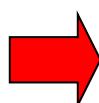


Scheduler Tools

One structural difference with R25, the precursor to 25Live, was the concept of "multiple reservations per event". This has been replaced with 25Live's "Related Events". In R25, there may be five separate reservations for, say, *ECON 2455 Review Sessions*, in 25Live, there would be five separate related events. Other examples might be a complex set of events such as a faculty poetry series. In these examples, one method to set up the related events is to create the initial event, copy it, change the necessary parameters, and then relate the copied event to the original.



If the event repeats using the same time but different dates and / or locations, best practice is to create only one event. If *times* change across dates, or if you want to give each event a different name, using related events is the better approach.

Copying Events

Start by creating an initial event for our fictitious *Faculty Poetry Series*¹³.

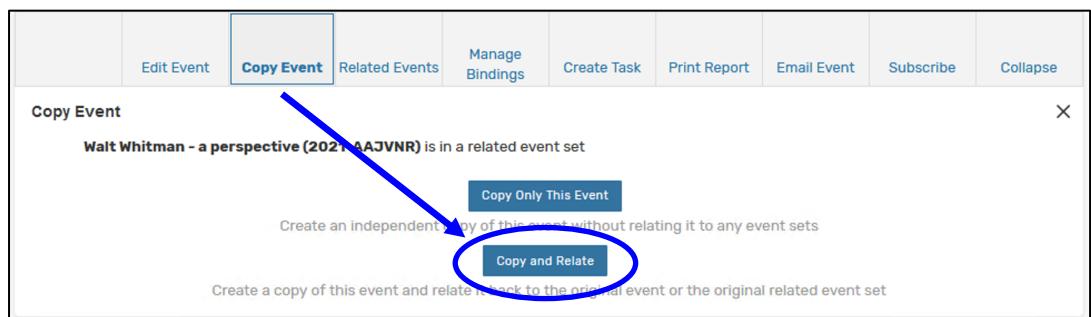
1. Create an event using **Event Form**. Enter name, title, event type,¹⁴ organization, head count, date(s), time, location, ERP items. Save.

The screenshot shows the 'Details' tab of the Event Form. At the top, the event is titled 'Walt Whitman - a perspective' with a status of 'Confirmed' and a date of 'Mon Sep 13 2021 7:00 pm - 8:30 pm'. A red circle highlights the 'More Actions' button in the top right corner. The 'General' section contains fields for Event Name, Event Title, Event Type (set to 'Conference / Community Forum'), Organization (set to 'English-AS'), Scheduler (set to 'Scheduling Admin, Arts and Sciences'), and Requestor (set to 'Boggess, Tom'). The 'Event Categories' and 'Custom Attributes' sections are also visible. Below the main form is a table titled 'Event Occurrences' with one entry: Date: Mon Sep 13 2021, Start Time: 7:00 pm, End Time: 8:30 pm, and Additional Details: GSH132.

¹³ If you are copying an event that has ERF items, be sure to remove any EMPT Resources and update any of the "Event Activities and Functions" items to No before saving

¹⁴ A couple of special Event Types such as "Umbrella Event" are available to those who create conference events or large events. Additional training is offered on how to create these events.

- To create a second event for the "Lesser Known Poems of Mark Twain" that runs from 7:30 to 9:00 PM on repeating dates, start by selecting **Copy Event** – an option in the **More Actions** list.



In this case we will select the option **Copy and Relate**. The event form is opened maintaining the data from the original for you to update as needed.

From → To

Event Name - Required (i) <input type="text" value="COPY Walt Whitman - a perspective"/>	Event Name - Required (i) <input type="text" value="Lesser Known Poems of Mark Twain"/>
Event Title (i) <input type="text" value="Faculty Poetry Series 2021 - Walt Whitman - a perspective"/>	Event Title (i) <input type="text" value="Faculty Poetry Series 2021 - Lesser Known Poems of Mark Twain"/>
Event Type - Required (i) <input type="text" value="Conference / Community Forum ★ ▾"/>	Event Type - Required (i) <input type="text" value="Conference / Community Forum ★ ▾"/>

<input type="text" value="Wed Sep 15 2021"/> <input type="text" value="7:30 pm"/> To: <input type="text" value="9:00 pm"/> <input checked="" type="checkbox"/> This begins and ends on the same day <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">Duration: 1 Hour, 30 Minutes</div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;">Additional time</div> <p>Click on the calendar below to add dates or click the Repeating Pattern button to select a date pattern.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;">Repeating Pattern</div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> << < September 2021 > >> <table border="1" style="margin-left: auto; margin-right: auto; border-collapse: collapse; text-align: center;"> <tr> <th>S</th><th>M</th><th>T</th><th>W</th><th>T</th><th>F</th><th>S</th> </tr> <tr> <td>29</td><td>30</td><td>31</td><td>01</td><td>02</td><td>03</td><td>04</td> </tr> <tr> <td>05</td><td>06</td><td>07</td><td>08</td><td>09</td><td>10</td><td>11</td> </tr> <tr> <td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td> </tr> <tr> <td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td> </tr> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>01</td><td>02</td> </tr> <tr> <td>03</td><td>04</td><td>05</td><td>06</td><td>07</td><td>08</td><td>09</td> </tr> </table> </div>	S	M	T	W	T	F	S	29	30	31	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	01	02	03	04	05	06	07	08	09
S	M	T	W	T	F	S																																												
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26	27	28	29	30	01	02																																												
03	04	05	06	07	08	09																																												

