

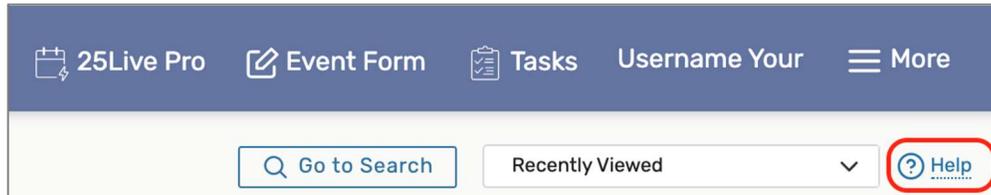


Creating an Event Using 25Live

Overview

Using the Online Help

All users can consult the online help for more information at <https://knowledge25.knowledgeowl.com/help/product-help>. Or, use the Help link in the upper right of the page to access all Help topics, or click the Help icon (?) throughout the application tool. You must be signed in to access 25Live Pro online help.



Security Note

System security determines whether you can create or request events. Ask your system administrator if you're unable to perform any functions you think should be available to you.

Accessing the 25Live Event Form



Go to Catawba.edu/25Live/ to access 25Live. Sign in with your Catawba College Single Sign On (SSO).

Your role is the Requestor. Conferences and Events will approve or decline the request within two business days. Generally, decisions will take place the same day, but larger events may require additional review time.

Take one of the following actions to start creating an event:



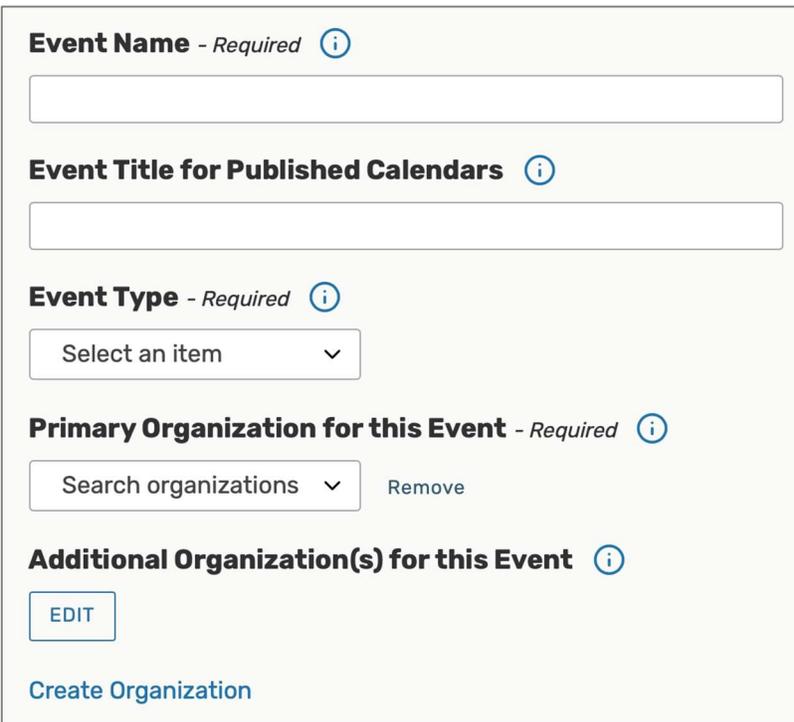
Image: Use the Event Form link in the top navigation bar to start creating an event.

- Use the **Event Form** link in the top navigation bar
OR
- Use the **Create an Event** button on your 25Live home dashboard
OR
- Choose an option in the **Find Available Locations** area of the 25Live home dashboard to start from a required time or location, if that section is present
OR
- Select the Create event create event () icon in a calendar view, availability view, or search results
OR
- Use the **Create an Event in this Location** option in the More Actions menu when viewing Location Details
- Use the **Create an Event that uses this Resource** option in the More Actions menu when viewing Resource Details

Stepping Through the Event Form

1. Enter Basic Information

- Enter an Event Name, Event Title, select an Event Type, and complete the Primary Organization. If any of these fields are required, they are labeled as such.
- Web calendars (if set up for your 25Live instance) and searches display the Event Name.
- Permissions determine which Event Types you can choose from. Your chosen Event Type determines some options that appear later in the form.
- Some fields in this section search ahead as you type in them.



Event Name - Required ⓘ

Event Title for Published Calendars ⓘ

Event Type - Required ⓘ

Select an item ▾

Primary Organization for this Event - Required ⓘ

Search organizations ▾ Remove

Additional Organization(s) for this Event ⓘ

EDIT

[Create Organization](#)

Image: Required fields are labeled on the Event Form.

