This document is from CollegeNet and has not ben update 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

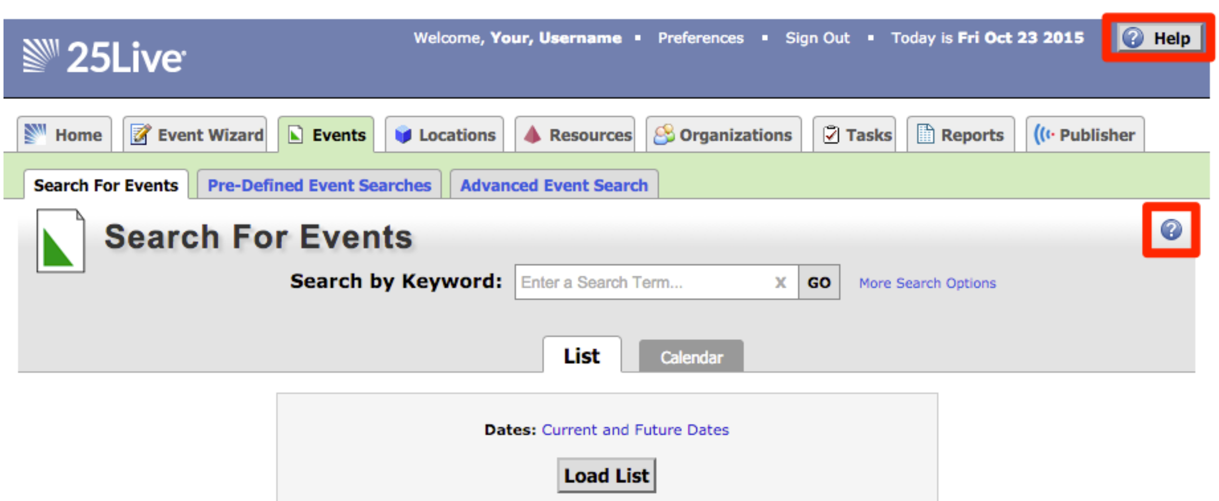
This is a training document that you can modify as needed to show your users how to use the Event Wizard to create an event. You can remove pages in this document describing data elements you don't use in your event creation process and adapt the screen examples to fit your institution.

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

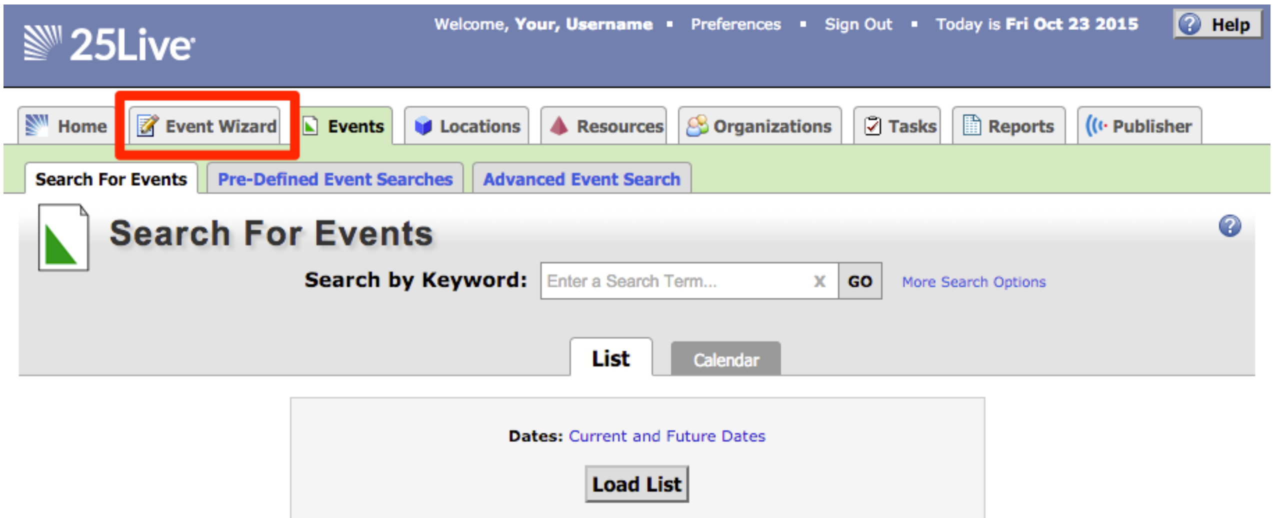
Keep in mind that you can always consult the online help if you have questions about what to do. Click the Help general "Help" button in the upper right of the page to access all Help topics, or click the Help icon in the navigation bar to access context-specific help for the current view or functional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

