How to Request Space in 25Live

 Go to <u>https://25live.collegenet.com/pennmedicine</u> and log in using your Penn key and password. SES uses Google Chrome.

2) Getting Started with 25Live

- a) Starred Items (Favorites)
 - i) In 25Live you can mark your frequently used details as 'Starred' to quickly find them in the future. You can star your organization, locations, event types, and event equipment.
 - ii) To star an item, click on its star icon, which will turn yellow.
- b) Using the quick search to find Locations. Resources, and your Organization

| Quick Search | ^ |
|------------------------|---|
| Search Events | Q |
| i 701 | Q |
| Search Resources | Q |
| A Search Organizations | Q |

i) Search Locations - please star any locations that you frequently request

| | Name — | Formal Name — | Categories |
|----|--------------|---|--------------------|
| 7 | BLK 0701+ | Blockley 701 Brian L. Strom Conference Rm+ | Conference Room |
| | BRB 0701+ | BRB 701 Conference Rm+ | Conference Room |
| 67 | SCL 0701+ | Stellar-Chance 701 Conference Rm+ | Conference Room |

- ii) Search Resources
 - To access the fixed in space AV easily, star "Standard In-Room AV Equipment"

AV: Auditorium Standard AV Equipment

AV: Standard In-Room AV Equipment

Please request AV whenever you will need it.

- If you frequently request other resources, please star them.
- iii) Search Organizations Star your department
 - If you have trouble locating your organization, please try typing fewer characters or phrases

• Words may be abbreviated, 'Ctr' instead of 'Center', for example

| | Name | Title |
|---|--|----------|
| ☆ | Ctr for Adv Retinal & Ocular Therapeutic | CAROT |
| ☆ | Ctr For Aids Research | CFAR ADM |
| ŵ | Ctr for Cellular Immunotherapy | CCI |
| ☆ | Ctr for Clinical Epid & Biostatistics | CCEB |

- c) Once you have starred an item, it will appear on your dashboard.
 - i) If this does not immediately appear be sure to refresh the page.

| Your Starred Locations | ^ |
|-------------------------------------|-----|
| BRB 0701+ BRB 701 Conference Rm+ | 🖒 🕁 |
| See when these locations are availa | ble |
| Your Starred Resources | ^ |
| AV: Standard In-Room AV Equipment | 🖒 🞝 |
| | |

- ii) Clicking on "See when these...are available" will search for your starred locations or resources.
- iii) For future requests click on a starred location to search for that location.

3) How to request starting with a space

a) To access the Event form, start by searching for a space in the Locations Quick Search.



- i) You can search by building or room number
- ii) If you have trouble finding the location you are looking for, try typing fewer characters.

4) Other Starting Options

- a) If you are not looking for a particular space, but know you will need access to specific event or AV resources, you can begin this process using the Resource Quick Search. All other steps are the same.
- 5) On the next page switch to the "Availability" View, click on the date, and select the first date you wish to schedule. (See 5.a.ii for scheduling multiple dates)

| | Select Object: 📦 Locations 🗸 Sa | red Searches (optional) | |
|--|-----------------------------------|------------------------------|---------------------------|
| Quick Search Advanced | | | |
| brb 701 | | | × 🥐 |
| (i) Hint! Type :: to use SeriesQL | | Search has not be | en saved |
| | | Reset Save as | Search |
| Categories + Features + | Layouts + Capacity between and | Buildings + | |
| List Calendar Availability Availability Weekly | Include Requested | hu Feb 13 2025 → Separated 🗘 | Options Legend C (?) Help |
| 7AM 11PM 7 8 | 9 10 11 12 1 | 2 3 4 5 6 7 | 8 9 10 |

a) When you click on the date a calendar will pop up and you can navigate to the start date you want.



b) When you hover the mouse over the calendar a pencil icon will appear if you can request that day and space. Click on the time you want to request to go to the event form.



- 6) Fill out the fields in order. You must fill out required fields to save your event.
 - a) Select the Date and Time Required
 - i) Please review that the date and time are accurate
 - ii) Repeating Pattern
 - The date and time selected above must be the first date of this series.

