

This document is from CollegeNet and has not been updated to our specific setup. The print screens may not look exactly like what you see and there may be screens you cannot see. Please read the help text that appears on the right side of the page when going through the Event Wizard for information specific to our setup.



Creating an Event Using the 25Live Event Wizard

Overview

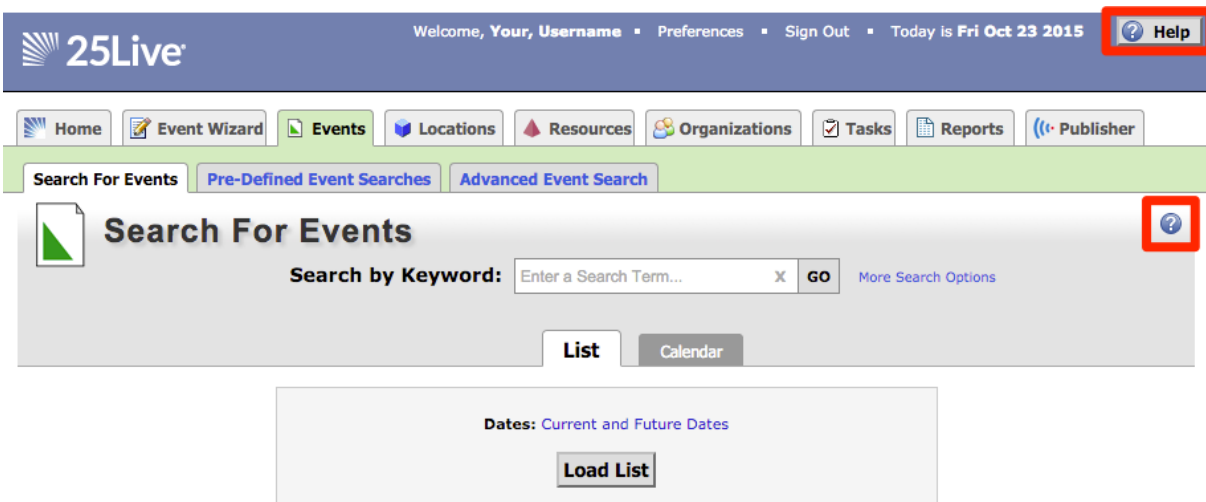
This is a training document that you can modify as needed to show your users how to use the Event Wizard to create an event. You can remove pages in this document describing data elements you don't use in your event creation process and adapt the screen examples to fit your institution.

Note: Your 25Live® environment has been specifically customized to your institution's needs, so the examples in this document may not match your specific details. You can replace the screenshots with those specific to your use of the Event Wizard.

Using the online help

Keep in mind that you can always consult the online help if you have questions about what to do. Click the  **Help** general “Help” button in the upper right of the page to access all Help topics, or click the  Help icon in the navigation bar to access context-specific help for the current view or functional area.

Note: You must be signed into 25Live to access the online help.



Opening the Event Wizard

To start creating an event, click the Event Wizard tab to open the wizard.

The screenshot displays the 25Live web application interface. At the top, a blue header bar contains the 25Live logo on the left and user information on the right: "Welcome, Your, Username", "Preferences", "Sign Out", "Today is Fri Oct 23 2015", and a "Help" button. Below the header is a green navigation bar with several tabs: "Home", "Event Wizard" (highlighted with a red rectangle), "Events", "Locations", "Resources", "Organizations", "Tasks", "Reports", and "Publisher". Under the "Event Wizard" tab, there are three sub-tabs: "Search For Events", "Pre-Defined Event Searches", and "Advanced Event Search". The "Search For Events" sub-tab is active, showing a search interface with a "Search by Keyword:" label, a text input field containing "Enter a Search Term...", a "GO" button, and a "More Search Options" link. Below the search bar are two buttons: "List" and "Calendar". At the bottom of the search section, there is a "Dates: Current and Future Dates" label and a "Load List" button.

Entering basic information

Enter an Event Name, and select an Event Type and Primary Organization. The Event Name is how the event will appear on web calendars (if set up in your 25Live Configuration) and in searches. Permissions determine which Event Types you can choose from.

Start by entering the basic event information.

Event Name
 ✓

Event Title

Event Type
 ☆ ▼ ✓

Primary Organization
 ☆ ✕ ▼ ✓

Additional Organizations
 ▼

Click "Next" to enter additional basic information.

Enter additional basic information

Enter the event's expected head count, its registered head count if you know it, and event description. The Expected or Registered Head Count will be used by 25Live to find locations that can hold your event. The Event Description can appear on web calendars if you intend to publish your event.

Edit additional basic event information.

Expected Head Count

☒ 15

☐ I Don't Know

Registered Head Count

11 ✓

Event Description

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Join us for their monthly Forensic Society meeting. We'll have cupcakes, punch, and plenty to debate.

