USER TRAINING GUIDE

25LIVE

ROOM RESERVATION SYSTEM
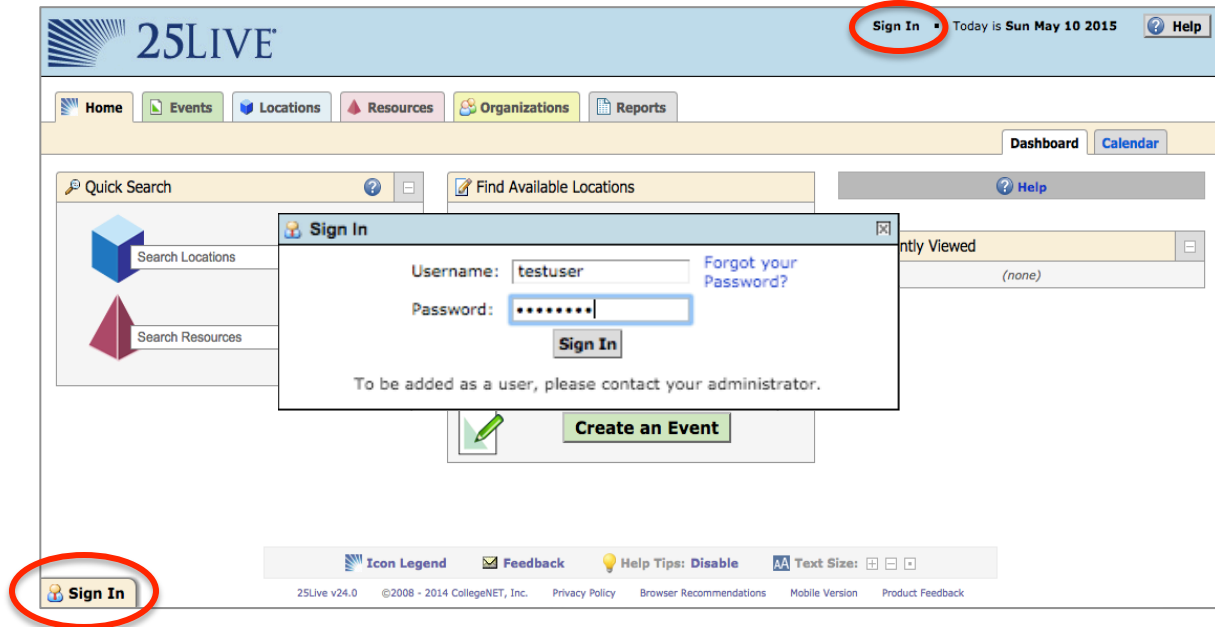
25 Live Training Guide
## for Meeting Planners

BASIC FEATURES

Signing In

1. Go to **25live.collegenet.com/fuller**
   TIP: Bookmark this page or save as Favorites in your browser.
2. Click on **Sign In** link on the upper right corner or lower left corner of the page.
3. Enter your Username and Password. Click on "Sign In" button.


Dashboard Navigation

1. Shortcut (or Dialog) boxes – provides convenient ways of accessing event items
   - Quick Search – Search known events, locations and resources using key words
   - Your Starred locations, events and resources – frequently used / favorite event items
   - Your Starred location, event and resource searches – frequently used SAVED searches
   - Your Event draft – Any incomplete SAVED event requests
   - Task list – To do list associated with events/meetings
   - Event wizard – Used for creating event requests

