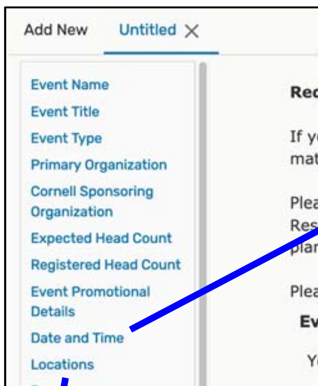
Create an Event Using the 25Live Event Form

There are several ways to create an event. On the dashboard note the **Create an Event** button. At the top of each page, **Event Form** will display any new and unsaved events. Let's create our first event using the availability grid using an open time period on the grid.

You can find an open time on the availability grid and click to start the process. This opens the event form and automatically assigns the location and start time. Note: sections of the event form are linked in the navigation area on the left side of the page. Use the event form to set all parameters associated with an event including name of the event, associated organizations, head count, dates and times, locations, etc.

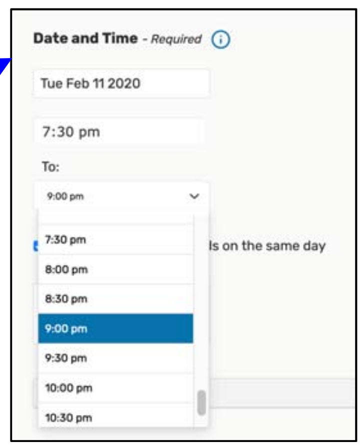
Event Form Navigation

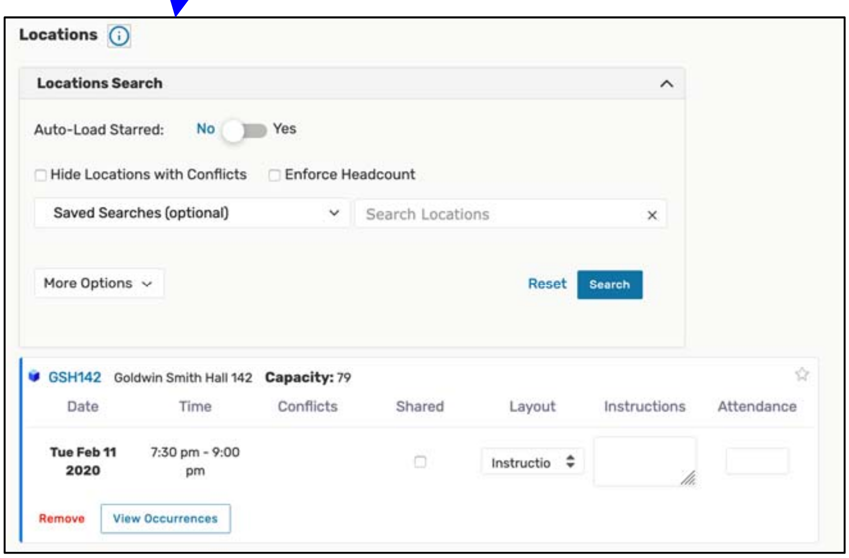
If you want to access a particular section of the event form, click the text link in the navigation box.



To verify the **Date and Time** or **Location** selected using the availability grid, click on the appropriate link.

Feel free to adjust the end time for this example.

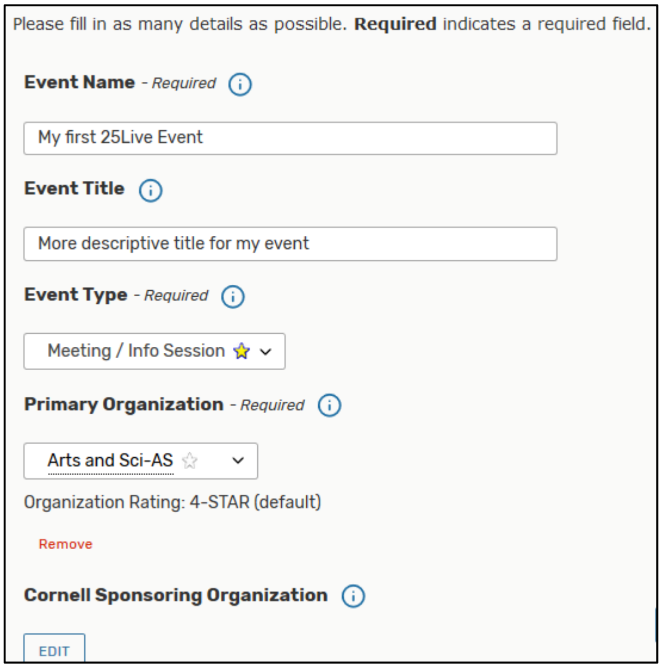




Many fields / areas on the Event Form have an "info message" where additional information is presented about this section of the Event Form. In production, these info messages are turned on by default for requestors; as a scheduler you can view the info message by clicking on the icon.

Scroll back to the top of the Event Form.

Event Name and Title & Event Type

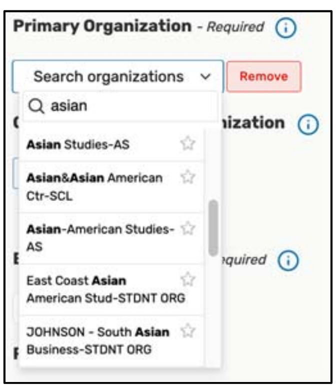


Event Name and **Title** are self-explanatory. The Title may be seen when the event is published, so good practice is to put something more descriptive in the longer Title field[2].

