

# CEO-Deux: York’s Classroom Equipment Ordering System

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## Log in to CEO-Deux

1. Go to the CEO-Deux launch page at [ceo.yorku.ca](http://ceo.yorku.ca)
2. Select the **Sign In using Passport York** button
3. Log in with your Passport York username and password

Figure 1: CEO-Deux launch page

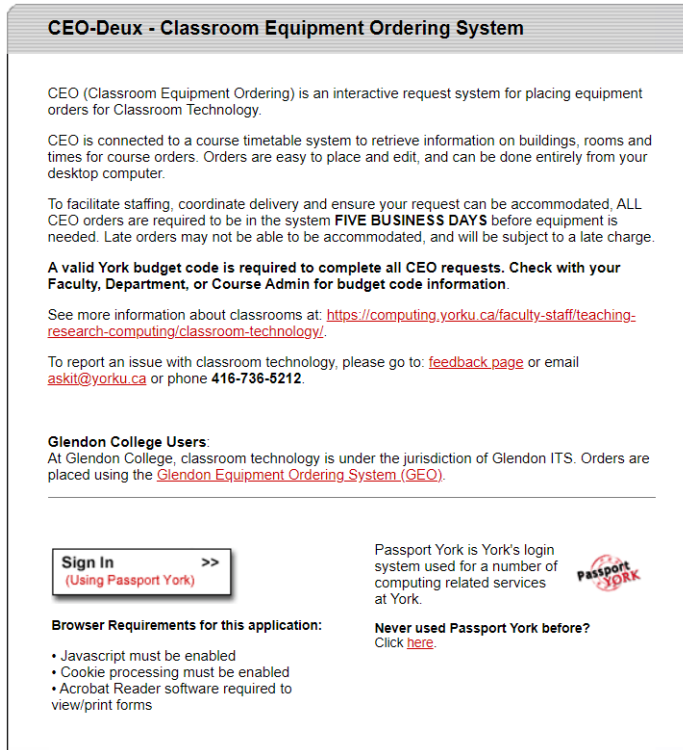
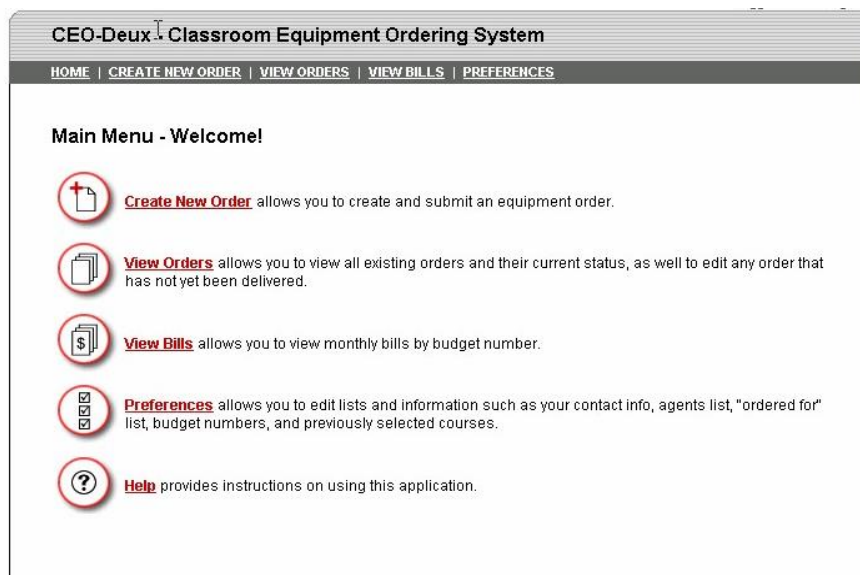


Figure 2: CEO-Deux Home Screen



## Set Your Preferences

Preferences may be set up or modified at any time, but at minimum you must set up your contact info before you can place your first order.