Sample Shortcut boxes
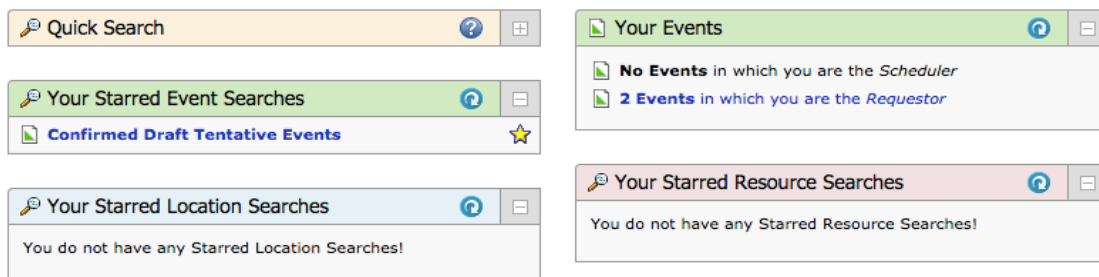
2. Dashboard Customization – organizes the shortcut boxes
   - Click on the [Customize Dashboard] button.
   - To hide a shortcut box, click the title bar of the box, drag and drop it in the grey area.
   - To display a hidden shortcut box, click the title bar in the grey area, drag and drop the box in the main dashboard area.
   - You can also move and reposition the shortcut boxes within the main dashboard area.
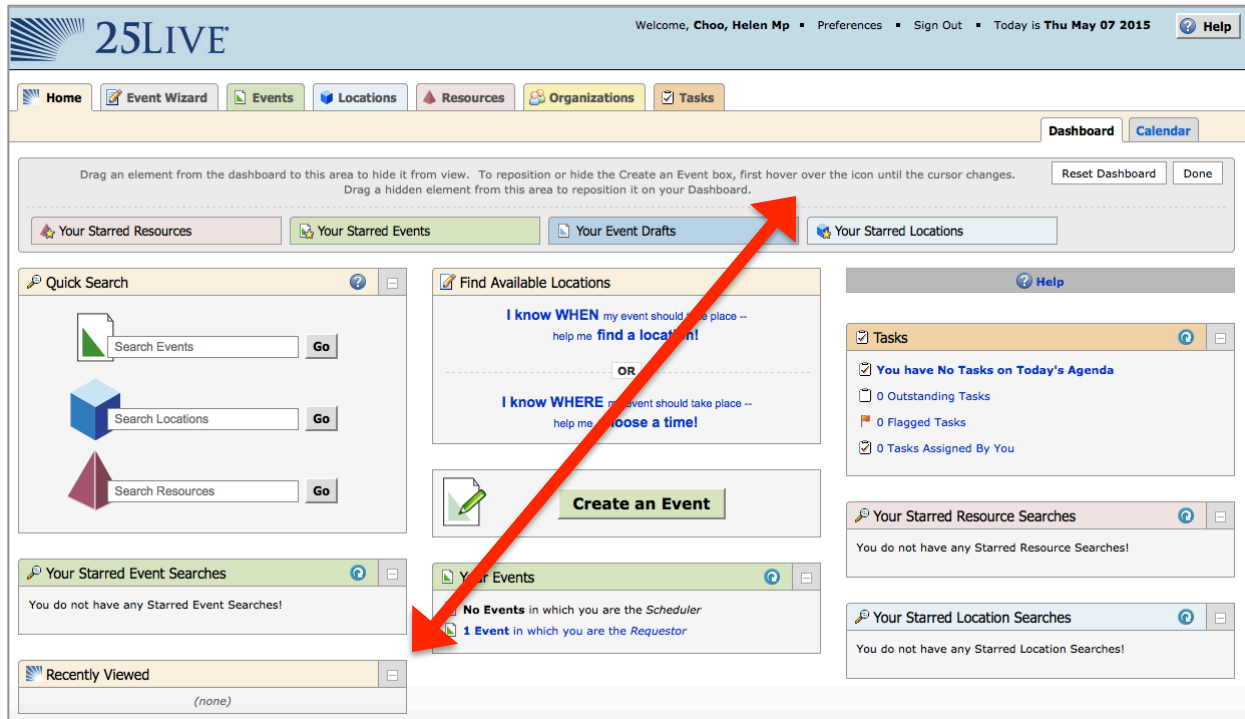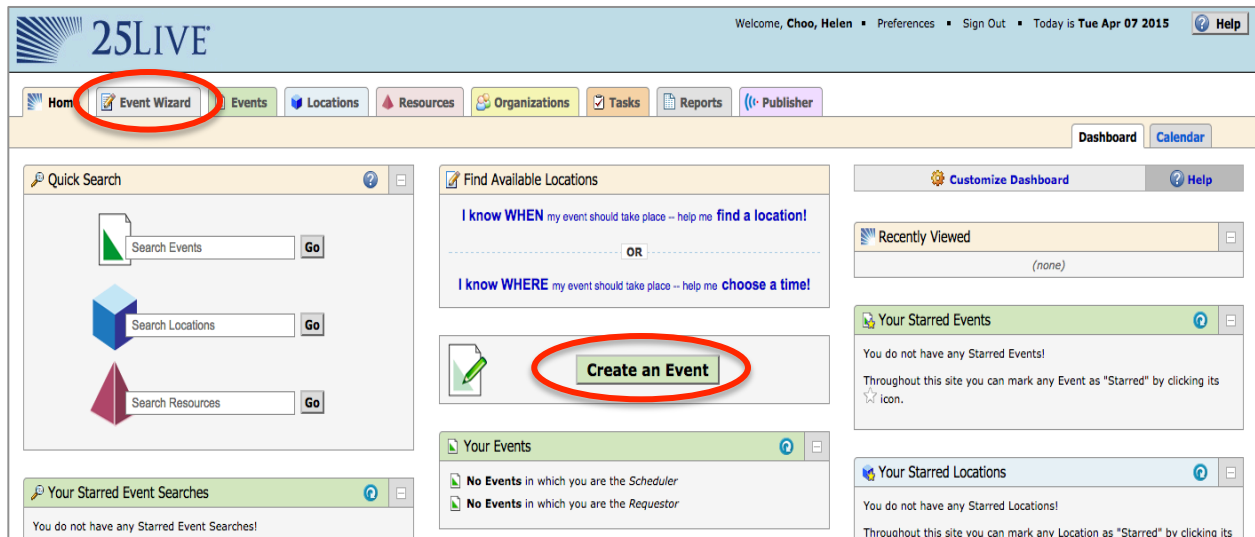

