Adjusting Events: Locations and Dates

Consider three types of Events
- Class events (not Class-Related events)
- non-class events with **no** ERP item marked as "Yes"
- non-class events with any ERP item marked as "Yes", spans the 11PM hour, or includes ERP Resources

Editing Classes

Class events: only the location should be changed in 25Live. The data of record for classes is PeopleSoft and any change to time, day, enrollment or room caps, etc. needs to be initiated in PeopleSoft via CCI changes. Once applicable changes have been made in PeopleSoft, the class will be reloaded into 25Live.[8] Changes to location can be made in 25Live at any time without making changes in PeopleSoft and the location will be updated in PeopleSoft in near real time. More details on class events will be covered in Module 7.

That said, when a single or few occurrences need to be cancelled for a class, follow the following steps to make that date/time available for other events:

1. find the class
2. use **Edit Event** and navigate to the **Date and Time** section
3. click on **View All Occurrences**
4. scroll to the date in question
5. change the state from **Active** to **Cancelled**
6. save

Note: If the class is meeting in one location for a specified number of repeating dates and another location for a different set of repeating dates/times, an additional meeting pattern would need to be added to PeopleSoft via CCI, not in 25Live.

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8 Changes made in CCI are reviewed before being updated in PeopleSoft, so it may take a few days before the change is reflected in 25Live.

Editing Events with NO Approvals	**Non-class events where none of "Event Activities and Features" are marked as "Yes"**: General requestors can view and update a limited set of items such as the event title, upload a file, and add event information and setup for their event at creation time. Any other changes such as a date or time change, location change, event state, etc. must be done by the scheduler.
	For example, if the requestor needs to change the date or time, the scheduler will open the event using **Edit Event** and update the relevant item(s): date, time, repeat pattern, location, event state, and so on.
	As a scheduler, you can open *any* event and alter the parameters including removing existing location assignments. However, good practice dictates that you do so only for those events scheduled in locations for which you have assignment rights or in coordination with the existing Scheduler.
Editing Events with Approval items	**Non-class events where any of "Event Activities and Features" are marked as "Yes", spans the 11PM hour, or includes UET resources**: Events with positive responses to any of the Event Activities and Features questions need special and careful attention when changing parameters such as date, time or location. At the very least, the Scheduler would need to contact the Event Approver (or Clearing House) to authorize any change in venue or date. The Event approver would need to review the event and re-approve or deny the change.
Steps to Change Event Dates or Location	Once you determine it is appropriate to change the event parameters, use the following steps (this example is one where only the room needed to be assigned, no other approvals were necessary)

1. Find the event.

2. Check the state and ERP status in the **Detail** view and dates in the **Occurrences** view

3. Open the Event using **Edit Event**

4. Use the Navigation bar to jump to the section to edit (e.g., Date and Time)

5. If removing an occurrence, click on "**View all Occurrences**" and click **Remove** or click on any reserved date on the calendar

6. To add an occurrence, click on a date in the calendar

7. When adding or changing dates, be sure to check for location availability

Which may show a conflict:
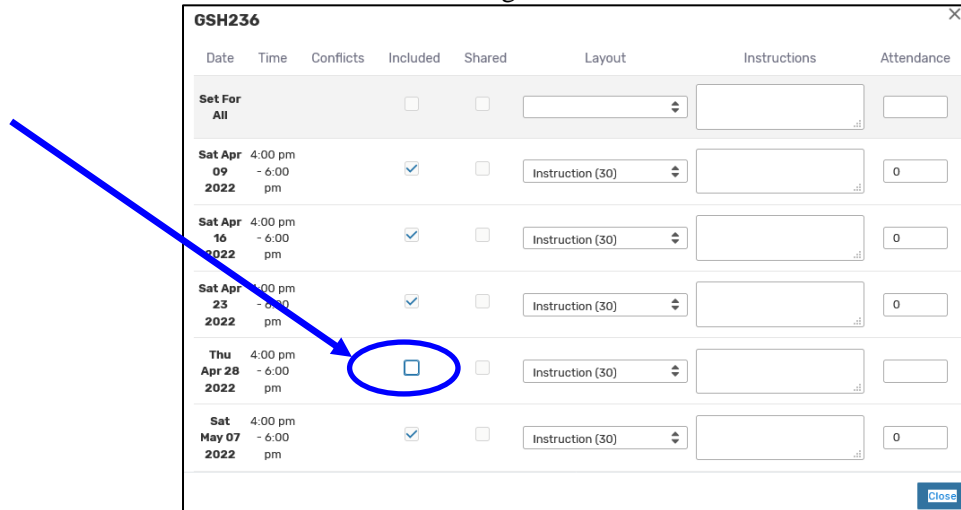
8. To change a location, go to **Location** section

