Processing Draft Events

© 2015 CollegeNET, Inc.

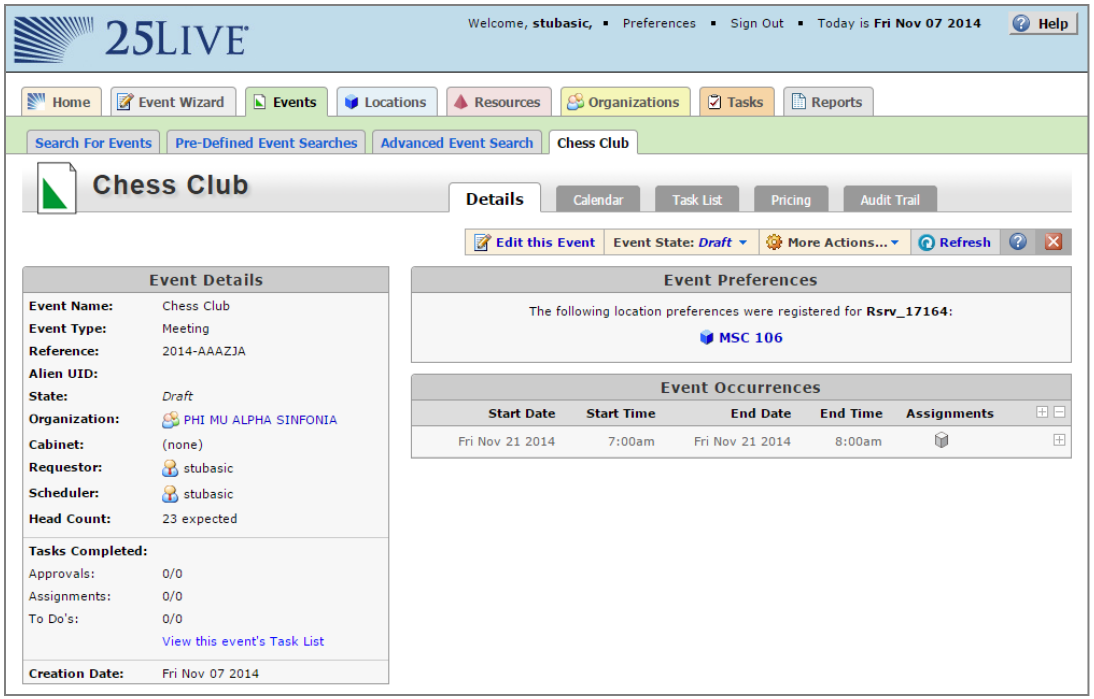
Processing Events

- Depending on institution's business process depends on how one completes and edits events
- This presentation assumes that one's business process continues with receiving Draft requests from requestors
- There are three different ways Drafts can be routed which will be described in more detail in this PowerPoint
  - Gate keeper approach – all Drafts must be touched by a single office
  - Default Scheduler – this is based off the user's security group when they submitted said request
  - Location Scheduler – each location is listed with a scheduler's name whom will be attached to said events

© 2015 CollegeNET, Inc.

