



CREATING EVENTS WITH THE EVENT FORM

Accessing the Online Event Form

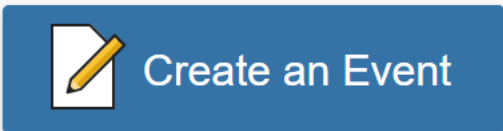
Take one of the following actions to start creating an event:

- 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

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

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.

2. Enter Attendance Information and Description

- Expected Head Count
- Event Description
- The Event Description can appear on web calendars if you intend to publish your event.

3. Enter Date/Time 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.

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 and complete its options, then use the **Select Pattern** button to save your choices.

Using the **Manage Occurrences** button, you can see a list of event occurrences with options to:

- Include Only Missing Locations View only occurrences that don't have locations requested or reserved
- Include Only Missing Resources View only occurrences that don't have resources requested or reserved
- View Included-View only occurrences that are marked to include in location and resource searches
 - By unchecking the Include In Search checkboxes in the list of occurrences, you can remove an occurrence from your location search to help find locations without conflicts for that date and time
- View All to return to the default view that shows all event occurrences
- Add Occurrence

This view also gives you options for:

- Adjusting occurrence Times
- Adding a Comment to each occurrence
- Changing the State to Active or Cancelled
- Removing individual Locations and Resources from an occurrence
- Using the Remove button for occurrences

5. Choose Locations

You can choose whether to Auto-Load Starred searches or not. It's often easier to start with a Saved Search, or you can perform a search for suitable locations by location name.

- If performing a keyword search, use the Search Filters dropdown to add additional search parameters, such as Categories, Features, Layouts, and Capacity
- Check the Hide Locations with Conflicts or Enforce Headcountboxes to narrow the results
 - These options are checked by default and will remember your setting to check or uncheck them
- To use SeriesQL for an advanced search, start typing two colons ::
- Buildings are available to filter when looking for locations

As you search, 25Live checks for the availability of location(s) at your specified dates/times.

If a location is available to Reserve, a green button is displayed. For locations that need extra approvals or permissions (such as ones that can only be requested or have conflicts), an olive-

colored button displays. 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, the reserved/requested item appears below the search (which you can collapse). For events with a single occurrence, location details can be edited directly on the tile. For events with multiple occurrences, use the View Occurrences link to add instructions, specify layouts, and additional options.

If you would like to set different locations for different dates, you can select only the occurrences you want to include for each location. For example, if the event repeats every Tuesday, Wednesday, and Thursday and you want to set a specific location for the Tuesday/Thursday occurrences, check only those dates, then use the Search button to reserve for just the selected dates.

6. Select Resource(s)

You can choose whether to Auto-Load Starred searches or not. It's often easier to start with a Saved Search, or you can perform a search for suitable resources by name.

- If performing a keyword search, use the Search Filters 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
- The search may not be available if your administrator(s) have limited the resource choices based on the selected location(s) or other criteria
- Columns are also displayed for Stock Total and Availability
- The links on resource names allow you to view resource details
- If there is a resource that your user has "Not Requestable" permission on, and your event form configuration has the resources card hidden, then you may see an alert when saving.

Resources ⓘ

Resources Search ^

Auto-Load Starred: No Yes

Test Resource Search ☆ ×

Reset Search

Add		Name	Quantity Available	Conflict Details
<input type="text" value="1"/>	Reserve	AV - Blu-ray Player	4 / 4	None
<input type="text" value="1"/>	Reserve	AV - Data Projector	10 / 10	None
<input type="text" value="1"/>	Reserve	AV - DVD Player	7 / 7	None
<input type="text" value="1"/>	Reserve	AV - Extension Cord	60 / 60	None
<input type="text" value="1"/>	Reserve	AV - Laptop - Mac	17 / 17	None
<input type="text" value="1"/>	Reserve	AV - Laptop - PC	17 / 17	None

Image: Extra information about resources is shown in columns.

Use the green Reserve button (or olive-colored button for resources that need other approvals or permission) to make selections. You may choose one or more available resources for your event.

Resource Occurrence Editing

25Live allows you to adjust settings per occurrence for each requested or reserved resource. After adding a resource, the reserved/requested item appears below the search (which you can collapse). For events with a single occurrence, resource details can be edited directly on the tile. For events with multiple occurrences, 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.

If you would like to set different resources for different dates, you can select only the occurrences you want to include for each resource. For example, if the event repeats every Tuesday, Wednesday, and Thursday and you want to set a specific resource for the Tuesday/Thursday occurrences, check only those dates, then use the Search button to reserve for just the selected dates.

7. Attach File(s)

To attach a file attachments for events, use the Choose File button to optionally attach one or more files.

- You can attach up to 5 files
- Files may not exceed 25MB
- Allowed file types: PDF, TXT, RTF JPG, JPEG, PNG, GIF DOC, DOCX XSL, XSLX, CSV MSG PPT, PPTX

You may also use this section to remove previously attached files from the event.

8. Further Event Information

Use this field to provide additional instructions or other relevant information regarding the event to Event, Location or Resource approvers, including:

- purpose of meeting / event,
- details and description of activities taking place during the event,
- particular seating arrangement needs,
- any equipment needs, such as access to AV equipment (e.g., projector, computer and/or screen),
- specific building and room preferences,
- and any additional information that might be helpful in scheduling your event.

9. Terms and Conditions

Confirm that you have read and agree to abide by the terms outlined for the space which you are requesting.

10. Save