Terms to know:

**Dashboard**: full R25 window
**Speed Book**: Icon for creating event in R25
**Quick Search**: upper left of dashboard
**History**: lower left of dashboard will show all events you’ve been in while logged in / will clear each time you log out
**Refresh**: Click on the CollegeNET logo
**F2**: displays all windows currently open

Booking Events in Workflow:

Open R25

Double click on (unread) to open your workflow
Hit [SEARCH] Double click on space to open the request

**TIP:** requests will be displayed in the order in which they were submitted to you. Bold red type means you have not opened/viewed the request, black you’ve opened/viewed but did not complete the booking. The ⏳ events are events that have been cancelled or changed by another scheduler. The black check mark means that someone in your group has completed the request.

<table>
<thead>
<tr>
<th>Task</th>
<th>Respond By</th>
<th>Event / Reservation Definition</th>
<th>First Date</th>
<th>Head Count</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>OSS 122</td>
<td>Jun 02 2010</td>
<td>Adv STEPS Camp - Art Class / Resr_377485</td>
<td>Jun 22 2010</td>
<td>15</td>
<td>2010-AANWM</td>
</tr>
<tr>
<td>OSS LL10</td>
<td>Jun 02 2010</td>
<td>Adv STEPS Camp - Art Lab / Resr_377487</td>
<td>Jun 22 2010</td>
<td>12</td>
<td>2010-AANWM</td>
</tr>
<tr>
<td>⏳ SWS-256</td>
<td>May 31, 2010</td>
<td>Adv STEPS—SWE</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Always work in the order event were submitted, or as they appear in your workflow.
When the event opens, this box will open automatically.

Just click the “X” to exit out of the screen.

This screen is used for clients with workflow notices that require action. An example would be Campus Life they need to approve the event request before the event can happen. These types of approval are done on this window only. You are booking a space so X out of the notice window.

Event will look something like this:
When booking remember to work top to bottom, working left to right

Make yourself the scheduler

Check Custom Attributes ** event description tab and attributes tab for approval information

Check for notes or set ups to scheduler here if white there is nothing listed here. CSS will do all timeline adjustments noted here, we cannot, however, add set ups until the space is assigned so we need you to look for set up notes to add once you assign your space(s).

Review the name: should be proper  (Event Planning Committee not Event planning committee)

Now work the bottom left to right

Check the space availability / book

Check for resources requested if any are showing in center window, select and assign

Review and add set up if any

Set state to confirmed

Save and close X

If you are looking for something in your workflow and need sorting options
Step by Step Instructions:

Make yourself the scheduler

1) Hit the scheduler bubbles
2) Click on scheduler to activate [Select]
3) Click on [Select]
4) Type the first 3 letters of your last name proper (capital, small)
   Hit enter on your keyboard or hit the go button
5) Select your name (double click to auto push to the add side) or hit add
6) Once your name is on the right click [OK]

Close the windows X
Checking Custom Attributes

Questions you may have on the event can also be found on the Description tab.

This area will tell you more about the event, if there will be music, is it sponsored, will UST Catering provide food.....
**Custom Attributes**  
Tabs defined

*Client description of what the event is will be entered here or displayed when entered in webviewer.*

*if pushed to you via webviewer requests the campus cabinet will display as well as any other selected by client or CSS*

*You can also set these for events you are speed booking*
This is where you would select the “do not display” option when cancelling a request for your client.
Currently we are not using the Requirements tab
Custom Attributes: View selected or Select an attribute for speed booked events here then [UPDATE] in upper right of window

Currently not using the Confirmation notice tab
Checking for notes or set ups to scheduler

**If there are set ups in this area you must add the Instructions to Event**
Scheduling Services cannot add set ups to events until the space is assigned.
Due to this space owners are to attach any set up needs to events when they book the space.