Gate Keeper Approach

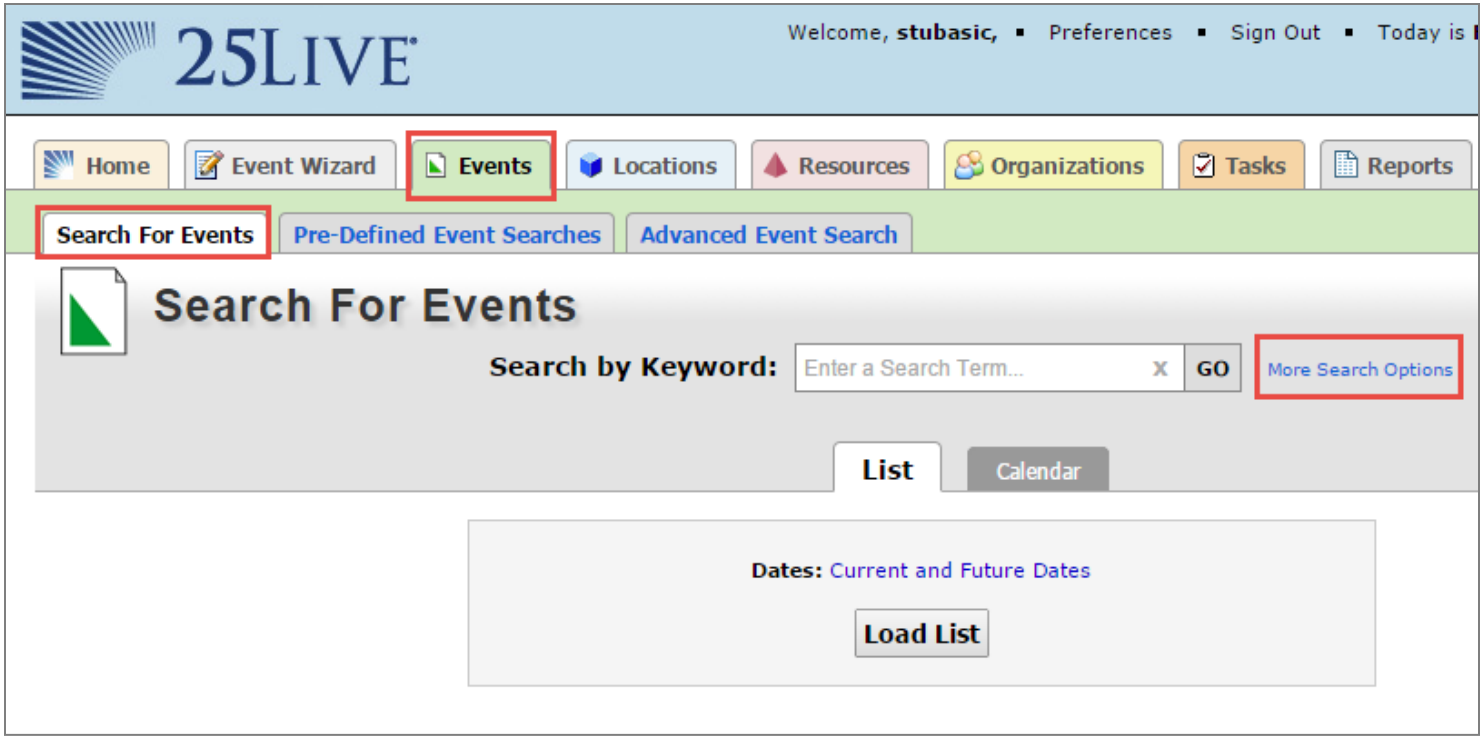
- Event is submitted by requestor as a Draft event
- No Tasks are generated
- Location and Resources are saved as Event Preferences
- Event must be manually searched for and edited for objects to be submitted to scheduler or assigned



© 2015 CollegeNET, Inc.

Gate Keeper Approach

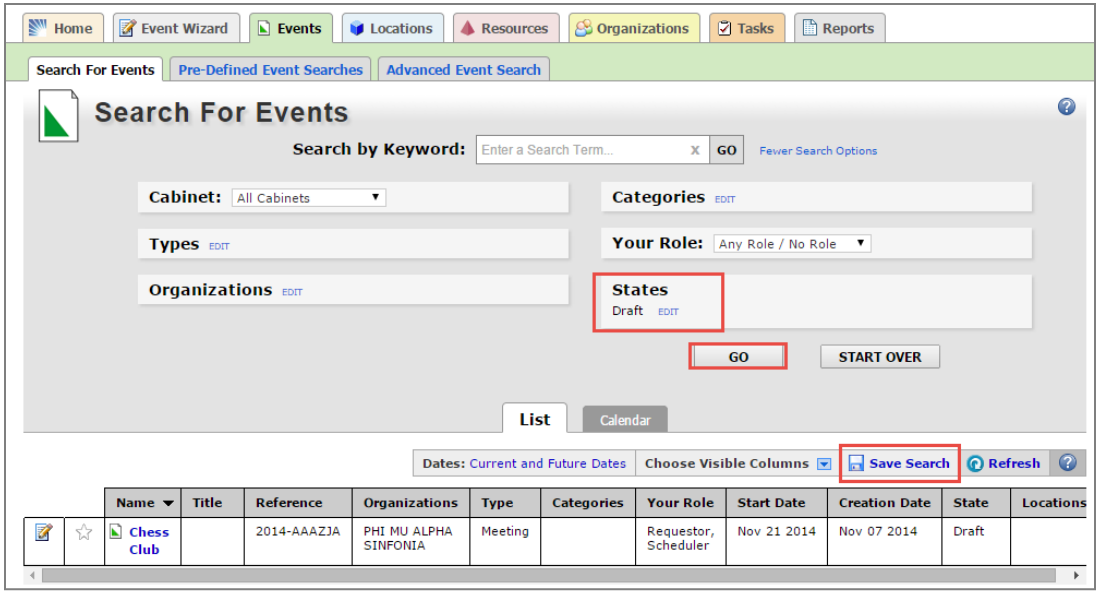
- Search by Event Drafts
  1. Log into 25Live
  2. Click Events Tab
  3. Search for Events – More Search Options



© 2015 CollegeNET, Inc.

