Creating an Event Using 25Live Pro

TEXAS WOMAN'S UNIVERSITY
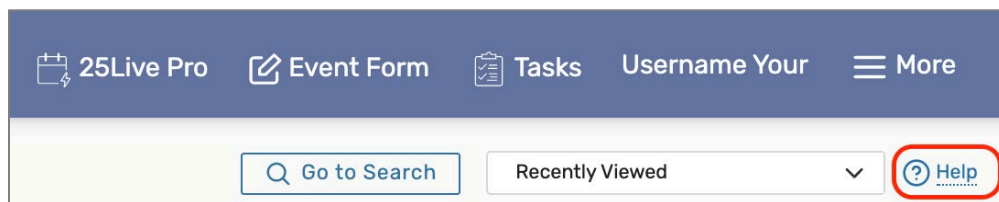
Using the Online Help

Keep in mind that all users can always consult the online help for more information at https://knowledge25.knowledgeowl.com/help/product-help. Or, use the Help link in the upper right of the page to access all Help topics, or click the Help icon (⌀) throughout the application tool. You must be signed in to access 25Live Pro online help.

Security Note

System security determines whether you can create or request events. Ask your system administrator if you're unable to perform any functions you think should be available to you.

Accessing the 25Live Pro Event Form

About Creating Events

Users need to sign in with a valid username/password to create an event. As the creator of an event, you may be performing either of these roles:

- **The Scheduler** with specific security permissions to save the event to the database and assign/request locations and resources

  OR

> • **The Requestor** with limited permissions to complete the event, who can expect, for example, that location and resource assignments (and the event itself) might be submitted to others for completion

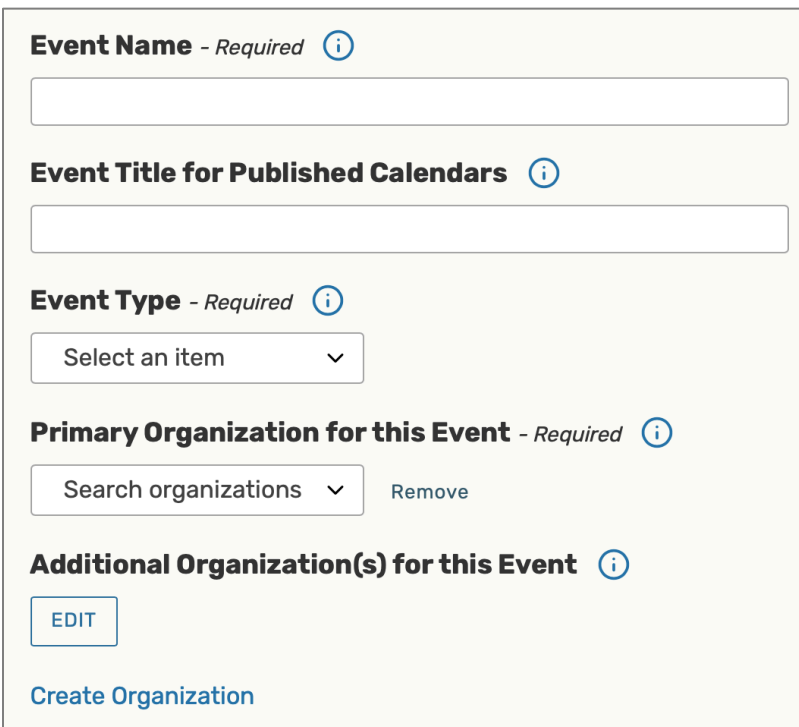Take one of the following actions to start creating an event:

📅 **25Live Pro**   📝 **Event Form**   📋 **Tasks**   **Username Your**   ☰ **More**

Image: Use the Event Form link in the top navigation bar to start creating an event.

- Use the **Event Form** link in the top navigation bar

  OR

- Use the **Create an Event** button on your 25Live home dashboard

  OR

- Choose an option in the **Find Available Locations** area of the 25Live home dashboard to start from a required time or location, if that section is present

  OR

- Select the Create event create event (📝) icon in a calendar view, availability view, or search results

  OR

- Use the **Create an Event in this Location** option in the More Actions menu when viewing Location Details
- Use the **Create an Event that uses this Resource** option in the More Actions menu when viewing Resource Details

Stepping Through the Event Form

1. Enter Basic Information

- Enter an Event Name, Event Title, select an Event Type, and complete the Primary Organization. If any of these fields are required, they are labeled as such.
- Web calendars (if set up for your 25Live instance) and searches display the Event Name.
- Permissions determine which Event Types you can choose from. Your chosen Event Type determines some options that appear later in the form.
- Some fields in this section search ahead as you type in them.

