



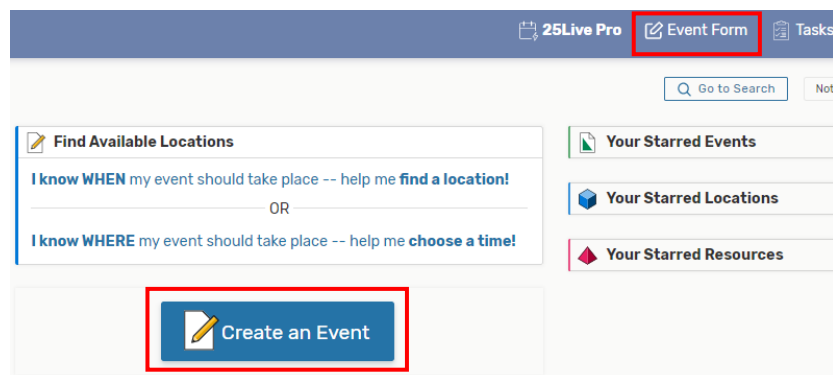
Creating Reservations-The Event Form

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 third week of classes through another Room Run process. The scheduler should send the day/time/location of any Final Exam in need of placement to the Functional Administrator to be added to the course reservation already in 25Live.

The Event Form is used to enter all other meetings, events, rehearsals, performances, etc. that need to 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 meeting/event reservations can be placed starting the first of February each year.

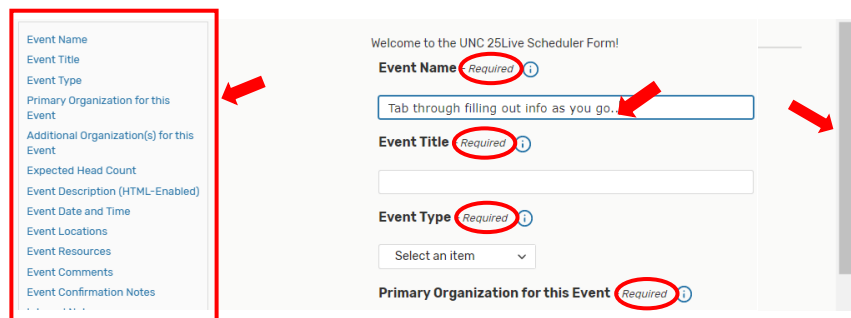
Launch the Event Form

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 scroll bar, by 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 be saved 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 be applied as intended. This field sets the start day and time only. Any repeating pattern is set in the upcoming steps.

Expected Head Count *Required*

Event Description (HTML-Enabled) ⓘ Note that this field is not required, so can be left blank.

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:

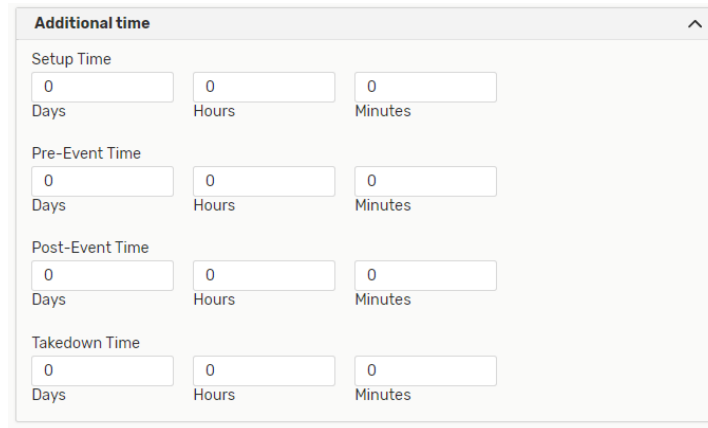
9:00 am

→ 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 ▾ →

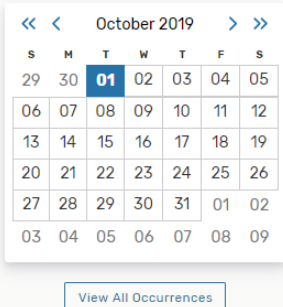
Additional times are not required fields, so only need to be accessed when additional time needs added to an event. Additional time allows the room to be reserved without it becoming part of the public reservation time.