Using Help

Help files are available if you have any question. Click the [Help] button in the upper right of the page to access all Help topics. You may also click the [?] help icon throughout the website for context-specific information.
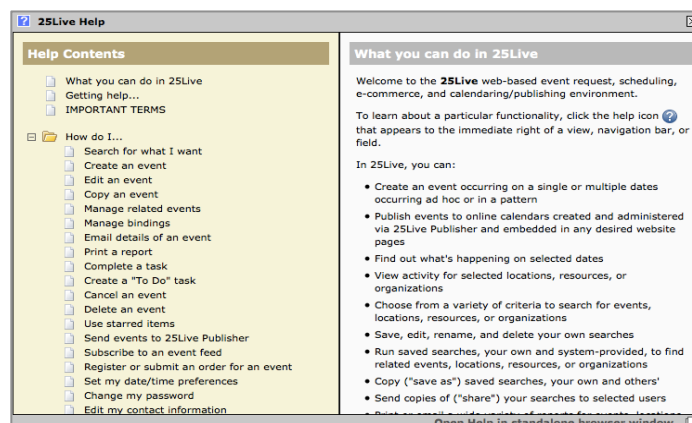
CREATING AN EVENT

Using "Event Wizard" to create a new event

1. Click the "Create an Event" button or "Event Wizard" tab.

2. Enter information as prompted by Event Wizard.

➢ Enter basic event information

- Enter the event name.

- Enter the event type or select from the drop down menu.

- Enter the Primary Organization or click on Browse… to search by Index (alphabetical order), Type or Categories.

- Click on "Next" button to continue.

❖ **HELPFUL TIP:** To continue the event creation at another time, click the "Save" button.

"Star" ⭐ any event item you frequently use to add to the shortcut box.

➢ Enter additional event information

- Enter expected head count

- (Optional) Enter event description using the content editor

- Click on "Next" button to continue

➢ Indicate frequency of event

- Click "No" for one-time event, "Yes" for recurring event

  o If selecting "Yes", skip the next step and go to page 7.

➢ Enter event date and time for one-time event

- Enter start date/time and end date/time

  o *(Optional)* Enter pre-event information
  o *(Optional)* Enter post-event information

NOTE: The total reservation time including pre/post event time is indicated on the right

- Click on "Next" button to continue. Go to page 8.

➢ **Create recurring events**

- Indicate how often the event will repeat.

