25Live Scheduling System, Version 24 Reference Guide to School Schedulers

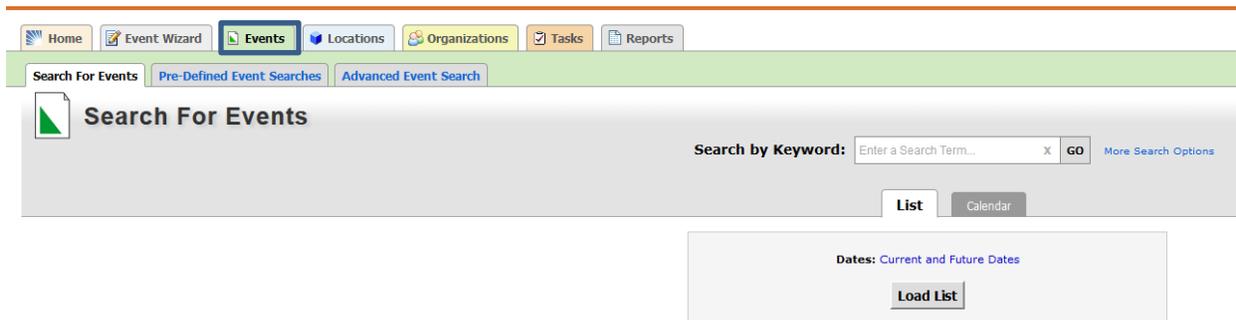Website: https://25Live.collegenet.com/miami

Login: UM credentials

Notice that the Home Page has not changed.

Searching for Events:

Click on the Events tab

Notice that the Search for Events tab becomes active. At this point, you could look for just one event (by typing the name of the event in the Search by Keyword box) or create a search that contains all of the academic events been offered by your school for a specific term (by adding searching criteria)

1. **Searching for a specific event:** following the breadcrumb: Events>Search for Events Tab, type name of the event in the Search by Keyword box. See sample below:

Results after clicking on the GO key:

You can also follow the instructions above to search for a non-academic event. Let's search for any events created in the system that contain the word "meeting" in the event name as an example:

After clicking on the GO key, results of the search will show:


2. **Searching for all events under the same category (or academic term):** As with the old version, remove any information you may have in the Search by Keyword field, click on the link that reads More Search Options and proceed editing by *Organizations* (academic departments), *Category* (academic term) and Event *States* (if needed).

Click on the EDIT key by *Organizations:*

Select department(s) by typing the three letter abbreviation (i.e., MTH, ACC, PTS, etc.) that defines it in the box showing under the Find By column as showing below:
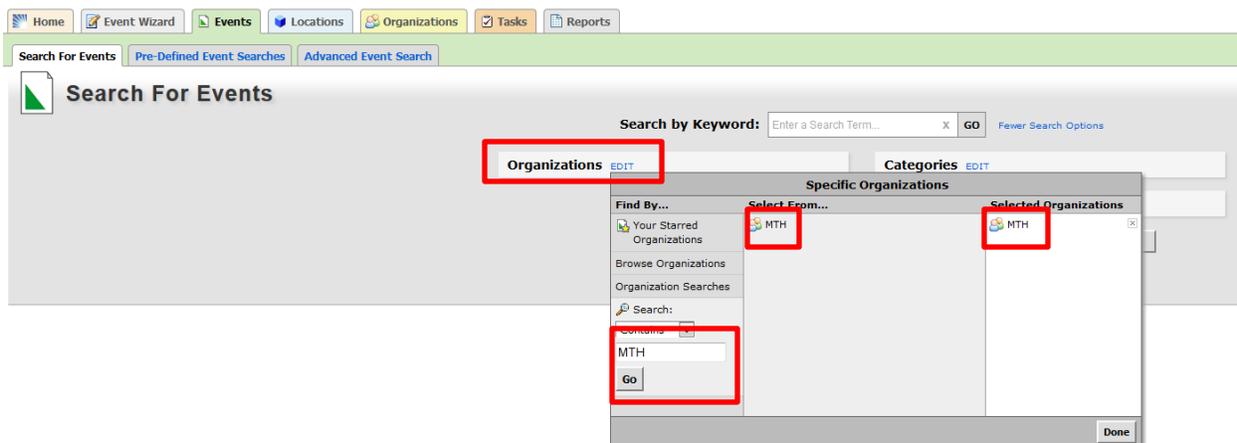
Make sure to select your choice by clicking the three letter abbreviation for your department's name. Verify that it shows under the Selected Organizations column. Repeat these steps until you have selected all departments you want to show/save on your search. When finished, click on the DONE key.
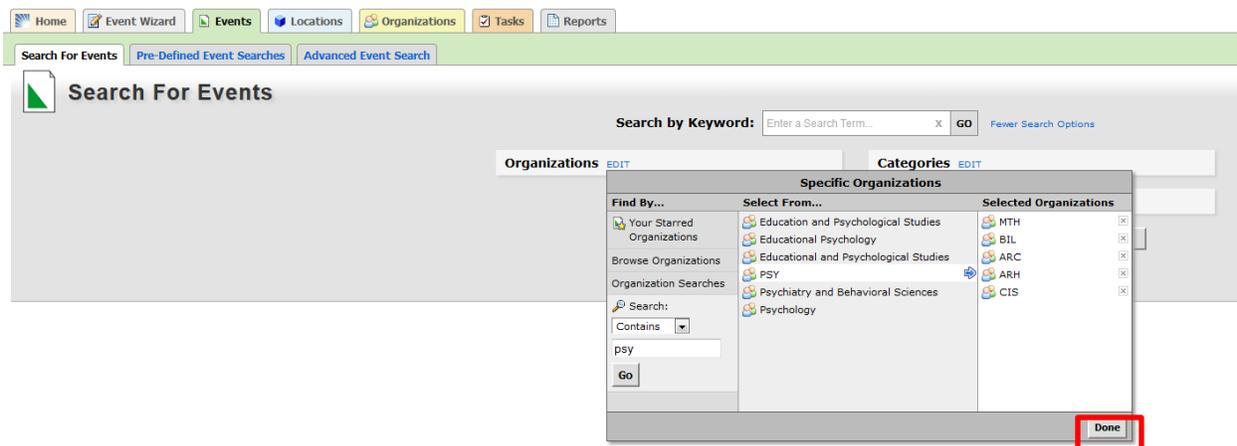
Once you have selected the organization or list of organizations that belong to your school, proceed to click on the DONE key. Notice that all selected departments now show on Organizations – if you missed any organization, click the EDIT key and you will be able to add any missing departments and remove any departments added by mistake.