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



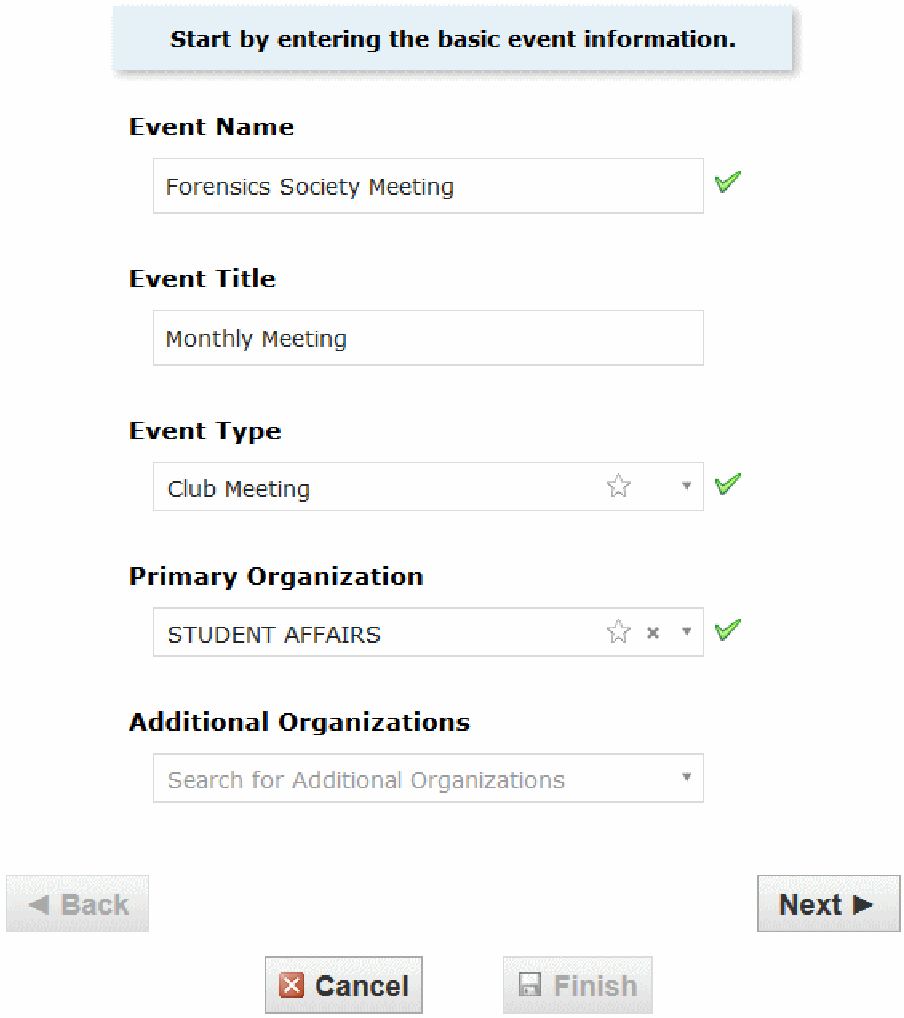
Opening the Event Wizard

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



Entering basic information

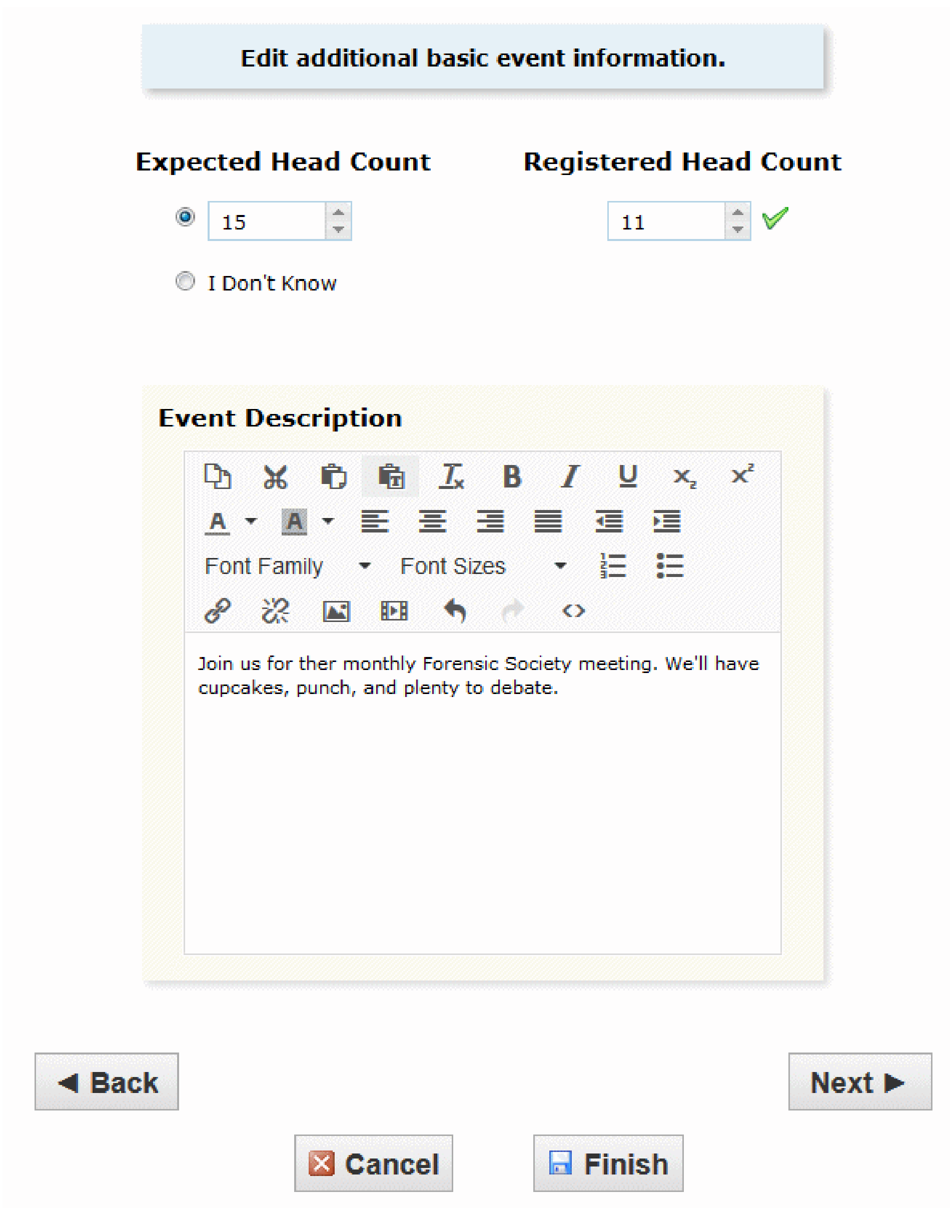
Enter an Event Name, and select an Event Type and Primary Organization. The Event Name is how the event will appear on web calendars (if set up in your 25Live Configuration) and in searches. Permissions determine which Event Types you can choose from.



Click “Next” to enter additional basic information.

