



Cornell University

Use of Central Scheduling Tools

Approved by the Space Use Advisory Committee; 3/29/18

Approved by the Academic & Event Scheduling and Integrated Workplace Management System Executive Steering Committee; 5/17/18

INTENTION AND SUMMARY

This policy statement is intended to promote the use of centrally supported space and event scheduling tools to provide a consistent end user experience, enhance operational efficiencies and technical support, and gain further understanding of space utilization.

This policy addresses the tool by which a space is scheduled. It is not the intent of this policy to address parameters related to scheduling workflows, especially in terms of unit roles or approvals of space use.

This policy is being revised in conjunction with a project to implement 25Live® as the institutional system of engagement for class and event scheduling. During project implementation, an Executive Steering Committee will govern and decide issues of system configuration, including system security and workflow, that advance implementation of this policy. Beyond the project, a 25Live® System Steering Committee will continue to guide decisions regarding policy interpretation and implementation and system configuration.

Appendix A presents a framework for implementing this policy over a period of three years. During implementation of 25Live®, the Executive Steering Committee for the project may revise the framework objectives and the timeline based on the experience and advice of the Project Team. Once 25Live® is in production, the annual review process for the policy will evaluate progress toward full achievement of this framework and will consider stakeholder input and governance objectives in developing an annual revision.

Appendix A establishes priorities for room scheduling in 25Live®. It is the intention of the Executive Steering Committee to achieve full scheduling of all *instructional and event spaces* (defined below) in 25Live® within a period of three years. The ramp-up period is to allow units and central staff time to adjust to new processes and expectations. Units are encouraged to begin scheduling rooms in 25Live® more quickly than the schedule currently requires.

GIVENS

- [University Policy 2.7, Reporting the Use of Facilities](#), defines room types by name and by room type code. The room types follow from the Postsecondary

Education Facilities Inventory and Classification Manual (FICM) (May 2006) and are consistent across higher education in the United States.

- Policy 2.7 assigns the responsibility for an accurate physical space inventory to the units occupying the space.
- The physical space inventory is recorded in the Facilities Inventory System (FIS) maintained by Facilities and Campus Services.
- The University provides and maintains central scheduling tools:
 - 25Live® for classes and events, and
 - Microsoft® Outlook for meetings. Simply defined, meetings are events with an invited list of known attendees. Meetings often occur in conference rooms.

EXPECTATIONS

Spaces Scheduled in 25Live®

The following spaces on the main campus, collectively identified as *instructional and event spaces*, shall be scheduled in 25Live®:

1. Institutional outdoor spaces on a list vetted by institutional risk, security and event staff as appropriate venues for events.
2. Rooms that meet the [Policy 2.7 definition](#) for:
 - Classroom facilities (room type code 110)
 - Instructional laboratories (room type codes 210, 212, 220)
 - Assembly (room type code 610)
 - Meeting room¹ (room type code 680)

There should be an exact correspondence between the list of instructional and event rooms in the FIS and in 25Live®.

Spaces Scheduled and Requestable in 25Live®

Classrooms, assembly spaces, and a defined set of institutional meeting rooms and outdoor spaces will be known as Requestable Spaces. Institutional meeting rooms are those with a primary intended function to serve the meeting needs of the campus community rather than a single department or unit. Requestable outdoor spaces are areas of the campus vetted by institutional risk, security and event staff as appropriate venues for events.

Spaces Optionally Scheduled in 25Live®

Conference rooms (room type code 350), defined as those rooms serving an office complex (i.e., considered by organization (a department or unit) or by physical grouping (a group of related office workspaces)) and used primarily for meetings and

¹ Meeting rooms are often confused with conference rooms. Although a meeting room may be assigned to a specific organizational unit, it is more available and open to various groups and generally functions in more configurations than a conference room. Meeting rooms are also used more frequently for events with both invited and public attendees. More often than not, the events held in conference rooms include known lists of invitees. Meeting rooms may be configured like classrooms (i.e., with participant focus to the front of the room) and may be equipped with a variety of furniture types. Department seminars are often held in meeting rooms.

unit activities that are not directly related to instruction and with known attendees, are not required to be scheduled in 25Live®. Conference rooms are typically scheduled in Microsoft® Outlook, the University's calendaring tool. Conference rooms can be scheduled through 25Live® if that is the stewarding unit's preference.

Units may choose to schedule rooms other than instructional and event spaces and conference rooms with 25Live®, Outlook®, or by other means suitable to the unit.

RESPONSIBILITIES

Units are responsible for:

- Recording an accurate and complete room inventory, in accordance with Policy 2.7;
- Coordinating with the Office of the University Registrar and Residential and Event Services to include all instructional and event spaces in 25Live®;
- Identifying system users, in accordance with the system roles, and
- Providing sustained leadership in implementing this policy, triaging and resolving exception requests, and facilitating communications between the project team and the unit stakeholders (during project implementation) and after the system is operational.

The Office of the University Registrar and Residential and Event Services are responsible for:

- Establishing and maintaining 25Live® security, including roles within the system, in accordance with direction from the Executive Steering Committee during project implementation, and the 25Live® System Steering Committee once the project is complete.
- Supporting the senior executives and the 25Live® System Steering Committee in:
 - developing and maintaining procedures to monitor compliance with this policy, and
 - developing and implementing procedures for units to petition for an exception to this policy.

The Director of Capital and Space Planning and the University Registrar will coordinate periodic reviews to verify that rooms supporting classes (including laboratory sections) are properly inventoried in the Facilities Inventory System.

During system implementation, the Executive Steering Committee is responsible for development, interpretation and enforcement of this policy as well as authorization of exceptions. The project team will review loading rooms, security, and other configuration issues with the Executive Steering Committee if there are any questions or concerns regarding alignment with the policy intent.