You can Edit or Remove the Primary Organization or Additional Organization if displayed. If you cannot find the right organization, use the **Create Organization** link, if you have security permissions to do so.

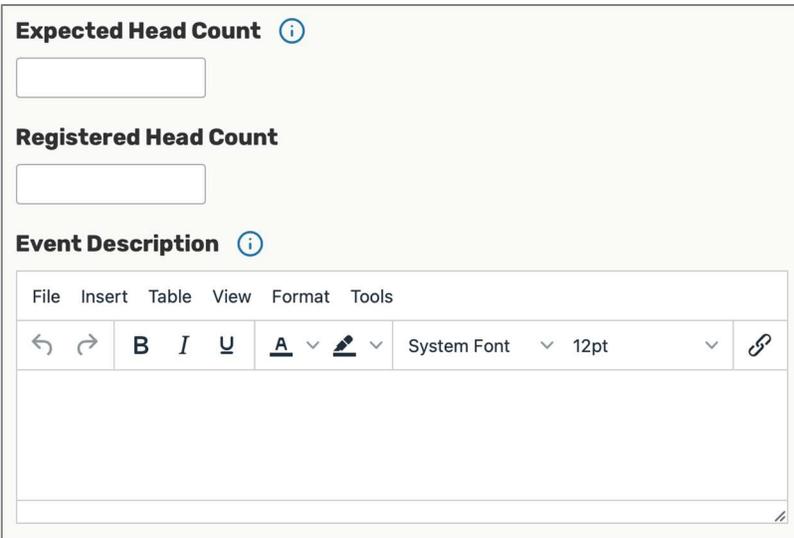


Tip: The Information Icon

Use the information (ⓘ) icon to view additional help and/or instructions for any field that displays it. Some help section may be open to read by default, depending on your instance and configuration.

2. Enter Attendance Information and Description

- **Expected Head Count**
- **Registered Head Count**
 - 25Live can use the expected or registered head count to find locations that can hold your event.
- **Event Description**
 - The Event Description can appear on web calendars if you intend to publish your event.



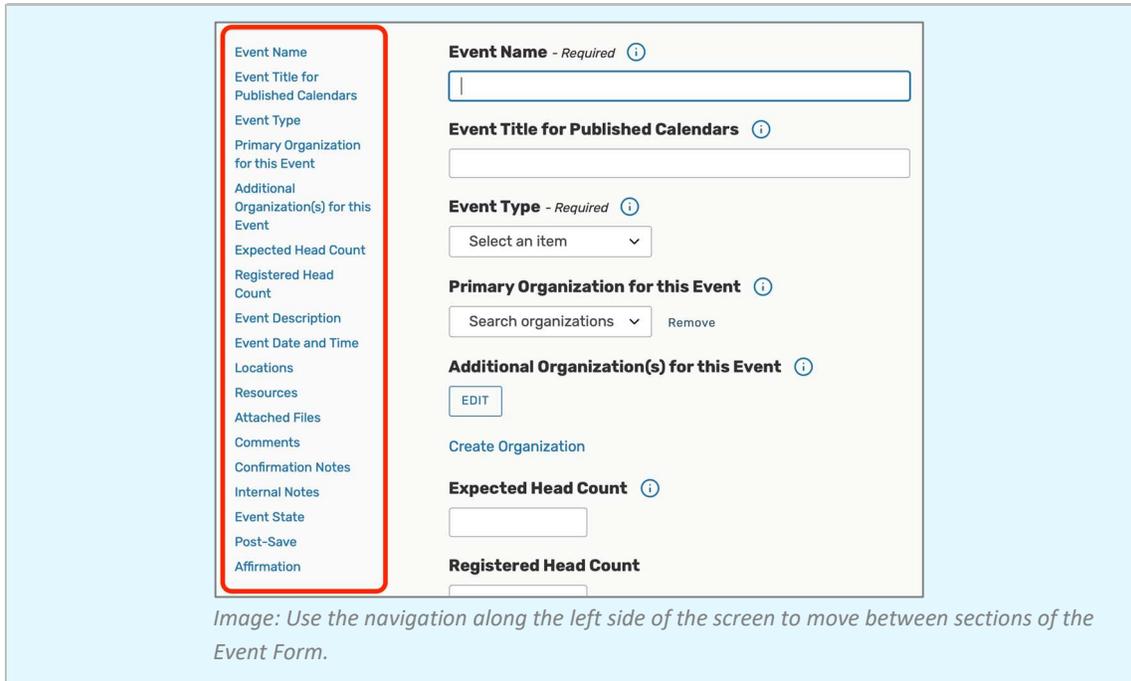
The screenshot shows a form with three main sections. The first section is titled "Expected Head Count" and has an information icon. Below it is an empty text input field. The second section is titled "Registered Head Count" and also has an information icon. Below it is another empty text input field. The third section is titled "Event Description" and has an information icon. Below this title is a rich text editor toolbar with the following options: File, Insert, Table, View, Format, and Tools. The toolbar includes icons for undo, redo, bold (B), italic (I), underline (U), text color (A), background color (brush), font face (System Font), font size (12pt), and a link icon. Below the toolbar is a large, empty text area for entering the event description.

