# RUN REPORTS

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</tbody>
</table>
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 Test (https://25live.collegenet.com/ucrt/#home_my25live[0]) to follow along.

PAGES

No Banner pages are addressed in these 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. Navigate to the Reports tab.
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 Choose a Report... pop-up menu, select Academic Term Summary – Excel.
5. See following:

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).
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 at bottom right of screen.
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).

16. If not already there, navigate to the Reports tab, then to the Event Reports sub-tab.

17. From the Choose a Report... pop-up menu, select Calendar of Events (5 Day).
18. See following:

19. 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.
20. 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).
21. 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.
22. Report Delivery Options – leave default selected (Email this report to yourself).
   a. PDF version cannot be edited.
24. Click: Run Report button at bottom right of screen.
25. 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.
26. See following:
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. Navigate to the Reports tab.
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.”
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:

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:

<table>
<thead>
<tr>
<th>Location Name</th>
<th>Location Formal Name</th>
<th>Location Scheduler</th>
<th>Max Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPR 1206</td>
<td>Sproul Hall</td>
<td>Jobelius-Morrison, Samantha</td>
<td>30</td>
</tr>
<tr>
<td>SPR 1224</td>
<td>OPEN LAB COMPUTER</td>
<td>Jobelius-Morrison, Samantha</td>
<td>24</td>
</tr>
<tr>
<td>SPR 1343</td>
<td>OPEN LAB COMPUTER</td>
<td>Jobelius-Morrison, Samantha</td>
<td>20</td>
</tr>
<tr>
<td>SPR 1357</td>
<td>CONFERENCE - TEACHING</td>
<td>Jobelius-Morrison, Samantha</td>
<td>28</td>
</tr>
<tr>
<td>SPR 2206</td>
<td>CLASS LAB</td>
<td>Scaf, Bradley T.</td>
<td>50</td>
</tr>
<tr>
<td>SPR 2228</td>
<td>OPEN COMPUTER LAB</td>
<td></td>
<td>18</td>
</tr>
<tr>
<td>SPR 3123</td>
<td>250 - SCHOLARLY ACTIVITY</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>SPR 4128</td>
<td>CONFERENCE ROOM</td>
<td>Scaf, Bradley T.</td>
<td>18</td>
</tr>
<tr>
<td>WAT 1125</td>
<td>CONFERENCE</td>
<td>Wine, Anna</td>
<td>25</td>
</tr>
<tr>
<td>WAT 1147</td>
<td>OPEN LAB COMPUTER</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>WAT 1347</td>
<td>CLASS LAB</td>
<td>Wine, Anna</td>
<td>25</td>
</tr>
<tr>
<td>WAT 1350</td>
<td>CLASS LAB</td>
<td>Wine, Anna</td>
<td>70</td>
</tr>
</tbody>
</table>

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).
13. If not already there, navigate to the Reports tab, 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).

25. If not already there, navigate to the Reports tab, then to the Location Reports sub-tab.
26. In the Choose a Report… 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:

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

<table>
<thead>
<tr>
<th>MP Day(s) of Week</th>
<th>MP Start Time</th>
<th>MP End Time</th>
<th>MP Duration</th>
<th>Location 1</th>
<th>Location 2</th>
<th>Location 3</th>
<th>Location 4</th>
<th>Location 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>W</td>
<td>7:10 AM</td>
<td>8:00 AM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>8:10 AM</td>
<td>9:00 AM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>9:10 AM</td>
<td>10:00 AM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>10:10 AM</td>
<td>11:00 AM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>11:10 AM</td>
<td>12:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>12:10 PM</td>
<td>1:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>1:10 PM</td>
<td>2:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>2:10 PM</td>
<td>3:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>3:10 PM</td>
<td>4:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>4:10 PM</td>
<td>5:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>5:10 PM</td>
<td>6:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>6:10 PM</td>
<td>7:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>7:10 PM</td>
<td>8:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>8:10 PM</td>
<td>9:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>W</td>
<td>9:10 PM</td>
<td>10:00 PM</td>
<td>50</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

White space indicates room open at that time.

X indicates room not available at that time.

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FINAL QUIZ

1. True or False: The majority of 25Live reports require either an Event or Location search as a report parameter.
   a. True

2. To run an event report, first navigate to the ____________ tab, then the _____________ sub-tab.
   a. Reports; Event Reports

3. How is a required report parameter in 25Live identified?
   a. Red asterisk

4. What data does the Location Listing - Excel report provide?
   a. A list of rooms that is the output of the Location search selected as the report parameter.

5. True or False: Some Location reports are better in showing what is scheduled in a room, and others are better at showing what days and times are open in a room.
   a. True