- Click on "Next" button to continue.

- Enter FIRST occurrence of the event.
  - *(Optional)* Enter any pre-event and/or post-event time.

- Click on "Next" button to continue.

- For Ad Hoc events, click on dates on the calendar to add to the occurrence list

- For daily, weekly or monthly repeating events, select dates using the calendar or enter number of occurrences.

- Click on "Next" button to continue.

➢ Select event locations

Search by Location Name

- Enter partial or full location name (e.g. PAY or PAYTON). Press **Enter** on your keyboard.

  ✔ *Green check mark indicates available locations.*

  o *(Optional)* Uncheck to display locations with time conflict.

  o *(Optional)* Uncheck to display locations that do not meet the head count criterion.

- ❖ **Helpful Tip:** To view conflict details, click on event's ⚠ icon.

❖ *Note:* Locations that display briefly and disappear do not meet the search criteria.

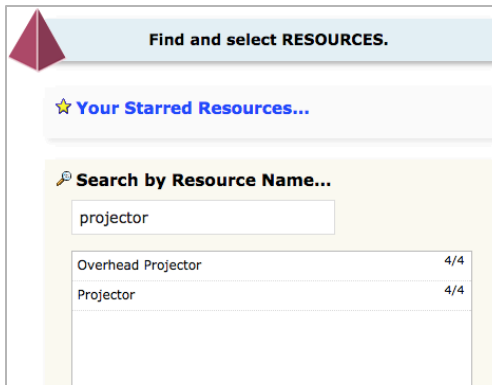## Search by using Advanced Search

- Select one or more search criteria to find available location.

  o Features: enter or select room feature(s)
  o Categories: enter or select space type(s)
  o Layouts: enter or select room layout type(s)
  o Capacity: slide the bar left or right to adjust for space capacity

- Click on "Search" button

- Click on location name(s) to select location. Selected location(s) will display on the right side of the screen.
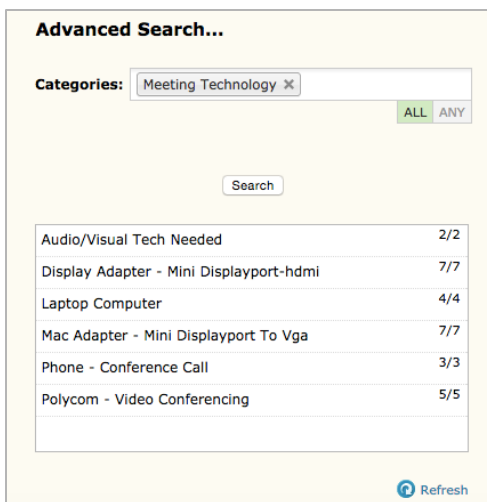
- Click on "Next" button to continue.

➢ **Search for Resources**
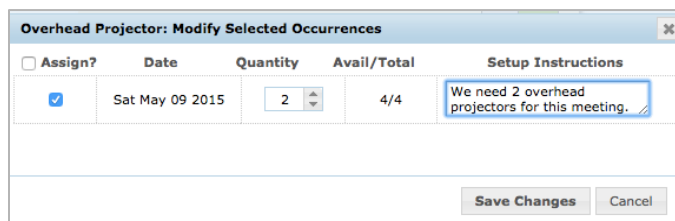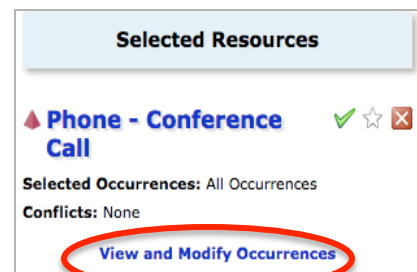

Search resources by name

- Enter resource name. Press **Enter** on your keyboard.

  o Numbers displayed on the right (e.g. 4/4, 5/6) indicates current inventory

- Click on resource name to select.
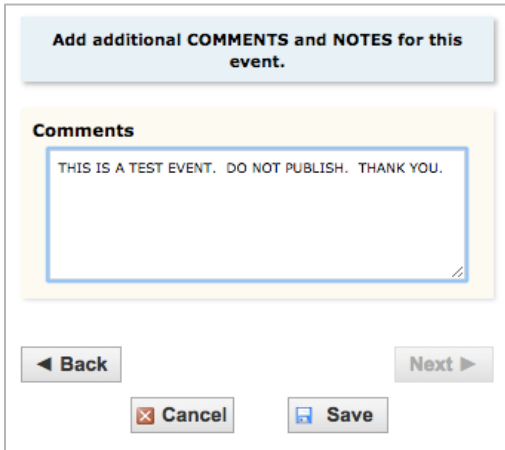

Search Resources using Advanced Search

- Enter the resource category or select from drop down menu.