Gate Keeper Approach

- Search by Event Drafts (cont)
  4. States -> Edit -> Drafts
  5. Go
  6. Save Search for future use
     - NOTE: When saving search save it as a Search Criteria and Select ‘Add this to Your Starred Searches’ so it shows on Dashboard



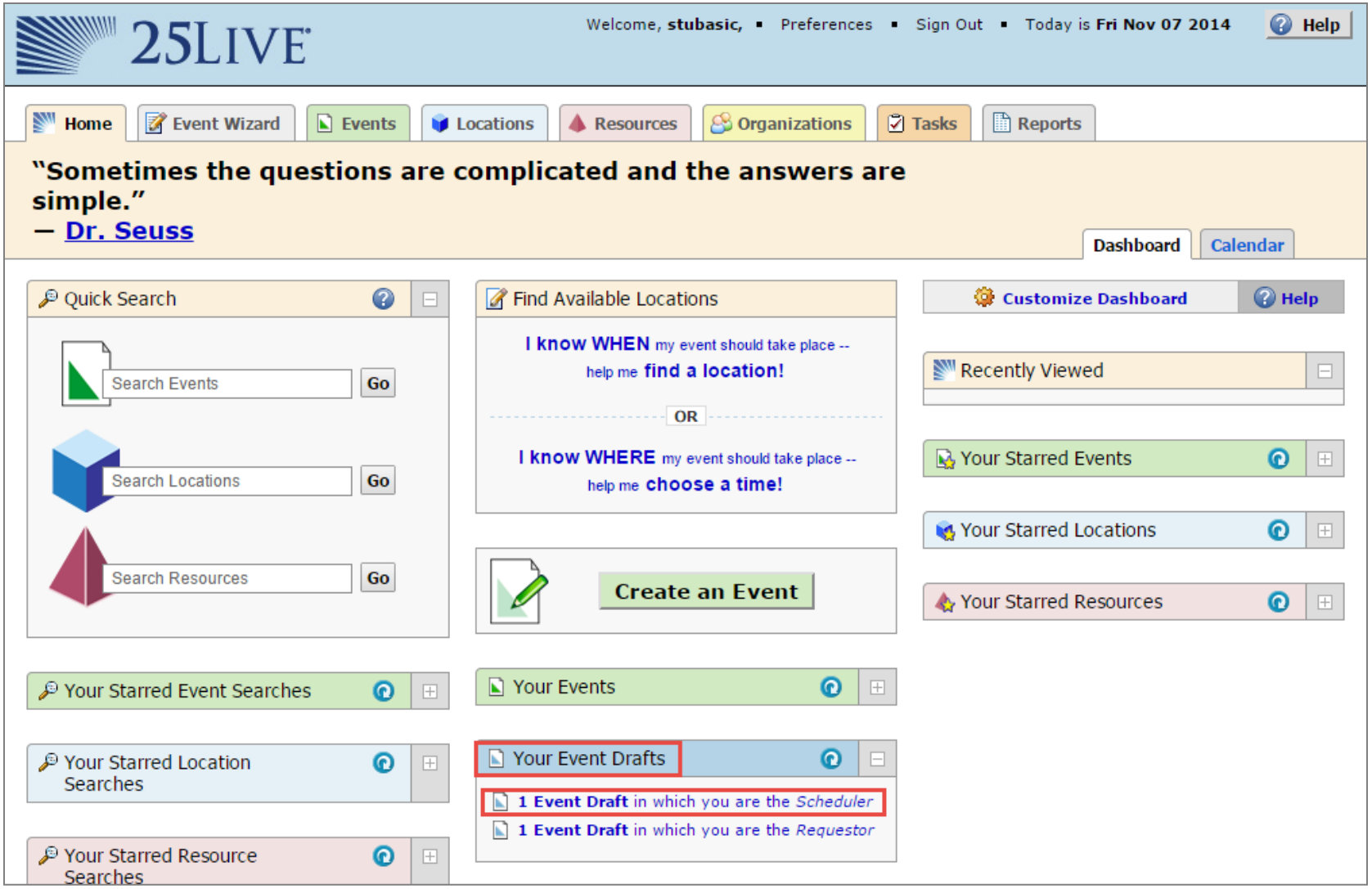
© 2015 CollegeNET, Inc.