Image: The Event Description field allows you to format text with a variety of options.



Tip: Use the Left Side Navigation to Move Around

The Event Form features convenient side navigation to the left of the sections and fields.



3. Enter Information About Your Event’s First Occurrence

Specify the date and times of the first occurrence of the event. If your event occurs on multiple days, you’ll describe how it repeats in the next section.

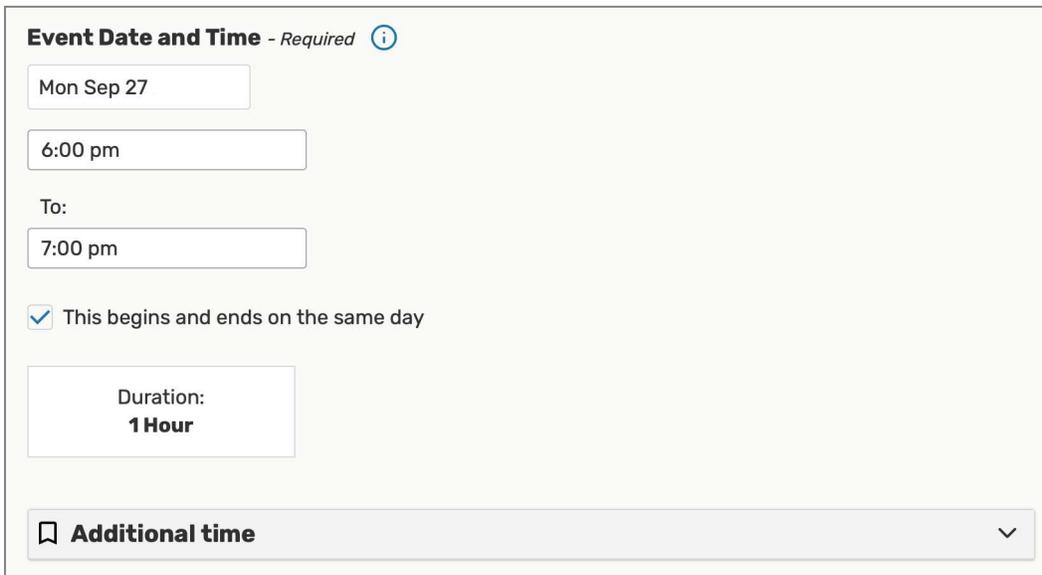


Image: Use the Additional Time section to add extra time to events, see [Adding Additional Time to Events](#).

You have the option to create a single occurrence of a multi-day event by using the checkbox for **This event begins and ends on the same day**. When the box is unchecked, you can choose an end date, however, **be aware that if this is a repeating event every subsequent occurrence will have the same multi-day duration.**

If the event requires Setup/Pre-Event and/or Post-Event/Takedown time, select the options you need by opening the **Additional time** display, then set the number of days, hours, or minutes needed. See the [Adding Additional Time to Events](#) help topic.



Security Note

System configuration and security determine whether you can use Setup, Pre-Event, Post-Event, and Takedown times for events. Ask your 25Live administrator if you're unable to perform functions you think should be available to you.

4. Optionally Choose How Your Event Repeats

If your event has more than one occurrence, select how the event repeats. 25Live allows you to create repeating events defined as either ad hoc/random dates or as a pattern (daily, weekly, monthly).

- Tap or click on dates on the calendar to create random (or ad hoc) repeat occurrences
 - You can also add additional, random dates after selecting and defining a pattern
- **Or** use the **Repeating Pattern** button to select the pattern type (including ad hoc dates) and complete its options, then use the **Select Pattern** button to save your choices

See the [Creating Repeating Events](#) help topic for details.