Event Name - *Required* ⓘ

[   ]

Event Title for Published Calendars ⓘ

[   ]

Event Type - *Required* ⓘ

[Select an item   ⌄]

Primary Organization for this Event - *Required* ⓘ

[Search organizations ⌄] Remove

Additional Organization(s) for this Event ⓘ

[EDIT]

Create Organization

Image: Required fields are labeled on the Event Form.

You can Edit or Remove the Primary Organization or Additional Organization if displayed. If you cannot find the right organization, use the **Create Organization** link, if you have security permissions to do so.
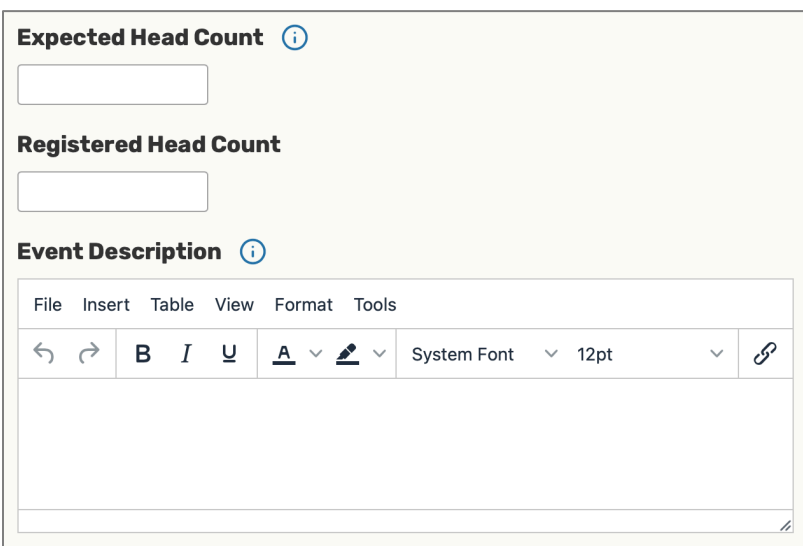
> **Tip: The Information Icon**
>
> Use the information (ⓘ) icon to view additional help and/or instructions for any field that displays it. Some help section may be open to read by default, depending on your instance and configuration.

2. Enter Attendance Information and Description

- **Expected Head Count**

- **Registered Head Count**

  - 25Live can use the expected or registered head count to find locations that can hold your event.

- **Event Description**

  - The Event Description can appear on web calendars if you intend to publish your event.

Image: The Event Description field allows you to format text with a variety of options.

> **Tip: Use the Left Side Navigation to Move Around**
>
> The Event Form features convenient side navigation to the left of the sections and fields.

Image: Use the navigation along the left side of the screen to move between sections of the Event Form.

3. Enter Information About Your Event's First Occurrence

Specify the date and times of the first occurrence of the event. If your event occurs on multiple days, you'll describe how it repeats in the next section.

Image: Use the Additional Time section to add extra time to events, see Adding Additional Time to Events.

You have the option to create a single occurrence of a multi-day event by using the checkbox for **This event begins and ends on the same day**. When the box is unchecked, you can choose an end date, however, be aware that if this is a repeating event every subsequent occurrence will have the same multi-day duration.

If the event requires Setup/Pre-Event and/or Post-Event/Takedown time, select the options you need by opening the **Additional time** display, then set the number of days, hours, or minutes needed. See the Adding Additional Time to Events help topic.
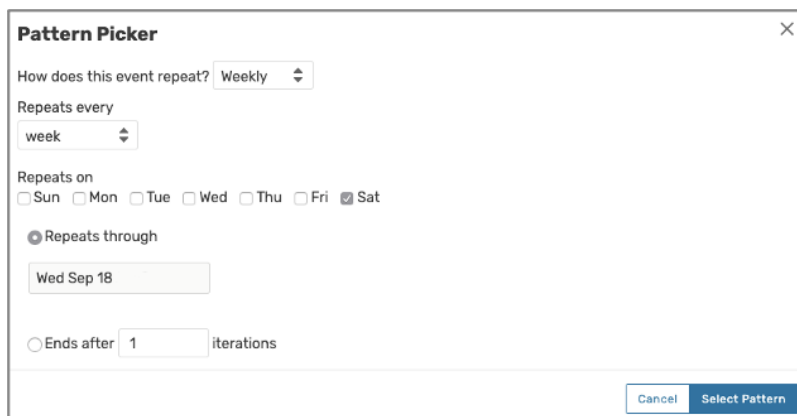
> 🔑 **Security Note**
>
> System configuration and security determine whether you can use Setup, Pre-Event, Post-Event, and Takedown times for events. Ask your 25Live administrator if you're unable to perform functions you think should be available to you.