- Click on "Search" button.

NOTE: If you change or add resource category, be sure to click on "Search" button or Refresh.

- Click on resource name to select.

- Selected resources will display on the right.

- *(Optional)* To modify resource details, click on "View and Modify Occurrences"

  o Enter quantity and setup instructions if any
  o Click on "Save Changes" button
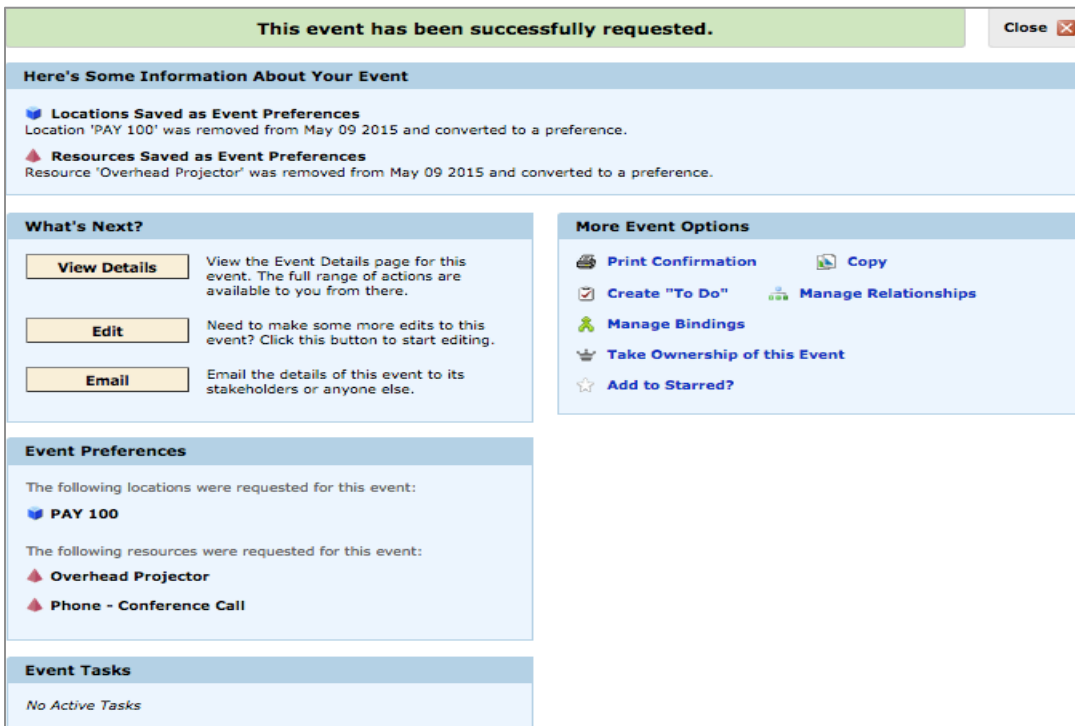

- Click on "Next" button to continue.

➢ Additional comments or notes

Add additional COMMENTS and NOTES for this event.

Comments

THIS IS A TEST EVENT. DO NOT PUBLISH. THANK YOU.

◄ Back   Next ►

❎ Cancel   💾 Save

- Enter any comments/notes about this event or special instructions.

- Click on "Save" button to complete event request.

- ❖ *NOTE:* Scheduler and all staff associated with the resources requested (e.g. tech support, event planning services, auxiliary services) will be notified by email. Your requested event will change from "draft" to "confirmed" status when Scheduler approves it.

3. View and edit event details

Click on "View Details" or "Edit" buttons on event request confirmation page.

