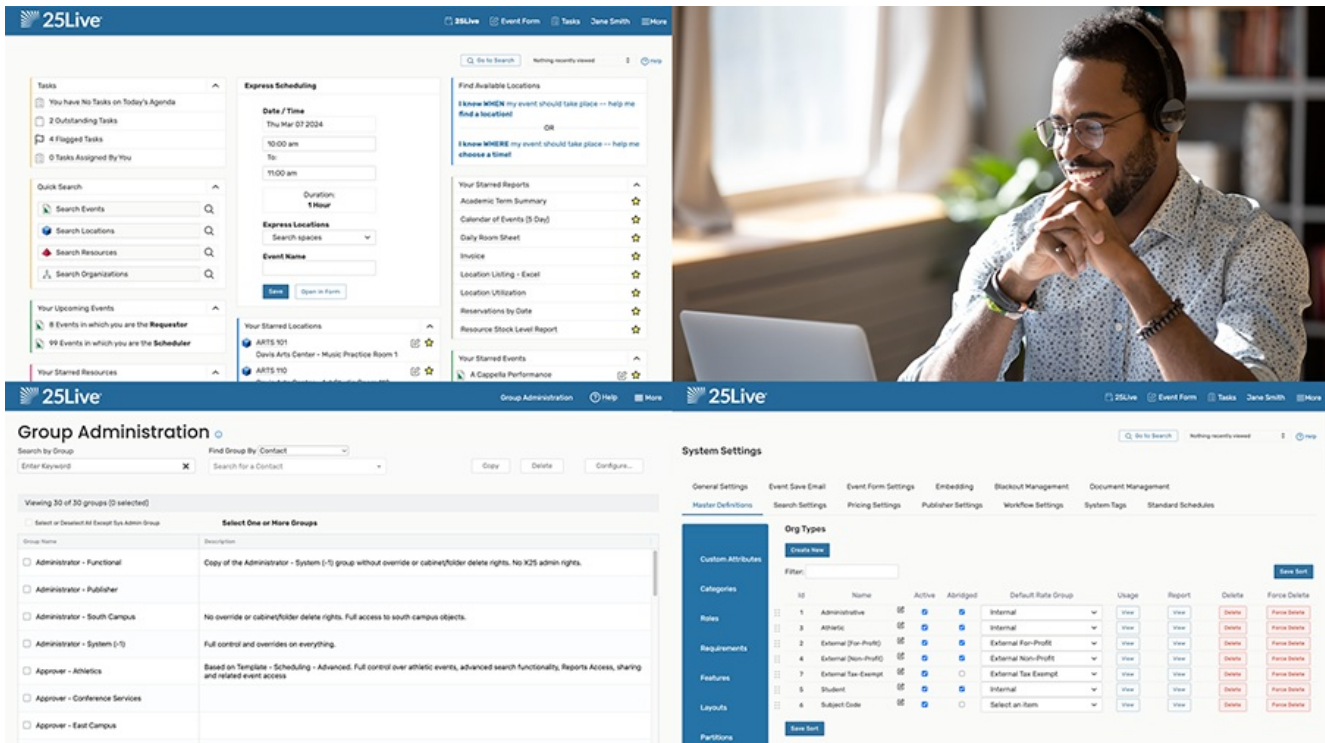# Custom Consulting Service

Goal

To provide a 3-day service that allows customers to mix and match for their needs. This is meant to be an on-site service only and the topics chosen should cover a total of 3 days. Anything that falls outside of the pre-defined topics will need to be submitted in writing and approved by your Account Manager.

Cost

Contact series25implementation@collegenet.com for pricing.

Customer Provided Resources

Customer provides the following resources to CollegeNET:

- Access to all Series25 product installations (e.g., 25Live, Schedule25 Optimizer, WebServices, Interfaces, etc)
- Computer Workstations with Series25 access for all training participants
- Internet Access and/or guest access to Customer campus wireless network.
- Ability to login to Series25 using an Administrative account
- A training/conference room with data projection capabilities (available to both Customer Series25 installation and the consultant's computer).
- Whiteboard and Markers.

Training Options Available

Schedule25 Optimizer

Total Time: 1 day

Description: The Schedule25 Optimizer session shows academic schedulers how to prepare and run Optimizer in their 25Live environment. Participants learn to analyze results and troubleshoot errors.

Content Covered:

- Creating event and location searches
- Setting Schedule25 Optimizer defaults
- Setup of partitions, organizations, and location features
- Running the Optimizer
- Analyzing Results
- Troubleshooting common errors

Prerequisites: Academic term data must be imported successfully into 25Live without import errors.

Academic Cycle - LYNX

Total Time: 1 day

Description: The Academic Cycle session teaches academic administrators how to prepare data in the Student Information System (SIS) and 25Live environments for interface operations. Participants learn to configure and create data sets, troubleshoot import/export messages, prepare for using Schedule25 Optimizer and import room assignments back into the SIS.