See sample below, adding the HIS department to the existing selection for the College of Arts and Sciences:
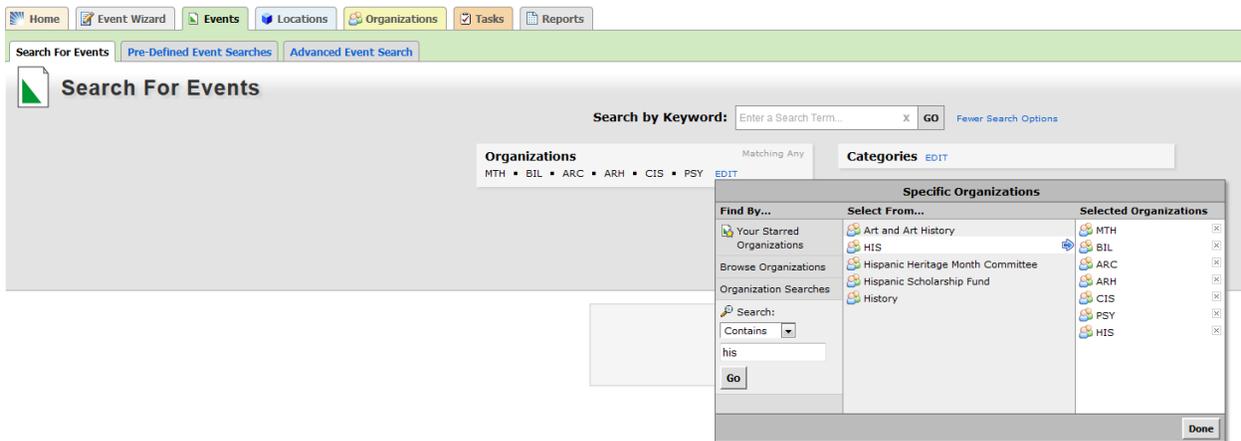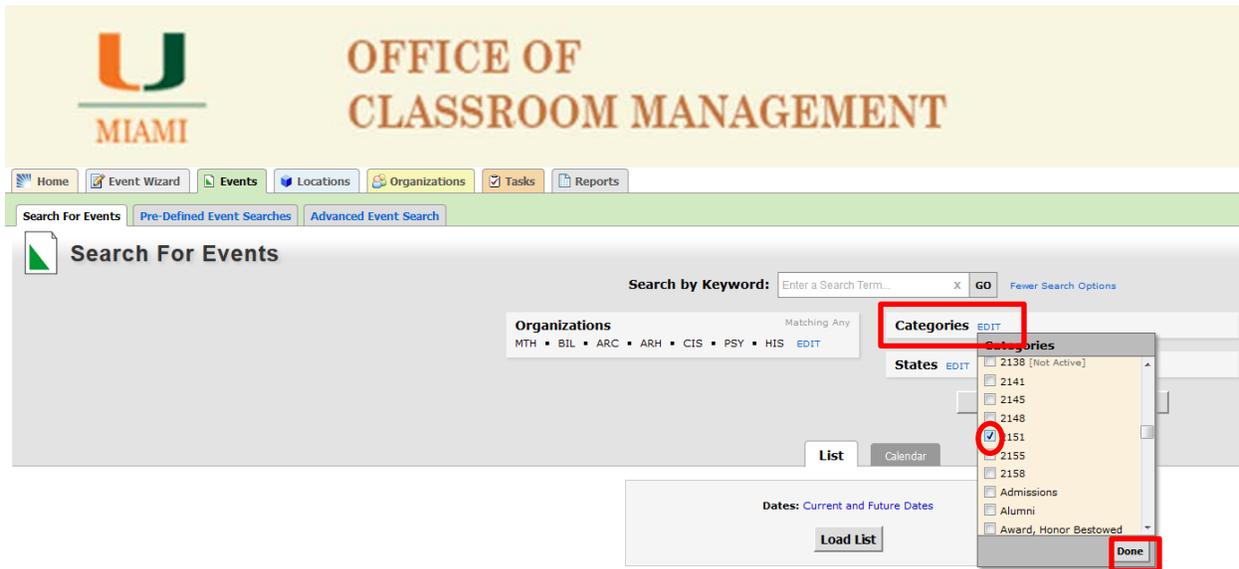

Click on the EDIT key for *Categories:*

Select the academic term you will like the system to show all courses entered for the term.
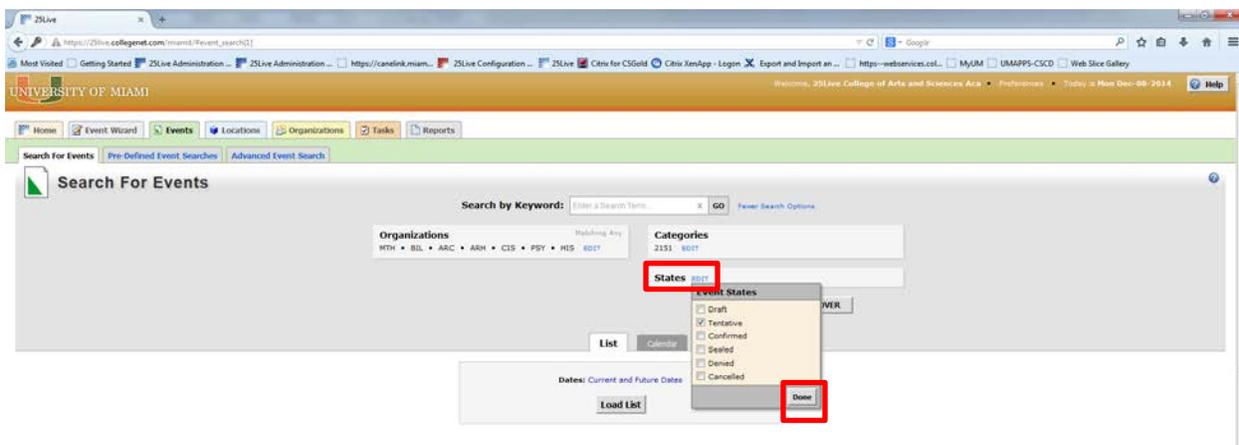
Click on the DONE key for the system to save your selection.

Sample below shows selection of 2151 CaneLink term for Spring 2015.

Click on the EDIT key to select the event's *States*:

The "Tentative" state selection will show you all active courses.

Click on the DONE key

Click on the GO key to get results of your search – See sample below:

Notice that you are able to save your event's search by clicking on the Save Search link located by the right-mid section ribbon.

Click on the Save Event link

A system message screen appears prompting you to select to save your search.

Select "Save Criteria"

Name your search and click on the Save Search key.

Notice that the search will be added to your "Starred Searches" for easy and fast access.

You will have access to your saved search(es) any time needed by just clicking on the Events tab and looking for the Your Starred Event Searches, in the Pre-Defined Event Searches or the Advanced Event Search tabs.

- ➢ To **check results** of your created/saved search, just click on the **RUN** key.
- ➢ To **modify your search**, click on the **EDIT** key.
- ➢ To **delete** your search, click on the **DELETE** key
- ➢ To **share** your search, click on the **SHARE** key – an email will be sent to the person/contact you shared your search with. This is a new feature. Sharing a search with another person is at the scheduler's discretion.

Adding a Location to an Academic Record:

To add a location to a record, click on the EDIT icon for such record as showing below:

As per new view of the Event Wizard with the 25Live version 24, the event will load and open from the Event Name page as showing below:
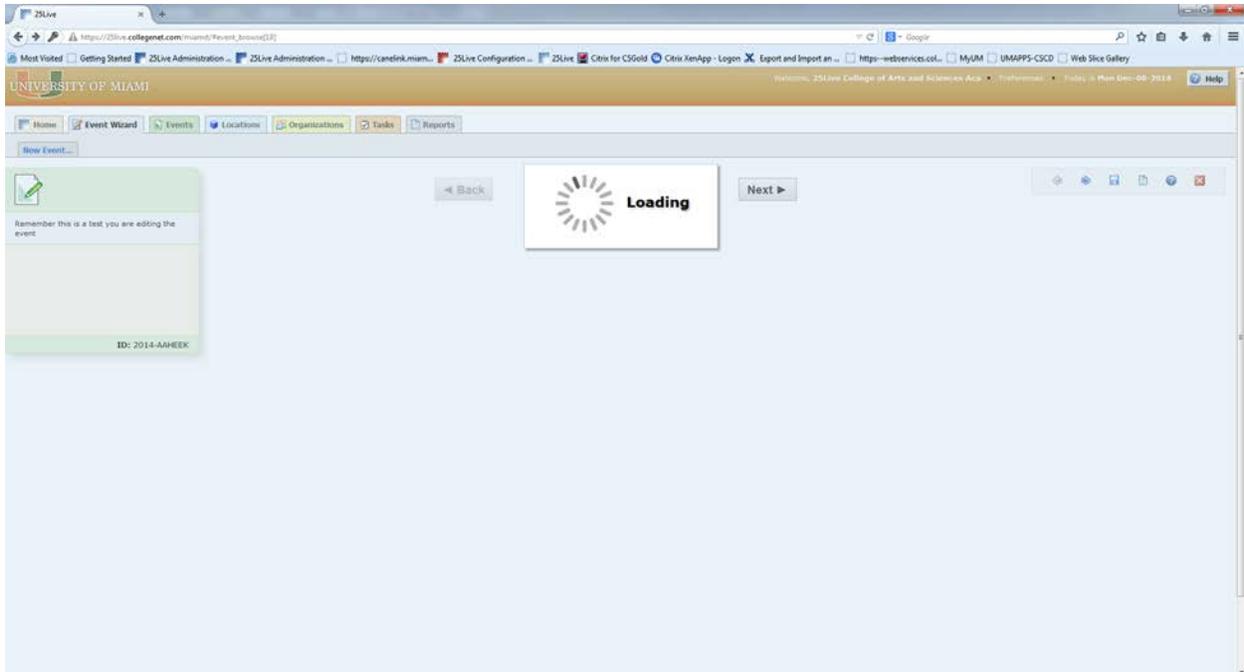
Click on the Location link
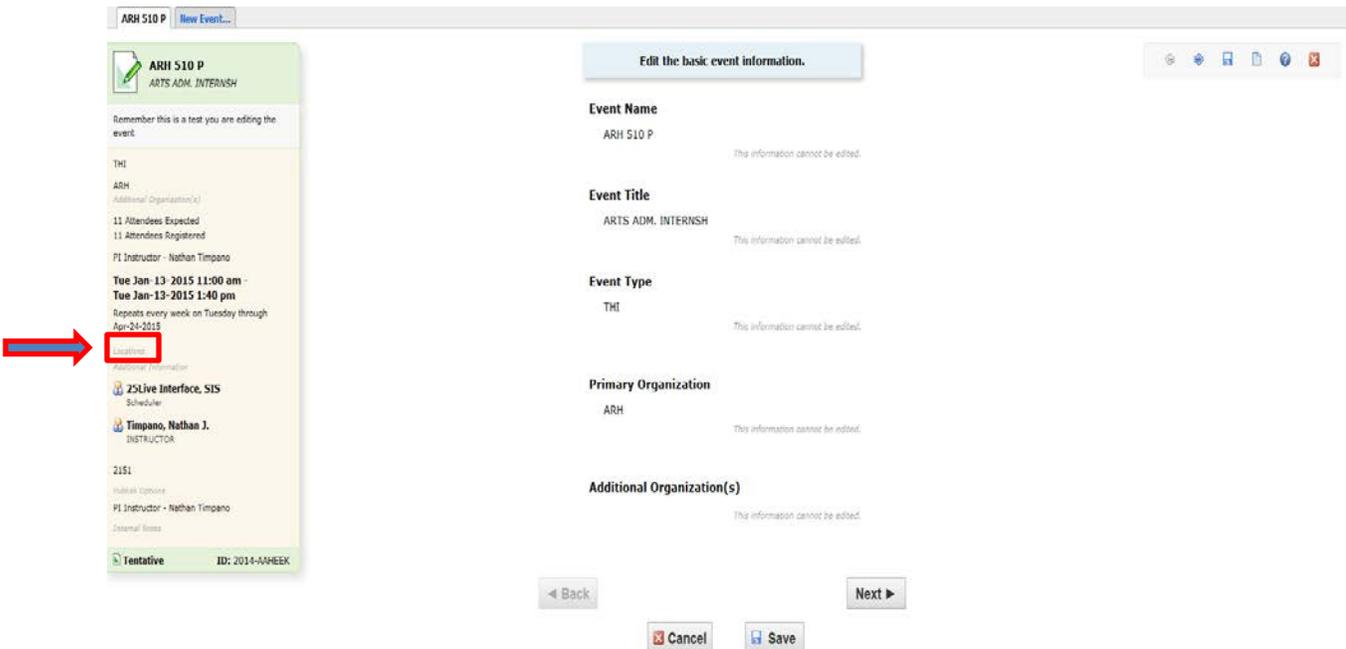
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The system will show the Location screen where you will be able to assign a location after using any of the available location search options listed in the center of the screen:
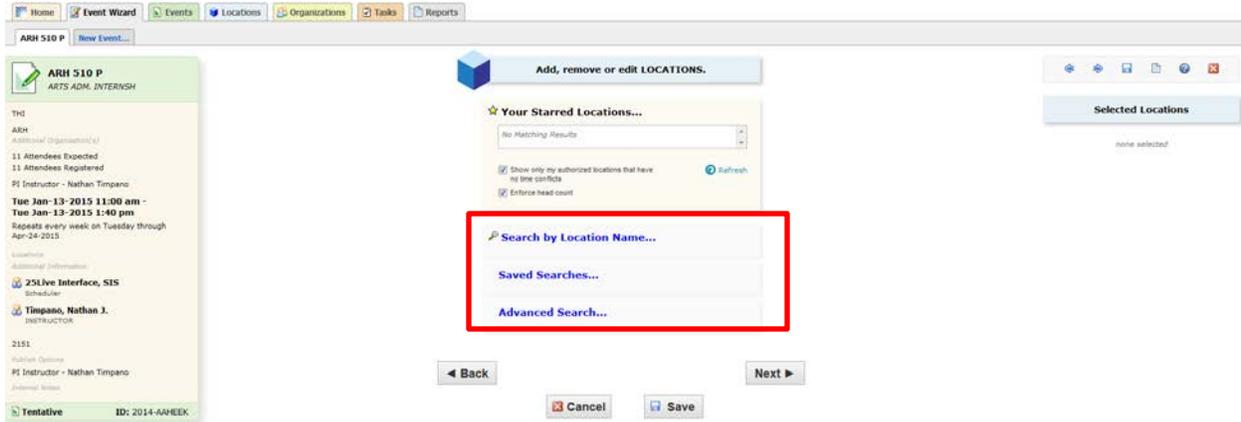
Search by Location Name allows schedulers to type in the building name as well as room number if a specific location is in mind for the academic record:
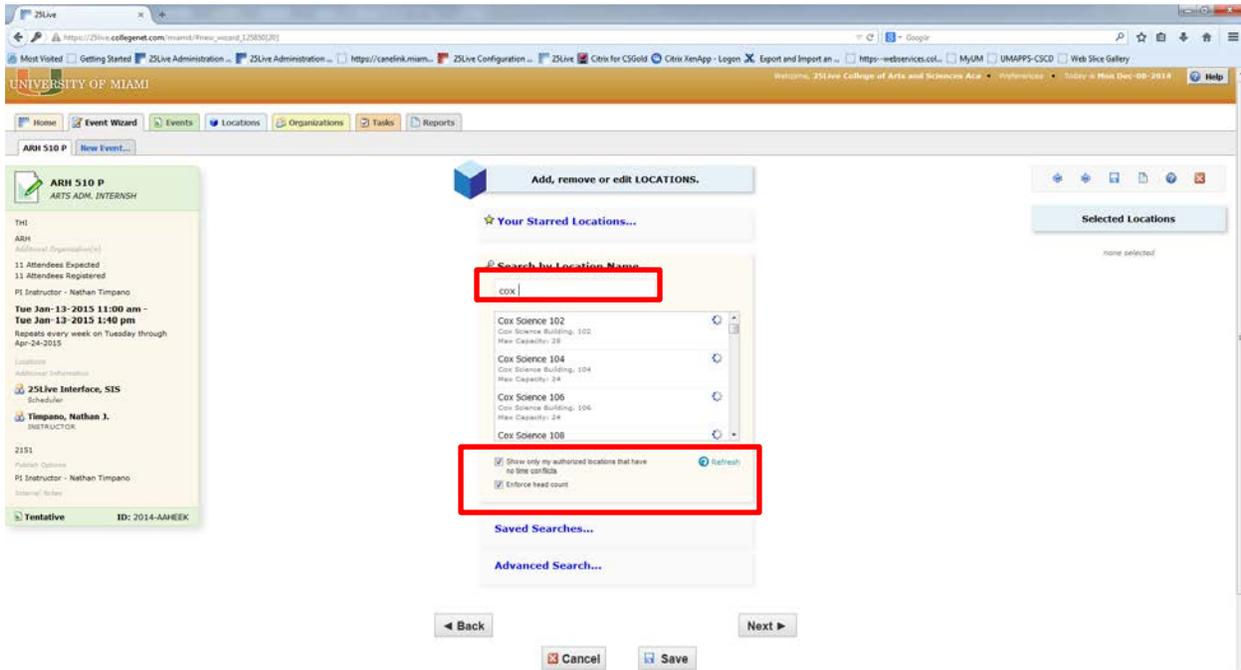
There are two checked boxes at the bottom of the Location screen:

    o   Show only my authorized locations that have no time conflicts

- o Enforce head count.

When both boxes are checked, the system will look for a location available within your school owned spaces and that is large enough to accommodate your class size. The Enforce head count box is one of the new features for release 24.

OCM highly recommends that both boxes are checked to avoid location conflicts. Only unclick boxes if you wish to investigate what is event occupying a specific location.

