Creating an Event Using 25Live Scheduling

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 Scheduling 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

25Live Scheduling features an Event Form that conforms to the event configurations that have been set up in the full 25Live application. You access the Event Form via the Create an Event link in the top menu bar. Alternatively, for locations configured to use it, Express Scheduling may be available for simple, one-time events.
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You can also use the Reserve It or Request It buttons (when available) while viewing locations and resources to begin an event from that location or resource. When you use the Reserve It or Request It button, the location or resource (and the date and time you were viewing items for) already completed in the Event Form or Express Scheduling form.

Using the Event Form to Create an Event

Simply scroll down through the Event Form fields and complete all the information for your event.

Required fields have a red asterisk, are outlined in red, and are labeled with text indicating the field is required if they are not completed. When you properly complete a required field, a green checkmark is shown next to it. You must, at minimum, complete all required fields to save your event.

1. Enter Basic Information

Complete your event's most basic information, such as the name, title, and type. The Event Name is used when the event is displayed on web calendars (if set up in your 25Live configuration) and in searches. You may also be able to complete the:

- Event Type
  - This field will determine other choices in the Event Form, such as custom attributes
- Primary Organization (and possibly any Additional Organizations)
- Event Description
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- This value appears on web calendars if you intend to publish this event
- The description field offers the option to toggle between an editor or plain text

**Primary Organization**
Please choose an organization you are a member of.

Search for an Organization

**Additional Organizations**

Search Additional Organizations

**Event Description**

*Image: In addition to the Event Name and Event Type, other basic information fields may be available to complete.*

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**Tip: Formatting Event Description Text**

The Event Description field offers the option to show or hide additional controls to add formatting to your text. Use the **Show/Hide formatting Options** link to toggle the visibility of the formatting bar for bold, italics, underline, font choices, colors, links, indenting, and lists.

2. Enter Information About the First Occurrence

*Image: Initial event date and time fields feature a date picker.*

Specify the date and time of the first occurrence of the event. If your event occurs on multiple days, you'll describe how it repeats later.

You may see an option to check whether or not **The event begins and ends on the same day**. This checkbox allows you to create an event that spans multiple days without break (such as an overnight retreat). For events that span multiple days using separate sessions/occurrences, use the repeating event options instead.

If the event requires extra time, see the help topic about Adding Additional Time to Events ([https://knowledge25.collegenet.com/x/i4ulGQ](https://knowledge25.collegenet.com/x/i4ulGQ)) for more information.
3. Choose If and How the Event Repeats

If this is a single occurrence event, choose **Does Not Repeat**. If this is a multiple-occurrence event, select how the event repeats. See the help topic about Creating Repeating Events ([https://knowledge25.collegenet.com/x/glIIgQ](https://knowledge25.collegenet.com/x/glIIgQ)) for expanded instruction.

If applicable, use the repeat date controls to define the event's repeating pattern or ad hoc dates. Once defined, you see the dates in the **Occurrence List** below.

**Image: For repeating events, the Event Form shows all occurrences in a list for easy reference.**
4. Complete Head Count *(if displayed)*

![Image: The head count fields also offer an "I Don’t Know" choice.](image)

The Expected or Registered Head Count is used by 25Live to find locations that are large enough for your event. Some 25Live Event Form configurations may omit these fields.
5. Select Location(s)

Make selection(s) in the **Locations** section using the **Add Space** button. Saved and public searches are available to choose, including your starred locations, or you can type to search by name. Choose one or more available locations. As you search, 25Live automatically checks for the availability of locations at your specified dates/times.

![Image: Choose a Location display lets you search by name or use a saved search.]

Within the **Choose a Location** display, if any spaces have conflicts, use the number in the **Conflicts** column to view more information.

![Image: Conflict information displays when using the conflict number link.]

You can **Filter Results** from your search to exclude locations with conflicts, to enforce headcount, or you can choose location categories and features to filter by.

![Image: Use the Filter Results options to narrow your search.]
6. Select Resource(s)

Make selection(s) in the Resources section using the Add Resource button. Saved and public searches are available to choose, including your starred resources, or you can type to search by name. Choose one or more available resources. As you search, 25Live automatically checks for the availability of resources at your specified dates/times.

You can Filter Results from your search to exclude unavailable resources or you can choose resource categories to filter by.

**Tip: Adjusting Quantities**

If you need to adjust the quantity of a resource needed for specific occurrences or add instructions to location/resource assignments by date, complete the form's required fields here, then edit the event in 25Live Pro.

8. Complete Custom Attributes (if displayed)

Select and enter values for the custom attributes listed that are pertinent to your event. Custom attributes are often unique to your institution.
9. Select Contacts

Select the contacts associated with the event. If you're not the primary contact for the event, specify who is. To specify a contact, use the dropdown menu to select a starred contact, or enter a few letters of the contact's name, then select it when the full name displays.

Note: Default Schedulers

A scheduler may be automatically assigned to your event. This might be the Location Scheduler for your selected location or the default scheduler for your security group.

10. Comments and Terms and Conditions:

- **Comments and Notes:**
  - Event Comments are displayed for most users
- **Terms and Conditions:** are required, you must agree to your school's terms and conditions before your event can be saved

11. Choose Event State

Choose the appropriate state of your event. For more information, see the help topic about Choosing an Event State (https://knowledge25.collegenet.com/x/houIGQ).
12. Save the Event

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

When your event saves successfully, the confirmation screen gives you options to view the event details, edit the event, or see associated tasks.

**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/cIHWGQ](https://knowledge25.collegenet.com/x/cIHWGQ). Or, use the Help link in the upper right of the page to access all Help topics.

**Additional Notes**

- Upon saving your event, if your instance of 25Live is configured to do so, automated emails may go out to the event’s Requestor and/or Scheduler.
- When you submit an event with a location or resource that you don't have permission to assign, the assignment is saved as a preference and an assignment task request is issued.
- In this application, you can select a location that's being shared, but you can’t initiate a share. You must use 25Live Pro to initiate sharing a location for an event.