### Contact Info

To set up your contact information:

1. Click on the **Preferences** link
2. In the Your Contact Info area, enter your campus address, phone number and email address
3. Click **Save Contact Info**

Figure 3: CEO-Deux Preferences showing contact info entered

### Agents

“Agents” are co-workers who share the responsibility for placing or editing orders within your department or on your behalf. Your agents have the same privileges as you over your orders. They can view, edit or place orders as well as cancel an order placed by you.

Figure 4: Agents list with no agents added yet

To add an agent:

1. Click **Add/Edit Agents**
2. Type the last name of a coworker in the Surname field, and click the Search button
3. Select the name you were searching for by clicking on the hyperlink
4. Click the **Save Changes** button
5. When done adding agents, click the **Return to Preferences** button

You should now see the name you added listed under Agents on the main preferences screen.

The best way to search for a name is to enter the last name only; if you get too many results, try adding a first name.

Figure 5: Adding agents showing one agent already added

### Preferences - Agent List

The following is your Agent List, the list of people who you have given access to view and edit your orders. To delete a name, select and click "Delete":

Cindy S. Elmer

Delete

To add an agent, enter a name and then click on "Search":

First Name      Surname

           Search

**You have unsaved changes.**  
Click "Save Changes" to save your changes, or "Return to Preferences" to discard changes.

Save Changes      Return to Preferences

## “This Order is for”

When placing orders, you must indicate the name of the person for whom you are ordering equipment.

Figure 6: "This order is for" list with no one added yet

**"This Order is For"**

The following is your "This Order is For" list, a list of people you create orders for. To edit this list, click on "Add/Edit List" button below:

- None

To add someone to your “this order is for” list:

1. Click the **Add/Edit List** button.
2. Enter the last name of an employee and click the **Search** button.
3. Select the name you were searching for by clicking on the hyperlink.
4. Click the **Save Changes** button
5. When done adding names, click the **Return to Preferences** button

You should now see the name you added listed under Agents on the main preferences screen.

## Courses & Budget Numbers

This document shows how to add Courses and Budgets numbers at the time you create an order, but you can do it in advance from the Preferences if you prefer.

Figure 7: The dialogues for adding budget numbers and courses directly from your CEO-Deux preferences

**Preferences - Budget Numbers**

To add a budget number, enter the details and then click on "Add":  
Note: Include leading zeros where applicable.

Account	Fund	Cost Centre	Activity	Time	Location
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

**Preferences - Course List**

To add a course, select and then click on "Look-up Course":

Academic Year	Faculty	Subject	Course Number
<input type="text" value="Select Year"/>	<input type="text" value="AP"/>	<input type="text" value="ADMB"/>	<input type="text"/>

# Create a Course Order

## Start a Course Order

1. Click the **Create New Order** link from the Home page or main menu bar
2. If you're ordering for this course but outside of scheduled times, such as for a special event, also select "NO" in response to the question "For this order, will you be ordering equipment **for scheduled class times?**"

Figure 8: Select Course screen, with no course yet selected

Figure 9: Option to order equipment for scheduled or non-scheduled class times

## Add a New Course

If you haven't already added courses via the Preferences page, you can add one from the Select Course page. Courses you add from within the order will be added to your preferences as well.

The information you need to locate the course should be provided by the course instructor.

First, search for a course:

1. Click the **Add a course** link, to the right of the Select existing course menu
2. Select the Academic Year, Faculty, Subject Code, and Course Number from the menus

3. Click the **Look-up Course** button to display a list of courses
4. Select a course by clicking on its link

Next, save and return to your order:

1. Click the **Save Changes** button
2. Click the **Return to Order** button to return to the Select Course screen
3. **Select the course** you just added
4. Click **Continue** to proceed to the next screen, Create Your Order

If you fail to click Save Changes before returning to the order, the course will not be saved in your preferences.

Figure 10: Adding a new course while placing an order takes you to the course list in your preferences

### Preferences - Course List

The following is a list of courses that you have previously ordered for, and they are displayed on the Course Info page for easier selection.

