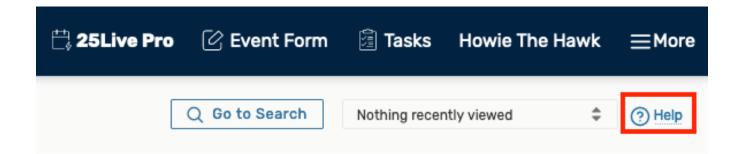# Creating an Event Using 25Live Pro

Using the Online Help

Keep in mind that all users can always consult the online help for more information at the [Series25 Help and Customer Resources](#) site or use the Help link in the upper right of the page to access all Help topics or click the Help icon (⑦) throughout the application tool. You must be signed into 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 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

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

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

Tip: Did you know you can use 25Live on your Mobile Devices.
Some areas on camps use QR Codes so you can view the location availability

Submitting an Event Through the Event Form

1. Enter Information About Your Event

- Enter an Event Name, Event Title, select an Event Description to promote your event.
- The Event Title for UHart Web Calendars is not a required field but when entered will replace the Event Name on the Web Calendars.
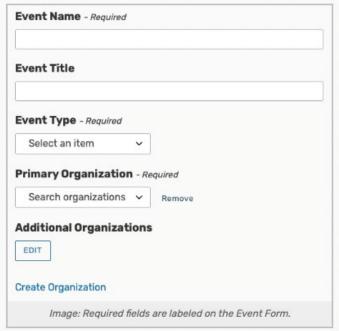
Event Name - *Required*

Event Title

Event Type - *Required*

Select an item ∨

Primary Organization - *Required*

Search organizations ∨   Remove

Additional Organizations

EDIT

Create Organization

Image: Required fields are labeled on the Event Form.

Image: Event Name, Title, Event Type and Organizations

2. Select the Event Type

- Select the type that most closely matches your event.
- Permissions determine which Event Types you can choose from. Your chosen Event Type determines some options that appear later in the form.
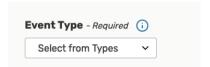
Event Type - *Required* ⓘ

Select from Types ∨

Image: Choosing an Event Type

✓ **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.

3. Enter Primary Organization

Primary Organization for this Event - *Required* ⓘ

Search organizations ⌄   Remove

Image: Entering a Primary Organization

4. Enter Attendance Information and Description

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

Expected Head Count - *Required* ⓘ

Enter the maximum number of people you anticipate will attend this event. This expected head count is necessary to ensure that the space requested is the appropriate size for the event.

Image: Entering an Expected Head Count

- **In the Description Field**

Do not include the date/time/location of your event. The description of your event should include the following (if applicable)
- a concise but detailed description of the event
- registration information or link *(use insert/edit link button above the description field)*
- a link for more info or event website *(use insert/edit link button above the description field)*
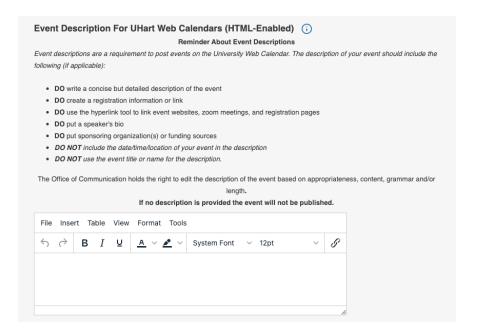- speaker's bio
- sponsoring organization(s) or funding sources

Image: Event Description Field

5. 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, then set the number of days, hours, or minutes needed. See the Adding Additional Time to Events help topic.

6. 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.
  - o 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.

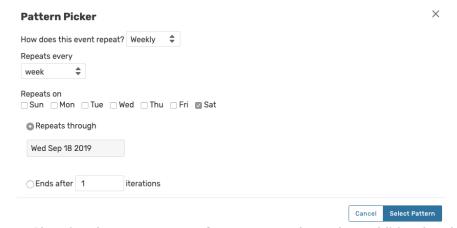See the Creating Repeating Events help topic for details.

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

7. 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.
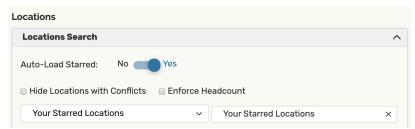- The links on location names allow you to view location details.

