

# **Event Planning and 25Live Training**



# **Office Overview**



### What We Do

- Scheduling
  - Triaging/processing/approving 20,000+ requests per year (not including courses or athletics)
  - Working with other departments to plan maintenance, take spaces offline for renovations, etc.
- Coordinating
  - Connecting with service providers
  - Renting furniture
  - Set-up diagrams
  - Billing for rentals and custodial details
- On-site check ins
- Post-Event Surveys and Follow-up

### **Meet the Team**

- Bill Battelle Director
  - Commencement, conferences, other large/complex events
- Amy L'Heureux Event Planner
  - Student events
- Suzette Santiago Event Planner
  - Non-academic department events
- Dawn Marttila Event Planner
  - Academic department events

- Hannah Poirier Operations Manager
  - Manages 25Live, training, and troubleshooting
  - Not an event planner ©
- Student Workers
  - Simple event confirmations and on-site event check ins

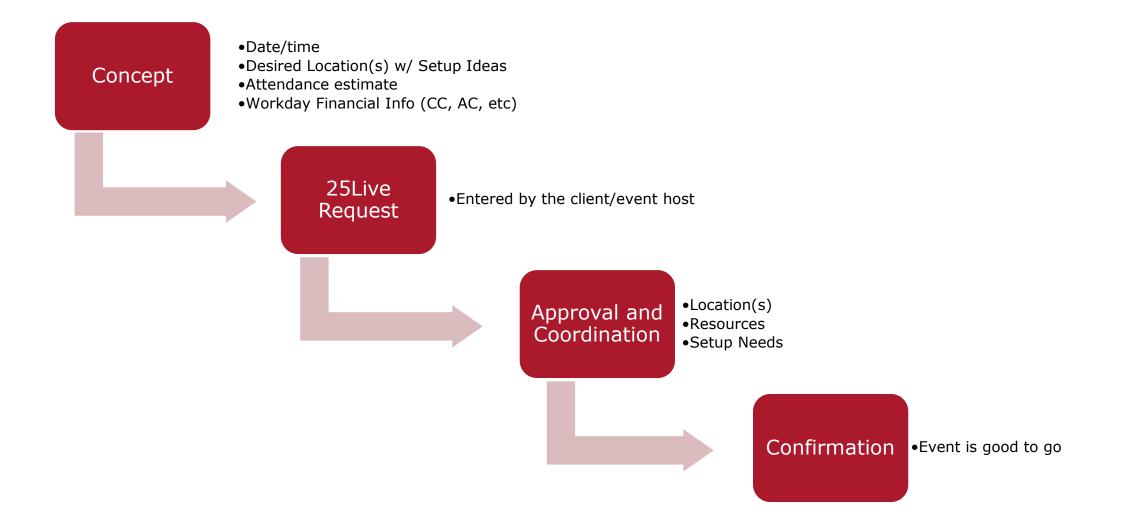


Don't know who to ask? Ask us all! Email <u>events@wpi.edu</u>

# **Requesting and Planning an Event**



### **Event Process**



## **Requesting an Event in 25Live**

- 25live.collegenet.com/wpi
  - Bookmark it!
  - Big red button on 25Live webpage
- Log in
  - Staff/faculty need to email <u>events@wpi.edu</u> to be moved into the employee requester group



Not logging in will prevent you from seeing certain locations in your searches or accessing the event form. Make sure you're logged in!

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## **Requesting an Event in 25Live, cont.**

- Event Form (top right)
- Fill out all required fields
  - Event Name
  - Date/Time
  - Headcount
  - Location
  - Event Type
  - Sponsoring Dept/Org
  - Description
  - Additional Questions
  - Affirmation

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Event Name Event Date and Time How many people are you expecting		form with as much detail as possible in order to red vigating 25Live, please see our training material ar			
to attend? Which location(s) would you like to hold your event?	Staff/Faculty: Please ema needs to be updated, and that	I events@wpi.edu if this is the first time you are re is a manual process.	questing an event. Your access		
What type of event are you having?	Event Name - Required				
Sponsoring Organization		elp you differentiate this event from other events yo you have an event happening more than once, plea			
Please include a sentence or two describing your event.	the same request.	· · · · · · · · · · · · · · · · · · ·			
Do you have additional documents you would like to include?					
Please include any information about	Event Date and Time - /	Required (i)			
your event that may be relevant for coordinators to be aware of.		d time you will advertise for your event. The time yo			
Your request is almost complete!	calendar).	ntered in the Pre-Event/Post-Event Time fields in A	dditional Time (above the		
Please note some important information before you continue.		eed to go through the Center for Well-Being. Ple	ase connect with them		
momator before you continue.	separately. Blackout dates: If a date y	rou would like to request is blacked out, you can red	mest by using the Blackout		
	event type and choosing E	lackout as your requested location. An additiona	al question will pop up to input the		
	actual location you would li require no resources or set	ke to use. Please keep in mind that these requests	are intended for events that		
		major religious holidays that may fall on the date	of your request.		
	For assistance with reques	ts including multiple dates, please see our tutorial .			
	Sun Sep 24 2023				
	8:00 am				
	To:				

