# Capstone Project Guide

**for**

# ISM Students & Faculty

# 2016/2017
# Academic Year

**Heinz College**
**School of Information Systems & Management**
**Carnegie Mellon University**

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# IMPORTANT:

1. EVERY TEAM MEMBER SHOULD READ THIS HANDBOOK IN ITS ENTIRETY

2. SIGN YOUR AGREEMENTS AND/OR NON---DISCLOSURE AGREEMENTS AND RETURN TO ISM OFFICE (if applicable)

3. TURN IN YOUR SIGNED ACKNOWLEDGEMENT (p. 3 of this guide) AND PROJECT DESCRIPTION TO ISM OFFICE (1104 HBH)

4. RETRIEVE TEAM CHARGE STRING AND TELEPHONE PIN AFTER TURNING IN RECEIPT OF ACKNOWLEDGEMENT

5. START THINKING AHEAD FOR MIDTERM PRESENTATION DATE AND LOCATION

Acknowledgement of Receipt (S16)

It is the responsibility of team members to be aware of all rules and regulations governing the capstone projects. Read over this handbook carefully. The team project manager and team financial manager must sign and turn in a copy of this form to the ISM office, Hamburg Hall, Room #1104 by the end of the first week of classes.

Client (Team) Name:______________________________________________________________

Team Project Manager: ______________________________________________________________

Signature PRINT NAME Date

Team Financial Manager: ______________________________________________________________

Signature PRINT NAME Date

## 1. GOALS

The Capstone Project provides an opportunity to apply the skills developed in the classroom to a real world scenario. In doing so, students begin to make the transition from the academic world to the environments in the marketplace. In these environments, the challenges of team building, resource development, client relations, limited information, and pressing deadlines are as real and important as the technical and managerial components of any task.

The project is a semester-long, intensive, team-based experience focusing areas of expertise in the MISM or MSISPM program. A typical project includes design and development of an information system for an external client – often a corporation or public agency. Each project results in a final report and presentation as well as a demonstration, a prototype, or a significant portion of a larger system.

## 2. PROJECT EXPECTATIONS & MILESTONES

### 2.1 Expectations

Project teams must provide two electronic copies (PDF format) of the final report and presentation: one to the Associate Dean and one to the Program Director. The digital report must have all of the charts, tables, and graphics incorporated into the document. If the client deliverable also includes a prototype system, a copy of the system must also be provided at submission.

The final project report and presentation MUST include:

- Executive Summary
- Project Objectives
- Project Methodology
- Data Analysis
- Conclusions and Recommendations
- Lessons Learned
- Suggestions for Future Work

The length of the final report will depend upon the project scope and deliverable. Project teams should clarify this with their faculty advisor as soon as possible.

### 2.2 Milestones

While projects may differ considerably in format, there are common milestone events for all project teams.

<u>2.2.1 Fall Projects</u>

- **Early September:** Kick-off meeting with client (refine problem statement, scope, and work plan)
- **Mid-October (end of Mini 1):**
    - Midterm presentation to client, Faculty Advisor, Program Director and Associate Dean (update on progress)
    - Peer review of individual team members / student consultations with advisor
- **Late November/early December:**
    - Poster Day Presentation
    - Final presentation to client and ISM student body
- **End of Semester (end of Mini 2):**
    - Completion and distribution of the final report
    - Peer review of students
    - Student evaluation of faculty advisor

2.2.2 Spring Projects

- **Late January:**
  - Kick-off meeting with client (refine problem statement, scope, and work plan)
  - Meet with Program Director/Academic Coordinator to discuss Education Agreement

- **Early March (end of Mini 3):**
  - Midterm presentation to client, Faculty Advisor, Program Director and Associate Dean (update on progress)
  - Peer review of individual team members / student consultations with advisor
- **April/May:**
  - Poster Day Presentation
  - Final presentation to client and ISM student body
- **End of Semester (end of Mini 4):**
  - Completion and distribution of **the final report** (see section 2.1)
  - Peer review of students
  - Student evaluation of faculty advisor

## 2.3 Peer Review of Team Members and Individual Consultations

Peer review – the giving and receiving of constructive criticism in a professional manner – is an activity that professionals are increasingly being asked to undertake and is essential to the development of individual team members. For those doing well, it provides validation and an opportunity to discuss continued growth. For those doing poorly, it provides awareness and the opportunity to improve their performance during the remainder of the semester.