Enter additional basic information

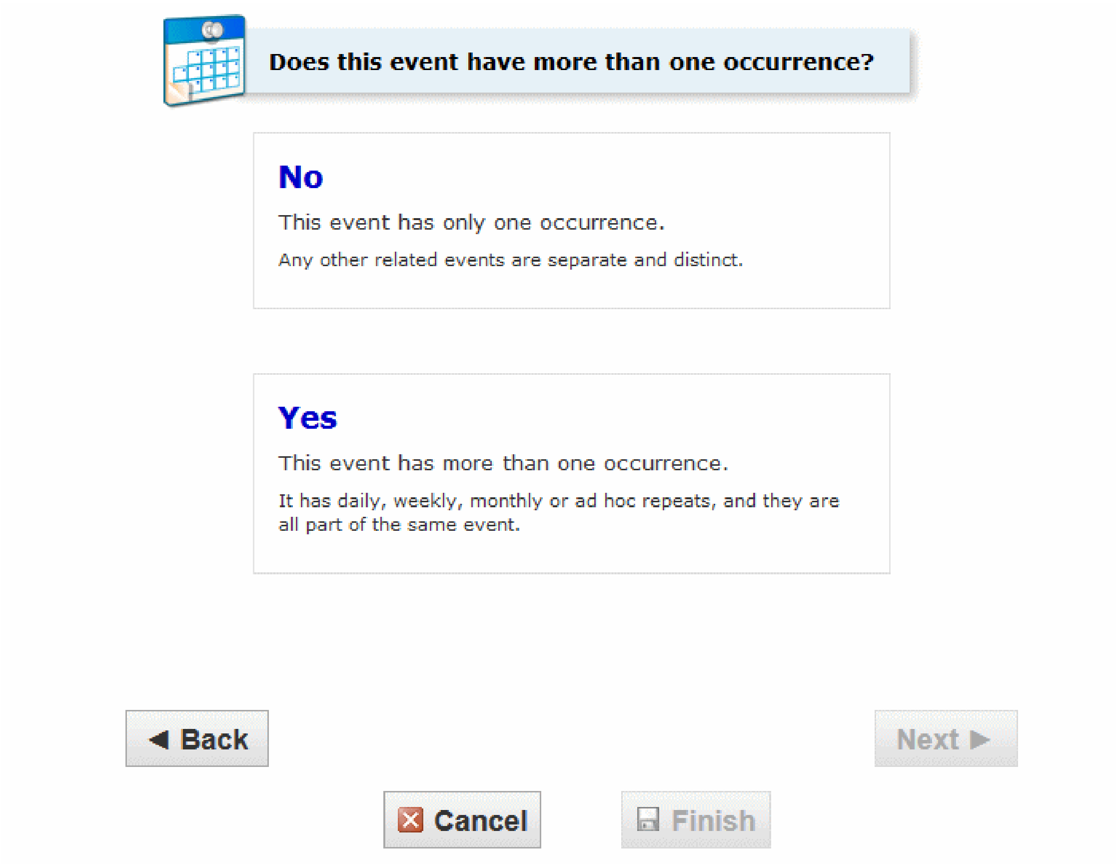
Enter the event's expected head count, its registered head count if you know it, and event description. The Expected or Registered Head Count will be used by 25Live to find locations that can hold your event. The Event Description can appear on web calendars if you intend to publish your event.



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."

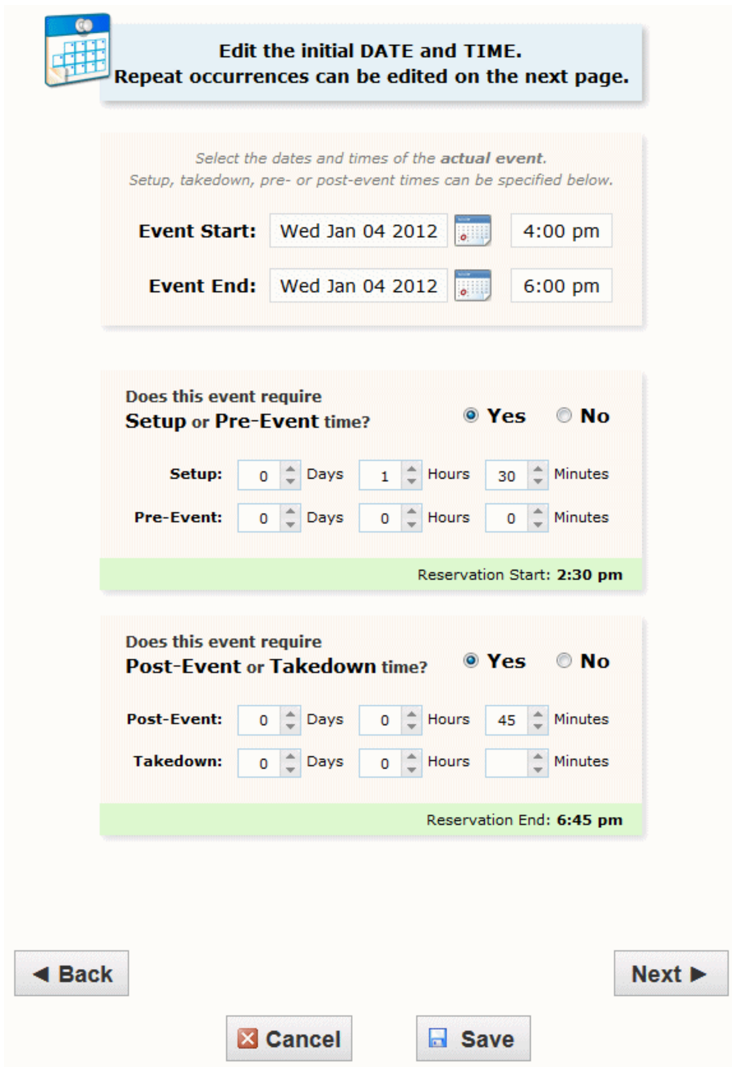


Click "Next" to set the event start/end date and time.

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.