Click on the calendar below to add dates or click the **Repeating Pattern** button to select a date pattern.

Repeating Pattern



<< < July 2025 > >>

| S | M | T | W | T | F | S |
|----|----|----|----|----|----|----|
| 29 | 30 | 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 | 31 | 01 | 02 |
| 03 | 04 | 05 | 06 | 07 | 08 | 09 |

Manage Occurrences

5. Select Location(s)

Tip: Location and Resource Section Can Collapse

To help you view information more efficiently, you can expand or collapse the Location and Resource sections.

Start with a Saved Search or search for suitable locations by location name.

- Check the **Hide Conflicts** or **Enforce Headcount** boxes to narrow results
- To use [SeriesQL](#) for an advanced search, start typing two colons ::

As you search, 25Live checks for the availability of location(s) at your specified dates/times.

- Use links in the **Conflict Details** column to view more information about location conflicts
- The links on location names allow you to view location details

Locations ⓘ

Locations Search ^

Auto-Load Starred: No Yes

Hide Conflicts Enforce Headcount

Saved Searches (optional) Search Locations x

Hint! Type :: to use SeriesQL.

More Options v Reset Search

Image: Use the checkboxes above the search options to narrow results.

Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available locations for your event. A selected location appears as a pending assignment in event details and in the location availability grid until you save the event.

Location Occurrence Editing

25Live allows you to adjust settings per occurrence for each requested or reserved location. After adding a location, collapse the search, then use the **View Occurrences** link to add instructions, specify layouts, and additional options.

📍 **ARTS 102** Davis Arts Center - Practice Room 2 **Capacity:** 5 ☆

| Date | Time | Conflicts | Shared | Layout | Instructions | Attendance |
|------------|-------------------|-----------|--------------------------|--|--------------|------------|
| Mon Sep 27 | 6:00 pm - 7:00 pm | | <input type="checkbox"/> | As Is (5) v | | |

Remove View Occurrences

Image: There is a View Occurrences button on every requested/reserved location block.

See the [Adjusting and Editing Individual Event Occurrences](#) help topic for more detail.

| ARTS 102 | | | | | | | |
|-------------|-------------------|--|--------------------------|--------------------------|----------------------|----------------------|----------------------|
| 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"/> |
| Mon Sep 27 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | As Is (5) | <input type="text"/> | <input type="text"/> |
| Wed Sep 29 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Circle (4) | <input type="text"/> | <input type="text"/> |
| Tue Oct 05 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Circle (4) | <input type="text"/> | <input type="text"/> |
| Thu Oct 07 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | As Is (5) | <input type="text"/> | <input type="text"/> |
| Sun Oct 10 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> Conflict Details | <input type="checkbox"/> | <input type="checkbox"/> | As Is (5) | <input type="text"/> | <input type="text"/> |
| Tue Oct 12 | 6:00 pm - 7:00 pm | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | As Is (5) | <input type="text"/> | <input type="text"/> |

Image: Settings for location per occurrence.



Customization Note

Depending on how your 25Live environment has been configured, assigning a location to your event may automatically assign the "Location Scheduler" to the Scheduler contact role for the event, or a Default Scheduler may be assigned based on your security group. (The Location Scheduler is specified for a location in the Administration Utility and displayed in location details on the 25Live Locations tab.)

Your institution's business processes determine how you can proceed with submitting your event request when the event is auto-assigned another scheduler. If your user does not have permissions to view Contacts, some roles may not display.

6. Select Resource(s)

Start with a saved search or search for desired resources by name.

- Use the **More Options** dropdown to add additional search parameters, such as Categories
- To use [SeriesQL](#) for an advanced search, start typing two colons ::
- As you search for them, 25Live checks automatically for the availability of the resource(s) at your specified dates/times
 - Use the link(s) in the **Conflict Details** column to view more information about resource conflicts
- You can also view **Quantity Availability**
- The links on resource names allow you to view resource details

