25Live Pro

and the
NEW

Event Form

25Live Pro

A FEW IMPORTANT NOTES BEFORE STARTING

Note the absence of tabs just below the title bar.

SMITH COLL[•25Live Pro   Event Wizard   Student Worker Events Management Office   ≡ More

Try New Event Form! (reloads app)   🔍 Go to Search   Recently Viewed ▾   ? Help

🔍 Quick Search ^

📄 Search Events 🔍

🧊 Search Locations 🔍

🔻 Search Resources 🔍

🔗 Search Organizations 🔍

🔍 Your Starred Event Searches ^

📄 1All Drafts ⭐

📄 1ALL Non-Course 7.1.14-6.30.19 ⭐

📄 Your Upcoming Events ^

📄 5 Events in which you are the **Requestor**

📄 210 Events in which you are the **Scheduler**

📄 Your Event Drafts ^

📄 4 Event Drafts in which you are the **Scheduler**

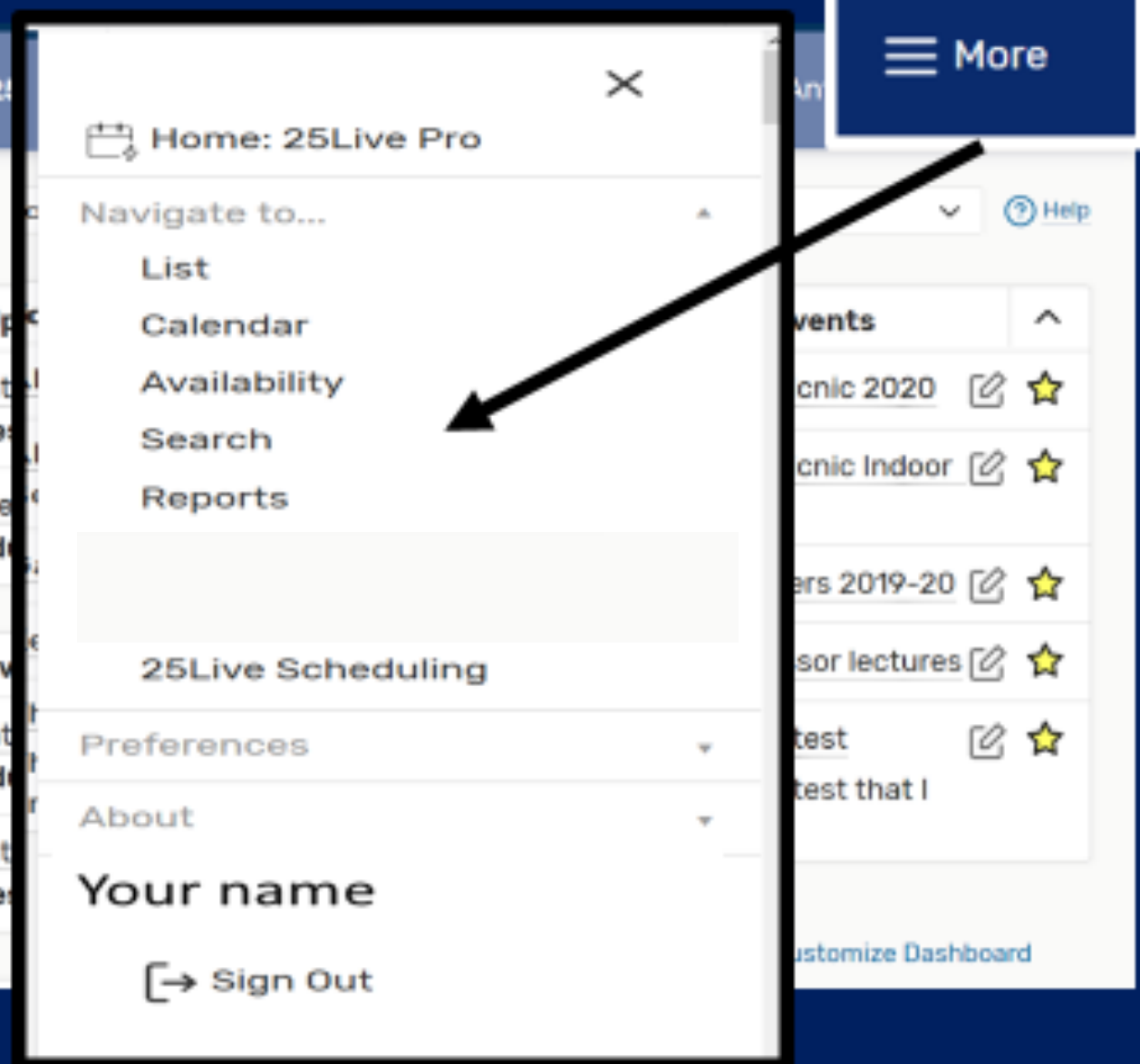📄 2 Event Drafts in which you are the **Requestor**

📄 Your Starred Events ^

📄 All-Employee Picnic 2020 ✏️ ⭐

📄 All-Employee Picnic Indoor Seating-2020 ✏️ ⭐

📄 Gallery of Readers 2019-20 ✏️ ⭐

📄 Kennedy Professor lectures ✏️ ⭐

📄 This is a test in test ✏️ ⭐
This is a test in test that I am testing

⚙️ Customize Dashboard

More

Instead, by clicking 'More' in the upper-right corner of the title bar, you can navigate to the functions you may want to use that you would have accessed using tabs.