*White means no notes or set up needs:*

*Yellow means set up notes for event:*

Our sample here is yellow so we will check the notes to the scheduler by clicking on the icon

This will open the notes window for you to read what the requestor needs for this event. Here the client is asking for 30 minutes prior to set out brochures and center pieces and for 6 tables of 6 chairs to be delivered to room. Client and Physical Plant time will be added by CSS prior to pushing to your workflow, for speed booked events you will need to add these. (see photo on next page for proper display location for each need)

**You can also add any time that you may require as the space owner at this time as well.**

If there are table and chair changes to the space requested be sure to add minimum of 60 minutes to pre and post for PHP. Your needs, PHP needs and Catering needs will go in the Setup and Takedown area. Client needs will go in the Pre-event Time and Post-event Time area. (see photo)
The notes on the sample stated the client needed 30 minutes so let's add the 30 minutes.

Client's time for set up (decorate, materials etc)

PHP and Catering needs see chart for time

added 30 minutes * tab off the window
Adding the tables and chairs comes at the end so we will return to that when in the review modify view later. When working with or speedbooking events, remember the physical plant reports are delivered three days prior to events, if you are booking an event for Thursday on Monday or later you will need to inform PHP of the set up addition so it can be manually added to their reports.

<table>
<thead>
<tr>
<th>PHP SET UP REPORT SCHEDULE</th>
</tr>
</thead>
<tbody>
<tr>
<td>On Monday’s</td>
</tr>
<tr>
<td>On Tuesday’s</td>
</tr>
<tr>
<td>On Wednesday’s</td>
</tr>
<tr>
<td>On Thursday’s</td>
</tr>
<tr>
<td>Of Friday’s</td>
</tr>
</tbody>
</table>

*If you have a change or are making a change on behalf of another to an event that is on the day of the reports or after they’ve been delivered to the Physical Plant Staff you must:

- Enter in R25 / event as a record of what was actually used
  (for I want the same set up I had last year)

- Email **set up change** to:
  - Steve Uhls
  - Wes McCarty
  - Ronda M Neslon
  - Craig Bonine
  - Pat Quale,
  - **Cc**: the requestor

- If you receive a **diagram** of a set up always email these to:
  - Steve Uhls
  - Wes McCarty
  - Ronda M Neslon
  - Craig Bonine
  - Pat Quale
  - **Cc**: Kimm Thiboldeaux
Check the space availability / book

Click on the assign spaces icon on the bottom right

1. Check if there is a box for "starts with TMH".
2. Click on the check icon.

3. The space will show here.
   - If it looks like this, it is available.
   - If there is a black X over the green bar, it is not available.
   - If it just overlaps, adjust the time on the first tab to make the event fit.

4. If all good, hit the assign button. A blue box will appear on the date bar.
TIP:

When this displays on the right of the assignment window on the date Thu Nov 25 2010 it means there is a conflict with the date, due to a setting in the system. Here it is the Thanksgiving Holiday.

When this displays there is a conflict with the time, or another event booked in the space. Double click on this date to view the events in the space. Communicate with requestor the issue and adjust if possible to book the request or relocate.

** if the box is checked the space requested will not display in the assign side of the window and you will not be able to check what the conflict is. Nothing will display if this happens simply uncheck the box and hit [CHECK] again to get the to display for reviewing.
Check for resources requested

Click on the assign resources icon on the bottom right

NOTE: As resources cannot be assigned by IRT’s in their workflow until the space is assigned it is important to check this section and assign any resource that displays in the preferences folder / resource window (center). If you are speed booking you will add any needs known here; See SpeedBooking section.
Review and add set up if any

Click on the review modify icon on the bottom right

Make sure that the times are listed correctly, including any pre-event time, remember this sample needed 30 minutes to place brochures

If this is not displaying correctly return to the beginning and make the corrections to the time here. 
** you will need to go through assigning the space again as any changes here will unattach the space you’ve just assigned.

If there were notes regarding set up needs review them
Adding set up needs

Open notes or set ups to scheduler here if white there is nothing there

1) Click on the space name
2) Click on the date, then right click on the date
3) Select Edit Space Instructions:

Enter set up (sample asked for 6 tables of 6) Can copy and paste using keyboard controls
Highlight set up in notes to scheduler section [Ctrl] C for copy
click in the “Edit Space Instructions” window and [Ctrl] V for paste
Close window with the X
Note: If event has multiple dates and the setup is the same for each date of the event then you can copy and paste the instructions for each setup.

