



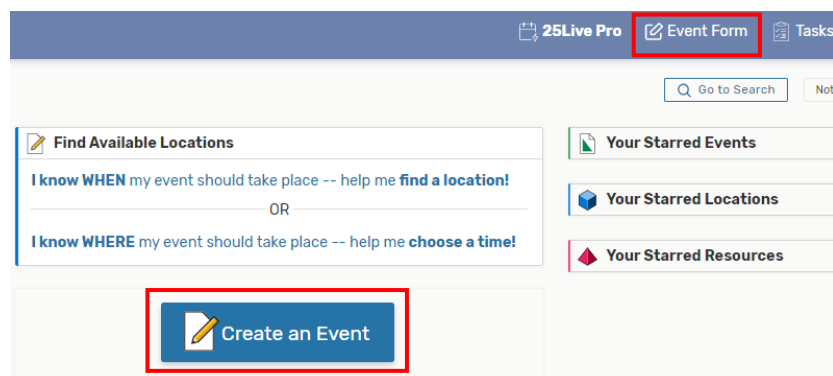
25Live Pro

Creating Reservations-The Event Form

All courses originate in the Banner System. 25Live Pro then pulls the courses into the calendars through a process called the Room Run. After the Room Run, any courses not placed will be manually assigned to a location through the Banner system by the Departmental Schedulers. Final Exams are placed during the fourth week of classes through another Room Run process. The scheduler should send the day/time of any Final Exam that didn't place to the Functional Administrator to be added to the course reservation in 25Live. Using the Event Form, any other event, meeting, rehearsal, performance, etc. can be placed into the 25Live Pro calendars per location availability and room classification after the first week of Spring and Fall classes have concluded. Summer reservations can be placed starting the first of February each year.

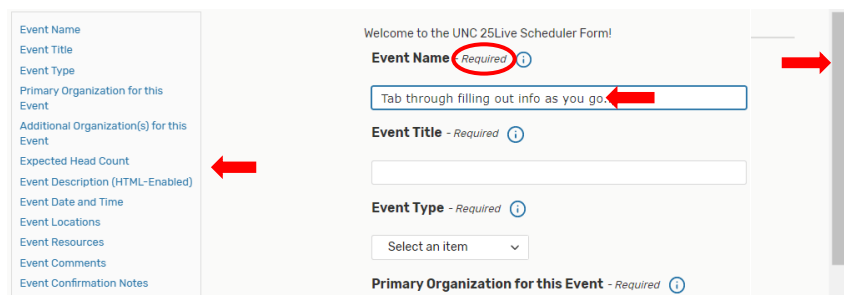
Launch the Event Form

The Event Form is the tool that will walk you through setting up your reservation. From your Dashboard, click on either "Create an Event" or "Event Form". Either selection will open the Event Form.



Note: the button in the middle of the page will not appear if Express Scheduling exists in your user group.

Navigate through the Event Form by scrolling down, using the tab key to move from one field to the next, or by using the blue links to the right that will go directly to a specific field in the form. Please note that the form will not save if any "Required Fields" have been missed.



TIP: Academic Schedulers should only be choosing an Event type that states the category is for "academics" in some way; i.e., Non-Banner Class, Meeting-(In an Academic Space), Presentation-(In an Academic Space), Special Academic event, etc...

Fill out the “Expected Head Count” field, and then move on to selecting when your event will occur. Even if your event is going to have a repeating pattern, you will always leave the check mark for the field “This event begins and ends on the same day”. Enter the first occurrence along with the time in the “Event Date and Time” section. **IMPORTANT:** This field should never show the start and end of the event on two separate days. If this is done improperly, the event will not track to the calendar correctly and the resources may not get applied as intended. This field sets the start day and time only.

Expected Head Count *Required*

Event Description (HTML-Enabled) ⓘ

File ▾ Insert ▾ View ▾ Format ▾ Tools ▾

↶ ↷ **B** *I* U A ▾ **A** ▾ Font Family ▾ Font Sizes ▾ 🔗

Event Date and Time - *Required*

Tue Oct 01 2019

8:00 am

To:

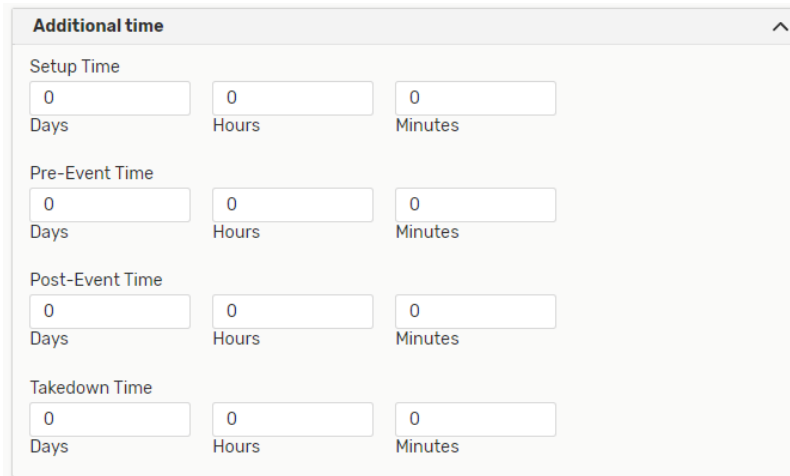
9:00 am

→ This event begins and ends on the same day

If needed, click on the down arrow on the “Additional time” bar and then fill out that section accordingly to add Setup, Pre-Event, Post-Event, or Takedown Time to the reservation.

Additional time ▾ →

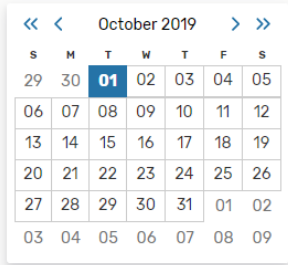
These are not required fields. They only need accessed when additional time needs added to an event.



This next section is where you choose how the repeating pattern will behave; whether it will repeat daily, weekly, monthly, or by picking individual dates for the event to repeat through the Ad Hoc Repeats option:

Click on the calendar below to add dates to your event or click the button below to select a date pattern for your event.

Repeating Pattern



View All Occurrences

Pattern Picker

Choose how you would like this to repeat: Weekly

Repeats every: week

Repeats on: Sun Mon Tue Wed Thu Fri Sat

* Repeats through: Fri Sep 25 2020

Ends after: 1 iterations

Cancel Select Pattern

Pick a repeating pattern by clicking on the blue “Repeating Pattern” button as circled above, and then choose how you would like the reservation to repeat. You will then need to provide the days and times as prompted by that screen’s required information as illustrated on the next page.

TIP: For reservations that require the event to occur in different locations at different times on the same day; after you have chosen the required meeting patterns, please click on the actual date block in the calendar for that day. So, in the example above, you would click on the highlighted day of October 01 in that calendar. A window will then open allowing the addition of another occurrence. Set the time of the new occurrence then close that pop-up screen. Then when you get to the step where you view all occurrences of the location, you will remove or leave the checkmarks in the “Included” column for the days the event will occur or not occur in that location:

Date	Time	Conflicts	Included	Shared	Instructions	Attendance
------	------	-----------	----------	--------	--------------	------------

Ad Hoc:

Pattern Picker ×

How does this event repeat? Ad hoc

Repeating Pattern

<< < September 2019 > >>

S	M	T	W	T	F	S
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	01	02	03	04	05
06	07	08	09	10	11	12

Daily:

Pattern Picker ×

How does this event repeat? Daily

Repeats every day

* Repeats through Mon Sep 30 2019

Ends after 1 iterations

Weekly:

Pattern Picker ×

How does this event repeat? Weekly

Repeats every week

Repeats on Sun Mon Tue Wed Thu Fri Sat

* Repeats through Wed Oct 02 2019

Ends after 1 iterations

Monthly:

Pattern Picker ×

How does this event repeat? Monthly

Repeats every month

* Repeat by Day

Repeat by Position

* Repeats through Wed Sep 25 2019

Ends after 1 iterations

In this more specific example, the event is going to meet every Friday for three weeks. We could pick the Ad Hoc option and choose the three Fridays, or we can choose the Weekly Repeats as this example shows. Pick the day(s) of the week the event is to occur, and then plug in an end date in the “repeats through” field.

Pattern Picker X

Choose how you would like this to repeat: Weekly

Repeats every: week

Repeats on: Sun Mon Tue Wed Thu Fri Sat

Repeats through: Fri Sep 25 2020

Ends after: 1 iterations

Cancel Select Pattern

After filling out the meeting pattern, click on “View All Occurrences”.

Repeating Pattern

<< < September 2020 > >>

S	M	T	W	T	F	S
30	31	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	01	02	03
04	05	06	07	08	09	10

View All Occurrences

This is where it is possible to edit the times for different meeting patterns.

