Using 25Live®

Creating Events
Creating an Event in 25Live

- Creating an event in 25Live is dependent on
  - How security was set by your System Administrator
  - How the Event Wizard was configured by your System Administrator
- Your ability to see some fields or do some of the processes discussed in this presentation may be dependent on how your Event Wizard was configured and your security
How to start an Event

- There are several ways to begin creating an event below are three examples:
  - Click **Create an Event** in the Event Creation area
  - **Find Available Locations** found on Dashboard
  - Click the icon that can be found in various views throughout 25Live (See PPT 2 for further information)
Navigating Event Wizard

• To navigate from tab to tab in the 25Live Event Wizard you can use the arrows that are found at the bottom of the screen.

• Fields that are marked with * are required fields and must be filled out before submitting event.

• Roll over ? at the far right of every data header bar to learn about completing the corresponding field or fields.
Event Name is a required field as all events must have an Event Name.

- This field should describe your event.
- It can be used for Publisher Calendars (marketing purposes).
- Limit to 40 characters.
Event Wizard - Event Name

Start by entering the basic event information.

Event Name

Delta Delta Delta Sock Hop

Event Title

Event Type

Select Event Type

Primary Organization for this Event

Select Primary Organization

Additional Organization(s) for this Event

Select Additional Organizations
Event Wizard - Event Title

- The Event Title can be used as the overarching theme that this event is tied to (i.e. Homecoming, Commencement)
- It can be used for Publisher Calendars (marketing purposes)
- Limit to 120 characters
Event Wizard - Event Type

- Select the type that best describes the kind of event you are having
- There can only be one Event Type per event and cannot be changed once saved in a Tentative or Confirmed state
- Selecting the appropriate type is important for reporting and calendaring
- Other fields may be dependent on which type is selected
Event Wizard – Primary Organization for this Event (Additional)

• Select the Organization(s) that is hosting or part of the event
• The appropriate organization could be important for reporting and calendaring purposes
Event Wizard – Expected Head Count

- Specify the number or people that will be attending event
- When selecting a location(s) there is an option to only see locations that meet or exceed expected head count
Event Wizard – Registered Head Count

- The number of registered people typically comes from either from your SIS for academic course or eCommerce
- Typically this is not used as a field
Event Wizard – Event Description

- This is the public marketing component to the event
- You can use the toolbar provided instead of writing out the HTML code
- **Note that not all tags work in 25Live Publisher**
Event Wizard – Date / Time

• Before entering date and time of one’s event one is asked if the event repeats
• NOTE: If your event does repeat, but it has different starting or end time then that occurrence will need to be entered as a separate event.
Event Wizard – Specify Date / Time

- Specify the **actual** event time for the start and end time.
  - This time is what will be used for marketing purposes unless otherwise noted by one’s administrator
- Specify any additional time you may need before or after event (time will be added to actual reservation time for Locations and Resources)
  - Typically Pre-Event and Post-Event time is for requestor
  - Typically Setup and Takedown time is for service providers
Event Wizard – Specify Date / Time

Delta Delta Delta Sock Hop
Homecoming 2014

Dance
ACADEMIC AFFAIRS
SGA
23 Attendees Expected
16 Attendees Registered
This is the marketing component
to Live.

Sat Nov 15 2014 8:00 am
Sat Nov 15 2014 9:00 am
Setup: 15 minutes
Pre-Event: 1 hour
Post-Event: 15 minutes
Takedown: 1 hour

Tell us WHEN this event takes place.

Select the dates and times of first occurrence of the actual event. Subsequent occurrence dates will be entered on the next page. Setup, takedown, pre- or post-event times can be specified below.

Event Start: Sat Nov 15 2014 8:00 am
Event End: Sat Nov 15 2014 9:00 am

Event Duration: 1 Hour
Reservation Duration: 3 Hours, 30 Minutes

Does this event require Setup or Pre-Event time?
Yes
No

Setup: 0 Days 15 Hours
Pre-Event: 1 Days
Reservation Start: 6:45 am

Template Text Program...

Does this event require Post-Event or Takedown time?
Yes
No

Post-Event: 1 Days 15 Hours
Takedown: 1 Days
Reservation End: 10:15 am
Event Wizard – Multi Occurrence Event

• If you selected “Yes” that this event has more then one occurrence then after selecting the first occurrence you have the option of selecting how to set up the repeat dates
• Next screen is where you will specify the repeat date
Event Wizard – Multi Occurrence Event

• NOTE: You can cancel a single occurrence without canceling the entire event
Event Wizard – Select Event Locations

• One can select
  • One location per event
  • Multiple locations per event
  • Select locations for specific occurrences in the event

• Event cannot be saved if selected Location is not available
  • Ensure “Show only my authorized locations that have no time conflicts” is selected to ensure Location is available for all occurrences

• Locations results will not consider head count unless “Ensure head count” is selected
Event Wizard – Select Event Resources

- One can select
  - One resource per event
  - Multiple resources per event
  - Select resources for specific occurrences in the event
- Event cannot be saved if selected resource is not available
- 25Live keeps track of the number of resources available and you cannot specify more than what is available
Event Wizard – Select Event Resources

**Delta Delta Delta Sock Hop**
*Homecoming 2014*

- Dance
- ACADEMIC AFFAIRS
- SGA
- 23 Attendees Expected
- 16 Attendees Registered
- This is the marketing component to 25Live.

