

# 25LIVE USER QUICK REFERENCE MANUAL

## HOW TO LOG IN

You will start this process by logging into 25Live from the university website using Firefox, Chrome or Safari.

**Google Chrome is the best browser for this program.**

- Go to “Faculty/Staff”
- Go to “25Live Calendars”
  - Please do not use this calendar to check availability of locations.
    - Only shows CONFIRMED events, not tentative events in the system
    - Only shows the Event start and end time, not the entire reservation time
- Go to “Submit Request through 25Live Portal”
  - This will bring you to the login page
  - Go to “Sign in” in the upper right hand corner
  - Enter your Warrior credentials

## HOME PAGE

Three Different View Options:

1. **Dashboard**
  - Quick Searches for Events, Locations, Resources
  - Your Starred Locations
  - Find Available Locations
  - “Create an Event”
  - “Customize Dashboard”
2. **Calendar**
  - Won’t use much unless you build a search in 25Live
3. **Availability**
  - Public Searches
  - Your Starred Locations
  - This is the QUICKEST way to find an available location

## HOW TO FIND AN AVAILABLE LOCATION

1. **Location Tab**
  - “Search for Locations”
    - By name or keyword
    - “More Search Options”
      - Categories
      - Features
      - Layouts
      - Capacity
    - Can view all availability from here
    - Can “STAR” the location from here
    - “Save Search” from here
  - “Pre-Defined Location Searches”
    - Pre-Defined Groups (Your Starred Locations- very useful!)
    - Index (by name)
    - Categories
      - By Building
      - By Room Type

- By Campus
    - Features (equipment that is in the room)
    - Layouts
    - Capacities
    - By Searches
- “Advanced Location Search”

## HOW TO FIND DETAILED LOCATION INFORMATION

1. Details
  - a. Very useful information!
  - b. We are currently in the process of updating the information, so if you see anything that is incorrect or missing information, please send it to us at 25Live@csustan.edu.
2. List
  - a. Shows events in a certain date range as a list
  - b. What’s nice about this view is you can choose a very large date range
3. Availability (Daily)
  - a. Shows events in a certain date range day by day
  - b. Can choose the date range, again, can be very large
  - c. Can choose which days of the week you’d like it to show
4. Availability (Weekly)
  - a. Shows availability week by week, side by side
  - b. Choose the first week, then subsequent number of weeks you want to view after
  - c. Can choose which days of the week you’d like it to show
  - d. **If there is a room that you’d like to use that is MOSTLY available except on one or two days, you can still input ONE reservation. So, let’s say this room is available all of the weeks except for one, we can now go and search for another location for that one day.**
5. Calendar
  - a. Shows events happening in a calendar view
  - b. Not very useful when looking for location availability
6. You can make any one of these your “default view” by going to “Actions” > “Make this my default view when loading individual locations”

## HOW TO CREATE AN EVENT REQUEST

There are two ways to go to creating an event. Both of these options will bring you to the “Event Wizard” which is 25Live’s built-in event scheduling request form.

1. “Home” tab, “Dashboard” tab, click on the “Create an Event” button
2. Click on the “Event Wizard” tab

A few things to point out here:

- You will have a summary of the things you have entered on the LEFT, which are clickable
- On the RIGHT there will be “helps” that pop up when you click into a certain space

## “EDIT THE BASIC EVENT INFORMATION” PAGE

- Event Name
  - Be as specific as possible and don’t use acronyms if you don’t have to
  - If you do have to, please be sure to spell out the full title in the description
  - You will also notice if you misspell something, it will underline it in red, so please check for spelling errors
- Event Type
  - Select one of the “Event Type” options.

