

Series 25Live Training Basics

Description: Campus-wide Class and Event Scheduling

25Live® enables users to schedule campus space and resources all in one program. 25Live also has the potential to post scheduled events to calendars and to generate billing statements.

Logging In:

- Log in by using InsitePortal.
- Go to District Resources tab.
- Click **Series25 Production Login**. The username and password is the same as InsitePortal.
- You will log in again by clicking the **Sign In** button on the upper right hand corner of the screen. (Yes, you have to login twice 😊)

Trouble shooting: If the “Create an Event” box is not visible or nothing happens when you log in, try these:

- Make sure you signed into the “Production Login”, not the “Test Login”.
- Sign in again (find **Sign In** button in upper right hand corner of the screen).
- Use a different browser (Internet Explorer, Firefox, or Chrome).

Quick Tips/General Information:

- If you reduce the size of the screen display (zoom in), you are more likely to see confirmations and/or error messages.
- There is no logout button. To exit out of the program just close the browser.
- Do not use F5 or the reload symbol to refresh the page. To refresh, use the “refresh” symbol in each section.
- 25Live works best if you use the program’s directional cues instead of the back arrow.
- Color code symbols: **Green** = Events; **Blue**= Location; **Red** = Resources
- 25Live has access to locations, events and resources to all three (3) colleges, LMC, DVC and CCC.
- 25Live receives updated section scheduling information every 15 minutes.
- 25Live is set up for schedule by semester only. A timeline is being developed based on the DVC business procedure for Use and Assignment of Facilities. Instruction and support for instructional programs will reserve space first, so other requests can’t be submitted until schedules are posted. Once the priorities and timelines are confirmed, requests should be submitted within the specified dates.
- 25Live does not send automatic notifications to approvers when an event is submitted. Approvers are responsible for reviewing and assigning requests daily and confirming by email. And requestors are responsible for checking that the request has been assigned or if not, following up. 25Live includes an option to email event details for follow up.

Home Screen/Dashboard

Your home screen/dashboard is the starting point to search, create events and check on the status of your tasks. The following is a breakdown of the dashboard:

- Tabs across the top of the home screen - Gives access to do advance searches. (Event wizard, Events, Locations, Resources, Organizations, Tasks and Reports)
- Quick search box – Enter whole word(s) or a start-of-word fragment to find events, locations, or resources.
- Create an Event
- Tasks

CREATING AN EVENT

- Click on “create an event” or click on the “event wizard” tab (home screen/dashboard).
- The option “Find Available Locations” is less user friendly because it tries to optimize by class capacity.

Event Wizard Screen or Create an Event

On the right hand side of the screen the instructions and definitions on how to complete the event are displayed. The left hand side of the screen is confirmation of the event as it is requested. Complete the event request by filling out each page and clicking next until you have submitted your request. See instructions below.

- **Event name** - Enter a name that clearly describes the event. Type up to 40 characters
- **Event publish calendar** – not functional at this time
- **Event Type** - Select the event type that best describes the event from drop down menu. **NOTE: The event type cannot be changed once the event has been saved. Only one event type can be selected per event.*
- **Primary organization**- Organization responsible for the event.
- **Additional Organization**- Eventually, this can be used if you are invoicing another organization besides the primary organization. This process is not yet operational.
- **Expected Attendance** –
- **Event Description** - Enter additional information about the event here. This information will appear in the 25Live event detail view. **Note: DO NOT CHANGE THE FONT, FONT SIZE OR COLOR.*
- **Occurrence**- Select yes or no.
- **Event Date (One occurrence)** - Select the dates and times of the **actual event**. Setup, takedown, pre- or post-event times can be specified.
- **Event Date (repeating occurrence)** - Select the dates and times of **first occurrence** of the **actual event**. Subsequent occurrence dates will be entered on the next page (see picture below). Some tips here:
 - The program only allows the entry of ONE time block per event request. So if the event includes different time spans during the day, you will need to enter separate event requests for each.
 - The program allows the request of more than one room as long as the day/time for all rooms is the same. If the schedule is different per room, you will need to enter separate event requests for each.
 - The program does allow the entry of one specific time block on multiple days. You may find the “Ad Hoc Repeats” option the most user-friendly in these situations.
 - Setup, takedown, pre- or post-event times can be specified for repeating occurrences.

Ad Hoc Repeats

Individually select dates to add to the event.

Daily Repeats

Examples: Repeats every day for 5 occurrences; Repeats every 3rd day through a specific date.

Weekly Repeats

Examples: Repeats every week on Monday and Thursday for 12 occurrences; Repeats every other week through a specific date.

Monthly Repeats

Examples: Repeats every month on the 1st and 15th through a specific date; Repeats every 3rd Monday of the month for 6 occurrences.

Does Not Repeat

This event has only one occurrence.

