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Course Introduction

Symbols and Conventions

Note: used to add clarification or provide additional information.

Prerequisites

There are no software prerequisites for this seminar.

Course Topics

- How to Request an Event Space
- How to Monitor the Request status for approval
Lesson 1: Browser Requirements and Log-in

Discussion

After lesson 1, you will know how-to:

• check 25Live browser requirements
• sign-in to 25Live
25Live browser requirements

25Live works with the Firefox browser. If you need Mozilla’s Firefox browser, go to www.Mozilla.com and download the latest version.

For assistance downloading or installing Firefox, contact the Support Desk, at x6888

Sign-in to 25Live

Always login to 25Live before making Requests of any kind. Otherwise, appointment data will be lost.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. In class, navigate to: the url provided by your instructor. For production, use 25live.collegenet.com/uakron Note: the url does not include ‘WWW’.</td>
</tr>
<tr>
<td>2. Open a browser and navigate to the address given by your instructor. Click the link to Sign In to 25Live.</td>
</tr>
</tbody>
</table>

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Steps

3. Enter your UANet ID and password at the Login prompt and click the Login button.

The University of Akron Login
Authentication is required to access corp.collegesnet.com.

   [Login interface]

💡 The University will never ask for your password. Do not disclose your UANet password to anyone.

4. We are returned to the 25Live Home tab
Page intentionally left blank
Lesson 2: Request an Event Space

Discussion

25Live features the Create an Event Wizard, a sequence of Event Cards-styled web forms that prompt for information needed to properly request a 25Live Event space. You can start the Wizard from the 25Live Home tab.

When scheduling an Event, be prepared with these 9 pieces of information:

1. **Event name** - as displayed on the 25Live calendar
2. **Event type** - meeting, meal service, etc...
3. **Event state** - whether confirmed or tentative
4. **Primary Organization** - the internal/external customer responsible for billing, answering any questions, etc... This can be an organizational contact or an individual.
5. **Date and Time** of the event
6. **Head Count** - an estimated head count for the event.
7. **Location** of the Event
8. **Categories** - tags used to advertise the Event through the Successful U smartphone application
9. **Comments**

After this lesson, you will know how to:

- Request an Event space in 25Live
Steps

1. Click the **Create an Event** button on the Home tab.

2. The Event Wizard tab has three main sections: Event Status, Event Details, and Event Cards.

   **Note**: any Starred (*) fields are required before the event can be saved.
### Steps

3. **Event name.** Click in the Event Name field and enter an event name.

   ![Event Name](image)

   *Event Name*

   Dog Grooming Championship

   *(maximum length is 40 characters)*

   **Note:** the **40-character** limit.

4. Click ![Next](image) and move to the next page.

5. **Event Type.** Choose from among your Starred Event types or click the **All Event Types** link to see available Event Types.

   ![Event Type](image)

   ![Selected Event Type](image)

   ![Find by](image)

   ![Choose from](image)

   - Event types categorize events for search and report purposes, so it is important to choose an appropriate event type.
   - Event types displayed depend on your security.

   **Note:** Save time by ’Starring’ (also known as favoriting) 25Live searches.

   **Set-up:**

   Add the type, ‘Training’, to Favorites.

   ![Add this to Your Starred Event](image)

   Note the hollow star.

   The event type ‘Training’ is now a Favorite

   ![Training](image)

   **Usage:**

   Instead of searching, click ‘Your Starred Event Types’

   ![Find by](image)

   ![Choose from](image)

   ![Your Starred Event Types](image)

   ![All Event Types](image)

   ![Comp/Tourney](image)

   ![Fair](image)

   ![Orientation](image)

   ![Training](image)

6. Click ![Next](image) and move to the next page.
7. **Event State**: indicates the event’s stage of planning or degree of completion. There are three event states. Choose Tentative when requesting an Event space.

   i. **Tentative** *(Note: only use this state)*
      - Use Tentative when requesting a space you **do not** control.
      - Event can be edited after save.
      - Locations and Resources are committed.

   ii. **Confirmed**
      - Event can be edited after save. Locations and Resources are committed.
      - Use confirmed when requesting a space you **do** control.
      - **Note:** Those requesting space should **not** choose Confirmed.

   iii. **Cancelled** - Cannot edit event after save. (Department Data Managers or one with higher security must unlock event for editing.)

