Searching for Tasks

Security Note:

This functionality requires permissions configured in Series25 Group Administration. You must the ability to view task lists (Basic: 8.0 *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.

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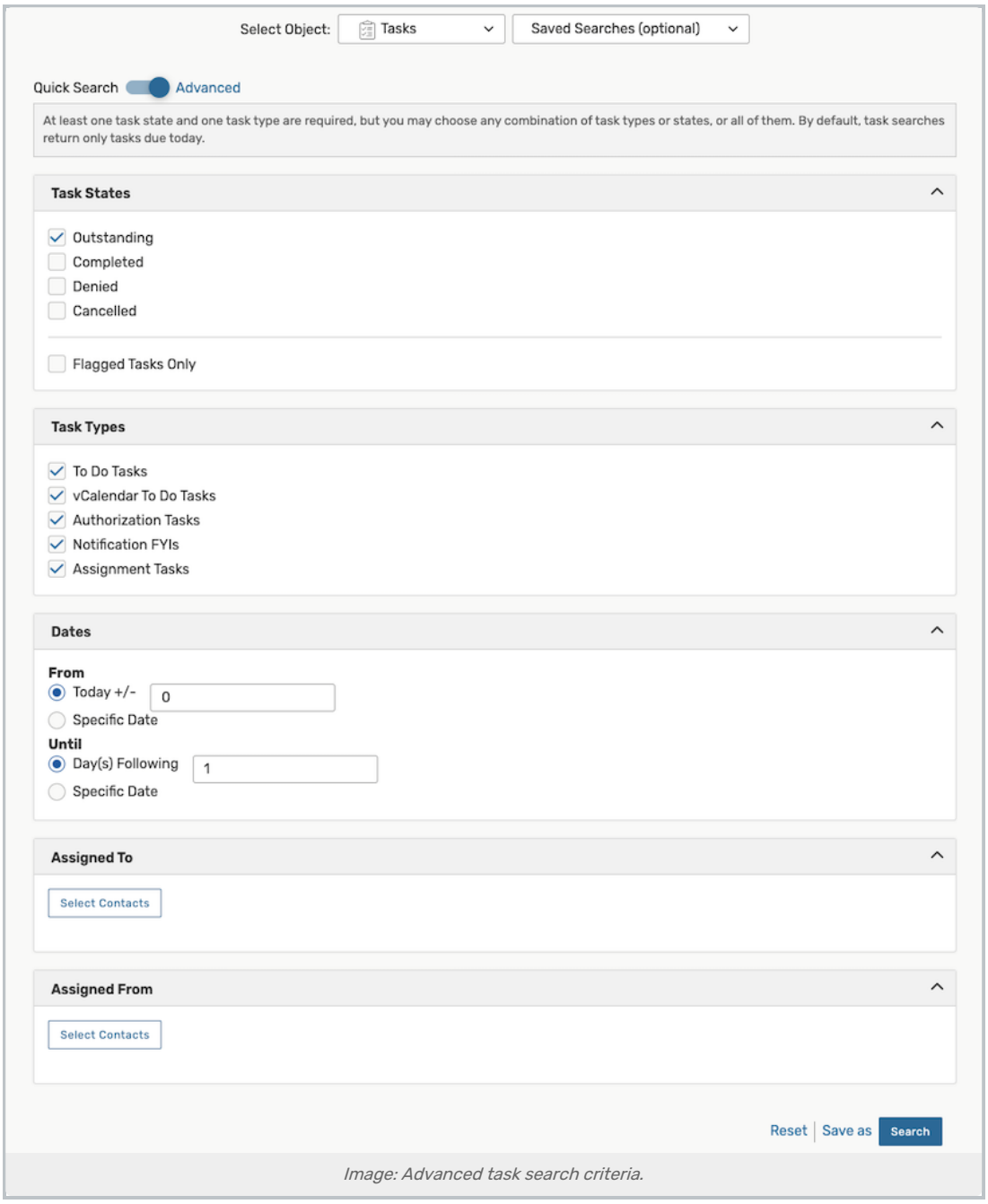

Image: Advanced task search criteria.

