



Creating an Event Using the 25Live Event Wizard



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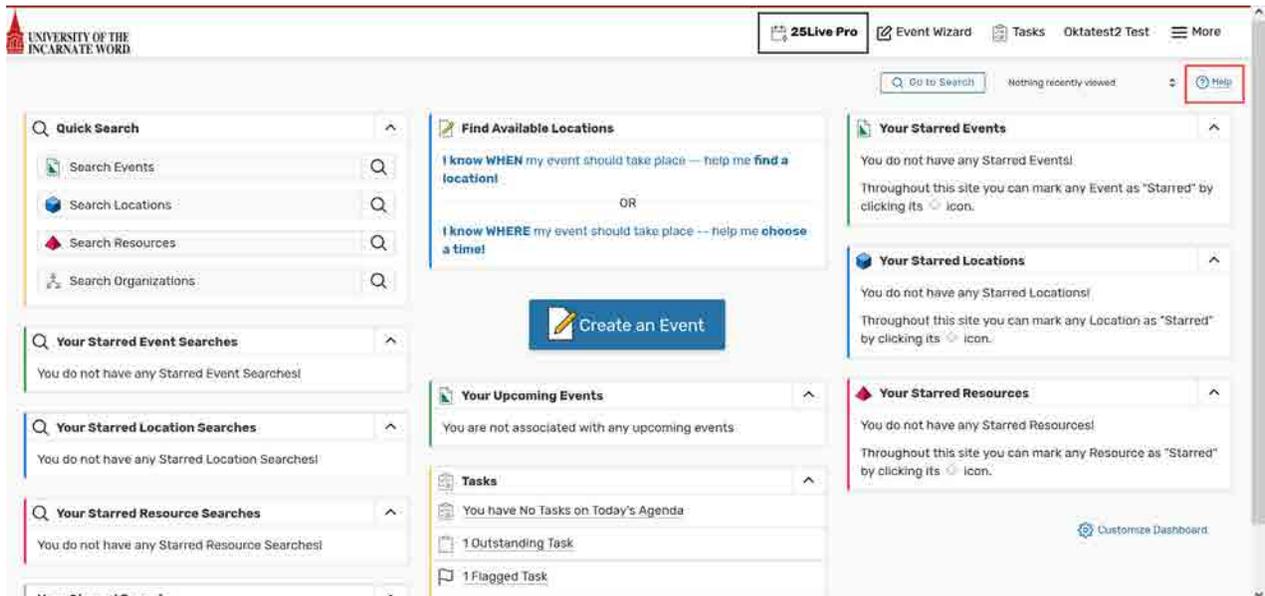
Overview

This is a training document shows users how to use the Event Wizard to create an event. To access the 25live system you must login via the CardinalApps single sign-on system.

Using the online help

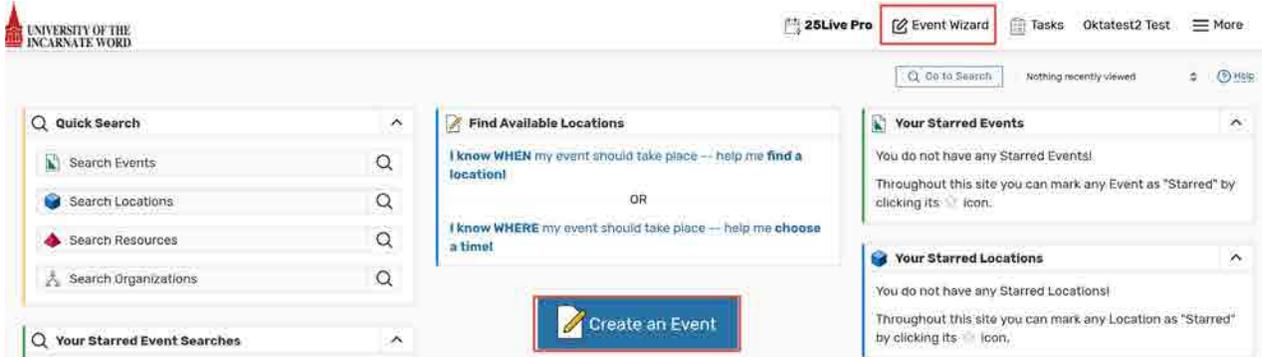
Keep in mind that you can always consult the online help if you have questions about what to do. Click the  general “Help” button in the upper right of the page to access all Help topics, or click the Help icon in the navigation bar  to access context-specific help for the current view or functional area.