1. highlight the setup from notes
2. Copy the setup by holding down ‘ctrl’ and ‘c’ at the same time
3. Click first date and [Ctrl + Alt] keys and select last date
4. Right click – select “Edit Space Instructions”
5. Paste setup in ‘Edit space Instruction’ box by clicking in box then holding down ‘ctrl’ and ‘v’ at the same time

Set state to “confirmed”

Save and close

When you go back to your workflow screen and hit “search”
If you made changes this event will now have a red line through the event, or there is a check mark next to it, you can left/right click the event and select “Mark as read”. Then hit “search” again, and they will disappear.

Now you are ready to assign the next request in your workflow.
E-mailing from an event

When a space is not available, you have a question about the event, you will need to e-mail the requestor from the event in R25.

Click on the e-mail icon at the top left of the request.

A box like this appears:
The requestor will auto populate in the To: field

If you need to add another person you can do so by hitting the [Other…]

The search window will open, in the search type the first three letters of the last name proper
Select and add like you do for setting yourself as the scheduler.

You will automatically receive a copy of the email once it is sent **preference setting

Next you need to check the box in the [Attach:] window

Set the Include in Message Body to (none)

Click in the Message box and type your email to the requestor

*set signature in user preferences see next section*

Hit [Send]

** use your copy to monitor if you receive a response from the requestor.
Setting your signature line in R25:

Options>User Preferences>Email
Uncheck the copy self box if you do not wish to have an audit copy of emails you send. I do not recommend this as often you are communicating with requestors on issues with their request and this is a good way to monitor responses or back up your actions if there is an audit.
Working through your workflow

(Drafts) Campus Scheduling Services tech's only

Open for scheduling

once open correct name to proper format

"MBC Program Staff Training"

(Unread): requests for space

Black check means that another scheduler has scheduled the event. You can open to view to verify with your information or You can mark as read and refresh [Search!] to clear

Red circle with strikethrough means event has been canceled or remapped (when you adjust time)

All others you must open and address.
CANCELING REQUEST
WITH or W/O MULTIPLE DATES:

If your event has multiple tabs call Campus Scheduling Services for assistance.

Most will look like this and you can follow the steps below:

Here we have our event 2009-AANGHQ

(I had to use a space that I control but this will display your space(s) when you need to cancel an event.)
Note this sample has multiple dates:

** If you were only cancelling one date you would comment:
12/23/09 ket: cancelled 12/28 request as space is currently on hold for another event.
Now we will click on the event review / modify icon to ensure that only the one date was cancelled.

For one date or some within:

- Click on the space first.
- Click on the date you are cancelling, then right-click to get options, select cancel Occurrence.
Cancelling the entire request:

Setting Cancelled events to “Do Not Display on the Web” within the custom attributes.

Change state to “cancelled”

Save

Email client
Creating Event in R25
or
Speed booking

It is best practice to request other spaces within Webviewer to insure that all information is entered in the system needed for booked events. If you are requesting your own space here is how that would be done.

Open R25

Select new event icon

Name event
Select event type
If the type of event isn’t showing with the drop down arrow select other type
Should show in that listing.

TIP: what populates here are your favorite event types. This can be set in User Options as well. (Options, User, Events, Favorite Types tab) Caution not all are mapped in our application, if your event is filled out properly and you cannot save your speed book with an “cannot map to cabinet” message it is due to this. Maintenance / Repair is one of these.
Set the org and requestor

** note if you are doing this for another dept and/or person it should reflect their data not yours; the requestor is whose workflow it will appear in in webviewer.

Again these can be added like you add yourself as the scheduler in your unread requests sent to you. First type in the first three letters of the dept in proper format hit the red bubbles

Once you have the primary org selected the drop down arrow will display current linked employees to this department. If not showing you can also add the person in the same manner.