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



 Click on the Repeating Pattern button and select a pattern: Ad hoc, daily, weekly or monthly.

| Pattern Picker | | X |
|---|--------|----------------|
| Choose how you would like this to repeat Weekly | | |
| Repeats every | | |
| week 🗢 | | |
| Repeats on Sun Mon Tue Wed Thu 🖌 Fri Sat | | |
| Repeats through | | |
| Fri Mar 14 2025 | | |
| ○ Ends after 1 iterations | | |
| | Cancel | Select Pattern |

- Fill the Pattern Picker as needed based on how the event will repeat.
- Once the pattern has been selected you will see your events highlighted on the calendar below

| _ | | _ | | | | | | |
|----|----|--------|--------|---------|----|----|--|--|
| S | М | т | w | т | F | S | | |
| 23 | 24 | 25 | 26 | 27 | 28 | 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 | | |
| | | | | | | | | |
| | | lanade | 2 Occu | ILLENCE | | | | |

iii) Manage Occurrences

•

| nclude Only N | Aissing Location | ns Include | Only Missing Resources | View Included + A | dd Occurrence | | |
|----------------------|--------------------|--------------------|---|-------------------|---------------|-----------------|--------|
| Include In Search | Dates | Times | Extra Times | Comment | State | Locations | Remove |
| V | Mon May 05 2025 | 8:00 am 9:00 am | Setup Time - May 5, 7:45 AM <u>Takedown Time</u> - May 5, 9:15 AM | | Active 🗘 | ● BRB × 0901+ × | Remove |
| | Mon May 12 2025 | 8:00 am 9:00 am | <u>Setup Time</u> - May 12, 7:45 AM <u>Takedown Time</u> - May 12, 9:15 AM | | Active 🜲 | BRB × 0901+ × | Remove |
| V | Mon May 19 2025 | 8:00 am 9:00 am | <u>Setup Time</u> - May 19, 7:45 AM <u>Takedown Time</u> - May 19, 9:15 AM | | Active 🗘 | BRB × 0901+ × | Remove |
| V | Mon May 26 2025 | 8:00 am 9:00 am | <u>Setup Time</u> - May 26, 7:45 AM <u>Takedown Time</u> - May 26, 9:15 AM | | Active 🜲 | ● BRB × 0901+ × | Remove |

Selecting this button will display all on your dates

- If you need to adjust the times on a single date you can do so on this page
- If a date in the pattern will not be held you can click 'Remove' to cancel just that occurrence
- + Add Occurrence will allow a single date to be added to the reservation.
 - Be sure the date shown is correct as it will default to the current date. Incorrect dates cannot be edited and will have to be removed and added again

b) Expected Attendance - Required

i) Enter the expected attendance for the event.

c) Event Type - Required

- i) Select the most appropriate event type from the drop down
 - You can star the event types that you use most frequently so that they will appear at the top of the list the next time you open the request form

d) Locations - Required

- i) If this field is not already filled out then use the Locations Search to pick a space.
- ii) For Repeating Patterns
 - If the space is not available on all dates a conflict alert will show

| 🔮 STM 213+ st | emmler 213 Conference Room+ Capacity: 22 |
|---------------|---|
| Remove | View Occurrences |
| Conflicts | on: 19 2025 |
| View All C | Conflict Details |

• 'View all Conflict Details' will show what the problem is. If you want to stay in this space, you can change the time for this date to accommodate the preexisting event

| | Conflicts on: | |
|---|-----------------|--|
| • | Mon May 19 2025 | • STM 213+ KATZEN LAB MEETING 10:15 am - 11:45 am |
| 4 | Mon May 26 2025 | STM 213+ Blackout: Memorial Day (Overridden) 12:00 am - 11:59 pm |

• Additionally, you can select 'View Occurrences'

| STM 213 | STM 213+ | | | | | | | | |
|--------------------|-----------------------|-------------------------------|----------|--------|---------------------------------|--------------|------------|--|--|
| Date | Time | Issues | Included | Shared | Layout | Instructions | Attendance | | |
| Set For All | | | | | • | | | | |
| Mon May 05 2025 | 9:00 am - 10:00 am | | | | Boardroom Style (22) 🗘 Preview | | | | |
| Mon May 12 2025 | 9:00 am - 10:00 am | | | | Boardroom Style (22) 🗘 | | | | |
| Mon May 19 2025 | 9:00 am - 10:30 am | Conflic t ≁ Details | | | Boardroom Style (22) Preview | | | | |
| Mon May 26 2025 | 9:00 am - 10:00 am | Conflict Details | | | Boardroom Style (22) Preview | | | | |
| | | | | | | | | | |

