S C H E D U L I N G @ C O R N E L L

EVENT & CLASS SCHEDULING USING 25LIVE

Objectives

In this training, we will:

- create and schedule events using 25Live
- view location availability from the perspective of schedulers, general users, and enhanced users
- find Tasks, Events, Organizations, Locations, Resources, and Reports
- review Cornell event and class processes
- learn about 25Live searches including public, shared, and advanced searches

for event scheduling, we will:

- locate events using the availability grid, task list, and searches
- approve location assignment requests
- create events
- assign multiple locations to a single event
- reschedule events
- confirm events using the built-in mail interface
- copy and relate events

for class scheduling, we will:

- review the process necessary to have a class event sent to 25Live for scheduling
- locate classes loaded from PeopleSoft
- assign locations to classes
- make requests for location assignments outside our area
- edit class dates to make the location available for an event

Overview

This training focuses on how to perform basic scheduling tasks in 25Live using a web browser. There is more to 25Live than what is covered in this class so it is best to think of this training as a good foundation.

To schedule events and class sections effectively in 25Live, we need to understand both the particulars of using the application as well as Cornell business practices relating to scheduling. The Cornell Event Registration Process is now integrated within 25Live and is part of a new set of business processes. We will cover these processes in detail as we progress through the training.

We start with events since 25Live includes hundreds more locations for online event requests. Requestors, schedulers, event planners, and approvers will use 25Live as the structure for event details. 25Live also serves as the basis for class scheduling and we will review that process as part of this training.

Ancillary activities abound and include keeping in touch with requestors and other schedulers using 25Live's built-in email and workflow; requesting location assignments for locations not included in our assignment rights; scheduling events around classes and other events; rescheduling events in different locations and at different times; relating events that have a common theme; running reports and so on.

Scope

The scope of this training is for you to access 25Live, to find existing or create new events, to assign locations (or request locations not in your "jurisdiction"), to advance the event scheduling process, and to understand how reports are run.

Scheduling Support

Documentation on scheduling processes and the use of 25Live can be found at the Academic and Event Scheduling website scheduling.cornell.edu

This website provides extensive information to help plan, create, and schedule events as well as provide timely announcements and identify support paths.
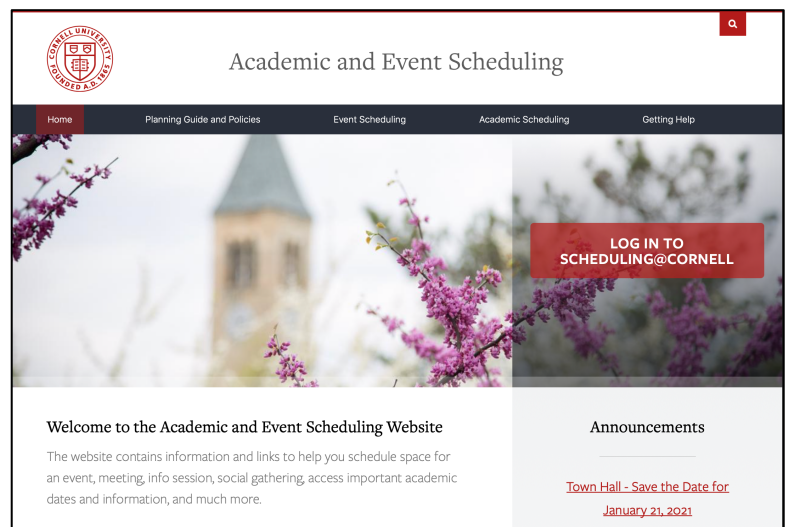
During this training, we will reference sections from this website.

Central and distributed support for 25Live is readily available. When system issues occur or you cannot login to your account, email **scheduling@cornell.edu**. The email will be forwarded to a ticketing system which is monitored by support staff who will get back to you as soon as possible.

Both event and class scheduling support is distributed. For example, Colleges, Departments, Student and Campus Life, and Centers support their areas. Class scheduling support is distributed across colleges with the college registrar's office being the focal point. Different rules apply across colleges and units, so you will want to be sure you understand your area's processes and procedures.