Set the requestor:

it is important that this is set to the name of the person you are speed booking the event for so that it appears in their workflow and on reports or is set to (myself) if it is your event. Events with (none) left in this field will not make reports for Physical Plant or Public Safety. Type the first three letters of the last name proper and hit the single bubble on the requestor line. Select the person from the list, add, [OK]
Complete Properties tabs

- Event description
- Categories if needed
- Custom Attributes if applicable

Let’s say your department head is having a staff meeting and doesn’t want it to be viewable to the general public or to the person they maybe meeting to discuss but you want the space to show that it is not available you will need to do this. Much like setting an appointment on your outlook calendar as private.

Open the Custom Attributes window by selecting 

2) go to the Categories Tab
3) scroll down to the Do Not Display on the Web / check the box
4) hit [select]
5) close window with the X
Set the time: remembering any PHP time in the Set up / Take down and any client time in the Pre and Post. ONLY THE ACTUAL EVENT TIME SHOULD BE LISTED IN THE EVENT TIME AREA.

Set the date(s): if more than one date I recommend using the ad hoc selection and scrolling through the calendar to add all the dates. They are viewable and you can auto skip holidays unlike setting every Tuesday options.

TIP:

- Click on year to get up / down arrows to jump to next year
- Click on month to jump months
Assign space:

Select assign icon to move to next page

Again, we move from left to right in the check for area:

check here to show all your favorites  or use the Starts with or preferences settings

enter number expected

hit [check]
Assign space(s):

---

Attach resources if needed:

Check the resource icon:

Open folder

Scroll down to select from listing of what you need if needed and assign

TIP: you can put the IRT folder in your favorites to make this faster. On dashboard select resources, search for the IRT resources, select all, add to favorites. Then when you need to attach IRT to an event you are speed booking you would open the favorites and the IRT resources will show, select and assign.

Add any set up or note: Set up to follow or NO SET UP NEEDED

Review the booking on the review tab that all data is correct

save event
Since you are creating this event you will need to select the folder to store the event in. Your two options will be:

**SP Internal Events** folder is used if your event is happening in a SP campus space.

**MPLS Internal Events** will be used if your event is happening in a MPLS campus space.

** sponsored events go here as well – call me and I’ll assist in how to set your event to a sponsored event if that is the case.

SP External is only used by Dan Taylor
MPLS External is only used by Marti King

SP Student Club and Organization is only used by Campus Scheduling Services
MPLS Student Club and Organization is only used by Campus Scheduling Services

*If you select the wrong cabinet here and save please email me so that I can fix.*

Now you can check the space that the event is there if you want by selecting the space on your dashboard under spaces by clicking the favorite space and going to the date of the event.
Setting Event Type Preferences

Open R 25
Select “options”
Select “preferences”

Double click on events folder

Select the type you want
Hit add to favorites (2)
When all done say ok (3)
These will now appear in your speed book at this section.
Adding Favorite Spaces

Click on the “spaces” section of R25:
In the “quick search” section, type in the building code for which you have a preferred space. For example, if I want to make the meeting spaces in Murray-Herrick my favorites, I will type in MHC. Click Search. Select the space you would like to add, and click the star at the top of the screen:
How to search for an event

Copy and paste (Ctrl C / Ctrl V) reference number from the email line

From: Prince-Black, Sandra L.
Sent: Thursday, May 20, 2010 1:42 PM
To: Witte, Brian M.
Subject: RE: R25: ABPMP Minnesota Chapter [2010-AANWDD]

Brian,

Hit go:
**Tips to Remember**

- If this is clear all good
- If this is yellow there are set notes here either from another scheduler or set up need if you see set up requests (tables, AV needs) let me know and I will either show you how and where to drop them or I will put them in the correct area.

Can use "Ctrl C" and "Ctrl V" for copy and paste within R25

**Sorting your workflows:**

First square will sort all your checks and completes to the top or bottom to quickly clear your workflow “First Date” will sort in chronological order to address the closest date(s) immediately Always resort after working on this week to submitted order by selecting the Reference column.

After booking an event with multiple dates; hit “search” to refresh your workflow and locate next event that needs to be booked. This will place the check mark in front of the other events attached and booked from the first date booking. This way you aren’t opening events that you’ve already addressed.

will minimize all windows open on your desktop and bring you to your desktop with one click. Simply hit the option in the tray when you want to return to an open document / program.
ASSIGNING TASKS:
If you are interested in using this function please schedule one on one meeting with Kimm Thiboldeaux to review

You can also assign tasks in events. Let’s say you are speed booking an event for your department in your space. You are the event coordinator for this event. This event is 6 months out and you will need to get the set up needs from Julie but she is out of the office, and you need to order flowers … Your vendors will not take requests 6 months in advance. You can put reminders in your workflow so that don’t need to do an Outlook reminder.