Event Type displays a drop-down list of available types. Select one that best describes the type of event this is. Use "Class Related" for events such as review sessions, make-up tests and the like. The "Umbrella Event" types will be described later in the training.

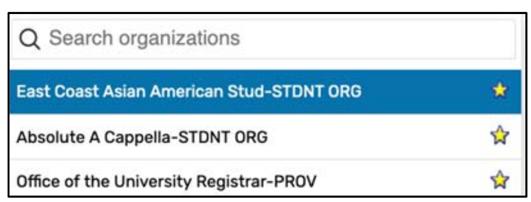
Organizations Relevant to the Event

The **Primary Organization** field is where you designate the organization that will be the main organization associated with the event. This may be an organization associated with Cornell or an External Organization. You can search from around 3000 Cornell organizations loaded into 25Live. Student organizations are pulled from Campus Groups; administrative orgs are from the KFS system; and we will be adding external organizations as they are identified in the event form or by sending a request to scheduling@cornell.edu.

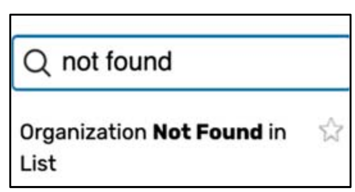


Search for organizations using keywords within their name. Each organization has a type appended to the name. (STDNT ORG, AS, SCL, EXT ORG, etc.).

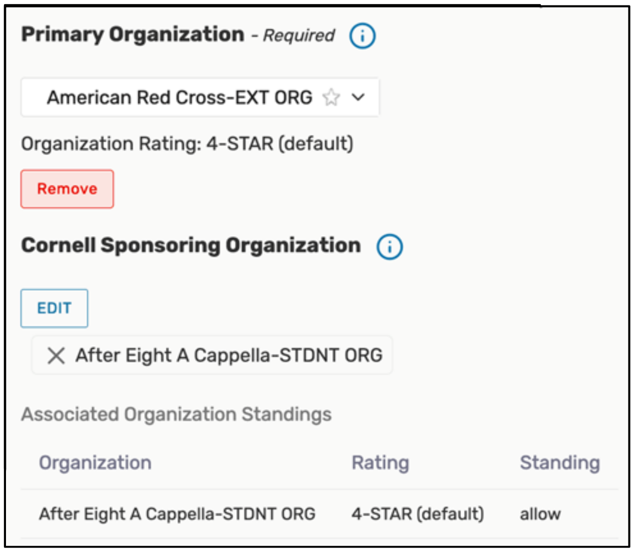
If this is a frequently used organization, you can click on the star and it will show at the top of your list in future.



If you do not find the organization in the list, enter **not found** in the search field and select **Organization Not Found in List**. You will need to add a description of the Organization not found in an attribute later in the Event Form. 25Live support staff will follow up.



2 There is no need to put information about the requestor in the Title as most requests will come directly from the requestor



The **Cornell Sponsoring Organization** field is used when an external organization is added as the primary organization.

Every event needs to have an associated Cornell organization - either as the primary organization ***or*** as the sponsoring organization when an external organization is entered as the primary.

External organizations were not added to 25Live at go-live, so part of the ongoing process will be to add these orgs as requested.

Head Counts

The Info Message associated with Head Counts states.

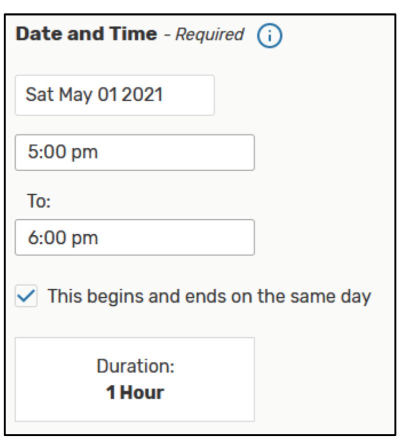
> For **In-person** and **Hybrid** events, enter your best estimate of how many people you truly expect to attend your event in-person; the value should be one or more. For **On-line Only** events, enter **0**.
>
> NOTE: This number is used to compare against the location's Max Occupancy (the number of people a location will hold). Location occupancy takes into account social distancing and other COVID safety requirements; in-person events are limited to ten and fewer occupants.

Your estimate is better than no value or zero; though events associated with activities such as Maintenance can be set to zero. Class enrollment is populated in registered headcount via the PeopleSoft-25Live interface.

Promotional Info

Event Promotional Details are used to publicize the event and allow HTML editing.