Peer review will be facilitated by the faculty advisor and will include written evaluation of team members as well as self-evaluation. While the methods and frequency may vary (some will process peer reviews monthly while others may use only one final review), each team member will have the opportunity to experience the process.

While grades will be assigned by the faculty advisor, peer review results will be taken into consideration. The results will also provide the advisor with feedback for individual consultations with team members.

Exhibits 1 and 2 (end of guide) are provided as sample peer review forms (the faculty advisor may choose to use another).

## 2.4 Student Evaluation of Advisor

Students will evaluate their project advisors just as they do in other Heinz College courses.

# 3. PROJECT ROLES

## 3.1 Administrative/Faculty Roles

The following have administrative oversight over all teams:

3.1.1 Faculty Advisor

- Appoints financial manager
- Monitors team's progress
- Acts as liaison between the team and client
- Assigns final grade to students

3.1.2 Academic Coordinator & Program Director

- Provide administrative consultation regarding all policies and procedures
- Provide Oracle Account String to Financial Manager and Faculty Advisor (after receiving the team roles & project description)

## 3.2 Student Roles

The following roles will be filled by team members:

3.2.1 Project Manager (in cooperation with all team members)

Provides Leadership:

- Establishes spirit of collaboration and teamwork
- Communicates the team vision
- Resolves problems as they arise
- Focuses and motivates the team on weekly progress and final objectives

Manages project and team contributions:

- Prepares the project plan in collaboration with the team members
- Establishes the project schedule
- Identifies formal and informal team roles for each member of the team
- Schedules team meeting
- Oversees and manages schedule for deliverables and task milestones
- Oversees peer review process
- Organizes the team **mid-term** and **final** presentations
- Submits the **team roles & one-page project description by the end of the 3rd week** of the semester to the appropriate ISM Program Director

Manages Team Communications:

- Schedules weekly meetings with the faculty advisor
- Establishes regular communication with the client
- Organizes visits to the client site, as needed
- Ensures team communications reach each team member
- Schedules all room reservations

3.2.2 Process Organizer (in cooperation with all team members):

- Organizes all team meetings
- Schedules team meetings and communicates schedule to team members
- Locates and acquires site for team meetings
- Ensures all team members are informed
- Motivates team members who are absent or tardy from team meetings
- Sets up team bulletin board with help from Heinz Computing Services
- Records and communicates decisions made at each meeting to team and client
- Schedules and prepares peer reviews in conjunction with faculty advisor

3.2.3 Chief Systems Administrator (in cooperation with all team members):

- Works with Heinz Computing Services with server configuration
- Establishes rules for access to servers, databases, and applications in consultation with the rest of the team
- Establishes security and backup procedures to protect from unauthorized access, intrusion, or disaster

3.2.4 Financial Manager (ASSIGNED by faculty advisor; in cooperation with all team members)

- Confirms the project budget with the ISM Administrative Coordinator
- Obtains authorization for team expenditures from the faculty advisor

- Establishes a budget plan. Obtain project manager and faculty advisor approval for the following: books, software, and hardware components
- Authorizes, tracks, and manages all expenses and ensures project stays within budget
- Reviews accounting reports with faculty advisor monthly to ensure project budget
- Submits Student Reimbursement Form (Exhibit 3) on a timely basis

### 3.3 Client Role

- Provides a prospectus of the proposed work
- Commits to meeting periodically with student team
- Appoints a point of contact during the 15-week semester
- Responds to student inquiries
- Attends the final presentation
- Pays all client expenses

## 4. ADMINISTRATIVE LOGISTICS

Please adhere to the following guidelines for requesting and using CATERING, COMPUTERS AND SOFTWARE, COPY SERVICES, PARKING & TRANSPORTATION, ROOM RESERVATIONS, TRAVEL & UNIVERSITY TELEPHONES:

### 4.1 Catering

The only time a food purchase will be reimbursed with the capstone budget is when it has been pre-approved by the academic coordinator or program director. Teams are not allowed to use budget to order food during meetings, go out with advisor and team, when the client comes in, etc.