Here is how to do this:

In the event select the workflow icon 

This will open the task window on the To Do tab
Select New
Name the task
Assign the task to (here we need the set up from Julie so I set it to her using the bubble)
Set due date (date I need it done- this is also the date that the task will appear in the assigned persons workflow..much like an outlook reminder)
comments (tell person what you need -to Julie on the task I’m assigning her- or note to yourself)
OK

My remainder to order flowers will look like this.

Order 6 centerpieces and one Buffet arrangement
Task window in the event in R25 will now appear like this:

![Task window example](image)

When Julie logs into webviewer and her workflow will now have a task assigned to her as she is not a Scheduler / R25 user these will appear in her workflow in webviewer. **the persons you assign tasks to must know you are using this option and are checking this daily for new tasks.**
Julie can read the task and note the date and return at the appropriate time. The task will remain in her workflow until she completes the task and hits the complete button.

Once she completes the task she will hit the completed button and the event will now display in R25, in the event, on the task list like this… it is completed (black check)

Your task can be found in R25 and will look like this:
If you cancel the event or an event that you've been assigned a task in cancels you will be notified in your unread:

You will have to search out any future events as this will not populate to your outstandings until the respond date (Oct 15 here)

You will also have to complete your task in your workflow to clear the event.

You can set searches for your R25 Dashboard for tasks assigned to you, tasks assigned by you to others to monitor these assignments as well.
Tasks will appear in 25Live like this:

<table>
<thead>
<tr>
<th>Task Name</th>
<th>Status</th>
<th>Respond By</th>
<th>First Date</th>
<th>Event Name</th>
<th>Reference</th>
<th>Assigned By</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email reminder to guests</td>
<td>In</td>
<td></td>
<td>Aug 12 2010</td>
<td>R2S Spaciousness Brown Bag</td>
<td>2010-AADCA41</td>
<td>Thibodeaux, Kimm E.</td>
<td>with outlook calendar meeting request</td>
</tr>
<tr>
<td>Tech Assist review</td>
<td>In</td>
<td></td>
<td>Aug 09 2010</td>
<td>R2S Spaciousness Brown Bag</td>
<td>2010-AADCA44</td>
<td>Thibodeaux, Kimm E.</td>
<td>Schedule time with Nick on remote to my pc from 104 for training session with projection on screens</td>
</tr>
<tr>
<td>Order Catering</td>
<td>In</td>
<td></td>
<td>Aug 09 2010</td>
<td>R2S Spaciousness Brown Bag</td>
<td>2010-AADCA44</td>
<td>Thibodeaux, Kimm E.</td>
<td></td>
</tr>
<tr>
<td>OWS L54</td>
<td>In</td>
<td></td>
<td>Jul 19 2010</td>
<td>National ASQ Exams</td>
<td>2010-AANZYM</td>
<td>Kubal, Jadzi K.</td>
<td></td>
</tr>
<tr>
<td>OWS 275</td>
<td>In</td>
<td></td>
<td>Jul 19 2010</td>
<td>National ASQ Exams</td>
<td>2010-AANZYS</td>
<td>Kubal, Jadzi K.</td>
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<tr>
<td>BEC L17</td>
<td>In</td>
<td></td>
<td>Jul 19 2010</td>
<td>National ASQ Exams</td>
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<td>BEC L15</td>
<td>In</td>
<td></td>
<td>Jul 19 2010</td>
<td>National ASQ Exams</td>
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<tr>
<td>BEC LL03</td>
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<td>Jul 19 2010</td>
<td>National ASQ Exams</td>
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<td>Kubal, Jadzi K.</td>
<td></td>
</tr>
<tr>
<td>OWS L54</td>
<td>In</td>
<td></td>
<td>Jul 19 2010</td>
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