If you thought that a specific location was available but it did not show on your search, unclick the Show only my authorized locations that have no time conflicts box:

- o A green check mark by a location means that space is available for your record – you are welcome to select such location and click on SAVE.
- o A red triangle icon showing by a location means that space is already occupied with another event at date(s)/time-slot you want to assign space for your record. You can hover over the red icon to see what event is conflicting with your record.
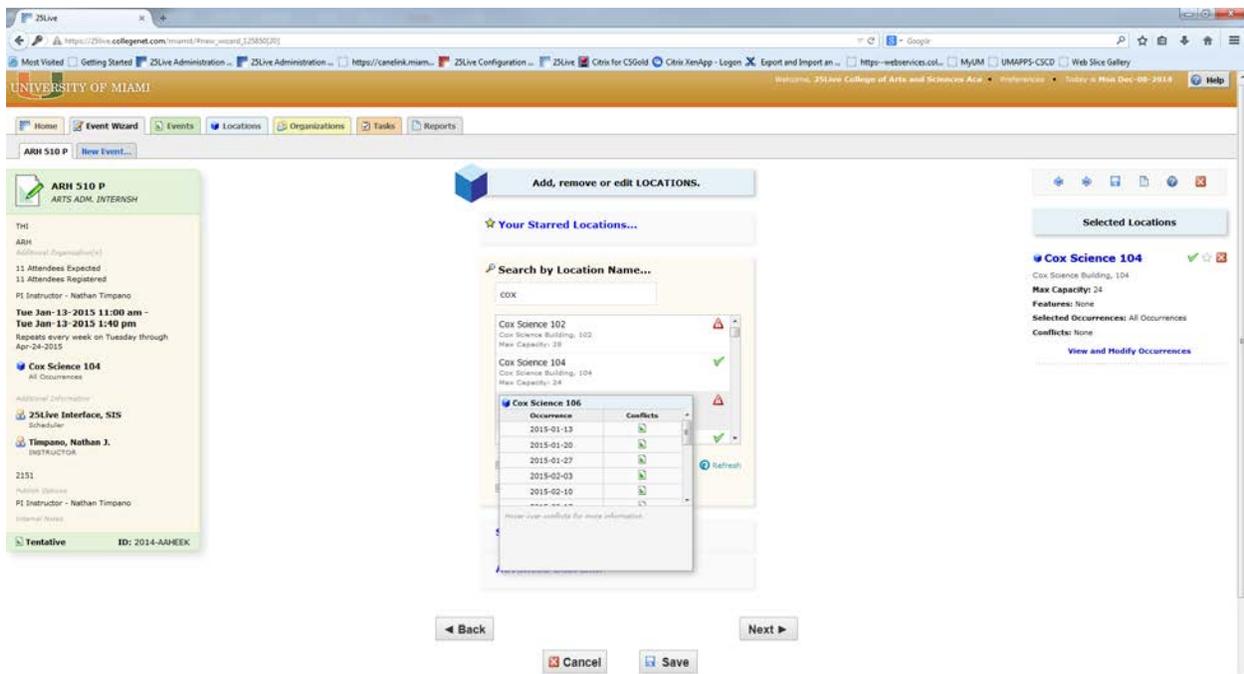
Once you select a location to be assigned to your record, the location will show at the right upper corner of the screen.

Click on the SAVE key to save your record with the selected location.

25Live System will provide for you, as one of the new enhancements, a processing status bar.

Once the academic record is saved, the system will show the below screen indicating that the event was saved successfully.

Close record by clicking on the red icon with a X at the top right upper corner of your screen.
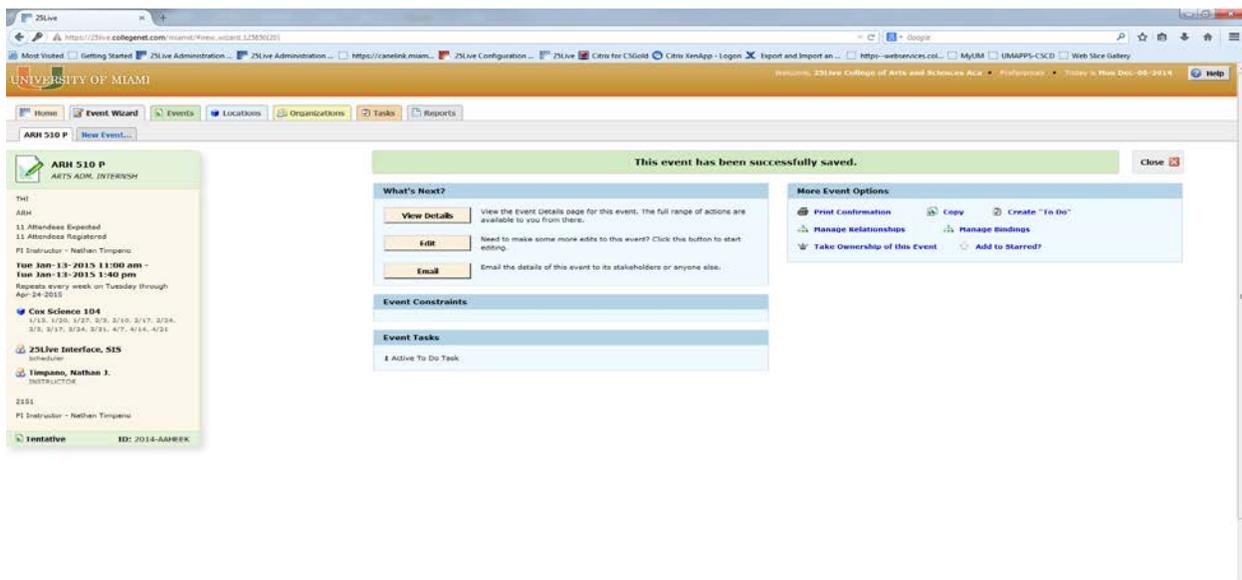
KEEP IN MIND THAT THE ONLY FIELD TO BE MODIFIED IN 25Live SCHEDULING SYSTEM FOR AN ACADEMIC RECORD (COURSE-SECTIONS) IS THE <u>LOCATION</u> FIELD. ALL OTHER CHANGES TO AN ACADEMIC RECORD NEED TO BE PROCESSED IN THE CANELINK SYSTEM.

Searching for a Location

Click on the Locations tab

Type in the building name and room number

Click on the Go key
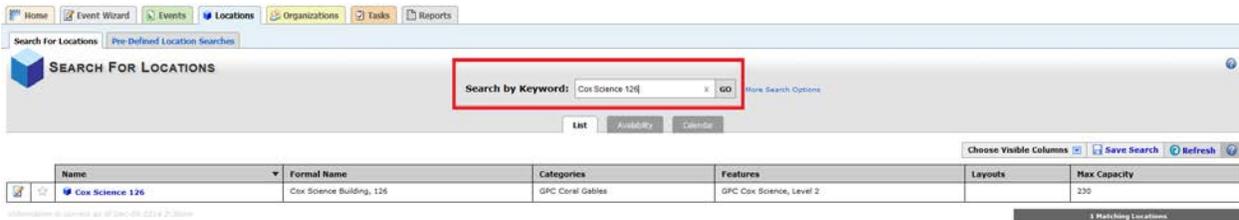
Searching for all locations in a building:

Just type in the building name only

Click on the Go key
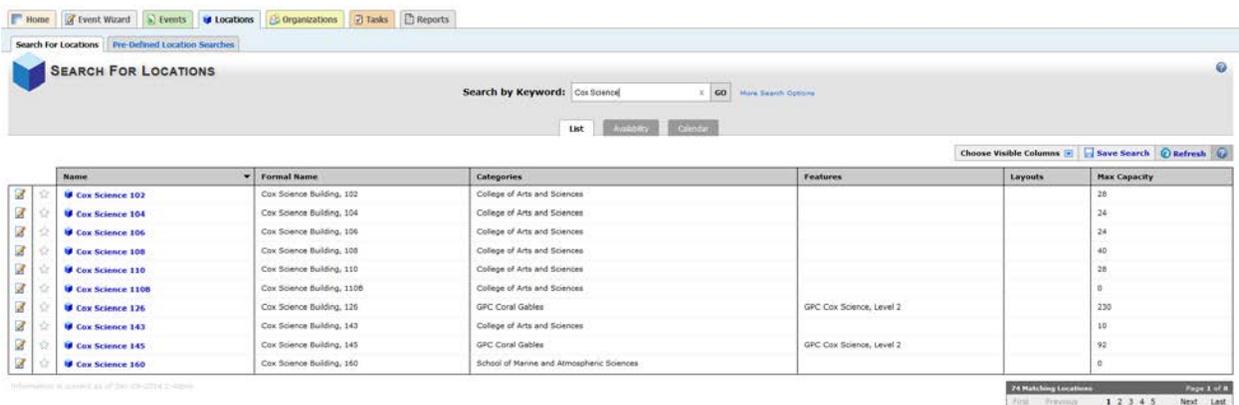
Use the numbers and the Next and Last keys at the bottom right corner of the screen to move from one page to another. Notice that the system found 74 matching locations for the building name.

Saving a Location Search:

You can save your search by clicking on the Save Search link **Save Search**

If you manage more than one building, you may want to create another search that contains all locations administered by your school.

To do this click on the X located in the Search by Keyword box to clear the location search

Click on the More Options link

Click on the EDIT link showing by Categories to select your College/School locations. Sample below shows selection for the College of Arts and Sciences locations

Click on the EDIT link showing by the Capacity title to select a capacity range.

