Using Optimizer Effective Dating in 25Live

> 🔒 **Security Note:**
>
> Users must have **Academic Options**: 4.0 *Use the Schedule25 Optimizer and the Meeting Pattern Grid* set to **Yes** in Series25 Group Administration to access Optimizer Effective Dating. Additionally, your institution must license the Schedule25 Optimizer.

The Effective Dating feature in 25Live allows you to automate some location changes for use with the Schedule25 Optimizer. These changes will not edit the location's data in 25Live and will not be used in other features, such as the Event Form or searches.

> ✅ **Tip: This Feature is Best for Temporary Changes for Optimizer Runs**
>
> Changes made with this feature are meant to be temporary and only affect Schedule25 Optimizer runs. When changes occur and affect a location long-term or permanently, you should update the location in the 25Live location detail view, then remove the related effective date change.

As conditions or circumstances on campuses change, you're able to easily schedule:

- Adding a feature
  - *Example:* A room will be undergoing renovations and will become ADA accessible for the Spring term.

- Removing a feature
  - *Example:* Chalkboards will be removed from several rooms over the Summer.

- Update the fill ratio
  - *Example:* If a 100-person lecture hall has been recently renovated and is in high demand, the fill ratio for the room can be adjusted from 0.50 to 0.85 for the Fall term when large sections are more likely to be scheduled to not impact the placement of larger classes that really need the room.

- Update a partition
  - *Example:* A room will be outfitted with technology that will make it desirable for the Engineering department, so it can be moved to the Engineering partition when those renovations are scheduled to be complete.

- Update the capacity
  - *Example:* There is a global pandemic that temporarily results in a lower seating capacity for rooms, but scheduling is taking place for future terms that will require more typical capacity be used by the Optimizer.

The Schedule25 Optimizer will prepare data based on your scheduled changes on the effective date for any applicable run in the optimization step.

## How to Add an Optimizer Effective Dating Change

1. Open the More Menu

After logging into 25Live as a user with appropriate permissions, open the **More** menu in the top navigation bar.
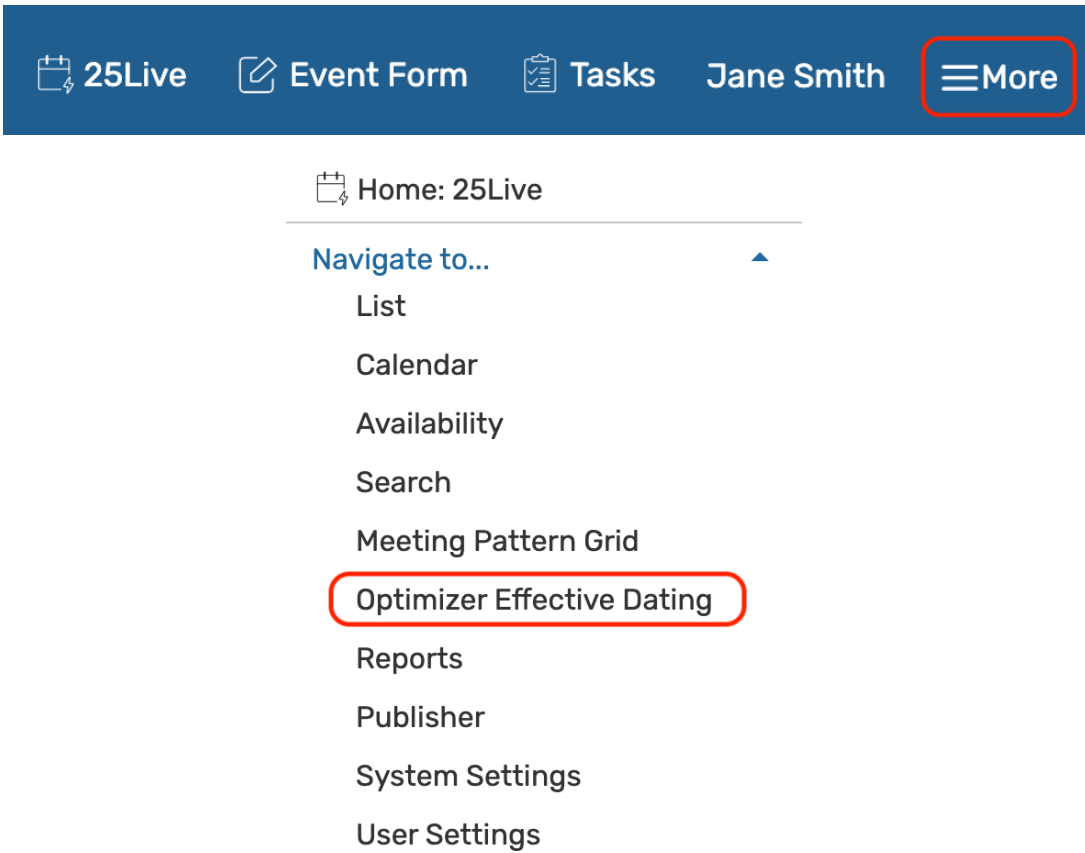
Use the menu link to go to the **Optimizer Effecting Dating** section.

