

Functional Administration Retraining

Last Modified on 08/29/2022 1:01 pm PDT



Note: Also Available as a Remote Course

This and many other training opportunities are available as either in-person or remote training sessions.

Goal

Retrain the institution on a production-level 25Live environment to accommodate staff turnover and other effects of time

Description

A CollegeNET consultant travels onsite and works directly with up to 12 campus staff members for three (3) days. The purpose of the visit is to provide an overview of 25Live use and administration to existing or new functional administrators. Training includes an overview of 25Live master definitions, the event hierarchy, object data (locations, resources, organizations and contacts), security settings (Functional Level Security, Object Security, and Assignment Policy) within the Series25 Group Administration tool, system and event form settings via the 25Live System Settings, and user training and reporting in 25Live.

In preparation for the onsite visit, the consultant reviews the customer's current 25Live data and data structures. During the onsite visit, consultant may recommend changes to the currently implemented data and structures in 25Live to conform to best practices. Implementation of these recommendations is the responsibility of the customer following the onsite service.

The following topics are covered during the service:

- Administrative Content:
 - Create and maintain master definitions on Location, Resource, Organization, Contact and Event records
 - Create and maintain 25Live security groups and Functional Level Security
 - Create and maintain Assignment Policy for Locations and Resources
 - Create and maintain Object Level Security on Locations, Resources, Organizations, Reports, Cabinets, Folders and Events
 - Configure and set up Notification Policy on appropriate objects
- Series25 Configuration:
 - Customizing the Event Form based on security group and set security group defaults including date buffers
 - Setting system defaults
 - Understanding how to set up and maintain the Viewer Seat and Public Search user
- Navigate 25Live
 - Create simple and complex events

- Combine related events
- Assign spaces and resources to events
- Perform searches
- Personalize the user interface
- Participate in Tasks
- Administrative System Settings
- Generate Reports (time permitting)

Intended Audience

New or existing Functional Administrators that want a better understanding of 25Live setup at their institution.

Schedule

The consultant leads onsite meetings on three (3) consecutive business days, with dates to be determined. Meetings typically last from 9:00 AM to 4:00 PM with a one hour break for lunch. Prior to the delivery of the service, the CollegeNET consultant will review and assess the existing 25Live configurations.

Prerequisites

Customer provides the following resources to CollegeNET:

- All implementation team members must be assigned and staffed prior to the service delivery.
- Access to all Series25 solutions.
- Ability to log in to Series25 using an administrative account.
- Facilitated access to the Customer's student information system as needed.
- Access to training/conference room with data projection capabilities (available to both Customer Series25 installation and the consultant's computer).
- For onsite services, CollegeNET Trainer will need Whiteboard and Markers and internet access.