All Date Occurrences

Dates	Times	Comment	State
Fri Sep 11 2020	9:00 am - 10:00 am		Active
Fri Sep 18 2020	9:00 am - 10:00 am		Active
Fri Sep 25 2020	9:00 am - 10:00 am		Active

In this example below, September 11th and 25th had the times changed, whereas the 18th has the original time:

All Date Occurrences

Dates	Times	Comment	State
Fri Sep 11 2020	10:00 am - 11:00 am		Active
Fri Sep 18 2020	9:00 am - 10:00 am		Active
Fri Sep 25 2020	10:00 am - 11:00 am		Active

Now that the meeting pattern has been established, it is time to search for available spaces to place the event. The “Event Locations” section allows you to choose a room for your event. If you have starred locations that you place events in regularly, it would be beneficial to turn the “Auto-Load Starred” to “Yes” as shown circled below. You should only have to toggle that to “Yes” once so that every other entry into the Event Form will open with the starred locations already loaded.

The screenshot shows the 'Event Locations' section with an information icon. Below it is the 'Locations Search' section. The 'Auto-Load Starred' toggle is currently set to 'Yes', which is circled in red.

To see available locations without conflicts, check mark that option. Same for the capacity of the room. If you only want to see rooms that will accommodate the size of your meeting or event, click on “Enforce Headcount”.

The screenshot shows the 'Event Locations' section with an information icon. Below it is the 'Locations Search' section. The 'Auto-Load Starred' toggle is set to 'Yes'. Below that, the 'Hide Conflicts' and 'Enforce Headcount' checkboxes are both checked and circled in red.

As with much of 25Live there are multiple ways to perform the same search. If you are looking for a room that you have previously starred, simply use the drop down in the first bar and choose the desired room.

The screenshot shows the 'Locations Search' section. The 'Auto-Load Starred' toggle is set to 'Yes'. Below that, the 'Hide Conflicts' and 'Enforce Headcount' checkboxes are checked. A dropdown menu is open for 'Your Starred Locations', showing a search bar and a list of starred locations: 'Your Starred Locations', 'Access Card Rooms', 'All Academic Spaces', 'Arts Annex', and 'Butler'. A red arrow points to the dropdown arrow.

If searching for a room that is not a Starred Location, click on “Reset” located next to the blue “Search” box or click on the “x” in the second field. The Search Locations field will open so you can type in that box.

Locations Search

Auto-Load Starred: No Yes

Hide Conflicts Enforce Headcount

Saved Searches (optional) Search Locations

More Options

If you want to reserve a specific location, type it into the “Search Locations” field. In the example below, CAND 0025 has been chosen. You can see that this room has a capacity of 40 individuals and that there are no conflicts in this room for the three days designated earlier in the Event Form.

It is very important that you now click on the “Reserve” button to select this room.

Locations Search

Auto-Load Starred: No Yes

Hide Conflicts Enforce Headcount

Saved Searches (optional) cand 0025

Hint! Type :: to use SeriesQL

More Options

Add	Name	Title	Capacity	Availability	Conflict Details
<input type="button" value="Reserve"/>	CAND 0025	CAND 0025 - S25- High Tech Observational	40	3/3	None

After selecting “Reserve”, the “Add” column changes to let you know the room has been “Added below”, and the room selection now appears in a box under the “Locations Search” box.

Locations Search

Auto-Load Starred: No Yes

Hide Conflicts Enforce Headcount

Saved Searches (optional) cand 0025

Hint! Type :: to use SeriesQL

More Options

Add	Name	Title	Capacity	Availability	Conflict Details
Added below	CAND 0025	CAND 0025 - S25- High Tech Observational	40	3/3	None

CAND 0025 CAND 0025 -S25- High Tech Observational Capacity: 40

CAND 0025 has now been chosen for all three occurrences, but let’s say that the requestor would like one of the meeting days in a location other than CAND 0025. We don’t need to make a whole new reservation; we can just add another room and designate which days go in which room. Let’s do a search for other rooms in Candelaria.

Go back to the text box and type in CAND, and then click on “Search” box. Scroll through the rooms to find a location that works with the parameters of your reservation. If you click on “Conflict Details”, a small screen will populate to let you know what day and time has the conflict and the name of the conflicting event.

The 'Locations Search' window shows a search for 'cand'. The table below lists several rooms:

Availability	Room ID	Room Name	Capacity	Usage	Action
Reserve Available	CAND 0345	CAND 0345 - Restricted-NonS25-PC Lab-(HSS Approval Needed #2706)	30	2/3	Conflict Details
Reserve	CAND 0375	CAND 0375 - S25- High Tech Observational	30	3/3	None
Reserve	CAND 0395	CAND 0395 - S25-General Classroom/Hig h Tech	31	3/3	None
Reserve Available	CAND 1025	CAND 1025 - S25- High Tech Observational	35	2/3	Conflict Details
Unavailable	CAND 1045	CAND 1045 - S25- High Tech	36	0/3	Conflict Details

The 'Conflicts' window shows a conflict on Fri Sep 18 2020 for CAND 0345, with event ID ECON 452 002 15397, occurring from 9:05 am to 9:55 am.