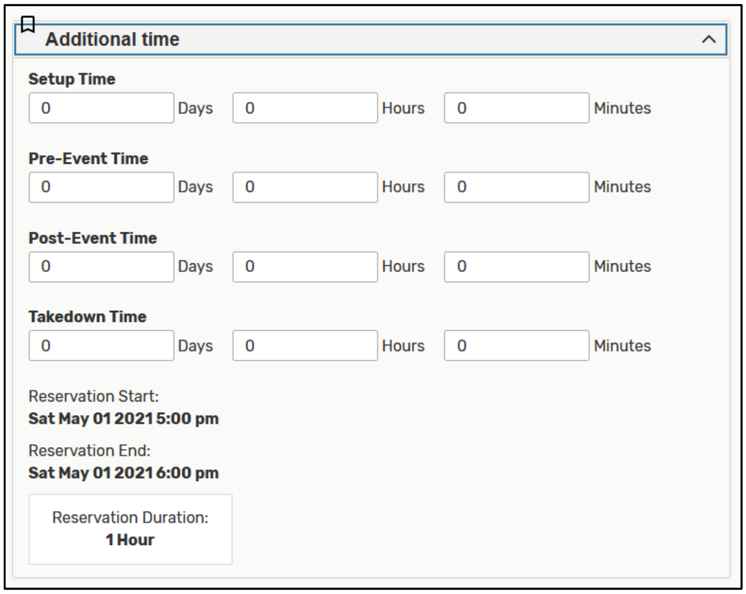
Date and Time



Most events have a single occurrence with a date, start time, and end time. By using the availability grid, the date and start time were set automatically as the first (and possibly only) occurrence.

For an event that spans the midnight hour, uncheck the box called "This event begins and ends on the same day." Example: Your event starts late in the evening on one day (e.g., 10:00 PM) but lasts until the early morning hours (e.g., 2:00 AM).

Many events repeat and / or need additional time set aside before and after the actual event.

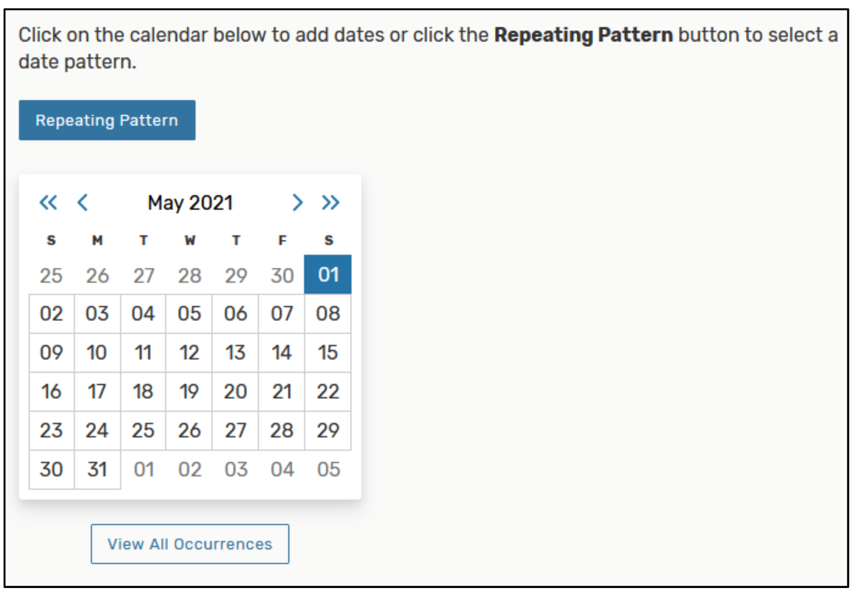


Clicking the **Additional time** down arrow reveals options to enter **Setup**, **Pre-Event**, **Post-Event**, and **Takedown** times.

These are entered as time allotments in minutes, hours or days and effect the overall time for the event.

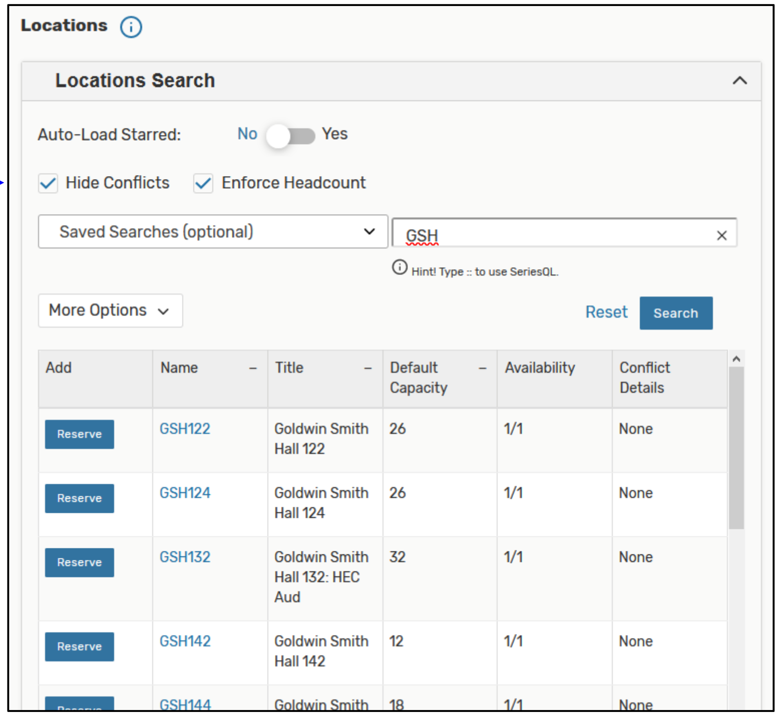
The availability grid will reflect any additional time associated with the event.

Most events, including this example, have only one occurrence. We will review how to set up a **Repeating Pattern** in a later module.



Locations

Creating the event from the availability grid pre-sets the location for an event. A non-class event can have multiple locations assigned for its date/time combinations.