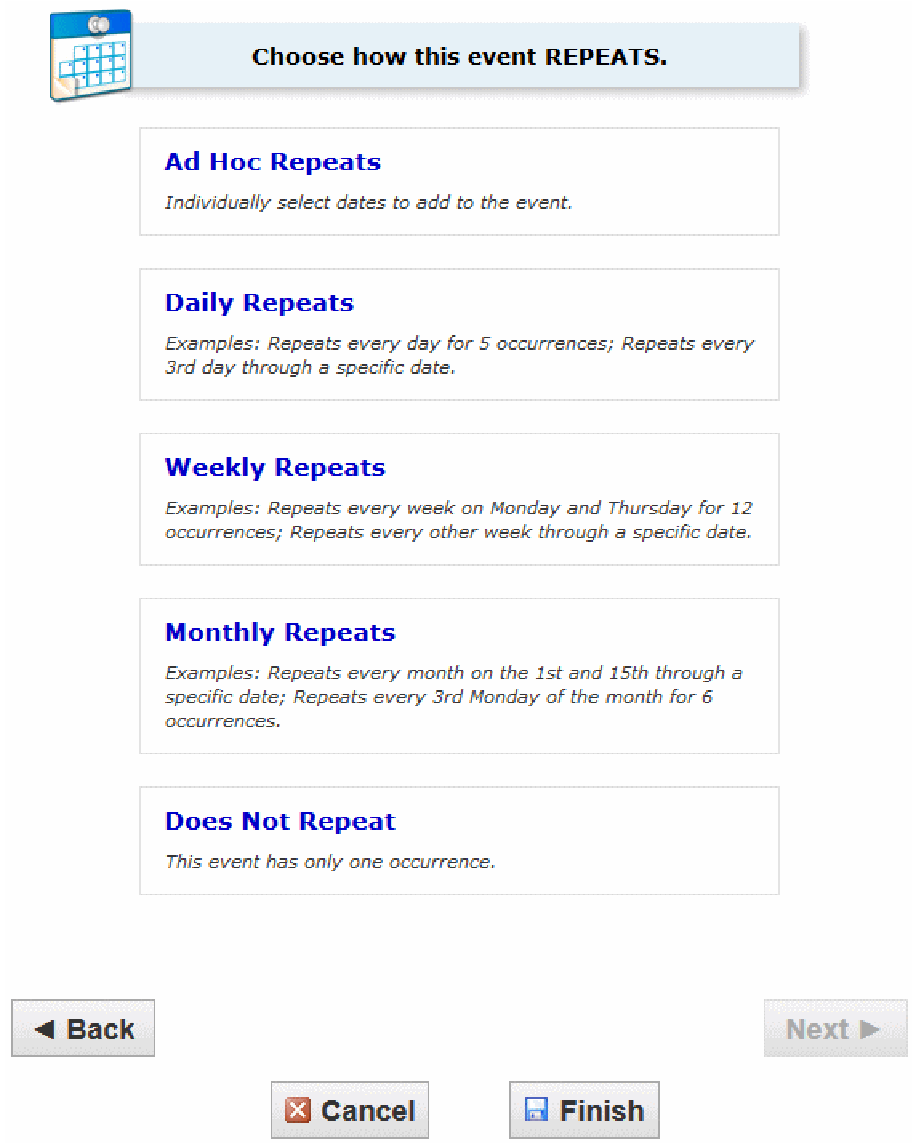
If the event requires Setup/Pre-Event and/or Post-Event/Takedown time, select the option you need, then set the number of days, hours, or minutes needed.



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?

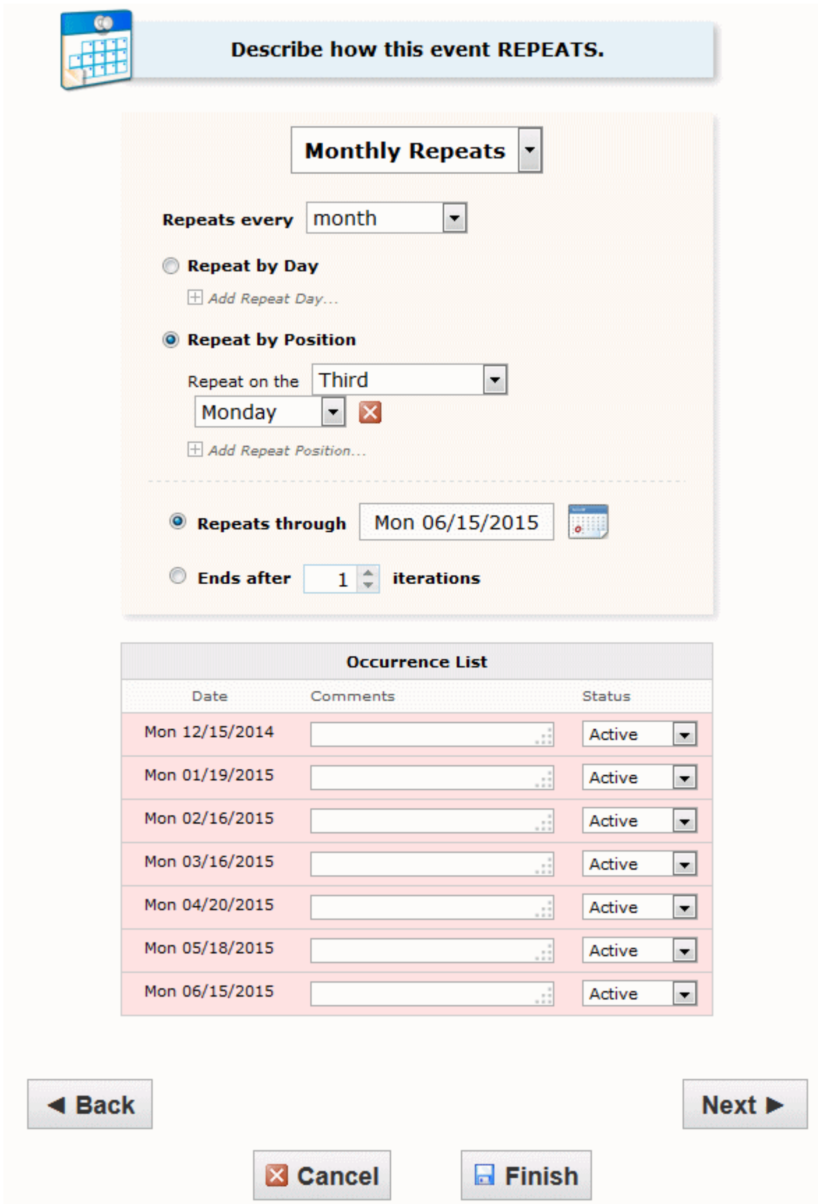
If your event has more than one occurrence, select how the event repeats.