## **Requesting an Event in 25Live, cont.**

- Event Details page
  - Proof of submission
  - Event Reference number
  - Current state
- Automatic email w/ reference number as well
- Begins approval process

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## **Approval and Coordination**

- Be on the lookout for emails from your event coordinator!
- Approval queues
- Factors affecting approval speed:
  - Complexity of event
  - Time of year
  - Location
    - Not all spaces route to Events Office for approval
- Resources go to service providers for approval
- Weekly service provider meetings

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(Scheduler view)

### **Other Items of Note**

- Certain decorations are **not** permitted at on campus events
  - *i.e.* open flame candles, glitter, confetti
- The maximum capacity of a room is usually based on no furniture
  - The more extensive of a set up you need, the less people can fit
- Set up information should be finalized two weeks in advance of the event
  - If you request changes to an event with less than ten (10) business days' notice, changes are not guaranteed
  - Staff and resource support is scheduled out in advance and major changes are difficult once schedules have been made



Full policies and guidelines on our website <a href="https://www.wpi.edu/offices/events-office/policies">https://www.wpi.edu/offices/events-office/policies</a>

## **Unique Dates**

- Blackout Dates
  - Holidays where the school is closed
    - No staff, no classes
  - Major University events
    - Resources/staff stretched thin additional resource/labor requests cannot be accommodated
  - New blackout intake request process in the 25Live Event Form
    - Event Type: Blackout
    - Location: Blackout
    - Additional question for requested location will populate

- Wellness Days
  - Built into the academic calendar
  - No classes, no assignment due dates, no non-critical lab work, and no meetings held on these days
  - Should be requested through the Center for Well-Being, not through 25Live
    - Link in event form
  - CWB approves activity, Events Office coordinates space

### **Scheduling Timeframes**

Timeframe	25Live Opens
A+B Terms (up to Winter Break)	Spring (Apr/May)*
C+D Terms (through May)	Fall (Oct)
Summer (up to NSO prep)	March

\* Event spaces only until August 1

## **25Live Access Levels**

### **Default Access**

- All new accounts are given default access
  - Limited event types, locations, and organizations
  - Extra restrictions
- Access updates are manual
- No updates without an account (Log in!)
- Staff/faculty: Contact <a href="mailto:events@wpi.edu">events@wpi.edu</a>

### **Default Access**

- All students have access to book spaces for academic purposes and personal meetings
  - Event Types
    - Study Session/Review
    - Projects
    - Meeting
    - Blackout
  - Sponsoring Org
    - Non-Sponsored Academic
    - Projects
    - Non-Sponsored Individual
- Requests to reserve space for a student organization without the right access will be denied
- Requests need to be made at least 3 days in advance

### **Student Org Access**

- Limited to a small number of group members
  - Core exec. Officers (Pres., VP, secretary, treasurer)
    - Reviewed each term
  - RAs and CAs
  - Select additional designees
    - Up to seven (7) per group, identified by the group president
- Required to watch training videos and pass a quiz every year
  - Link to quiz only provided in email to qualifying members
  - Passing = 100%, can be retaken as many times as necessary
  - Access reset every summer
- Can only request for groups under which they qualify
  - Requests for other groups will be denied
- Personal/academic requests should not be requested under the group org
- Requests need to be made at least 3 days in advance