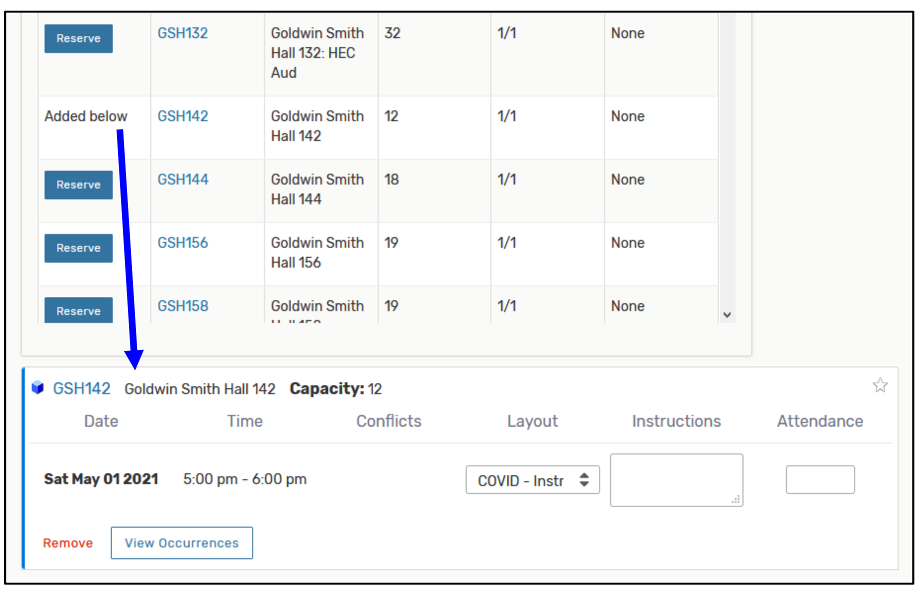


In the demo, a single location, GSH142, was assigned to the event. If we didn't start from the availability grid, we can search for available, right-sized (not too small) locations be sure to check the box next to **Hide Locations with Conflicts** and **Enforce Headcount**[3].

Here, the three-letter building designation was entered in the **Search Locations** field to produce a list of available locations.

If you have Assignment Rights for the listed locations, you will see a **Reserve** option; if not, you will see a **Request** option.

Once you have identified the location you wish to assign, click the Reserve button and it will be added below with the dates assigned.



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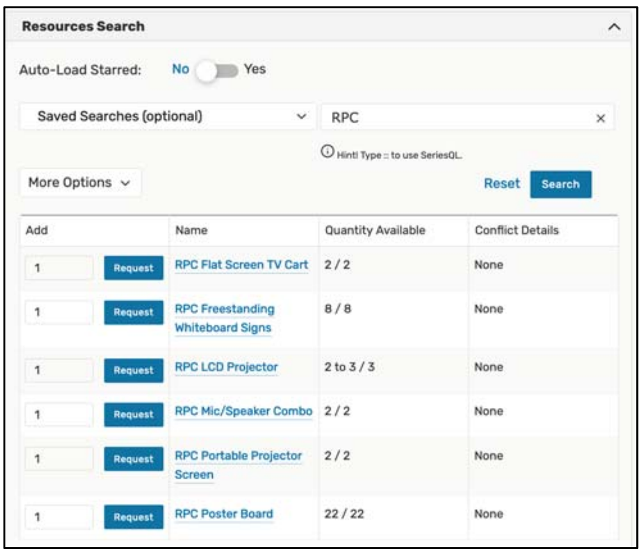
[3] Some location capacities have a capacity of zero such as display cases. Also, some location capacities are being updated and may be set to zero temporarily. If enforce headcount is on and you have an estimated headcount > 0, these locations will not be returned.

Resources

Similar to locations, 25Live resources can be scheduled for any event (or specified occurrences of the event). Broadly, there are two classifications of 25Live resources.

1. *Physical Resources* such as a portable projector, screen, audio equipment, etc. that is not attached to a location and can be checked out of inventory and assigned to an event. These resources have an area designation in their name (e.g., WSH LCD Projector) and are assigned by the area scheduler

2. *People Resources, e.g., University Event Team (UET) Resources* can be assigned to an event via the Event Registration Form (covered later) or by an Event Registration Approver, but typically not by a Scheduler. EMPT Resources are based on certain activities, for example if alcohol is served or a caterer will be serving food. Other people resources can be added as needed.



At present, most physical resources are associated with student areas such as Willard Straight Hall, Robert Purcell Community Center, and so on. *These Resources are managed by the particular area and are not available for general use.*

When scheduling an event in Robert Purcell that requires physical resources, enter RPC in the **Search Resources** field and assign the appropriate item. 25Live keeps track of the inventory so that no over allocation occurs.

File Attachments

Files such as layouts, or detailed event information to help schedule the event can be attached in the section titled "Upload Additional Information".

Custom Attributes - Event Activities and Features

Custom attributes have been added to 25Live to further define and clarify events. These questions are now in the Event Form section titled "Event Activities and Features". The requestor is required to respond to a set of questions that expand to additional questions as needed. Based on the responses to these items, resource tasks and notifications are created for the event.[4]

As part of Activity 3A, you will be asked to create a test event and expand these items to better understand the kinds of questions asked.