For this example, let’s reserve CAND 0375. Remember to click on the “Reserve” button to select the chosen room. The “Add” column changes to let you know the room has been “Added below”, and the room selection now appears in a box under the “Locations Search” box with the other room already chosen.

The 'Locations Search' table shows 'CAND 0395' as 'Added below'. Below the table, a list of selected rooms is shown:

- CAND 0025 CAND 0025 -S25- High Tech Observational Capacity: 40
- CAND 0395 CAND 0395 -S25-General Classroom/High Tech Capacity: 31

If the intent was to have this event meet in two locations, we would move on to the next part of the Event Form; however, we want to split this event so it meets in one room for two of the meeting days and times and in a different room for the other meeting day and time. We can edit which room goes with which occurrence by clicking on the “View Occurrences” button from the boxes of the rooms we have selected.

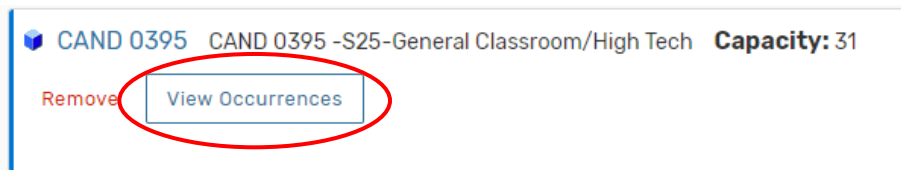
The 'View Occurrences' button for the selected room 'CAND 0025' is circled in red.

After clicking on “View Occurrences”, an editing window will display. Take the checkmarks out of the “Included” column for any occurrences that will not take place in that room. For this example, the event will be placed in CAND 0025 on the 18th only, so we will remove the checkmarks from the 11th and 25th occurrences.

CAND 0025

Date	Time	Conflicts	Included	Shared	Layout	Instructions
Set For All			<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Fri Sep 11 2020	10:00 am - 11:00 am		<input type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (40)	<input type="text"/>
Fri Sep 18 2020	9:00 am - 10:00 am		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (40)	<input type="text"/>
Fri Sep 25 2020	10:00 am - 11:00 am		<input type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (40)	<input type="text"/>

Close that window when done making edits. Now click on “View Occurrences” of the other room.



The event will be held in this room on September 11th and 25th, so those checkmarks will remain. The checkmark for the 18th will be removed from the “Include” column because we don’t want the event in this room on that day. When done click the “Close” button. You are now ready to move on to the next section in the Event Form.

CAND 0395

Date	Time	Conflicts	Included	Shared	Layout	Instructions	Attendance
Set For All			<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fri Sep 11 2020	10:00 am - 11:00 am		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (31)	<input type="text"/>	<input type="text"/>
Fri Sep 18 2020	9:00 am - 10:00 am		<input type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (31)	<input type="text"/>	<input type="text"/>
Fri Sep 25 2020	10:00 am - 11:00 am		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Classroom Regular (31)	<input type="text"/>	<input type="text"/>

Just a quick side note: Had the location search required more specific criteria, we also could have clicked on the “More Options” drop down and added the necessary additional criteria to a general search.

An example of this would be if we were looking for a High-Tech Classroom with Tables and Chairs in the Kepner building, we would enter that from “Categories” and “Features”. Then type in the four-letter code for Kepner

and hit search. Note that selecting “Matching Any” will produce results with rooms that have either criterion, as selecting “Matching All” will find rooms that only match all the intended criteria.

That search netted 2 matching locations, but because we marked to hide rooms with conflicts and to enforce the headcount, the display only shows the one room that is available with the data we requested. In the absence of those two checked boxes the results would have shown both locations with conflict information as shown here:

Add	Name	Title	Capacity	Availability	Conflict Details
Unavailable	KEPN 0040	Kepner 0040-S25-High Tech Observational(Coors Presentation Rm)	46	0/1	Conflict Details
Reserve	KEPN 1045	KEPN 1045-S25-High Tech Observational	29	1/1	None

Conflicts

Conflicts on: Tue Oct 01 2019

- KEPN 0040 Beta Alpha Psi Meeting starting at 5:00 pm and ending at 7:00 pm

Again, if a scheduling conflict existed, that information would be displayed under “Conflict Details”. By clicking on the blue link, the conflict information would populate.