Default Scheduler and Location Scheduler Approach

- Event is submitted by requestor as a Draft event and application automatically changes Scheduler's name
- No Tasks are generated
- Location and Resources are saved as Event Preferences
- Event in which you are listed as scheduler can be found on the Home – Dashboard view

© 2015 CollegeNET, Inc.

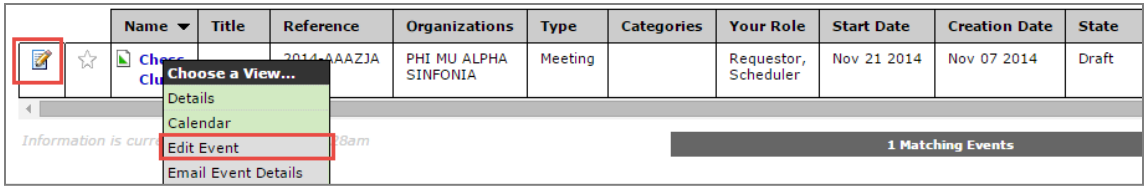
Default Scheduler and Location Scheduler Approach

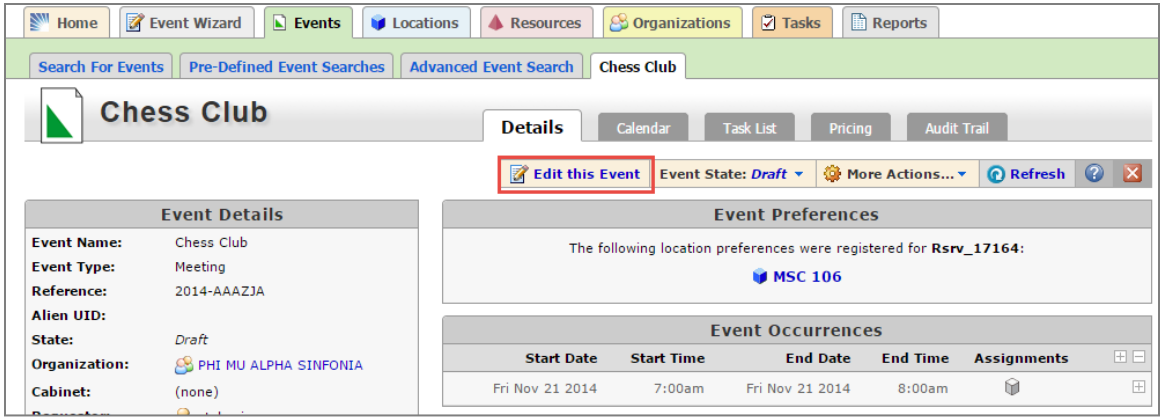


© 2015 CollegeNET, Inc.

Editing Drafts

- All Event Drafts must be edited
- Selecting the edit icon
- Right-click on event name and select edit
- Select edit when looking at the individual event





© 2015 CollegeNET, Inc.

Processing Events – Editing Drafts

- When editing an event Draft one is able to adjust the Event Type selected
  - **NOTE**: Event Custom Attributes maybe affected if different list exists for the new Event Type selected
- If Editing the Date / Time field then ensure that the original preferred Location and / or Resources are still available
- Change event state from Draft to Tentative or Confirmed to generate any Tasks associated with event
  - NOTE: If one does not have the rights to assign preferred Location or Resource then an approval request will go to the appropriate group

© 2015 CollegeNET, Inc.

Copyright © 2015 CollegeNET, Inc. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted for the personal use of an authorized user, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form by any means, electronic, mechanical, photocopying, recording, or otherwise without the prior written permission of CollegeNET, Inc.

Information in this document is subject to change without notice. Although every precaution has been taken in the preparation of this document, CollegeNET, Inc. takes no responsibility for errors or omissions.

Unless otherwise noted, any organization, product, person, or event depicted in an example herein is fictitious, and no association with any real organization, product, person, or event is intended or should be inferred.

CollegeNET, R25, Schedule25, Series25, 25Live and X25 are registered trademarks of CollegeNET, Inc. All other trademarks are the property of their respective owners.

CollegeNET, Inc.
805 SW Broadway, Suite 1600
Portland, OR 97205
(503) 973-5200
corp.collegenet.com