



25Live Pro

Reports

Before You Can Run A Report, You Must First Create, Save, And Star A Search

Q Your Starred Location Searches

- Arts Annex
- Butler
- Candelaria
- Crabbe Hall
- Frasier
- GRAY
- Guggenheim

Searches

You can search for and Star:

- Events
- Locations
- Resources
- Organizations

Q Your Starred Event Searches

- Spring 2019
- Spring 2019-Missing Location
- Summer 2019 Not Placed

Q Your Starred Resource Searches

- Notification Facilities
- Unlock/Lock Facility-By FM

Create Searches for Standard Reports

25Live Pro users can create searches to specify exactly which data (that is, which events, organizations, locations, and resources) they want to appear in the report the user is generating. 25Live Pro users can print reports or export and save reports in various file formats including PDF, Excel, Rick Text (RTF, Word), HTML, and plain text.

For Example: To Search for the criteria to list all the rooms and their attributes for Gunter Hall, you would perform a Search for Keyword "GUNT". That search will populate as shown. Hit the "Save As" button. (Note: the following is just a snapshot of part of the report that will generate.)

Name	Formal Name	Categories	Features	Layouts	Max Capacity
GUNT 0010	GUNTER 0010-NonS25-Dedicated ASLS Lab	Specialized Dedicated, Code-S, Gunter Hall, Laboratory, Non S25 Facilities, Projector Room	Access-Cairt, Boards-White-Fixed, CD Player, Computers-Instructor, Computers-Student, Floor-Carpet, Lighting-Controllable, Outlets, Projector Room, Projector-Overhead, Projector-Video Data, Room Type-Lab, Screen-Data Projection, Seating-Moveable Seating, Seating-Tables and Chairs, Speakers, Updated		16
GUNT 0240	GUNT 0240-NonS25-ASLS Faculty Office	Code-O, Gunter Hall, Non S25 Facilities	Room Type-Office		3
GUNT 0250	GUNT 0250-NonS25-CLINIC CLSSRM	Code-S, Gunter Hall, Laboratory, Non S25 Facilities			10
GUNT 0270	GUNT 0270-NonS25-ASLS Faculty Office	Code-O, Gunter Hall, Non S25 Facilities	Room Type-Office		3
GUNT 0480	GUNT 0480-NonS25-ASLS Lab	Code-S, Gunter Hall, Laboratory, Non S25 Facilities	Access-Key Locked, Boards-Chalk-Fixed, Floor-Carpet, Lighting-Controllable, Outlets, Room Type-Lab, Seating-Tables and Chairs, Updated		12

Name your search, mark the "Yes" to "Add as a Starred Search", and then hit "Save".

Save Search

Search Name:

Add to starred searches: No Yes

Cancel Save

You will have to refresh your browser to get the starred search to show up on your Dashboard.

Create Standard Reports

25Live Pro

Event Form

Tasks

More

From the 25Live Pro Header, click on the “More” Drop-down. Select “Reports”.

The Reports page will appear. Reports are organized into five sub-tabs: Your Starred Reports, Event reports, Location Reports, Resource Reports and Other Reports:

The screenshot shows the top of the 25Live Pro interface. On the left is the 25Live logo. Below it is a search bar labeled "Filter By Report Name here" with a "Go" button. To the right is a vertical navigation menu with five expandable sections: "Your Starred Reports", "Event Reports", "Location Reports", "Resource Reports", and "Other Reports".

The screenshot shows the "More" dropdown menu. It includes a close button (X) at the top right. Below is a search bar with "Home: 25Live Pro". A "Navigate to..." section lists several options: List, Calendar, Availability, Search, Reports (highlighted with a red box), Publisher, and 25Live Scheduling. Below this are "Preferences" and "About" sections, each with a dropdown arrow. At the bottom, there is a "Carri Bloomer" section with a "Sign Out" button.

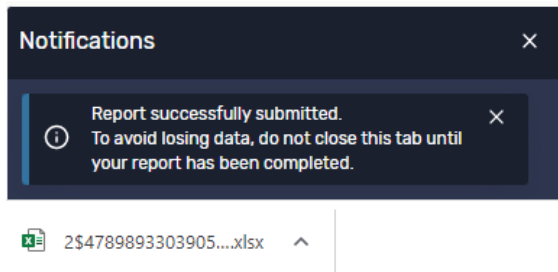
From those tabs, choose the type of report you want to run from the drop-down selection. There are hundreds of standard reports you can run from these tabs.