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

Pick a repeating pattern by clicking on the blue “Repeating Pattern” button as circled above, and then pick the days and times from the chosen meeting pattern as prompted by that screen’s required information as illustrated on the next page.

TIP: For reservations that require the event to occur 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
------	------	-----------	-----------------	--------	--------------	------------

Choose the appropriate repeating “pattern picker” and then fill out the associated fields:

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

TIP: It's always best to pick a “Repeats through” date instead of using the “Ends after (x) iterations. Please try to keep reservations within the current semester, and never to exceed the following semester. (NonS25 spaces have some exceptions to that general rule).

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 ×

Choose how you would like this to repeat Weekly

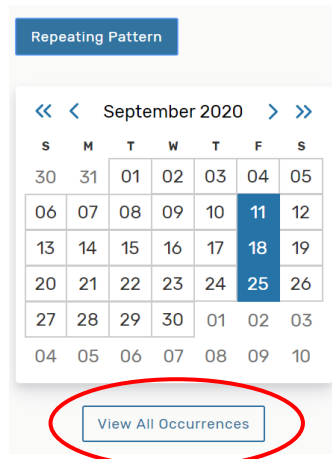
Repeats every week

Repeats on Sun Mon Tue Wed Thu Fri Sat

Repeats through
Fri Sep 25 2020

Ends after 1 iterations

After filling out the meeting pattern and clicking “Select Pattern”, click on “View All Occurrences”.



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

All Date Occurrences

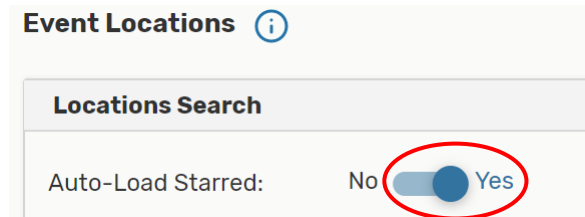
Dates	Times	Comment	State
Fri Sep 11 2020	9:00 am 10:00 am		Active
Fri Sep 18 2020	9:00 am 10:00 am		Active
Fri Sep 25 2020	9:00 am 10:00 am		Active

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

All Date Occurrences

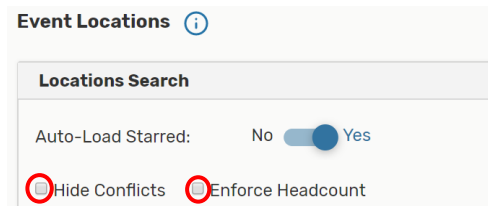
Dates	Times	Comment	State
Fri Sep 11 2020	10:00 am 11:00 am		Active
Fri Sep 18 2020	9:00 am 10:00 am		Active
Fri Sep 25 2020	10:00 am 11:00 am		Active

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 to choose from.



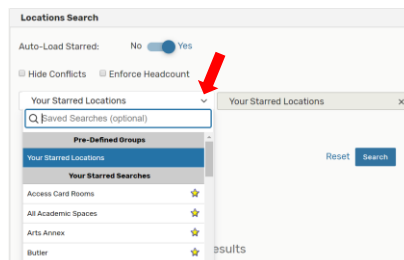
The screenshot shows the 'Event Locations' header with an information icon. Below it is the 'Locations Search' section. The 'Auto-Load Starred' toggle is currently set to 'Yes', which is circled in red.

To see available locations without conflicts, check mark “Hide Conflicts”. To show only the rooms that can accommodate the size of your meeting or event, click on “Enforce Headcount”.



