

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.

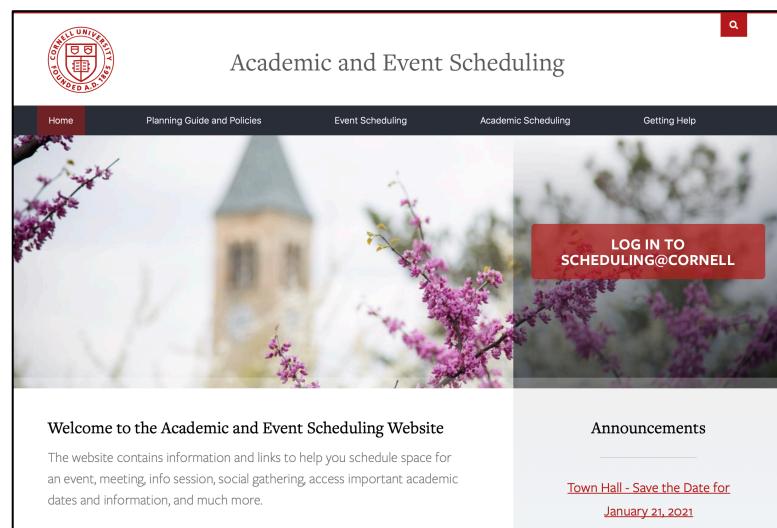
Scope

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
- 3:00-4:30pm¹: 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.

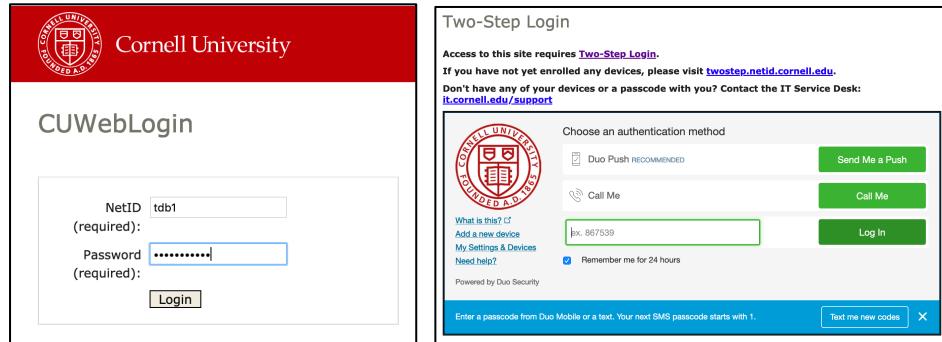
¹ These review sessions may not take the full 90 minutes but will provide time to discuss topics of the day, address any issues and concerns, as well as provide time for us to share our own scheduling experiences.

Logging into 25Live using a Web Browser

To log into the Cornell TEST instance of 25Live, open a web browser² and use the following URL to access the "25Live Pro" interface³.

<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 25Live⁴.

The screenshot shows the 25Live Pro interface. The main area has a search bar, a 'Create an Event' button, and a sidebar with various navigation links. A blue arrow points from the 'More' menu icon on the top right to the 'User Settings' link in the sidebar.

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.

User Settings

Edit Contact Info Date/Time Preferences

Basic Information

Name Prefix:
First Name: Thomas
Middle Name:
Last Name: Boggess
Name Suffix:
Title:
Internal ID:

Work Address

Street Address:
City:
State / Province:
Zip / Postal Code:
Country:
Phone:
FAX:

Email

Email Signature:
Tom Boggess
B7 Day Hall
Cornell University
607.275.9192
tdb1@cornell.edu

Copy myself on all emails I send

Home Address

Street Address:
City:
State / Province:
Zip / Postal Code:
Country:
Phone:
FAX:

Save Contact Information

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.

User Settings

Edit Contact Info **Date/Time Preferences**

Date and Time Display

Example Date and Time Display: **Fri Jan 10 2020 11:30 am**

Date Order:

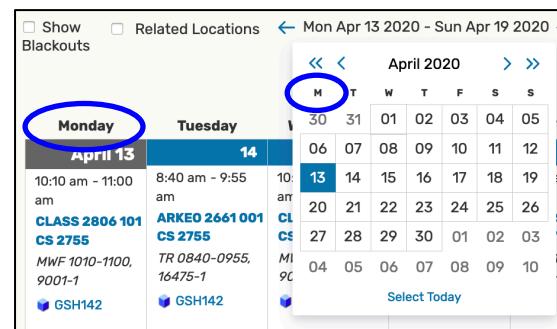
Month Day Year Day Month Year Year Month Day