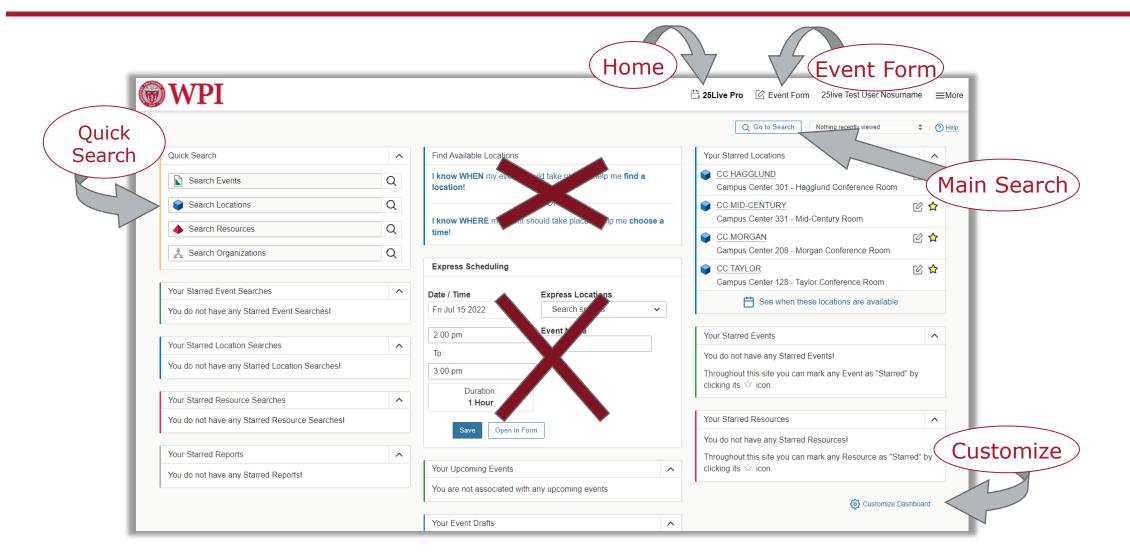
## **Staff/Faculty Access Levels**

- Requester Access
  - Most employees will have this level
  - All requests will route to an approval queue
- Assign/Unassign Access
  - Allows for the ability to book certain locations without the need for approval
  - Limited mostly to departments who don't have their own meeting spaces
  - Other locations still need to be requested and approved
    - Should only confirm events for those specific locations, requests need to stay Tentative
- Location Approvers
  - Some departments have conference rooms or other spaces that they manage approvals for instead of the Events Office, Academic Scheduling, or Athletics
  - Other locations still need to be requested and approved
    - Should only confirm events for those specific locations, requests need to stay Tentative

# **Navigating 25Live**



### Dashboard



### **Searches**

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### **Calendar View**

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### **Availability View**

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### **Availability View, cont.**

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### **Availability Weekly View**

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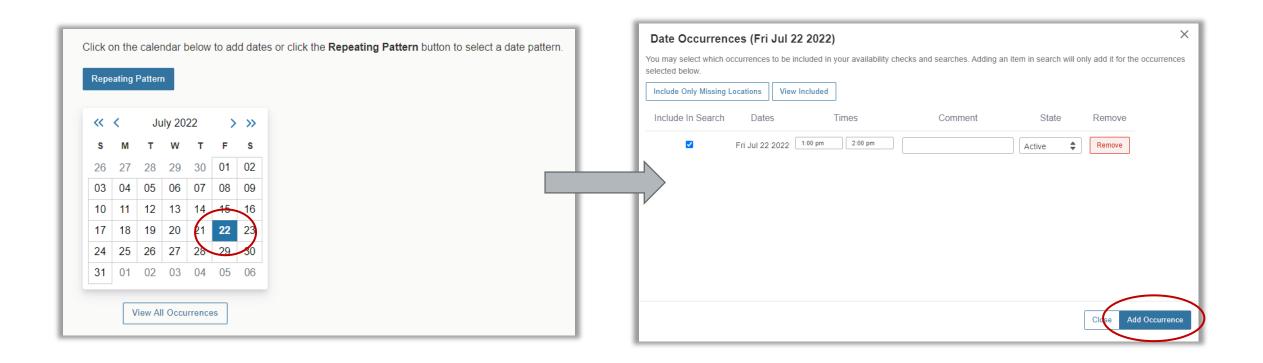
# **Tips and Tricks**



### **Putting Multiple Occurrences on One Request**

	Pattern Picker
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Click on the calendar below to add dates or click the <b>Repeating Pattern</b> button to select a date pattern.	Repeats through Fri Jul 22 2022 Pattern Picker Choose how you would like this to repeat Weekly  Repeats every
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View All Occurrences	<ul> <li>Repeat by Position Add Repeat Position</li> <li>Repeats through</li> </ul>
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### **Putting Multiple Occurrences in One Day**



### **Event Form Location Search**

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### **Finding Events You've Submitted**