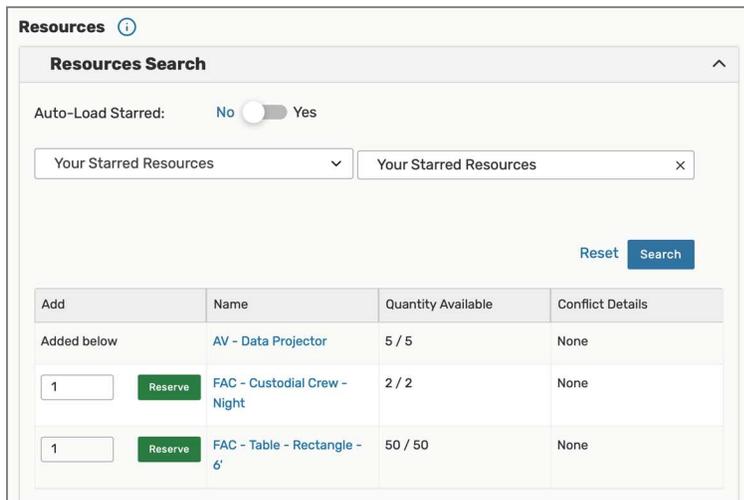


Image: Extra information about resources is shown in columns.

Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available resources for your event.

Resource Occurrence Editing

25Live allows you to adjust settings per occurrence for each requested or reserved resource. After adding a resource, collapse the search, then use the View Occurrences link in the resource block below to add instructions, adjust the quantity, and change occurrence information. A selected resource appears as a pending assignment in event details and in the resource availability grid until you save the event. See the [Adjusting and Editing Individual Event Occurrences](#) help topic.

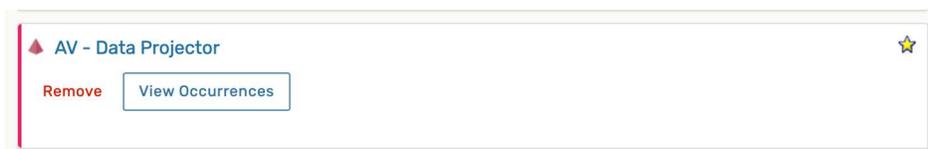
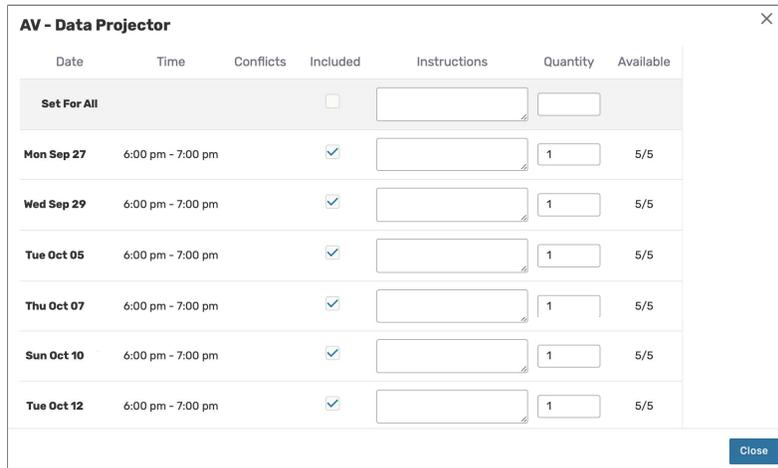


Image: There is a View Occurrences button on every requested/reserved resource block.



The screenshot shows a window titled "AV - Data Projector" with a close button (X) in the top right corner. The window contains a table with the following columns: Date, Time, Conflicts, Included, Instructions, Quantity, and Available. The table has a header row and seven data rows. The first row is a summary row for "Set For All" with an unchecked "Included" checkbox and empty input fields for "Instructions" and "Quantity". The subsequent rows represent individual occurrences, each with a checked "Included" checkbox, an empty "Instructions" field, a "Quantity" of 1, and an "Available" count of 5/5. A "Close" button is located at the bottom right of the window.

| Date | Time | Conflicts | Included | Instructions | Quantity | Available |
|-------------|-------------------|-----------|-------------------------------------|----------------------|----------------------|-----------|
| Set For All | | | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | |
| Mon Sep 27 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |
| Wed Sep 29 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |
| Tue Oct 05 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |
| Thu Oct 07 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |
| Sun Oct 10 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |
| Tue Oct 12 | 6:00 pm - 7:00 pm | | <input checked="" type="checkbox"/> | <input type="text"/> | 1 | 5/5 |

Image: Settings for resources per occurrence.

7. Attach File(s)

If your institution has configured and allowed file attachments for events, use the **Upload a file** button to optionally attach one or more files.

- You can attach up to 5 files
- Files may not exceed 25MB
- Allowed file types:
 - PDF, TXT, RTF
 - JPG, JPEG, PNG, GIF
 - DOC, DOCX
 - XSL, XSLX, CSV

You may also use this section to remove previously attached files from the event.

