

RUN REPORTS

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REVISION HISTORY

Version	Date	Name	Description
1	06/18/15	Heather Edberg	Initial procedures (TCS)
2	7/24/18	Margaret Stewart	Updated procedures to reflect performance under LYNX interface (effective Winter 2018)
3	8/9/19	Erik Staiger	Updated procedures and screenshots to reflect upcoming transition to 25Live Pro
4	11/20/19	Margaret Stewart	Minor edits and deleted Final Quiz section

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.

Page	Page Name	Description

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:

Starred Reports **Event Reports** Location Reports Resource Reports Other Reports

Academic Term Summary - Excel

Excel option allows user to add/delete columns/rows and format as desired.

About This Report

Academic Term Summary - Excel

Lists events scheduled during an academic term: the department, meeting times for any building, and any building; the instructor; and the room(s) where the report

Purpose and description of report

Required so report has output

This report is designed to open directly in Microsoft Excel or Open Office Calc. The Excel Workbook contains two worksheets. The first worksheet lists the report parameters supplied by the user when the report was run. The second worksheet (Class Listing-2) lists the relevant event data.

You might print this report at the end of the scheduling process for a term to have a printed copy of all classes and scheduling details.

Parameters

- Event search (a saved event search definition to specify the events to report on).

Data Included

- Only records returned by the event search are evaluated for inclusion.
- Only events with an organization defined are included in the report.
- Only events for which you have security privileges are included in the report.

Select Report Parameters

* Event Search:

Select a search

Report Delivery Options

View this report now

Email this report to yourself

Email this report to...

Default option

Run Report

View Sample Report

Can see report format before generating it.

6. Every listed **report parameter** with a **red asterisk** 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:


Report Name	Academic Term Summary - Excel
Event Search	CBNS Lectures
Total Events	10
Print Date/Time	Jul 25 2018, 11:27 A.M.

Course	Title	Reference #	Reservation Name
CBNS 101 001 23296	FUNDAMENTALS OF CELL BIOLOGY	2018-AAWKDA	MWF 1410-1500
CBNS 106 001 11705	INTRODUCTION TO NEUROSCIENCE	2018-AAWDFJ	TR 0810-0930
CBNS 120L 001 11716	NEUROSCIENCE LABORATORY	2018-AAWGWM	W 0810-0900
CBNS 120L 002 11717	NEUROSCIENCE LABORATORY	2018-AAWGWN	W 1310-1400
CBNS 121 001 XL 24395	DEVELOPMENTAL NEUROSCIENCE	2018-AAWLQH	TR 1540-1700

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:

Calendar of Events (5 Day) ↕
↻

About This Report

 Calendar of Events

These reports list scheduled events for a three-, five- or seven-day period beginning with a specified date. You can use them for a quick glance at the dates, times, and locations of upcoming events.

Parameters

- Event search (a saved event search to indicate which events to evaluate). Be cautious about including date criteria in your event search definition. They may help the report run faster, but be sure the date span of the event search is compatible with the start date entered for the report parameter.
- Location search (a saved location search to indicate which locations to evaluate).
- Start date.

Data Included

- Only records returned by the searches are evaluated for inclusion.
- Only events with assigned locations are included in the report.
- Only events and locations for which you have security privileges are included in the search results.

[View Sample Report](#)

Select Report Parameters

* Event Search:

* Start Date:

* Location Search:

All three report parameters are required.

Report Delivery Options

View this report now

Email this report to yourself

Email this report to...

Report Format Options

PDF

Excel

Rich Text Format

HTML

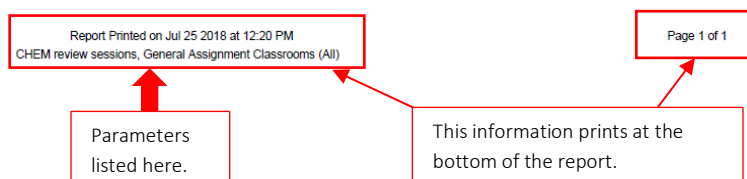
Text

[Run Report](#)

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:

Jun 11 2018 - Jun 15 2018					Calendar of Events (5 Day)				
Monday Jun 11 2018		Tuesday Jun 12 2018		Wednesday Jun 13 2018		Thursday Jun 14 2018		Friday Jun 15 2018	
				11:30 am-2:30 pm CHEM 008C-1 Review Session (June 13) CHUNG 138		8:00 am-11:00 am CHEM 008C-1 Review Session (June 14) BRNHL A125			



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:

Starred Reports **Event Reports** **Location Reports** **Resource Reports** **Other Reports**

Location Listing - Excel

About This Report

Location Listing Excel

Only one parameter

This report lists specified locations. You might use it to verify that the list of locations in 25Live is complete, and that the basic data about those locations is accurate.