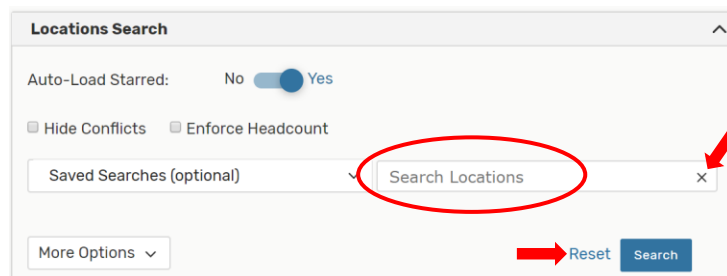
The screenshot shows the 'Event Locations' header and the 'Locations Search' section. The 'Auto-Load Starred' toggle is set to 'Yes'. Below it, the 'Hide Conflicts' and 'Enforce Headcount' checkboxes are both checked and circled in red.

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



The screenshot shows the 'Locations Search' form. The 'Auto-Load Starred' toggle is set to 'Yes'. The 'Hide Conflicts' and 'Enforce Headcount' checkboxes are checked. A dropdown menu is open for 'Your Starred Locations', showing 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.



The screenshot shows the 'Locations Search' form. The 'Auto-Load Starred' toggle is set to 'Yes'. The 'Hide Conflicts' and 'Enforce Headcount' checkboxes are checked. The 'Search Locations' field is open, and the 'Reset' button is circled in red. A red arrow points to the 'Reset' button.

If you want to reserve a specific location, type it into the “Search Locations” field. Keep in mind that the academic spaces are in the system with four letters for the building followed by a space and then four numbers for the room. You can search by only the building if you wish. Here is a list of the academic building codes:

Academic Building codes:
ARTS =Arts Annex
BTLR =Butler Hancock
BNCC =Ben Nighthorse CC
CAND =Candelaria
CRAB =Crabbe Hall
FRAS =Fraiser
GRAY =Gray Hall
GUGG =Guggenheim
GUNT =Gunter
KEPN =Kepner
MCKE =McKee
MICH =Michener
ROSS =Ross Hall

Keep in mind that if the building has a lower level, then the four-digit room code will have an “L” before the four room numbers. An example of this would be MICH L0074 or MCKE L0151.

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)

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.

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

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. The search results will vary depending upon if the "Hide Conflicts" and/or "Enforce Headcount" (located at the top of the Location Search section) have been selected. If "Hide Conflicts" is not selected, clicking on "Conflict Details" will populate a pop-up screen to let you know what day and time has the conflict and the name of the conflicting event.

The screenshot shows the 'Locations Search' interface with a search for 'cand'. The table lists several rooms with their respective capacities and conflict statuses. A red circle highlights the 'Conflict Details' link for CAND 1025. A red arrow points from this link to a 'Conflicts' pop-up window. The pop-up window displays the following information:

Conflicts on:
 ⚠️ Fri Sep 18 2020 • CAND 0345
 ECON 452 002 15397
 9:05 am - 9:55 am

Room Status	Room ID	Room Name	Capacity	Headcount	Conflict Status
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/High 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

For this example, let's reserve the S25 designated room of 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 screenshot shows the reservation interface with the following details:

- Added below:** CAND 0395 (Capacity: 31) and CAND 1025 (Capacity: 35).
- Selected Rooms:**
 - CAND 0025 - S25- High Tech Observational (Capacity: 40)
 - CAND 0395 - S25-General Classroom/High Tech (Capacity: 31)

Red arrows point to the 'Added below' status and the 'View Occurrences' button for CAND 0395.

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 that 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.

CAND 0025 CAND 0025 -S25- High Tech Observational **Capacity: 40**
Remove View Occurrences

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.

CAND 0395 CAND 0395 -S25-General Classroom/High Tech **Capacity: 31**
Remove View Occurrences

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.