Home: 25Live Pro

Navigate to...

List

Calendar

Availability

Search

Reports

25Live Scheduling

Preferences

About

Your name

Sign Out

The two simplest ways to access your events—from the 'Your Upcoming Events' and 'Your Starred Events' boxes—are still available where they've always been.

Right-click to Get More Navigation Options

Right-click on an event name in the "**Your Starred Events**" to get a "Choose a View" pop-up box that lets you navigate to information about that event.
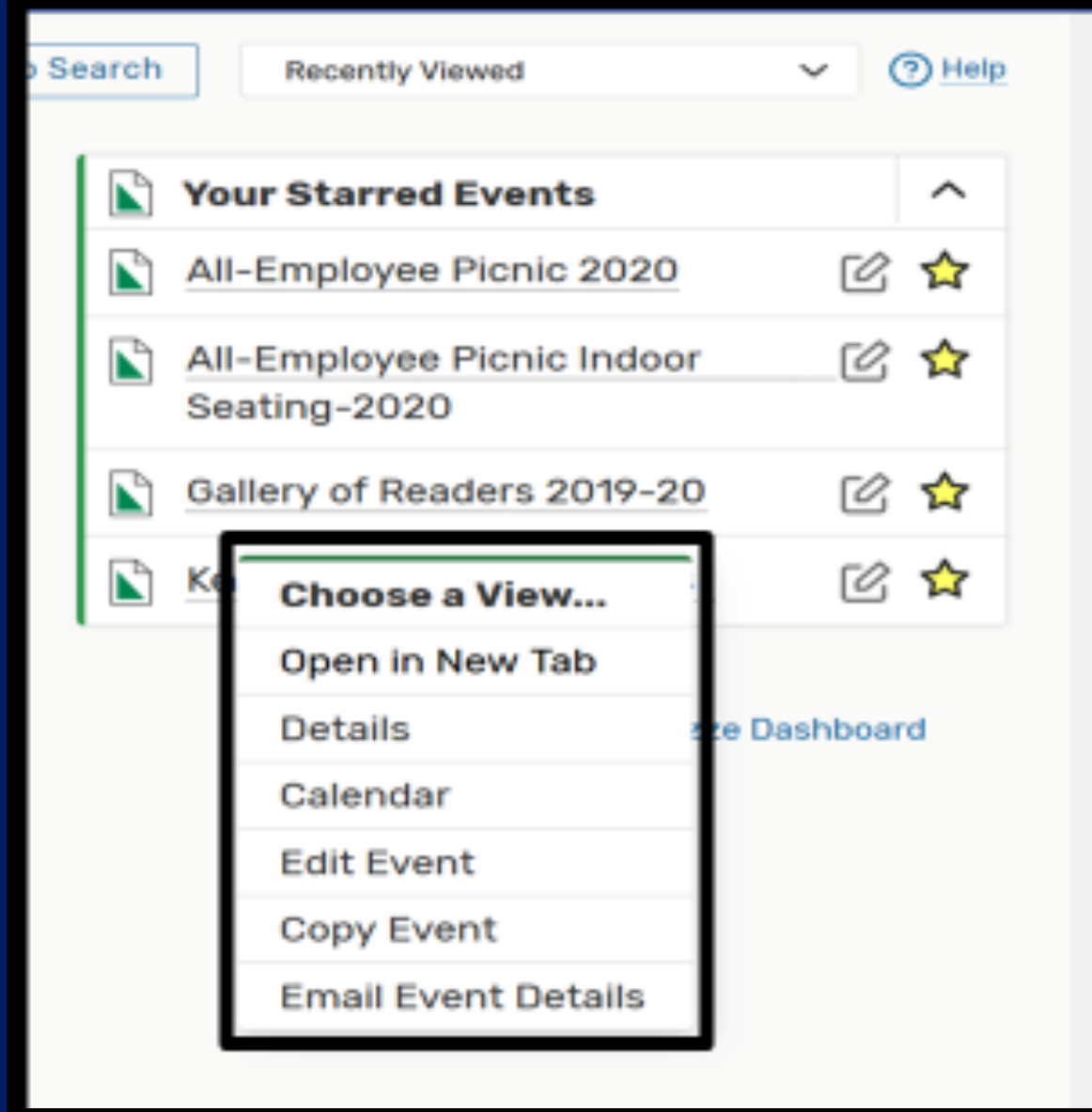
Select:

Details to view the event's date, location, resources, etc.;

Calendar to see the event date/s in a calendar;

Edit Event to drill down into (open) the event to make changes (such as add resources);

Copy Event to make a new request, for example, for an event that repeats annually;

Or **Email Event Details** to email someone about the event, such as the scheduler, when you need to change the time or add a date

Search | Recently Viewed ⌄ | ? Help

Your Starred Events ⌃

All-Employee Picnic 2020

All-Employee Picnic Indoor Seating-2020

Gallery of Readers 2019-20

Ke...