This report is designed to open directly in Microsoft Excel or Open Office Calc. The Excel Workbook contains two worksheets. The first worksheet lists the report parameters supplied by the user when the report was run. The second worksheet lists the following location data:

- Location Short Name
- Location Formal Name

Select Report Parameters

Location Search: Select a search

Report Delivery Options

View this report now
 Email this report to yourself
 Email this report to...

Default option

Run Report

6. 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:

Location Listing – Excel; worksheet #2 (partial view)

Location Name	Location Formal Name	Location Scheduler	Max Capacity
SPR 1206	Sproul Hall	Jobelius-Morrison, Samantha	30
SPR 1224	OPEN LAB COMPUTER	Jobelius-Morrison, Samantha	24
SPR 1343	OPEN LAB COMPUTER	Jobelius-Morrison, Samantha	20
SPR 1357	CONFERENCE - TEACHING	Jobelius-Morrison, Samantha	28
SPR 2206	CLASS LAB	Scalf, Bradley T.	50
SPR 2228	OPEN COMPUTER LAB		18
SPR 3123	250 - SCHOLARLY ACTIVITY		12
SPR 4128	CONFERENCE ROOM	Scalf, Bradley T.	18
WAT 1126	CONFERENCE	Wire, Anna	25
WAT 1147	OPEN LAB COMPUTER		28
WAT 1347	CLASS LAB	Wire, Anna	25
WAT 1350	CLASS LAB	Wire, Anna	70

This report can be formatted, if desired.


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:

Starred Reports
Event Reports
Location Reports
Resource Reports
Other Reports

Daily Room Sheet ↻

About This Report

 Daily Room Sheet

This report lists the events occurring in a set of specified locations on a specified date. The report makes it easy to see what's happening in a location on a given day, to see when the location is available for maintenance or housekeeping, and to determine open and lock schedules.

Parameters

- Report Date. For this search, two parameters are required; one is not.
- Location search (a saved location search definition to indicate which locations are to be included).
- Print Only Locations With Events (optional).

Data Included

- Only records returned by the location search are evaluated for inclusion.

Select Report Parameters

* Location Search:

* Report Date:

Hide Unused Locations:
 Yes No

Report Delivery Options

View this report now

Email this report to yourself

Email this report to...

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.

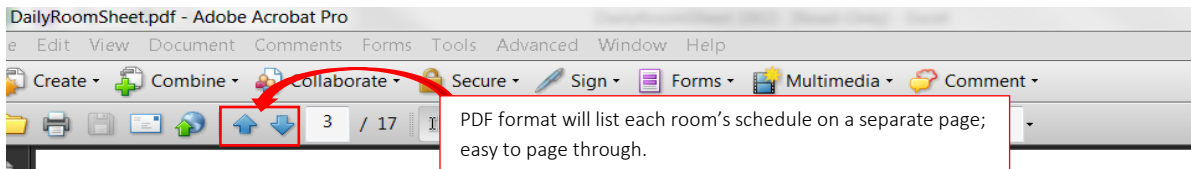
19. Select one of the **Report Delivery Options**.

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:



Tuesday, Oct 2 2018

CHUNG 138

Event Times	Event	Contact
8:10 AM - 9:30 AM	CS 111 001 13059, TR 0810-0930	
9:40 AM - 11:00 AM	EE 110A 001 13901, TR 0940-1100	
11:10 AM - 12:30 PM	CS 061 002 13049, TR 1110-1230	
12:40 PM - 2:00 PM	EE 115 001 13904, TR 1240-1400	
3:10 PM - 4:00 PM	GEO 191 001 15541, T 1510-1600	
5:10 PM - 6:30 PM	ENGR 180W 001 14593, TR 1710-1830	
6:40 PM - 8:00 PM	MATH 007A 030 26393, TR 1840-2000	

Oct 2 2018 BRNHL A125

Excel format will list the schedules of as many rooms as allowed for the selected page orientation (Portrait or Landscape). Excel also allows for customizing the room sheet.