		Select	Object: 👔 Events 🗸 Saved Search	hes (optional) 🗸
			Q Saved Set	arches (optional)
Your Upcoming Events	~	Quick Search Advanced	Pre-Def	fined Groups
		Search Events	Featured Events	
1 Event in which you are the <b>Requestor</b>		Hint! Type :: to use SeriesQL.	Your Starred Eve	
<u>1 Event</u> in which you are the Requestor		0		Starred Locations Reset   Save As
		Organizations + Types + Categories + S	States +	bur Starred Resources
1 Event in which you are the Scheduler			Events Sponsor Organizations	red By Your Starred
			Events You Have	re Requested
			Events You Are	Scheduling
			Events in which	you are the Instructor
<b>WPI</b>		1 Event Form 25	5live Test User Nosurname	you have an additional Future Only All Dates
				i Have Requested
		Rec	ently Viewed V 🥑 Help	
s	Select Object: 👔 Events 🗸 Events You H	lave Reque V		
Events You Have Requested				
		Reset Searc	ch	
List Calendar	← Future Only →	Future Only All Dates Chi	oose Columns 📿 🍞 Help	
	,			
1 Matching Events				
Name V Title – Reference – Organizati Type – ons	Categories Your Role Start Date - S	Start Time Creation – State – Locations Resources Date	s Scheduler – Requestor	
Test 2022- EVENTS Meeting	Requestor, Mon Dec 19 9		25live Test 25live Test	
ABQLAG OFFICE	Scheduler 2022	2022 9:43 am	User User Nosurname Nosurname	

## **Finding Events Your Group Has Submitted**

<b>WPI</b>			다 25Live Pro 🕜 Event Form 25live	e Test User Nosurname	pre							
			Recently	Viewed Viewed	<u>P.</u>							
	Select Object:	Drganizations 🗸 Saved Searches (optional)	~									
	Quick Search Advanced											
	events		× 0	)								
	⊕ Hint! Type :: to use SeriesQL.		Search has not been saved Reset   Export Results   Save As Search									
	Types + Categories +			I								
List Calendar	Display Additional Time	← Sun Jul 17 2022 - Sat Jul 23 2022	→ 🗑 WPI						🛱 25Live	Pro 🛛 Event Form	25live Test User	Nosurname ≡More
Sunday	Monday Tuesday uly 17 18 19	Wednesday Thurs	day							Q Go to Search	Recently Viewed	✓ ⑦ Help
	1:00 pm - 2:00 pm Event Service Provider		<sup>↑</sup>									
	Meeting		Events Office									
<del>~</del>												
×.			Details List Cale	endar								
			1									
								← Fri Jul 22 2022	2 - Wed Oct 19 2022	→ Days: 90 🗘	Choose Colun	nns C 🧿 Help
			15 Matching Reservations									
			Event ~ Title	– Reference –	- Expected Head - Count	Organization	Occurrence Date -	Setup Start	Pre-Event Start	Event Times	Post-Event End	Takedown End
			25Live Staff	2022-ABQLBM	50	EVENTS OFFICE	Thu Aug 18 2022		10:00 am	10:00 am - 11:30 am	12:00 pm	
			Training									
			25Live Staff Training	2022-ABQLBM	50	EVENTS OFFICE	Thu Aug 18 2022		2:00 pm	2:00 pm - 3:30 pm	4:00 pm	

### **Advanced Searches**

WPI	<b>WPI</b>
Select Object: 👔 Events 🗸	Select Object: 📦 Locat
Quick Search Advanced	Quick Search Advanced
Add Criteria	Add Criteria
Add Group	Add Group
Nour Starred Events	K Your Starred Locations
General	General
Keyword	Keyword
Events •	Locations
Folders	Partitions
G Cabinets	Features
Create Date	Categories
Event Types	Layouts
Event States	Relationships
Å Organizations	Custom Attribute

- More specific than just "starred" locations
- Combine searches for efficiency

### **Express Scheduling**

te / Time	Express Locations
1on Jul 25 2022	Search spaces ~
1:00 am	Event Name
O:	
2:00 pm	
Duration:	
1 Hour	

- Designed for spaces that never need any setup/support
- Requests auto-confirm
- Only applicable to certain locations around campus
  - Hoteling offices
  - Some lab spaces outside of classes

### I Know WHEN/WHERE My Event...

nd Available Locations	
now WHEN my event should take place help me fin OR	d a location!
now WHERE my event should take place help me c	hoose a time!
Find Available Locations	• •
Enter the desired date and time for Date: Mon Jul 25 2022 Choose Date Template 3:00 pm To: 4:00 pm Number of Attendees: (r	required)
Search within: Select a Location	on Search
	Find Available Locations
	Find Location by Name: Go
	Don't know the exact Location? Search by Location Groups

 Doesn't always show everything available

←

 Only looks at a narrow timeframe and attendance count

### **Dark Mode**