◀ Back

✕ **Cancel**

📄 **Finish**

Next ▶

Click "Next" to add event occurrence information.

Does the event repeat?

If the event has only one occurrence, select “No;” if it has more than one occurrence, select “Yes.”



Does this event have more than one occurrence?

No

This event has only one occurrence.

Any other related events are separate and distinct.

Yes

This event has more than one occurrence.

It has daily, weekly, monthly or ad hoc repeats, and they are all part of the same event.

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Next ▶

✖ Cancel


📁 Finish

Click “Next” to set the event start/end date and time.

When is the 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 later. If your event has multiple occurrences that happen at different times, you'll need to create separate events for each time. You can then connect those events to each other later using Manage Related Events functionality.


If the event requires Setup/Pre-Event and/or Post-Event/Takedown time, select the option you need, then set the number of days, hours, or minutes needed.



Edit the initial DATE and TIME.
Repeat occurrences can be edited on the next page.

*Select the dates and times of the **actual event**.
Setup, takedown, pre- or post-event times can be specified below.*

Event Start: Wed Jan 04 2012  4:00 pm

Event End: Wed Jan 04 2012  6:00 pm

Does this event require Setup or Pre-Event time? ☒ **Yes** ☐ **No**

Setup: 0 Days 1 Hours 30 Minutes

Pre-Event: 0 Days 0 Hours 0 Minutes

Reservation Start: 2:30 pm

Does this event require Post-Event or Takedown time? ☒ **Yes** ☐ **No**

Post-Event: 0 Days 0 Hours 45 Minutes

Takedown: 0 Days 0 Hours 0 Minutes

Reservation End: 6:45 pm


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Next ▶

✖ Cancel
💾 Save

Click "Next" to set up multiple event occurrences, or if the event has only one occurrence click "Next" to select the event's Location.

How does the event repeat?

If your event has more than one occurrence, select how the event repeats.

**Choose how this event REPEATS.**



Ad Hoc Repeats
Individually select dates to add to the event.



Daily Repeats
Examples: Repeats every day for 5 occurrences; Repeats every 3rd day through a specific date.

Weekly Repeats
Examples: Repeats every week on Monday and Thursday for 12 occurrences; Repeats every other week through a specific date.

Monthly Repeats
Examples: Repeats every month on the 1st and 15th through a specific date; Repeats every 3rd Monday of the month for 6 occurrences.

Does Not Repeat
This event has only one occurrence.


 

Click "Next" to set the event's occurrence dates.

Define the exact dates of the event

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 at the bottom of the page.



Describe how this event REPEATS.

Monthly Repeats ▾

Repeats every month ▾

☐ Repeat by Day

☒ Repeat by Position
 Repeat on the Third ▾
Monday ▾ ✕

☒ Repeats through Mon 06/15/2015 

☐ Ends after 1 iterations

Occurrence List		
Date	Comments	Status
Mon 12/15/2014	<input style="width: 90%;" type="text"/>	Active ▾
Mon 01/19/2015	<input style="width: 90%;" type="text"/>	Active ▾
Mon 02/16/2015	<input style="width: 90%;" type="text"/>	Active ▾
Mon 03/16/2015	<input style="width: 90%;" type="text"/>	Active ▾
Mon 04/20/2015	<input style="width: 90%;" type="text"/>	Active ▾
Mon 05/18/2015	<input style="width: 90%;" type="text"/>	Active ▾
Mon 06/15/2015	<input style="width: 90%;" type="text"/>	Active ▾

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Next ▶

✕ Cancel
🏠 Finish

Click "Next" to select the event's location(s).

Select location(s)

Select one or more favorite “starred” locations, or search for suitable locations by location name, saved search, or advanced search. Locations that best fit your head count will appear higher in the list. If you’ve searched, choose one or more available locations for your event.

A red triangle means the location is not available. A green check mark means the location is available. A green box with lines inside means the location is in use, but the event that is using it is willing to share the location.

If you need to un-assign a location for specific occurrences, choose a different layout, or add setup instructions, click “View and Modify Occurrences” on the right and perform the required task(s).

Add, remove or edit LOCATIONS.

★ **Your Starred Locations...**

Search by Location Name...

macey

BALLROOM C Macey Ballroom C Max Capacity: 60	✓
CY1001 Cheyenne - Main Building - 1001 Max Capacity: 34	⚠
CY1031 Cheyenne - Main Building - 1031 Max Capacity: 34	⚠
CY1033	✓

☐ Show only my authorized locations that have no time conflicts [Refresh](#)

☒ Enforce head count

Saved Searches...

Advanced Search...

Selected Locations

BALLROOM C ✓ ☆ ✕

Macey Ballroom C

Max Capacity: 60

Features: None

Subdivision Of:

BALLROOM

Selected Occurrences: All Occurrences

Conflicts: None

View and Modify Occurrences

◀ **Back** **Next** ▶

✕ **Cancel** **Finish**

Click “Next” to select the event’s resource(s).