Time Display:

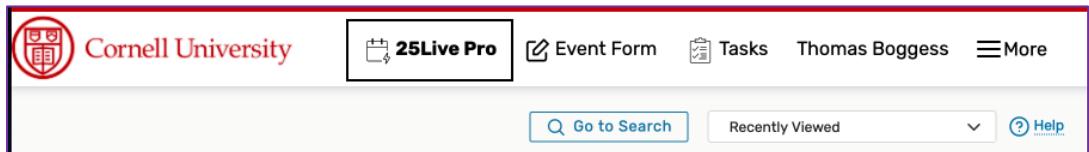
12 hour clock 24 hour clock

Calendar Start Day

Week start day: Monday Sunday



Return to the main page by clicking **25Live Pro** at the top of the page

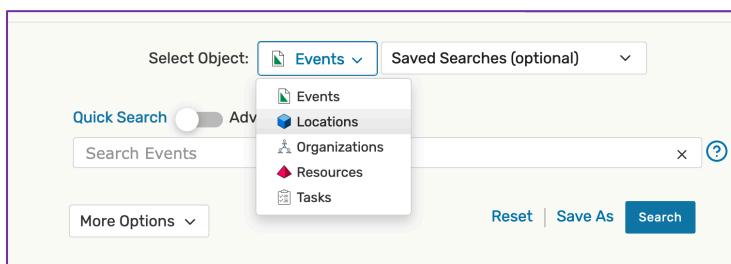


Create a Search of Locations of Interest

Searching is key functionality you will use in 25Live to find events, locations, resources, and organizations. Let's start our work by creating a location search that relates to your scheduling.

Q Go to Search

Note the **Go to Search** button available on most pages in 25Live. Clicking that button takes us to a page where we can run or create searches. In this case, we want to create a location search.



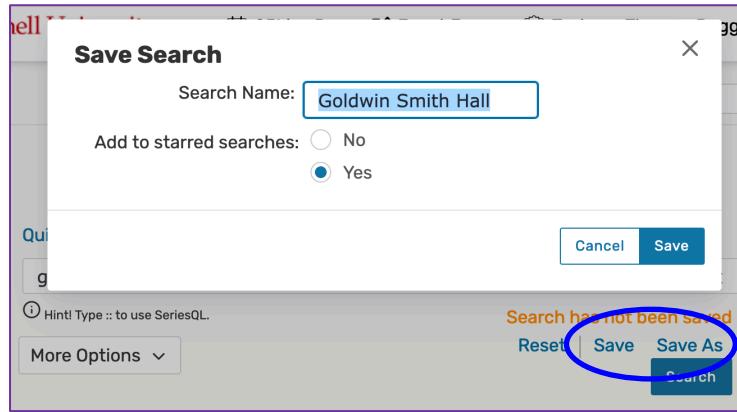
You can create a quick search by adding some portion of the building name

| Name | Formal Name | Categories | Features | Layouts | Max Capacity |
|--------|------------------------|---------------------------------------------------------------------------------------------------|----------|-------------|--------------|
| GSH122 | Goldwin Smith Hall 122 | Building - Goldwin Smith Hall, Campus - Ithaca, Schedule25 Bulk Scheduled Rooms, Type - Classroom | | Instruction | 26 |
| GSH124 | Goldwin Smith | Building - Goldwin | | Instruction | 26 |

To see the number of items returned by your search, scroll to the bottom of the page.

| 21 Matching Locations | | Page 1 of 1 | |
|-----------------------|----------|-------------|-----------|
| First | Previous | 1 | Next Last |
| Items per page | | 25 | ▼ |

Save the search by clicking on **Save** or **Save As** and entering a descriptive name for the search.



Now you can use that saved search throughout the system.

Location Availability

Let's take a look at the availability of locations using your search.

Click on the **More** menu and select **Navigate to... Availability**

The image contains two screenshots. The left screenshot shows the Cornell University homepage with the 'More' menu open, displaying options such as Home, Event Form, Tasks, and Availability. The 'Availability' option is circled with a blue oval. An arrow points from this menu to the right screenshot, which shows a detailed view of the 'Availability' section with options like List, Calendar, and Search.

