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REVISION HISTORY
run reports

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<td>Heather Edberg</td>
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<td>Margaret Stewart</td>
<td>Updated procedures to reflect performance under LYNX interface (effective Winter 2018)</td>
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<td>3</td>
<td>8/9/19</td>
<td>Erik Staiger</td>
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### Introduction and Purpose

The purpose of this document is to outline how to run a report to extract scheduling and room data from 25Live. Steps are provided to run the two most common report types: Event and Location.

### Related Policies, Regulations, Guiding Principles, and Common Practices

Academic course sections are created and updated in Banner; course data travels from Banner to 25Live via the LYNX transactional process. All classroom scheduling and unscheduling is done in 25Live with room assignments for course sections transacting back to Banner. While reporting exists in COGNOS and BannerApps to extract course information including room assignments, 25Live provides other types of reporting that utilizes calendars and summary lists; allows for report data on spot-scheduled events (which reside only in 25Live); and provides availability matrices that academic departments can use to find an open room at a given day and time.

### 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 Pro Test (https://25live.collegenet.com/pro/ucrt#!/home/dash) to follow along.

### Pages

No Banner pages are addressed in these procedures.
PROCEDURES

RUNNING EVENT REPORTS

Prior to running an event report, an event search that pulls the desired data needs to be created. Please refer to 25Live procedures “25Live – Create an Event Search” for more information. The following report examples are based on the event searches created in the procedures cited above.

STEPS

1. Click the More button at the top right of the main screen in 25 Live Pro, then Reports.
2. In this example, a report will be generated that lists the Fall 2018 lectures being offered in the Cell Biology and Neuroscience Department.
3. Navigate to the Event Reports sub-tab.
4. In the Select an Item drop-down menu, select Academic Term Summary – Excel.
5. See following:

   - Excel option allows user to add/delete columns/rows and format as desired.
   - Required so report has output
   - Default option

6. Every listed report parameter with a red asterick is required.
7. From the Event Search pop-up menu, select the desired search.
   a. In this example, the search created in procedures “25Live – Create an Event Search” will be selected (CBNS Lectures).
   b. The search can be recreated with the following parameters:
      i. Cabinet: 201840 (Fall)
      ii. Event Types: Include Any: LEC (Lecture)
iii. Organizations: Include Any: CBNS

8. Select one of the **Report Delivery Options**.
   a. **Tip:** emailing the report to yourself is the quickest method to generate the report.

9. Once all required parameters and a delivery option have been selected, click **Run Report** button below the Delivery Options.

10. See following:

11. Reports with more data will take longer to generate. Once ready, either a prompt to open the report will come up, or the report will be emailed to the user.

12. See following:

13. The opened Excel will have two worksheets. The first worksheet lists a summary of that report’s parameters; the second worksheet lists the report output.

14. See following:
15. In the next example, an events report will be generated that will pull up in a calendar format **spot-scheduled Chemistry review sessions** during **Spring 2018 final exams week** in **general assignment classrooms**.
   a. In this example, the search created in procedures “25Live – Create an Event Search” will be selected (**CHEM review sessions**).
   b. The search can be recreated with the following parameters:
      i. **Cabinet**: **2018 Spot Scheduling**
      ii. **Event Types**: Include Any: **Review Session**
      iii. **Organizations**: Include Any: **CHEM**
16. If not already there, navigate to the **Reports** by clicking the **More** button at the top right of the main screen in 25 Live Pro, then **Reports**.
17. Then click the **Event Reports** sub-tab.
18. From the **Choose a Report...** pop-up menu, select **Calendar of Events (5 Day)**.
19. See following:

20. In the **Event Search**, select the desired search that will list the desired events in this report.
   a. In this example, select **CHEM review sessions** (title may vary by user input).
21. In the **Location Search**, scroll down the pop-up menu until the **Public Searches** section is reached.
   a. Public searches are available to all registered 25Live users.
   b. Select the public search **General Assignment Classrooms (All)**.
22. Set the **start date** at **June 11, 2018** (first day of the full final exams week).
   a. This will list **CHEM review sessions** scheduled from **Monday, June 11** to **Friday, June 15**.
23. **Report Delivery Options** – leave default selected (**Email this report to yourself**).
24. **Report Format Options** – leave default selected (**PDF**).
   a. PDF version cannot be edited.
25. Click: **Run Report** button at bottom right of screen.
26. Reports with more data will take longer to generate. Once ready, either a prompt to open the report will come up, or the report will be emailed to the user.
27. See following:

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**RUNNING LOCATION REPORTS**

Prior to running a location report, a location search that pulls the desired data needs to be created. Please refer to 25Live procedures “25Live – Create a Locations Search” for more information. The following report examples are based on the location searches created in the procedures cited above.

**STEPS**

1. If not already there, navigate to **Reports** by clicking the **More** button at the top right of the main screen in 25 Live Pro, then **Reports**.
2. In this example, a report will be generated that lists the department classrooms that is the search output for **Location search “SPR and WAT Dept Rooms.”**
   a. This search can be recreated with the following parameters:
      i. Specific Locations: **SPR 1206, 1224, 1343, 1357, 2206, 2228, 3123, 4128; WAT 1126, 1147, 1347, and 1350**.
3. Navigate to the **Location Reports** sub-tab.
4. In the the **Choose a Report...** pop-up menu, select **Location Listing – Excel**.
5. See following:
In the Location Search pop-up menu, select the search that will list the desired locations in this report.
  a. In this example, the search created in procedures “25Live – Create a Location Search” will be selected (SPR and WAT Dept Rooms).

