Using 25Live®

Advance 25Live

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Establishing Relationships

• If you have the appropriate security rights, you can create “content” relationships with other events from either of two places in 25Live:
  • From the summary of Event Options displayed when you finish creating or editing an event.
  • When you’re viewing an event currently open on the Events tab by clicking on “More Actions…”
Establishing Relationships

- Establishing relationships helps you and others:
  - Track events that are related in a way that’s meaningful
  - Expand a calendar view of an event to show all its related events
  - Easy reference by clicking on related events on the right-side in the Event Details box when viewing a single event in the Event Details sub tab
  - Run a Related event reports
    - Event Confirmation
    - Event Confirm Estimate
Establishing Relationships

• You can establish a content relationship between events by following the below steps:

1. With one of the events open in any view on the Events tab, choose “Establish Relationships” from the More Actions… menu.

OR

Select the option in the summary of Event Options after creating/editing an event
Establishing Relationships

2. In the form that’s displayed, click on one of the blue links to use one of the drop-down lists to find an event to relate to

- Choose from your Open Events…
- Choose from Starred Events…
- Search for Events…
Establishing Relationships

3. Select the event to link to, then click Add to create the relationship

4. Add more events to the relationship with the current event, as needed

5. Click Finished or the form’s close button when you’re done
Establishing Relationships

• Establishing Relationships Important Notes

  • Each relationship you establish with another event is reciprocal, and adding relationships created for either event are also a simple one-to-one relationship

  • For Example, you might establish relationships from the “Conference” event with “Hosted Breakfast” and “Banquet.” The two latter events are then related to Conference but not to each other, unless you open Hosted Breakfast or Banquet and establish a relationship with the other

  • To cancel a relationship, just click “remove” next to a related event listed at the top of the Establish Relationships form. A relationship may be terminated from either end.
Copy an Event

• To copy an event you must log into 25Live and have the appropriate security permissions
  • If you are unable to access or copy and think you should be able to, contact your system administrator for further assistance
• You can copy events by following the below steps:

1. Find the event you wish to copy and open the event
Copy an Event

2. Click “Copy this Event” in the More Actions… drop-down menu of the far right

• You can also create a copy from the summary of Event Options displayed when you save a new or edited event
Copy an Event

3. In the event editor, go through each tab and field to verify which details you want to retain and which you need to edit for the copy

   - Important Notes Regarding Copying Events
     - Along with many other event details, the dates/times and any location and resource assignments from the original are retained in the event copy, so assignments may be flagged as conflicts with the original
     - Be sure to “touch on” every field to be sure you’re getting the results you want
Copy an Event

4. When you’ve finished making changes, click Finish to save the event and open a set of options for continuing

• **NOTE:** If the original event was starred, the copy is automatically starred
Delete an Event

1. Sign into 25Live with a valid username/password
   • NOTE: You must have the appropriate security permissions to delete an event
2. Open the event that you want to delete on the Events tab
3. Choose “Delete this Event” in the More Actions… drop-down menu on the upper right.
4. Click OK to continue
   • NOTE: When deleting an event it is gone from 25Live with no historical data and all objects will be released
Email Event Details

1. You must sign into 25Live with a valid username/password
2. Select "Email Event Details from the More Actions... menu"

OR right-click an event name in an events, locations, or resources view, or in a list of starred events
3. Complete the Email Event Details Screen
Tasks – Overview of Tasks

• Overview of Tasks allows you to select to view To Do’s, Approval Notifications and Assignment Requests

• **Overdue** – View tasks assigned to you and due today or within the past 30 days

• **Outstanding** – View tasks assigned to you and due within a time span that covers the past 30 days through the next 30 days and not yet completed

• **Flagged** – Tasks are flagged when you have not acted on them yet or because you restored them after acting on them
Tasks – Tasks Agenda

- Tasks Agenda displays a calendar of events with tasks assigned to you
- ONLY Notification tasks assigned to you are displayed
- One can subscribe to agenda via iCal