Note: You must be signed into 25Live to access the online help.



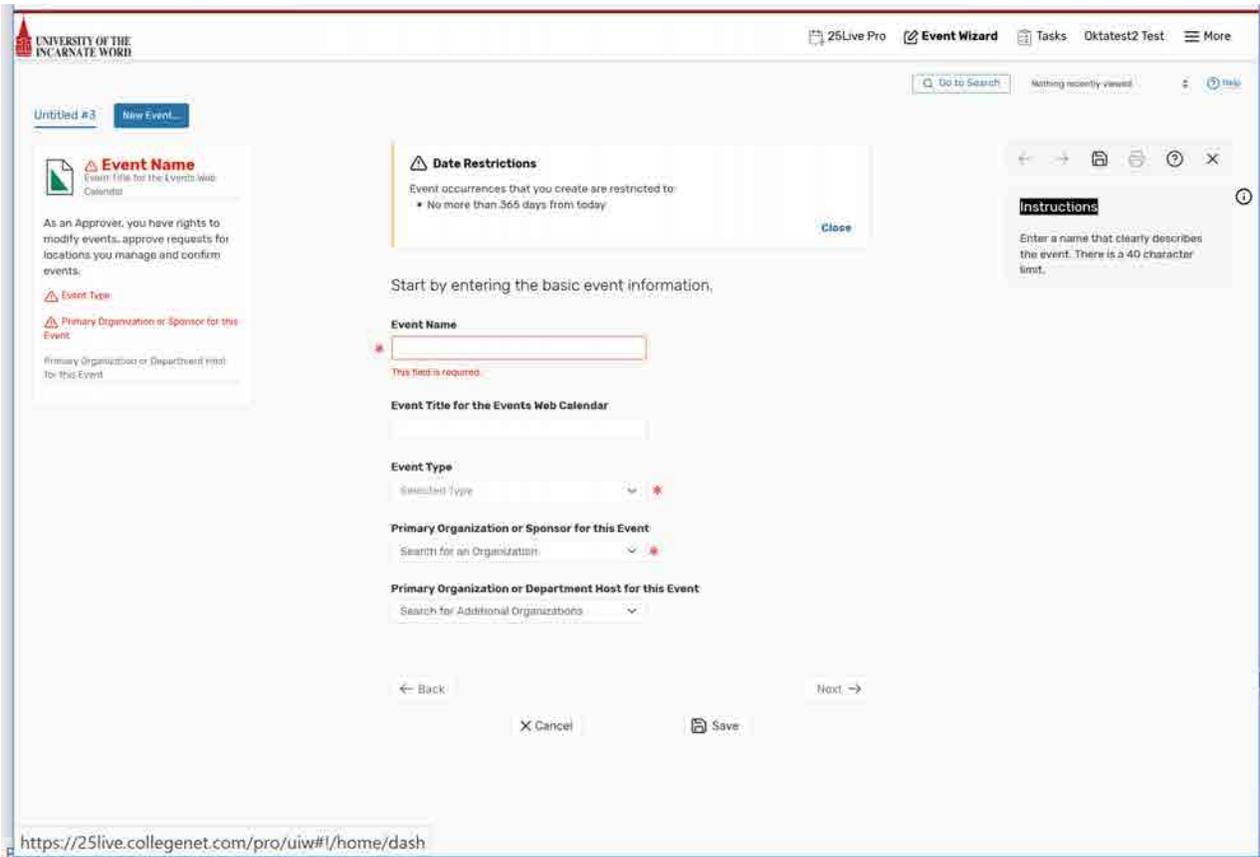
Opening the Event Wizard

To start creating an event, click the Event Wizard tab to open the wizard or click on Create an Event.