To delete a course, select and click "Delete":

2004\_AK\_ADMS\_W\_2400\_\_3\_R\_EN\_A\_INTR\_01

---

To add a course, select and then click on "Look-up Course":

Academic Year	Faculty	Subject	Course Number	
2004	AK	ADMS	<input type="text"/>	<input type="button" value="Look-up Course"/>

**Click on course code to add course:**

**Course Code**

[2004 AK ADMS W 2400 3 R EN A INTR 01](#)

[2004 AK ADMS W 2400 3 M EN A LECT 01](#)

[2004 AK ADMS W 2400 3 N EN A LECT 01](#)

[2004 AK ADMS W 2400 3 P EN A LECT 01](#)

[2004 AK ADMS W 2400 3 Q EN A INTR 01](#)

Figure 11: After saving a new course to your list, select Return to Order to continue placing your order.

Logged in as: **wjg1111**

### CEO-Deux - Classroom Equipment Ordering System

HOME | CREATE NEW ORDER | VIEW ORDERS | VIEW BILLS | PREFERENCES

### Preferences - Course List

To add a course, select and then click on "Look-up Course":

Academic Year	Faculty	Subject	Course Number	
2004	AK	ADMS	2400	<input type="button" value="Look-up Course"/>

Figure 12: Back on the Select Course screen, select the course and click Continue

**Select Course**

If this is a **COURSE** order, select or add the course, then click on "Continue":

2023\_AP\_ADMS\_F\_1000\_\_3\_A\_EN\_A\_LECT\_01 OR [Add](#) a course.

For this order, will you be ordering equipment for **scheduled class times**?

Yes  No

[Continue](#)

## Manage Course Order Dates

CEO-Deux automatically adds all the scheduled dates of the selected course.

## Delete Dates

You may need to remove dates that fall on holidays or that have been cancelled. CEO-Deux will flag dates that fall on holidays as “may not be available.”

1. Click the Continue button from the Select Course screen, if you haven’t already done so
2. Click the **Delete Dates** button
3. Click in the **checkbox(es)** next to the date(s) to be deleted
4. Click the **Delete Dates** button
5. Click the **OK** button at the bottom of the screen to return to the Create Your Order screen

Figure 13: A list of dates automatically added to a course order, showing the Delete Dates button and a date flagged as “may not be available”

The following date(s) have been added:

- Mon January 10, 2005 07:00 PM-10:00 PM CLH H
- Mon January 17, 2005 07:00 PM-10:00 PM CLH H
- Mon January 24, 2005 07:00 PM-10:00 PM CLH H
- Mon January 31, 2005 07:00 PM-10:00 PM CLH H
- Mon February 07, 2005 07:00 PM-10:00 PM CLH H
- Mon February 14, 2005 07:00 PM-10:00 PM CLH H - *May not be available*
- Mon February 21, 2005 07:00 PM-10:00 PM CLH H
- Mon February 28, 2005 07:00 PM-10:00 PM CLH H
- Mon March 07, 2005 07:00 PM-10:00 PM CLH H
- Mon March 14, 2005 07:00 PM-10:00 PM CLH H
- Mon March 21, 2005 07:00 PM-10:00 PM CLH H
- Mon March 28, 2005 07:00 PM-10:00 PM CLH H

[Delete Dates](#)

To view the reason why a course date has been flagged as possibly not being available, you can click the Delete Dates button, then in the Delete Dates window click on the link for the date that was flagged. A pop-up window will appear with an explanation.



## Add Dates


You may need to add dates that are not currently listed in the regular class schedules. For example, a keynote speaker may be scheduled for a time that falls outside the regular course schedule, and requires equipment to be delivered or the speaker to be trained on using the equipment.

1. Click the **Add Dates** button.
2. Scroll down and fill in the date, time, building and room
3. Enter an event note with any special instructions such as “Please place the microphone at the front-left side of the classroom”
4. Click the **Add this Date** button
5. Scroll down and click the **Continue** button to return to the Create your Order page

Event notes are notes to the Classroom Operations staff with instructions for that specific date. For example, you may want the microphone placed off to the side on a specific date because the instructor will be bringing in large props that will be placed at the front of the classroom.