### 4.2 Computing & Software

**NOTE: While integral to many of the projects, project teams are not permitted to purchase or download software without prior consent of the University. This includes FREE software available on the web.** Please check with MISM office **BEFORE DOWNLOADING FREE OR PURCHASING** ANY SOFTWARE SERVICE. Send an email with the name(s) of the software to the Academic Coordinator as well as a link to each, a link to the terms and conditions, and a brief explanation of the team use to start approval process.

4.2.1 Computers

Project teams may request a virtual machine for use as a server. Team members can access the server using Microsoft Remote Desktop from their personal computer (on or off campus). Use this link to request a virtual machine http://www.heinz.cmu.edu/computing-services/documentation/systems-group-resource-guide/index.aspx .
Instructions on how to access the team's virtual server will be provided after the virtual server is created.

A physical computer can be requested if all the following conditions are met: 1) The application needed for the project or the activity conducted on the server is incompatible with the virtual computing environment as determined by Heinz Computing Services, 2) Approval from the faculty advisor. The faculty advisor must make the request for a physical server along with the justification to Heinz-computing@andrew.cmu.edu.

All computers used for the project will be reformatted 30 days after the end of the semester.

4.2.2 File Storage

Project files can be stores on the central file server. The initial quota is 5 GB. Additional space can be requested as needed. All files stored on the central server are backed up overnight. Files deleted for longer than 30 days cannot be restored. Email Heinz-computing@andrew.cmu.edu to request file server space or to request file restores from backup.

4.2.3 Software

There is no charge for software that is licensed under an unlimited licensing agreement by the University or by

Heinz College. Some software packages do have an additional charge — even if that software has a licensing agreement with the University or with Heinz College. Such charges will be assessed to the project budget. If there are questions about charges for project software, please email inquiry to Heinz-computing@andrew.cmu.edu. **PRE-APPROVAL IS REQUIRED TO PURCHASE (OR DOWNLOAD FREE) SOFTWARE NOT LICENSED BY THE UNIVERSITY**; see section 4.2 above. Please keep in mind that this includes any software that your client and advisor advise that you use. Pre-approval can be acquired by emailing Stefanie Vanhorn at srv@andrew.cmu.edu and requesting use of software. Please include the following information:

- Software Name, Direct link to software, Direct link to terms and conditions, 1-2 sentence statement explaining why and how you will be using the software

4.2.4 Video Conferencing

The Heinz College has several IP-based videoconference systems that can be reserved for meetings with project team clients. Reservations must be made at least two weeks in advance. To reserve the videoconference system, email Heinz-computing@andrew.cmu.edu with the date, time, room, project team name, name and phone number for the technical contact at the far end.

**Please reference the Video Conference Guidelines (Appendix 5)**

4.2.5 Equipment Lending

Project teams can reserve portable projectors and laptops for presentations. Email Heinz-computing@andrew.cmu.edu for reservations.

> *NOTE ABOUT REHEARSALS FOR FINAL PRESENTATIONS*: If the presentation involves a technical component, it is advisable to include the component in the final presentation rehearsals. Project teams can borrow a laptop and/or projector for rehearsal purposes. Follow the guidelines in step 4.6 below

4.2.6 Heinz Consulting Services

The Heinz Computing Services department is available for consultation on information technology related subjects. Email Heinz-computing@andrew.cmu.edu to setup an appointment.
***More information on Heinz College Instructional technology can be found here:
http://www.heinz.cmu.edu/computing-services/documentation/index.aspx

## 4.3 Copy Services

Photocopies will be charged directly to the team's budget. The team may want to consider using electronic whitepapers or CD media to lower the cost of printing. Students may also wish to use their CMU printing quota: http://www.cmu.edu/computing/clusters/printing/how-to/index.html.

FedEx Kinko's Copy Center on campus can assist with the order and charge fees directly to the project Oracle Account String. Use their website to place orders: http://www.cmu.edu/kinkos. Remember to consult with the FedEx/Kinko's associates about cost estimates and lead times for copying and binding reports.