Event Times	Event	Contact
8:10 AM - 9:30 AM	MATH 009B 040 24466, TR 0810-0930	
9:40 AM - 11:00 AM	MATH 009A 010 23319, TR 0940-1100	
11:10 AM - 12:30 PM	CS 150 001 26234, TR 1110-1230	
12:40 PM - 2:00 PM	MATH 007B 040 23683, TR 1240-1400	
2:10 PM - 3:30 PM	MATH 010A 010 23414, TR 1410-1530	
3:40 PM - 5:00 PM	BIOL 107A 001 23309, TR 1540-1700	
5:10 PM - 6:30 PM	MATH 031 001 23457, TR 1710-1830	
6:40 PM - 8:00 PM	MATH 007B 010 26398, TR 1840-2000	

BRNHL B118

Event Times	Event	Contact
8:10 AM - 9:30 AM	PSYC 049 001 21223, TR 0810-0930	
9:40 AM - 11:00 AM	ENTM 010 001 14744, TR 0940-1100	
11:10 AM - 12:30 PM	HIST 020W 050 20833, TR 1110-1230	
12:40 PM - 2:00 PM	CHEM 001C 001 11967, TR 1240-1400	
2:10 PM - 3:30 PM	BUS 107 001 11642, TR 1410-1530	

24. 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:
 1. Categories: Include Any: **GE – General Assignment.**
 2. General: Minimum Capacity: **30.**
 3. General: Maximum Capacity: **45.**

25. 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.
26. 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.”**
27. See following:

Starred Reports Event Reports **Location Reports** Resource Reports Other Reports

Classroom Availability Matrix - SACT

About This Report

Classroom Availability Matrix for Secondary Activities

- Meeting patterns effective Fall 2019 -

Utilize this report to search for available classrooms for secondary activity sections. This report shows the classrooms available, within a date range, for each standard meeting pattern for secondary activities. This report is designed to be opened directly in Microsoft Excel and will contain two worksheets. The first worksheet lists the report parameters supplied by the user when the report was run. The second worksheet will display the classroom availability data.

Parameters

- **Location Search:** A saved location search is required to define which classrooms to evaluate. If you need assistance with this, Academic Scheduling recommends utilizing a public search. These searches were created for all 25Live users at UC Riverside and can be found at the bottom of the list of available location searches.
- **Start/End Date:** Select the Monday and Friday of any full week of

Four required parameters.

Select Report Parameters

* **Start Date:**
Fri Aug 09 2019

* **End Date:**
Fri Aug 09 2019

* **Location Search:**
Select a search

* **Pad Time:**
[dropdown]

Sort by Capacity:
 Yes No

Target Pattern Duration:
[dropdown]

Parameter not required, but recommend changing to Yes.

28. For **Start Date**, select desired date.
 - a. In this example, select **Wednesday, October 24**.
29. For **End Date**, select desired date.
 - a. In this example, looking for one-day openings so select **October 24**.
30. 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**).
31. In the **Pad Time** field, enter **0 (zero)**.
32. Change the **Sort by Capacity** option from **No** to **Yes**.
33. For report parameters not required, leave default selections.
34. Select one of the **Report Delivery Options**.
35. After report parameters and delivery option have been selected, click **Run Report** button at bottom right of screen.
36. 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.
37. 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) OLMH 1116	(30) OLMH 1122	(30) OLMH 1123	(30) OLMH 1132	(30) WAT 1117	(31) LFSC 2418	(35) OLMH 1127	(35) OLMH 1133	(35) SPTH 1222	(36) MSE 011	(36) MSE 113	(36) OLMH 420	(37) SPR 2361	(38) CHUNG 139	(38) SPR 2356	(39) CHUNG 141	(40) SPR 2339	(40) SPR 2360	(40) SPR 2365	(40) SURGE 170	(44) SPR 2351
W	7:10 AM	8:00 AM	50	x	x	x	x			x	x				x		x							
W	8:10 AM	9:00 AM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x		x	x	x	x	x
W	9:10 AM	10:00 AM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	10:10 AM	11:00 AM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	11:10 AM	12:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	12:10 PM	1:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	1:10 PM	2:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	2:10 PM	3:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	3:10 PM	4:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	4:10 PM	5:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	5:10 PM	6:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	6:10 PM	7:00 PM	50	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
W	7:10 PM	8:00 PM						x	x		x	x	x	x		x	x	x	x	x	x	x	x	x
W	8:10 PM	9:00 PM						x			x	x		x	x	x	x		x	x	x			
W	9:10 PM	10:00 PM																		x				

X indicates room not available at that time.

White space indicates room open at that time.