After a report is selected, provide any information or parameters the system requests. If you would like to preview how the report will appear or to make sure the report you have chosen will give you the type of information you require, you can view a sample of the report by clicking on the “View Sample” link.

The screenshot shows the configuration page for the "Daily Room Sheet" report. On the left is a navigation menu with "Location Reports" expanded, showing a list of report types including "Daily Room Sheet". The main content area has a title "Daily Room Sheet" with a star icon and a "View Sample" link (indicated by a red arrow). Below the title are two required dropdown menus: "Format Option - Required" and "Delivery Option - Required". Underneath is a "Report Parameters" section with a "Report Date - Required" field set to "Thu Jul/28/2022", a "Location Search - Required" dropdown, and a "Hide Unused Locations" section with radio buttons for "Yes" and "No" (the "No" option is selected). A "Run Report" button is located at the bottom right.

Please remember that the event or location search that you will choose comes from previously saved & starred searches in your 25Live Pro environment.

After you click on “Run Report”, a Notifications window will open to let you know you have successfully submitted a report, and a thumb file will eventually appear under the notification.



If you have trouble with this, try turning off your pop-up blocker.

Open the link, and the data can now be viewed in whatever format you have chosen. 

For more advanced reports, save and star advanced searches. Most departments have their own search criteria that they can share with you. If you need help with advanced searches please email 25LiveHelp@unco.edu.

Wednesday, Feb 27 2019

GUNT 1140

Event Times	Event
9:05 AM - 9:55 AM	SES 440 003 MMP 20294, MWF 0905-0955
2:30 PM - 3:20 PM	ASLS 594 001 20028, W 1430-1520
4:00 PM - 6:50 PM	RTH 452 001 21688, W 1600-1850

TIP: To get back to the 25Live Pro environment from the Reports page, go to the “More” drop-down then in the “Go to Tool” drop down pick “25Live Pro”.

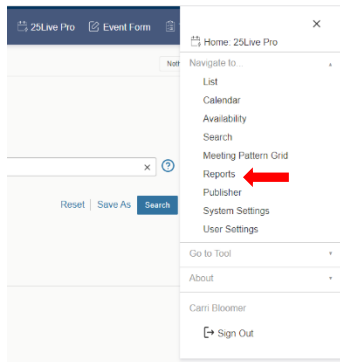
Scheduled Reports

Several reports have been converted by CollegeNet to a format that allows them to be generated and emailed out automatically on a schedule.

Here is a standard list of reports that have Interactive capabilities:

- Calendar of Events 3 Day
- Calendar of Events 5 Day
- Calendar of Events 7 Day
- Contact Directory
- Contacts by Organization
- Customer Master Definitions
- Daily Events
- Daily Room Sheet
- Daily Room Sheet per Room
- Daily Setup by Location
- Daily Setup Report
- Drafts Report
- Duplicate Contact Candidates
- Event Checklist
- Event Confirmation Detailed
- Event Confirmation (Detailed) Estimate
- Event Confirmation (Related) Estimate
- Event Confirmation (Academic)
- Event Confirmation (Detailed)
- Event Confirmation (Related)
- Event Invoice
- Event Invoice (Related)
- Event Listing
- Event Location Monthly Calendar
- Event Master Definitions
- Events by Organization Type
- Layouts by Location
- Location Availability Grid Daily
- Location Inventory
- Location Listing
- Location Listing by Scheduler
- Location Master Definitions
- Location Monthly Calendar
- Location Unlock-Lock Times
- Location Unlock-Lock (3 Day)
- Locations by Campus Partition
- Locations by Category
- Locations by Layout
- Organization Listing
- Organization Partition Preferences
- Pricing Master Definitions
- Requirement and Resource Daily Setup
- Reservations by Date
- Resource Master Definitions
- User List by Security Group

Again, start out by using the More drop-down to select Reports:



Once in the Reports screen, please follow these CollegeNet instructions to set up scheduled reports:

Getting To Reports Admin

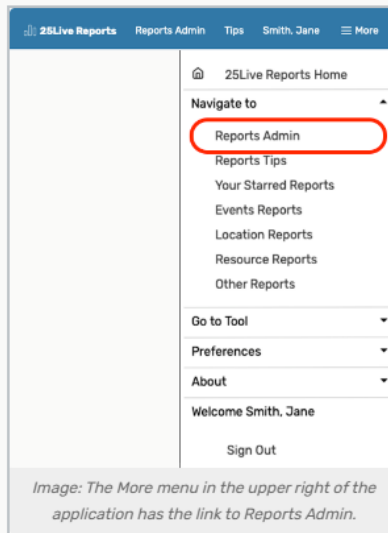


Image: The More menu in the upper right of the application has the link to Reports Admin.