## 4.4 Parking and Transportation

Pay-As-You-Park Reservations are available at the East Campus Garage. Contact the Parking Services Office with the requested date, at least 3 days in advance. Requests may be submitted electronically via e-mail to parking (reservations@andrew.cmu.edu) and payment may be made using the Oracle Account String. A special validation ticket will be created, which can be mailed to the visitor or provided during their visit. They must have the validation ticket to leave the garage. Remember to cancel any reservations if plans change. If the space is reserved and not used, the project account will still be charged for the space.

Alternatively, the project may purchase validation tickets for any number of hours. This may be a more cost-effective solution, but visitors will not be guaranteed a parking space. These tickets, once purchased, should be treated as cash. Read more here: http://www.cmu.edu/parking

**Please inform guests they are likely to be ticketed if they park in authorized spots without a parking pass.**

Rather than drive cars to campus, offer guests the following alternatives:

- Carnegie Museum parking lot
- PAT bus-28X provides transportation to and from the Pittsburgh airport.

## 4.5 Room Reservations

For all room reservation questions and policies please see Appendix 4.

Teams are responsible for securing their own rooms for project meetings and presentations. **Please adhere to the times requested!** It is likely that another presentation or meeting is scheduled immediately following, therefore remember to include clean-up and post-presentation discussion time, when estimating duration.

Please wait for an email confirmation from the room coordinator before a confirmation is sent to the team. During busy times, reservations may need to be modified. If this is necessary, the room coordinator will contact the team.

4.5.1 Reserving Project Rooms for Team Meetings and Midterm Presentation

Rooms **may be reserved by the team Project Manager only**. Plan accordingly- rooms can only be reserved a week in advance.

Please note the following:

- Rooms are for team project work only
- Rooms can only be reserved for 1.5 hours at a time
- Rooms not occupied within 15 minutes of the reservation start time are automatically cancelled
- Rooms are a shared space. Please clean up after the meeting
- Room reservations should follow reservation guidelines (Appendix 4)

Please reserve rooms through SpaceQuest/25 LIVE system: http://www.cmu.edu/hub/spacequest/index.html. For questions, please email hzrooms@andrew.cmu.edu. The Academic Coordinator will email you with date ranges for your midterm presentation.

Room reservations for midterm presentations may be made a month in advance. Please start working with your client right away to establish dates and times that work with both parties.

To ensure fluidity throughout the room reservation process, rooms must always and only be requested by the team's project manager. Rooms not requested by the project manager will be denied.

## 4.6 Travel

**Travel outside of Pittsburgh requires authorization from the Program Director or the Associate Dean.** Authorized travel expense receipts (from both within and outside of Pittsburgh), should be turned into the Program Coordinator along with the completed Student Reimbursement Form (section 5.0; exhibit 3). University guidelines must be adhered to for travel. Please refer to the following URL: **http://www.cmu.edu/finance/controller/bte/index.html**.

4.6.1 Vehicle Rental

Here is the agreement for Use of Vehicles Rented by University Faculty, Staff and Students for University Business:http://www.cmu.edu/finance/controller/bte/rental-vehicles-user.html Access to the University's Financial Responsibility Insurance Identification Card can be gained through the same site (click on "Access to the University's insurance card"). **See the academic coordinator prior to vehicle rental.**

### 4.7 University Telephones

**NOTE: University /project team telephones are not available for use until codes have been assigned. Please do not schedule any client meetings via telephone until codes have been received from academic coordinator.**

Teams should use telephones located in Hamburg Hall. Instructions on how to use these phones with your authorization and pin numbers are on the wall in each room in the A001 suite. **Please do not use personal mobile telephones for team projects-personal telephone charges will not be reimbursed.**

University telephones may be used for project-related calls ONLY. All telephone calls (local and long distance) will be charged to the project budget.

## 5. FISCAL MANAGEMENT

### 5.1 Budget

**Each capstone team has a budget of $750 to use. Every purchase made outside of CMU vendors must be approved by the ISM office before the purchase is made. No purchase will be reimbursed that has not been pre-approved by the ISM office. No catering purchases will be reimbursed unless pre-approved by ISM Office.**

5.1.1 Appointment of Financial Manager

Project teams will be held strictly to their budgets. The Faculty Advisor must appoint a Financial Manager for the team within the **first two weeks** of the project. The role of the Financial Manager is to ensure that the project stays within budget by making sure expenses are approved, tracking expenses, and limiting spending to ensure there are no cost overruns.