7. Select one of the Report Delivery Options.
8. After report parameter and delivery option have been selected, click Run Report button at bottom right of screen.
9. Reports with more data will take longer to generate. Once ready, either a prompt to open the report will come up, or the report will be emailed to the user.
10. The opened Excel will have two worksheets. The first worksheet lists a summary of that report’s parameters; the second worksheet lists the report output.
11. See following:

12. In the next example, a locations report will be generated that lists what is scheduled in a given group of rooms on a specific date.
  a. In this example, the search created in procedures “25Live – Create a Location Search” will be selected (GE rooms in bldgs BCOE likes).
    i. This search can be recreated with the following parameters:
       1. Partitions: Include Any: BRNHL, CHUNG, MSE, and SURGE.
13. If not already there, navigate to Reports by clicking the More button at the top right of the main screen in 25 Live Pro, then Reports, then to the Location Reports sub-tab.
14. In the Choose a Report... pop-up menu, select Daily Room Sheet.
15. See following:

16. For **Report Date**, select desired date.
   a. In this example, select **Tuesday, October 2, 2018**.

17. In the **Location Search** pop-up menu, select the search that will list the desired locations in this report.
   a. In this example, the search created in procedures “**25Live – Create a Location Search**” will be selected (**GE rooms in bldgs BCOE likes**).

18. For report parameter not required, leave default selection.

19. Select one of the **Report Delivery Options**.

20. Select one of the **Report Format Options**.

21. After report parameters, report delivery, and report format options have been selected, click **Run Report** button at bottom right of screen.

22. Reports with more data will take longer to generate. Once ready, either a prompt to open the report will come up, or the report will be emailed to the user.

23. See following:
In the next example, a locations report will be generated that provides on a given date availability in a specific set of classrooms.

   a. In this example, the search created in procedures “25Live – Create a Location Search” will be selected (GE rooms 30-45).

      i. This search can be recreated with the following parameters:

If not already there, navigate to **Reports** by clicking the **More** button at the top right of the main screen in 25 Live Pro, then to the **Location Reports** sub-tab.

In the **Select an item** pop-up menu, select **Classroom Availability Matrix – SACT**.

a. The **SACT matrix** provides an hour-by-hour breakdown.

b. While this report is commonly used for scheduling full-term academic course sections, it is also useful for quickly identifying availability in a specific group of classrooms on a given date or date range.

c. For procedures on how to run the classroom availability matrices for scheduling course sections, see “25Live – How to Run the Space Availability Matrix 2018.”

See following:

![Classroom Availability Matrix - SACT](image)

**Select Report Parameters**

- **Four required parameters**.
  - **Start Date**: 
    - Fri Aug 09 2019
  - **End Date**: 
    - Fri Aug 09 2019
  - **Location Search**: 
    - Select a search
  - **Pad Time**: 
    - 0 (zero)

**Sort by Capacity**

- **Yes**

**Target Pattern Duration**: 

- 0 (zero)

**Parameter not required, but recommend changing to Yes**.

For **Start Date**, select desired date.

a. In this example, select **Wednesday, October 24**.

For **End Date**, select desired date.

a. In this example, looking for one-day openings so select **October 24**.

In the **Location Search** pop-up menu, select the search that will list the desired locations in this report.

a. In this example, the search created in procedures “25Live – Create a Location Search” will be selected (GE rooms 30-45).

In the **Pad Time** field, enter **0 (zero)**.

Change the **Sort by Capacity** option from **No** to **Yes**.

For report parameters not required, leave default selections.

Select one of the **Report Delivery Options**.

After report parameters and delivery option have been selected, click **Run Report** button at bottom right of screen.

Reports with more data will take longer to generate. Once ready, either a prompt to open the report will come up, or the report will be emailed to the user.

The opened Excel will have two worksheets. The first worksheet lists a summary of that report’s parameters; the second worksheet lists the report output.
38. See following:

Classroom Availability Matrix – SACT, worksheet #2 (partial view);
Wednesday, October 24, 2018

| MP Day(s) of Week | MP Start Time | MP End Time | MP Duration | (30) GL/H 1116 | (30) GL/H 1122 | (30) GL/H 1123 | (30) GL/H 1132 | (30) WAT 1117 | (31) LFSC 2410 | (39) QL/H 1127 | (39) QL/H 1133 | (39) SPFH 1222 | (39) JFSE 011 | (39) JFSE 113 | (39) QL/H 4210 | (39) QL/H 1339 | (37) SPR 2381 | (39) SPR 2385 | (39) SPR 2390 | (39) SPR 2395 | (40) SPR 2391 | (40) SPR 2395 | (40) SPR 2391 | (40) SPR 2395 | (40) SPR 2391 | (40) SPR 2395 | (40) SPR 2391 |
|------------------|---------------|-------------|-------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| W                | 7:10 AM       | 8:00 AM     | 50          | x x x x       |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 8:10 AM       | 9:00 AM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 9:10 AM       | 10:00 AM    | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 10:10 AM      | 11:00 AM    | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 11:10 AM      | 12:00 PM    | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 12:10 PM      | 1:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 1:10 PM       | 2:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 2:10 PM       | 3:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 3:10 PM       | 4:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 4:10 PM       | 5:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 5:10 PM       | 6:00 PM     | 50          | x x x x       | x               |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 6:10 PM       | 7:00 PM     | 50          | x x x x       |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 7:10 PM       | 8:00 PM     | 50          | x x x x       |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 8:10 PM       | 9:00 PM     | 50          | x x x x       |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |
| W                | 9:10 PM       | 10:00 PM    | 50          | x x x x       |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |                 |