And update the dates and time to repeat on September 15, 16 from 7:30-9:00.

Then check location availability or select a different Location

The screenshot shows the Locations Search interface. A search bar at the top contains "gsh". Below it is a table with columns: Add, Name, Title, Default Capacity, Availability, and Conflict Details. Two rows are listed: "Added below" GSH132 (Goldwin Smith Hall 132: HEC Aud, capacity 32) and GSHG76 (Goldwin Smith Hall G76: Lewis, capacity 29). A modal window at the bottom details "GSH132 Goldwin Smith Hall 132: HEC Aud Capacity: 32" with "Remove" and "View Occurrences" buttons.

GSH132 can be Removed and GSHG76 can be Reserved.

Once saved, if you open either of these related events, the following text box is displayed.

The screenshot shows the "Edit Related Events" dialog. It displays a message: "Lesser Known Poems of Mark Twain (2021-AAJVNX) is in a related event set". Below this are two buttons: "Edit Only This Event" (disabled) and "Edit Selected Events" (highlighted with a blue oval). The "Edit Selected Events" button has a tooltip: "Edit each of the selected events." A blue arrow points from the "Edit Selected Events" button to a callout at the bottom stating: "All members of a related event set that are checked, will be available for editing in the event form".

All members of a related event set that are checked, will be available for editing in the event form

The screenshot shows an event form for "Walt Whitman - a perspective". At the top, there are buttons for "Add New" and "Lesser Known Poems of Mark Twain". Below the buttons, a list of checked items is shown: "Walt Whitman - a perspective" and "Lesser Known Poems of Mark Twain".

3. Rinse and repeat for as many related events as necessary. To see the complete set of related events, use the option **Related Events** from the **More Actions** list. Note the option to Add or Remove Events to the Set.

Name	Title	Reference	Type	Start Date	Start Time	State
Dickinson - New England to Hollywood	Faculty Poetry Series 2021 - Dickinson - New England to Hollywood	2021-AAJVNZ	Conference / Community Forum	Sat Sep 18 2021	7:30 pm	Confirmed
Lesser Known Poems of Mark Twain	Faculty Poetry Series 2021 - Lesser Known Poems of Mark Twain	2021-AAJVNX	Conference / Community Forum	Wed Sep 15 2021	7:30 pm	Confirmed
Walt Whitman - a perspective	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAJVNR	Conference / Community Forum	Mon Sep 13 2021	7:00 pm	Confirmed

4. To use this related event set as a "template" for a future set of events, use the **Copy Event** option, select the events you want to copy and select **Copy and Create New Set**

<input checked="" type="checkbox"/>	Name	Title	Reference	Type	Start Date	Start Time	State
<input checked="" type="checkbox"/>	Dickinson - New England to Hollywood	Faculty Poetry Series 2021 - Dickinson - New England to Hollywood	2021-AAJVNZ	Conference / Community Forum	Sat Sep 18 2021	7:30 pm	Confirmed
<input checked="" type="checkbox"/>	Lesser Known Poems of Mark Twain	Faculty Poetry Series 2021 - Lesser Known Poems of Mark Twain	2021-AAJVNX	Conference / Community Forum	Wed Sep 15 2021	7:30 pm	Confirmed
<input checked="" type="checkbox"/>	Walt Whitman - a perspective	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAJVNR	Conference / Community Forum	Mon Sep 13 2021	7:00 pm	Confirmed

5. You also can create a search of Related events by viewing **Details** of a related event and clicking on [View as Search Results](#) in the **Event Relationships** section.

Walt Whitman - a perspective ☆ Confirmed 2021
Faculty Poetry Series 2021 - Walt Whitman - a perspective

Details Occurrences Calendar Task List Pricing

General

Tasks Completed

Event Relationships

Related Events:

- Lesser Known Poems of Mark Twain
- Dickinson - New England to Hollywood

[View as Search Results](#)

The Search page will open and you can save the search with a meaningful name.