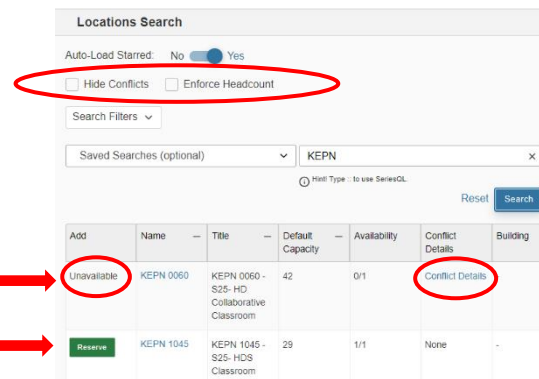
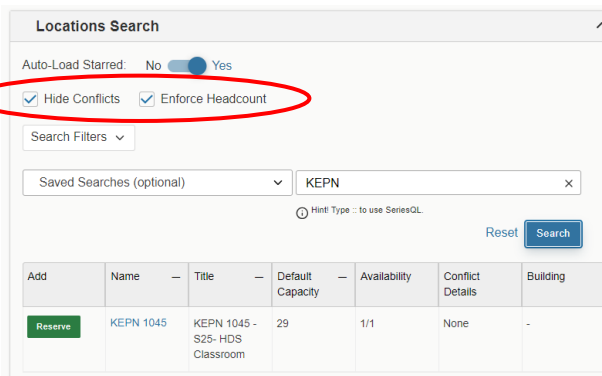
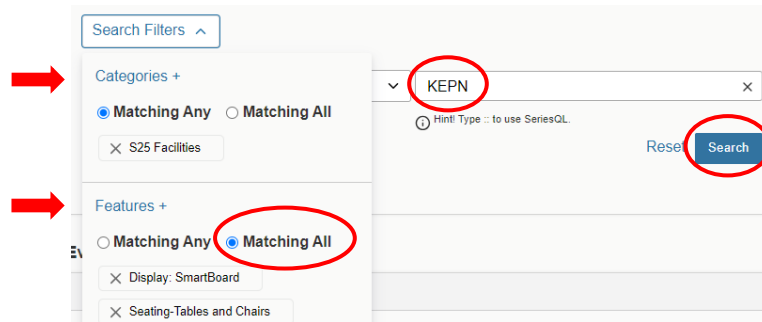
CAND 0395 ×

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"/>

Close

Just a quick side note: Had the location search required more specific criteria, we could have also clicked on the “Search Filters” drop down and added the necessary additional criteria from categories and or features.

An example of this would be if we were looking for an S25 space with table and chair seating that also has a Smartboard Display in the Kepner building. We would enter those criteria from “Categories” and “Features” and 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 feature criteria but selecting “Matching All” will find rooms that match all the intended feature criteria. In this example, that would be both a Smartboard and table & chair seating.



That search netted 2 matching locations (as shown above in the second box to the right and below), but had we marked the “Hide Conflicts” box and “Enforce Headcount”, the display would have only shown the one room that is available with the data we requested (as shown in the first box above on the left).

Add	Name	Title	Default Capacity	Availability	Conflict Details
Unavailable	KEPN 0060	KEPN 0060 - S25- HD Collaborative Classroom	42	0/1	Conflict Details
Reserve	KEPN 1045	KEPN 1045 - S25- HDS Classroom	29	1/1	None

Conflicts

Conflicts on:

Mon Apr 22 2024 • KEPN 0060

HUSR 399 001 22344

202430

12:20 pm - 1:10 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 selected 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 assign necessary resources.

★ **Important TIP: All locations are coded with either an S25 or NonS25 designation. S25 locations are primarily for academic use and can only be reserved for meetings or events after the first week of classes have concluded. NonS25 spaces are Department specific, so need Departmental approval to schedule. The exception: Reservations can be entered for NonS25- “Restricted” rooms but will “await approval” by the Departmental Scheduler through their 25Live tasks before the reservation is assigned into the 25Live room calendar.**

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. Also as with the Event Locations section, toggle the “Auto-Load Starred” to “Yes” to get your starred resources to automatically show up as choices upon each entry into the event form.

Resources Search

Auto-Load Starred: No Yes

★ **Important: 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. The selected resource(s) will show underneath the Resources Search box in the same fashion as the locations did in the Event Locations section. (Please note that any extra resources should be scheduled through Conference and Event Services- this includes any extra tabling, catering, custodial needs, etc.).**

Event Resources

Resources Search

Your Starred Resources

Your Starred Resources x

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 within the Event Form to fill out the Contact Roles. Your name will populate in the “Scheduler” field **and should remain that way**. The “Requestor” field, however, can remain with your name or the actual requestor’s name can be selected if they exist in the system. There is a later field that allows for comments if you want to elaborate on the Requestor’s information there instead.