4. Optionally Choose How Your Event Repeats

If your event has more than one occurrence, select how the event repeats. 25Live allows you to create repeating events defined as either ad hoc/random dates or as a pattern (daily, weekly, monthly).

- Tap or click on dates on the calendar to create random (or ad hoc) repeat occurrences
  - You can also add additional, random dates after selecting and defining a pattern
- *Or* use the **Repeating Pattern** button to select the pattern type (including ad hoc dates) and complete its options, then use the **Select Pattern** button to save your choices

See the Creating Repeating Events help topic for details.

Image: Choosing the repeat pattern for your event determines additional options.

5. Select Location(s)

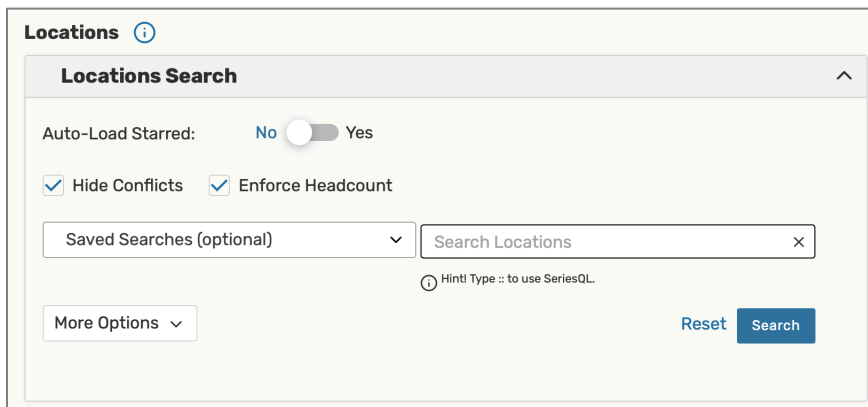> 💡 **Tip: Location and Resource Section Can Collapse**
>
> To help you view information more efficiently, you can expand or collapse the Location and Resource sections.

Start with a Saved Search or search for suitable locations by location name.

- Use the **More Options** dropdown to add additional search parameters, such as Categories, Features, Layouts, and Capacity
- Check the **Hide Conflicts** or **Enforce Headcount** boxes to narrow results
- To use SeriesQL for an advanced search, start typing two colons ::

As you search, 25Live checks for the availability of location(s) at your specified dates/times.

- Use links in the **Conflict Details** column to view more information about location conflicts
- The links on location names allow you to view location details

Image: Use the checkboxes above the search options to narrow results.

Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available locations for your event. A selected location appears as a pending assignment in event details and in the location availability grid until you save the event.

Location Occurrence Editing

25Live allows you to adjust settings per occurrence for each requested or reserved location. After adding a location, collapse the search, then use the **View Occurrence**s link to add instructions, specify layouts, and additional options.

Image: There is a View Occurrences button on every requested/reserved location block.

See the Adjusting and Editing Individual Event Occurrences help topic for more detail.

Image: Settings for location per occurrence.

Customization Note

Depending on how your 25Live environment has been configured, assigning a location to your event may automatically assign the "Location Scheduler" to the Scheduler contact role for the event, or a Default Scheduler may be assigned based on your security group. (The Location Scheduler is specified for a location in the Administration Utility and displayed in location details on the 25Live Locations tab.)

