Running Reports and Creating Searches in Resource25

This job aid provides the steps required for running reports. Running reports are dependent on creating searches and search criteria. The beginning of this job aid assumes users will use currently existing searches. Page 8 shows how to create new searches.

Step 1. Log into Resource25 with your User Name and Password.

Step 2. Click the for Report Directory.

The Report Directory window opens.
Step 3. Browse through the available reports under the **Groups** and **Index** tabs.

**Note:** For this example, we will use the Daily Room Sheet report. This is found in the Index tab under the A-D folder. It can also be found in the Groups tab under the Calendars folder.

Step 4. Click on a folder under the Index or Calendars tab.

Step 5. Click on a **Report Name**.

![Report Directory](image)

**Note:** Browse the Description on the right. It will tell you what parameters are needed. Also note the Searches that will be needed. Some reports have multiple searches. In the example above both Event and Space Searches are needed.

**Note:** Jump to page 8 to learn how to create searches.

Proceed to the next step to browse currently available searches.

Step 6. Click the down arrow to the right of **Event Search**: and choose **(Other Search)**.

<table>
<thead>
<tr>
<th>Event Search:</th>
<th>(none)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Space Search:</td>
<td>(none)</td>
</tr>
<tr>
<td>Report Date:</td>
<td>(Other Search)</td>
</tr>
</tbody>
</table>
The **Select Event Search** window opens.

**Step 7.** Click on **My Searches**.

The list of **Searches** is displayed.

**Note:** You may also choose from Searches created by other users who have shared them. Be sure you understand the searches and validate the results. The names of the searches are personalized and may not mean the same to you as they mean to the person who created the search.
Step 8. Click on a **Search**.

![Select Event Search window]

Step 9. Click **OK**.

**Note:** Continue to next steps to choose a Space Search. Some reports only require 1 Search.

Step 10. Click the **to the right of Space Search:** and choose (Other Search).

The **Space Event Search** window opens.
Step 11. Click on **My Searches**.
The list of **Searches** is displayed.

![Select Space Search](image)

Step 12. Click on a **Search**.

![Select Space Search](image)

Step 13. Click **OK**
Step 14. Click the \( \downarrow \) to the right of Report Date: and choose a date.

Note: For this report, a single day is selected. Some reports will have date ranges.

Step 15. The Report Screen opens

Step 16. Click \( \text{view} \) to view the results of the report.
### Daily Events
**Monday, February 4 2008**

<table>
<thead>
<tr>
<th>Event Times</th>
<th>Location</th>
<th>Event Name / Title</th>
<th>Contact</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00 AM</td>
<td>Convention</td>
<td>Reception</td>
<td>Jim Sullivan</td>
<td>500-090745</td>
</tr>
</tbody>
</table>

**Note:** Return to step 6 if your report requires more than one Search.
Creating Searches in ReservIt

This section will describe how to create Searches. Searches need to be added to Report Requests to successfully run reports.

**Note:** The objective of creating the first search, an Event Search, will be to choose any Non Academic Event. Searches you create for your own offices can be more specific.

**Step 1.** Choose 📚 to open the Event Directory search.

**Step 2.** Click 💾 to open the Search tool.

The **Event Directory** window is shown below.

**Step 3.** Click 💻 Add...
Step 4. Choose the **Events** and **Specific Events**...

Step 5. Click the + next to **Special Events** cabinet.

Step 6. Click the + next to **FY 2007-2008 Scheduling Offices**.

The Select Events window is shown below.
Step 7. Click on the **Athletics** folder then click ![Add...](image). Repeat for CITS, Campus Services, Chancellor’s Office, Housing, Library, and Student Activities. Basically these will search for any non academic events.

Step 8. Click ![OK](image).

Step 9. Click ![Add...](image).

Step 10. Choose **Events Types**...
The **Event Types** window opens.

**Step 11.** Click any Non Academic Event Types

The **Event Types** may look like the one displayed below.

**Step 12.** Click **OK**

**Step 13.** Click **Save...**
The **Event Search Properties** window opens:

![Event Search Properties window]

**Step 14.** Enter a **Search Name**, for this example call it **Non Academic Events**. Click the checkbox to **Share the search with Other R25 Users**.

![Event Search Properties window with Share checkbox checked]

**Step 15.** Click **OK**.

**Note:** The objective of creating the second search, a **Space Search**, will be to choose any Non Academic Space. Searches you create for your own offices can be more specific.

**Step 16.** Choose **Space Directory** to open the Space Directory Search.

**Step 17.** Choose **Search** tab to open the Search tool.

The **Space Directory** window is shown below.
Step 18. Click Add...
Step 19. Choose the **Spaces** and **Specific Spaces**...

The **Select Spaces** window looks like this below.
Step 20. Click on the Auditorium folder then click [Add ->]. Repeat for CITS Labs & Partnered Labs, Computer Lab, Conference Room, Foyer, Hallway, Library Space, Lounge, Residential Life, and Campus Services. Basically these will search for any non academic spaces.

Step 21. Click [OK].
Note: Here is an alternative method to search by individual rooms. If you are satisfied, proceed to Step 25 to save the search.

Step 22. Click the drop down menu next to Categories and choose Full List.

Step 23. Click the individual room and click Add ->. Repeat as necessary.

The Select Spaces window may look like the one displayed below.
Step 24. Click OK.

Step 25. Click Save...

The **Space Search Properties** window opens.

Step 27. Enter a **Search Name**, for this example call it **Non Academic Spaces**. Click the checkbox to **Share the search with Other R25 Users**.

Step 28. Click OK.