8. Click **Next** and move to the next page of Event Cards.

9. **Primary Organization**: Next, specify the **Primary Organization** for this Event. The preferred method is to choose from **Your Starred Organizations**.

   **Note:** A Primary Organization sponsors an event and answers questions regarding billing or registration. You will typically choose as your department or college as the primary organization.
10. Click Next and move to the next page.

11. **Event Date and Time**: is a required field.
   
   ① Enter date values directly or by calendar pop-up.
   
   ![Event Date and Time]
   
   ② Enter time values directly 02:00 pm.

**Note**: **7-day lead time**: In order to allow Approvers enough time to respond, room requests have a 7-day lead-time. Therefore, the earliest a room can be requested is one week from the current date.
12. 25Live can adjust start and end times for Pre-Event and Post-Event tasks.

For example, an event that starts at 2:00pm and ends at 6:00pm, Pre/Post Event tasks may include meet and greet, stage take-down or post-event clean-up or party.

Note: how the Pre-Event meet and greet pushes the reservation back 3-hours.

13. Click Next and move to the next page.

14. Complete the Expected or Registered Head Counts.

15. Click Next and move to the next page.
16. **Event locations**: The Event space being requested.

   Either:
   
   i. choose from among your Starred locations.
      
      1. Click ‘Your Starred Locations’
      
      2. Your Starred Locations appear in the **Choose from...** panel.

   ii. Or search by Location Name.
      
      1. In the **Find by...** panel, click
      
      2. Enter the location name and click the **Search** button
      
      3. Choose from the matching locations presented in the **Choose from...** panel.
Steps

iii. Or search by: Index (alphabetical list), Category, needed Feature, preferred Layout, or Capacity.
Steps

17. Choose from the list. Note you can Hover over the icon to check availability.

18. Click and move to the next page.
19. **Event Categories:** Your choices advertise this event to The University of Akron campus, via the Successful U mobile phone app. However, if an event does not fit a category or you do not want the event advertised on Successful U, assign a category of **Not Applicable**. Assign no other category. Otherwise, choose all events that apply.

AC = Academic Career  
FA = Financial Aid  
HF = Health & Fitness  
LV = Leadership and Volunteering  
PG = Personal Growth  
PR = Personal Relationships

Get the Successful-U app here: [https://su.uakron.edu/mobile_version](https://su.uakron.edu/mobile_version)

20. Click **Next** and move to the next page.
Steps

21. **Event Comments**: Event Comments are extra notes or special instructions.
   - Event Comments are displayed in the Confirmation Report, which is sent to customers who request it.
   - Comments do not appear on the published to web calendar.

22. Read the scheduling terms and conditions. If you agree, click the 'I agree' checkbox.

23. To edit a previous step, click **Previous**.
    
    To complete the Event space request, click **Finish**.
Steps

24. 25Live finishes building the space request and verifies the room is available.

25. The completed Event space request. Record the Event Reference Number, as it can be useful for relocating the appointment.

This confirmation means the Event request has been made. However, you still need approval from the space owner. University business practice is approval should occur within 3 business days.

If you do not receive a response within 3 business days, contact 25Live@uakron.edu

<table>
<thead>
<tr>
<th>EVENT STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Event Reference: 2013-AAFRCG</td>
</tr>
<tr>
<td>✓ Last Saved: Wed Apr 17 2013 4:56pm</td>
</tr>
<tr>
<td>✓ All Required Fields Complete</td>
</tr>
<tr>
<td>✓ No Scheduling Conflicts Detected!</td>
</tr>
</tbody>
</table>

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Exercise: What’s Next?

Optionally, after creating the event you can review the event or send email details to the customer. In this exercise, we will email an Event Confirmation report to the customer.

Steps

1. From the What’s Next card, click Email.

   ![What's Next Card](image)

   **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.

2. Click the Attach checkbox to include a PDF attachment as part of the confirmation.

   ![Email Event Details](image)

   **Attach**:
   - Event Invoice
   - iCal File
   - Event Confirmation (Detailed)

   **Note**: the message body contains a url to the event, but very few event details are provided.

   Also select whether the requestor and/or scheduler should receive the message.
3. Click **Send** when ready.

   **Note:** Email sent within 25Live uses 3rd party mail servers (Collegenet’s). Email sent within 25Live is not reflected in your Outlook Sent Items folder.

