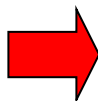


## Mod 8 Scheduler Tools

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*<sup>11</sup>.

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

The screenshot shows the 'Event Form' in 25Live. The event is titled 'Walt Whitman - a perspective' and is confirmed for 'Mon Oct 11 2021 7:00 pm - 9:00 pm' at 'GSHG64'. The 'More Actions' button is circled in blue. The form is divided into several sections: 'General' (Event Name, Title, Type, Organization, Scheduler), 'Event Categories', 'Custom Attributes' (Will your event be hosted?, Will your event have alcohol?), and 'Event Occurrences' (a table with Date, Start Time, End Time, and Additional Details).

Date	Start Time	End Time	Additional Details
Mon Oct 11 2021	7:00 pm	9:00 pm	GSHG64

<sup>11</sup> 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

<sup>12</sup> 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.

- 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**

Walt Whitman - a perspective ☆ Confirmed 2021-AAKJZM Mon Oct 11 2021 7:00 pm - 9:00 pm GSHG64

Faculty Poetry Series 2021 - Walt Whitman - a perspective

Edit Event Copy Event Related Events Manage Bindings Create Task Print Report Email Event Subscribe Collapse

The following section will appear

**Copy Event**

Walt Whitman - a perspective (2021-AAKJZM) is in a related event set

Copy and Create New Set

Create copies of each of the selected events and relate them in a new related event set

Copy and Relate

Create a copy of this event and relate it back to the original event or the original related event set

Copy Only This Event

Create an independent copy of this event without relating it to any event sets

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.

**Event Name - Required** ⓘ

COPY Walt Whitman - a perspective

**Event Title** ⓘ

Faculty Poetry Series 2021 - Walt Whitman - a perspective

**Event Type - Required** ⓘ

Conference / Community Forum ☆ ▼

**Event Name - Required** ⓘ

Mark Twain's Lesser Known Poems

**Event Title** ⓘ

Faculty Poetry Series 2021 - Mark Twain's Lesser Known Poems

**Event Type - Required** ⓘ

Conference / Community Forum ☆ ▼

**Date and Time - Required** ⓘ

Thu Oct 14 2021

7:30 pm

To:

9:00 pm

☒ This begins and ends on the same day

Duration:

1 Hour, 30 Minutes

**Additional time** ▼

Click on the calendar below to add dates or click the **Repeating Pattern** button to select a date pattern.

Repeating Pattern

<< < October 2021 > >>

S	M	T	W	T	F	S
26	27	28	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

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.

### Edit Related Events

Mark Twain's Lesser Known Poems (2021-AAKJZQ) is in a related event set

Edit Only This Event  
Edit only this event.  
Edit Selected Events  
Edit each of the selected events.

<input checked="" type="checkbox"/>	Name	Title	Reference	Type	Start Date	Start Time	State
<input checked="" type="checkbox"/>	Mark Twain's Lesser Known Poems	Faculty Poetry Series 2021 - Mark Twain's Lesser Known Poems	2021-AAKJZQ	Conference / Community Forum	Fri Oct 15 2021	7:30 pm	Tentative
<input checked="" type="checkbox"/>	Walt Whitman - a perspective	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAKJZM	Conference / Community Forum	Mon Oct 11 2021	7:00 pm	Confirmed

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

Add New
Mark Twain's Lesser Known Poems X
Walt Whitman - a perspective X

Reference: 2021-
Request an Event

- 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.

### Manage Related Events

Mark Twain's Lesser Known Poems (2021-AAKJZQ) is in a related event set

Add Events to Set  
Remove Events from 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-AAKJZR	Conference / Community Forum	Sat Oct 16 2021	7:30 pm	Confirmed
ENGL 3840 101 - Washburn Office Hours	ENGL 3840 101 - Washburn Office Hours	2021-AAKJZN	Class Related	Tue Sep 07 2021	5:00 am	Confirmed
ENGL 3840 101 2797	Poetry Writing	2021-AAKATN	Class	Mon Aug 30 2021	12:25 pm	Confirmed
Mark Twain's Lesser Known Poems	Faculty Poetry Series 2021 - Mark Twain's Lesser Known Poems	2021-AAKJZQ	Conference / Community Forum	Fri Oct 15 2021	7:30 pm	Tentative
Walt Whitman - a perspective	Faculty Poetry Series 2021 - Walt Whitman - a perspective	2021-AAKJZM	Conference / Community Forum	Mon Oct 11 2021	7:00 pm	Confirmed

- 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**

**Copy Event**

Mark Twain's Lesser Known Poems (2021-AAKJZQ) is in a related event set

Create copies of each of the selected events and relate them in a new related event set

Create a copy of this event and relate it back to the original event or the original related event set

Create an independent copy of this event without relating it to any event sets

Copy and Create New Set

Copy and Relate

Copy Only This Event

Add New COPY ENGL 3840 101 - Washburn Office Hou X COPY Mark Twain's Lesser Known Poems X COPY Walt Whitman - a perspective X

COPY ENGL 3840 101 2797 X COPY Dickinson - New England to Hollywoo X

- 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.