Choose a View...
Open in New Tab
Details
Calendar
Edit Event
Copy Event
Email Event Details

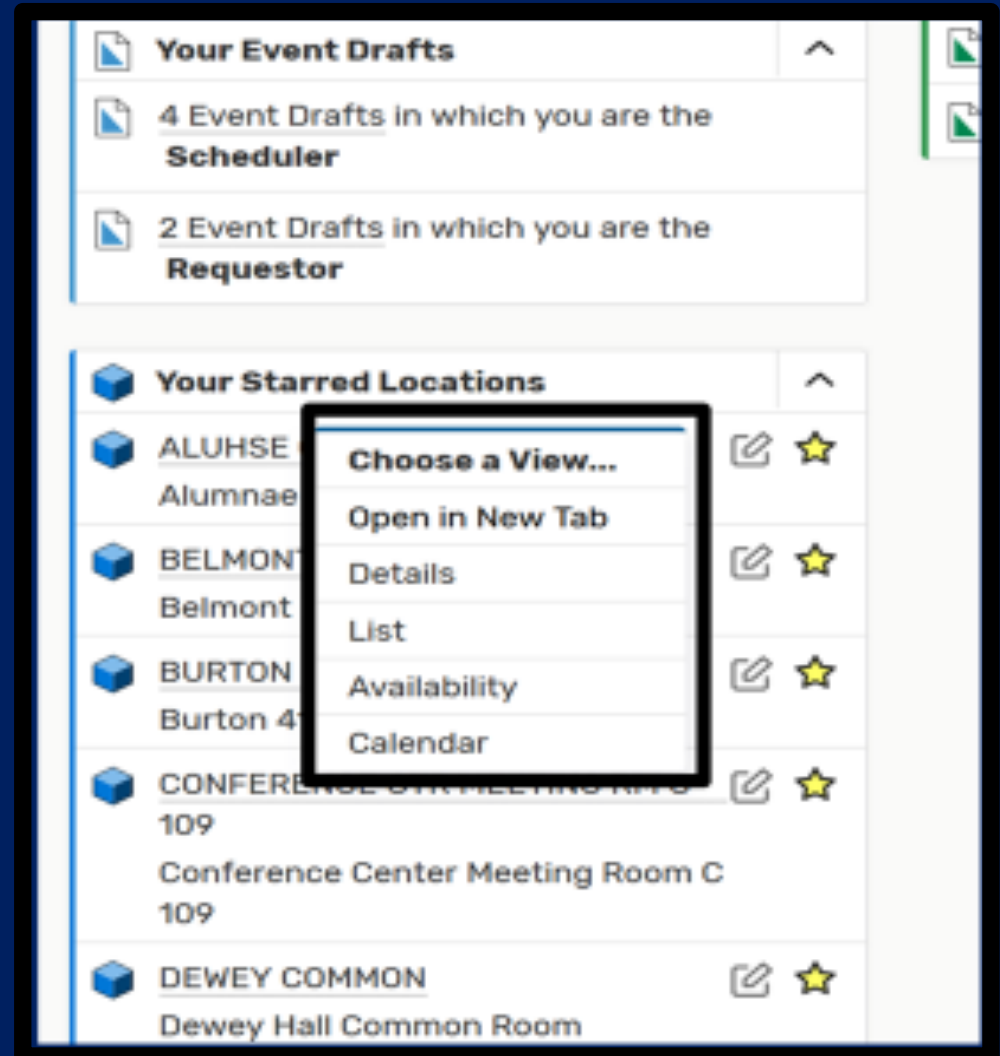ze Dashboard

Right-click to Get More Navigation Options

And if you right-click on an object on the Home screen—a location, for example, the "Choose a View" pop-up lets you navigate to information about that space:

Details for that space's details;
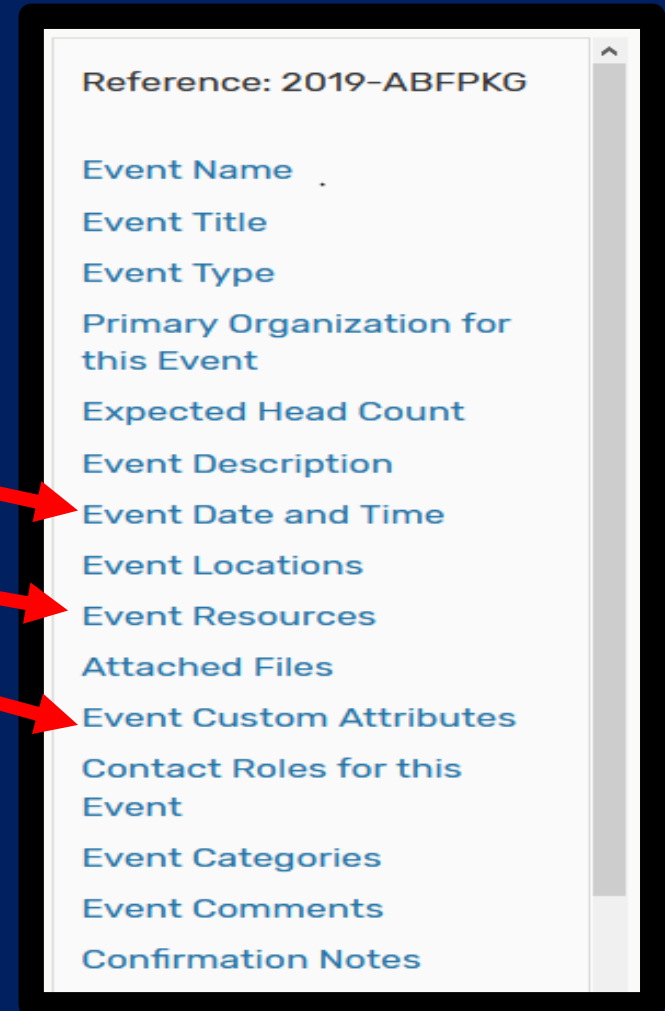
List to see it in a list;