This event has been successfully requested.   Close ❎

Here's Some Information About Your Event

🔵 **Locations Saved as Event Preferences**
Location 'PAY 100' was removed from May 09 2015 and converted to a preference.

🔺 **Resources Saved as Event Preferences**
Resource 'Overhead Projector' was removed from May 09 2015 and converted to a preference.

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.
Email	Email the details of this event to its stakeholders or anyone else.

More Event Options

🖨 Print Confirmation   📄 Copy
☑ Create "To Do"   ⛁ Manage Relationships
🧍 Manage Bindings
👑 Take Ownership of this Event
⭐ Add to Starred?

Event Preferences

The following locations were requested for this event:
🔵 **PAY 100**

The following resources were requested for this event:
🔺 **Overhead Projector**
🔺 **Phone – Conference Call**

Event Tasks

No Active Tasks

SEARCH & SAVE EVENT ITEMS

Search for Events

- Click on "Events" tab.
- Click on "More Search Options".
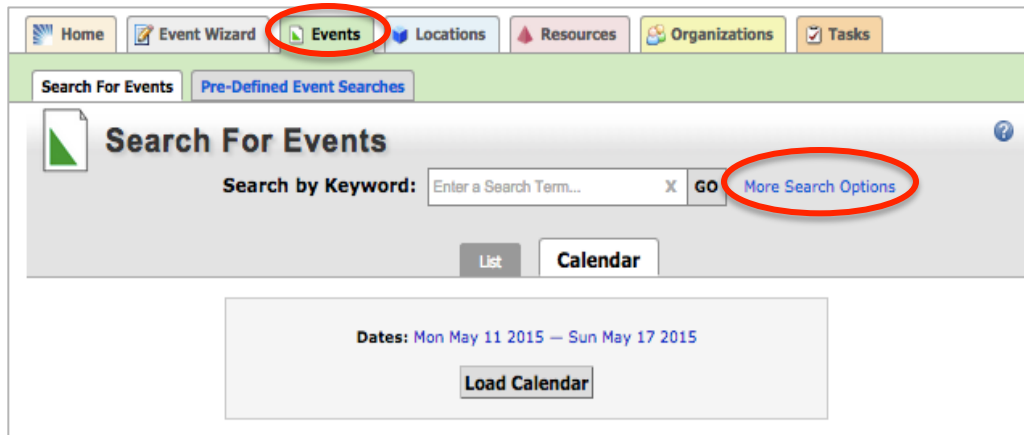
- Search event by Keyword – enter search term if known. Click on "GO" button.