If you are not sure who to contact, email **scheduling@cornell.edu** and we will be glad to direct your question to the right source.

Contents

This training will cover a host of topics. Cornell business processes are emphasized as we walk through 25Live options. The training is now divided into nine "modules" including on-line presentations you can walk through at your own pace. Modules may contain a demonstration where you can see how particular actions are accomplished. After each demo, you will be able to log into the 25Live test / training instance and work though the actions outlined. The class is paced such that we will need to complete modules and review session in tandem before moving to the next module. This allows time to interact and ask questions based on topics covered.

A complete set of 25Live scheduler training is scheduled on a weekly basis and you will need to set aside time to view the modules, complete the activities and meet via zoom to discuss the topics, ask questions and measure progress.

The modules are as follows:

- Module 1: Introduction and Setup (this module)
- Module 2: Searches and Location Availability - Monday Review
- Module 3: Event Form Basics and Communication with Others
- Module 4: Assignment Policy and Workflow
- Module 5: Event Processes and Approvals
- Module 6: Adjusting Events including locations and dates
- Module 7: Class Events and their life cycle
- Module 8: Scheduler Tools
- Module 9: Basic Reporting

Some modules are grouped together and all in that set will need to be completed before the review session as indicated in the schedule below:

Friday:
- Module 1 is available. This must be completed by end of day Friday so we can set up your scheduler access in 25Live before Monday.

Monday: Module 1 & 2
- Assuming you have completed Module 1 and sent a screen shot showing your success to tdb1@cornell.edu, you will receive an email with the link to Module 2
- 3:00-4:30pm[1]: Zoom Review Session is an introduction to each other, address any setup or access issues, discuss issues, and gather additional topics you would like to see discussed

Tuesday: Module 3 & 4
- Assuming you have completed Modules 1 and 2 and attended the review, you will receive an email with the links to Modules 3 and 4 immediately after Monday's review session
- 3:00-4:30pm: Zoom Review Session to review topics, answer any questions, discuss issues

Wednesday: Module 5 & 6
- Assuming you have completed Modules 1 through 4 and attended the reviews, you will receive an email with the links to Modules 5 and 6 immediately after Tuesday's review session
- 3:00-4:30pm: Zoom Review Session to review topics, answer any questions, discuss issues

Thursday: Module 7 & 8
- Assuming you have completed Modules 1 through 6 and attended the reviews, you will receive an email with the links to Modules 7 and 8 immediately after Wednesday's review session
- 3:00-4:30pm: Zoom Review Session to review topics, answer any questions, discuss issues

Friday: Module 9
- Assuming you have completed Modules 1 through 8 and attended the reviews, you will receive an email with the links to Module 9 immediately after Thursday's review session
- 9:30-11:00am: Zoom Review Session to wrap up the training, run a few reports, and address any unanswered questions.

Handouts will be available for each day and will cover topics from that day's Modules. In some cases, the handouts will cover topics not included in the module. For example, there is a section below that covers "User Preferences" which is not included in the module. We will discuss these additional topics as needed in the review sessions.
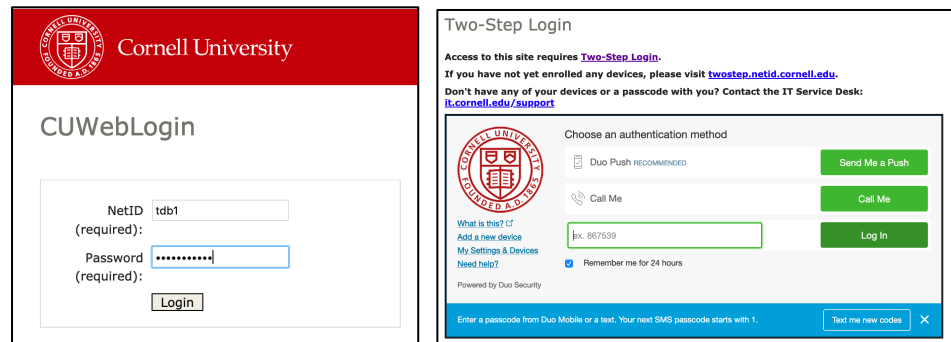
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[1] These review sessions may not take the full 90 minutes but will provide time to discuss topics of the day, address any issues and concerns, as well as provide time for us to share out own scheduling experiences.