Entering basic information

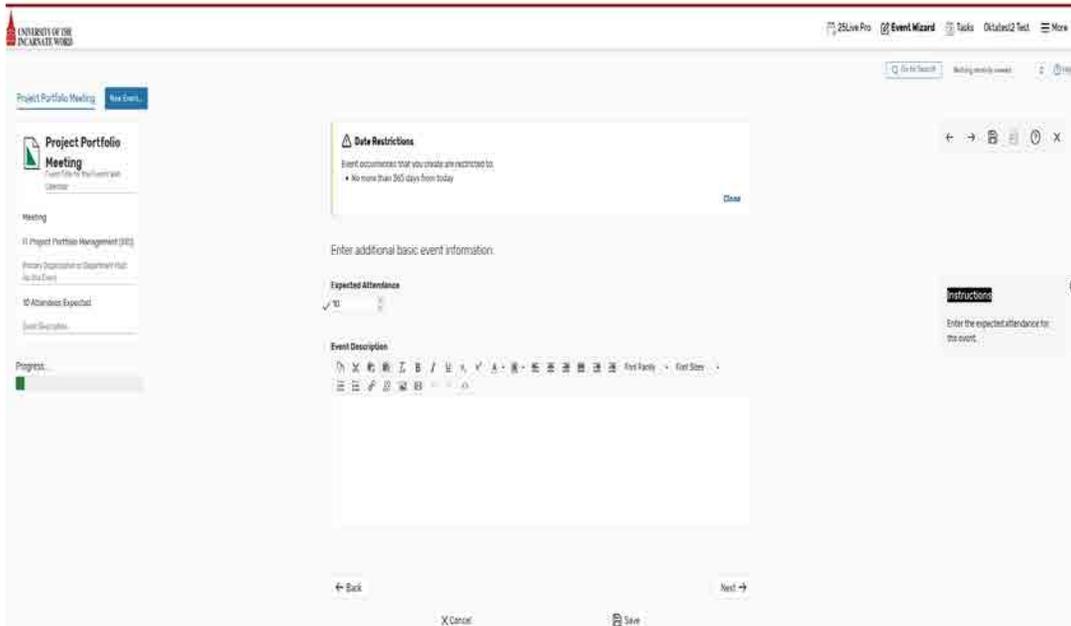
Enter an Event Name, and select an Event Type and Primary Organization. The Event Name is how the event will appear on web calendars (if set up in your 25Live Configuration) and in searches. Permissions determine which Event Types you can choose from.



Click "Next" to enter additional basic information.

Enter additional basic information

Enter the event’s expected head count, its registered head count if you know it, and event description. The Expected or Registered Head Count will be used by 25Live to find locations that can hold your event. The Event Description can appear on web calendars if you intend to publish your event.



Click “Next” to add event occurrence information.

Does the event repeat?

If the event has only one occurrence, select “No;” if it has more than one occurrence, select “Yes.”

 **Date Restrictions**

Event occurrences that you create are restricted to:

- No more than 365 days from today

[Close](#)

Is this a repeating event?

No

This event happens only once.
Any other related events are separate and distinct.

Yes

This event occurs multiple times.
It repeats daily, weekly, monthly, or irregularly (ad hoc).

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[X Cancel](#) [Save](#)

Click “Next” to set the event start/end date and time.

When is the first occurrence?

Specify the date and times of the first occurrence of the event. If your event occurs on multiple days, you'll describe how it repeats later. If your event has multiple occurrences that happen at different times, you'll need to create separate events for each time. You can then connect those events to each other later using Manage Related Events functionality.

If the event requires Setup/Pre-Event and/or Post-Event/Takedown time, select the option you need, then set the number of days, hours, or minutes needed.

⚠ Date Restrictions

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Tell us when this event takes place.

Select the dates and times of the **actual event**.

Event Start:

Sun Aug 25 2019 

4:00 pm

Event End:

Sun Aug 25 2019

5:00 pm

The event begins and ends on the **same day**.

Additional Time

Does this event require additional time before the event? Yes No

Does this event require additional time after the event? Yes No

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[✕ Cancel](#)
[📁 Save](#)

Click “Next” to set up multiple event occurrences, or if the event has only one occurrence click “Next” to select the event’s Location.