Cornell University 25Live Pro Event Form Tasks Thomas Boggess

Go to Search Recently Viewed

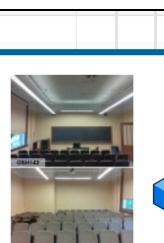
Legend GSH Locations Tue Mar 10 2020 View Standard (default) Overlapping (as of 6:39 pm)

| | 7 | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
|----------|--------------|--------------------|--------------|---------------|-------------------|---------------------------------|-------------------------------------|------------------|---|---|---|---|---|------------------|
| ☆ GSH122 | | | LATIN 620... | GREEK 61... | LATIN 322... | CLASS 7808 101 2755 | | | | | | | | |
| ☆ GSH124 | | | | AMST 343... | | SPAN 6100 101C... | HIST 2251... | | | | | | | |
| ☆ GSH132 | | | | ECON 402... | VISST 20... | ANTHR 30... | ECON 466... | | | | | | | |
| ☆ GSH142 | | ARKEO 26... | PHIL 6475... | PHIL 2415... | ASIAN 33... | | | | | | | | | |
| ☆ GSH144 | | ENGL ... | ENGL 1147... | ARTH 1171... | | GOVT 6846 101 CS 2755 | Bethany Christian Campus Ch: R25-64 | | | | | | | |
| ☆ GSH156 | ENGL 1191... | ENGL 112... | GERST 117... | ENGL ... | GERST 6230 101... | Alpha P... Cr?me de Cornell:... | | | | | | | | |
| ☆ GSH158 | ENGL 118... | ENGL ... | ENGL ... | ENGL 1147... | ENGL 326... | Internationa... | | | | | | | | |
| ☆ GSH160 | PHIL 1110... | ENGL 1167... | ENGL 289... | ENGL 1147... | ENGL 1111... | Planne... | International Jus... | Humor Us... | | | | | | |
| ☆ GSH162 | HIST 1200... | STS 1123 ... | ENGL 380... | ENGL 1111 ... | ENGL 110... | | | | | | | | | |
| ☆ GSH164 | | RUSS... | RUSS... | RUSSA 1... | RUSS... | ENGL 4810 1012... | LATIN 7222 101C... | | | | | | | |
| ☆ GSH181 | | ROMS 351... | | | GERST 40... | SPAN 327... | Bethany Christian Campus Ch: R25-64 | | | | | | | |
| ☆ GSH236 | ENGL 116... | MEDVL 21... | ENGL 1170... | ENGL 202... | ENGL 254... | | Pi Lambda Si... | | | | | | | |
| ☆ GSH283 | ENGL 1170... | ASIAN 33... | ENGL 116... | ENGL 289... | ASRC 265... | Asian American Interv... | | | | | | | | |
| ☆ GSH348 | | SPAN ... | ENGL ... | LATIN 7... | SPAN ... | SPAN ... | CFI Gbo... | Pre-Med Minor... | | | | | | |
| ☆ GSH350 | SPAN ... | ENGL 116... | | | | COLLS 2001 101 ... | | | | | | | | Midnight Come... |
| ☆ GSHG19 | | ENGL 4270 101 C... | | | | ARTH 6540 101 C... | | | | | | | | |
| ☆ GSHG20 | | AMST 239... | ENGL ... | | | | Bogges... | | | | | | | |
| ☆ GSHG22 | PHIL 230... | HIST 1950... | MEDVL 23... | ENGL 328... | ARTH VCC | | Medioc... | | | | | | | |

Select one of the location searches available in the dropdown list above the grid. The locations shown is from my saved search for Goldwin Smith Hall. A day was chosen during the Spring 2020 term to demonstrate availability with classes loaded.⁵ Note the Legend button to the left of the search dropdown.

Summary information for locations or events can be viewed by hovering over the relevant item.

| |
|----------|
| ☆ GSH142 |
| ☆ GSH144 |
| ☆ GSH156 |
| ☆ GSH158 |
| ☆ GSH160 |
| ☆ GSH162 |
| ☆ GSH164 |
| ☆ GSH181 |
| ☆ GSH236 |
| ☆ GSH283 |
| ☆ GSH348 |
| ☆ GSH350 |
| ☆ GSHG19 |
| ☆ GSHG20 |