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.



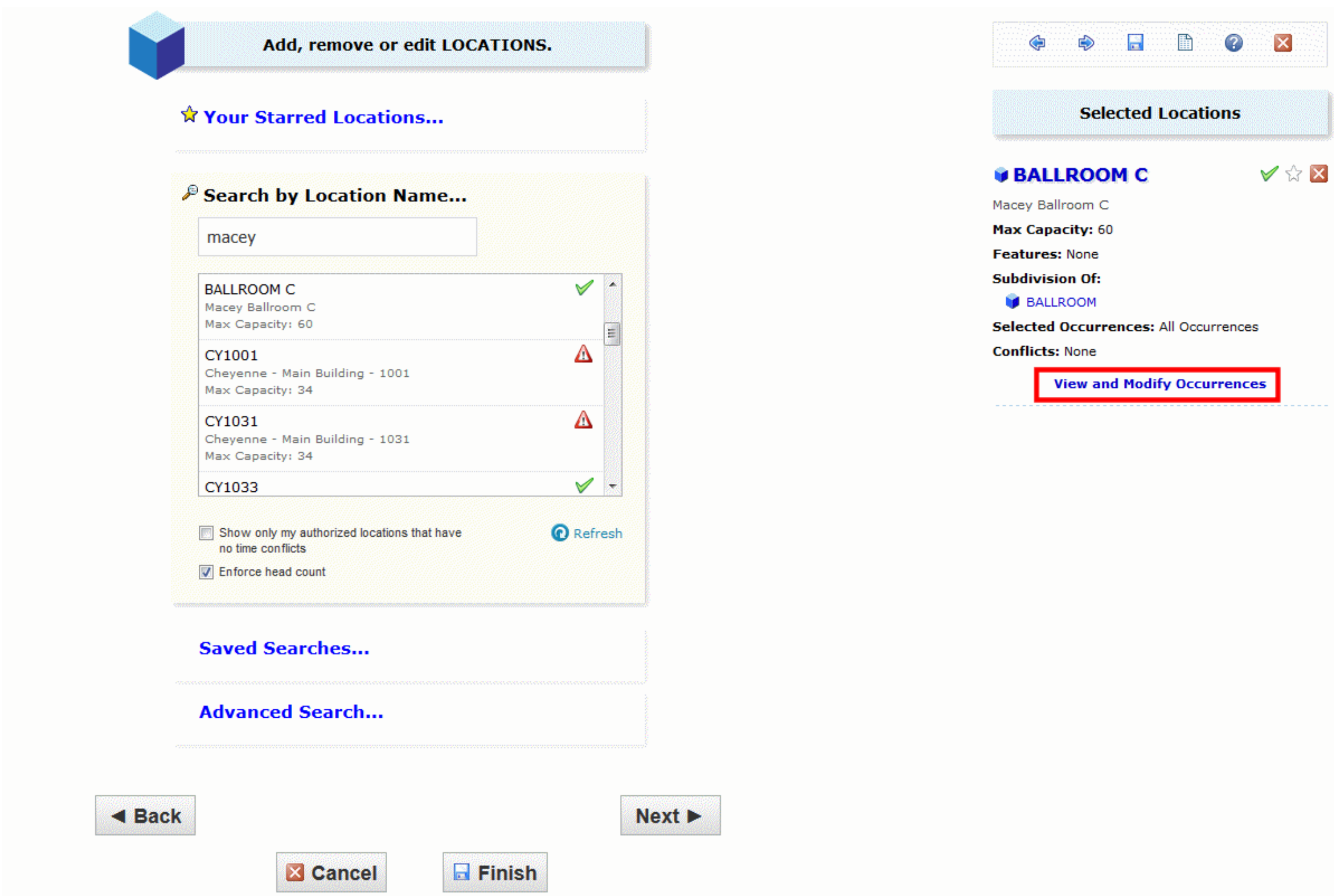
Click "Next" to select the event's location(s).

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).



