Creating an Event Using 25Live Pro

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 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

  **OR**

- **The Scheduler** with specific security permissions to save the event to the database and assign/request locations and resources
Take one of the following actions 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.
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You can Edit or Remove the Primary Organization or Secondary Organization if displayed.

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.
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.
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, then set the number of days, hours, or minutes needed. See the [Adding Additional Time to Events](#) help topic.

### 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.
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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 Locations with 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 the Conflict Details link to view more information about location conflicts
- The links on location names allow you to view location details

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 Occurrences 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.
6. Select Resource(s)

Start with a saved search or search for desired resources by name.

- Use the **More Options** dropdown to add additional search parameters, such as Categories
- To use SeriesQL for an advanced search, start typing two colons ::
- As you search for them, 25Live checks automatically for the availability of the resource(s) at your specified dates/times
  - Use the **Conflict Details** link to view more information about resource conflicts
- Columns are also displayed for Stock Total and Availability
- The links on resource names allow you to view resource details

![Resources Search](image)

*Image: Extra information about resources is shown in columns.*

Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available resources for your event.
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Resource Occurrence Editing

25Live allows you to adjust settings per occurrence for each requested or reserved resource. After adding a resource, collapse the search, then use the View Occurrences link in the resource block below to add instructions, adjust the quantity, and change occurrence information. A selected resource appears as a pending assignment in event details and in the resource availability grid until you save the event. See the Adjusting and Editing Individual Event Occurrences help topic.

7. Addition Event Information

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.
9. 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.
10. Complete Comments

**Event Comments**

Please outline any special needs or information to further clarify your event. List any special set-up or layout instructions, resources needs, or special accommodations.

- **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

**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

12. Agree to Terms and Conditions

Check the agreement box. You must agree to your institution’s terms and conditions before your event can be saved.

**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.

14. 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)
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- Create Another Related Event (see the Creating Event Relationships help topics)
- Create a Related Copy of This Event (see the Copying Related Events help topics)

15. 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.

Using the Online Help

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