GSH142
Goldwin Smith Hall 142
Layouts:
Instruction
Capacity:
79

| | | | | | |
|------------------|-----------------|-----------------------|-----------------|--------|---|
| 10 | 11 | 12 | 1 | 2 | 3 |
| GREEK 6102... | LATIN 3220 1... | CLASS 7808 101 2755 | | | |
| AMST 3434 001... | | SPAN 6100 101 CS 2755 | AMST 2251 10... | | |
| ECON 402... | | | 00... | 001... | |
| PHIL 3475 | | | 00... | 001... | |
| ENGL 1147... | | | 00... | 001... | |
| ENOL 1120... | | | 00... | 001... | |
| ENOL 1167... | | | 00... | 001... | |
| STS 1123 1... | | | 00... | 001... | |
| RUSSA 1... | | | 00... | 001... | |
| ROHS 3512... | | | 00... | 001... | |
| MEDVL 21... | | | 00... | 001... | |
| ASIAN 33... | | | 00... | 001... | |
| SPAN 12... | | | 00... | 001... | |
| ENOL 1168... | | | 00... | 001... | |
| ENOL 4270... | | | 00... | 001... | |
| AMST 2391... | | | 00... | 001... | |
| PHIL 2300 00... | HIST 1950 00... | MEDVL 2355... | ENGL 3280 1... | | |

AMST 3434 001 CS 2755
Reference: 2020-AAALFR
Title: Underground RR: Grant Writing
Reservation: TR 1010-1125, 18570-1
Event Time: 10:10 am - 11:25 am
Organization(s): AMST
Description: PI Instructor - Gerard Laurence Aching
Location(s): GSH124
Bogges...

⁵ Classes and events shown may not reflect actual production classes and events.

More detailed information is displayed when you click on the object.

The screenshot shows the 'Details' tab selected in the navigation bar. The page displays various details about room GSH142, including:

- Comments:** none
- Default Instructions:** none
- Features:** ADA - Assistive Listening Sys, ADA - Wheelchair Accessible, AV - Audio Jack, AV - Blu-Ray Player, AV - Connection, HDMI, AV - Connection, VGA, AV - DVD Player, AV - Mic, Lapel, AV - Projector, Data, AV - Projector, Transparency, Board - Chalk, Board - Writing, Furniture - Instr Table/Desk, Furniture - Tablet Arm Chairs, Furniture - Upholstered, Network - Wired, Network - Wired or Wireless, Network - Wireless, Projection Screen/Wall, Room Darkening Shades.
- Layouts:** Max Capacity 79, Instruction (default) 79.
- Categories:** Building - Goldwin Smith Hall, Campus - Ithaca, Schedule25 Bulk Scheduled Rooms, Type - Classroom.
- Related Spaces:** none.
- Location Scheduler:** none.
- Images:** A thumbnail image showing the interior of a classroom with rows of desks and a chalkboard, labeled 'GSH142'.
- Map:** A map showing the location of Goldwin Smith Hall (Tric hammer Falls) on a campus map.

To return to the availability grid, use the **More > Availability** menu at the top right of the page or click the browser's back arrow.

Availability Grid views by Users-General or Users-Enhanced

There are roughly five levels of access to 25Live: general access users (the default), enhanced access users, schedulers, ERP approvers, and administrators

General access users can see only event details on events they have created.

The screenshot shows the availability grid for Goldwin Smith Hall (GSH142) from Tuesday, Feb 04, 2020, to Wednesday, Feb 05, 2020. The grid highlights several private events, notably for 'Boggess - ECON 4500 Office Hours' on Feb 05, 2020, from 9:16 am to 11:00 am. The grid includes a legend, date range selector, and a zoomed-in view of the highlighted event.

| | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 |
|--------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----|
| GSH122 | (Private) | |
| GSH124 | (Private) | |
| GSH132 | (Private) | |
| GSH142 | (Private) | |
| GSH144 | (Private) | |
| GSH156 | (Private) | |
| GSH158 | (Private) | |
| GSH160 | (Private) | |
| GSH162 | (Private) | |
| GSH164 | (Private) | |

Boggess - ECON 4500 Office Hours
Reference: 2020-AALWH
Title: Economics 4500 Office Hours - Tom Boggess 2755

Enhanced access users can see event details on any event but cannot edit events they did not create

Legend Goldwin Smith Hr → Tue Jan 28 2020 → View Standard (default) Overlapping (as of 11:25 am) ⌂ ?

HIST 3677 101 CS 2755 Tentative 2020-AAALHT Wed Jan 22 2020 1:25 pm Repeats every week on Monday and Tuesday

Details Occurrences Calendar Task List

Schedulers can edit any event in the system and can reserve and assign locations for which they have assignment rights

Legend Goldwin Smith Hr → Tue Jan 28 2020 → View Standard (default) Overlapping (as of 11:25 am) ⌂ ?

HIST 3677 101 CS 2755 Tentative 2020-AAALHT Wed Jan 22 2020 1:25 pm - 2:40 pm Repeats every week on Monday and Tuesday

Details Occurrences Calendar Task List

ERP approvers have rights to assign ERP resources and see all events but, generally, not assign locations