Your institution's business processes determine how you can proceed with submitting your event request when the event is auto-assigned another scheduler. If your user does not have permissions to view Contacts, some roles may not display.
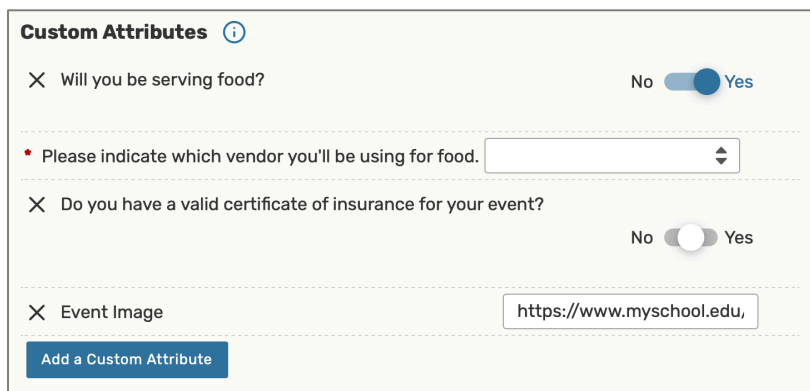
6. Attach File(s)

If your institution has configured and allowed file attachments for events, use the **Upload a file** button to optionally attach one or more files.

- You can attach up to 5 files
- Files may not exceed 25MB
- Allowed file types:
  - PDF, TXT, RTF
  - JPG, JPEG, PNG, GIF
  - DOC, DOCX
  - XSL, XSLX, CSV

You may also use this section to remove previously attached files from the event.

7. Enter Custom Attributes (If Displayed)

Select and enter values for any available custom attributes that are pertinent to your event. Custom attributes are different for each instance of 25Live. Use the No/Yes toggle(s) to add and complete any custom attributes.

Image: Examples of custom attributes.
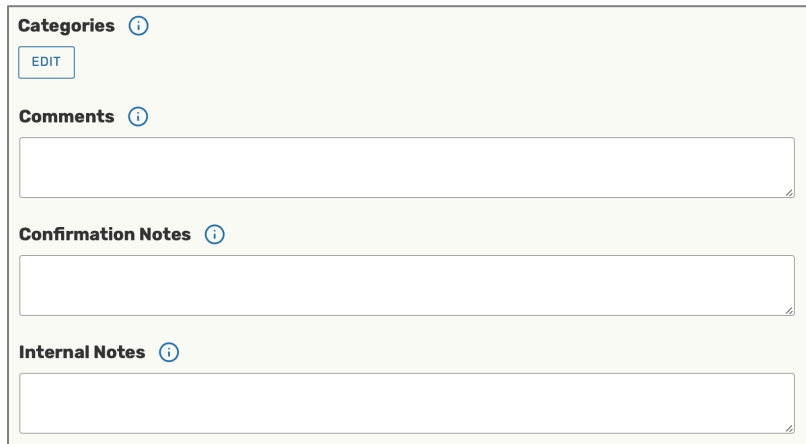
> **Note: Some Sections Need an Event Type to Display**
>
> If you do not see the Custom Attributes or Contact Roles sections, make sure you have selected an Event Type above. Additionally, some Event Types may not be configured to display these fields.

8. Select Contacts

Select the contacts associated with the event. To specify a contact, use the dropdown icon, enter a few letters of the contact's name, and select it when the full name displays. You can also add a contact by using the **Create** button then completing the displayed fields.

9. Complete Categories, Requirements, Calendars, Comments, and Notes

Image: Sections and fields for Categories, Requirements, Calendars, and Comments depend on how your 25Live instance is configured.
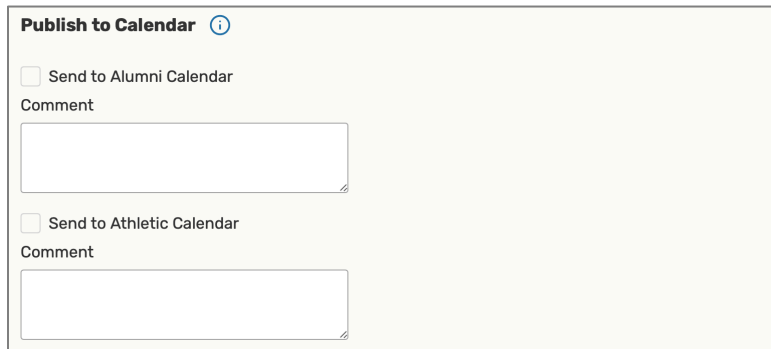
Across the next sections, you may see choices for categories, requirements, and calendars, comments, and notes depending on how the Event Form has been customized for your institution, 25Live instance, and security group.

Image: Use the Publish to Calendar options to set up this event in 25Live Publisher.