**Event Relationships**

Related Events:

- ENGL 3840 101 2797
- Walt Whitman - a perspective
- ENGL 3840 101 - Washburn Office Hours
- Dickinson - New England to Hollywood

[View as Search Results](#)

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

5 Matching Events

	Name	Title	Reference	Organizations	Type	Categories	Your Role	Start Date	Start Time	Creation Date	Status	Locations	Resources	Scheduler	Requestor
☆	Dickinson - New England to Hollywood	Faculty Poetry Series 2021 - Dickinson - New England to Hollywood	2021-AAKJZR	English-AS	Conference / Community Forum		Requestor	Sat Oct 16 2021	7:30 pm	Wed Aug 04 2021 6:10 am	Confirmed	GSHG64		Arts and Sciences Scheduling Admin	Tom Boggess
☆	ENGL 3840 101	ENGL 3840 101	2021-AAKJZR	English-AS	Class Related			Tue Sep 07 2021	5:00 am	Wed Aug 04 2021	Confirmed	GSH144		Arts and Sciences	Casey Washburn

## 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 the 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**

Manage Related Events

Boguess - ECON 4500 Office Hours (2020-AACVVQ) is not currently in a related event set

Return to Set

Find Events to Relate:

econ 4500

Filter by event search. v

Search

Clear Search

Show Selected

Add Selected

	Name v	Title	Reference	Type	Start Date	Start Time	State
<input type="checkbox"/>	AEM 4500 001 CS 2755	Resource Economics	2019-AACSSS	Class	Fri Jan 24 2020	10:10 am	Tentative
<input checked="" type="checkbox"/>	Boguess - ECON 4500 Office Hours	Economics 4500 Office Hours - Tom Boguess 2755	2020-AACVVQ	Class Related	Tue Jan 28 2020	4:30 pm	Confirmed
<input checked="" type="checkbox"/>	ECON 4500 Review Sessions	Economics 4500 Review Sessions	2020-AACVZC	Class Related	Wed Apr 15 2020	6:00 pm	Confirmed

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

Manage Related Events

Boguess - ECON 4500 Office Hours (2020-AACVVQ) is in a related event set

Name v	Title	Reference	Type	Start Date	Start Time	State
Boguess - ECON 4500 Office Hours	Economics 4500 Office Hours - Tom Boguess 2755	2020-AACVVQ	Class Related	Tue Jan 28 2020	4:30 pm	Confirmed
ECON 4500 Review Sessions	Economics 4500 Review Sessions	2020-AACVZC	Class Related	Wed Apr 15 2020	6:00 pm	Confirmed

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

Boguess - ECON 4500 Office Hours

Confirmed

2020-AACVVQ

Tue Jan 28 2020 4:30 pm - 5:00 pm

GSH144

Economics 4500 Office Hours - Tom Boguess 2755

Repeats every week on Tuesday through 4/28

Details

Occurrences

Calendar

Schedule

Task List

Pricing

Audit Trail

Edit Event

Confirmed

More Actions

General

Tasks Completed

Event Relationships

Event Categories

Custom Attributes

Event Info

Related Events:

ECON 4500 Review Sessions

50 MODULE 8 - SCHEDULER TOOLS

JULY 2021

CORNELL AND COLLEGENET PROPRIETARY AND CONFIDENTIAL

## Cancelling Events

Cancelled

Tentative

Confirmed

Cancelled

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.

OKCancel

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.

tdb1 test for conv; R25-666168

Cancelled

2019-AACKAB

Tue Dec 01 2020 4:00 pm - 5:00 pm

Repeats every day through 12/31

DetailsOccurrencesCalendarScheduleTask ListPricingAudit Trail

Edit EventCancelledMore Actions

General

Event Categories

Tasks Completed

Custom Attributes

Event Relationships

Event Info

Related Events:

tdb1 test for conv; R25-666168

tdb1 test for conv; R25-666943

tdb1 test for conv; R25-667001

tdb1 test for conv; R25-667143

tdb1 test for conv; R25-667143 (2019-AABNAJ) is in a related event set						
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-AABNAG	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; R25-667143	tdb1 test for conv	2019-AABNAJ	R25 CONVERSION EVENT	Tue Dec 01 2020	1:00 pm	Confirmed