- This is the activity type that *best relates* to the event you are requesting.
- Important to choose the appropriate type for a few reasons
  - Used for auditing purposes on what events take place on campus and how our spaces are being utilized
  - Cannot be changed once your event is saved.
  - If you are unsure, feel free to ask our office, but please, please, please do NOT use meeting if it is not just a meeting. This is the event type that is misused the most and it really skews our auditing reports.
- The selected type will appear in the column on the right.
- Primary Organization
  - This is the CAMPUS organization that is primarily responsible for this event
  - No Off Campus organization can be listed here
- Additional Organization (if applicable)
  - This could be either a CAMPUS or 3<sup>rd</sup> PARTY organization
- Click “NEXT”

#### “EDIT ADDITIONAL BASIC EVENT INFORMATION” PAGE

- “Expected Head Count”
  - It is important for the head count to be accurate, since the system recommends rooms based on that number you input here.
- “Event Description”
  - This field is intended to capture details about your event.
  - Again, if you had to use an acronym in the title, please be sure to spell it out here
  - This information will be visible to the public on our campus calendar, so please use it as a marketing section to inform guests regarding your event.
  - You will also notice if you misspell something, it will underline it in red, so please check for spelling errors
- Click “NEXT”

#### “EDIT THE INITIAL DATE AND TIME” PAGE

- Enter the date and time for the FIRST occurrence of your event.
- The date and time are the time your EVENT STARTS and ENDS.
- It is important to keep the check box “The event begins and ends on the same day.”
- **This is the time that will be published and viewable on the web calendar, so it’s important to NOT build your setup and takedown time into this. Use the “Additional Time” to add setup and takedown**
- **Additional Time:** Please use this section to include the Setup and Takedown times.
  - Setup:
    - The time setup is to begin for this event.
    - This includes the time YOU need to set up for a meeting/event
    - Also includes the time FACILITIES needs to do a room setup
    - If you are unsure, please consult with Facilities Services on when they will conduct setup for this event and how long it will take.
  - Takedown
    - The time you will use to clean up your items
    - Also the time that Facilities Services will need to breakdown after the event.
    - Again, if you are unsure of the time needed, then you will need to submit a work order and request that information
    - Best Practice is to schedule 15 minutes after the projected end of your event to give you time if you run over and serves as a buffer before the next meeting.

- Schedulers/Approvers WILL be reviewing this information, but it is YOUR responsibility to ensure that it is input properly for the time needed. Again, it will save you time if you build this in initially because then we won't have to email you asking about it.
- To ensure your reservation time is input properly, please look to the right and find the buttons that state the "Event Duration" and "Reservation Duration". The "Event Duration" is how long the event will take place and the "Reservation Duration" is how long you have the location reserved. Once confirmed, click "NEXT"

Event Duration:  
**1 Hour, 30 Minutes**

Reservation Duration:  
**2 Hours, 30 Minutes**

### "ADD, REMOVE, OR EDIT REPEAT OCCURRENCES" PAGE

Select one of the "Event Repeat" options:

1. Does Not Repeat
  2. Ad Hoc Repeats (THIS IS THE BEST OPTION FOR ANY REPEATED EVENTS)
    - a. Event repeats on the dates you choose from the calendar
  3. Daily Repeats
    - a. Event repeats every day through the end date at the same time as the initial date
    - b. ONLY USE IF YOUR EVENT IS TRULY HAPPENING ON CONSECUTIVE DATES, OTHERWISE CHOOSE THE AD HOC REPEATS
  4. Weekly Repeats
    - a. Event repeats on the same day every week at the same time as the initial date
    - b. ONLY USE IF YOUR EVENT IS HAPPENING EVERY SINGLE WEEK, OTHERWISE CHOOSE THE AD HOC REPEATS
  5. Monthly Repeats
    - a. Event repeats on the same day/date every month at the same time as the initial date
    - b. ONLY USE IF YOUR EVENT IS REPEATING IN THE SAME PATTERN EVERY SINGLE MONTH, OTHERWISE CHOOSE THE AD HOC REPEATS
- All occurrence dates chosen will appear in the "Occurrence List" directly below this section.
  - It is possible to add notes to specific event dates in the "Comments" box.
  - You may also cancel individual occurrences by clicking on the status drop down menu for that day and changing the status from "Active" to "Cancelled" or clicking on the "x" next to the date if it shows.
  - Click "NEXT"

### "ADD, REMOVE, OR EDIT EVENT LOCATIONS" PAGE

By this time, you should already know what location you are going to use and at which times. All we should need to do is to enter the location name. If the location you are wanting is one of your starred locations, it will show up first, otherwise to go to "Search by Location Name". Please note that all locations have letters, a space, and then the numbers.