Figure 14: Adding a date to a course, showing an event note

**To add a date**, enter the details below, then click "Add date".  
To create an event which has multiple times and locations, [click here](#).

**Day (yyy-mm-dd):**  

**Time (hh:mm):** From:  :   To:  :

**Location:** Building:  Room:

**Event Note for ITC Personnel:**  
Please place the microphone at the front-left side of the classroom.

## Modifying an Existing Course Date

You may need to modify an existing course date, e.g., to change the location for that day.

1. **Click on the date** you want to modify to display the Edit Date window
2. **Edit that date:** e.g., change the building and room number

3. Click the **OK** button

## Add Equipment

Before adding equipment to an order, please use York’s [Learning Spaces List](#) to check whether the classroom you are ordering for already has the required equipment installed.

To add equipment to your order:

1. Click the **Add Equipment** button to open the Add Equipment window.
2. **Select** the checkbox for each piece of equipment you need
3. Enter a **quantity** for each piece of equipment using the drop-down menu
4. When done, click the **OK** button.

Figure 15: Add Equipment form

**CEO-Deux - Classroom Equipment Ordering System**

HOME | CREATE NEW ORDER | VIEW ORDERS | VIEW BILLS | PREFERENCES | ADMIN

### Add Equipment

Select the equipment items to be displayed on the "Create Your Order" page.  
Use the checkboxes to select the item(s) you want for the order.  
Use the drop down select box and/or text fields to set default values.

Cancel OK

<b>Computer Projection</b>		<b>Video Playback Equipment</b>	
<input type="checkbox"/>	0	Brief In-Class Demo	
<input type="checkbox"/>	0	UIT PC (UIT Projection)	
<input type="checkbox"/>	0	UIT Projector (Presenter brings Device)	
<b>Video Recording Equipment</b>		<b>Audio Equipment</b>	
<b>Audio Recording Equipment</b>		<input type="checkbox"/>	0
No items			Public Address System - Small Audience
<b>Microphones</b>		<input type="checkbox"/>	0
<input type="checkbox"/>	0	Neck/Lapel Microphone	Public Address System - Large Audience (150+)
<input type="checkbox"/>	0	Wired Stand Mic (Lectern)	Operator
<input type="checkbox"/>	0	Wired Mic (desk/panel)	
<input type="checkbox"/>	0	Wired Stand Mic (Aisle)	
		<b>A/V Projectors</b>	
		<b>Other Services</b>	
		<input type="checkbox"/>	
			Client Services-Temp. Accounts-enter #requested
		<input type="checkbox"/>	0
			Price Family Cinema - UIT will call
		<input type="checkbox"/>	0
			Cinema - Nat Taylor/ACW

Cancel OK

Figure 16: Create Your Order screen showing course date, time, location and equipment ordered

**Create Your Order**

Add Dates    Delete Dates    Add Equipment    Remove Equipment

Date	Time	Building	Room	Note	VHS Playback with TV	Mics for PA and Recording
<a href="#">Tue September 14, 2004</a>	07:00 PM-10:00 PM	BET	341		1 ▾	1 ▾
<a href="#">Tue September 21, 2004</a>	07:00 PM-10:00 PM	BET	341		1 ▾	1 ▾
<a href="#">Tue September 28, 2004</a>	07:00 PM-10:00 PM	BET	341		1 ▾	1 ▾
<a href="#">Tue October 05, 2004</a>	07:00 PM-10:00 PM	BET	341		1 ▾	1 ▾

**Order notes** are notes to the Classroom Operations staff with instructions for all dates in the order. For example, “always place the overhead project on the table at the front of the room.”

### Change Equipment for One Date

Equipment delivery for an individual date can be modified using the number dropdown next to that date on the Create Your Order screen shown above.

For example, if a faculty member is running an exam on a specific date and does not require the microphone, select 0 from the drop down next to that course date.