## Audit Trail

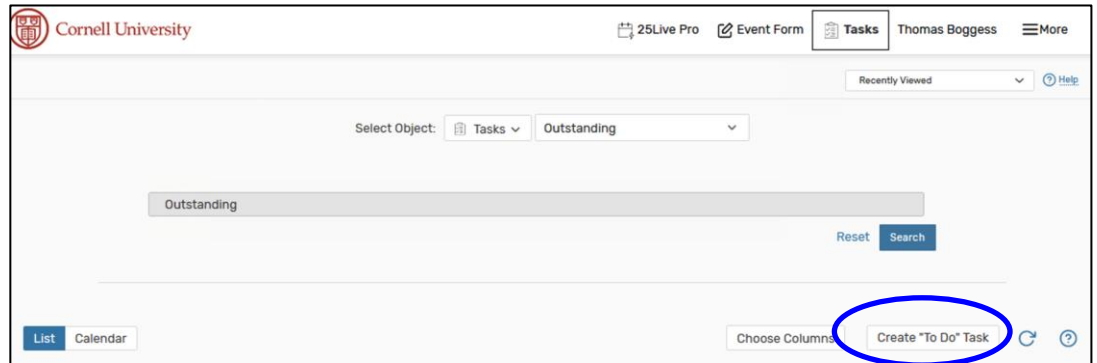
As work is performed on events an "audit trail" is built and saved in 25Live. If you need to verify when a particular task was completed and by whom, you can check the Audit Trail for details. One example is when emails were sent. The contents of the emails are not preserved here which is one reason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

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

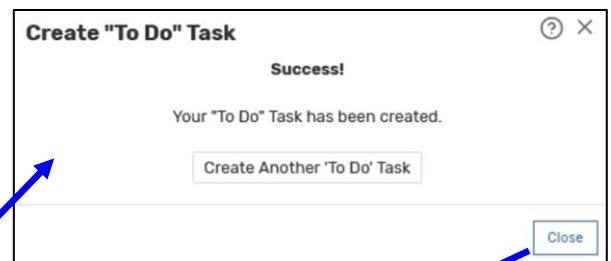
DetailsOccurrencesCalendarTask ListPricingAudit Trail					
<div>Edit EventHelp</div>					
13 Matching Audit Records					
Date	User	Action	Additional Information		
Wed Aug 04 2021 6:10 am	tdb1	Create	Created Dickinson - New England to Hollywood		
Wed Aug 04 2021 6:10 am	tdb1	State Change	Initial event state as Tentative		
Wed Aug 04 2021 6:10 am	tdb1	Assign Location	GSHG64 was assigned for Sat Oct 16 2021 7:30 pm		
Wed Aug 04 2021 6:10 am	tdb1	Modify			
Wed Aug 04 2021 6:11 am	tdb1	State Change	Changed event state from Tentative to Confirmed		
Wed Aug 04 2021 6:15 am	tdb1	Modify			
Wed Aug 04 2021 6:15 am	tdb1	State Change	Changed event state from Confirmed to Cancelled		
Wed Aug 04 2021 6:15 am	tdb1	Remove Location	GSHG64 was removed from Sat Oct 16 2021 7:30 pm		
Wed Aug 04 2021 6:15 am	tdb1	Modify			
Wed Aug 04 2021 12:05 pm	tdb1	State Change	Changed event state from		

## 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**.



The 'Create "To Do" Task' form is shown. It includes fields for 'Task Name' (Contact Aryn re: Loc Security), 'Assigned By' (Boggess, Thomas), 'Comment' (Before copy PROD to TEST), and 'Due Date' (Wed Jan 22 2020). There's an 'Assigned To' section with 'EDIT' and 'X Boggess, Thomas' options. At the bottom, there are 'Cancel' and 'Create' buttons.



The screenshot shows the task list. A blue arrow points from the 'Create "To Do" Task' button in the previous screenshot to the 'Contact Aryn re: Loc Security' task in the list.

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	Assign, 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	Complete, Ignore	Wed Jan 22 2020			Boggess, Thomas	You	


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"

The screenshot shows the search options. The 'Quick Search' toggle is turned off, and 'Advanced' is selected. Below the search bar, there's a 'Hint! Type :: to use SeriesQL.' and a 'Reset' button highlighted with a blue arrow.



## 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.



Select Object:  Events ▼ Your Starred Events ▼

Your Starred Events

Reset Search

List Calendar

← Future Only → Future Only All Dates Choose Columns ↻ ?

	Name	Title	Reference	Organizations	Type	Start Date <span>▼</span>	Start Time	Creation Date	State	Locations
	<a href="#">Boggess - ECON 4500 Office Hours</a>	Economics 4500 Office Hours - Tom Boggess 2755	2020-AACVVQ	<a href="#">Economics-AS</a>	Class Related	Tue Jan 28 2020	4:30 pm	Fri Jan 10 2020 12:45 pm	Confirmed	<a href="#">GSH144</a>
	<a href="#">Tom's first 25Live event</a>	Tom's first 25Live event - It's Happening!	2020-AACVTH	<a href="#">East Coast Asian American Stud-STDNT ORG</a>	Meeting / Info Session	Tue Feb 11 2020	7:00 pm	Wed Jan 01 2020 12:19 pm	Tentative	<a href="#">GSH142</a> <a href="#">RCK132</a>

## 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