- Search event using search options (Types, Categories, Organizations, Your Role and States)
   - To select events based on their status, click on EDIT next to "**States**" search option.
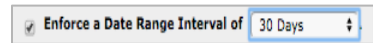   - Select "Draft", "Tentative" and "Confirmed".
   - Click on "Done" button.
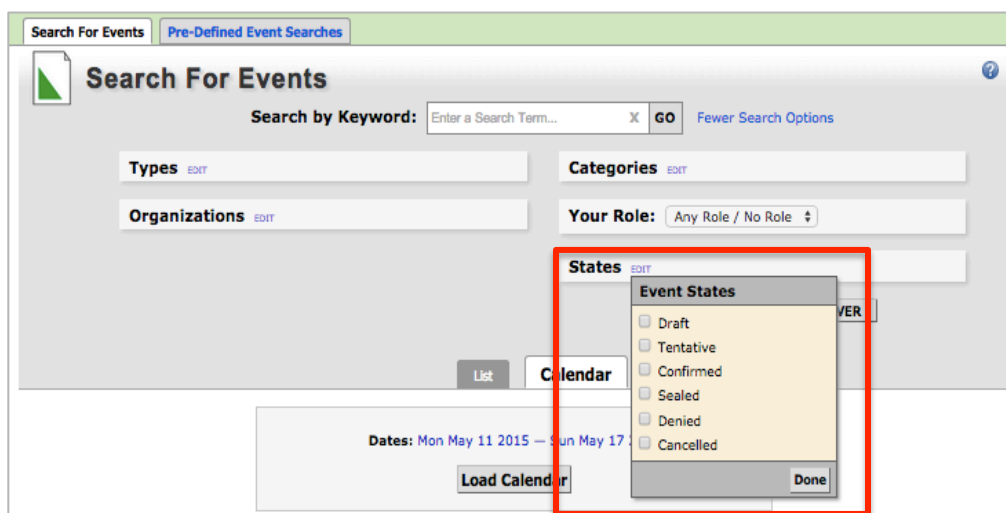
- Click on "GO" button to continue.
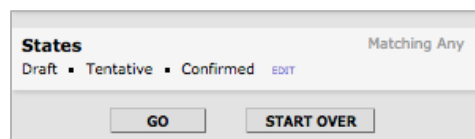
Event dates meeting the search criteria will load in calendar format.
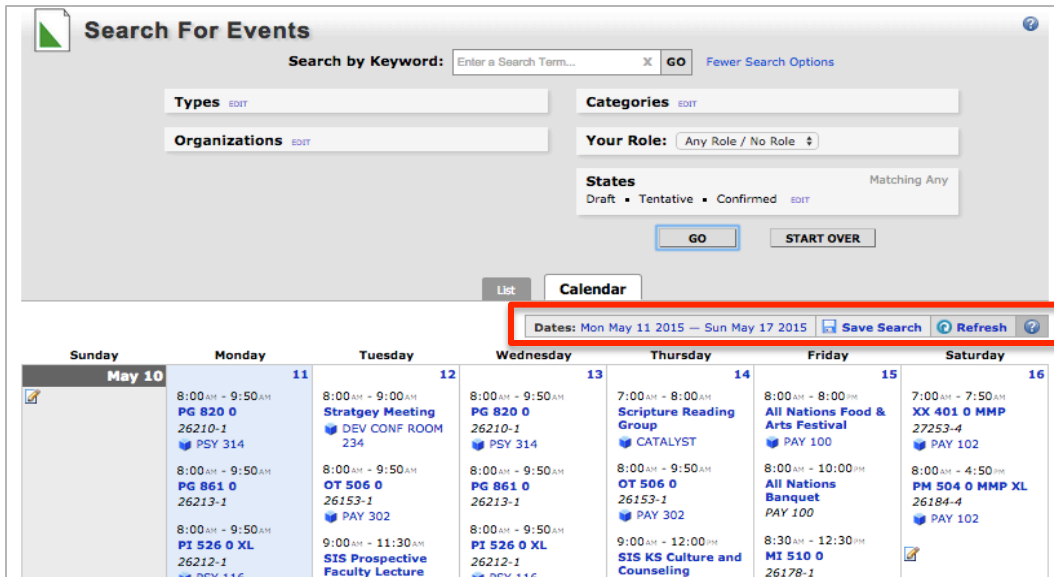
➢ To change the date range, click on the dates.
  • Click on the calendar dates to select start and end dates.
  • *(Optional)* Check the box to enforce date range interval.
  • Click "Done" button to continue.

Save event search

To save this search, click on button.
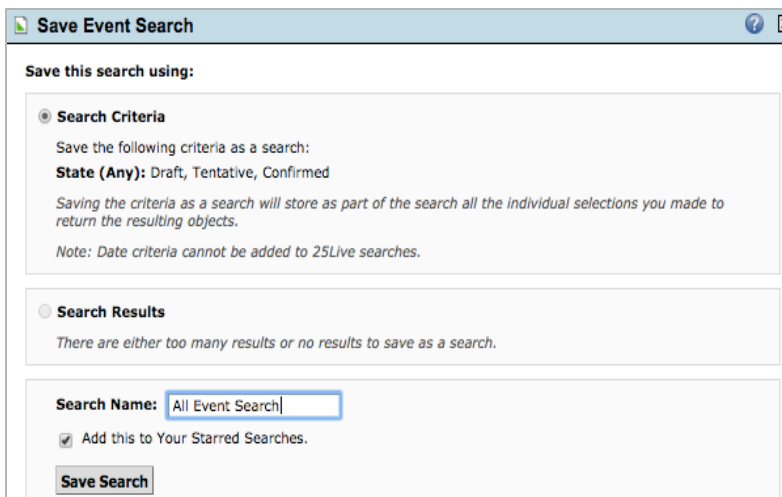
- Select Search Criteria.