Availability to see when it is available;

Or **Calendar** to see events in that space in a calendar format.
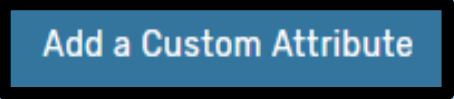
THE NEW EVENT FORM

The new Event Form features convenient side navigation to the left of the form's sections and fields. This makes it much easier to move through the form. **Click on any of the sections** on the **left side navigation box** to move to another section of the Form. This is much quicker than scrolling! <u>**There are no 'forward' or 'back' arrows because the entire form is on one page**</u>.

Reference: 2019-ABFPKG

Event Name

Event Title

Event Type

Primary Organization for this Event

Expected Head Count

Event Description

Event Date and Time

Event Locations

Event Resources

Attached Files

Event Custom Attributes

Contact Roles for this Event

Event Categories

Event Comments

Confirmation Notes

THE NEW EVENT FORM

- The Event Form contains all of the same fields you have been filling out in the Wizard. However, some of these are now "nested" and require that you click on either a drop-down arrow (to select locations and resources) or a button to open. For example, if you are used to indicating the custom attribute asking whether food will be served, be sure to click **Add a Custom Attribute** in this section of the form (here is where that left-side navigation feature will come in handy). Please make it a habit to open this section. Information you indicate here is often useful to schedulers and service providers because it allows us to process your request accordingly.

- Click and open this information icon **ⓘ** to view instructions and/or additional help for any field that displays it.

🔍 Go to Search   Nothing recently viewed ⇕   ⑦ H

To submit a request, click: 📝 Event Form

Event Name - *Required*

Event Title

Event Type - *Required*

Select an item ⌄

Primary Organization for this Event - *Required*

Search organizations ⌄   Remove

Additional Organization(s) for this Event

EDIT

1. Enter basic event information

Enter an Event Name (required), Expanded Event Name (optional), select an Event Type (required), and the Department-Program-Office (required). All but the event type can be changed at any time after submitting.

PLEASE NOTE: You are submitting a request that will need to be approved/scheduled by a space scheduler or service provider (if you are requesting services). Your event is NOT confirmed until you receive a confirmation from the space scheduler.

Event Name - *Required* ⓘ

Expanded Event Name ⓘ

Event Type - *Required* ⓘ

Select an item ⌄

Department-Program-Office

Search organizations ⌄   Re

Department-Program-Office - *Required* ⓘ

Search organizations ⌄   Remove

🔍 events ma|

Events Management Office ⭐

Expected Head Count ⓘ

2.

- Expected Head Count: Enter your best estimate for attendance.

- Event Description for Publicity

The Event Description you put here will appear on Smith online events calendars and in off-campus media outlets if the event is open to the public.

Expected Head Count ⓘ

Event Description for Publicity ⓘ

File ▾   Insert ▾   View ▾   Format ▾   Tools ▾

↶   ↷   **B**   *I*   U̲   A ▾   A̲ ▾   Font Family ▾   Font Sizes ▾   🔗

3. Enter date/time information about your event's <u>first</u> occurrence.

Specify the date of the **first occurrence** of the event. **If the event occurs on more than one day, you'll add those dates <u>in the next section</u>.**

Event Date and Time - *Required* ⓘ

Wed 09 Oct 2019

10:00 am

To:

11:00 am

☑ This event begins and ends on the same day

Additional time

« ‹ October 2019 › »

S	M	T	W	T	F	S
29	30	01	02	03	04	05
06	07	08	09	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02
					07	08	09