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.
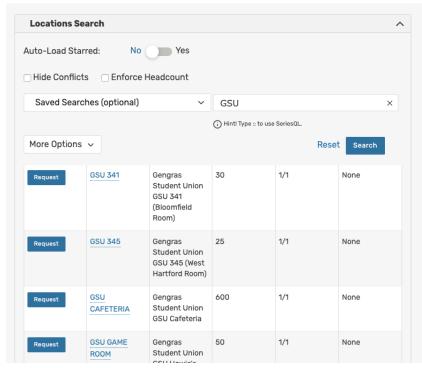

Image: Extra information about locations is shown in columns.

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.

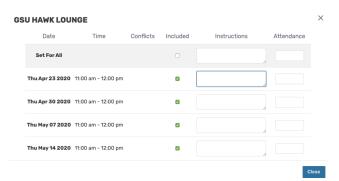See the Adjusting and Editing Individual Event Occurrences help topic for more detail.

Image: Settings for location per occurrence.

8. Additional Required Event Information

Select and enter values for any Required Event Information that are pertinent to your event. Use the No/Yes toggle(s) to add and complete any text fields.
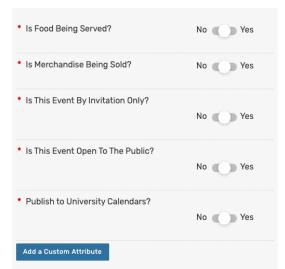

Image: Examples of common custom attributes.

9. 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.
  - o Use the **Conflict Details** link to view more information about resource conflicts.
- Columns are also displayed for Stock Total and Availability.

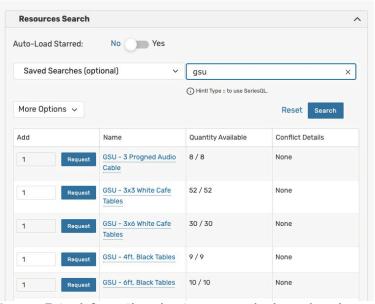- The links on resource names allow you to view resource details.

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.
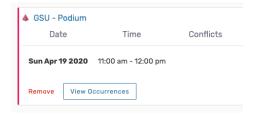

Image: There is a View Occurrences button on every requested/reserved resource block

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.
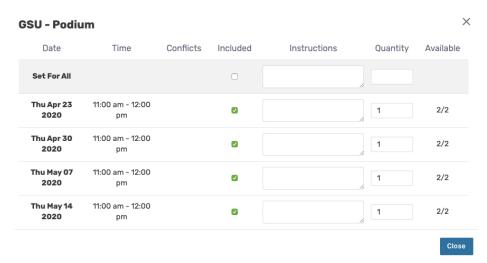
Image: Settings for resources per occurrence.

> **Tip: Resources may automictically populate based on the information entered above from the Required Event Information section.**

> **The Office of Communication holds the right to edit the description of the event based on appropriateness, content, grammar and/or length. If no description is provided the event will not be published.**

10. 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.
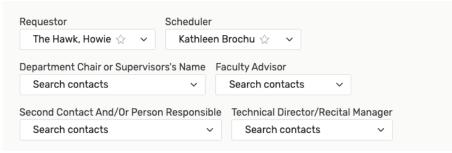

Image: Contact Fields

> **Tip: Some Contacts Automatically Populate**
>
> The Requestor and Scheduler fields are required and will automatically populate on the event form. Do not change the Scheduler Field if present because your event request will be delayed from being processed.

11. 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.

Image: Comment Field

- **Comments and Notes:** Enter appropriate comments and/or notes for the event and keep important information at the top.
  - o 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.

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 Event Relationships 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.

After saving your event, the notifications box will display the location or locations you have requested as well as the message, "Your request has been successfully submitted. Your event is not confirmed until you receive a confirmation email from a University Scheduler/Location Approver." At this point, your request is just a request, and a location has not been reserved. Your request will be reviewed by a University Scheduler/Location Approver who will either assign or deny the location.
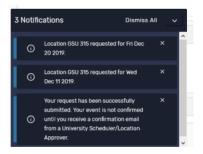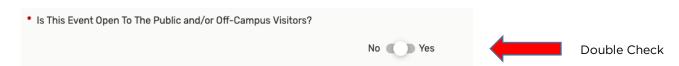

Image: Notification

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.