5.1.2 Charge String Account and Telephone Reports

The Financial Manager is in charge of keeping track of the teams spending. Only those expenses necessary to the project should be charged to the account. **Consulting services and/or outsourcing of data analysis may not be purchased.**

**Remember, purchases made from CMU Vendors, such as parking and transportation, printing and copying, etc. can be made directly using the Oracle Charge String provided. All purchases made outside of CMU must be purchased by a member of the team (preferably the teams financial manager), who must then follow the Out of Pocket Expenses section (see below) for reimbursement from the team's budget.**

5.1.3 Poster Day

Poster Day for Systems and Capstone teams will take place at the end of each semester. All capstone teams are required to participate in poster day, which is facilitated by Heinz Academic Services. Teams should make sure to leave room in their budget for a printed poster.

## 5.2 Purchases

**All purchases must be directly related to the success of your project and must be approved by the Faculty Advisor and ISM Office. Reimbursements take 4-6 weeks to be processed through the university systems. GIFTS FOR CLIENTS and/or THE TEAM ARE NOT PERMITTED.**

5.2.1 Use of the team ORACLE string

Once approved, purchases should be made by the team's Financial Manager, using one of the University's auxiliary services groups such as the University bookstore and University catering. These expenses will be applied directly to the team charge string and show on team account reports. Do not forget to account for these purchases when balancing the budget.

5.2.2 Out-of-Pocket Expenses

- *Student Reimbursement Form (exhibit 3)* A completed student reimbursement form (exhibit 3) is required to process all out-of-pocket (cash) expenses. The form must be accompanied by original receipts, list a valid account string and be signed by the team's faculty advisor. Completed forms should be submitted directly to the Program Coordinator. The team financial manager should not personally reimburse individuals for their expenses; each reimbursement must be submitted separately, under each purchaser's name. Questions? Contact Program Coordinator.

- *Original Receipts* If any out-of-pocket (cash) purchases are made be sure to retain the receipt. ORIGINAL receipts must accompany all reimbursement requests. If an original receipt is not submitted, the expense cannot be processed. The receipt should show an itemized list of all purchases, as well as show that the item was paid. Be sure to keep track of team receipts.

- *30-Day Rule* The University has a 30-Day Rule: All reimbursements must be processed within 30 days of the purchase. Failure to comply with this may result in additional fees, additional taxes or denial of the reimbursement.

- *Tangible purchases*- All purchased items must be returned to the ISM office within two weeks of the completions of the capstone project. Tangible purchases include, but are not limited to, art supplies, USB drives, CD's, etc.

5.2.3 Survey Incentives

**NOTE: Please contact the program director or academic coordinator for direction *BEFORE* purchasing any survey incentives.**

## 6. Final Presentation

Final presentations will take place during two pre-determined days during the final week of the semester. Student teams will be provided with two dates and one make-up date during which they should plan to hold their presentation. Each team will work with their advisor and client to pick a one hour time slot on one of the days. Time slots will be first come, first serve. Teams must inform the ISM office of their preferred date and time two weeks prior to the dates.

The dates and times for spring 2016 are**: Tuesday, May 9th and Wednesday, May 10th. The alternate date will be Thursday, May 11th.**

Timeslots:

7:50am-8:50am

9:00am-10:00am

10:10am-11:10am

(Continued on next page)

11:20am-12:20pm

12:30pm-1:30pm

1:40pm-2:40pm

2:50pm-3:50pm

4:00pm-5:00pm

5:10pm-6:10pm

Appendix 1: Sample Peer Evaluation Form

**Project Peer Evaluation Form**

Please evaluate yourself and your colleagues based on the criteria below. After each name (mark 'X' above your name) give a numerical value in the space below. Please provide any comments regarding your evaluation in the comment line under each name. The comments will be kept private and not shared with any of your team members.

