Getting Acquainted with 25Live

TERMINOLOGY

**Cabinet:** Highest level of organization.

**Contact:** An individual who is associated with an event and/or organization.

**Event:** Any activity defined as a specific type with a specific date range. An event may be a course, a meeting, a conference, a concert, etc…

**Event State:** An event’s current place in the planning or completion process.

- **Draft:** When an inquiry has been made with no request for booking.
- **Tentative:** When the event is not yet set in stone, but the group wants to hold the space.
- **Confirmed:** The event is finalized and the group is guaranteed to use the space and/or resources.
- **Sealed:** Events in this state cannot be edited except by the original scheduler or an administrator.
- **Cancelled:** These events are no longer going to occur.

**Feature:** A physical attribute of a space.

**Folder:** Where events live within the cabinet.

**Occurrence:** A single instance of an event activity defined by a reservation.

**Organization:** Academic/ Administrative department/ Organization, student group or non-Duke entity sponsoring an event.

**Reservation:** A set of one or multiple (“repeat”) date/time occurrences defined for an event activity. When creating an event, the scheduler assigns the required spaces and resources to each reservation associated with the event.

**Resource:** Any equipment, service, personnel, supplies or other item that could be assigned to an event reservation. It includes items not already present in spaces.

**Event Wizard:** Interactive 25LIVE form where events are created, availability is checked and spaces and other resources are assigned.

**Workflow:** An automated notification and response process that allows users to track the progress of task requests for services, approvals and space/resource assignments required for events and their individual activities.
ACCESSING 25LIVE SITE

Schedulers should go to http://25live.collegenet.com/dukesched.

Click “Sign In” on the upper right then log into the site with your 25LIVE username and password. Your customized 25Live Home dashboard page will appear.

From the 25Live Home page, you can go to the different areas in 25LIVE you’re likely to visit most often, to perform tasks such as:

• Process Event Drafts.
• View the availability of your “starred” locations or resources.
• Find out what’s happening in a room next week, or month or this time next year.
• See a calendar of events you’ve scheduled.
• Find out about the tasks assigned to you in 25LIVE.
• Run a 25LIVE report.
• And much more….
**NOTE** If you are a new user, 25Live Home Dashboard will not contain any personal items such as your favorite spaces or favorite events.

Adding “Starred” Items to 25Live Home Dashboard

You can “star” any event, space, or resource that you use regularly on to your 25Live Home Dashboard. Starring these items will allow you to directly open from the 25Live Home Dashboard as well as check availability and submit a request.

1) From the 25Live Home page, search for a location that you use or schedule regularly by entering the name in the Quick Search Location box on the middle of the page and Click Go.

![Search for Locations](image)

2) Click the hollow star next to the space. The star should change to yellow.

![Search for Locations](image)
3) Go to the Home Dashboard page by clicking the Home tab ( ). The “starred” location will appear under the “Your Starred Locations” section on the right.

4) Repeat the same steps to star other locations, resources or events.
Processing Event Drafts

Schedulers will receive an email notification when a request for a space they schedule has been submitted. The email will list the event details along with who submitted the request. Schedulers can process the event draft by logging into the 25Live “SCHED” website.

From 25Live Home Dashboard page:
2) Scroll down to the “Event Drafts” section.
3) Click on “x Event Draft in which you are the Scheduler. A list of drafts assigned to you or your scheduling unit will appear.
4) Right-click on the event draft you want to process and select “Edit Event”. The event request form will appear with the event draft details.

1) Review the event details, i.e., date/time, organization, head count, categories, comments, etc. Then navigate to the “Locations” field which is listed on the 2\textsuperscript{nd} page. If more than one location is listed under “the location(s) requested will be listed under “The following locations were requested for this event:” , the scheduler should verify if the requester is requesting more than one space, by doing the following:
   a. Scroll down the 2\textsuperscript{nd} page to the Additional Required Information section
   b. The number of locations requested will be listed in the “# of Rooms Requested” field. If more than 1 space has been requested the value in this field is 1, then the requester is listing their space preferences (i.e., 1\textsuperscript{st} choice, 2\textsuperscript{nd} choice, etc).
2) Navigate back to the Locations field. Click on "Matching Location Requests". The requested locations will appear in the middle section. If the locations are available, a green check will appear next to the location name.

3) If you approve the location request, click on the Location(s) requested. The location(s) will appear on the right side under “Selected Locations”.

4) Navigate to the Event Type field, which is located on the 1st page. Change the “Event Type” to the appropriate type for your unit/group (i.e., Smith Event, A&S Event, Fuqua Event, etc.) by clicking on the Event Type name. The clicked event type will appear on the right under “Selected Event Type” section.
5) Navigate to the **Event State** field. Change the “**Event State**” to either Tentative or Confirmed by clicking on the **Event State**. Both of these options will schedule the space; however, Tentative can be used as a placeholder if you are waiting on additional information before actually confirming the space and emailing the requestor a confirmation. **NOTE** Make sure to change the event type BEFORE changing the event state to confirmed or tentative. After an event is saved as either Tentative or Confirmed, the event type CANNOT be changed.