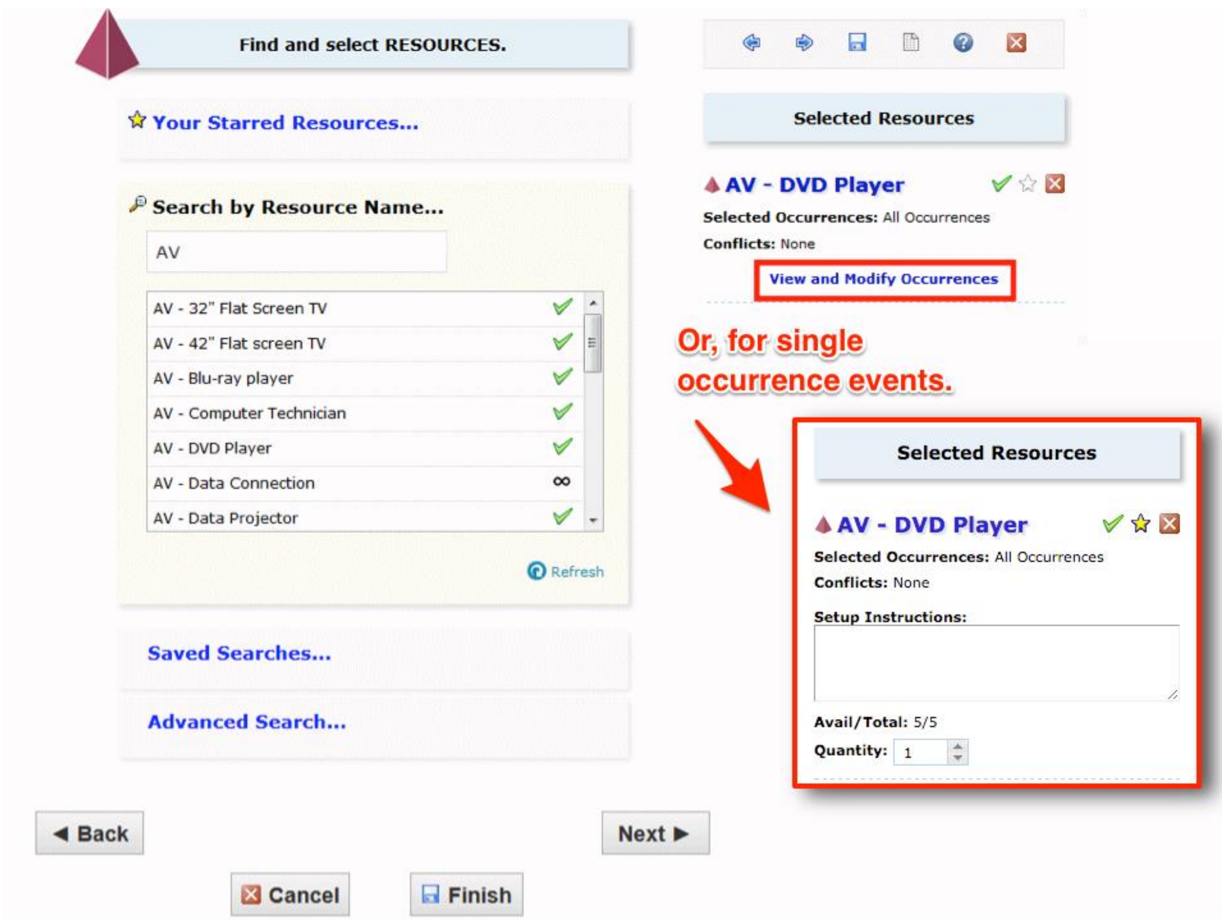
Click "Next" to select the event's resource(s).

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.

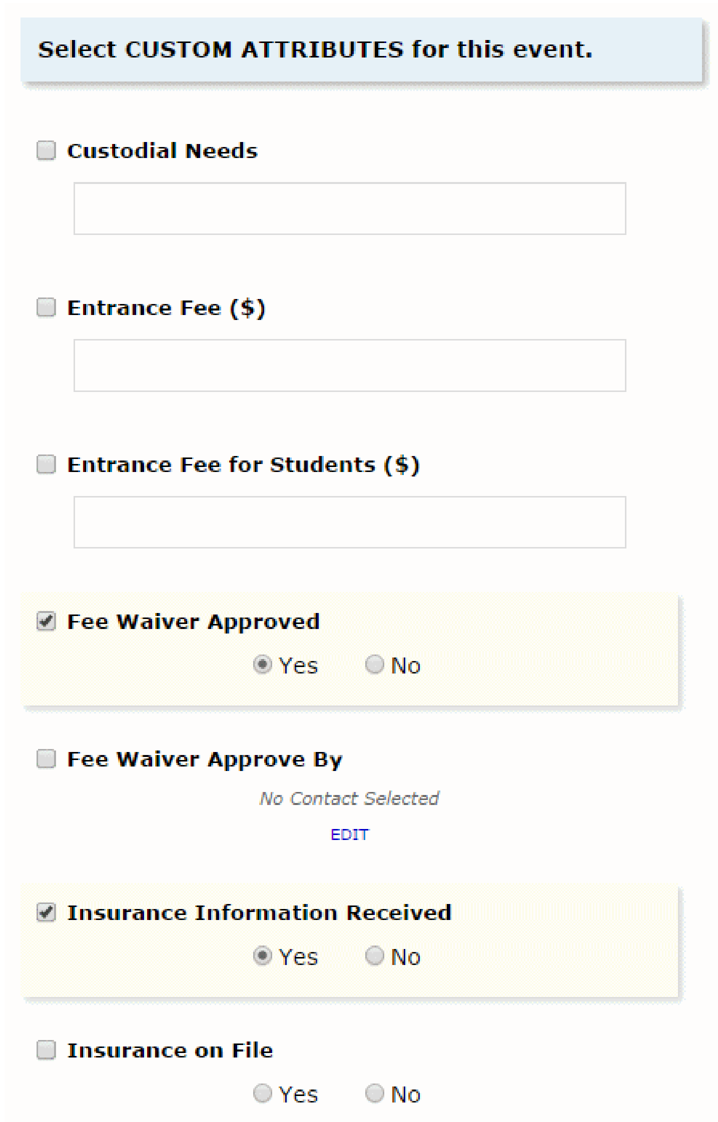
If you need to adjust the quantity of a resource needed for specific occurrences, un-assign a resource for specific occurrences, or add setup instructions, click "View and Modify Occurrences" on the right and perform the required task(s).



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.