**Evaluation scale: 1 = lowest 5 = highest**

1: very poor performance, unacceptable

2: less than acceptable performance

3: average performance

4: good, solid performance

5: exceptional performance

| Criteria | *Student 1* | *Student 2* | *Student 3* | *Student 4* | *Student 5* |
|---|---|---|---|---|---|
| **Do you feel that the student contributed to a fair share of the workload?** | | | | | |
| *Comment* | | | | | |
| **Did the student meet the deadlines set forth by the team?** | | | | | |
| *Comment* | | | | | |
| **Did the student attend team meetings and contribute effectively during team meetings?** | | | | | |
| *Comment* | | | | | |
| **Did the students resolve any conflicts in a professional manner?** | | | | | |
| *Comment* | | | | | |
| **Did the student help in keeping the budget to a minimum while following guidelines set forth by the administration?** | | | | | |
| *Comment* | | | | | |
| **Did the student communicate with the clients (if any) effectively and in a professional manner?** | | | | | |
| *Comment* | | | | | |
| **Did the student contribute in developing, maintaining, integrating and communicating project deliverables?** | | | | | |
| *Comment* | | | | | |
| **Will you work with this person again given an opportunity to do so? Please answer yes/no/maybe in this case.** | | | | | |
| *Comment* | | | | | |

Appendix 2: Sample Peer Evaluation Summary Form

| | | Self | Your cumulative | | | | Total team | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | **Student ID#** | Eval | Med | Low | High | Ave | Med | Low | High | Ave |
| 1 | ABILITY TO IDENTIFY AND STRUCTURE TASKS | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2 | ABILITY TO CARRY OUT TASKS | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 3 | ABILITY TO COMMUNICATE RESULTS CLEARLY | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 4 | ABILITY TO USE AND INTEGRATE RESULTS | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 5 | ABILITY TO ACCEPT RESPONSIBILITY | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 6 | COMMITMENT OF TIME TO THE PROJECT | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 7 | DEPENDABILITY | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 8 | PROFESSIONAL IN MANNER | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 9 | A TEAM SUPPORTER | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

## Appendix 3: MISM/MSISPM - STUDENT REIMBURSEMENT FORM

Please print clearly inside the boxes and complete the entire form in detail; you may write on the back of the form.

INSTRUCTIONS:

1. All information must be filled out completely before reimbursement can be processed.
2. Please fill out one form per person and then turn form and receipt(s) into Academic Coordinator.

NAME OF PROJECT TEAM: CHARGE STRING: Fill in full number

| |
|---|
| |

NAME & ADDRESS OF STUDENT WHO MADE PURCHASE (check will be sent to this address):

| |
|---|
| |
| |
| |
| |

ANDREW ID OF STUDENT WHO MADE PURCHASE: ANDREW ID of FINANCIAL MANAGER:

| |
|---|
| |

PRODUCT VENDOR NAME: DATE OF PURCHASE:

| |
|---|
| |

Is this an IT SERVICE or SOFTWARE purchase? NOTE: **Pre-approval is required**

YES ☐ (GO TO "A" BELOW) NO ☐ (GO TO "B" BELOW)

A. IF FOR IT/SOFTWARE RELATED SERVICE:

| | |
|---|---|
| 1. | Detailed description of PRODUCT and why it is needed for project: |
| 2. | What are the terms of the purchase (month, year)? |
| 3. | Are you collecting private data with product (personally-identifiable information)? |
| 4. | Who on the team will have access to the data/domain? |
| 5. | Will the data be destroyed at project end? If not, who will retain data/domain? |

B. IF FOR ANY OTHER SERVICE (SUPPLIES, PARKING, ETC.):

| |
|---|
| REASON FOR PURCHASE (Need: Who, What, When, Where, How many people attended, and Why): |
| |
| |
| |
| |

TOTAL AMOUNT OF REIMBURSEMENT:

$

ADVISOR'S APPROVAL (Required)

Advisor's Printed Name

Advisor's Signature

***Appendix 4: Room Reservation Guidelines***

# Capstone and Information Systems Projects

**PLEASE FOLLOW THE INSTRUCTIONS BELOW OR THE ROOM WILL BE DENIED**

**Request a Room** go to https://25live.collegenet.com/cmu/
**Room Requests** can only be made on a **monthly basis**. Rooms ***CANNOT*** be requested for the entire semester by a Capstone and/or Information Systems Project.
**Requestor** only one student designated to request rooms on your group's behalf.
**Event Name** use the following format when entering information into 25Live:

Course Number/Section/Professor's Last Name/Purpose
**Example:**
95-720/A/Lightman/Meeting

Keep in mind 8:00am – 9:00am is an option for meeting with your group prior to the start of classes.