Note: If you would like all of the spaces managed by your school listed and saved on this general search, just add a range that contains all of the school owned spaces. See same of settings below for the College of Arts and Sciences:
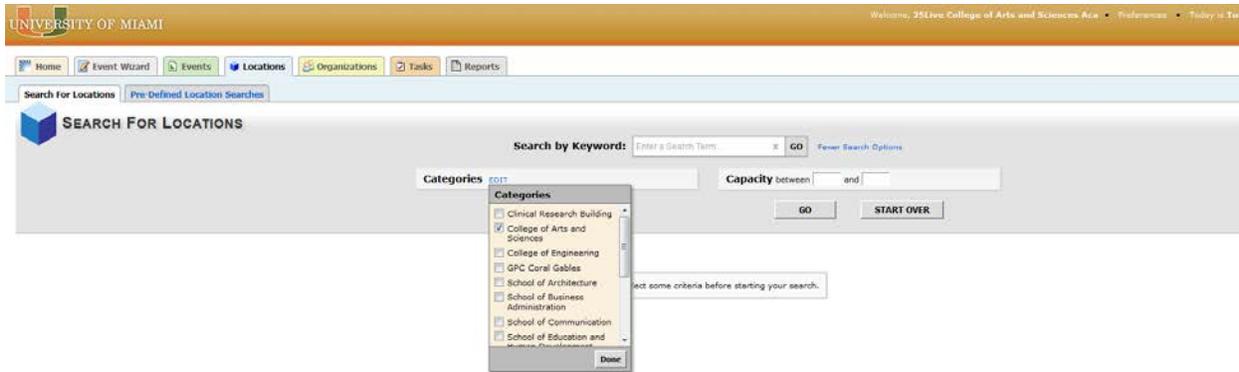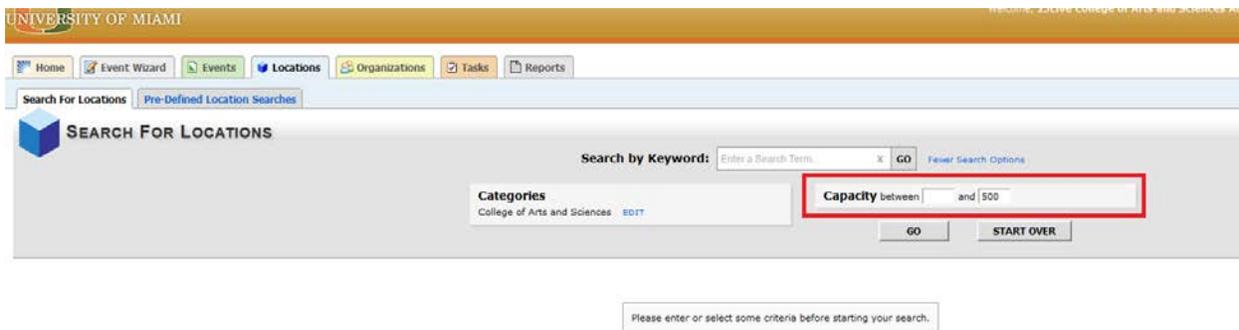

Notice the tree tabs at the bottom of the page. They allow the user to check spaces by listing them by showing space availability for a specific date or date range and a calendar view.

In this case, to just save a search that will contain all of the spaces managed by the college/school, select the "list" view.

Click on the Go key after all settings have been added.

See and review the search results

Proceed to save your Location Search results by clicking on the Save Search link

Creating a Non-Academic/Special Event in the 25Live Scheduling System:

Non-academic events are all events not considered a course-section from an academic term. Within those records you may schedule: class discussions and/or reviews, departmental meetings, movie screenings and other events that requestors may want to schedule in your school spaces.

To create a non-academic or special event and assign it to one of your school/departmental locations, follow below steps:

Click on the **Event Wizard** tab
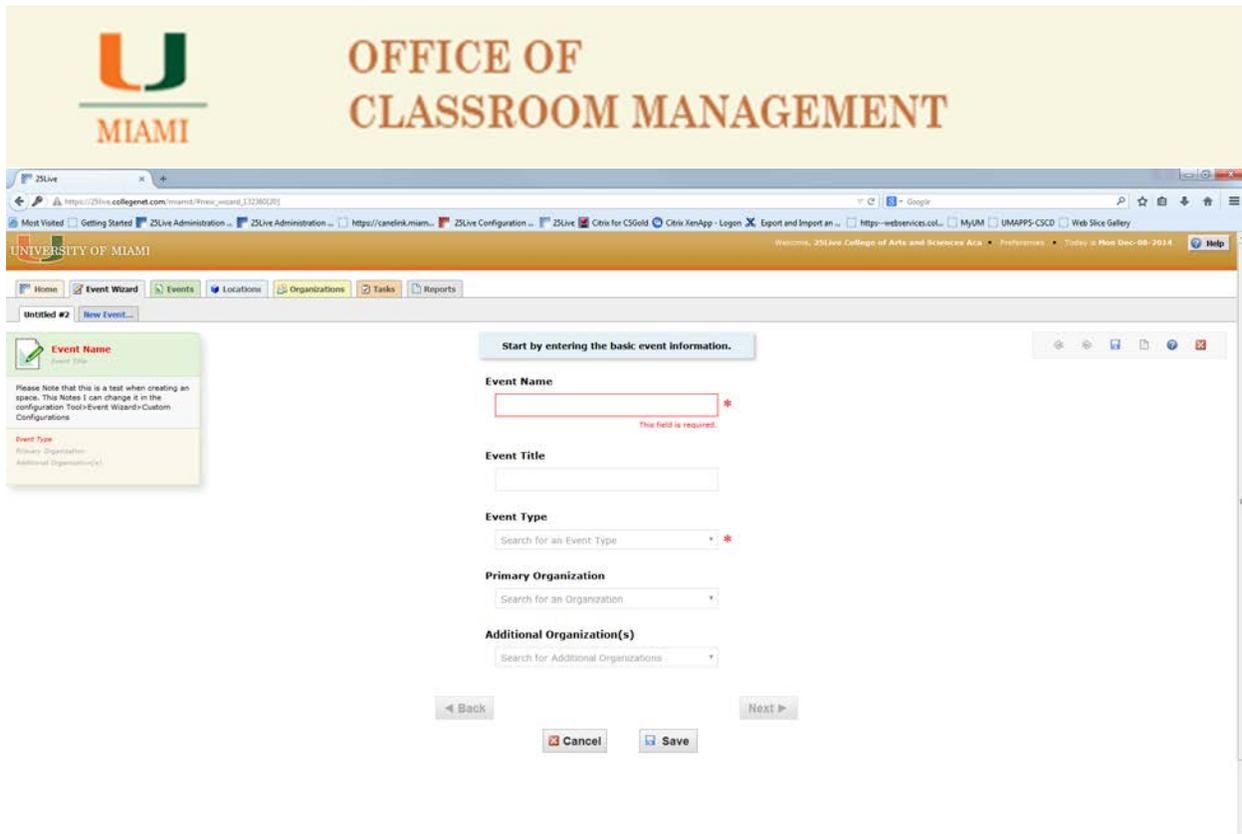
Important:

Type in requested information in the Event Name and other fields that may be required by the system – You need to type in all information for the NEXT key to become active and be able to go to the next event creation page.
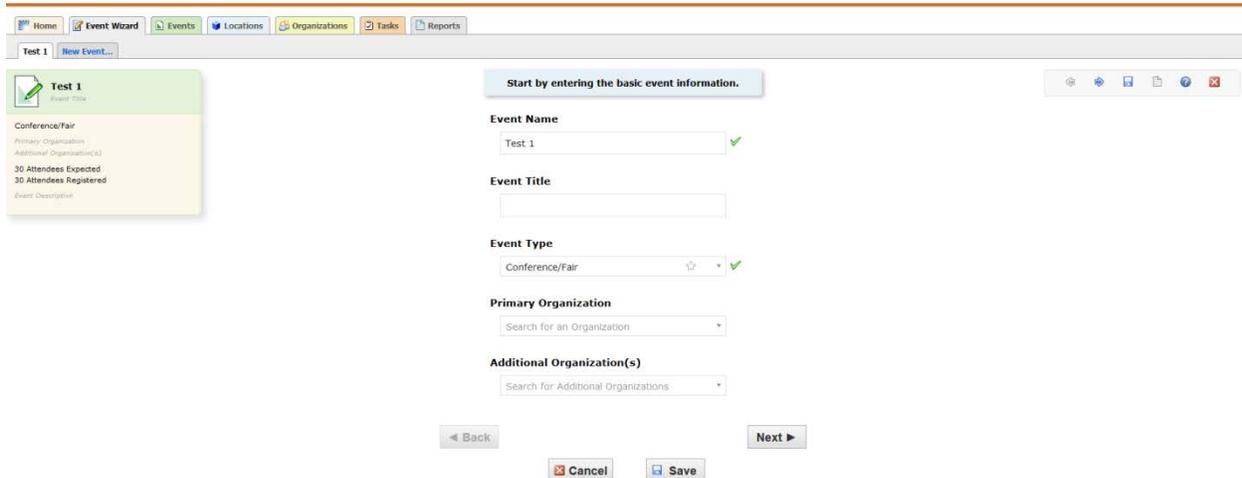
Type in Expected Head Count and Registered Head Count

Click NEXT

Screen below will allow you to indicate the number of occurrences your event will have.