Event Contacts

A scheduler can change the requestor or scheduler for any event. The general requestor does not see this section. In production, the scheduler will default to the Location Scheduler, supplied by the departments, and may be a group email.

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[4] There is no longer any need to go to a separate application to complete the form. All questions are in the event form itself.

Descriptive Fields

The **Event In-Depth Details** field is the place for a requestor to add helpful information about what may be needed for the event. **Confirmation and Scheduler Notes** can be set by the scheduler. **Scheduler Notes** are not seen by the requestor but are viewable by schedulers and resource approvers.

Event State

When an event is being created, the two options are **Tentative** or **Confirmed**. Once saved the option **Cancelled** is added to the list for schedulers. For general requestors, the state is set to tentative and they cannot change its state to confirmed or cancelled. Once the location has been assigned, if this event requires no additional, the scheduler can change the status to **Confirmed**.

Attestation

General requestors are presented with a required affirmation statement.

I agree to be bound by the policies and procedures concerning the use of space and resources at Cornell University.

- Required

By clicking the "I agree" box, you are attesting that the sponsoring organization/department has completed this request form truthfully and to the best of their knowledge, assumes responsibility for obtaining all applicable Event Request approvals, following all building policies and procedures, and for damage to University property and clean-up.

The sponsoring organization/department agrees to comply with all federal, state, local and University laws and codes. If repairs or additional clean-up by University employees is necessary, the sponsoring organization/department will be billed. Independent organizations agree that they are bound by the terms and conditions of the "Independent Organizations Agreements."

The sponsoring organization/department attests that they have read and understood the University's Code of Conduct and Policy 4.8, Alcohol and Other Drugs. Click the "I agree" box below to attest that you have read and understood the statement above.

☐ I agree

After Saving …

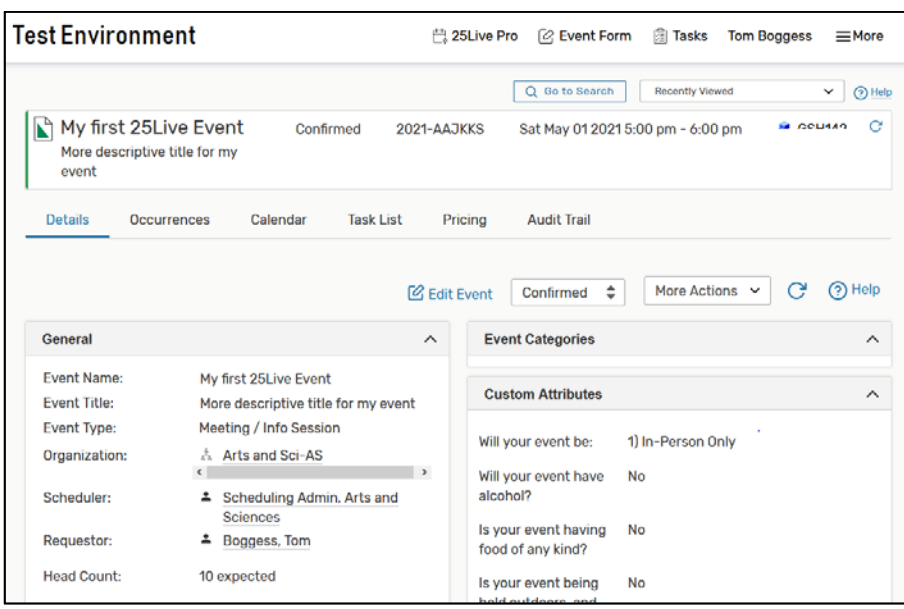
After Saving This Event...

- Go To Event Details
- Create Another Related Event
- Create A Related Copy of This Event

Once saved, 25Live will show details associated with this event or start the process of creating a new event by copying this event or creating a related event (more to come on these topics)

Event Details and Other Event Views

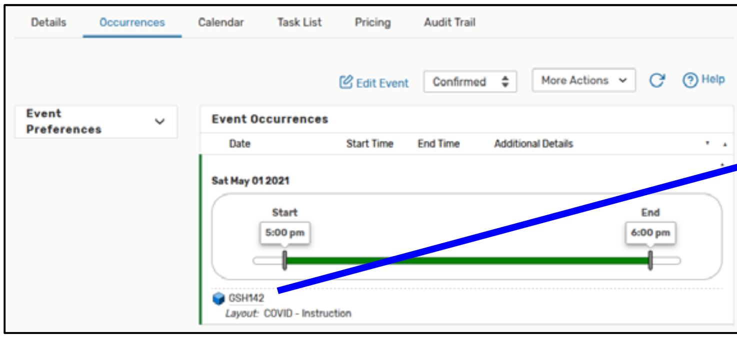
If you selected **Go to Event Details** upon saving an event, a detailed overview of the Event is presented.