Once you find a location, a few things can occur:

 **No Permissions for this Location**

- A RED BRICK WALL: You have permission to view this location, but not to reserve it.

### Location has no Conflicts

- A GREEN CHECKMARK:
  - If a space is available on all of the dates you entered, a green checkmark will appear.
  - You can then select the space and click “NEXT”.

### Location has Conflicts

- A RED TRIANGLE:
  - If there is a conflict on any of the dates, a red triangle will appear.
  - You can hover the mouse cursor over the red triangle to view the dates with conflicts.
  - If you would like to use the room on the dates without conflicts, then select the room so that it shows up on the right hand side.
  - On the right, scroll down to the end of the location where it says “View and Modify Occurrences”.
  - Find all the dates with conflicts, and then uncheck the box under the “Assign” column. This will basically release that room from being reserved for this date for your reservation. Click “Save Changes”
  - Now, you can find a different room to use for the dates that you unselected. You either already know which room it is because you already did your homework, or we can go back to the “Locations” tab and search again. Don’t worry about it not saving your information, it will still hold it in the Event Wizard.
  - You can check to see which dates each of the rooms you have a reserved for by looking over to the event summary on the left.
  - Once you are certain you have a room assigned for every occurrence of your event, click “NEXT”.

### “ADD, REMOVE, OR EDIT EVENT RESOURCES” PAGE

- Currently unavailable for most campus locations except for the Quad, click “NEXT”

### “ADD OR REMOVE EVENT FILES” PAGE

- Include information such as a layout diagram, event flyer, etc. and then click “NEXT”

### “EDIT ADDITIONAL INFORMATION FOR THIS EVENT” PAGE

- Please fill in the boxes that appear here
- They are unique to every event type, so will vary depending on what you choose
- Please note the required fields marked by a red asterisk and then click “NEXT”

### “EDIT REQUIREMENTS FOR THIS EVENT” PAGE

- Specific service questions will show up on every reservation request.
  - Room Setup
    - Please list information here about the room setup and any assistance that you will need.
    - Please note that you will still need to submit a work order to Facilities Services.
  - Custodial Services
    - Please list information here about the cleaning you will need done either before, during, or after your event. This would include vacuuming, garbage removal, and cleaning and re-stocking any nearby restrooms.
    - If you have any food/beverages present at your event, this is required.
    - Please note that you will still need to submit a work order to Facilities Services.
  - Food/Beverage

- Please outline the types of food and beverage that you wish to serve at your event. Please note that Chartwells is our on campus food service provider and you will need to reach out to them separately if you plan on having your event catered by them.
- Alcoholic Beverages
  - The request to serve alcoholic beverages on campus will get forwarded to UPD
- Parking Lot
  - If you are requesting the use of a parking lot for your event and plan to either pay for the lot usage or request a parking fee waiver, please choose this box.
  - Your request will be forwarded to UPD where they will process and approve/deny.
- A/V Equipment
- Other Services
- Please select all that apply, or choose the “No Support is Needed” option and click “NEXT”

#### **“EDIT ADDITIONAL COMMENTS & NOTES FOR THIS EVENT” PAGE**

- Internal Notes that are not posted to the calendar, but will be visible to your approvers and other 25Live users within the system. Please list any other information pertaining to your event that would be helpful to the schedulers/location approvers and then click “SAVE”

#### **I AGREE\***

- **I acknowledge this event is filled out properly and is complete. I understand the event state will be Tentative until the appropriate scheduler confirms the event in which an email will be sent to the requester.**
  - You confirm that you have done your research and have filled out the information completely. This will assist with your event being approved QUICKLY because all the information is there that is needed.
  - If all the information is not there or if the information is not clear, you will be contacted by the approver/scheduler, which will delay the approval process
  - Just remember that we are here to help you have a successful event.

