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] to follow along.

FORMS

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

Name Description

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 <u>Section</u> 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:

	_		Sea	arch by Keyw	ord: Enter a Sear	ch Term	XG	O Fewer Sea	rch Options				~
			Cabinet: 2016 Spring	~		Ca	ategories 🗉	DIT					1
			Types			Ye	our Role:	~					1
			Section			St	ates EDIT						
			Organizations PSYC EDIT					GO	START OVER	1			
					List	Caler	ndar						
				Da	tes: Current and Eut	ture Dates	Choose Visible	e Columns 🔽	(Its Send to Pu	hlisher 🗔 Save	Search 💽	Refresh 🙆	
		••		Deferrer er		T		New Dela	() being to Fu				
	~~	Name			Organizations	Section	Categories	Your Role	Mar 20 2016	Mar 02 2015	Tentative	Locations	
	کت ۸			2015-MADRED	PSIC	Cention			Mar 20 2010	Mar,03,2015	Tentative		
	23	SYC 001 021	INTRODUCTORY PSYCHOLOGY	2015-AADRPC	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
	公	SYC 001 022	INTRODUCTORY PSYCHOLOGY	2015-AADRPD	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
2	☆	SYC 001 023	INTRODUCTORY PSYCHOLOGY	2015-AADRPE	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
1	☆	SYC 001 024	INTRODUCTORY PSYCHOLOGY	2015-AADRPF	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
2	☆	SYC 001 025	INTRODUCTORY PSYCHOLOGY	2015-AADRPG	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
2	$\stackrel{\wedge}{\simeq}$	SYC 001 026	INTRODUCTORY PSYCHOLOGY	2015-AADRPH	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
2	☆	SYC 001 027	INTRODUCTORY PSYCHOLOGY	2015-AADRPI	PSYC	Section			Mar,28,2016	Mar,03,2015	Tentative		
2	$\stackrel{\wedge}{\boxtimes}$	SYC 001 028	INTRODUCTORY PSYCHOLOGY	2015-AADRPJ	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:

on	Your Starred Locations	Selected Locations
ttendees Expected	✤ Search by Location Name	none selected
Apr,01,2016 9:10 am - Apr,01,2016 10:00 am ats every week on Friday through 03,2016	Saved Searches	
ions	Advanced Search	
urces	Advanced Search	
nterface cheduler	Features: Choose a feature	
tories		
nents	Categories: Classroom - Department ×	
rmation Notes	ALL ANY	
ID: 2015-AADRGO	Characterized and	
	ALL ANY	
	Capacity: 10 - 45	

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

Capacity: 10 - 45	After c	licking Search	ĺ
PSYCH 1205 Psychology Max Capacity: 25			
PSYCH 1213 Psychology Max Capacity: 25	~	move scroll ba	r until you
PSYCH 2102 Psychology Max Cepacity: 40	× •	come to desire	ed PSYCH
PSYCH 2209 Psychology	¥ ¥	department ro	om
Show only my authorized locations that have no time conflicts	Refresh		
< Back	Next ►		

- 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 <u>only</u> 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:

PSYC 140 028 18492 New Event	
PSYC 140 028 18492 SOCIAL PSYCHOLOGY	This event was successfully saved.
Section PSYC	What's N Would you like to generate a vCalendar reply/counter file? Nore Event Options View View Print Confirmation Image: Confirmation image: Confirmatimage: Confirmation image: Confirmatimage: Confirmatim
25 Attendees Expected Primary Instructor: Christian, Melissa Yvette Fri Apr,01,2016	Generate vCalendar Reply/Counter Cancel Send vCal Counter/Reply
9:10am - 10:00am Repeats every week on Friday through Jun,03,2016	Copy event details duplicated. Go through each field of the new event to verify the
PSYCH 2102 All Occurrences	details you want to retain and resolve any possible conflicts. Take Ownership of this Event Email the details of this event to its Add to Starred?
Scheduler	Email stakeholders or anyone else.

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

Send VCal Counter/Reply	×
Generated a vCal COUNTER response for PSYC 140 02 18492	8
UK	

- 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:

For Locations Pre-Defined Locatio	n Searches Advanced Loca	ation Search				~
Advanced Location	on Search					0
			New Search			
	Click the "Add Criteria" but for completing a field. If	ton to add a search crit your search has more t results must mai	terion. Enter a value for ea than one criterion, use the tch ALL your criteria or jus	ch input field; click the "pencil" t OR/AND selector to determine # t ANY one of them.	o select value(s) 📧 thether search	
	Specific Locations	None Selected	1		8	
			Specific Locations			
	🛞 Add Criteria	🔑 Se	Find By	Select From	Selected Loc None Selected	d
			Locations	PSYCH 1213		
			Browse Locations	PSYCH 1311 PSYCH 2102	Donartmont r	rooms added in
			Location Searches	SYCH 2209		
		List	Contains V	PSYCH 2301	25Live Admin	istration tool
Type in bui	lding code,	\rightarrow	PSYCH	95YCH 3210		
فبامثام مرمطة	he Go button	\rightarrow	Go	V PSYCH 3211		

- j. Click on each room you want to be part of the search, then click Done.
- k. Click: Save button.
- I. 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.
 - Click: All of Your Searches. c.
 - d. Move scroll bar of box on right side until you find the desired search.
 - Output will appear similar to the following: e.



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