- **Locations** – Search by building (begin with “D” for DVC and SRC buildings) or by type (DVC computer lab). **Select (DOUBLE CLICK) the Location(s) for your event from the list.** (Be sure that the room is displayed in the event details on the left hand of the screen before leaving this screen.) Multiple *Locations* can be requested. **Note: If the search does not return the expected result, try limiting the search term to a key word in the location name such as the building name.*
- **Resources** – The resources available in the room are displayed on the right hand text box. If you need additional resources, this is the opportunity to include them. Resources are defined as equipment or services that aren’t already

available in a specific location. Select the **Resource(s)** for your event from the list of favorite resources or search by resource name. Multiple **Resources** can be requested. **(Please note that the resources request process in 25Live is not fully operational at this time. Please independently confirm resource requests with the appropriate agency.)**

- **Contacts: Scheduler and Requestor** - The **Requestor Contact Role** is used to identify the organizer of the event or representative from the **Organization** responsible for the event. The **Scheduler Contact Role** is used to identify the person entering the event information into 25Live.
- **Comments** - Use this field to provide additional instructions or event information to **Location, Resource,** and **Published Calendar** approvers. This information is only viewable by the **Scheduler, Requestor** and any service providers or approvers of **Locations** and **Resources** assigned to this event.
- **Terms and conditions** - Check off **Agree**.
- **Event State** - All requests should be submitted with a **Tentative Event State**. (See picture below). To submit the event select **Tentative** and click **Save**.

 **Draft**

Your Location and Resource selections will be saved as preferences until this event is changed from its Draft state.

 **Tentative**

The event is scheduled, but is awaiting Confirmation from its Scheduler.

 **Confirmed**

The event is scheduled and confirmed.

 **Cancelled**

This event has been cancelled, and all Location and Resource reservations will marked as cancelled.

ALL REQUESTS MUST BE APPROVED (“ASSIGNED”) BY AN APPROVER BEFORE THE EVENT IS CONSIDERED CONFIRMED.

- The final message reads:

Your request has been successfully submitted. Your event is not confirmed until you receive a confirmation e-mail from a Location or Resource Approver.

- After the event has been submitted you are directed to the **Event Details** screen.

Events Details Screen:

In this screen you can view **details**, edit and email events; more options are available as well.

Quick Tips (Event Details Screen):

- “Save” only means save. Use the “Next” option until it no longer appears. Then click “Save”.
- 25Live does not send automatic notifications to approvers when an event is submitted. Approvers are responsible for reviewing and assigning requests daily and confirming by email. And requestors are responsible for checking that the request has been assigned or if not, following up. 25Live includes an option to email event details for follow up.
- Choose “more actions” to email the event details to its stakeholders or anyone else.
- The two event states you will see are tentative and draft. All sections from colleague are tentative as are completed event requests. If you are not sure if your event is approved, check in Tasks to see if the event has been “assigned”.
- Only District administration can cancel an event. Request this through SysAid.

Emailing Event Details:

- To check if your event is approved, go to the home page, TASKS box, “Tasks Assigned By You” field. Approved events will show “Granted/Completed”).
- After you receive confirmation that your location is approved:
 - Until all approvers are prepared to review and approve requests, be sure to email the 25Live event with resource requests to:
 - Media Services requests – helpdesk@dvc.edu
 - Buildings and Grounds (HVAC and other resource requests) – Lori Vickers (lvickers@dvc.edu)
 - Police Services (Unlock schedule and other requests) – Cpl Kathryn McDonald (kmcdonald@dvc.edu) and Vidal Garcia III (vgarcia@dvc.edu)

Editing the Event after Approval:

To edit an event after approval:

- Only the person who entered the event (Scheduler) and Approvers can edit it.
- Search for the event by entering key words in the [Quick Search – Search Events](#) field.
- Choose “Edit the Event”.
- From left hand information panel, double click on the element that needs to be updated.
- Once edits are entered, use the “Next” option until it no longer appears. Then click “Save”.

Quick Tips for Editing an Event:

- As the scheduler of an event, you may need to change the status of the event to “Draft” before editing it.
- To do this, search for the event by entering key words in the [Quick Search – Search Events](#) field. Choose the “Details” tab. Use the “Event State” field to adjust the event to draft. Then edit and save the event following the procedures above.

Locations

Searching for locations can be done through a quick search or by clicking on the location tab.

Quick Tips:

- To filter your search to the specific campus, building and/or room, use the following naming code: <college><building>*<room#>, (example: DAB*217).
- If this is unsuccessful, start with building only (begin with “D” for DVC and SRC buildings) or type (DVC computer lab).

Location Screen:

There are three (3) different screens/views for locations:

- List - Displays the name, formal name, categories, features, layouts, max capacity
- Availability - Shows the events scheduled in one or more locations on the selected date. An empty time slot means the location is available at that time.
- Calendar – Shows the events in calendar view. Click on the “Dates” field to adjust the calendar view.

Reports

Available in Reports tab. Then choose a tab for event reports, location reports, resource reports and other. Use drop-down menu for report options.

Quick Tips:

- 25Live does provide sample views for each report.
- At this time, the parameters for location are at the college level only, which may be more information than you need and which causes the report to take a long time to generate. We are working on refining this.
- Reports can take 30 minutes or more to generate.
- The most effective “Report Delivery Option” is to “Email this report to yourself”.
- We have had some success with “Event Monthly Calendar” and “Location Monthly Calendar”.