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

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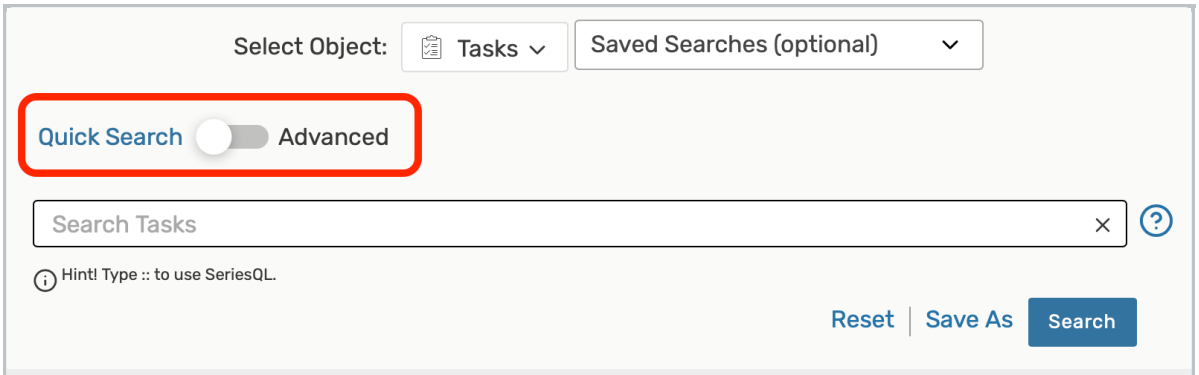

Image: Use the toggle to switch to Advanced.

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

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.

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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**.

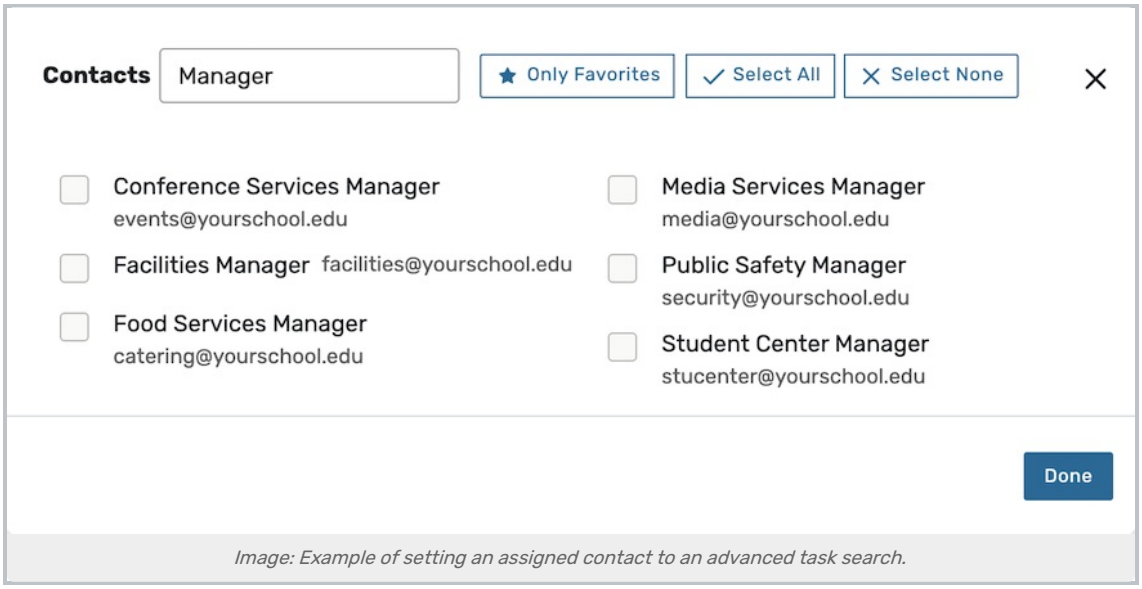

Image: Example of setting an assigned contact to an advanced task search.

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.

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- Click **Save**.

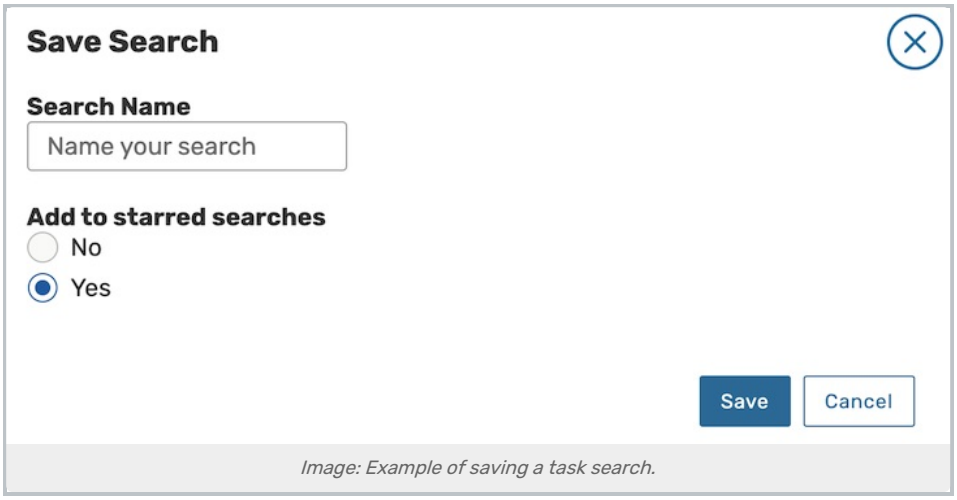

Image: Example of saving a task search.

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