

HOW DEPARTMENT STAFF ASSIGNS A DEPARTMENT CLASSROOM TO A COURSE IN 25LIVE

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REVISION HISTORY

Version	Date	Name	Description
1	Oct 2015	Heather Edberg	Initial procedures
2	Aug 2016	David Gilbert	Transferred procedures to current approved procedures template
3	8/9/17	Margaret Stewart	Updated to show vCal does appear automatically. Also re-formatted so all appears uniform

PROPOSED TRAINING METHODOLOGY AND DELIVERY

The in-person format of training will allow the user to ask questions, hear an explanation for why the procedures were written a certain way, receive tips and avoid pitfalls, and hear others' questions in the group. In-person training allows a broader narrative of the background, context, and explanation to be shared by the trainer.

INTRODUCTION AND PURPOSE

To provide procedure for a department scheduling contact to schedule a department classroom for their course in 25Live.

RELATED POLICIES, REGULATIONS, GUIDING PRINCIPLES, AND COMMON PRACTICES

Along with the adoption of Banner as the Student Information System that will be used campus wide, the Office of the Registrar/Academic Scheduling will be implementing 25Live as the classroom scheduling software that interfaces with Banner. All course information with the exception of classroom assignments will be entered in Banner. Classroom assignments (via scheduling algorithm Scheduler 25 and manual scheduling) will be made in 25Live and put in the course sections in Banner via a transactional process.

Academic Scheduling, once scheduling procedures in 25Live have been mastered and documented, is charged with providing 25Live scheduling training to the scheduling contacts in the academic departments.

IMPACTED DEPARTMENTS, UNITS, PROGRAMS, AND CENTERS

1. Academic Departments
2. Office of the Registrar – Academic Scheduling

BEFORE YOU BEGIN

If this is the first time you are reviewing this procedure, open 25Live – Test ([https://25live.collegenet.com/ucrt/#home_my25live\[0\]](https://25live.collegenet.com/ucrt/#home_my25live[0])) to follow along.

FORMS

Classroom search and scheduling is performed in 25Live. There are no forms in 25Live.

Form	Form Name	Description
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PROCEDURES

1. Preparation in 25Live.
 - a. Before scheduling within a new term or year, verify that the academic cabinet has been created for the term of the course section in question.
 - b. Also confirm that the term cabinet contains a **Section** folder.

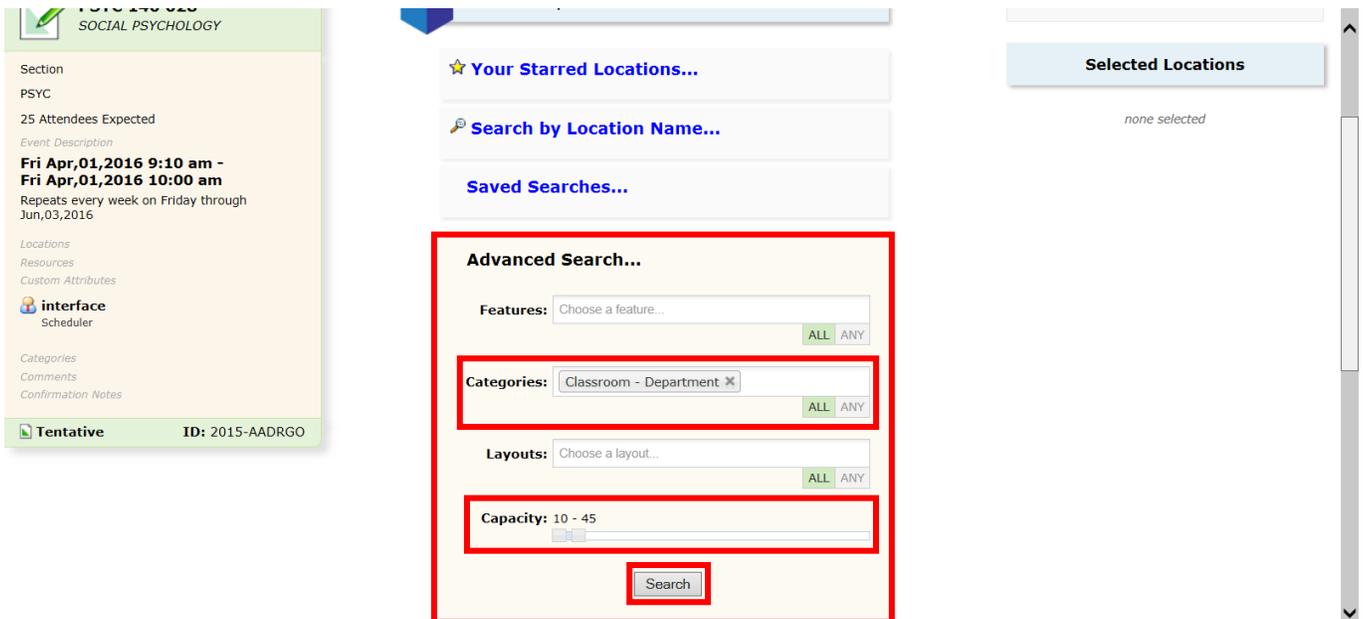
2. Locating desired course section.
 - a. Sign in to 25Live with your username and password.
 - b. Click: **Events** tab.
 - c. Verify you are on the **Search for Events** tab.
 - d. Click: **More Search Options** link.
 - e. Click: **Cabinet pull-down menu** and select desired **Term** (not a spot-scheduling cabinet).
 - f. Click: **Edit** link besides the **Types** heading. Select **Section** and click the **Done** button.
 - g. Click: **Edit** link besides the **Organizations** heading. Select course’s department and click the **Done** button.
 - h. Click: **Go** button.
 - i. Output will appear below the search criteria options. For this procedure, it’s recommended to use the **List** layout.
 - j. Screen should appear similar to the following:

The screenshot shows the 25Live search interface. At the top, there is a search bar with the text "Search by Keyword: Enter a Search Term..." and a "GO" button. Below the search bar, there are several filter sections: "Cabinet:" with a dropdown menu set to "2016 Spring"; "Types" with a dropdown menu set to "Section" and an "EDIT" link; "Organizations" with a dropdown menu set to "PSYC" and an "EDIT" link; "Categories" with an "EDIT" link; "Your Role:" with a dropdown menu; and "States" with an "EDIT" link. There are also "GO" and "START OVER" buttons. Below the filters, there is a "List" button and a "Calendar" button. At the bottom of the search interface, there are links for "Dates: Current and Future Dates", "Choose Visible Columns", "Send to Publisher", "Save Search", and "Refresh".

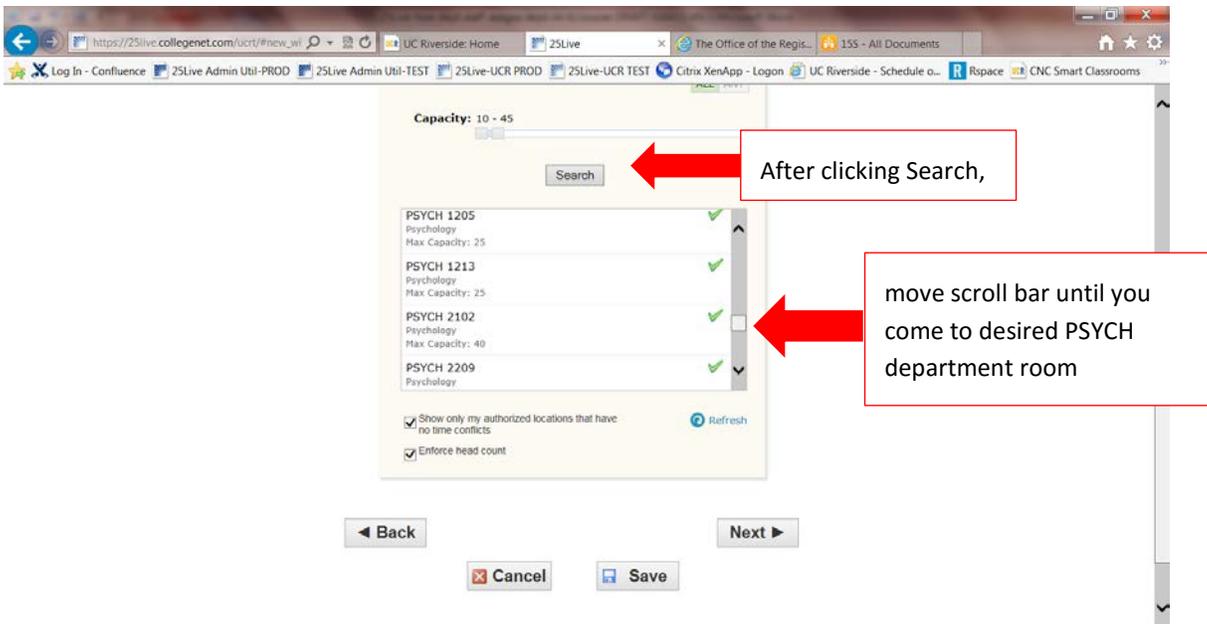
	Name	Title	Reference	Organizations	Type	Categories	Your Role	Start Date	Creation Date	State	Locations
	PSYC 001 001	INTRODUCTORY PSYCHOLOGY	2015-AADRPB	PSYC	Section			Mar,29,2016	Mar,03,2015	Tentative	
	PSYC 001 021	INTRODUCTORY PSYCHOLOGY	2015-AADRPC	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 022	INTRODUCTORY PSYCHOLOGY	2015-AADRPD	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 023	INTRODUCTORY PSYCHOLOGY	2015-AADRPE	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 024	INTRODUCTORY PSYCHOLOGY	2015-AADRPF	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 025	INTRODUCTORY PSYCHOLOGY	2015-AADRPG	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 026	INTRODUCTORY PSYCHOLOGY	2015-AADRPH	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 027	INTRODUCTORY PSYCHOLOGY	2015-AADRPI	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	
	PSYC 001 028	INTRODUCTORY PSYCHOLOGY	2015-AADRPI	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative	