### Remove Equipment from the Order

1. From the Create Your Order screen, select **Remove Equipment**
2. Click in the **checkbox** next to the equipment you want to remove to select it for deletion
3. Click the **OK** button
4. Click the **Continue** button to return to the Order Information page

Figure 17: Remove Equipment screen

CEO-Deux - Classroom Equipment Ordering System

[HOME](#) | [CREATE NEW ORDER](#) | [VIEW ORDERS](#) | [VIEW BILLS](#) | [PREFERENCES](#)

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**Remove Equipment**

Select the equipment items to be removed from the "Create Your Order" page.  
Use the checkboxes to select the item(s) you want to remove from the order.

<p><b>Computer Projection</b></p> <p><b>Video Equipment</b></p> <p><input type="checkbox"/> VHS Playback with TV</p> <p><b>Other Equipment</b></p>	<p><b>Audio Equipment</b></p> <p><input type="checkbox"/> Mics for PA and Recording</p> <p><b>A/V Projectors</b></p> <p><b>Quick List</b></p>
--	---

Cancel    OK

## Specify Who the Order is For

On the Order Info page, you can select a name of anyone you've previously added to CEO-Deux or add someone on the spot.

To add a new name directly from the Order Info page:

1. Click the **Add** link under the heading "This order is for"
2. Type the last name in Surname field, and click the **Search** button
3. **Click the name** of the person you were searching for
4. Click the **Save Changes** button
5. Click the **Return to Order** button
6. Back on the Order Info page, **select the person** you just added

If you would like to have a confirmation email sent to the person you are placing the order for, click on the checkbox next to "send an e-mail copy of this order to this person".

Figure 18: Adding a new name to the "This Order is For" list showing one name already added

**Preferences - "This Order is For" List**

To add a name, enter a name and then click on "Search":

First Name	Surname	
<input type="text"/>	<input type="text"/>	<input type="button" value="Search"/>

*Click on the person's name to add person:*

Name	Department	Username
<a href="#">Erin Teich</a>		eteich

**You have unsaved changes.**  
Click "Save Changes" to save your changes, or "Return to Preferences" to discard changes.

## Add a Budget Number

You can select from previously-saved budget numbers, or add one on the spot.

To add a new budget number from the Order Info page:

1. Click the **Add** link found under Budget Number.
2. **Enter the budget number** in the appropriate Account, Fund and Cost Centre fields
3. Click the **Add** button
4. Click the **Save Changes** button.
5. Click the **Return to Order** button.
6. On the Order Info page, **select the budget number** you just added.

Figure 19: Adding a new budget number, showing one already added

### Preferences - Budget Numbers

The following is your list of saved Budget Numbers.  
To delete a budget number, select and click "Delete":

320900-200-200500-0-0-0

---

To add a budget number, enter the details and then click on "Add":  
Note: Include leading zeros where applicable.

Account	Fund	Cost Centre	Activity	Time	Location
<input type="text" value="305000"/>	<input type="text" value="200"/>	<input type="text" value="232921"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

## Preview and Confirm the Order

1. Click the **Preview Order** button to display the Confirm Your Order page
2. **Review** the order
3. If you're ready to go ahead, click the **Submit Order** button at the bottom of the screen to display the Order Summary page.

Figure 20: Confirm Your Order preview screen

**CEO-Deux - Classroom Equipment Ordering System**

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### Confirm Your Order

Order by: **Christine Wright**  
 Address: 043 Central Square  
 Phone: 30357  
 E-Mail: [wright@yorku.ca](mailto:wright@yorku.ca)

