## Mod 8 Scheduler Tools

As we saw in Module 7, classes with multiple meeting patterns are represented as "segments" in 25Live. Another way to associate events is creating sets of related events. For example, consider a related set of events associated with a conference.

One method to set up related events is to create the initial event, copy it as a part of a related set, change the necessary parameters, and save.
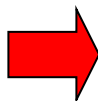
> If the event repeats using the same time but different dates and / or locations, best practice is to create only one event. If *times* change across dates, or if you want to give each event a different name, using related events is the better approach.

Copying Events

Start by creating an initial event for our fictitious *Faculty Poetry Series*[11].

1. Create an event using **Event Form**. Enter name, title, event type,[12] organization, head count, date(s), time, location, ERP items. Save.

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[11] If you are copying an event that has ERF items, be sure to remove any EMPT Resources and update any if the ERP items before saving

[12] A couple of special Event Types are available to those who create conference events or large events such as "Reunions" or "Graduation". Additional training is offered on how to create these events.

2. To create a second event for the "Mark Twain's Lesser Known Poems" that runs from 7:30 to 9:00 PM on either Thursday or Friday, start by selecting **Copy Event** – an option under **More Actions**

The following section will appear

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.

And update the dates and time,

Then check location availability or select a different Location. You may find the location is only available on one of the two dates. Choose the earliest available date.

Once saved, if you open the event, the following text information is displayed.

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

3. Rinse and repeat for as many related events as necessary including preexisting events such as a related class shown below. To see the complete set of related events, use the option **Manage Related Events** under **More Actions**. Note the options at the lower right.

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**

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.

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

Relating Events

Separately created events also can be related. To start, search for and open one of the existing events to the **Details** view. Above, ENGL3840 and the class-related office hours were related. And then this set was related to he poetry series.

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**

The checked events are now related and can be viewed via **More Actions > Related Events**

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.

> Saving an event in the Cancelled state releases any location and resource assignments. Only users with the required security permissions may edit an event that has been cancelled.
>
> OK   Cancel

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.
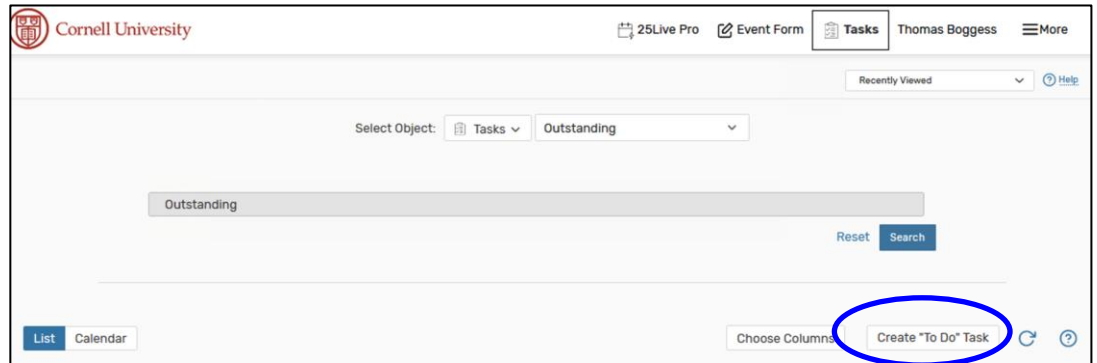

Audit Trail

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.

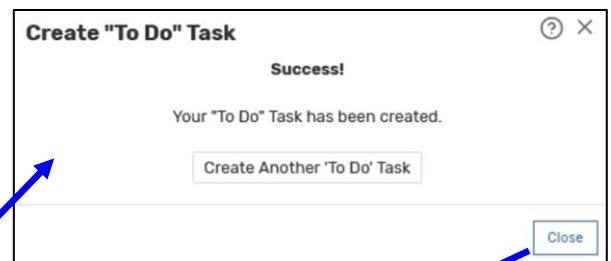To access the event history, open event **Details** and click on **Audit Trail**

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 a "To Do" Task**.

To see to do items with a Respond By date beyond 30 days, you will need to create a search. To see the Advanced Task Search button, click on "Reset"

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.

Activity 8A

1. Create a set of three events that you would like to relate. Save a search that lists all the related events in this set.

2. Copy the related set in 1. to a new related set and change the dates, times and locations.
   - What kinds of events would benefit from a copied related set?

3. Create a reminder to check on an event a week before it is scheduled to start