4. Here is a sample Confirmation Detail email:

   ![Event Confirmation](image)

   **Event Confirmation**

   **National Dog Grooming Championship**

   **Title:**

   **Event Reference:**

   **Event Last Modified:**

   **Current Event State:**

   **Requestor:** SHULTZ, ROBERT DEAN

   **Phone:**

   **Email:** rds@uakron.

   **Scheduler:** SHULTZ, ROBERT DEAN

   **Phone:**

   **Email:** rds@uakron.

   **Organization:** 9200

   **Event Comments**

   **Comment:** special event comments/special instructions
### Exercise: Create an Event using the Event Wizard tab

You will create an event using the Event Wizard tab.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the Event Wizard tab and create the National Dog Grooming</td>
</tr>
<tr>
<td>Championship. Use one of the department or college locations for</td>
</tr>
<tr>
<td>which you are responsible.</td>
</tr>
<tr>
<td>2. Use a type of Exhibit.</td>
</tr>
<tr>
<td>3. Favorite (‘Star’) the Event type.</td>
</tr>
</tbody>
</table>
Lesson 3: Check the Status of an Event Request

The easiest method to determine when a space request is approved is to start from the Home tab.

<table>
<thead>
<tr>
<th>Steps</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the <strong>Home</strong> tab.</td>
</tr>
<tr>
<td>2. Locate and refresh the <strong>Your Events</strong> pane.</td>
</tr>
<tr>
<td>![Image of Your Events pane]</td>
</tr>
<tr>
<td>3. Click the link that reads ‘…in which you are the Requestor’.</td>
</tr>
<tr>
<td>![Image of Your Events pane]</td>
</tr>
<tr>
<td>4. The <strong>Pre-Defined Events Searches</strong> tab opens. If necessary, click the <strong>List</strong> sub-tab. Next, locate the <strong>State</strong> column.</td>
</tr>
<tr>
<td>![Image of List sub-tab]</td>
</tr>
<tr>
<td>5. An Event status will have one of three states: Tentative, Approved, or Denied.</td>
</tr>
</tbody>
</table>

If the status is **Tentative**, the request is still waiting on approval from the Event space owner.

If the status is **Denied**, the request has been declined and you may wish to contact the space owner for clarification.
Page intentionally left blank
Lesson 4: Get 25Live Support

Discussion

After lesson 4, you will know how-to:

- use 25Live Built-in support
- locate University of Akron support for 25Live
Built-in 25Live Support: Learn how-to perform new tasks

Steps

1. Locate and click the Help button.

2. Help is online documentation for understanding and using 25Live.
Steps

3. The Help window can be 1) resized, 2) moved, or 3) opened in a standalone window.

4. Expand the How do I... topic list, then select and read the Search for what I want topic.

With the appropriate security permissions, you can do the following to find what you want in 25Live:

- Perform a Quick Search on the 25Live Home tab Dashboard—for events, locations, or resources.
- Run a "simple" search by keyword or other options, and save the search if you like, on the Events, Locations, or Resources tab > "Search for...."
- Create an advanced search using multiple criteria; and run, edit, copy, and delete existing searches on the Events, Locations, or Resources tab > "Advanced...Search."
Steps

5. Select **Important Terms** from the Help Contents area and read the definitions for task and view.

subscription -- The process of setting up a feed to accept and display updated content for selected 25Live events or locations using a news reader/aggregator chosen from available subscription options. Personal feed subscriptions may be set up wherever you see the icon in an Actions drop-down menu.

task -- A To Do, approval notification, or assignment request that requires response by one or more "assignees." Task assignees or assigners use the Tasks tab to view just the tasks assigned to or by them. All the tasks associated with an event may be reviewed in the event Task List view on the Events tab, where assignees may complete their own tasks, change due dates, or add comments.

view -- The display generated by 25Live for a set of events, locations, or resources (or a single event, location, or resource), based on options selected, including date range and view format (such as Calendar, List, Availability, or Details)--depending on the kind of data being retrieved for display. Click the help icon at the immediate upper right of data displayed in a view to learn about view contents.

wizard -- A user interface that consists of a series of...
Contacting the Support Desk

Contact the UA Support Desk for additional assistance. You will need to provide your UANet ID, contact numbers for all parties involved, and a description of the problem.

You should try to have as much information as possible beforehand; examples include the Event reference number or Event name, the group sponsoring the Event, or the person who requested the Event.

Contact the Support Desk:

Tel: x6888

Web: http://www.uakron.edu/support-desk/

Email: 25Live@uakron.edu