Running Searches in Connect25

Security Note

What you are able to see will depend on your security rights.

In Connect25, users can search for organizations, events, and users. To open a search page, expand **Organizations**, **Events**, or **Users** in the sidebar and select **Search**.

Running an Organization Search

To run an organization search, navigate to **Organizations** > **Search**. Type a keyword in the search box, and/or choose any filters you want to apply:

- Status (admin only)
- Categories
- Types

Select **Search** or press Enter. Each filter you apply appears under Active filters as a removable tag. Select the x on a tag to remove that filter, or select **Clear filters** to remove all of them.

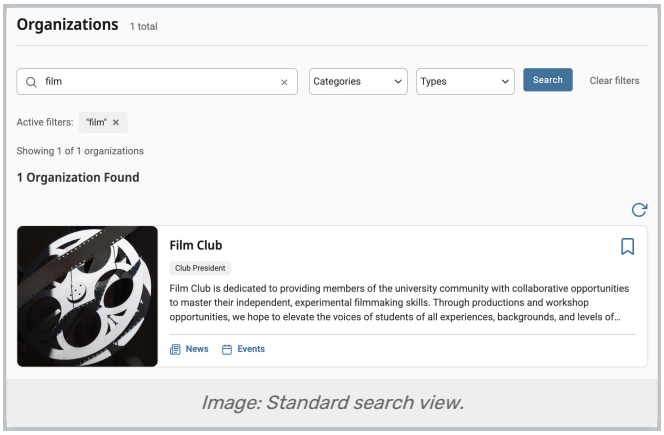


Image: Standard search view.

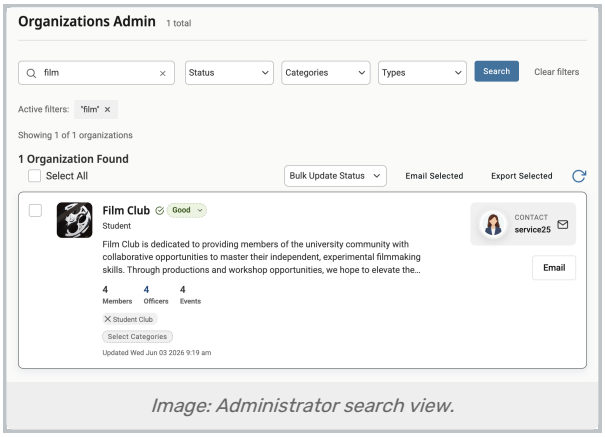


Image: Administrator search view.

Each result shows the organization's image, name, and description, with links to its News and Events. Select the bookmark to follow the organization.

Connect25 administrators see an expanded version of this page titled Organizations Admin. Each administrator result also shows the organization's status, its member, officer, and event counts, its categories, its primary contact, and an Email button.

Bulk Editing (Admin only)

Administrators can bulk edit organizations from the Organization Search.

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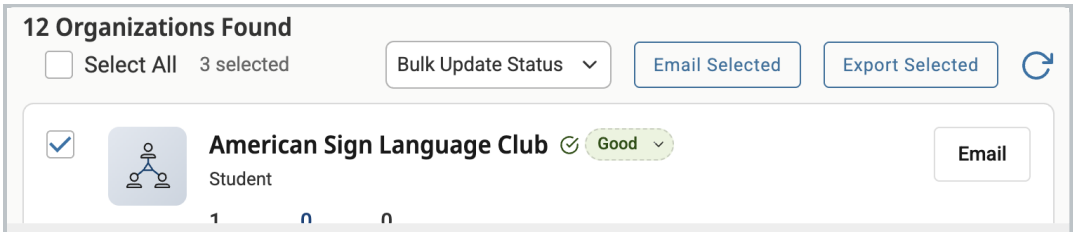


Image: Organization bulk editing options.

Use the checkboxes to select specific organizations, or check the **Select All** box. Next, use the actions at the top of the results:

- **Bulk Update Status** - Change the status of the selected organizations.
- **Email Selected** - Email members of the selected organizations.
- **Export Selected** - Export details for the selected organizations.

Running an Event Search

Event Searches allow you to find events hosted by Connect25 organizations.

To run an event search, navigate to **Events** > **Search**. Type a keyword in the search box, and/or choose any filters you want to apply:

- Type of Event - Choose All Events, Attending (events you are registered for), Promoted, or Following.
- Organizations - Select one or more organizations to show only their events.
- Time range - Choose Upcoming (the default), Today, This Week, This Month, Past Events, All Time, or Custom.
    - Past Events shows events from the last three months. This Week and This Month start today and look ahead, rather than following the calendar week or month. To search a specific range, choose Custom, then set both a Start date and an End date. No results appear until both dates are set.

Select **Search** or press Enter. Results are sorted by start date, with the earliest event first.

Each filter you apply appears under Active filters as a removable tag. Select the x on a tag to remove that filter, or select Clear filters to remove all of them.

Exporting Event Results

Users with Read access to the Report Security function can use Export Results to export the events that match the current search and filters.

Select **Export Results**, then choose how to arrange the report:

- **Report Rows Per** - Choose Occurrence (the default) or Event.
- **Group By** - Choose None (the default), Category, Event Type, Hosted By, Organization, or Status.

Select **Export** and the report downloads when it finishes. The search must have at least one result and no more than 1,500. Narrow the search if you see a message that it contains too many items.

Running a User Search

Use User Search to look up Connect25 users across your institution, including their organizations, roles, and the

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events they have attended.

> **Security Note**
>
> To use User Search, your role needs the following permission in the Connect25 Security settings:
>
> - **User Search** = **Read**

To run a user search, navigate to **Users** > **Search**. Enter a name, email address, or internal ID into the text box, and/or choose any filters you want to apply:

- All Organizations - Show users who belong to the selected organizations.
- All Roles - Show users who hold the selected roles.
- Status - Choose All statuses or a specific status:
  - Active - The user has a login and it is enabled.
  - No login - The user has no Connect25 login.
  - Login disabled - The user has a login that is disabled.
- Custom attribute filters - Contact custom attributes. Select and choose a contact custom attribute, Operator, and Value (if needed). Multiple attributes can be added. Use the **Remove** button to delete a filter.

To list all users, run the search with no filters applied.

> **Note**
>
> When you choose both an organization and a role, a user must hold that role in that organization to match. Users who hold the role in a different organization are not included.

The results table lists each user's Name, Email, Status, and Organizations, sorted by last name. Select an organization name to open that organization. Select a row to expand it and see more about the user:

- **Contact comment** - Any comment saved on the contact.
- **Organizations** - Each organization the user belongs to, with their roles.
- **Events attended** - Student Engagement events the user has checked in to, with the event date.

Bulk Editing (Admin only)

Users who have permission bulk edit users will see a checkbox on each row and a Bulk actions menu above the table.

To bulk edit users, select the checkbox next to each user that should be included in the edit. Then, select an action from the **Bulk actions** dropdown menu.

- **Add comment** - Replace the comment on every selected user's contact record with the same new comment.

> **Warning: Comments Are Replaced**
>
> Adding a new comment will overwrite the existing comment for a user. Copy any comment you want to

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keep before you apply a new one.

- **Email selected** - Open the email panel to write to the selected users. Selected users who have no email address on file are skipped.

Choose **Clear selection** to deselect all selected users.

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