding

☐ Completed

☐ Denied

☐ Cancelled

☐ Flagged Tasks Only

Task Types ^

☒ To Do Tasks

☒ vCalendar To Do Tasks

☒ Authorization Tasks

☒ Notification FYIs

☒ Assignment Tasks

Image: Select at least one task state and type to complete an advanced search.

You must check at least one task state and one task type. Only tasks satisfying all criteria are included in the search results. For information on task states and types, see [Viewing Tasks](#).

3. Set Date Criteria

If you want your search results to include more than just today's tasks (the default), enter the number of days before or after today's date (using a positive or negative integer) you would like the search to span.

Or, enter specific dates to search a date range. Dates are based on when tasks are due.



Dates

From

☐ Today +/-

☒ Specific Date Mon Mar 18

Until

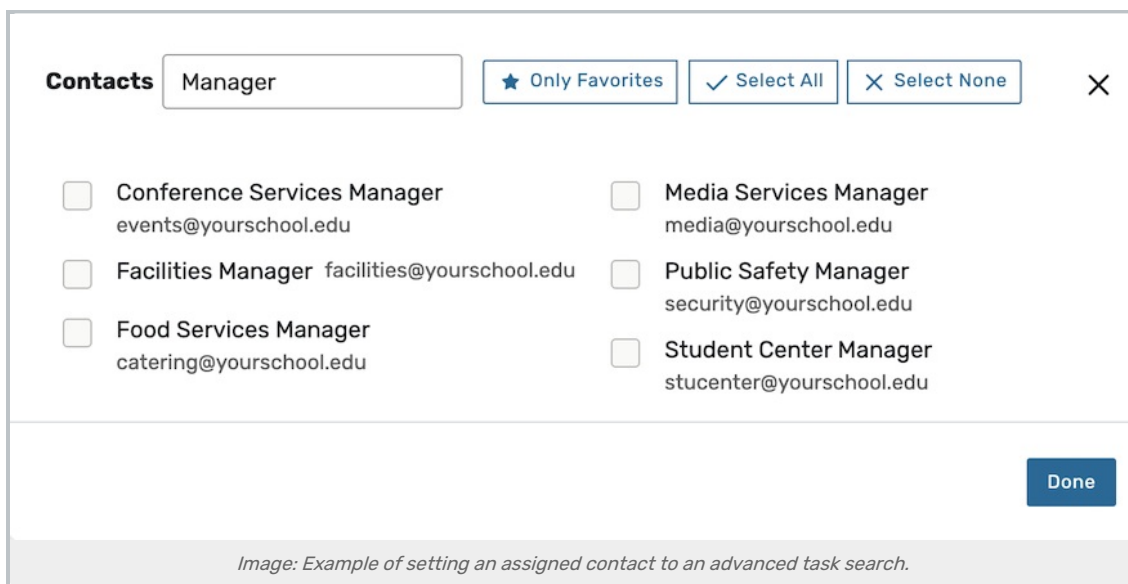
☐ Day(s) Following

☒ Specific Date Fri Jun 07

Image: Example of setting a specific date range for an advanced task search.

4. Set Assigned to Contact Criteria

If you want to search for tasks assigned to a particular contact, click **Select Contacts** below **Assigned To**, enter the full or partial contact name, check the contact in the displayed list, and click **Done**.



Contacts Manager

★ Only Favorites ✓ Select All ✕ Select None ✕

<input type="checkbox"/> Conference Services Manager events@yourschool.edu	<input type="checkbox"/> Media Services Manager media@yourschool.edu
<input type="checkbox"/> Facilities Manager facilities@yourschool.edu	<input type="checkbox"/> Public Safety Manager security@yourschool.edu
<input type="checkbox"/> Food Services Manager catering@yourschool.edu	<input type="checkbox"/> Student Center Manager stucenter@yourschool.edu

Done

Image: Example of setting an assigned contact to an advanced task search.

5. Set Assigned by Contact Criteria

If you want to search for tasks assigned by a particular contact, click **Select Contacts** below **Assigned From**, enter the full or partial contact name, check the contact in the displayed list, and click **Done**.

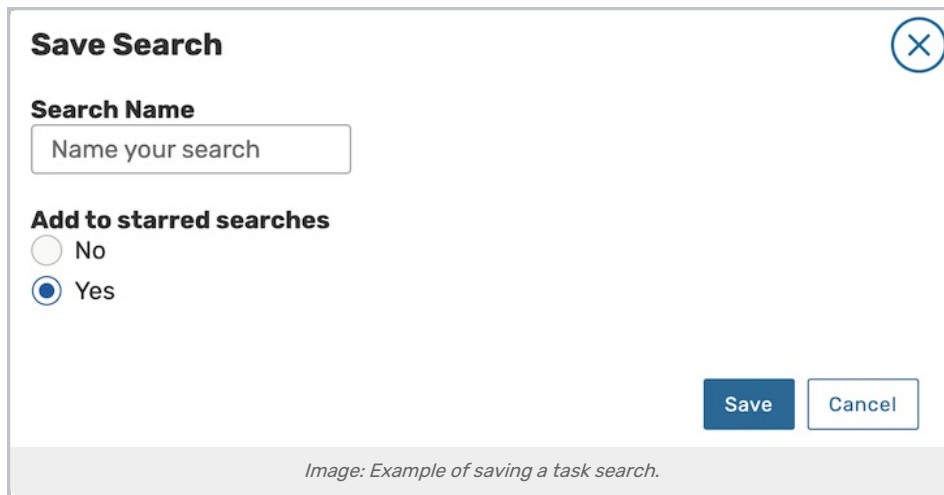
6. Perform the Search

Use the **Search** button to see if you're getting the desired results. Make changes if necessary and search again.

7. Save the Search

- Click the **Save As** button.
- Enter a name for the search.
- Indicate whether or not you want the search saved as a favorite/starred search.

- Click **Save**.



The screenshot shows a 'Save Search' dialog box with a close button (X) in the top right corner. It contains a text input field labeled 'Search Name' with the placeholder text 'Name your search'. Below this is a section titled 'Add to starred searches' with two radio button options: 'No' and 'Yes'. The 'Yes' option is selected. At the bottom right are 'Save' and 'Cancel' buttons. A caption at the bottom reads 'Image: Example of saving a task search.'

Save Search

Search Name

Name your search

Add to starred searches

☐ No

☒ Yes

Save **Cancel**

Image: Example of saving a task search.