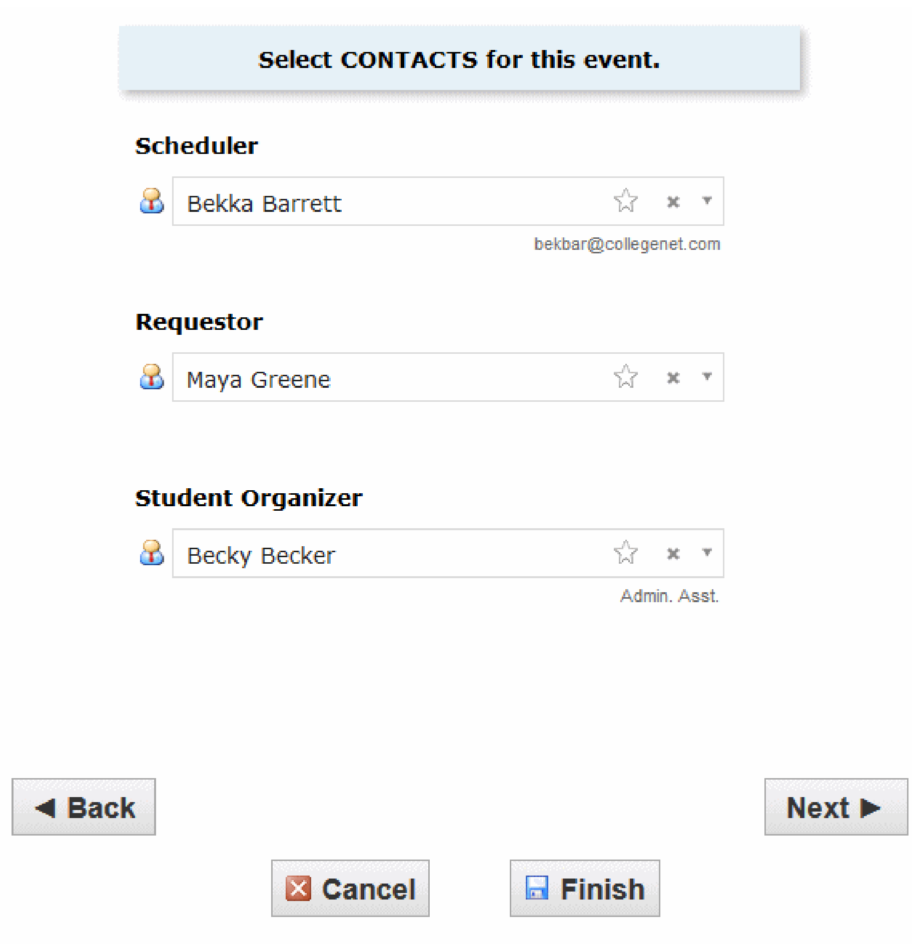


Click "Next" to select the event's contacts.

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.

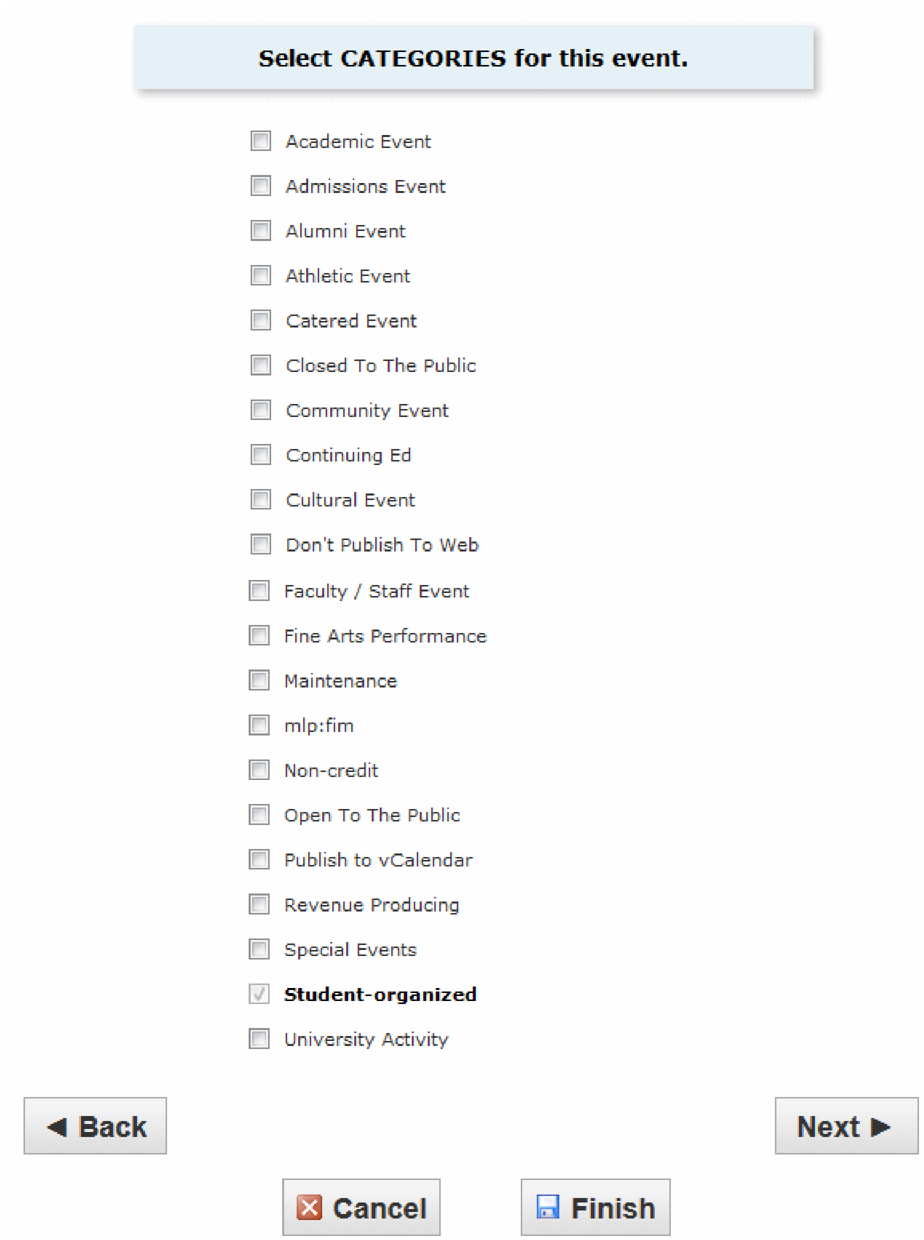
The scheduler may be automatically assigned to your event depending on security; this might be the Location Scheduler for your selected location or the default scheduler for your security group.