This order is for: **Erin Teich**

Budget Number: **305000-200-232921-0-0-0**

Course: **2004\_AK\_ADMS\_F\_2400\_\_3\_A\_EN\_A\_LLECT\_01**

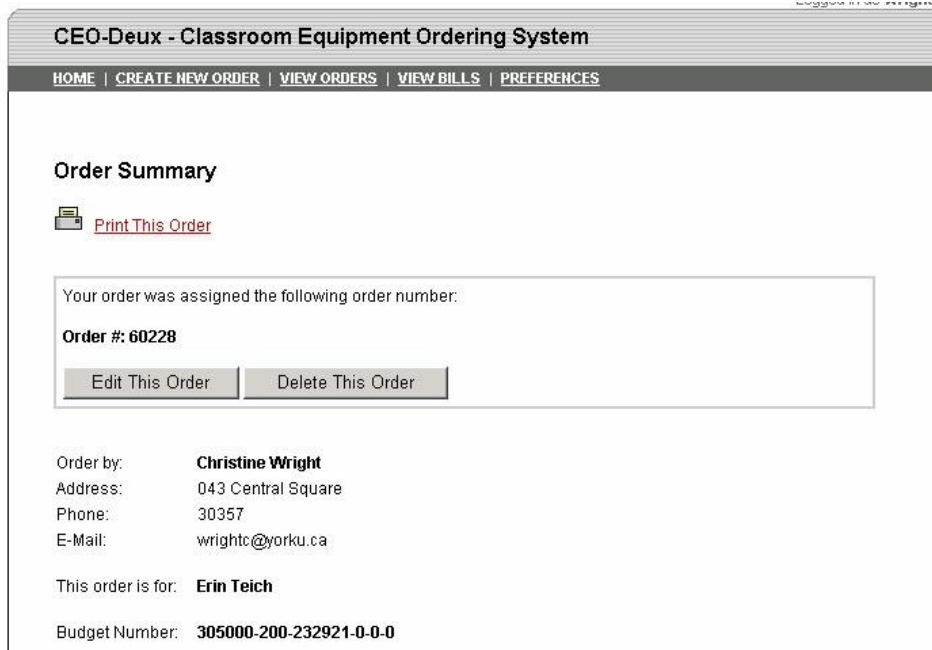
Order Note: *None entered*

Date	Time	Building	Room	Note	Mics for PA and Recording
<a href="#">Tue September 14, 2004</a>	07:00 PM-10:00 PM	BET	341		1
<a href="#">Tue September 21, 2004</a>	07:00 PM-10:00 PM	BET	341		1

## Order Summary Page

The Order Summary page assigns a number to your order for tracking purposes. From here you can also print, edit or delete the order.

Figure 21: Order Summary page



## Create an Event Order

### Start the Event Order

1. Click the **Create New Order** link.
2. Click the **second Continue button**, under the statement: **If this is NOT a course order**, click on “Continue” below.

Figure 22: Option to place an event order

If this is NOT a course order, click on "Continue" below:

Continue

### Add Dates and Locations

For an event held at one place and time, simply enter the event’s date, time, building and room number in the spaces provided.

**To add multiple locations** for a single date:

1. Click the “click here” link in the sentence that says “To create an event which has multiple times and locations, click here.” This will display the Add Multiple Events page.
2. Enter the date in the date field.
3. Enter the start and end times, buildings, and room numbers in the fields provided
4. Scroll down and click the Add These Dates button at the bottom of the screen to return to the Add Multiple Events page.
5. Scroll down and click the Continue button to go to the Create Your Order page.

Figure 23: Adding multiple times and locations to a date

Day (yyyy-mm-dd): 2004-10-10

1.	9	:00	AM	To:	11	:00	AM	Osgoode Hall Law School	Room:	204
2.	2	:00	PM	To:	3	:00	PM	Atkinson College	Room:	205
3.		:	AM	To:		:	AM	Select a building	Room:	

---

For a complex event such as a conference with multiple dates, times and rooms, we highly recommend consulting directly with UIT’s classroom technology team well in advance of the event.

---

## Add Equipment

1. Click the **Add Equipment** button.
2. **Select the equipment** needed, and indicate the **quantity**
3. Click **OK**.