#### **CONFIRMATION**

- Once all of the approvals are completed and questions are answered, your scheduler will then change the status of your event to “Confirmed”.
- You will receive an automated email that states the event status has been changed to “Confirmed”.
- Your event request is now complete and you can move forward with invites!

#### **HOW TO EMAIL YOUR EVENT INFORMATION**

- If you want to email anyone regarding your event, the most efficient way is to do it through the 25Live System.
- “More Actions” > “Email Event Details” > Shows the requestor, scheduler, and a few other options. Click on the box next to the persons you would like to email.
- You can also email ANYONE ELSE in the “Additional Recipients” by just entering their email address. If you’re unsure of the address, but know they are a 25Live user, you can click on the blue hyperlinks and then search for specific contacts. You can also “Star” contacts so they show first.
- You can include an attached event summary by choosing the “Event Confirmation” button
- You can also attach any file from your computer
- ALWAYS click “Include event details in body of message” because it gives information about the time and location of the event, otherwise it just sends an email with the title.

## HOW TO REVIEW YOUR PENDING APPROVALS

- Before your event is confirmed, there will potentially be a few departments reviewing the information you input for this event along with the use of space you requested. This could include departments such as Event Services, Risk Management, University Police, and several others who are in charge of reviewing the use of space on campus.
- You can see who these people are by going back to “View Details” of your event.
- “Details” Tab lists a summary of your event and the information you entered
  - Please note the Reference Code. This is a unique code that can be used to easily pull up your event information
- “Task List” tab > View = “All Assigned Tasks” > Expand Selections you’d like to review

## HOW TO FIND YOUR EVENT AGAIN

- Events Tab > Search for Events> Can Enter the Reference Code or the Title
- Locations Tab > Search for the Location > View the Date you reserved it
- Home Tab > Dashboard > Your Upcoming Events

## HOW TO EDIT YOUR EVENT

- From your event page, click on “Edit this Event” near the top right, which will take you back to the Event Wizard to update the date, time, or location, details, etc.
- Remember, **you can update everything except for the Event Type**
- You are only able to make changes while the event is still “Tentative”
- Once the event is “Confirmed”, you are no longer able to edit the event. This is because all of the details have been confirmed by the approver/scheduler. If you are in need of making changes, you can contact your scheduler to change the status back to Tentative so you can make the appropriate changes or the scheduler can make the requested changes.

## HOW TO CANCEL YOUR EVENT

- A cancellation is only needed if your event is NOT happening any longer. If the date/time/location/details need to be changed, please “Edit this Event” instead of cancelling and creating an entirely new reservation.
- **CANCEL THE ENTIRE RESERVATION**
  - If you need to cancel your event all together, you will need to email your scheduler and request that the event be cancelled. The best way is to email through the 25Live system.
  - Please ALWAYS include the Reference Number on this request
- **CANCEL AN OCCURRENCE FOR A REPEATING EVENT**
  - From your event details page, go to > Edit this Event
  - In the Event Wizard, go to the “Add, Remove, or Edit Repeat Occurrences” page.
  - On the Occurrence List, there will either be an “x” next to the date, or just the status bar that says “Active”. You can either click the “x” to clear that date, or change the status to “Cancelled”
  - This will release all location requests for that date.

FOR ANY 25LIVE QUESTIONS OR COMMENTS, PLEASE CONTACT

**EVENT SERVICES & FACILITY RENTALS**

**209-667-3913**

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