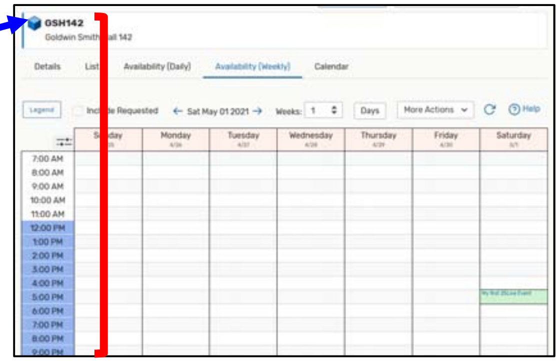
In this top section is basic information such as name, title, event-reference; date/time information; any ***assigned*** locations and resources

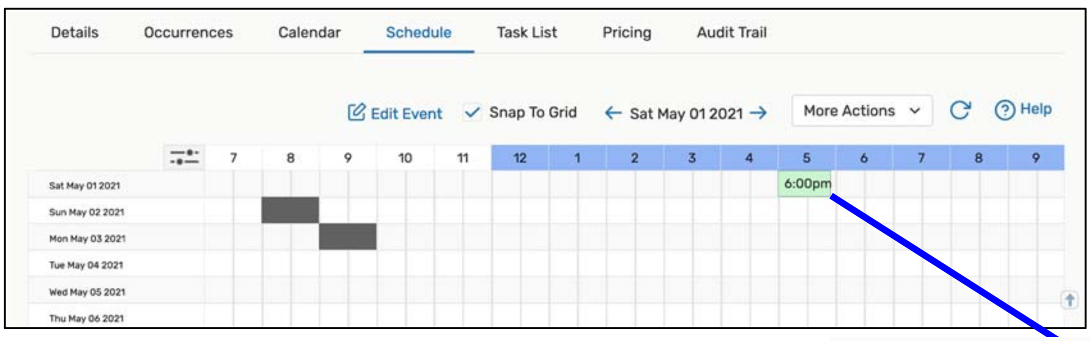
Here you can view the event by **Details, Occurrences, Calendar, Task List,** etc. Plus, options to **Edit Event**, reset the State, and select **More Actions**

This lower section changes by View. Here we see event details; occurrences list all dates and times for the event; schedule shows the event on a grid, and so on

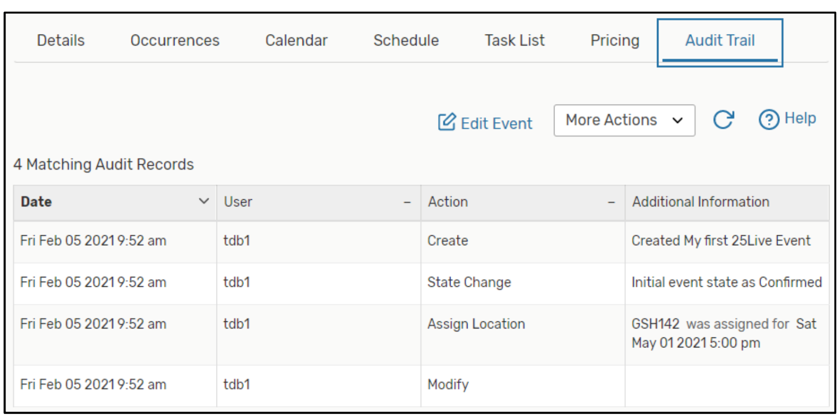


On the **Occurrences** view, a list of all occurrences is presented with links to the location availability calendars.



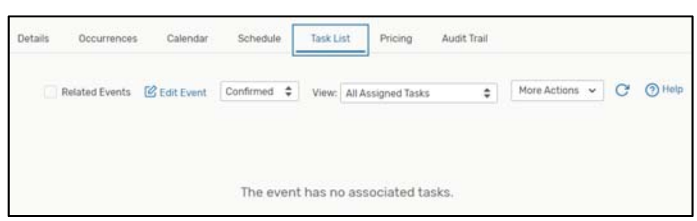


From the **Schedule** view, you can easily adjust occurrence times (though it is recommended this be done via **Edit Event** for accuracy - plus, there may be time-related approval considerations



The event's **Audit Trail** provides a list of "who did what when" including when and to whom emails were sent

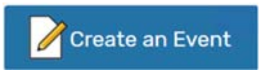
Because I had assignment rights for the event location and there were no resources, there are no event-specific tasks to view.



Activity 3A

Create at least two events: one within your assignment area and another for an online event.

1. For the in-person event, use the availability grid
   a. This is a one-time event with all **Event Activities and Features** set to "No" or "None .."
   b. Search for and select a location ***within*** your assignment area
   c. Add a 45 minute setup time
   d. Be sure to set the event state
   e. Save the event



2. Create an event using the **Create an Event** button on the 25Live main page
   a. Assign the ONLINE location
   b. Assign the American Red Cross external org to this event.
   c. Set all **Event Activities and Features** set to "No" or "None .."
   d. Add a descriptive text in the In-Depth Details, Confirmation, and Scheduler Notes
   e. What should the event state be?

3. How many tasks were assigned for this event?

4. What did you set as the head counts for these events? Would that head count differ if the second event also had an in-person component?