Go to the Reports Administration area in the **More** menu. Use the **Navigate to** link to reveal options, then choose **Reports Admin**.

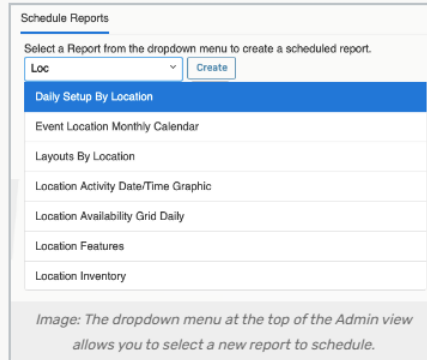
When you wish to return to the main reports view, use the "**Reports Main Page**" link.

After clicking on the "Reports Admin." button, if you see this next screen that suggests you do not have access to that report. Please just click on "Schedule Report" to advance to the next screen:



How to Create a New Scheduled Report

1. Select a Report



Schedule Reports

Select a Report from the dropdown menu to create a scheduled report.

Loc

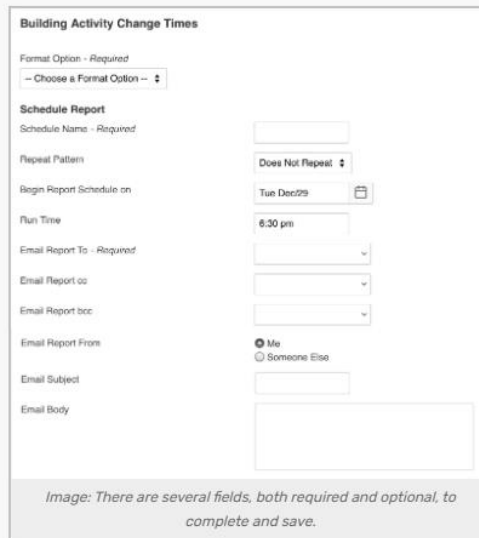
- Daily Setup By Location
- Event Location Monthly Calendar
- Layouts By Location
- Location Activity Date/Time Graphic
- Location Availability Grid Daily
- Location Features
- Location Inventory

Image: The dropdown menu at the top of the Admin view allows you to select a new report to schedule.

Select the report you want to schedule from the dropdown menu. You can type to filter by name in order to choose from a smaller list.

Use the **Create** button to complete scheduled information fields.

2. Complete Format, Schedule, and Parameters Fields



Building Activity Change Times

Format Option - Required
-- Choose a Format Option --

Schedule Report

Schedule Name - Required

Repeat Pattern Does Not Repeat

Begin Report Schedule on

Run Time

Email Report To - Required

Email Report cc

Email Report bcc

Email Report From Me Someone Else

Email Subject

Email Body

Image: There are several fields, both required and optional, to complete and save.

In the scheduled report information window, complete all of the marked required fields as well as any optional fields, including:

- **Format** - The format of the report that you are scheduling to send.
- **Schedule Name** - An internal name that is only used for organizing your scheduled reports.
- **Repeat Pattern** - An optional opportunity to repeat sending the report daily or weekly.
 - *Tip:* If you need to set up a report to run monthly, set the weekly repeat option to every fourth week.
- **Begin Report Schedule on** - The date you want to send the first report (or only) email.
- **Run Time** - Enter the time of day you want the email sent.
- **Email options** - including **To**, **CC**, **BCC**, **Email Subject**, **Email Body** (text to accompany the report attachment).
 - When searching for contacts, you may search for their name or email address

Schedule Report

Schedule Name - Required:

Repeat Pattern: **Does Not Repeat** ▾

Begin Report Schedule on: **Thu Mar/11** 📅

Run Time: **11:15 am**

Email Report To - Required: **You can type an address into email fields or utilize the 25Live contact search option**

Email Report cc:

Email Report bcc:

Email Report From:

Email Subject:

Email Body:

Examples:

- Example person, Jane
nobody@collegenet.com ☆
- Conference Services Manager
conference@yourschool.edu ☆
- Smith, John
smith.j@collegenet.edu ☆
- Food Services Manager
catering@yourschool.edu ☆

Image: You can type an address into email fields or utilize the 25Live contact search.