3. Scheduling a department room for a course section using Advanced Search.
 - a. In this example, course section is **PSYC 140 028** with an expected head count of **25**, and desired room is a department room in the Psychology (PSYCH) building.
 - b. Click: desired course section in **Name** column.

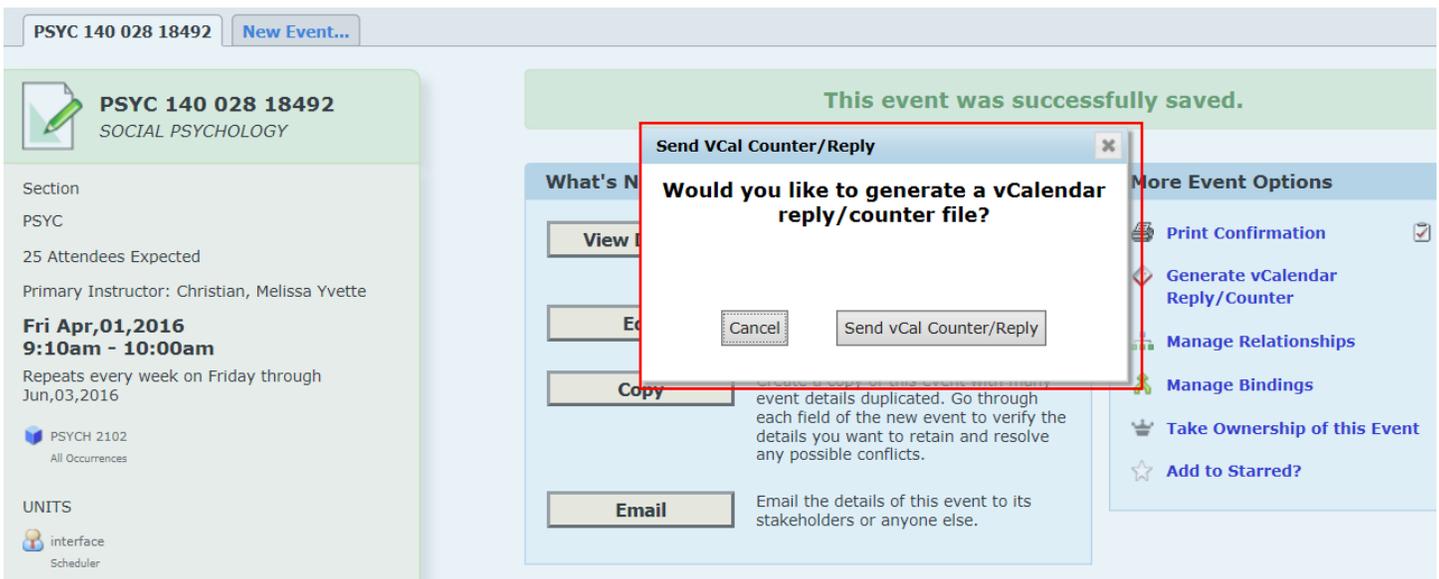
- c. Verify you are on the **Details** tab (click tab if not).
- d. Click: **Edit This Event**. You will be taken to the **Event Wizard**.
- e. Click: Next button until you reach the **Add, Remove, or Edit Locations** section.
 - i. You can also click the **Locations** link on the navigation bar on the left side of the screen.
- f. Click: **Advanced Search**.
 - i. **Note: Advanced Search** was used to ensure only department classrooms come up.
- g. Click: **Categories** box and select **Classroom – Department**.
- h. Slide: **Capacity** mechanism until it includes at least the expected head count (making it slightly higher will increase room options in output).
- i. Click: **Search**.
- j. Screen should appear similar to the following:



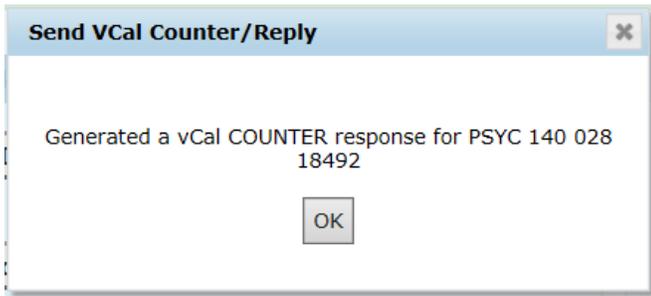
- k. From classroom output, click on desired classroom (should have a **green check mark indicating availability**).
- l. Screen should appear similar to the following:



- m. Verify selected room appears with **event details** at left side of screen and under **Selected Locations** at top right of the screen.
- n. Click on the **Contacts** link in the navigation bar on left side of screen.
 - i. Enter the name(s) of the **Requestor** and **Scheduler** of the section.
- o. If you have notes to convey additional information about scheduling of the section and/or room, click on the **Comments** link in the navigation bar and enter text only in the **Comments** box.
- p. Click on the **Event State** link in navigation bar on left side of screen (**Event State** should read **Tentative**, the default state of sections imported from Banner).
 - i. Update the state to **Confirmed**, if desired.
 - ii. **Tentative** state will book the room as well.
 - iii. You can still edit the event even if the state is **Confirmed**.
- q. **Save**. Screen should appear similar to the following:



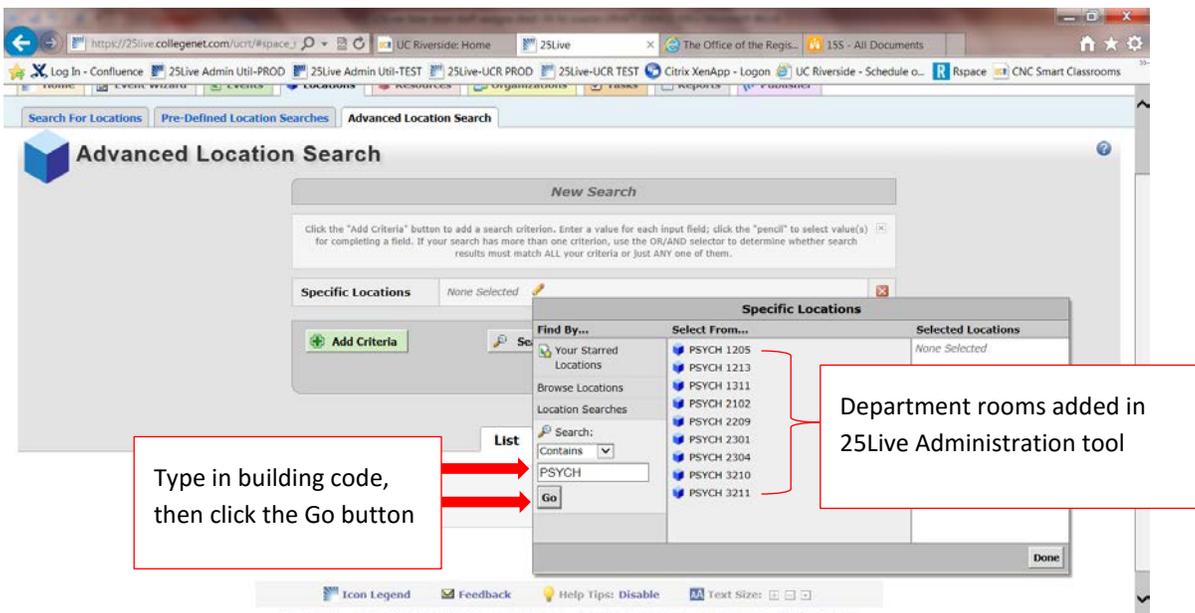
- r. To send room assignment back to Banner, click button **“Send vCal Counter/Reply,”**
- s. The following box will pop up; click **OK:**



- t. Room assignment should appear on section in Banner within 3-5 minutes after clicking OK.