5. Once saved, how might you change the head count or organization or add additional notes?

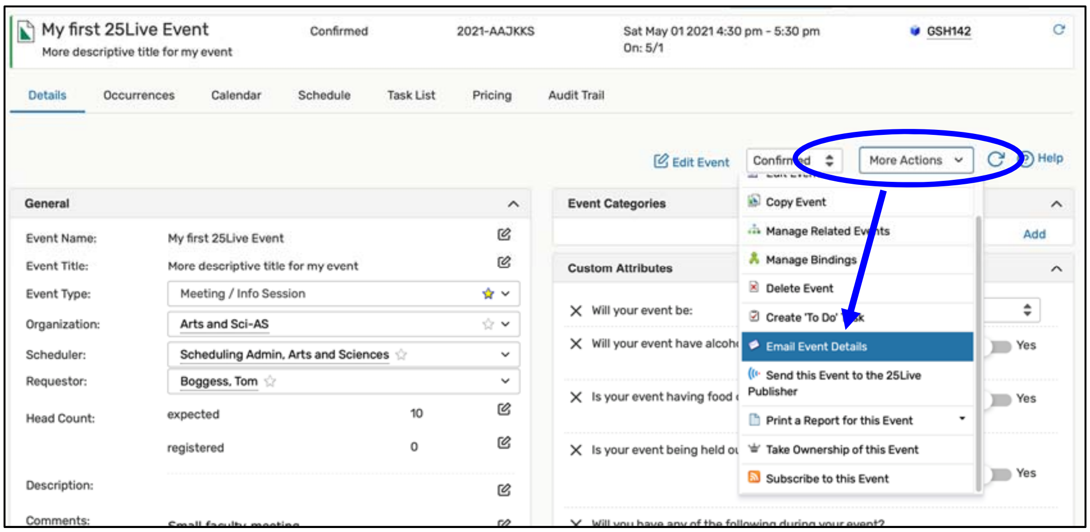
6. Open the event form and enter some basic information including an event type. Scroll down to the **Event Activities and Features** section and work your way through the questions and the associated branching questions

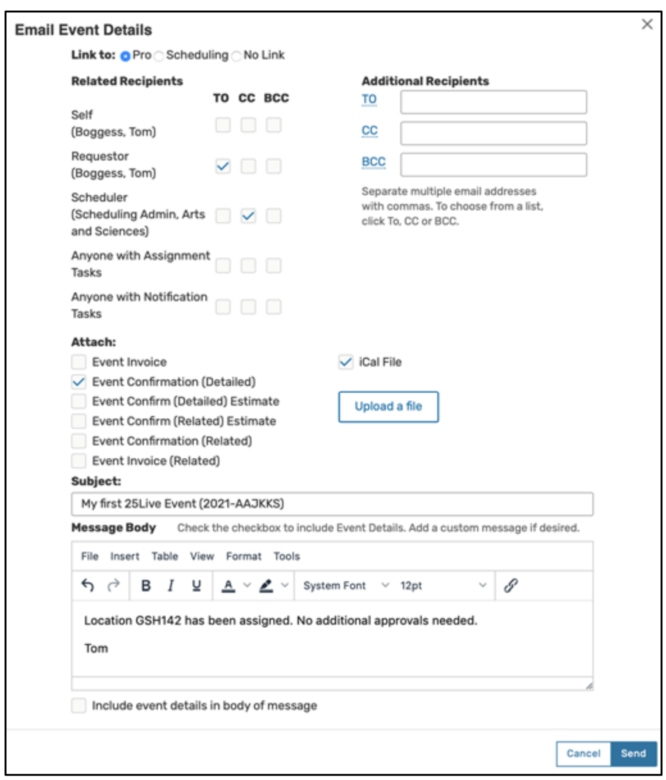
Communication with Requestors and Others

Once a location has been assigned to an event, a confirmation email needs to be sent to the requestor. If the event has any "Event Activities or Features" items in the affirmative, there will be additional approvals required before the event is **Confirmed**. However, it is helpful if the requestor knows the location has been assigned and informed whether additional approvals are required.

To this point, our examples have no approval implications, so for these, a standard confirmation email is adequate.

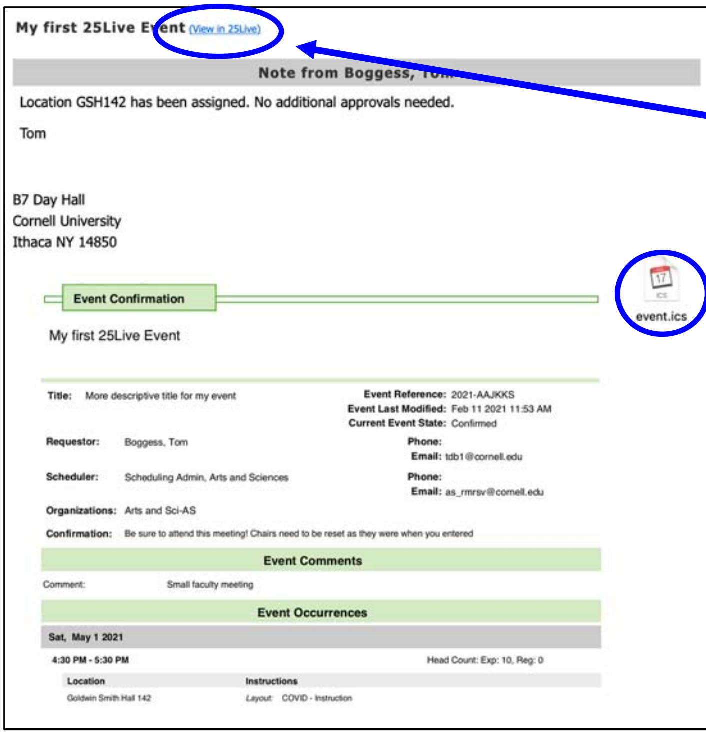
From any of the event views, use the **More Actions** dropdown and select **Email Event Details**





Recipients: Check the box(es) on the left side and/or add additional recipients. It is a good practice to CC yourself or your group email.