The box next to "This event begins and ends on the same day" should ALWAYS be checked. <u>Even if your event is a recurring event</u>, you should never indicate an end date here.
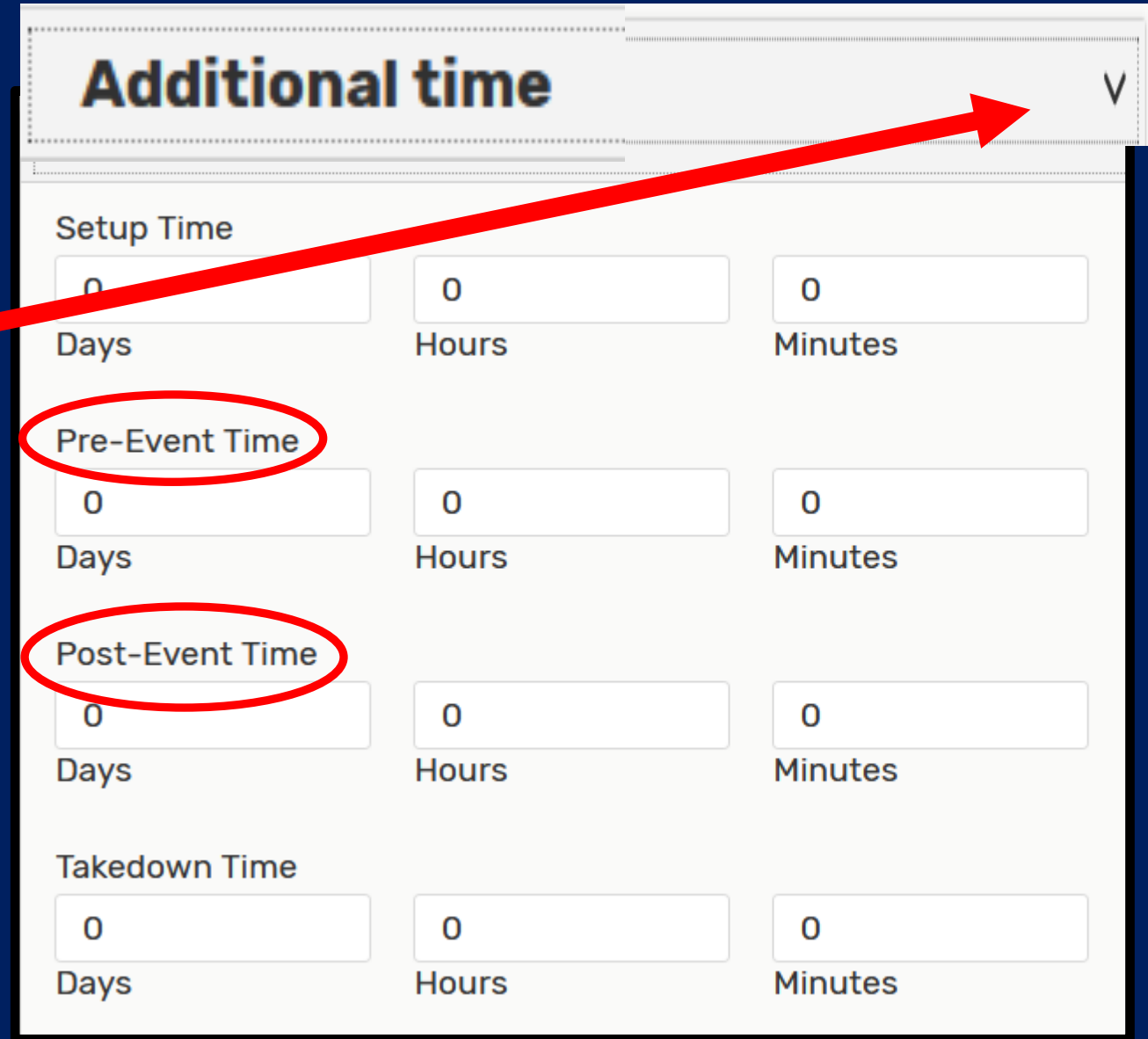
4. Additional Time

"Additional time" refers to time you want to be in the room before or after each occurrence of the event. Click the 'Additional Time' drop-down arrow to add *Pre-* or *Post-event time* to the event.
 To enter, click in the 'minutes' fields and type the time you need before or after the event begins/ends.

! **Do NOT indicate 'Setup' or 'Takedown' time.**

! "Additional" or "recurring" <u>dates</u> are added in the next step.

Additional time   V

Setup Time

0	0	0
Days	Hours	Minutes

Pre-Event Time

0	0	0
Days	Hours	Minutes

Post-Event Time

0	0	0
Days	Hours	Minutes

Takedown Time

0	0	0
Days	Hours	Minutes

5. Indicate the dates your event repeats.

If your **event has more than one occurrence**, select the additional dates by clicking dates on the calendar, using the forward arrow to move to a different month.

Click 'View All Occurrences' to see all the dates added...

Repeating Pattern

« ‹ October 2019 › »

S	M	T	W	T	F	S
29	30	01	02	03	04	05
06	07	08	**09**	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	01	02
03	04	05	06	07	08	09

View All Occurrences

ONLY use the 'Ad Hoc' repeat pattern to indicate your event's additional dates.

This is what the "**View all Occurrences**" (or "All Date Occurrences") box looks like
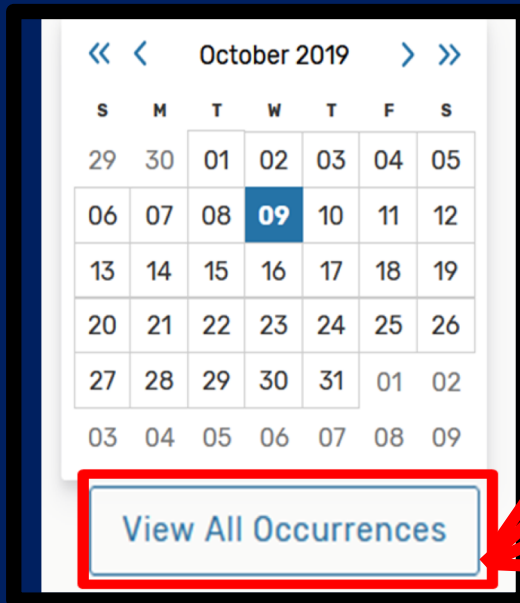
Click 'Remove' if you entered a wrong date; then go back to the calendar to add the correct date or other dates.

6. Selecting Which Space/s You Want to Reserve

Event Locations - *Required*

Locations Search

Resources

Resources Search

You can "expand" or "collapse" the Event Locations and Resources sections by clicking the arrow at the end of these fields. Expand to select your locations/resources; collapse when finished with these sections.

If you see this in the '**Event Locations**' section, click the 'Refresh' button!