Is your event a "one time only" kind of event or will it have multiple occurrences? Select No or Yes in order for the system to pull the needed data.
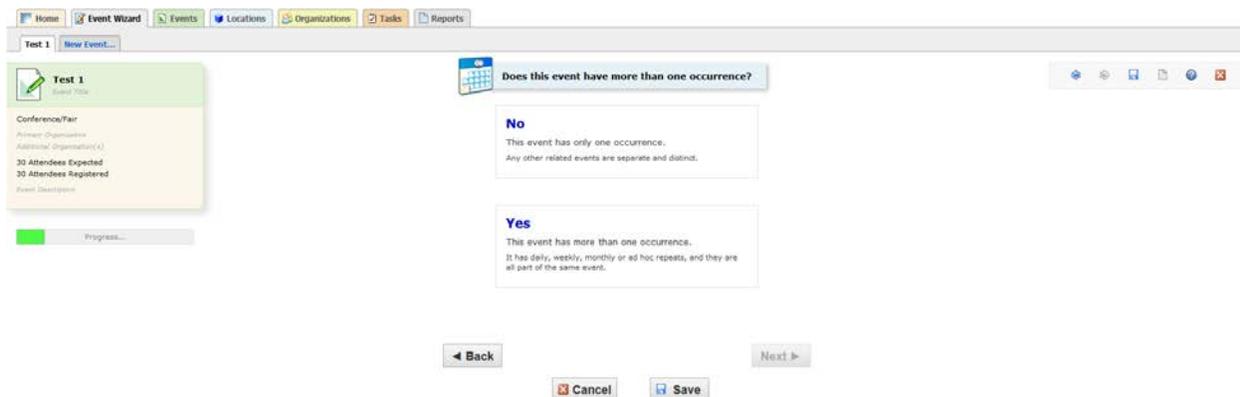
A. **If your event will only happen once (one day event), click No** – this will indicate that your event will not have more than one occurrence.

At that point the system will prompt you to indicate the exact date and time for your event.

Click on the calendar icon showing on the Event Start line to select corresponding date.

Select a date only for the Event Start field. The Event End field will update once you select the Start date.

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Tell us WHEN this event takes place.

*Select the dates and times of the **actual event**.*
Setup, takedown, pre- or post-event times can be specified below.

Event Start: Tue Dec-09-2014   12:00 pm

Event End: 1:00 pm

	December 2014	
Su Mo Tu We Th Fr Sa		

Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Does this event r
Setup or **Pre-E**   es   ⦿ **No**

Does this event require
Post-Event or **Takedown** time?   ○ **Yes**   ⦿ **No**

Keep in mind that Event Start and Event End should reflect same date for events having only one occurrence.

Select Start Time by clicking on the time field

Select the start time of your event.

Click on Event End TIME and modify to reflect your event end time.

If desired, use the **Setup or Pre-Event** and the **Post-Event or Takedown times** to set up buffer times between events.

OCM recommends leaving a 10 to 15min buffer between events in order to allow space users time to leave/enter the space and avoid event conflicts.

B. **If your event will take place on different dates but at the same time-slot, click on Yes**, to indicate that your event will have more than one occurrence, so you can select all other dates your event will be meeting in the same location(s) you select

Click on NEXT key

Find and Select Location same way you search to assign a location for an academic event.
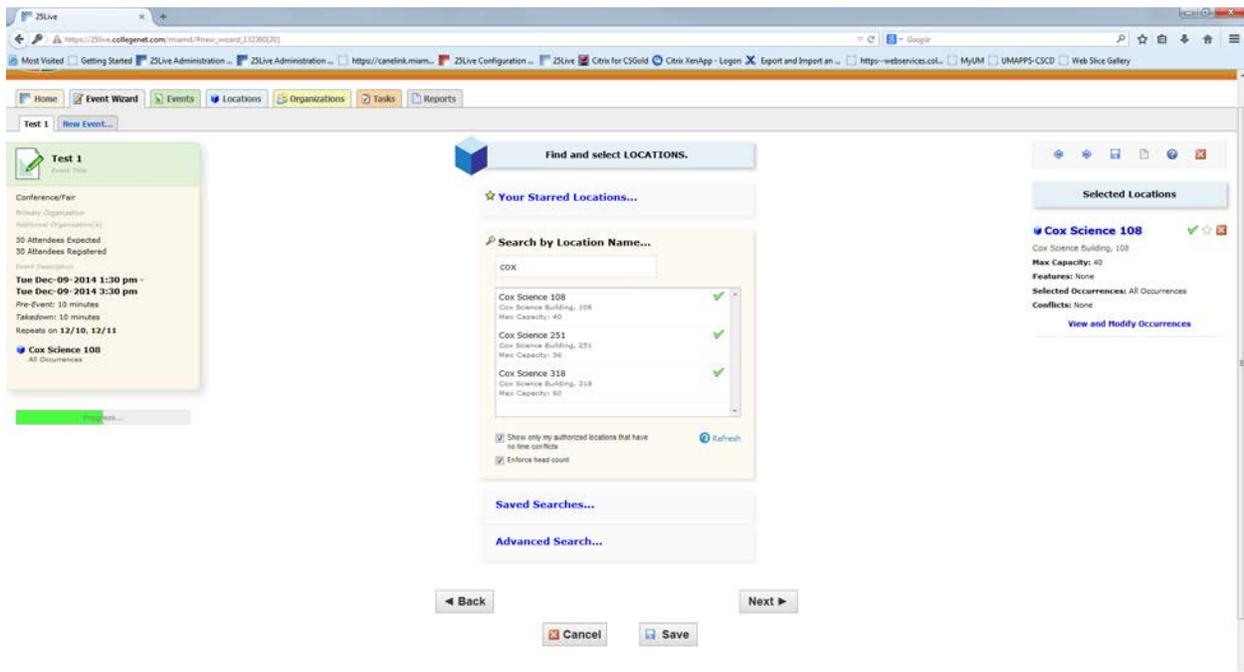
Keep in mind that you have three different options to check for locations:
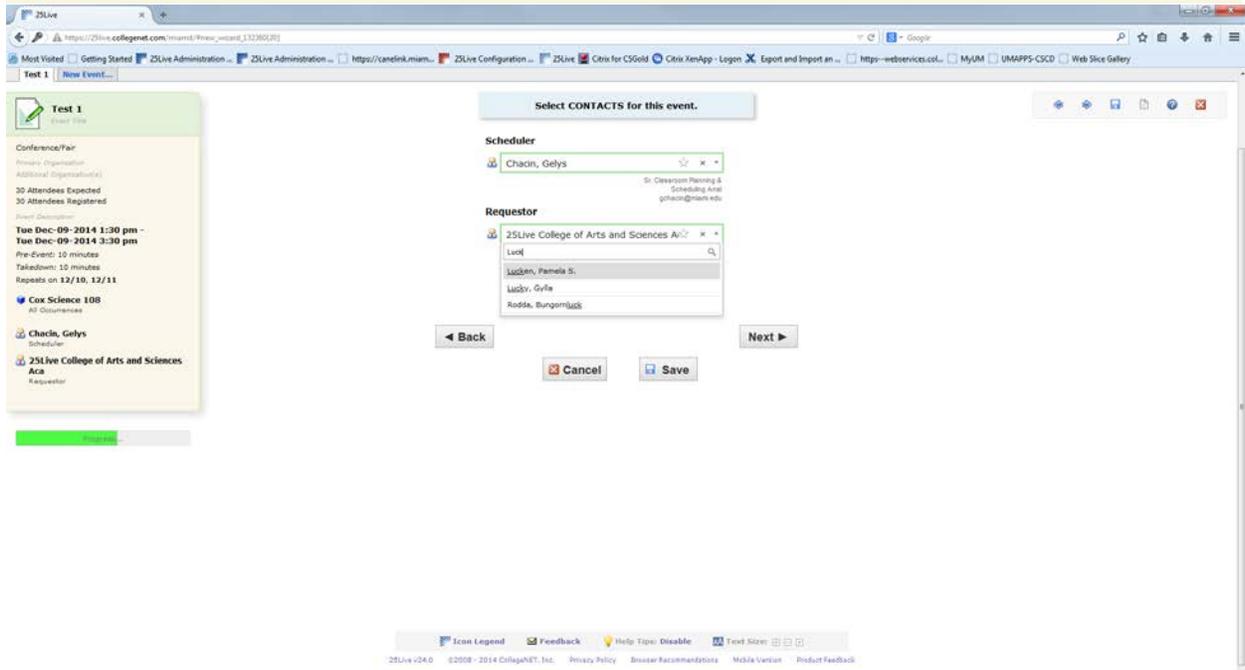
Your Starred Locations