Content Covered:

- Prepare Academic Data in the SIS for Export
- Prepare Series25 to accept data from SIS
- Understand the cabinet/folder hierarchy as it relates to academics
- Create datasets in LYNX for export
- Review data translations
- Prepare Data for Schedule25 Optimizer

Prerequisites: The LYNX interface must be installed and tested by Support prior to the service. We recommend users already have the ability to navigate 25Live

25Live User Training

Total Time: 1 day

Description: The 25Live User training session covers a broad range of topics including 25Live navigation, event

creation, location assignment, complex event scheduling, and task management.

Content Covered:

- Navigate 25Live
- Create simple and complex events
- Copy events
- Combine related events
- Assign spaces and resources to events
- Perform searches
- Generate reports
- Personalize the user interface
- Participate in Tasks

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data.

Security

Total Time: 1 day

Description: The 25Live Security session explores best practices for setting up Functional Level Security, Assignment Policy, and Object Level Security in your Series25 environment. Participants also explores administrative and end-user considerations important for setting up tasks for use in 25Live.

Content Covered:

- 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

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data. Functional Administrator level access required.

Administration and Configuration

Total Time: 1.5 days

Description: The Administration and Configuration session explores best practices for setting up master definitions, data records, Functional Level Security, Assignment Policy, and Object Level Security within 25Live and Series25 Group Administration. Participants also explore administrative and end-user considerations important for setting up tasks for use in 25Live.

Content Covered:

- Navigate the 25Live System Settings

- Understand Dashboard and directory tabs

- 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

- Complete various tasks within 25Live application

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data. Functional Administrator level access required.

Tasks

Total Time: 0.5 day

Description: The tasks session explores administrative and end-user considerations important for setting up Tasks for use in 25Live.

Content Covered:

- Setup Assignment Policy on Locations and Resources

- Setup Notification Policy on Locations, Resources, Event Types, Event Requirements and Organizations

- Understand best practices when deciding to user Assignment Policy or Notification Policy

- Understand how to complete various tasks generated within the 25Live application using the Tasks tab

- Create impromptu tasks - To Do's

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data. Functional Administrator level access required.

Configuring 25Live and Event Forms

Total Time: 0.5 day

Description: Participants explore administrative and end-user considerations important for any 25Live implementation. The training covers streamlining master definitions with the use of abridged lists, customizing event forms, limiting access to event states, types, and scheduling/requesting date ranges based on security group.

Content Covered:

- 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

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data. System Administrator level access required.

Pricing

Total Time: 1.0 day

Description: The Pricing session explores how to set up, test, and generate event pricing within 25Live.

Content Covered:

- Define rate groups
- Attach rate groups to organization types
- Create tax schedules
- Create rate schedules for event types, resources, requirements, and spaces/locations
- Build basic pricing formulas
- Review and revise event pricing
- Generate event pricing summary and event invoice for single and related events

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample data. Functional Administrator level access required.

Assumptions: Users should be familiar with how their campus charges for the use of spaces and resources and will come prepared with a few examples. This is not meant to set up their pricing for them but to give them the skills needed to set the pricing piece up for themselves. If they need more assistance, a more robust remote service should be purchased.

Publisher

Total Time: 1 day

Description: The publisher session covers web publishing functionality, basic security setup for publisher users, creating and maintaining search feeds, and customizing the web publishing interface. Additional discussions include determining how best to build feeds for major campus calendars. Advanced techniques for dealing with mobile versions as well as how to build a template stylesheet to increase efficiencies in building new calendars for campus websites are explored.

 Content Covered:

- Build effective and efficient searches in 25Live that will become 25Live Publisher event feeds
- Create, manage, modify, and remove event feeds to 25Live Publisher
- Select appropriate Publisher calendar formats and controls
- Generate embeddable publishing code
- Build a Publisher stylesheet calendar template to contain all commonly used calendar, control, and promotional spuds and their associated style settings for future use in building 25Live Publisher calendars quicker and more efficiently
- Understand and make use of the concept of mixed-in calendars
- Be able to use instructor-provided instructions to enable mobile device recognition for mobile calendar provision to websites

Prerequisites: An operational 25Live environment on a supported version containing customer or CollegeNET Sample event data. Functional Administrator level access required.

Assumptions: This service is meant to train users how to move forward with the creation of robust calendars. Users should come prepared with the types of calendars that are either existing or that they want to set up so we can create examples. If more assistance is needed then a more robust service should be purchased.

Basic JReport Training

Total Time: 1 day

Description: The Basic JReport session introduces users to custom reporting in 25Live. Navigation of the Designer, making simple edits to standard reports and testing modifications within 25Live will be covered.

Content Covered:

- Install the JReport Designer and maintain the catalog file of reports
- Edit existing standard reports to change color, logo, text and more
- Upload and test modified reports in 25Live to ensure they are accurate

Prerequisites: Class participants should have a technical background and have familiarity with running standard reports in 25Live including search creation.