- **Categories:** Select the categories the event belongs to. Categories help other users find events when searching and can determine if your event displays on web calendars

- **Requirements:** Use the toggle to add pertinent requirements, such as a liquor license or a contract, and add comments or quantity information as needed

- **Calendars:** If you are promoting your event on one or more web calendars, choose the calendar(s) here, and enter comments as needed

- **Comments and Notes:** Enter appropriate comments and/or notes for the event and keep important information at the top
  - Event Comments can be seen by most users
  - Confirmation Notes are shown in Confirmation Reports
  - Internal Notes can be seen only by people who are event contacts, like Requestor and Scheduler

> **Comment and Notes Fields are Limited**
>
> Comment and notes fields are limited to approximately 32,000 characters. To prevent truncated text:
>
> - Summarize email conversations rather than copying entire email threads into comment fields
> - Limit or omit long HTML code insertions

10. Choose an Event State

Choose the appropriate state of your event. A few notes about event states (for more details, see the Choosing an Event State help topic):

- You have the option to set your chosen event state as your default for creating new events
- You may be required to save your event as a Draft, in which case any locations and/or resources you've requested will be saved as preferences, not assignments
- Tentative and Confirmed events can have assigned locations and resources
- The Denied, Cancelled, and Sealed event states are not available for new events and cannot be set as your default event state

If you're the event Scheduler or Requestor and you're able to save your event in a Tentative or Confirmed state, you become the event owner, with the right to edit, copy, or delete the event (unless a senior scheduler takes ownership of the event).

11. Agree to Terms and Conditions

Check the agreement box. You must agree to your institution's terms and conditions (if presented) before your event can be saved.

> **Reminder: You May Not See All Sections**
>
> Your event creation environment may not include all the sections and fields mentioned, depending on how 25Live has been set up for your instance and security group.

12. Select a Heading

Choose Event Heading ×

Under which heading would you like to save this event?

○ Administrative
◉ Athletic
○ External
○ Internal
○ Special Event
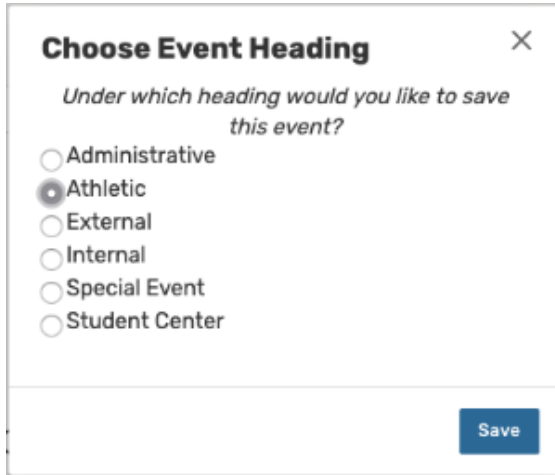○ Student Center

Save

Image: Example of heading choices. The options will differ in your 25Live instance.

If your 25Live instance is set up to require it, you may need to choose the appropriate heading for your event. The heading determines the context for event storage (the cabinets and folders set up by administrators) and the access rights to the event by various 25Live security groups.

If you select "I Don't Know," your event will be saved as a Draft, and location and resource assignments will be removed but saved as preferences until the Draft state is changed.

> **Tip: Preview Your Event**
>
> The **Preview** button is available to see a summary of your event at any time, except during saving. The preview also allows you to jump to different Event Form sections to edit information and settings.

13. Choose Post-Saving Options

Convenient options are presented to allow you to choose your next action after saving your event in the **After Saving This Event** section.

- Go to Event Details (see the Viewing Event Details help topics)
- Create Another Related Event (see the Creating Related Events help topics)
- Create a Related Copy of This Event (see the Copying Related Events help topics)

14. Save Your Event

Use the **Save** button to complete event creation.

> **Warning: The Cancel Button Will Not Save Changes**
>
> The **Cancel** button is always available at the bottom of the Event Form alongside **Preview** and **Save**, but be aware that using **Cancel** will not save any completed fields or changes.

Additional Tips

- When you submit an event with a location or resource that you don't have permission to assign, the Event Preferences area in the Occurrences area of the event details view lets you know that the assignment has been saved as a preference and an assignment task request has been issued for the item.

- When you save an event in the Draft state, any location or resource assignments are saved as event preferences only. The locations or resources themselves are released for other assignments.

- The event reference number is displayed when the event is saved. You can use this later to quickly find the event.