Event Locations - *Required*

Locations Search ︿

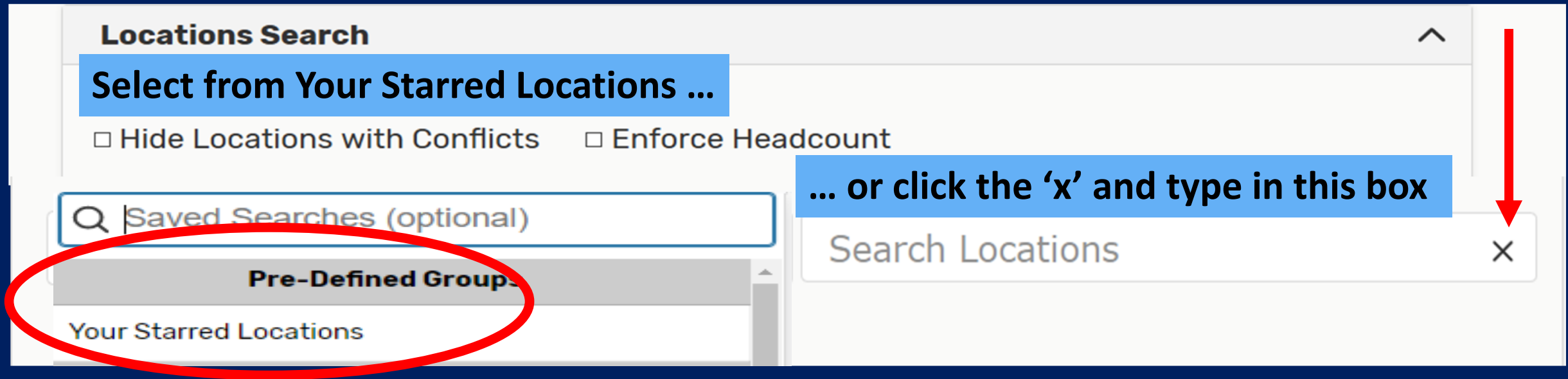Availability for this search is out of date. Click Refresh to update the results.

Refresh

Resources

Resources Search ︿

Availability for this search is out of date. Click Refresh to update the results.

Refresh

Locations Search

Select from Your Starred Locations …

☐ Hide Locations with Conflicts ☐ Enforce Headcount

… or click the 'x' and type in this box

Q Saved Searches (optional)

Search Locations ✕

Pre-Defined Groups

Your Starred Locations

6. Select Location(s)

Do __NOT__ check either the 'Hide Locations with Conflicts' or 'Enforce Headcount' boxes!

To find an available space, EITHER select 'Saved Searches' and choose from 'Your Starred Locations' OR <u>click the 'x'</u> in the 'Search Locations' to get a blank field, type the first three or four letters of a space name and in this field, and hit your keyboard 'Enter' key. This produces a list of spaces that match those letters.

6. Select Location(s)

cont.

If you see [REQUEST] to the left of a location name, the location is available! Click this box.

You may choose one or more available locations for your event. To choose another location, click 'Request' for another location on the list, or repeat the previous step. When you have 'starred locations' just click 'Request' from that list.

A selected location is saved in your request as a "preference" until the event is confirmed.

REQUEST	DUCKETT A	Duckett House Dining Room A	20	1/1	None
REQUEST	DUCKETT B	Duckett House Dining Room B	20	1/1	None
REQUEST	DUCKETT C	Duckett House Dining Room C	32	1/1	None

Locations Search

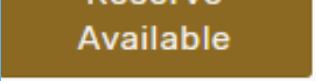☐ Hide Locations with Conflicts ☐ Enforce Headcount

Your Starred Locations ⌄ | Your Starred Locations ✕

Reset | **Search**

Add	Name	Title	Capacity	Availability	Conflict Details
Reserve Available	ALUHSE CONF HALL	Alumnae House Conference Hall	300	2/5	Conflict Details
Reserve	BURTON 411 MEETING ROOM	Burton 411	8	5/5	None
Reserve Available	CONFERENCE CTR MEETING RM C 109	Conference Center Meeting Room C 109	12	4/5	Conflict Details

5. **Select Location(s)** cont.

If you see [Reserve Available] to the left of the location name, this means location is available is available on *some of* the dates you've entered. If you need to use the same room on all dates, either select a location indicated as available, or repeat the process to find an available location for all dates, or select an available location from your starred locations.

Locations Search

☐ Hide Locations with Conflicts   ☐ Enforce Headcount

Your Starred Locations   Your Starred Locations

Reset   Search

Add	Name	Title	Capacity	Availability	Conflict Details
Reserve Available	ALUHSE CONF HALL	Alumnae House Conference Hall	300	2/5	Conflict Details
Reserve	BURTON 411 MEETING ROOM	Burton 411	8	5/5	None
Reserve Available	CONFERENCE CTR MEETING RM C 109	Conference Center Meeting Room C 109	12	4/5	Conflict Details

5. **Select Location(s)** cont.

Or, if you want to reserve the location when it <u>is</u> available, click "Conflict Details" to see when the conflicts are. Click [Reserve Available] to select the location, then choose dates it is available by going to the 'View Occurrences' box. Find another location available on the remaining dates.