2. Review Current Items, Then Use the Add Button

Image: Add buttons are located above and below the table of your current effective dating items.
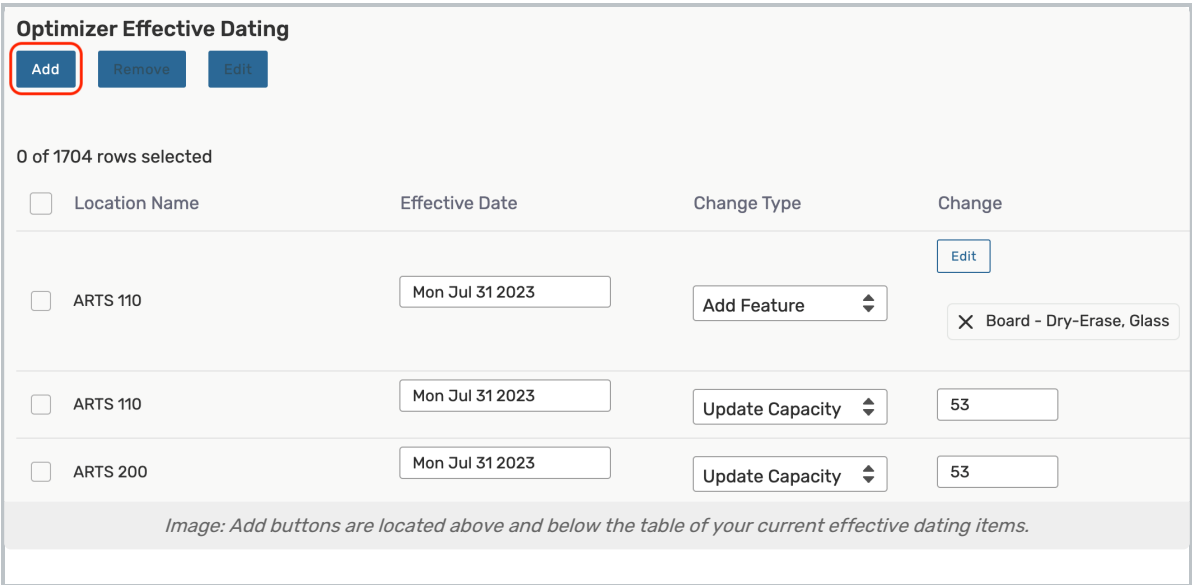
A table displays your currently scheduled items, including items with effective dates in the past. Review these items to be sure you're not duplicating a previously added item. The labeled table columns can be tapped or clicked to sort the table by each column.

Use the **Add** button to display the location search.

3. Choose One or More Locations

Under the **Add Locations** heading, use the **Select Locations** button.

Locations

ARTS 105	★ Only Favorites ✓ Select All ✗ Select None

☑ **ARTS 105**
Davis Arts Center - Practice Room 5 –
– Cap: 2

Done

Image: Use the search to locate one or more locations. Then, use the checkboxes to make selections.

Type to search using the **Locations** field. 25Live will search as you type to narrow the results. Standard 25Live options are available to apply filters that will narrow the results, to show **Only Favorites**, **Select All**, or reset the checkboxes with **Select None**.

If you select more than one location, they will display as separate line items in the table. You may also add a location more than once to make more than one change to a location. You may not enter two or more rows for Update Fill Ratio, Update Partition, and/or Update Capacity for the same effective date.

Use the **Done** button to add the items.