![Event State selection](image)

6) Review the event details and ensure you have selected the correct event state and event type.

7) Verify that the correct category is selected. If not, refer to the BPE email to select the correct categories.

8) Verify that the “Duke University Scheduling Policies” checkbox is checked. This is located on the **2**nd page.

9) Then navigate to the **2**nd page, scroll down the page and click “**Save**”.

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**Sending a Confirmation Email**

After approving the event draft, a confirmation email should be sent to the requestor. The confirmation report should be included as an attachment in the email to the requestor.

To send an email confirmation, do the following.

a) Click on the “Email Event Details” link. The default contacts listed will be the scheduler and the requestor. If you would like to send the confirmation to additional recipients, enter the email addresses in the “To”, “CC”, or “BCC” fields, accordingly.

b) Click the checkbox next to the Requestor under “To”.

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c) Click the checkbox next to “Event Confirmation (detailed)” to attach the report to the email.

d) If you would like to enter additional comments/instructions/information in the email message body, type it in the top of the “Message Body” field box.

e) Click “Send”.
**NOTE** If there is a standard message you would like to send with every confirmation email, you can update your email settings to display the message in every email sent. Do the following steps:

a) Log into the 25LIVE client.
   b) Select ‘Options’ → ‘User Preferences’ → Email.

In the signature field, enter the text you would like displayed. If you would like to be copied on all emails you send, select that checkbox option.

Click OK.

The Email Signature will appear at the bottom of the confirmation email. Some units enter their specific policies for using their spaces. Below is a sample email signature for one of our scheduling units:

“If you need to cancel or modify this reservation, please reply to this message and copy schedulingunit@duke.edu.

PARKING ONLY: Please print this confirmation notice and place on your dashboard while parked in the parking lot. Cars parked without displaying a valid confirmation notice will be subject to parking tickets.

AUDIO VISUAL NEEDS: Please consult AV Support, avsupport@duke.edu about your Audio Visual needs, 2 weeks prior to your event.”
Changing the Scheduler of a Draft

If your space is not available but you are aware of another space that may be available, you can assign the scheduler of that space to the draft event. Below are the steps to change the scheduler for a draft.

These steps can be done on the 25Live request form.

**NOTE** Before changing the scheduler, make sure that the event type is “INITIAL REQUEST” and the event state is “Draft”.

1) Open the request.
2) Navigate to the 2nd page and scroll down to “Contact Roles for this Event” on the request form.
3) Check the box next to “Scheduler”.
4) Select “Search” under the “Find by…” box
5) Enter the new scheduler name. The format is “last_name, first_name”.
6) Click “Search” button. Highlight the name so it will appear on the right under “Selected Contact” section.

7) Scroll down & click “Save” button.

After changing the scheduler, you should send an email to the new scheduler stating reason the scheduler was changed and any other relevant information. Instructions on how to send an email from 25Live is listed on page 9.
Directory Searches

There are four kinds of searches in 25LIVE: Event searches, Space searches, Resource searches and Organization searches. An Event search allows you to group events by type, cabinet and many other criteria. A Space search allows you to group rooms together based on features, categories, capacity or many other options. A Resource search allows you to group like resources together by category and other types. An Organization search allows you to group departments and other types of organizations together.

These searches give you the power to retrieve data based on virtually any of its characteristics, including properties, relationships, event usage and dates/times. Once created, these searches can be saved for reuse by you and other schedulers.

1) Click on the appropriate tab (Event, Locations, Resources or Organizations) in 25Live where you would like to perform the search.

2) Click on ‘Search for..’ tab

3) Enter the name of the event, location, resource or organization in the “Search by Keyword” field.

4) If the search results are what you want, click on to save the search results.

5) There are two options to save the search results.

   a. Search Criteria
   b. Search Results

   NOTE: Search criteria will contain any results that contain the search information you entered. Search Results will save the EXACT results that were yielded at the time the search was performed. (i.e., if “user training” is entered for an event search and 4 events are returned, only those 4 events will be saved with the “search results” option. However, any new events with the name “user training” will be included in the “search criteria” option.)
6) Enter a name for the search & click “Save Search”.

**NOTE** To ensure the search will appear under “Your Starred Searches” on the 25Live Home Dashboard page, make sure to check the box next to “Add this to Your Starred Searches.

### Reports

Most of the reports in the report directory require saved searches to specify the records to consider for inclusion in the report output.

Any saved search you’ve made a Favorite will be displayed in 25Live. The Reports tab contains all the standard reports provided with 25LIVE and any custom-built reports.

#### GENERATING REPORTS

1) Click the Reports tab. A list of tabs with available reports will be displayed (i.e., Events, Locations, Resource, and Other Reports).

2) Click on the appropriate tab.

3) Click the dropdown list to view the available reports.

4) Select a report and enter the appropriate report parameters. The report parameters may include date/time, “favorite” event searches, “favorite” space searches, etc.

5) Click **Run Report**. A download page will appear. A download dialog box will appear within 10 seconds that will allow you to select the location to save the report or open the report to review.

6) Click Ok.
If you encounter any issues viewing or saving a report, send an email to help-25live@duke.edu.