

CREATING YOUR FIRST 25LIVE REQUEST

A DETAILED GUIDE

TABLE OF CONTENTS

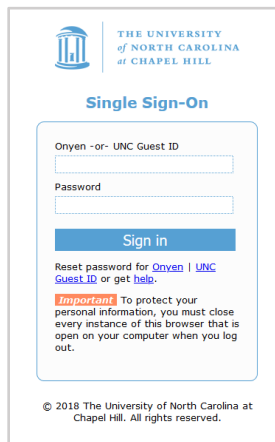
Introduction.....	2
Logging in the First Time	2
Your 25Live Dashboard.....	2
Accessing the 25Live Pro Event Form.....	3
Stepping Through the Event Form	3
Event Name and Event Title for Published Calendars.....	4
Event Type	4
Primary Student Organization or Department.....	5
Additional Student Organization or Department.....	5
Expected Attendance	5
Reservation Description	5
Date and Time	6
Locations	6
Recommended Resources.....	8
Attached Files	9
Event Questionnaire.....	10
Contact Roles.....	10
Additional Information	10
Campus Policy Acknowledgement	10
Post-Save	11
Save Your Event.....	11
Glossary	12
Event Type List.....	12
Setup list.....	13

INTRODUCTION

Thank you for taking the time to learn more about 25Live and how to submit your reservations online. This document highlights aspects of the 25Live scheduling system and it walks you through step-by-step on how to submit a space request.

LOGGING IN THE FIRST TIME

All UNC faculty, staff and students have access to 25Live using their Onyen. When you login for the first time, this action creates your contact card for 25Live. You will not be able to submit reservations until you have completed 25Live training and a 25Live administrator moves your contact card to the appropriate security group which gives you access to reserve space on campus. This process can take up to 48 hours. Please email reservecarolina@unc.edu if you experience issues accessing 25Live.



THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Single Sign-On

Onyen -or- UNC Guest ID

Password

Sign in

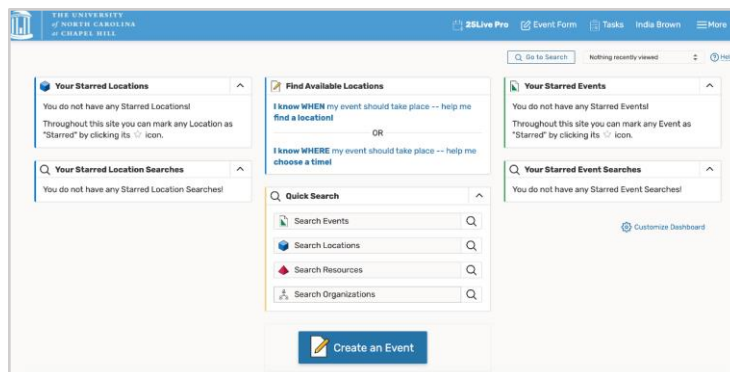
Reset password for [Onyen](#) | [UNC Guest ID](#) or get [help](#).

Important: To protect your personal information, you must close every instance of this browser that is open on your computer when you log out.

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YOUR 25LIVE DASHBOARD

The 25Live Dashboard serves as the Home Screen for the 25Live system and can be used to navigate the entire scheduling software. For a deeper look into your 25Live dashboard, take a look at the *Using Your 25Live Dashboard* document available in the 25Live training resources on ReserveCarolina and Heellife.



ACCESSING THE 25LIVE PRO EVENT FORM

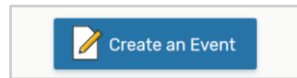
There are many ways to start the event form. Take one of the three following actions to start creating an event:

Use the **Event Form** link in the top navigation bar



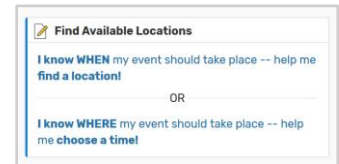
OR


Use the **Create an Event** button on your 25Live dashboard



OR

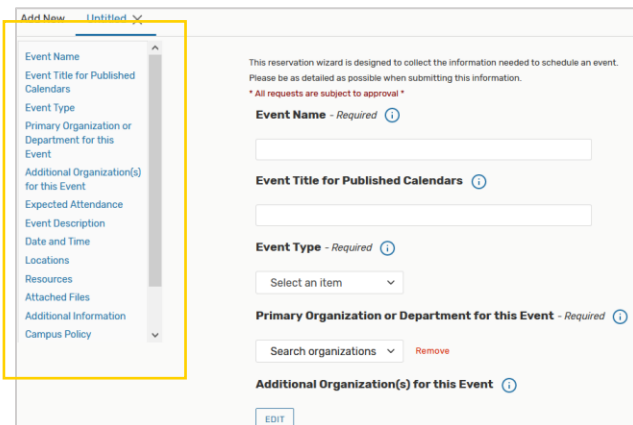
Choose an option in the **Find Available Locations** area of the 25Live home dashboard to start from a required time or location, if that section is present



You can also start the event form after you have identified an available space using the calendar view or availability view just click on the **Create an Event** icon ()

STEPPING THROUGH THE EVENT FORM

As you are navigating through the event form, 25Live features a convenient navigation menu to the left to see what is coming next and easily move around different sections of the event form.



Note: 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.

The **Preview** button is available to see a summary of your event at any time, except during saving. The preview also allows you to jump to different Event Form sections to edit information and settings.

The **Save** button allows you to submit your Event Form after you have completed all required information.

Note: The Save button does not allow you to save and close out the event form to return later.

This reservation wizard is designed to collect the information needed to schedule an event. Please be as detailed as possible when submitting this information.
 * All requests are subject to approval *

Event Name - Required ⓘ

Event Title for Published Calendars ⓘ

Event Type - Required ⓘ

Select an item ▼

Primary Organization or Department for this Event - Required ⓘ

Search organizations ▼ Remove

Additional Organization(s) for this Event ⓘ

EDIT Cancel Preview Save

EVENT NAME AND EVENT TITLE FOR PUBLISHED CALENDARS

Okay, let's get started on the Event Form:

The **Event Name** should clearly describe the event or activity.

The **Event Title** is the formal, public, name of the event. The event title is published on calendars. If there is information that you do not want shared, do not include it in the event title field.

Event Name - Required ⓘ

Please enter a name that clearly describes the event.

Event Title for Published Calendars - Required ⓘ

EVENT TYPE

The Event Type categorizes your event and helps the approver support your event and allocate the appropriate resources. To select an Event Type, click the arrow and choose from the list provided. A descriptive list of Event Types is provided in the glossary of this document.

Event Type - Required ⓘ

Conference ☆ ▼

Q Select an item

- Alternate Classroom ☆
- Banquet/Reception ☆
- Camp ☆
- Ceremony ☆
- Competition/Tournament ☆
- Conference ☆

PRIMARY STUDENT ORGANIZATION OR DEPARTMENT

All UNC departments and registered student organizations are represented in 25Live based on their formal UNC names. If you cannot find the right department or organization please email reservecarolina@unc.edu.

If you are making a reservation for personal use, select the organization name “**Individual - UNC Student/Faculty/Staff**”

The screenshot shows a form titled 'Event Name - Required' with a text input field. Below it is 'Event Title' with a text input field. Then 'Event Type - Required' with a dropdown menu labeled 'Select an item'. Below that is 'Primary Organization for this Event' with a dropdown menu labeled 'Search organizations' and a red 'Remove' button. At the bottom is 'Additional Organization(s) for this Event' with an 'EDIT' button and a 'Create Organization' link.

NOTE: Use the information (i) icon to view additional help and/or instructions for any field that displays it.

ADDITIONAL STUDENT ORGANIZATION OR DEPARTMENT

If there is a UNC department or organization that is co-hosting or sponsoring the event, please list them here. If you are unable to find an organization email reservecarolina@unc.edu or contact the space manager.

EXPECTED ATTENDANCE

This is your anticipated guest count. We recommend that you provide the most accurate count as possible. 25Live can use the expected or registered head count to help find locations that can accommodate your request.