Attachments: Check the box(es) to indicate attachment(s) you wish to include. Note the option to upload an attachment – such as location requirements, layout info, etc. A personal message can be included as shown.



My first 25Live Event (View in 25Live)

Note from Boggess, Tom

Location GSH142 has been assigned. No additional approvals needed.

Tom

B7 Day Hall
Cornell University
Ithaca NY 14850

event.ics

Event Confirmation

My first 25Live Event

Title: More descriptive title for my event

Event Reference: 2021-AAJKKS
Event Last Modified: Feb 11 2021 11:53 AM
Current Event State: Confirmed

Requestor: Boggess, Tom
Phone:
Email: tdb1@cornell.edu

Scheduler: Scheduling Admin, Arts and Sciences
Phone:
Email: as_rmrsv@cornell.edu

Organizations: Arts and Sci-AS

Confirmation: Be sure to attend this meeting! Chairs need to be reset as they were when you entered

Event Comments

Comment: Small faculty meeting

Event Occurrences

Sat, May 1 2021

4:30 PM - 5:30 PM Head Count: Exp: 10, Reg: 0

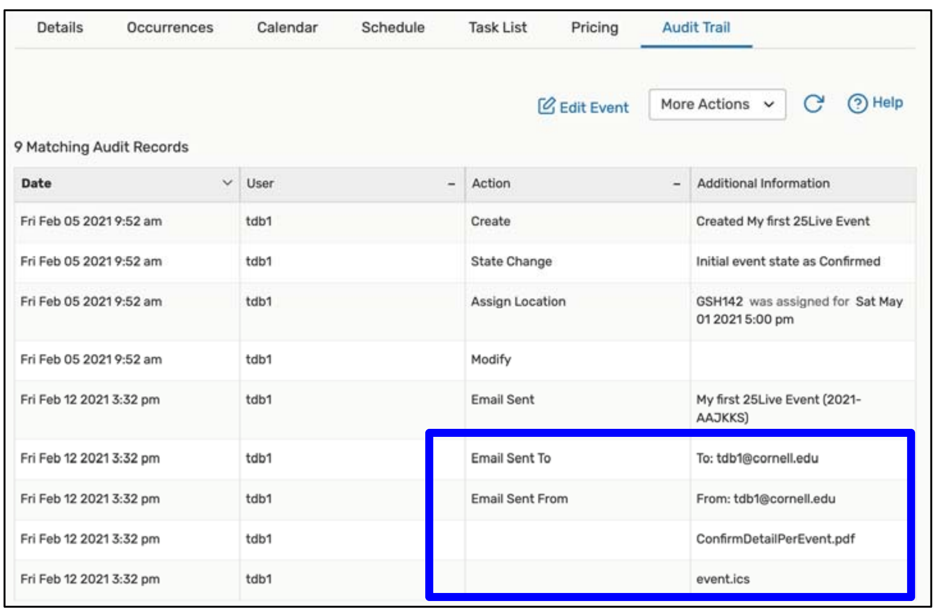
Location	Instructions
Goldwin Smith Hall 142	Layout: COVID - Instruction

The recipient can open the event by clicking on the event link.

Also, a personal calendar event can be added by clicking the "Event.ics" icon.

Had this event required additional approvals, it is recommended you mention that in the body of the email.

The email is noted in the Audit Trail.



Details Occurrences Calendar Schedule Task List Pricing Audit Trail

Edit Event More Actions Help

9 Matching Audit Records

Date	User	Action	Additional Information
Fri Feb 05 2021 9:52 am	tdb1	Create	Created My first 25Live Event
Fri Feb 05 2021 9:52 am	tdb1	State Change	Initial event state as Confirmed
Fri Feb 05 2021 9:52 am	tdb1	Assign Location	GSH142 was assigned for Sat May 01 2021 5:00 pm
Fri Feb 05 2021 9:52 am	tdb1	Modify	
Fri Feb 12 2021 3:32 pm	tdb1	Email Sent	My first 25Live Event (2021-AAJKKS)
Fri Feb 12 2021 3:32 pm	tdb1	Email Sent To	To: tdb1@cornell.edu
Fri Feb 12 2021 3:32 pm	tdb1	Email Sent From	From: tdb1@cornell.edu
Fri Feb 12 2021 3:32 pm	tdb1		ConfirmDetailPerEvent.pdf
Fri Feb 12 2021 3:32 pm	tdb1		event.ics

Activity 3B

For each of the events you created for Activity 3A, send yourself a confirmation email. Be cautious, though. If you include any other email addresses in your confirmation, they *will* be sent and likely create some confusion to the recipient. Attach a separate document to the confirmation email.

1. Did the confirmation text you added to the event form itself show in the email? Where?

2. From your email, click the "View in 25Live" link to open the event

3. Verify you can see information on the email in the Audit Trail

4. Open one of your events and add a document to the event. Does the Event Details page show information about this document?

5. If you wanted to include location use policies or information, where else might you add it to the email?

6. From the Event Details page, open the page for the Location that was assigned. Does it have a picture? A COVID capacity drawing?