4. Adjust the Item's Options

Add Optimizer Effective Dating   ✕

Add Locations

Select Locations

✕   ARTS 105

Effective Date

Tue Apr 02 2024

Add Feature
✓ Remove Feature
Update Fill Ratio
Update Partition
Update Capacity

Update Optimizer Effective Dating

Close

Image: Choose the Change Type from the dropdown.

Once you add a location, on each line you may edit the **Effective Date**, select a **Change Type**, and complete options for each **Change**.

Edits are automatically saved after closing additional selection displays.

Editing the Effective Date

Effective Date

Tue Apr 02 2024

< | Apr ⇕ | 2024 ⇕ | >

Mo	Tu	We	Th	Fr	Sa	Su
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	1	2	3	4	5
6	7	8	9	10	11	12

Image: You can edit the date by tapping or clicking in the date field

25Live will add a default date. If you wish to edit the date, tap or click in the date's field to choose a different date.

✓ **Tip: Consistency Pays Off**

Effective date data changes are cumulative, so be consistent in how you create your dates and data changes. You may not enter two or more rows for Update Fill Ratio, Update Partition, and/or Update Capacity for the same effective date.

Choosing and Editing the Feature Change Types

Image: After choosing to add or remove a feature, you may select features in the modal display.
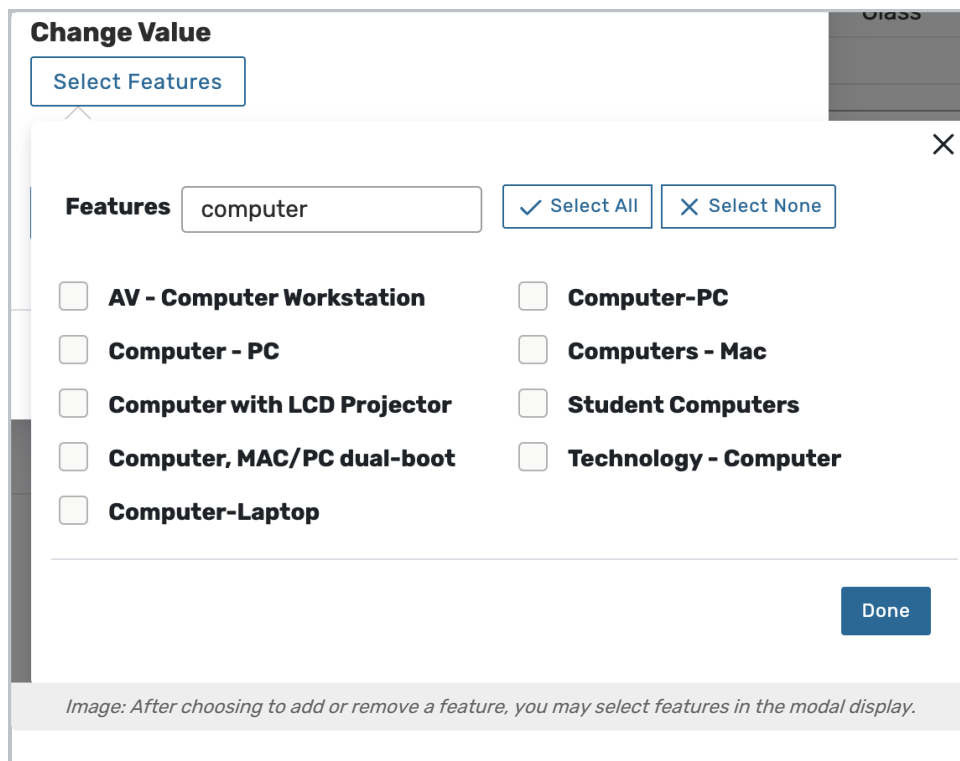
Use the **Select Features** button to open the display where you may select one or more features. Check the boxes next to features you'd like to add or remove, then use the **Done** button to save your choices.