8. Enter Custom Attributes (If Displayed)

Select and enter values for any available custom attributes that are pertinent to your event. Custom attributes are different for each instance of 25Live. Use the No/Yes toggle(s) to add and complete any custom attributes.

Additional Event Information ⓘ

✕ Will there be food at your event? No Yes

✕ Will there be alcohol at the event? No Yes

* Publish this event on the public web calendar? No Yes

✕ Do You Need Help Promoting Your Event? No Yes

✕ Setup Style (brief description of tables and chairs)

✕ Brief Description of Technology Needs (Podium, microphones, screen for presentation, audio/visual)

✕ Will you require tech assistance? No Yes

✕ Does this Event Require Security? No Yes

✕ Detail Image [Add](#)

✕ Event Image [Add](#)

✕ Priority Override No Yes

✕ Link (website or registration)

[Add a Custom Attribute](#)



Note: Some Sections Need an Event Type to Display

If you do not see the Custom Attributes or Contact Roles sections, make sure you have selected an Event Type above. Additionally, some Event Types may not be configured to display these fields.

9. Select Contacts

Select the contacts associated with the event. To specify a contact, use the dropdown icon, enter a few letters of the contact's name, and select it when the full name displays. You can also add a contact by using the **Create** button then completing the displayed fields.

10. Complete Categories, Requirements, Calendars, Comments, and Notes



The screenshot shows a form with four sections, each with an information icon (i):

- Categories**: Includes an "EDIT" button.
- Comments**: A text input field.
- Confirmation Notes**: A text input field.
- Internal Notes**: A text input field.

Image: Sections and fields for Categories, Requirements, Calendars, and Comments depend on how your 25Live instance is configured.

Across the next sections, you may see choices for categories, requirements, and calendars, comments, and notes depending on how the Event Form has been customized for your institution, 25Live instance, and security group.

- **Categories:** Select the categories the event belongs to. Categories help other users find events when searching and can determine if your event displays on web calendars
- **Requirements:** Use the toggle to add pertinent requirements, such as a liquor license or a contract, and add comments or quantity information as needed
- **Calendars:** If you are promoting your event on one or more web calendars, choose the calendar(s) here, and enter comments as needed
- **Comments and Notes:** Enter appropriate comments and/or notes for the event and keep important information at the top
 - Event Comments can be seen by most users
 - Confirmation Notes are shown in Confirmation Reports
 - Internal Notes can be seen only by people who are event contacts, like Requestor and Scheduler

**Comment and Notes Fields are Limited**

Comment and notes fields are limited to approximately 32,000 characters. To prevent truncated text:

- Summarize email conversations rather than copying entire email threads into comment fields
- Limit or omit long HTML code insertions

11. Choose an Event State

Choose the appropriate state of your event. A few notes about event states (for more details, see the [Choosing an Event State](#) help topic):

- You have the option to set your chosen event state as your default for creating new events
- You may be required to save your event as a Draft, in which case any locations and/or resources you've requested will be saved as preferences, not assignments
- Tentative and Confirmed events can have assigned locations and resources
- The Denied, Cancelled, and Sealed event states are not available for new events and cannot be set as your default event state

If you're the event Scheduler or Requestor and you're able to save your event in a Tentative or Confirmed state, you become the event owner, with the right to edit, copy, or delete the event (unless a senior scheduler takes ownership of the event).

12. Choose Post-Saving Options

Convenient options are presented to allow you to choose your next action after saving your event in the **After Saving This Event** section.

- Go to Event Details (see the [Viewing Event Details](#) help topics)
- Create Another Related Event (see the [Creating Related Events](#) help topics)
- Create a Related Copy of This Event (see the [Copying Related Events](#) help topics)

15. Save Your Event

Use the **Save** button to complete event creation.

**Warning: The Cancel Button Will Not Save Changes**

The **Cancel** button is always available at the bottom of the Event Form alongside **Preview** and **Save**, but be aware that using **Cancel** will not save any completed fields or changes.

Additional Tips

- When you submit an event with a location or resource that you don't have permission to assign, the Event Preferences area in the Occurrences area of the event details view lets you know that the assignment has been saved as a preference and an assignment task request has been issued for the item.
- When you save an event in the Draft state, any location or resource assignments are saved as event preferences only. The locations or resources themselves are released for other assignments.
- The event reference number is displayed when the event is saved. You can use this later to quickly find the event.