How does the event repeat?

If your event has more than one occurrence, select how the event repeats.

Click “Next” to set the event’s occurrence dates.

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Choose how this event repeats.

Ad Hoc Repeats

Individually select dates to add to the event.

Daily Repeats

Examples: Repeats every day for 5 occurrences; Repeats every 3rd day through a specific date.

Weekly Repeats

Examples: Repeats every week on Monday and Thursday for 12 occurrences; Repeats every other week through a specific date.

Monthly Repeats

Examples: Repeats every month on the 1st and 15th through a specific date; Repeats every 3rd Monday of the month for 6 occurrences.

Does Not Repeat

This event has only one occurrence.

Define the exact dates of the event

Use the repeat date controls to define the event’s repeating pattern or ad hoc dates. Once defined, you see the dates in the Occurrence List at the bottom of the page.

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Describe how this event repeats.

Monthly Repeats ▾

Repeats every ▾

Repeat by Day
[Add Repeat Day...](#)

Repeat by Position
[Add Repeat Position...](#)

Repeats through 📅

Ends after iterations

Occurrence List

Date	Comments	Status
Mon Aug 26 2019	<input type="text"/>	Active ▾
Thu Sep 26 2019	<input type="text"/>	Active ▾
Sat Oct 26 2019	<input type="text"/>	Active ▾

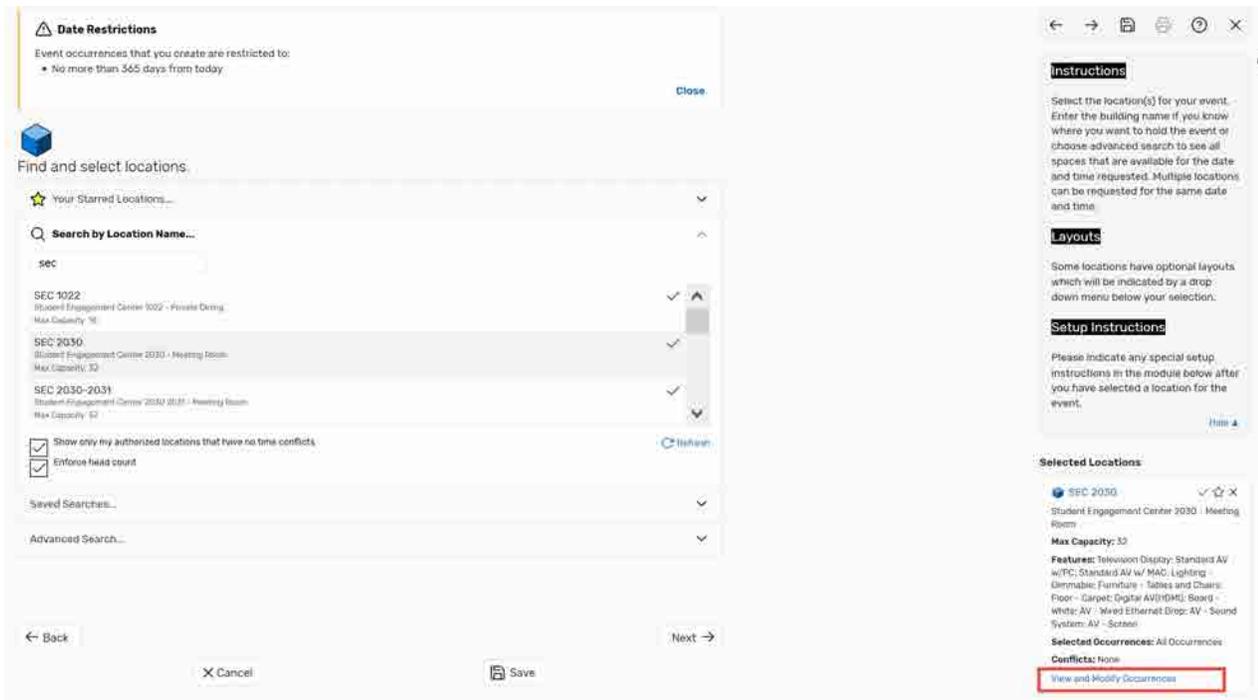
Click “Next” to select the event’s location(s).