Please allow 24 hours for a room request to be confirmed or denied. This does not include week end requests.

Please note …you may only book the room for a ***maximum of 90 minutes*** **– No exceptions**.
Only one room per group, per day.

*****Please use hzrooms@andrew.cmu.edu and not a personal email*****

# Appendix 5- Video Conference Guidelines

1. Contact Heinz Computing Services
   - Email heinz-computing@andrew.cmu.edu to let us know that you wish to set up a videoconference. Include the date and time of the event, the names of all the people in your group, and the approximate number of local audience members.
   - **Please contact us at least one week** (five work days) prior to the conference date, even if you are unsure of the exact details. Accommodations for requests less than one week in advance cannot be guaranteed.
2. Select a Room
   - Use SpaceQuest (25Live) https://25live.collegenet.com/cmu to schedule a room based on your needs and classroom availability. Include a 30-minute setup time if at all possible.
   - Rooms 2008, 1002, 2003, A301 are fully equipped with VC equipment, ample space for presenters and audience.
   - Rooms 1005, 1004, 1007, 1006, 2011 can be used with mobile VC unit. There is ample space for presenters and audience members.
   - Rooms 1107, 2108, and the Dean's Conference Room have limited space. Cameras in these rooms face away from the monitors, so you cannot stand in front of the monitors during a presentation.
   - Interview Rooms (A001) have very limited space. A001F is large enough for a few audience members.
   - Computer Lab (239) has ample space, but is not very suitable for VC.
3. Schedule a Test
   - Tests allow Heinz Computing staff to meet with members of your group to go over everything. If any remote participants are available, they can join in the test as well. It is preferable to use the room that the presentation will be in a day or two before the event.
   - Please bring the laptop that will be used during the videoconference to make sure settings are correct.

4. Send the BlueJeans invite to anyone who will be participating.
   - Heinz Computing will forward you an invite via email. The same invite can be used for the test.
   - The invite contains instructions for distant participants to connect via computer browser (Internet Explorer, Firefox, Safari), videoconference unit (H.323), or mobile app (Android, iOS). Attempting to connect using Chrome will download a stand-alone BlueJeans application.
   - It is highly recommended that you encourage distant participants to download the plugin and test their connection beforehand. They can do this by clicking the link http://bluejeans.com/111 at the bottom of the invite.
5. At the time of the videoconference
   - Please have someone in the room with the laptop you will be using 30 minutes before the start (if room booking permits.)
   - A member of the Heinz Computing staff will set up the equipment and start the connection approximately 15 minutes before the start. Distant participants often do not connect until right before or even after the start time.

A few things to remember when using the videoconference:

6. Content sharing is designed to share PowerPoint slides. If you choose to use the computer for a live demonstration (ex. in Excel or a website), the screen must be in Clone, Duplicate, or Mirror mode the entire time and PowerPoint Presentation View must be off.
7. Use ⊞ + P or ⌘ + F1 to switch to Clone, Duplicate, or Mirror modes.
8. The system will only accept computer output resolutions of 1280x768 or less.
9. VGA connections usually work better than HDMI. Try to use a laptop with a VGA connection. If you need an adapter, visit the Heinz Computing resource desk.
10. Video content can only be shared if uploaded to BlueJeans beforehand. Sharing videos from the computer or YouTube during the presentation results in poor video quality and video lag. It is recommended that any videos be sent to the participants to view on their own.
11. Clear your desktop of all open windows other than those you will need for the presentation.
12. Complete all edits to your presentation ahead of time so the tech can work on connecting your laptop during the setup time.
13. Email the presentation to distant participants and distribute printed copies to audience members so they can follow along in the event there is an issue.