- Removing the check from the box next to the conflict will remove the location from this date in your pattern
- To add a space to the conflict date, return to the 'Manage Occurrences' button in the **Date and Time** section

 \sim

All Date Occurrences

You may select which occurrences to be included in your availability checks and searches. Adding an item in search will only add it for the occurrences selected below.

| Include Only Missing Loc | ations Include Only M | issing Resources | View Included | + Add Occurrence | |
|--------------------------|---|----------------------------------|-------------------------------------|---------------------------|----------|
| Select ' and select | Include Only Missing ect 'Refresh'. Then s | Locations' at th | e top, then retr ative locations | urn to the Locatic | n Search |
| | STM 213+ sta Included dates: Mon May 05 2025 | emmler 213 Con , Mon May 12 2 | ference Room+ 2025 | | |
| | Remove | View Occurrent | ces | | |
| | RCH B102AB* Included dates: Mon May 19 2025 | RCH B102AB | Seminar Room | * | |
| | Remove | View Occurrence | ces | | |

• Once the space is added the locations will show the dates attached and the conflict should be gone.

e) Additional Event Information - Required

- i) Once all required fields are filled out this section will appear. Please answer all questions applicable to this event.
 - Will food be served at this event? Yes/No
 - ♦ If yes: Do you need additional tables for food setup? Yes/No
 - ◊ Provide caterer Information and arrival time.
 - Preferred Catering options to choose from: <u>Catering@Penn | Penn Procurement</u> <u>Services</u>
 - Will alcohol be served at this event? Yes/No
 - (i) If Yes: Initial: I have read, understand and will comply with University Alcohol and Drug Policy <u>https://catalog.upenn.edu/pennbook/alcohol-drug-policy/</u>
 - Is this event sponsored by PSOM or HUP and are a majority of attendees PSOM or HUP Faculty/Students/Staff? Yes/No
 - If no, you need to confirm that you understand that additional fees apply to external
 - Pursuant to HIPAA regulations I will be sharing patient health information outside of PSOM/HUP. Yes/No
 - 26-digit Budget Code / 11-digit Lawson #
 - ◊ This is required for all events regardless of equipment or service needs.
 - Please only provide one option. If you intend on splitting the cost of the event between two or more budgets this will need to be settled between those entities privately as our department can only charge to a single account

f) Resources

i) Select resource(s) you want to request for your event from your list of starred resources or search by resource name. You may request multiple resources.

- Note: If the search does not return the expected result, try limiting the search term to a key word in the resource name.
- ii) Please note the system will automatically apply specific resources to certain spaces. If you see a resource that you did not request this is why.
- iii) If you have a request with multiple dates these resources can be applied to all occurrences
- iv) If information needs to be provided like with Catering details, you can add this to all dates using the 'View Occurrence' on the related resource. Then add the information in the 'Set for All' row and the details will apply to all occurrences with the blue check

| Catering: Caterer Arrival Time | | | | | | | |
|-----------------------------------|--------|--------------|--------------|----------|-----------|-------|--|
| Date Time | Issues | Included | Instructions | Quantity | Available | | |
| Set For All | | | 9:00am | | | | |
| Mon May 05 2025 9:00 am - 10:00 a | am | \checkmark | 9:00am | 1 | Unlimited | | |
| Mon May 12 2025 9:00 am - 10:00 a | am | \checkmark | 9:00am | 1 | Unlimited | | |
| Mon May 19 2025 9:00 am - 10:30 a | am | \checkmark | 9:00am | 1 | Unlimited | | |
| Mon May 26 2025 9:00 am - 10:00 a | am | | 9:00am | 1 | Unlimited | | |
| | | | | | | Close | |

g) Event Name - Required

i) Enter a name that clearly describes the event, using ALL CAPS. There is a 40-character limit, including spaces.

h) Publish to Calendar

i) Please check box to have your event displayed on the <u>PSOM Events Calendar</u>.



ii) Event Title for Published Calendars

 The Event Title for Published Calendars will replace the Event Name on the <u>PSOM</u> <u>Events Calendar</u>. There is a 120-character limit, including spaces.

i) Primary Organization - Required

i) Select the Organization/Department responsible for the event by searching for the organization name. If the search does not return the expected result, try limiting the search term to a key word in the organization name.

j) Event Agenda

i) If you have an Agenda for your event, please upload it here.

k) Terms and Conditions - Required

 By checking this box, you confirm that you understand the following: A room request does not guarantee space. This is not confirmation of a room reservation, but that Scheduling & Event Services will receive and process your request. Scheduling & Event Services will contact you regarding your request within 3 business days.