Select location(s)

Select one or more favorite “starred” locations, or search for suitable locations by location name, saved search, or advanced search. Locations that best fit your head count will appear higher in the list. If you’ve searched, choose one or more available locations for your event.

A red triangle means the location is not available. A green check mark means the location is available. A green box with lines inside means the location is in use, but the event that is using it is willing to share the location.

If you need to un-assign a location for specific occurrences, choose a different layout, or add setup instructions, click “View and Modify Occurrences” on the right and perform the required task(s).



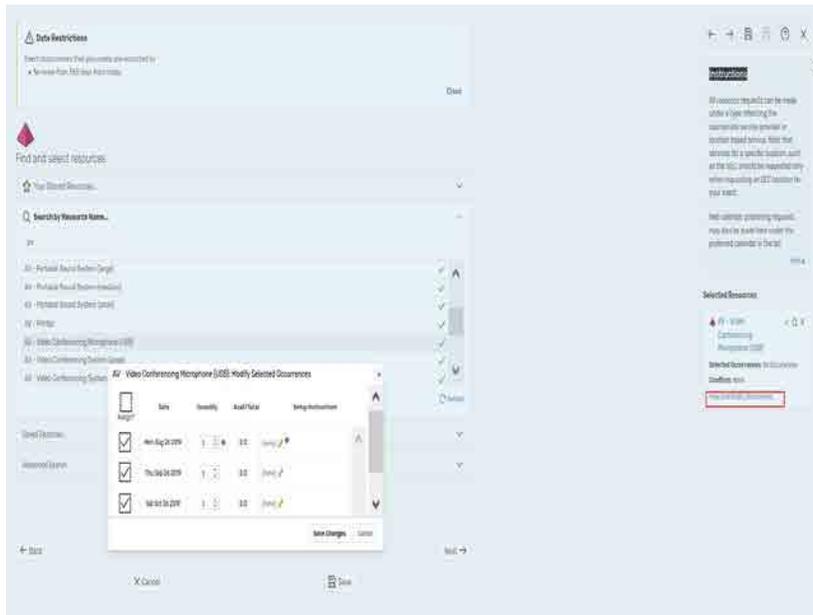
Click “Next” to select the event’s resource(s).

Select resource(s)

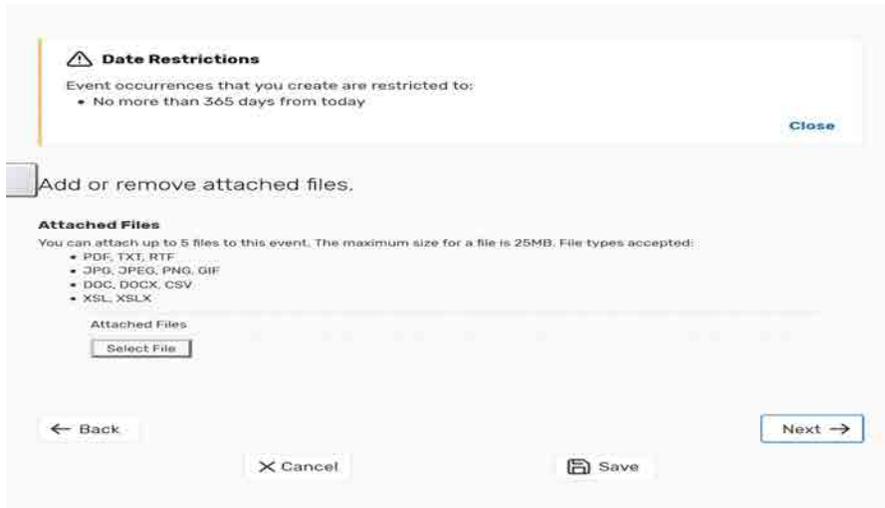
Select one or more favorite “starred” resources, or search for resources by resource name, saved search, or advanced search. If you’ve searched, choose one or more available resources for your event.

A red triangle means the resource is not available. A green check mark means the resource is available.