- Enter the Search Name.

- Click on "Save Search" button.

  Note: Be sure "Add this to your Starred Searches" box is checked.

The saved search will now show on your dashboard.

Note: Refresh the home page see the new search.

Search for Locations

- Click on "Locations" tab.
  - Enter the search term to search locations by keyword. Click on "GO" button.

- Click on "More Search Options" to search by search options.
  - Click on "EDIT" next to each search option (Categories, Layout and Features).
  - Make selections from the drop down list. Click on "Done" button.
  - For Capacity, enter the number range.
  - Click on "GO" button to generate the location list.

Locations meeting the search criteria will display in list view.

- Click on the location name to view upcoming events at that location.
- "Star" ⭐ the location to save it as your starred location.

Save location search

To save this search, click on button.

- Select Search Criteria or Search Results to save

- Enter the Search Name.

- Click on "Save Search" button.

  Note: Be sure "Add this to your Starred Searches" box is checked.
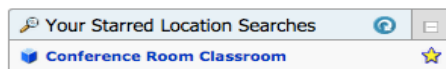
The saved search will now show on your dashboard. *Note:* Refresh to see the new search.

Search for location availability

- Go to "Locations" tab.
- Enter the location name or select search options.
- Select "Availability" tab.
- Click on "Load Availability" button.

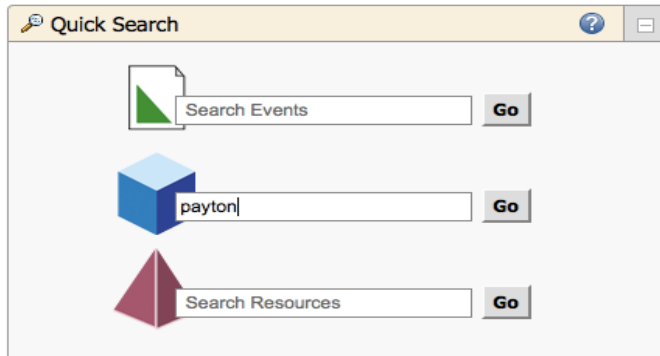Availability of locations meeting your search criteria will display.

- Click on left of right arrow to select another date.
- Click on to save this search.

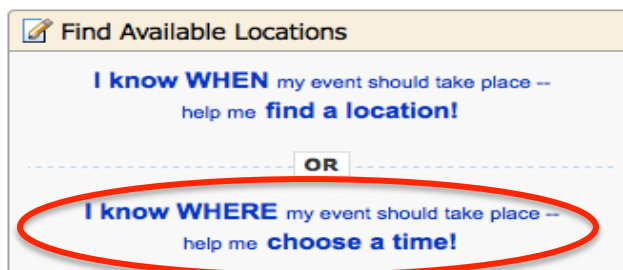**Search for location availability using quick searches**

<u>Using "Quick Search"</u>

- Enter the name of location in "Search Locations" field.
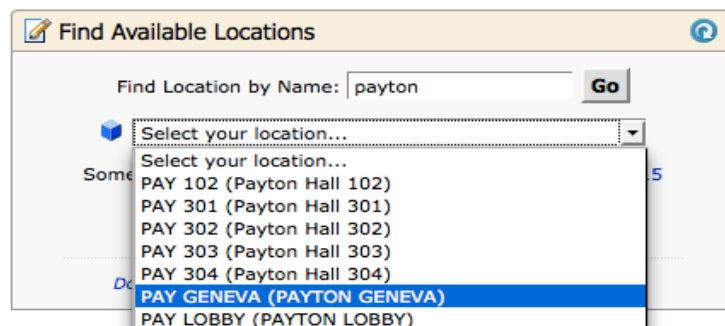- Click on "Go" button.

<u>Using "Find Available Locations"</u>

- Click on "I know WHERE my event should take place – help me choose a time!"

- Enter location name. Click on "GO" button.
    - Click on down arrow and select your location from drop down menu if needed

- Click on [Show me this location's availability] button to view location's availability.