2021 Poetry Series

Reset | Export Results | Save | Save As | Search

Search Actions

List Calendar ← All Dates → Days: 1 Future Only All Dates Choose Columns Help

3 Matching Events

Name	Title	Reference	Organizations	Type	Start Date	Start Time	Creation Date	State	Locations
Dickinson - New England to Hollywood	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAJVNZ	English-AS	Conference / Community Forum	Sat Sep 18 2021	7:30 pm	Wed Mar 31 2021 6:39 am	Confirmed	GSH076
Lesser Known Poems of Mark Twain	Faculty Poetry Series 2021 - Lesser Known Poems of Mark Twain	2021-AAJVNX	English-AS	Conference / Community Forum	Wed Sep 15 2021	7:30 pm	Wed Mar 31 2021 6:29 am	Confirmed	GSH076
Walt Whitman - a perspective	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAJVNR	English-AS	Conference / Community Forum	Mon Sep 13 2021	7:00 pm	Tue Mar 30 2021 5:55 pm	Confirmed	GSH132

Relating Existing Events

Separately created events also can be related. To start, search for and open one of the existing events to the **Details** view.

Select Object:

Quick Search Advanced

ECON 1001 001

Hint: Type : to use SeriesQL.

Search has not been saved

Reset | Export Results | Save | Save As | Search

Organizations + Types + Categories + Roles + States +

List Calendar ← All Dates → Days: 1 Future Only All Dates Choose Columns Help

4 Matching Events

Name	Title	Reference	Organizations	Type	Start Date	Start Time	Creation Date	State	Locations
ECON 1001 001 - Boggess Office Hours	ECON 1001 001 - Boggess Office Hours	2021-AAJVPA	Economics-AS	Class Related	Thu Sep 09 2021	5:00 pm	Wed Mar 31 2021 7:02 am	Confirmed	GSH142
ECON 1001 001 2797	Prin of Micro Econ-Supplement	2021-AAJNZG	ECON	Class	Wed Sep 01 2021	7:30 pm	Tue Mar 30 2021 1:21 pm	Confirmed	
ECON 1001 001	Prin of Micro	2020-AAHGTN	ECON	Class	Tue Jun 23 2020	6:00 pm	Sat Mar 07 2020	Cancelled	

Use **More Actions > Related Events**. The resulting text box has a built-in search. From the search results check the box for those you'd like related and click on **Add Selected**

Related events can be viewed in the **Details** view, scroll down to the **Event Relationships** section

Cancelling Events



When an event needs to be cancelled, any scheduler can set the status to cancelled. Cancelling an event should be in coordination and communication with other interested parties.

If an event is part of a set of related events *only* the event marked as cancelled is cancelled. All others maintain their original state and all remain in the set of Related Events.

Name	Title	Reference	Type	Start Date	Start Time	State
tdb1 test for conv, R25-666168	tdb1 test for conv	2019-AACKAB	R25 CONVERSION EVENT	Tue Dec 01 2020	3:25 pm	Cancelled
tdb1 test for conv, R25-666670	tdb1 test for conv	2019-AABNAF	R25 CONVERSION EVENT	Sat Dec 26 2020	7:00 pm	Confirmed
tdb1 test for conv, R25-666943	tdb1 test for conv	2019-AABNAQ	R25 CONVERSION EVENT	Thu Dec 31 2020	11:00 pm	Confirmed
tdb1 test for conv, R25-667001	tdb1 test for conv	2019-AABNAH	R25 CONVERSION EVENT	Wed Dec 30 2020	4:00 pm	Confirmed
tdb1 test for conv, R25-667443	tdb1 test for conv	2019-AABNAJ	R25 CONVERSION EVENT	Tue Dec 01 2020	1:00 pm	Confirmed

Audit Trail

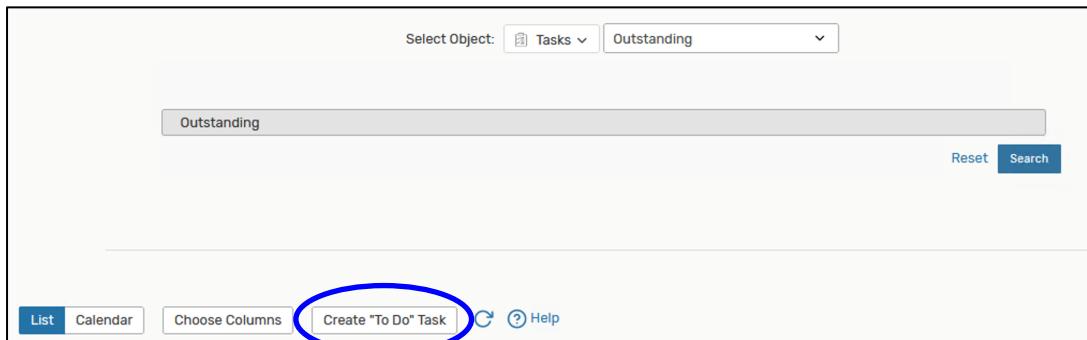
As work is performed on events an "audit trail" is built and saved in 25Live. If you need to verify when a particular task was completed and by whom, you can check the Audit Trail for details. One example is when emails were sent. The contents of the emails are not preserved here which is one reason you should be copied on all outgoing emails.