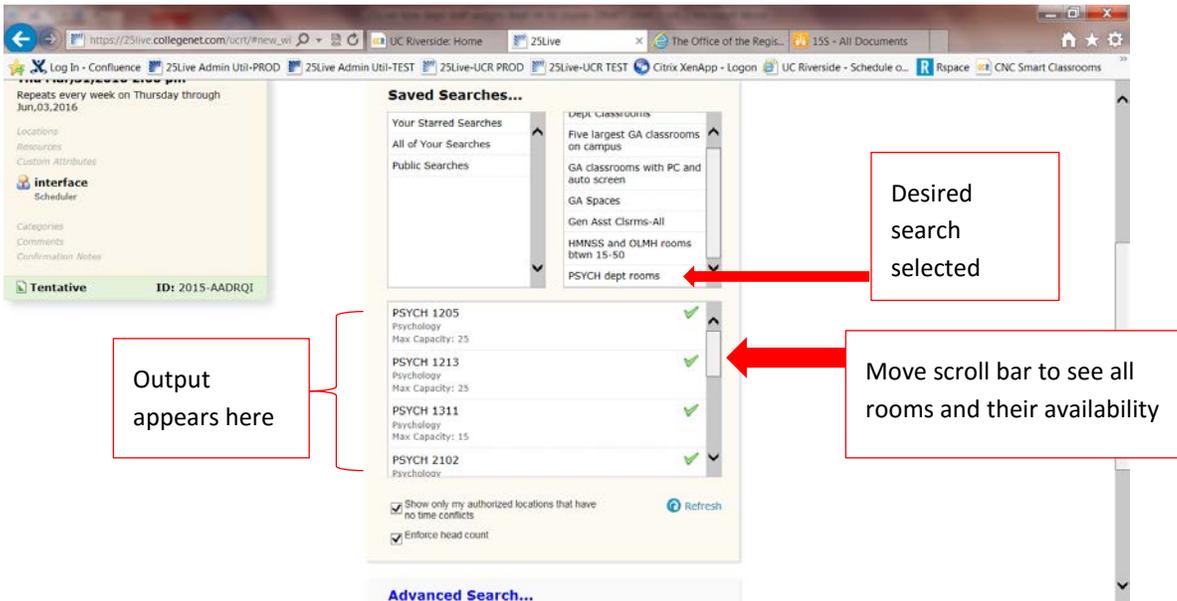
4. Creating a customized room search

- a. You can also create a search that will pull up specific department rooms. In this example, we’ll create a search to find all departments rooms in the Psychology (PSYCH) building.
- b. From the **Home Dashboard**, click on the **Locations** tab.
- c. Click: **Advanced Location Search** tab.
- d. Click: **New Search** button.
- e. Click: **Add Criteria** button.
- f. In pop-up box, select **Locations**, then **Specific Locations**.
- g. Click: **pencil beside None Selected**.
- h. Use one of the search criteria in the **Specific Locations** pop-up box to find and select the PSYCH department classrooms.
- i. Screen should appear similar to the following:



- j. Click on each room you want to be part of the search, then click **Done**.
- k. Click: **Save** button.
- l. The **Enter Search Name** pop-up box appears. Type in a name for the search and **Save**.
- m. Click: **Back** button to exit search creation section.

5. Scheduling a department room for a course using a customized search
 - a. Follow process outlined above in **section 3, steps a through e.**
 - b. At **“Add, edit, or remove locations,”** click **Saved Searches.**
 - c. Click: **All of Your Searches.**
 - d. Move scroll bar of box on right side until you find the desired search.
 - e. Output will appear similar to the following:



- f. Click on desired search.
- g. From search output, click on desired room.
- h. Resume room scheduling process outlined above in **section 3, steps m through t.**