Once 25Live® is implemented, the individuals who provide executive oversight for Residential and Event Services and the Office of the University Registrar are responsible for interpretation and enforcement of this policy as well as authorization of exceptions, in consultation with the 25Live® System Steering Committee.

The 25Live® System Steering Committee is responsible for full implementation of this policy.

The University Registrar, the Director of Residential and Event Services, and the Director of Capital and Space Planning will lead the annual review of this policy. Suggested revisions that change the intention of this document in terms of requestable space types or room types scheduled in 25Live® will be reviewed with the college associate deans. Both the Space Use Advisory Committee and the 25Live® System Steering Committee will be asked to endorse policy changes.

RELATED POLICIES

University policies are published by the [Policy Office](#) and space and scheduling-related policies are published by the [Division of Budget and Planning](#). Three policies of particular relevance to the *Use of Central Scheduling Tools* policy include the following:

- [University Policy 2.7, Reporting the Use of Facilities](#), requires units to maintain accurate and complete inventories of unit space. This policy identifies room type codes and room type descriptions and provides detailed explanations of each room type.
- *Access to Space for Events* defines expectations and procedures for Cornell units and organizations to gain access to classroom and event space to support mission-driven activities of the institution.
- *Fees for Internal Users of Cornell Physical Space* establishes consistent procedures to determine and charge space rental fees to internal users and describes the circumstances under which a fee may be charged. An Interdepartmental Fee Committee approves the amount of space rental fees.

GLOSSARY

25Live®: A scheduling system that facilitates and manages the scheduling of classes and events, allowing authorized users to search for and request and/or reserve times, venues and resources. 25Live® is a part of the CollegeNet Series25 Scheduling and Space Management products.

Class: A class is an instance of a course that is scheduled into a specific academic term. Classes are listed in the Class Roster. A class is a subtype of an Event.

Event: An activity that occurs within a specific date and time range. An event may be an academic class, a class-related event, a non-academic campus event, or a community-sponsored event. Events attendees may include specific known individuals as well as the general public.

Facilities Inventory System (FIS): Web-based data management tool used to collect, manage and report physical space inventory and building characteristic inventory data in accordance with Policy 2.7. The Facilities Information Group in Facilities and Campus Services manages the FIS.

Meeting: A gathering of people at a specific date and time for some purpose. Meetings

are characterized by required specific attendees. A meeting is a subtype of an Event.

Requestable Space: A room, group of rooms or outdoor space that can be reserved for non-class events; includes classrooms, assembly spaces, and certain institutional meeting rooms. Institutional meeting rooms are those with a primary intended function to serve the meeting needs of the campus community rather than a single department or unit.

CONTACTS

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Appendix A. Framework for implementing the Use of Central Scheduling Tools policy.
Approved by the Academic & Event Scheduling and Integrated Workplace Management System Executive Steering Committee; 5/17/18

Sequencing Rooms into 25Live®

The 25Live® Project Team intends to lead development of a User Interface that manages risk management workflow currently embedded in the Event Registration Form. The following objectives are based on the assumption that a room can be loaded into 25Live® but does not need to be scheduled in 25Live® in order to use the to-be-developed risk management workflow. The objectives will need to be revised should it prove necessary to have the system schedule all rooms hosting events with risk triggers.

Objective, Go-Live: At the point 25Live® becomes operational, all instructional and event spaces will be loaded into the system. Undergraduate colleges will be required to schedule general-purpose classrooms (room type 110) and assembly spaces (room type 610) in 25Live®. The classroom and assembly spaces in the undergraduate colleges constitute the majority of spaces that support undergraduate class activity, in terms of number of students and number of class sections. These rooms are also most highly desirable as requestable spaces for non-class events.

At implementation, scheduling of institutional meeting rooms will also need to occur in 25Live®. Institutional meeting rooms will include G01 and G10 Biotechnology and rooms in the Community Centers on North Campus.

Subsequent annual reviews may amend the list of institutional meeting rooms.

Further additions to required scheduling in 25Live® will occur in subsequent academic years, as follows:

Objective, Beginning of Year 2: All requestable outdoor spaces and non-institutional meeting rooms (room type 680)

Objective, Beginning of Year 3: Instructional laboratories (room types 210, 212, 220) and classrooms and assembly spaces in the professional schools

Scheduling may occur in 25Live® for any space in advance of any objective, if so requested by the stewarding unit.

Objectives for Requesting, Viewing, and Approving Room Requests

Room requests will follow a detailed workflow process determined during the 25Live® system implementation project. For this version of this Appendix to the policy, and until certain system configuration issues are better understood, the objectives are stated at a fairly high level. These statements will be confirmed or adjusted during implementation, and as a result of subsequent annual reviews of this policy.

Objective for Requesting Spaces: All faculty, staff and students with a net ID will be able to request classrooms, assembly rooms, and institutional meeting rooms (collectively identified as Requestable Spaces) in 25Live® at system go-live.

Objective for Viewing Rooms: Requestable Space availability will be viewable by all faculty, staff and students with a net ID. Availability means hours reserved and hours available, not the details of reservations.

Objectives for Approving Room Requests

To streamline configuration and workflow and allow for redundancy, the number of security roles in the system will be held to a minimum. Containing the number of roles will need to be balanced against the ability of the system to route approval workflow as appropriately and directly as possible.

Security roles will not be approved or established for individual rooms or room types within a department-level organization except under the most extenuating circumstances.

Full system implementation should encourage some requests to approve automatically, without staff intervention. Automatic reservations are required to implement walk-up booking and should be a reasonable outcome in other use cases.