9. Open **View Occurrences** for the specific locations

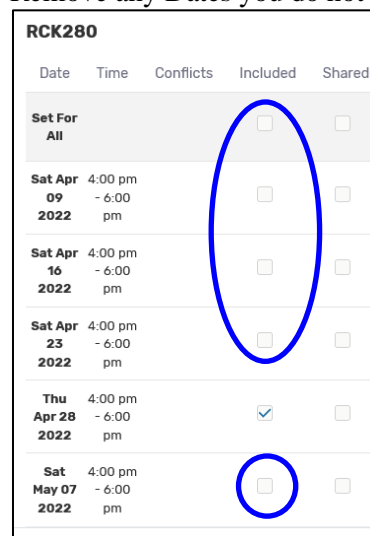
10. Remove the Location for a given Date

11. Search for another space and Reserve (or Request)

Add	Name	–	Title	–	Default Capacity	–	Availability	Conflict Details
Added below	RCK280		Rockefeller Hall 280		28		5/5	None

12. Remove any Dates you do not want to assign to that location

13. Save

Activity 6A

1. Adjust event dates for an event that does **not** have any Event Activities and Features" marked as "Yes"

2. Create and save a repeating date event for Friday evenings in April and May 2022 in your area

3. Change one of the dates from a Friday to the preceding Saturday

4. Add two locations for one of the recurring dates

5. What are the considerations if date or location needs to change for an event that has tasks other than the location assignment?

6. A class is not going to meet on a specific date.
   a. Alter a class so the location is available for other events to use.
   b. What do you need to do if later it turns out the class is going to meet that day?
   c. What changes are reflected in PeopleSoft based on these class alternations?

Resources and Organizations

Resources

Similar to locations, a resource is an item that can be requested and assigned to an event. We have reviewed how UET resources are added to an event via the Event Form. In addition to these resources, items such as AV equipment, tables, chairs, and other items that are not affixed to a location can be added as a 25Live resource.

Robert Purcell Community Center Resources:

Name	Quantity Available	Conflict Details
RPC Flat Screen TV Cart	2 / 2	None
RPC Freestanding Whiteboard Signs	8 / 8	None
RPC LCD Projector	3 / 3	None
RPC Mic/Speaker Combo	2 / 2	None
RPC Portable Projector Screen	2 / 2	None
RPC Poster Board	22 / 22	None

Note. Like locations, resources use the three-letter building code to differentiate where the resources belong. These resources are not generally transferrable meaning that a resource available to the Robert Purcell Community Center is not used for events in, say, Goldwin Smith Hall. Each resource can have a designated quantity. This prevents over assignment of the resource at a particular date and time.

Organizations

Organizations are of several types in 25Live: Class Subjects, Student Orgs, Cornell KFS Orgs, and non-Cornell Orgs. Class Subjects are *only* used for classes.[9]

Student Orgs

25Live student orgs contain a list of all student orgs that have ever been added to 25Live, whether currently registered or not. You can use search functionality to identify registered student orgs for a particular academic year.

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[9] In R25, Subjects were used as a proxy for academic departments. In 25Live, use the KFS Org for Events.

Student organizations register each academic year with the Campus Activities Office and their "approved" status is updated regularly in 25Live. For risk management reasons **only** registered student organizations can have recurring events scheduled in 25Live. That said, a non-repeating organizational meeting can be scheduled for students orgs that have submitted their paper work but registration is not yet complete. To determine the registration status, use the following URL:

https://cornell.campusgroups.com/club_signup to search for the organization of interest.

Note: "STDNT ORG" is appended to the student organization name and may truncate part of the name. The title will match what is in Campus Groups data.

25Live:

KFS Orgs

To represent the broad set of Cornell Organizations, KFS (Kuali Financial System) orgs are used. As the name implies, these are organizations associated with Cornell financial accounts. They also are associated with the organizations found in the Facilities Inventory System. Effort was made to remove organization that the area deemed as inappropriate for scheduling purposes. Scheduling Support will review these orgs and update them on a regular basis.

KFS Orgs are hierarchical by nature and each org has been associated with their higher, parent, org and assigned the relevant 25Live category. For example, Arts and Sciences is a high-level org that has a large number of KFS Orgs associated with it. We have appended an abbreviation to each org to indicate its grouping.

Non-Cornell Orgs

Non-Cornell organizations are orgs external to Cornell that may be associated with events. Consider the American Red Cross or Ithaca High School as such external orgs. These need to be assigned as the "Primary Org" on an event with an additional Cornell "sponsoring" org. For example, if the *Absolute A Cappella* student group wanted to sponsor a blood drive. They would add **American Red Cross** as the primary org and **Absolute A Cappella-STDNT ORG** as the Cornell sponsoring organization. At go-live we didn't have a set of external orgs defined, so requestors will need to use the organization named **Organization Not Found In List** and include organization information in the question "You selected 'Organization Not in List,' please describe the organization that is missing."

Activity 6B

1. Are there any AV resources associated with the Willard Straight Hall?

2. Is Absolute A Cappella registered for this academic year? How can you be sure?

3. Organizations in 25Live have a "rating". How might you determine the rating for a particular organization?