This displays the Create Your Order page with the equipment added

Figure 24: Create Your Order screen showing two different times and locations for the same event

**CEO-Deux - Classroom Equipment Ordering System**

HOME | CREATE NEW ORDER | VIEW ORDERS | VIEW BILLS | PREFERENCES

**Create Your Order**

Add Dates | Delete Dates | Add Equipment | Remove Equipment

Date	Time	Building	Room	Note	Neck Microphone
Sun October 10, 2004	09:00 AM-11:00 AM	OSGH	204		1
Sun October 10, 2004	02:00 PM-03:00 PM	ATK	205		1

## Finish the Order

1. From the **This Order is For** dropdown, select the person you're ordering for
2. From the **Budget Number** dropdown, select a budget number
3. Click the **Preview Order** button.
4. **Review** the order
5. Click **Submit Order**

Figure 25: Selecting the person the order is for and the budget number

**This Order is For:**

Erin Teich

OR [Add](#) a person.

Send an e-mail copy of this order to this person

Alternate e-mail address (optional):

**Budget Number:**

305000-200-232921-0-0-0

OR [Add](#) a budget number.

Cancel Order | Edit Dates/Equipment | Preview Order

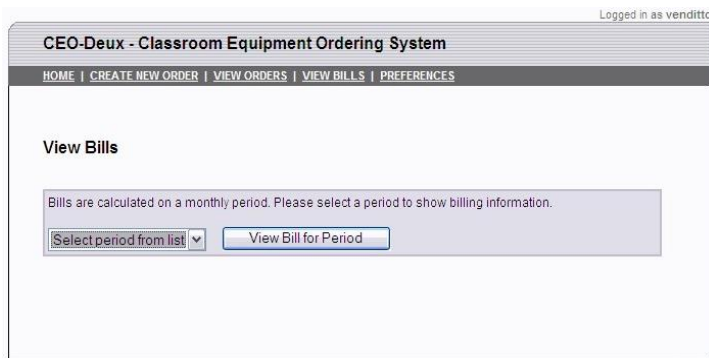


## View Bills

Bills for classroom services are calculated monthly. At any time you may view your bills for a particular billing period.

1. Click **View Bills** from the Home page or main menu bar
2. Use the drop down menu button to select the **billing period**
3. Click the **View Bill for Period** button.

Figure 26: View Bills screen



## View Orders

From the View Orders screen, you can sort and filter orders to locate the ones you need.

Options include:

- Date scope: Today, Last 7 Days, All
- Agent: With, Without, Only (e.g., list orders with or without orders made by people on your agents list, or list only orders made by other agents, without your own)
- Order Details: Order Number, Order For, Course Code

To view orders:

1. Click the **View Orders** button to open the Order List page
2. Use the Scope, Agent and Sort By options to filter and sort the order list
3. To edit an order, click the Order Number link in the Order # column

Figure 27: View Orders screen

**CEO-Deux - Classroom Equipment Ordering System**

HOME | CREATE NEW ORDER | **VIEW ORDERS** | VIEW BILLS | PREFERENCES

**Order List**

Scope: **Today** | Last 7 Days | All | Agent: **With** | Without | Only | Sort By: **Order #** | Order For | Course Code

**Your Orders, Total = 3 (refresh):**

Order #	Order by	Order for	Budget #	Course
<a href="#">60226</a>	Christine Wright	Erin Teich	305000-200-232921-0-0-0	2004_AK_ADMS_F_2400_3_A_EN_A_LLECT_01
<a href="#">60228</a>	Christine Wright	Erin Teich	305000-200-232921-0-0-0	2004_AK_ADMS_F_2400_3_A_EN_A_LLECT_01
<a href="#">60234</a>	Christine Wright	Erin Teich	305000-200-232921-0-0-0	

**Agent Orders (refresh):**  
No agent orders

## Delete Orders

1. Click an Order number link to display the Order Summary page
2. Click the Delete this Order button
3. In the Delete Order Confirmation window, click Yes to confirm
4. Click the Main Menu link to return to the CEO-Deux home page

Figure 28: Confirming a request to delete an order