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.

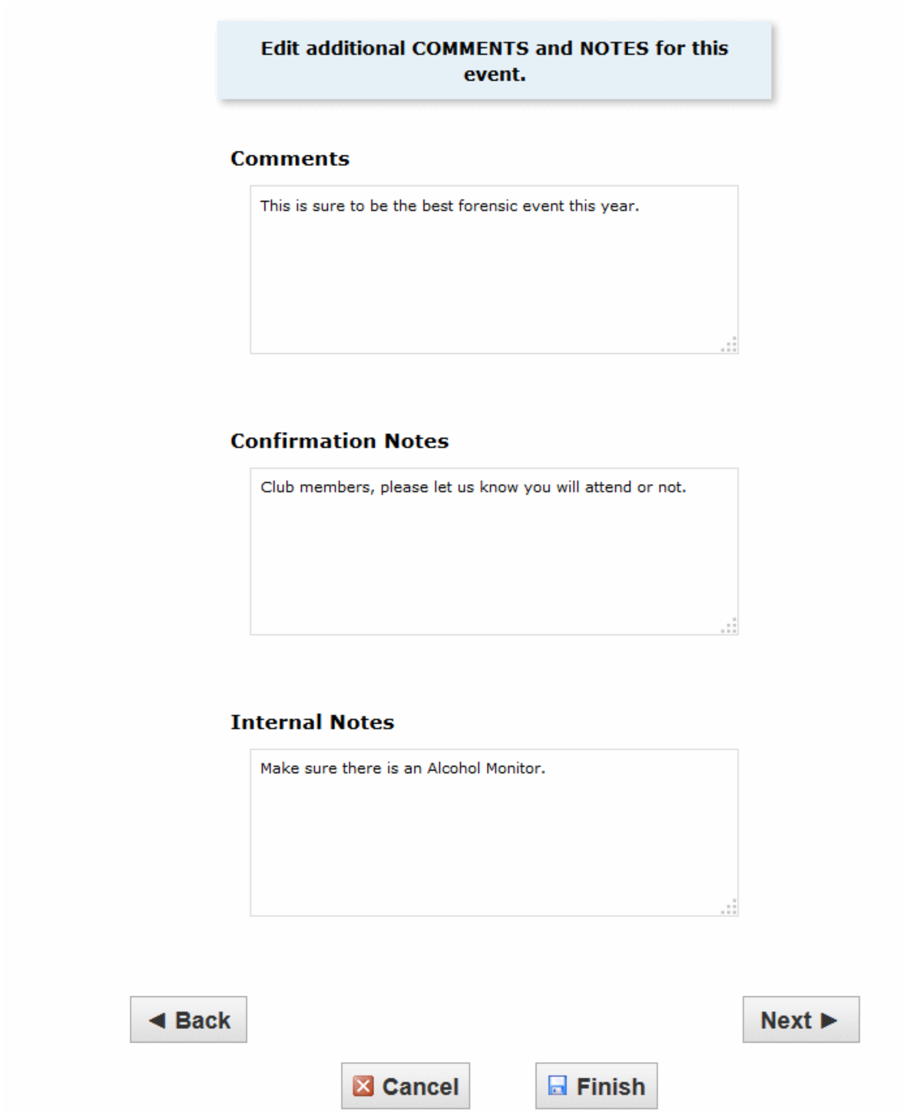


Click “Next” to select the event’s requirements.

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.



Click “Next” to agree to event terms and conditions.

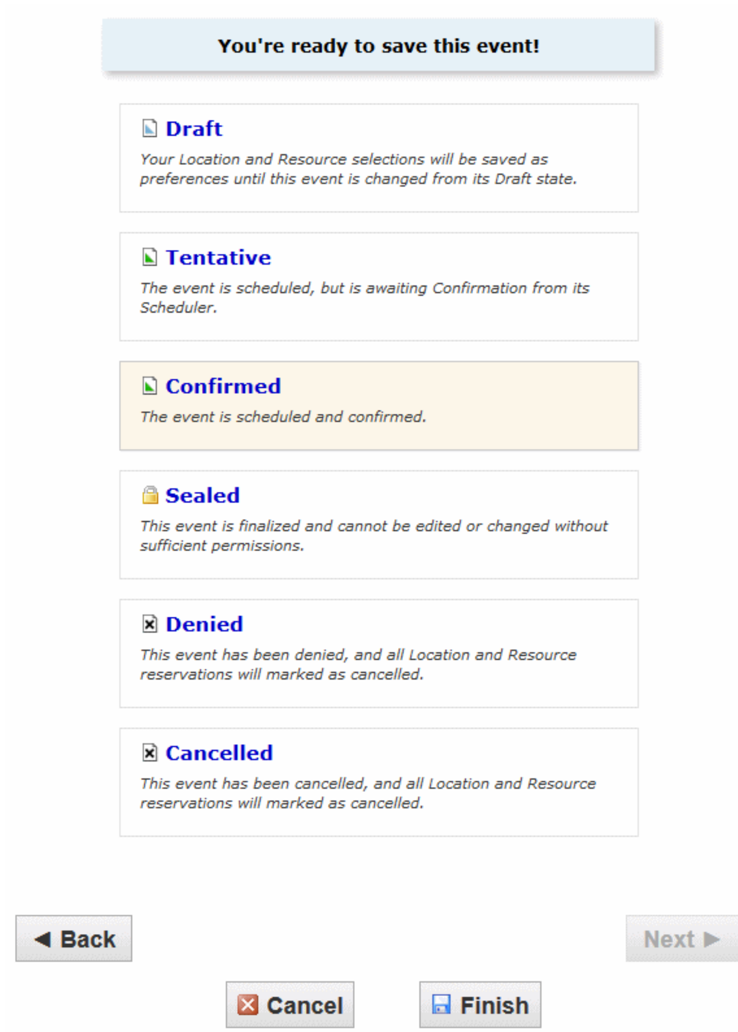
Choose event state

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.



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.