To access the event history, open event **Details** and click on **Audit Trail**

Date	User	Action	Additional Information
Tue Jan 07 2020 10:35 am	cjm354	Create	Created Cathy's Boozy Party for Tom
Tue Jan 07 2020 10:35 am	cjm354	State Change	Initial event state as Tentative
Tue Jan 07 2020 10:35 am	cjm354	Modify	
Tue Jan 21 2020 12:24 pm	tdb1	Name Changed	Changed name from Cathy's Boozy Party for Tom
Tue Jan 21 2020 12:24 pm	tdb1	Modify	
Tue Jan 21 2020 12:26 pm	tdb1	Assign Location	GSHG22 was assigned for Mon Apr 27 2020 5:30 pm
Tue Jan 21 2020 12:26 pm	tdb1	Modify	
Tue Jan 21 2020 12:27 pm	tdb1	Email Sent	Cathy's Boozy Party (2020-AACVVC)
Tue Jan 21 2020 12:27 pm	tdb1	Email Sent To	To: cjm354@cornell.edu
Tue Jan 21 2020 12:27 pm	tdb1	Email Sent From	From: tdb1@cornell.edu
Tue Jan 21 2020 12:27 pm	tdb1		ConfirmDetailPerEvent.pdf
Tue Jan 21 2020 12:35 pm	API-access	Modify	
Tue Jan 21 2020 12:37 pm	API-access	Modify	
Tue Jan 21 2020 2:26 pm	tdb1	Assign Location	GSHG22 was assigned for Thu May 14 2020 5:30 pm

To Do Items

Additional items can be added to your task list in the form of "To Do" items. These can act as reminders for yourself or to inform or remind any other 25Live user. An email notification will be sent automatically. If you are on the **Tasks** page, there is a button to **Create a "To Do" Task**, or the option can be found in **More Actions > Create Task**.



Create "To Do" Task

- Task Name:** Contact Aryn re: Loc Security
- Assigned By:** Boggess, Thomas
- Comment:** Before copy PROD to TEST
- Due Date:** Wed Jan 22 2020
- Assigned To:** Boggess, Thomas

Create "To Do" Task

Success!

Your "To Do" Task has been created.

Create Another "To Do" Task

Outstanding

Event	Title	Task Item	Type	Status	Actions	Respond By	First Date	Reference	Assigned By	Assigned To	Scheduler
Aryn's Event	Apostrophe Test "	ADW109	Assign	In Progress	<input type="button" value="Assign"/> <input type="button" value="Deny"/>	Mon Dec 23 2019	Mon Dec 23 2019	2019-AACKBW	Taylor, Aryn	You	Taylor, Aryn
none		Contact Aryn re: Loc Security	To Do	In Progress	<input type="button" value="Assign"/> <input type="button" value="Deny"/> <input type="button" value="Complete"/> <input type="button" value="Ignore"/>	Wed Jan 22 2020			Boggess, Thomas	You	

Starred Objects

Objects can be "starred" or added to favorites by clicking the Star near the object. These starred objects can be used in searches.

The screenshot shows a search interface for 'Your Starred Events'. At the top, there's a dropdown menu 'Select Object' with options 'Events' and 'Your Starred Events'. Below it is a search bar with placeholder text 'Your Starred Events' and buttons for 'Reset' and 'Search'. Underneath the search bar are navigation buttons: 'List' (selected), 'Calendar', 'All Dates', 'Days: 1', 'Future Only', 'All Dates' (selected), 'Choose Columns', and 'Help'. A message '2 Matching Events' is displayed above a table. The table has columns: Name, Title, Reference, Organizations, Type, Start Date, Start Time, Creation Date, State, and Locations. Two events are listed:

	Name	Title	Reference	Organizations	Type	Start Date	Start Time	Creation Date	State	Locations
★	ECON 1001 001 - Boggess Office Hours	ECON 1001 001 - Boggess Office Hours	2021-AAJVPA	Economics-AS	Class Related	Thu Sep 09 2021	5:00 pm	Wed Mar 31 2021 7:02 am	Confirmed	GSH142
★	ECON 1001 001 2797	Prin of Micro Econ-Supplement	2021-AAJNZG	ECON	Class	Wed Sep 01 2021	7:30 pm	Tue Mar 30 2021 1:21 pm	Confirmed	

Activity 8A

1. Create an event that you'd like to keep separate by name. Save a search that lists all the related events in this set.
2. Copy and relate the event created in 1 and give it a new name and time.
 - What about the location?
3. Create a reminder to check on these events a week before it is scheduled to start