Choosing and Editing the Fill Ratio Change Type

Image: The Fill Ratio choice will display a numeric field with arrows to adjust.
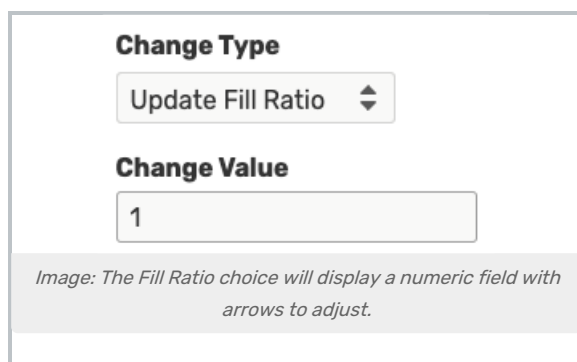
After selecting **Update Fill Ratio** from the **Change Type** dropdown menu, you can edit the numeric field in the **Change Value** field by typing a positive number or using the arrows to adjust the number up or down.

Choosing and Editing the Partition Change Type

*Image: Choose from a dropdown list of partitions.*
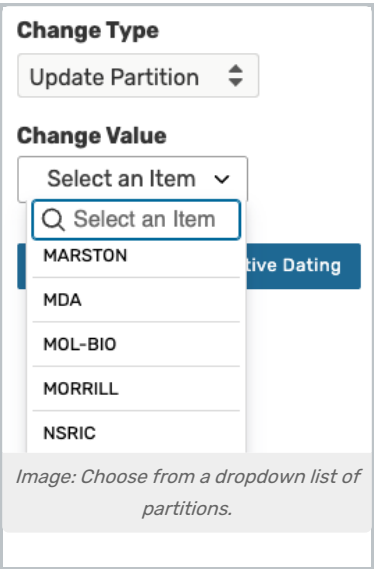
Select **Update Partition** from the **Change Type** dropdown menu. Then, use the **Change Value** dropdown menu to select from available partitions.

Choosing and Editing the Capacity Change Type

After selecting **Update Capacity** from the **Change Type** dropdown menu, you can edit the numeric field in the **Change Value** field by typing a positive number or using the arrows to adjust the number up or down.

5. Save Your Changes, and Return to the List

Image: A success message displays after using the Update Optimizer Effective Dating button.
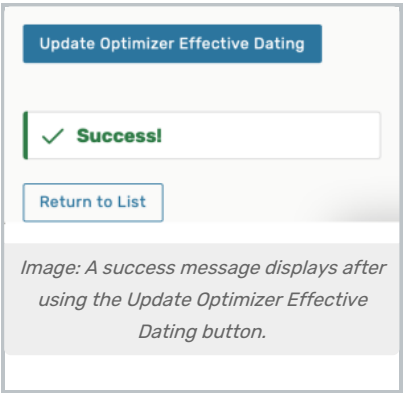
After setting up your change, use the **Update Optimizer Effective Dating** button to save your change. A success message will appear. You can then use the **Return to List** button.

How to Edit Optimizer Effective Dating Changes

> ✓ **Tip: Selecting Multiple Rows to Edit**
>
> In addition to the method outlined below for editing individual items, you may also check more than one row then use the **Edit** button to enter the edit view. However, if you select items that are not of the same type, you will edit and change them all to be of the type of the first item checked in the group.
>
> *Example: if you check an Add Feature item then an Update Capacity item and use the Edit button, both*

items will be edited to be of the Add Feature type.

Image: The Change Type and Change columns are used for editing.

1. Confirm or Select the Change Type

If you wish to alter the **Change Type** for any item, use the dropdown menu in that column.

2. Edit the Change Column

If a numeric change is on the item (such as Update Fill Ratio or Update Capacity), you can edit the numeric field in the **Change** column by typing a positive number or using the arrows to adjust the number up or down.

For other types, use the **EDIT** link to open selection views. You may also use the **X** button on any item to remove only that item from the change line.

How to Remove an Optimizer Effective Dating Change

1. Navigate to the Optimizer Effecting Dating Section

Just as you would when adding a change item, use the **More** menu to go to the **Optimizer Effecting Dating** section.

2. Check Box(es) For Item(s) To Be Removed

Image: Check the box next to any item you wish to remove, then use the Remove button.

⚠️ **Warning: Removal Is Immediate and Not Reversible**

Consider your action before using the Remove button. You will not be warned or given a chance to cancel your action. The removal of the item(s) will happen immediately, and there is no undo function.

Use the checkboxes in the left column of the table to check one or more items you wish to remove. You can also use the checkbox in the table header to select all items. Again, use caution to only select those items you wish to remove, and visually confirm before continuing.

Use either the **Remove** button above or below the table. The items will disappear immediately.