Resolving Error Messages on the Event Form

- If a **required field** is skipped, the event form will indicate this with the red box around the missed field. Typically skipped is a No/Yes question in the Required Event Information area:

If you see the message: Please enter a value for required custom attributes. Double check all the fields with the Red Asterisk *:

Double Check

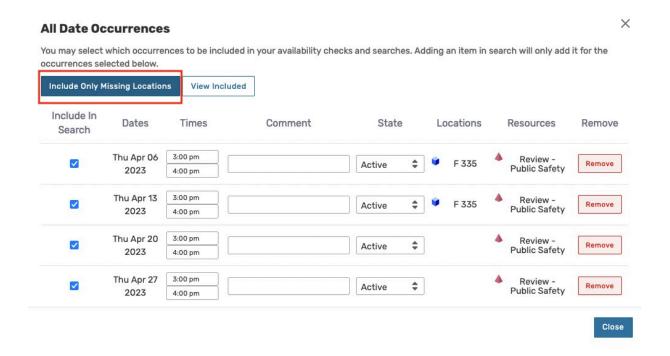**You do not need to click to Add any other Custom Attributes:**

If you see the message: Please enter a value for required fields (Locations). Click 'View All Occurrences' to find dates with a missing location.

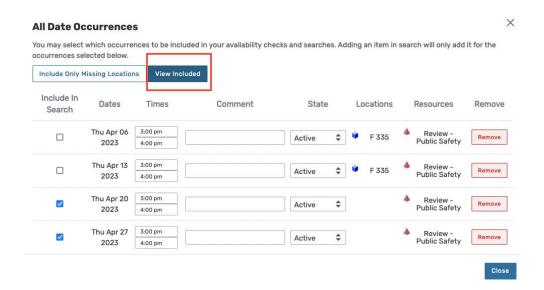1. Click 'View All Occurrences' on the Date Picker

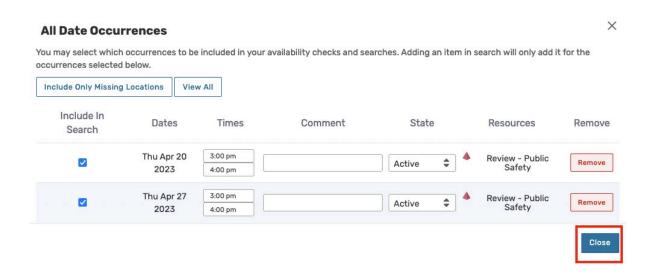2. The Click 'Include Only Missing Locations'

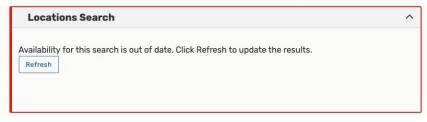

3. The Click 'View Included'

4. This is the then show only dates without a location. The click Close.

5. The Refresh Location and look for Available Locations.

6. Then Request the location(s) and the locations will be added on the dates that were missing locations.

Locations Search ∧

Auto-Load Starred: **No** ⬤ Yes

☐ Hide Conflicts   ☐ Enforce Headcount

Alfred C. Fuller Center ☆ ⌄   Alfred C. Fuller Center ✕

Reset **Search**

Add	Name	Title	Default Capacity	Availability	Conflict Details
Request	F 125	Alfred C. Fuller Music Center 125	4	2/2	None
Unavailable	F 335	Alfred C. Fuller Center 335 – Conference Room	14	0/2	**Conflict Details**

Return to Top

◧ **F 335** Alfred C. Fuller Center 335 - Conference Room **Capacity:** 14 ☆
Included dates:
Thu Apr 06 2023, Thu Apr 13 2023

Remove **View Occurrences**

◧ **F 125** Alfred C. Fuller Music Center 125 **Capacity:** 4 ☆
Included dates:
Thu Apr 20 2023, Thu Apr 27 2023

Remove **View Occurrences**