RESERVATION DESCRIPTION

The Event Description can appear on web calendars. No published calendars are currently available. This feature will be utilized in the future. If your event details need to be private from other 25Live users please reach out to the space manager for assistance or email reservecarolina@unc.edu.

The screenshot shows a form with 'Expected Attendance' and 'Registered Head Count' text input fields. Below them is 'Event Description' with a rich text editor. The rich text editor has a menu bar with 'File', 'Insert', 'View', 'Format', and 'Tools'. The 'Format' menu is open, showing options for bold (B), italic (I), underline (U), text color (A), background color (fill), font family, and font size. There is also a link icon at the end of the menu.

DATE AND TIME

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 can describe how it repeats in the next section.
- Click the Additional Time field to add extra time to events. See [Adding Additional Time to Events for more information](#).
- You have the option to create a multi-day event that only occurs once 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, then set the number of days, hours, or minutes needed. (Optional) Choose "How Your Event Repeats" if your event has more than one occurrence, you can choose how the event repeats. 25Live allows you to create repeating events defined as either ad hoc/random dates or as a pattern (daily, weekly, and 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.

LOCATIONS

This is where you select the space for your event. You can search locations by keyword or utilize Saved Searches to select frequently used spaces on campus.

You may request multiple spaces at a time, even spaces in different buildings across campus. If you request multiple spaces across campus, you will not receive confirmation on the reservation until all approvers have reviewed and approved their spaces.

- Check the **Hide Conflicts** or **Enforce Headcount** boxes to narrow results.
- Use the **More Options** dropdown to add additional search parameters, such as Categories, Features, Layouts, and Capacity.

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

- Use the Conflict Details link to view more information about location conflicts.
- The links on location names allow you to view location details.

Reserve	GSU-2200	Carolina Union, Art Gallery	120	1/1	None
Reserve	GSU-2300	Carolina Union, Great Hall	600	1/1	None
Reserve	GSU-2401	Carolina Union, Auditorium	385	1/1	None
Reserve	GSU-2518 AB	Carolina Union, 2518 AB	80	1/1	None
Reserve	GSU-3206 AB	Carolina Union, 3206 AB	100	1/1	None
Reserve	GSU-3408	Carolina Union, 3408	120	1/1	None
Reserve	GSU-3411	Carolina Union, 3411	110	1/1	None

Once you select a location, you can select your preferred layout (if applicable) and provide instructions and expected attendance numbers. This feature is especially useful for conference breakout rooms. A list of the varying layout types is provided in the glossary of this document.

GSU-3206 AB

Carolina Union, 3206 AB

Capacity: 60

Date

Time

Conflicts

Layout

Instructions

Attendance

Thu Jul 16 2020

9:00 am - 10:00 am

Workshop (60)

Remove

View Occurrences

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

ARTS 102

Add to favorites

Location Title: Davis Arts Center - Practice Room 2

Capacity: 5

Remove

View Occurrences

WPN 110

Date

Time

Conflicts

Included

Shared

Instructions

Attendance

Layout

Set For All

20

Sat Sep 14 2019

2:00 pm - 3:00 pm

25

Classroom Rows

Wed Dec 04 2019

2:00 pm - 3:00 pm

20

Custom

Wed Dec 11 2019

2:00 pm - 3:00 pm

35

Classroom Rows

Wed Dec 18 2019

2:00 pm - 3:00 pm

20

Custom

Close

RECOMMENDED RESOURCES

Many spaces in our 25Live system have resources that can be utilized in conjunction with a request. If resources are recommended, a list will appear in this section that you can select to enhance your event. Some resources are required for certain spaces, like staffing, and may be added when your request is reviewed. Check with the space manager if you have questions about resources.