**Sat Nov 15 2014 8:00 am**
**Sat Nov 15 2014 9:00 am**

- Setup: 15 minutes
- Pre-Event: 1 hour
- Post-Event: 15 minutes
- Takedown: 1 hour
- Repeats every week on Monday, Wednesday and Friday through Nov 21 2014

**MSC 104**
11/15, 11/17, 11/21

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**Find and select EVENT RESOURCES.**

**Your Starred Resources...**

**Search by Resource Name...**

- AV - Blu-ray Player
- AV - DVD Player
- AV - Data Projector
- AV - Extension Cord
- AV - Laptop - Mac
- AV - Laptop - PC
- AV - Microphone - Hand Held Wireless

**Selected Resources**

- AV - DVD Player

**Selected Occurrences:** 2014-11-15; 2014-11-17; 2014-11-21

**Conflicts:** None

**View and Modify Occurrences**
Event Wizard – Event Custom Attributes

- This field could have various names, but it is essentially a place where additional information can be tracked.
- You must fill out the required information to save event.

![Event wizard interface](image)
Event Wizard – Contact Roles

- Every event must have a Requestor or a Scheduler
- The person that initially created the event will automatically be listed as the Requestor
- The first person that saves the event in a Tentative or Confirmed event will be listed as the Scheduler
- The Scheduler name could also be automatically changed after save depending on how your administrator set up the application
- You may have additional roles that are based on your business practice
Event Wizard – Event Categories

• Select all the various ways in which your event can be categorized
• One can select as many categories as they wish
• NOTE: Reports and calendars can be based off the appropriate selected categories
Event Wizard – Requirements

- Answer and provide information when appropriate
Event Wizard – Calendar Requirement

- Answer and provide information when appropriate
- Typically administrator’s will set up a task that will be sent to the approver of the calendar
Event Comments, Event Confirmation Notes and Internal Notes are all fields which Requestors or Schedulers can leave additional information when appropriate.
Event Wizard – Terms and Conditions

• This is a required field and is simple a check box that states you agree with your institutions terms and conditions.
Event Wizard – Event State

• Specify the appropriate Event State for your event before saving that is appropriate with your Institution’s business process
  • **Draft**
    • Location and Resources are saved as preferences to event
    • **No Tasks** are generated with Event
    • Event Type still can be changed
  • **Tentative** and **Confirmed**
    • Location and Resources are scheduled based off appropriate security rights. If you do not have rights to assign objects then Tasks get sent to appropriate approvers
    • Tasks are generated (if any) based on Event Type, Location(s), Resource(s), Calendar Requirements and Requirements Other
    • Event Type is locked
    • The difference between Tentative and Confirmed is solely based on your institutions business process
Event Wizard – Event State

• Specify the appropriate Event State for your event before saving that is appropriate with your Institution’s business process (cont)

  • **Sealed**
    • Event is locked and cannot be edited without Administrator rights

  • **Denied**
    • Locations and Resources are released
    • Tasks are canceled
    • Event still can be edited and changed

  • **Cancelled**
    • Location and Resources are released
    • Tasks are canceled
    • Event cannot be edited
Event Wizard – Event State

Delta Delta Delta Sock Hop
Homecoming 2014

- Dance
- ACADEMIC AFFAIRS
- SGA

23 Attendees Expected
16 Attendees Registered

This is the marketing component to 25Live.

- **Sat Nov 15 2014 8:00 am**
- **Sat Nov 15 2014 9:00 am**

**Setup:** 15 minutes
**Pre-Event:** 1 hour
**Post-Event:** 15 minutes
**Takedown:** 1 hour

Repeats every week on Monday, Wednesday and Friday through Nov 21 2014

- **MSC 104**
  - 11/15, 11/17, 11/21

- **AV - DVD Player**
  - 11/15, 11/17, 11/21

- Custodial Needs
- **Admin, R25**
  - Scheduler
- **Admin, R25**
  - Requestor

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**Edit the EVENT STATE.**

- **Draft**
  - Your Location and Resource selections will be saved as preferences until this event is changed from its Draft state.

- **Tentative**
  - The event is scheduled, but is awaiting Confirmation from its Scheduler.

- **Confirmed**
  - The event is scheduled and confirmed.

- **Sealed**
  - This event is finalized and cannot be edited or changed without sufficient permissions.

- **Denied**
  - This event has been denied, and all Location and Resource reservations will marked as cancelled.

- **Cancelled**
  - This event has been cancelled, and all Location and Resource reservations will marked as cancelled.
Event Wizard – Event Save

• When you are ready to save your Event all required fields must be filled out
• You can click on Finish at the bottom of the Event Wizard

or click the save icon found at the top right of your screen
Event Wizard – Event Save

• If saving the event in an Event State other then Draft one will be saving directly to the 25Live event structure, therefore one may be asked where to save your event.

![Image: Under which heading would you like to save this event?]

• If one is not asked where to save the event then your event may have been:
  • Saved automatically to the structure
  • Converted to a Draft event because there was no where to route your event
  • You only have rights to save an event as a Draft request
Event Wizard – Save Confirmation Page Options

Once the event is saved one will see the Save Confirmation Page.
Event Wizard – Save Confirmation
Page Options (continued)

- Custom message that your administrator set

- If this event is a Draft request the desired Locations or Resources will be set as a preference

- If this is a Tentative or Confirmed the objects one does not have rights to assign will be pending approval
Event Wizard – Save Confirmation
Page Options (continued)

• **View Details** – Closes the Event Wizard and redirects one to the Events Tab - Event Details page

• **Edit** – Allows one to edit the event if one has appropriate security rights

• **Email** – Allows one to email the event to stakeholders or anyone
Event Wizard – Save Confirmation Page Options (continued)

- **Event Preferences** –
  If one does not have rights to assign or the event state is a Draft then the Event Preferences will show the Locations and Resources

- **Event Tasks** –
  Specifies the number of Tasks that were generated by this event. One can go to the Event Details to see the individual Tasks
Event Wizard – Save Confirmation
Page Options (continued)

• **More Event Options** - Additional options regarding this particular event. One will see these options when looking at the event in the Event tab under More Actions…