7) SAVE

- a) Once you have reached the end of the form you will need to save the request.
 - i) If a required field is not filled in, you will be redirected to this section of the form.
 - ii) Once the event is successfully requested you will be redirected to your event page where you will be able to review the requested information and view the event ID.

8) Status

- a) Once submitted the space request will be placed in the system under a 'Tentative' status which will hold your requested space.
- b) At the bottom of the screen a message will appear confirming that your request has been submitted

| 1 Notific | cation | ~ |
|-----------|--|---|
| 5 | Your request has been successfully submitted. A room request does not guarantee your selection. This is not confirmation of a room reservation, but that your request has been entered into the system. New requests, updates, and changes must be made by 5pm three full business days before the booking date. Any requests/edits required after this cutoff must be made in writing to the Scheduling and Event Services office at | × |

- c) SES will receive this request and will process the information. Once complete a member of our staff will contact you regarding confirmation details or questions.
- d) To cancel a request, select 'Cancelled' from the menu.

| 🗹 Edit Event | Cancelled | • | C | 🥐 Help |
|--------------|-----------|---|---|--------|
| | Tentative | | | |
| | Confirmed | | | ^ |
| | Cancelled | | | |
| | | | | |

i) Cancelling will release the space and resources.

25 Live FAQs

HOW DO I SEARCH FOR A SPACE OR EVENT?

You can search locations by building or room name and events by event name or event ID using the "Quick search" section of the 25Live home page. The event ID is provided in a confirmation email consisting of the year the request was submitted followed by a string of six letters. Ex. 20XX-AAAAAA



*If using the 'Capacity' option within the quick search please note that this field is incredibly literal. For example, if searching for a room with a capacity between 15 and 25 it will only show spaces with a maximum seating of 25 and a minimum seating of 15, it will not show you spaces that can seat up to 28.

| Capacity | | |
|----------|-----|--------|
| between | and | d |
| ^ | | ~ |
| ~ | | \sim |

Tip: You can star frequently used locations or save a search to make finding spaces even faster. Your starred locations also have their own widget on the 25Live Dashboard allowing you to quickly check availability!

You can look through any events in which you are the requestor in the "Upcoming Events" section of the 25Live homepage and clicking the "# Events" links



CAN I SCHEDULE AN EVENT IN MULTIPLE LOCATIONS?

Yes! As long as the events are at the same time, they can be booked in multiple spaces - just select each space you need at that section of the event form.

If events are at different times in different spaces, they will need to be scheduled as separate segments.

CAN I EDIT MY OWN EVENT?

Yes, within your reservation you should see a section titles "Edit Event". Once that is selected you will be taken to a page identical to the form that you first used to request the event. Please make any needed changes here at least 3 days in advance of your event. When you are finished be sure to save your changes.

| Details | • | | More Actions |
|-------------------|----------------|--|--------------------|
| ♥ <u>STM 213+</u> | | | ✓ More Actions |
| Confirmed | 2025-AAAATK | Mon Feb 10 2025 1:00 pm - 2:00 Repeats every week on Monday t | pm hrough 12/29 |
| CAMRIS S | TAFF MEETING ☆ | | C |

CAN I CANCEL MY OWN EVENT?

Yes! Open your event in 25Live so you can see the event details then change your event state to cancelled.

| Details | Occurrences | Calendar | Task List | Pricing | Audit Trail | Schedule | More Actions d Emails | |
|----------------------------------|-------------|----------|-----------|---------|--------------|-------------|--------------------------|------|
| | | | | ٢ | 2 Edit Event | Confirmed 🗘 |]G | Help |
| | | | | | | Tentative | | |
| Event Preferences VNS Baseline 2 | | | | | Confirmed | | ^ | |
| | | | | | | Cancelled | | |

Once you select "Cancelled" an alert will pop up to confirm. Click "OK" and the event will be cancelled.

25live.collegenet.com says

Saving an event in the Cancelled state releases any location and resource assignments. Only users with the required security permissions may edit an event that has been cancelled.



Please email <u>somsched@pennmedicine.upenn.edu</u> or call 215-573-5555 if you have any additional questions.