Use the **Reserve** (or **Request**) button to make selections. You may choose one or more available resources for your event. Columns are also displayed for Stock Total and Availability. Additionally, the links on resource names

Resources

Resources Search

Auto-Load Starred:

No

Yes

Your Starred Resources

Your Starred Resources

Reset Search

Add

Name

Quantity Available

Conflict Details

1

Reserve

AV - DVD Player

5 / 5

None

1

Reserve

AV - Laptop - Mac

15 / 15

None

1

Reserve

AV - Microphone - Hand Held with Cord

5 / 5

None

allow you to view resource details. If visible, use the **Conflict Details** link to view more information about resource conflict

EDITING RESOURCES:

25Live allows you to adjust settings per occurrence for each requested or reserved resource or equipment. 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 [Adjusting and Editing Individual Event Occurrences](#) help topic.



ATTACHED FILES

You may upload up to 5 files, see details below. Recommended files include: detailed event timeline, event flyer, itinerary for your presenter, signed service agreement, diagram of event space, etc.

- 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

EVENT QUESTIONNAIRE

Select and enter values for any visible custom attributes that are pertinent to your event. Use the No/Yes toggle(s) to add and complete any custom attributes. If you do not see any questions, you may have not selected an Event Type above. Additionally, some Event Types may not require additional questions.

Event Questionnaire ⓘ

Please answer any and all questions applicable to this event.

- Is this event open to non-UNC Students, faculty, staff or community members?
No ☐ Yes ☐
- Are non-UNC students under the age of 18 invited?
No ☐ Yes ☐
- Is there a keynote/speaker or vendor presenting? Please provide their name in Additional Information.
No ☐ Yes ☐
- Is this activity involving political officials (prospective, current, or past), campaign activity or voter registration?
No ☐ Yes ☐
- Will you use any third-party vendor(s)? Please provide the company(s) name in Additional Information.
No ☐ Yes ☐

CONTACT ROLES

Select the contacts associated with the event. To specify a contact, use the dropdown icon then enter a few letters of the contact's name. If their name does not appear it may mean they do not have a contact card in 25Live. You can ask the individual to login to 25Live and this will create their contact card. Or you can

Contact Roles - Required ⓘ

Requestor Boykin, Victoria ⓘ	Scheduler Boykin, Victoria ⓘ	Advisor Search contacts ⓘ
Billing Contact Search contacts ⓘ	Day Of Contact Search contacts ⓘ	

Create

temporarily create their contact using the Create button then completing the displayed fields.

ADDITIONAL INFORMATION

In this section it is helpful to add additional information the approver should know about your event that may not be included in the event description. This is a great place to summarize your event timeline or information about a guest presenter or vendors. This information is visible to you and the approver, but will not populate on calendars.

CAMPUS POLICY ACKNOWLEDGEMENT

You must check the box below the Campus Policy Acknowledgment in order to save your Event Form. We recommend reviewing all relevant policies for the location or resource you are reserving prior to completing the Event Form.

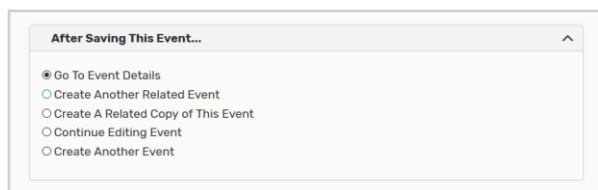
Campus Policy Acknowledgement - Required

By checking this box, I acknowledge that as the requester I am responsible for reviewing and following all relevant University and space policies that pertain to the spaces reserved in this event form. Saving this event form does not guarantee the use of any space or resources. Campus spaces may require signatures on their service agreement prior to confirming the use of space.

☐ I agree

POST-SAVE

Convenient options are presented to allow you to choose your next action after saving your event in the **After**



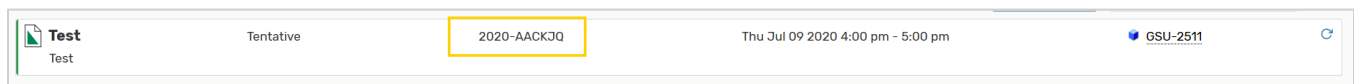
Saving This Event section.

- **Go to Event Details** takes you to the current reservation after you click “Save”.
- **Create Another Related Event** saves your event and returns you to the top of the Event Form to complete the form again for another request that is related to the previous one.
- **Create a Related Copy of This Event** copies all the event details. You can adjust the copied reservation after saving your first request.
- **Create Another Event** takes you to the top of the event form. This event will not be connected to your previous request.