Search by Location Name

Advanced Search

Click NEXT

Select Contacts for your event - Type in last name for the event scheduler and requestor. Click over the name to select.
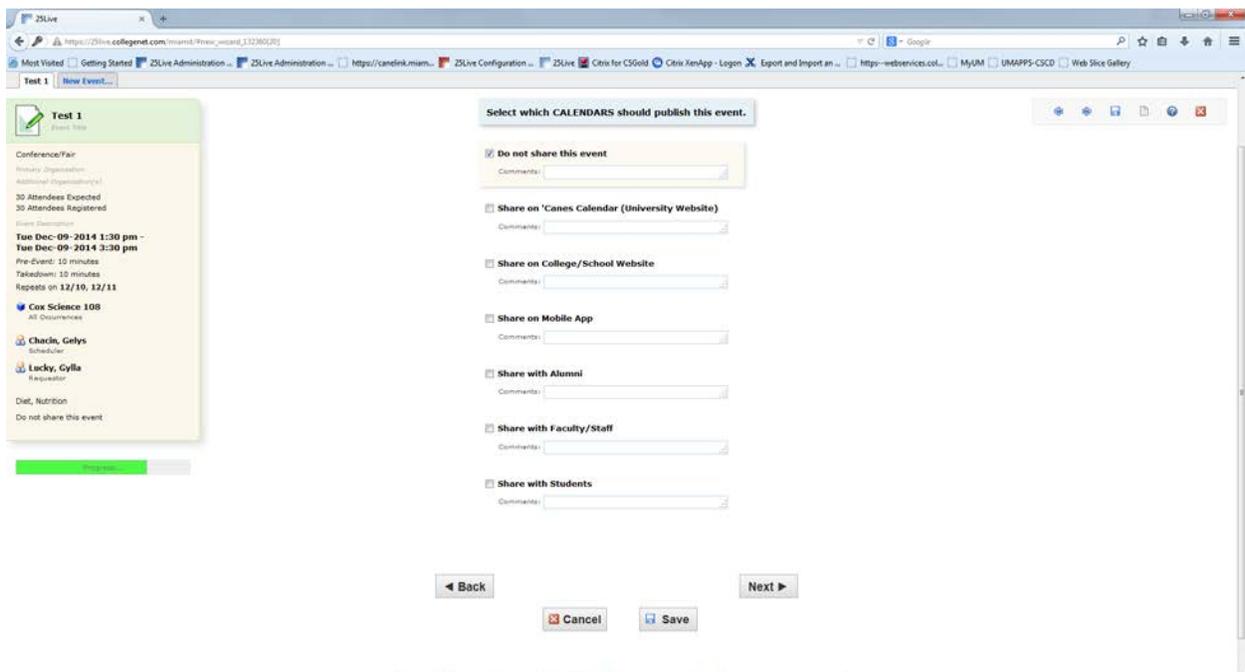
Click NEXT

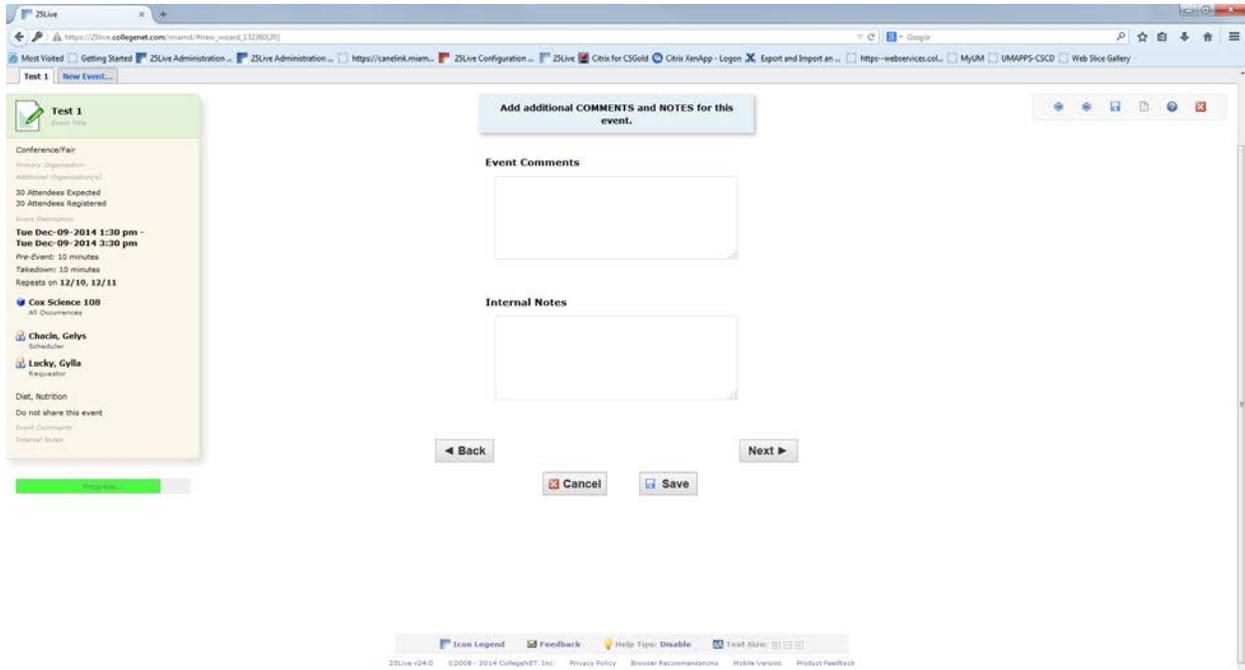If you would like to have your even published on the UM calendar select the Share on 'Canes Calendar option.


Click Next

Add any Events Comments and/or Internal Notes that you would like to have recorded for this reservation.