Select resource(s)

Select one or more favorite “starred” resources, or search for resources by resource name, saved search, or advanced search. If you’ve searched, choose one or more available resources for your event.

A red triangle means the resource is not available. A green check mark means the resource is available.

If you need to adjust the quantity of a resource needed for specific occurrences, un-assign a resource for specific occurrences, or add setup instructions, click “View and Modify Occurrences” on the right and perform the required task(s).

Find and select RESOURCES.

★ Your Starred Resources...

🔍 Search by Resource Name...

AV

AV - 32" Flat Screen TV	✓
AV - 42" Flat screen TV	✓
AV - Blu-ray player	✓
AV - Computer Technician	✓
AV - DVD Player	✓
AV - Data Connection	∞
AV - Data Projector	✓

Refresh

Saved Searches...

Advanced Search...

◀ Back

Next ▶

✖ Cancel

📄 Finish

Selected Resources

▲ AV - DVD Player ✓ ☆ ✖

Selected Occurrences: All Occurrences

Conflicts: None

View and Modify Occurrences

Or, for single occurrence events.

Selected Resources

▲ AV - DVD Player ✓ ☆ ✖

Selected Occurrences: All Occurrences

Conflicts: None

Setup Instructions:

Avail/Total: 5/5

Quantity: 1

Click “Next” to select the event’s custom attributes.

Enter custom attributes

Select and enter values for the custom attributes listed that are pertinent to your event. These custom attributes, **NAMES GO HERE** are very important when creating events at **YOURSCHOOL**.

Select CUSTOM ATTRIBUTES for this event.

☐ **Custodial Needs**

☐ **Entrance Fee (\$)**

☐ **Entrance Fee for Students (\$)**

☒ **Fee Waiver Approved**
☒ Yes ☐ No

☐ **Fee Waiver Approve By**
No Contact Selected
[EDIT](#)

☒ **Insurance Information Received**
☒ Yes ☐ No

☐ **Insurance on File**
☐ Yes ☐ No

Click "Next" to select the event's contacts.





Select contacts

Select the contacts associated with the event. If you're not the primary contact for the event, you need to specify who is. To specify a contact, click the drop-down icon and enter a few letters of the contact's name, then select it when the full name displays. You can also add a name by selecting "Create New...", and then entering the contact's "Basic Information" and "Email" address.





The scheduler may be automatically assigned to your event depending on security; this might be the Location Scheduler for your selected location or the default scheduler for your security group.

Select CONTACTS for this event.





Scheduler

 Bekka Barrett   
bekbar@collegenet.com

Requestor

 Maya Greene   

Student Organizer

 Becky Becker   
Admin. Asst.

◀ Back **Next ▶**

✕ Cancel **📁 Finish**

Click "Next" to select the event's categories.

Select categories

Select the categories the event belongs to. Categories help other users find events when searching and can determine things, such as whether your event is promoted on web calendars or is student-organized.

Select CATEGORIES for this event.

☐ Academic Event

☐ Admissions Event

☐ Alumni Event

☐ Athletic Event

☐ Catered Event

☐ Closed To The Public

☐ Community Event

☐ Continuing Ed

☐ Cultural Event

☐ Don't Publish To Web

☐ Faculty / Staff Event

☐ Fine Arts Performance

☐ Maintenance

☐ mlp:fim

☐ Non-credit

☐ Open To The Public

☐ Publish to vCalendar

☐ Revenue Producing


☐ Special Events


☒ **Student-organized**

☐ University Activity

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Next ▶

 **Cancel**

 **Finish**

Click "Next" to select the event's requirements.

Add Comments and Notes

Enter appropriate comments and/or notes for the event.

- 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.

Edit additional COMMENTS and NOTES for this event.

Comments

This is sure to be the best forensic event this year.

Confirmation Notes

Club members, please let us know you will attend or not.

Internal Notes

Make sure there is an Alcohol Monitor.

◀ Back**Next ▶**

✕ Cancel**🏠 Finish**

Click "Next" to agree to event terms and conditions.

Choose event state


Choose the appropriate state of your event, then click Finish.


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.


Sealed events can't be changed, except with special security permission.


You're ready to save this event!


 **Draft**
Your Location and Resource selections will be saved as preferences until this event is changed from its Draft state.


 **Tentative**
The event is scheduled, but is awaiting Confirmation from its Scheduler.


 **Confirmed**
The event is scheduled and confirmed.


 **Sealed**
This event is finalized and cannot be edited or changed without sufficient permissions.


 **Denied**
This event has been denied, and all Location and Resource reservations will marked as cancelled.

 **Cancelled**
This event has been cancelled, and all Location and Resource reservations will marked as cancelled.

 **Back**

 **Next**

 **Cancel**

 **Finish**

Click "Next" to select the heading this event should be saved under in the database. If the system can't determine where to store your event, you'll be asked to provide contextual information.