If you need to adjust the quantity of a resource needed for specific occurrences, un-assign a resource for specific occurrences, or add setup instructions, click “View and Modify Occurrences” on the right and perform the required task(s).



Click “Next” to add attachment(s), if needed.



Click “Next” to select the event’s custom attributes.

Enter custom attributes

Select and enter values for the custom attributes listed that are pertinent to your event. These custom attributes, such as ‘Cancel if Bad Weather’ and ‘Only UIW students & staff attending?’ are very important when creating events at UIW as they provide meaningful information to our community.

⚠ Date Restrictions

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[Close](#)

Select additional event information for this event.

Cancel if Bad Weather
 Yes No

Only UIW students & staff attending?
 Yes No

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[X Cancel](#) [Save](#)

Click “Next” to select the event’s contacts.

Select contacts

Select the contacts associated with the event. If you're not the primary contact for the event, you need to specify who is. To specify a contact, click the drop-down icon and enter a few letters of the contact's name, then select it when the full name displays. You can also add a name by selecting "Create New..." and then entering the contact's "Basic Information" and "Email" address.

The scheduler may be automatically assigned to your event depending on security; this might be the Location Scheduler for your selected location or the default scheduler for your security group.

⚠ Date Restrictions

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[Close](#)

Select contacts for this event.

Scheduler

Herrera, Jose ☆ ▼

 herreraj@uiwtx.edu

Requestor

Test, Oktatest2 ☆ ▼

 Oktatest2@uiwtx.edu

Additional Contact

Search for a Contact ▼



← Back
X Cancel
Save
Next →

Click "Next" to select the event's requirements.

Select requirements

If your event has overall requirements, such as a liquor license or a contract, select the pertinent requirements, and add comments or quantity information as needed.

⚠ Date Restrictions
Event occurrences that you create are restricted to:
• No more than 365 days from today Close

Select requirements for this event.

Click if this event is open to the general public.
Comments:

Click if you will be serving food at your event.
Comments:

Click if your event includes minors.
Comments:

Click if your event is being held outside normal business hours.
Comments:

Click if your event will require custodial services.
Comments:

Click “Next” to add any comments or notes for the event.

Add Comments and Notes

Enter appropriate comments and/or notes for the event.

- Event Comments can be seen by most users.

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Add additional comments and notes for this event.

Comments

Confirmation Notes *This information cannot be edited*

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✕ Cancel Save

Click “Next” to agree to event terms and conditions.

Agree to terms and conditions

Check the “I agree” box. You must agree to **YOUR SCHOOL’S** boilerplate terms and conditions before your event can be saved.

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[Close](#)

Affirmation

Your event will be routed to the appropriate approver(s). Until you receive an email advising it, your requested location has not been assigned.

You will receive a confirmation email as well as update emails after submitting your request with details to find it within 25live.

All requests must adhere to university policy.

* I agree

[← Back](#) [X Cancel](#) [Save](#)

Click "Save" to complete the event creation.

This event has been successfully saved, pending approval.

Here's Some Information About Your Event

Location Requests Pending Approval
Location 'SEC 2030' requested for Aug 26 2019.
Location 'SEC 2030' requested for Sep 26 2019.
Location 'SEC 2030' requested for Oct 26 2019.

Resource Requests Pending Approval
Resource 'AV - Video Conferencing Microphone (USB)' was requested for Aug 26 2019.
Resource 'AV - Video Conferencing Microphone (USB)' was requested for Sep 26 2019.
Resource 'AV - Video Conferencing Microphone (USB)' was requested for Oct 26 2019.

What's Next?

View Details	View the Event Details page for this event. The full range of actions are available to you from there.
Edit	Need to make some more edits to this event? Click this button to start editing.
Copy	Create a copy of this event with many event details duplicated. Go through each field of the new event to verify the details you want to retain and resolve any possible conflicts.
Email	Email the details of this event to its stakeholders or anyone else.

Event Preferences

The following locations were requested for this event:

SEC 2030
Remove Preferences

The following resources were requested for this event:

AV - Video Conferencing Microphone (USB)
Remove Preferences

Event Tasks

1 Active Notification Task
0 Active Assignment Tasks