Contact Roles for this Event ⓘ

Requestor Scheduler

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 and accessible by Conference & Event Services. Specific training for these fields is provided to CES users by the CES 25Live Functional Administrator or another qualified individual.

➔ **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

All schedulers should add any pertinent comments to this next section. Please remember that 25Live is a publicly viewed scheduling platform, so comments should be limited to necessary and impartial information.

Event Comments ⓘ

Event Confirmation Notes ⓘ

Internal Notes ⓘ

You are now ready to Confirm and click on Save.

Event State ⓘ

Confirmed

Cancel Preview Save

After saving the event form, always review the reservation to make sure it appears as you intended. The general 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 under the Occurrences tab is where the day(s), time(s), room(s), and assigned resources (if any) appear:

Test Reservation Confirmed 2020-ACJTD M Fri Sep 11 2020 10:00 am - 11:00 am CAND 0025 CAND 0395 Notification Facilities Unlock/Lock Facility - By FM

Details Occurrences Calendar Schedule Task List Pricing Audit Trail

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 any rooming or resource information, please click on “Edit Event” from the Details or Occurrences page and simply add those missing items to the event form and save again.

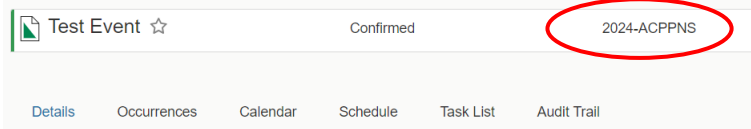
Test Confirmed 2019-ACHQH H Tue Sep 17 2019 8:00 am - 9:00 am CAND 0375

Details Occurrences Calendar Schedule Task List Pricing Audit Trail

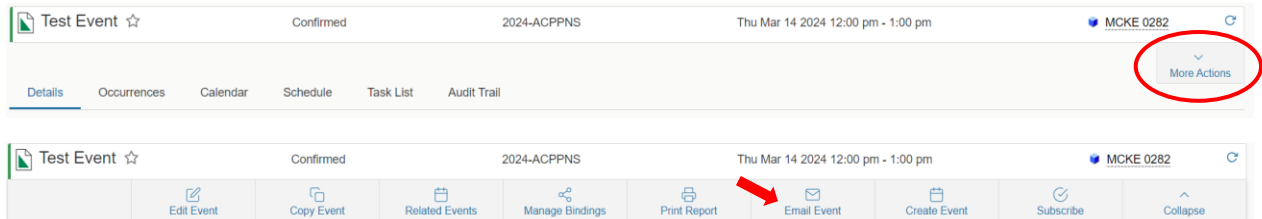
Edit Event Confirmed More Actions

TIP: As mentioned earlier, 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. The scheduler that entered the reservation is responsible for making sure the event is roomed after approval or for finding another location for the reservation if denied.

Another Tip: If ever experiencing an issue with a reservation, please reach out to 25Livehelp@unco.edu. Please provide the reference number along with the issue. The reference number can be found at the top of the Details or Occurrences tab of the relevant reservation as shown circled in this example.



After a reservation is entered through the event form, more actions can be taken from the Details or Occurrences tab of the relevant reservation when necessary. By clicking on the “More Actions” drop-down a menu will appear that allows for further options such as Emailing the event details to someone else.



When emailing event details, remember that not everyone knows how to access 25Live, so it’s best to send a PDF version of the reservation. To do that; after entering the email or selecting one of the Related Recipient boxes, Academic Schedulers should select “Default Confirmation: Event Confirmation (Detailed)” under the “Attach:” section. Then uncheck the “Include link to 25Live” box under Subject. Fill out the “Message Body” section and then click on Send. CES schedulers will follow the same basic instructions but will have other “billing” related options to select from. CES will do specific training for CES protocols.