Of course, just as in the previous example, by clicking on the “Reserve” button of the available room, that room would show below the “Locations Search” box in a new box, and you would be able to move on in the Event Form to assigning resources.

TIP: All locations are coded as either an S25 or Non-S25 facility. S25 locations are primarily for academic use and can only be reserved for meetings/events after the first week of classes has concluded. Non-S25 spaces need Departmental approval. Reservations Can Be Entered for Non-S25 “Restricted” rooms but will need “Assigned” to the room through the Departmental Scheduler’s tasks.

Moving forward with the original example that has three event days and two different rooms, we are ready to assign this reservation any necessary resources. As with locations, you can plug in an exact resource, pick a resource from your starred resources, or you can browse for a resource by putting in the first few letters and then hitting “Search” on that page. For S25 Facilities, always select the resources of “Notification Facilities” and “Unlock/Lock” Facility-By FM”. This will ensure the classroom gets unlocked for the event and that the HVAC System gets activated. Select any resources necessary. The selected resource(s) will show underneath the Resources Search box in same fashion as the locations did in that section.

Event Resources

Resources Search

Your Starred Resources ✕

Reset **Search**

Add	Name	Stock Total	Availability	Conflict Details
Reserve	Lawn - Sprinklers Turned Off	Unlimited	1/1	None
Reserve	Notification Facilities	Unlimited	1/1	None
Reserve	Unlock/Lock Facility - By FM	Unlimited	1/1	None

→ Notification Facilities
★ Remove from favorites
Remove View Occurrences

→ Unlock/Lock Facility - By FM
★ Remove from favorites
Remove View Occurrences

After the required resources are entered, move forward in the Event Form to filling out the Contact Roles. Your information will populate in the “Scheduler” field and should remain that way. The “Requestor” field can remain the same or the actual requestor’s name can be selected. There is a later field that allows for comments if you want to elaborate on the Requestor’s information there.

Contact Roles for this Event ⓘ

Requestor Scheduler **Create**

The next field will be to select the requirements for the event. "Requirements (Other)" will populate only if they apply to your event, and these categories are usually only needed by Conference & Event Services.

→ Requirements (Other) ⓘ

- Catering Notification
Comment
- Deposit Required
Comment
- Needs an Invoice
Comment
- Parking - Pull
Comment
- Parking Barricades
Comment
Quantity Max: Unlimited
- Parking Passes Required
Comment
Quantity Max: Unlimited
- Performance Hall Bar Requested
Comment
- Piano Tuning
Comment
Quantity Max: Unlimited
- Retail Catering Requested
Comment
- Security-UNC Police
Comment
Quantity

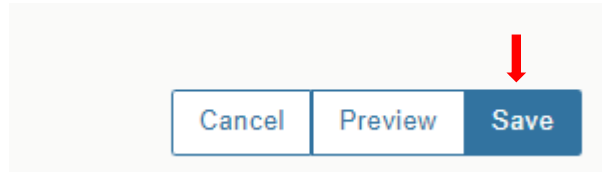
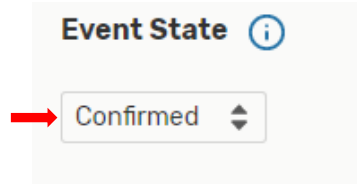
Add any pertinent comments on these next screens.

Event Comments ⓘ

Event Confirmation Notes ⓘ

Internal Notes ⓘ

You are now ready to Confirm and click on Save.



You should always review your reservation to make sure it appears as you intended. The information will appear under the “Details” tab whereas the date, time, and placement will show under the “Occurrences” tab. Always check the “Occurrences” tab so you can see at a glance if anything was missed or not saved properly.

Here is where you can see the day(s), time(s), room(s), and assigned resources (if any).

Date	Start Time	End Time	Additional Details
Fri Sep 11 2020	10:00 am	11:00 am	CAND 0395 (2 resources)
Fri Sep 18 2020	9:00 am	10:00 am	CAND 0025 (2 resources)
Fri Sep 25 2020	10:00 am	11:00 am	CAND 0395 (2 resources)

If the Additional Details column is missing the room information or any needed resources, you will have to edit your reservation, and add those missing items.

TIP: If you have selected a Non-S25 “Restricted” room for your event, your reservation will show as “is awaiting approval” until it is assigned to the room by the Departmental Approver. When approved, the “is awaiting approval” disappears and the room remains. If the request is denied, the room will disappear from the reservation, and you will need to choose another location for your event. The Departmental Approver should reach out to you if they deny your request.