Event Locations

SEELYE 101
⭐ Remove from favorites
Location Title: Seelye Hall 101
Capacity: 45

Remove | View Occurrences

SEELYE 107
⭐ Remove from favorites
Location Title: Seelye Hall 107
Capacity: 35

Remove | View Occurrences

SEELYE 201
⭐ Remove from favorites
Location Title: Seelye Hall 201
Capacity: 105

Remove | View Occurrences

5. **Select Location(s) - Location Occurrence Editing**

Click **View Occurrences** to check or uncheck dates.

This is the *Locations* **"View Occurrences"** box. There is a 'View Occurrences' button on every individual requested/reserved location and resource block.

DUCKETT A ✕

Date	Time	Conflicts	Included	Shared	Layout	Instructions	Attendance
Set For All			☐	☐	⇕		0
Tue 22 Oct 2019	6:00 am – 7:00 am		☑	☐	Capacity (20) ⇕		
Wed 23 Oct 2019	6:00 am – 7:00 am		☑	☐	Capacity (20) ⇕		
Thu 24 Oct 2019	6:00 am – 7:00 am		☑	☐	Capacity (20) ⇕		

Close

5. **Select Location(s) - Location Occurrence Editing**

Uncheck dates that either you do *not* want the space or that it's unavailable.

Locations Search ∧

☐ Hide Locations with Conflicts   ☐ Enforce Headcount

| Your Starred Locations ⌄ | Your Starred Locations ✕ |

Reset   **Search**

Add	Name	Title	Capacity	Availability	Conflict Details
Unavailable	DUCKETT A	Duckett House Dining Room A	20	0/5	Conflict Details
Unavailable	DUCKETT B	Duckett House Dining Room B	20	0/5	Conflict Details
Unavailable	DUCKETT C	Duckett House Dining Room C	32	0/5	Conflict Details

5. **Select Location(s)** cont.

If you see "Unavailable" to the left of the location name, it is not available for <u>any</u> of the dates you've chose. Repeat the steps to find an available location, or select an available location from your starred locations.

If this is what you see in the 'Resources' section, click the 'Refresh' button!

Event Locations - *Required*

Locations Search ^

Availability for this search is out of date. Click Refresh to update the results.

Refresh

Resources

Resources Search ^

Availability for this search is out of date. Click Refresh to update the results.

Refresh

6. Select Resource(s)

Requesting resources works similarly to locations. Either choose from the 'Your Starred Resources" Saved Search (click the "Saved Searches" drop-down arrow) or click the 'x' in the adjacent field and type the resource you need. **When the matching list is returned, take care to choose "Campus Center" (or 'Ctr') if your event is in the Campus Center.** Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available resources for your event.

Clicking 'Reserve' from the list here makes a list of your selected resources below.

1	Reserve	Chairs	9976 / 9976	None
1	Reserve	Chairs - Folding	10000 / 10000	None
1	Reserve	Chairs - Stackable	10000 / 10000	None
1	Reserve	Change Order	9999 / 9999	None
1	Reserve	Computer - PC Laptop	10000 / 10000	None
1	Reserve	Custodial Support/Setup Needed	9998 to 9999 / 9999	None
1	Reserve	Data Projector	9999 / 9999	None
1	Reserve	Dumpster	10000 / 10000	None
1	Reserve	DVD Player	9998 / 9998	None
1	Reserve	DVD/VCR/TV (Campus Center ONLY)	10000 / 10000	None

Chairs
Remove from favorites
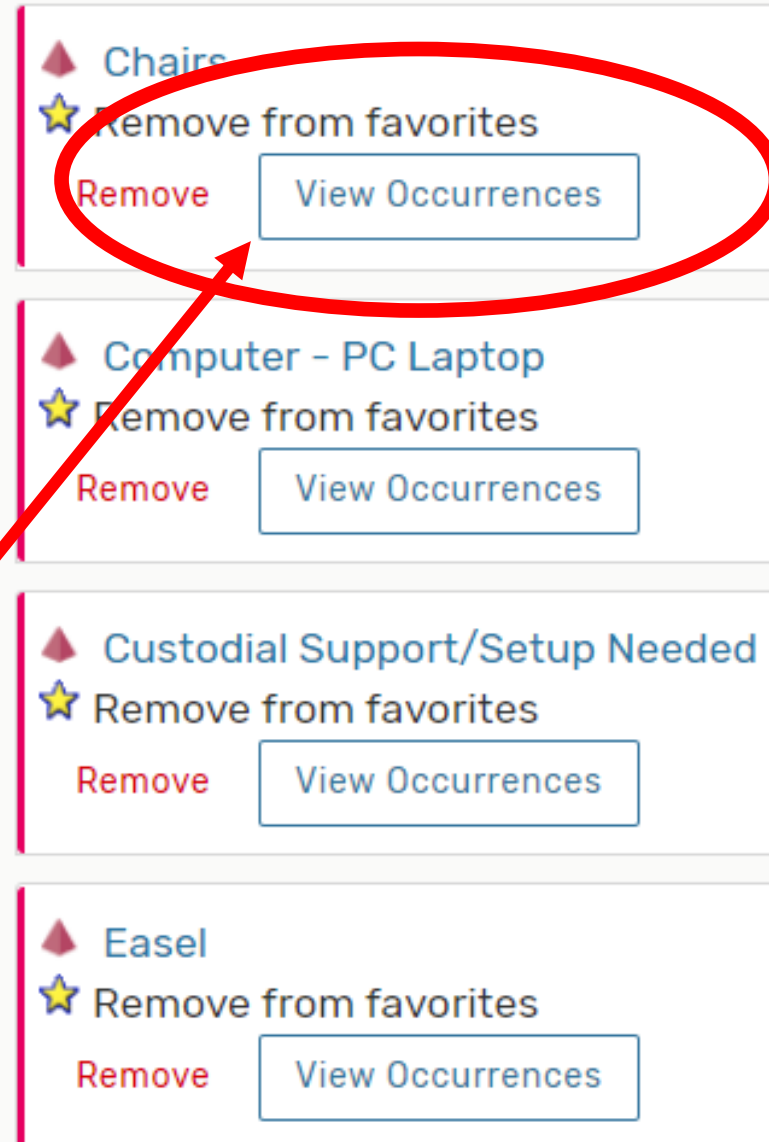Remove   View Occurrences