SAVE YOUR EVENT

Use the **Save** button to complete event creation. Your event will then be reviewed by the manager(s) of the requested location(s). **All requests are saved as “Tentative” you are not guaranteed use of a space until you receive a confirmation form the location manager.**

The event reference number is displayed when the event is saved. You can use this later to quickly find the event. When contacting the location manager regarding your reservation, please include this number.



GLOSSARY

EVENT TYPE LIST

Banquet/ Reception: a banquet or pre/post event reception in a space.

Camp: events that utilize multiple meeting rooms and/or large event spaces that may engage participants under the age of 18. Camps may also have on campus overnight accommodations.

Ceremony: awards ceremonies, pinning ceremonies, graduations, or other events for distinction. If the ceremony will be serving a fully catered meal, the event should be characterized as a Banquet/Reception.

Competition/Tournament: Events that contain any form of competing, outside of performances, would be considered a competition/tournament. This event type may involve non- UNC attendees and an entry fee. Example include academic and E-sport tournaments.

Conference: an event that utilizes multiple meeting rooms and/or larger event spaces. Most conferences utilize three (3) or more rooms and may last one (1) or several days, having a significant impact on the building.

Exhibit: showcasing art, research, or other items publicly.

Information Fair: vendors showcasing different information in a space while attendees can walk around and speak with the different vendors.

Lecture/Speaker: an event that has a lecturer or speaker as the focus of the event. Examples can include academic presentations, political speakers, or other known speakers.

Meeting: simple reservations with either members of a UNC organization or department as attendees, with some open to non-UNC attendees.

Movie Screening: This event type involves a showing of a film or show and is usually coupled with a discussion or Q & A session.

Performance: any performing art showcase or demonstration, usually involving lighting, music, and staging aspects. Examples include acapella concerts, dance showcase, comedy skits, and pageants.

Promotions: exterior space reservations that involve the promotion of an organization or department. Promotions often involve student organization fundraisers or information tables.

Rehearsal: common before performances and may be needed prior to the time of the performance. Usually held in spaces such as the rehearsal space or a cleared meeting room.

Religious Service: a ceremony having religious meaning

Rental Only: used to just request rental equipment, no space is needed.

Road Race: 5Ks or other road races that take place on or around campus.

Social Mixer: a gathering that is not business related that may request to serve alcohol.

Training/Workshop: characterized by instruction, collaboration, and working groups. Usually held in spaces that provide a workshop setup with accessible technology.

SETUP LIST

As Is: Space is setup as is, with no requested changes or additions.

Banquet: Tables are arranged with six (6) seats around the perimeter. Tables are spaced to allow room between each and are in rows.

Classroom: Tables are connected in rows with two (2) chairs behind each table. One (1) table is placed in the front of the room with two (2) chairs.

Cleared: There is no furniture in the room.

Conference-Closed: Tables are arranged in a square with chairs around the outside of the square.

Conference-Open: This is a conference set with one side of the square left open, in U-shape. This open side generally faces the projection wall and is ideal for giving presenters more room to operate in.

Discussion Circle: A circle of chairs with an open space to enter and exit. No tables are included.

Lecture: Rows of chairs are set up in rows based on the capacity of the space. A table with two (2) chairs is set at the front of the room.

See Diagram: When space manager has created a diagram for the space, the reservation occurrence will reflect this setup type. The diagram will be added to the reservation.

Special Setup Request: This is used when a client has special directions for a room setup. This can include the addition of extra furniture, the re-arrangement of furniture in a room, or the removal of furniture. When this setup type is added to a reservation, the Reservations staff are responsible for entering accurate setup notes for the operations staff. It may be helpful to draft a diagram.

Standard Set: This setup indicates that the furniture is in a pre-determined setup and cannot be changed. This setup can range from one (1) table and two (2) chairs to a lecture setup.

Workshop: Multiple tables are placed in columns with four (4) chairs at each table. There is an aisle between the columns and sides of the tables. One (1) table is placed in the front of the room with two (2) chairs.