- **Report Parameters** - Optional parameters differ with each report to fine-tune what information is sent.



Tip: Some Reports Allow For Relative Start Dates

Some reports allow you to enter parameters for dates that are a number of days before or after the scheduled reporting date for the report's start date.

For example:

- If the report is scheduled to run on Monday, December 5th, and you want the results to include data from the previous week, you can enter -7
- To include the following week's data, enter 7
- To only include results beginning on the scheduled Reporting Date, enter 0 (zero)

The following reports allow for relative dates:

- Daily Events (just one day)
- Daily Operations
- Daily Room Sheet (just one day)
- Daily Setup by Location
- Daily Setup Report
- Event Checklist
- Event Location Monthly Calendar
- Events by Organization Type
- Location Activity Date/Time Graphic
- Location Availability Grid Daily (one day)
- Location Monthly Calendar
- Location Unlock - Lock Times
- Location Unlock-Lock (3 Day) (one day)
- Requirement and Resource Daily Setup
- Reservation by Date

3. Save Your New Scheduled Report

Use the **Save Scheduled Report** button in the lower-right of the window to save all your entries.

Your new scheduled report will now appear in the list or grid view of existing report schedules.

Viewing Existing Listings

Existing schedules are shown in pages of results. Use the left (<) or right (>) arrows to go through the pages if more than one is displayed.

How to Edit a Report Schedule



Note: You Can Only Edit Reports That You Own

The Edit, Delete, Inactivate, or Active links are only available if you created the report schedule. If you are an administrator that needs to edit a schedule you don't own (such as when an employee has left), use the [Masquerade feature in 25Live Pro](#) then return to the 25Live Reports application. Any user can copy any report schedule.

1. Choose an Existing Schedule To Edit

Status	Created By	Actions
Active ▾	Joe Faculty	Edit Copy Delete
Active ▾	Jane Registrar	Edit Copy Delete
Active ▾	Bob Administrator	Edit Copy Delete

Image: The Edit link is available in both the list view and grid view.

Find the schedule you wish to edit (see above on how to filter long lists), then use the **Edit** link.

2. Change Report Schedule Fields

Contact Directory

Format Option - Required
PDF ▾

Schedule Report

Schedule Name - Required
Monthly Contact Report

Repeat Pattern
Weekly ▾

Repeat Every
4th Week ▾

Repeat on
 Monday Tuesday
 Wednesday Thursday
 Friday Saturday
 Sunday

Begin Report Schedule on
01/04

Run Time
3:00 pm

Email Report To - required
Admin Testing, qa@collegenet.com

Image: The information window has required and optional fields you can edit for the selected schedule.

You can edit any of the fields you had available when creating the report scheduling. You can:

- Select a different Format
- Rename the report schedule
- Change the repeating pattern
- Change the report dates
 - Begin (*editing not recommended*)
 - Run Time
- Change report recipients and other standard email options:
 - To, CC, BCC
 - Email Subject
 - Email Body
- Alter Report Parameters

3. Save Your Changes

Use the **Save Scheduled Report** button in the lower-right of the window to save all your changes.

Copying an Existing Report Schedule

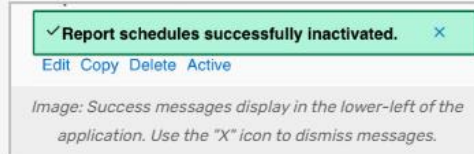
Even if you do not own a report, you have the option to copy it.

Use the **Copy** link in the action links area to create a duplicate of any report schedule. The information window will display all the fields for you to select or change from the copied schedule.

You should change the name of any copied report schedule.

The **Save Scheduled Report** button in the lower-right of the window will save your copied report schedule.

Deleting and Changing the Active Status of a Report Schedule



Use the **Delete** link (in the **Actions** column in the list view or at the bottom of grid view blocks) to remove a schedule.

Use the **Inactivate** or **Active** links to change a report schedule's active status.