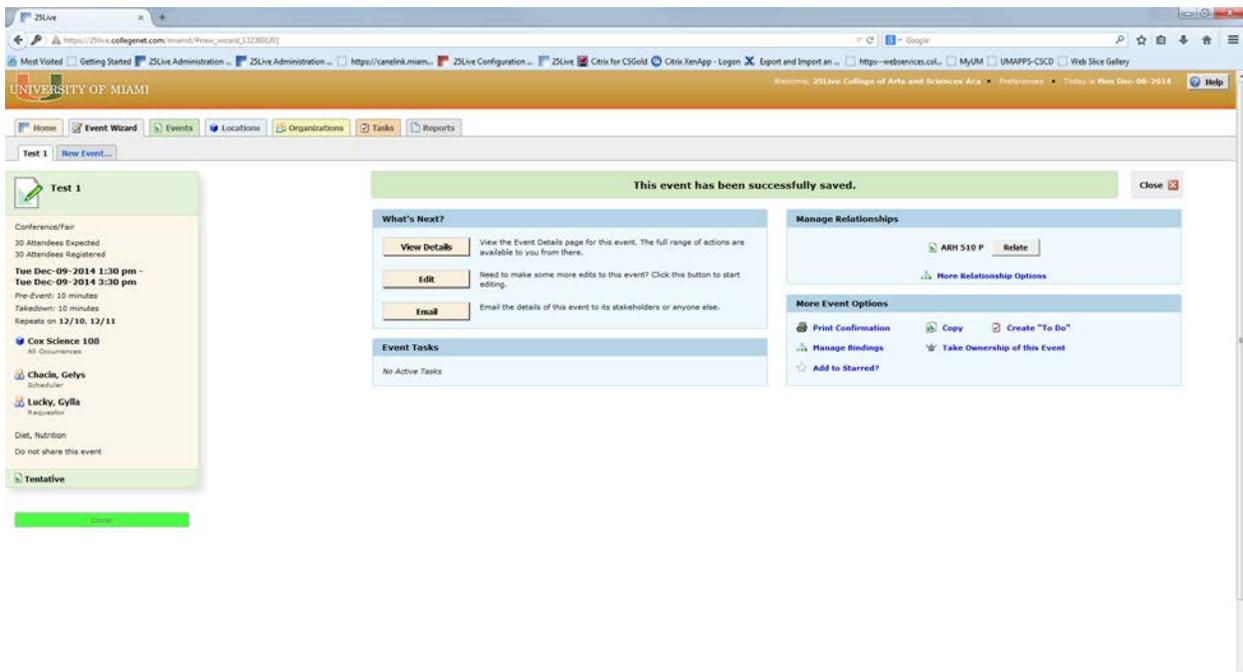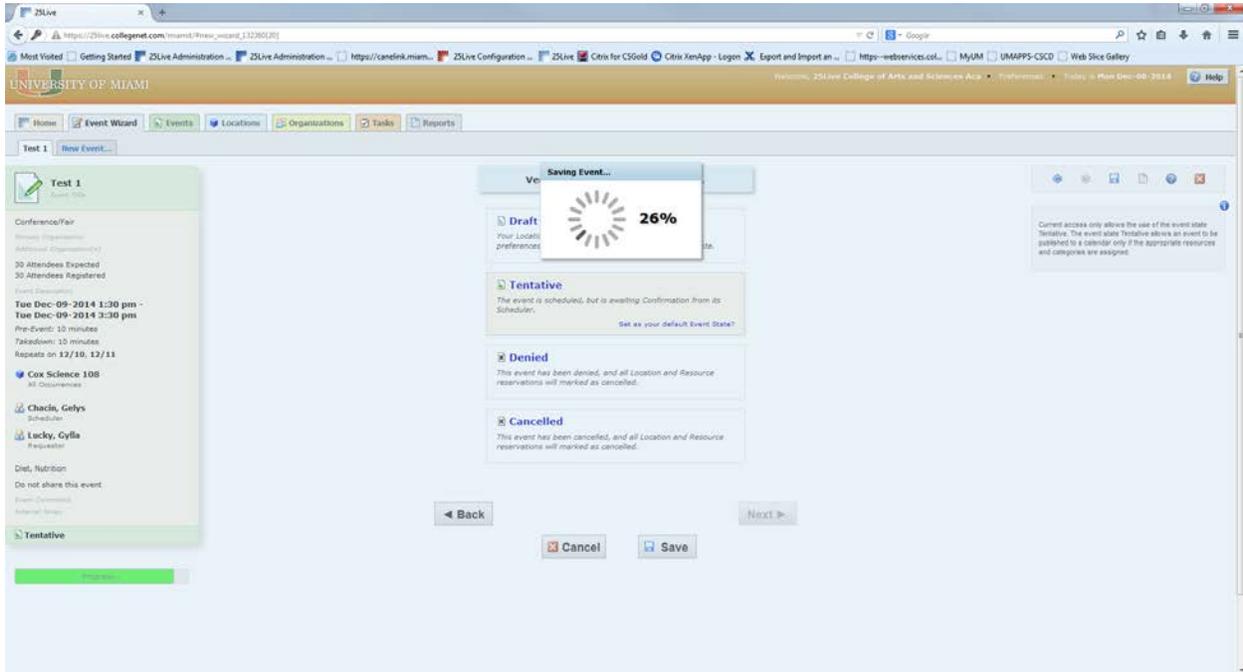Click Next

Select Event State

- o Tentative will allow you to save your event with location assigned.
- o Draft will not allow you to save location
- o Denied will remove any location already selected – you will need to notify requestor of denial
- o Cancelled will remove location and cancelled reservation.
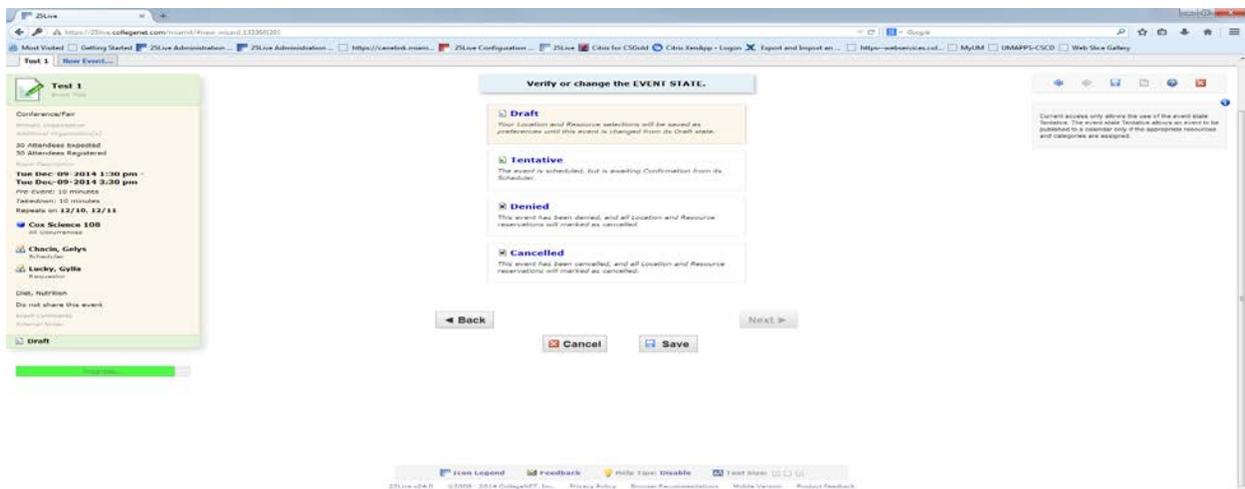
Click SAVE

Screen above shows event saved successfully.

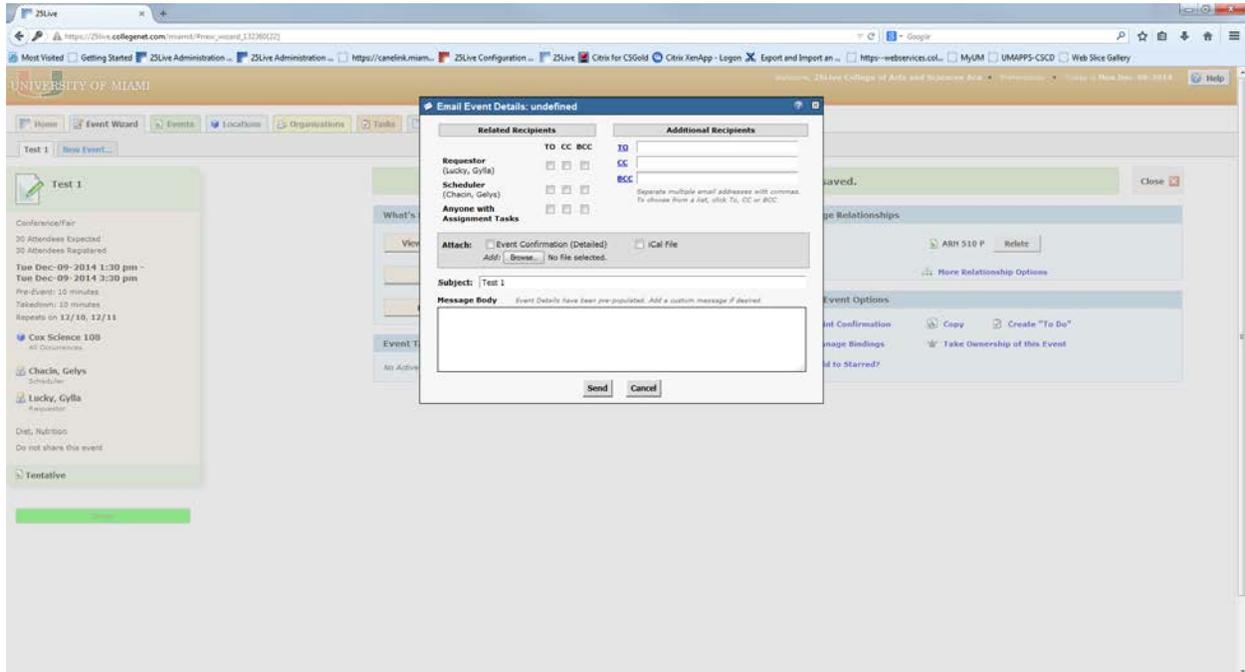Notice that the Progress Bar on the lower left corner of the screen shows the word Done.

From screen above, you are able to:

- View Details of your event
- Edit your event
- Email your event and even attached a file

See below, Email option pop-up screen

Select the way you would like to send the event confirmation email to the requestor(s) and the scheduler. To attach a PDF containing confirmation details, click on the check box for Event Confirmation.

If you need to attach an additional file to the confirmation email, click on the Browse key to locate file in your computer or desktop and attach it to the confirmation email before clicking on Send.