Computer - PC Laptop
Remove from favorites
Remove   View Occurrences

Custodial Support/Setup Needed
Remove from favorites
Remove   View Occurrences

Easel
Remove from favorites
Remove   View Occurrences

7. Resource Occurrence Editing

You can enter different quantities and instructions for each resource, and check dates needed (or uncheck dates not needed) for each resource.

Click the **View Occurrences** button ...

This is the *Resources* **"View Occurrences" box.** There is a 'View Occurrences' button on every <u>individual</u> requested/reserved location and resource block.

Chairs

Date	Time	Conflicts	Included	Instructions	Quantity	Available
Set For All			☐		0	
Tue 22 Oct 2019	6:00 am – 7:00 am		☑	Please set up five rows of five chairs	25	9976/99▢6
Wed 23 Oct 2019	6:00 am – 7:00 am		☑	Please set up chairs in three rows of ten	30	9976/9▢76
Thu 24 Oct 2019	6:00 am – 7:00 am		☑	Please set up chairs in a circle	10	▢976/9976

Close

Use the **View Occurrences** button <u>in each resource block</u> to select or deselect dates, add instructions, and adjust quantities.

At the end of the form, after clicking 'Save' ...

After Saving This Event...　　　　　　　　　　　　　　　　　∧

⦿ Go To Event Details

○ Create Another Related Event

○ Create A Related Copy of This Event

　　　　　　　　　　　　　　　　　　　　　　Cancel　｜　Preview

Save

... on the next screen, click the 'More Actions' drop-down arrow to get this list ...

Schedule　　　Task List　　　Pricing　　　Audit Trail

　　　　　　　　　　　　　　　🖉 Edit Event　　Confirmed ⇕　　More Actions ⌄　　↻　⑦

　　　　　　　　　　　　　　　　　　　　　　　☆　Add to Favorites

... and select 'Add to Favorites' to 'Star' the event!!

　　　　　　　　　　　　　　　　　　　　　　　📝　Edit Event

　　　　　　　　　　　　　　　　　　　　　　　🖺　Copy Event

　　　　　　　　　　　　　　　　　　　　　　　🖧　Manage Related Events

Reminders/Additional Tips

Remember that 'starring' your favorite events, locations, resources, organizations, and contacts gives you the quickest access to the objects you work with most often.

A filled star icon next to an item indicates the item is currently a favorite.

- Tap or click an empty star icon to **add** that object to your favorites.

- Tap or click a filled star icon to **remove** that object from your favorites.

Starred events, locations, resources, and organizations are all available in the default pre-defined group listed in the Saved Searches choices in the Search section.

You may also star event types as favorites. Contacts may be starred and unstarred, but only during event creation/editing.

Reminders/Additional Tips continued

1. Your 'Event Start' and 'Event End' dates are ALWAYS THE SAME.
   Even if your event is a recurring event.

2. 'Event Start' Time is the Time the Event Starts!

3. If your event has more than one date (or, recurs), ONLY use 'Ad Hoc Repeats' to indicate additional dates.

Reminders/Additional Tips continued

ALWAYS 'star' your events, locations and resources!

NEVER   NEVER   NEVER

submit a new request to change something on a reservation or a request already in place! This applies even when you've made an error on your request. The <u>only</u> time a separate or new request is needed is if dates in a recurring reservation meet at different times.

Should you submit a new request when you need to change something in a reservation or request already in place, or when you've made an error on your request?

NEVER submit a new request to change something on a reservation or request already in place! Even when you've made an error on your request.

The <u>only</u> time a separate or new request is needed is when a date (or dates) in a recurring reservation meets at a different time.

Reminders/Additional Tips

- **Never attempt to change the date, time or location(s) of your event/request once it has been submitted. This will un-reserve your reservation without anyone knowing this has happened (and it won't be corrected). In other words, you will not have a space reserved for your event. Only a space scheduler can make these changes. ALWAYS CONTACT THE SCHEDULER TO REQUEST A CHANGE TO THE DATE, TIME OR LOCATION.**

- **The event reference number is displayed when the event is saved. Always have this number handy when requesting any changes to a reservation.**

Final Notes

Questions/changes concerning your space reservation --

BEFORE it is confirmed: Kathy San Antonio

Once it has been confirmed: the space scheduler (save your confirmations!)

Questions about services for your event --

if your event is in the Campus Center:

Emma Roberts (interim), ext. 4988

if anywhere else:

- Steve Campbell for setup and non-technical equipment

- Moses Diaz for tech support