Logging into 25Live using a Web Browser

To log into the Cornell TEST instance of 25Live, open a web browser[2] and use the following URL to access the "25Live Pro" interface[3].
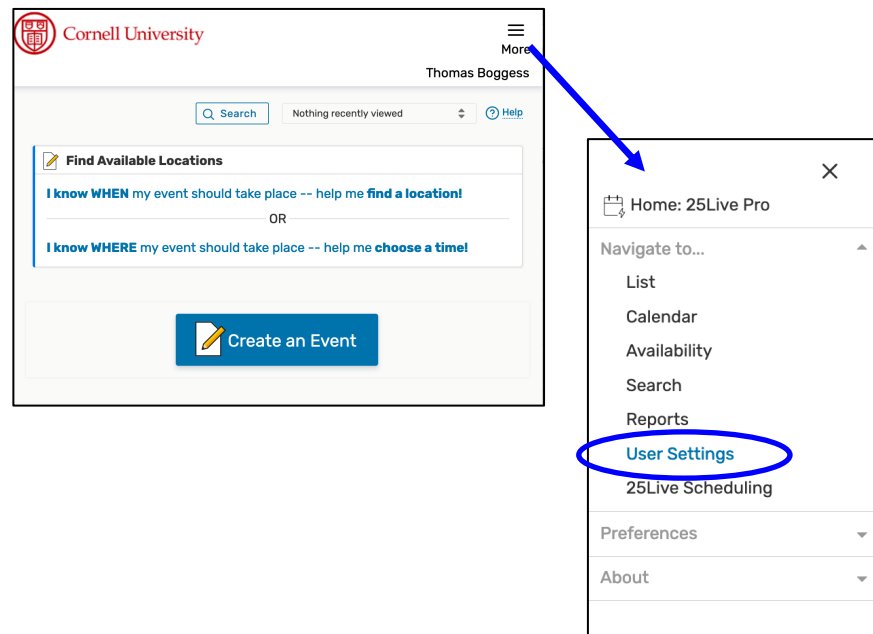
`https:\\25live.collegenet.com\pro\cornellt` ← **ends with 't'** (for training)

You will be authenticated using CUWebLogin and Duo

Upon successful login, a simplified dashboard is displayed

As a first task, let's look at user settings. User Settings are accessible by clicking the **More** menu at the top right of the screen. There are a few preferences you can set up in 25Live[4].

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[2] CollegeNET recommends Firefox, Chrome, or Microsoft Edge

[3] There is a simpler interface called "Scheduling" which is the default view when using a mobile device such as a phone.

[4] Note: preferences set in this training environment will *not* be reflected in Production. You will need to reset them once you have logged into 25Live Production.

User Settings

For this training, let's enter an email signature and check the box to include yourself on all emails you generate when using this instance.

You will need to repeat this step once you log into the production environment.

Additional user settings can be set for **Date / Time Preferences**. These preferences effect how the calendar will show as *you* use the system. Some users prefer to see Sunday as the first day of the week, others Monday.

Return to the main page by clicking **25Live Pro** at the top of the page
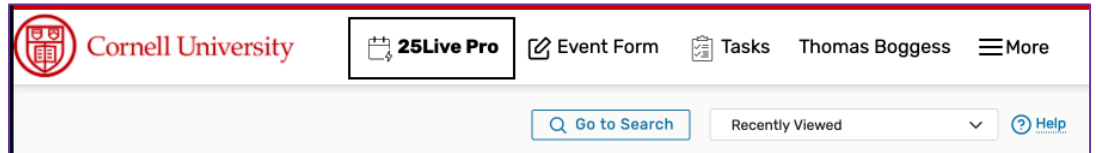
Module 1 Activity A

Take a screen shot of the "survey" indicating your success in accessing the handout, demos, audio and zoom.

Please email tdb1@cornell.edu with the following info:

- your expected security group / scheduling area
- any questions you have about access or the class
- a screen shot similar to the one below of the "surbey"