Viewing and Editing Event Occurrences

The Occurrence tab on an Event Details page shows the date, time, associated resources, and associated locations for each occurrence of the event. The Occurrences tab is divided into four sections: Event Preferences, Filter by Resources, Filter by Locations, and Event Occurrences.

Event Preferences

The Event Preferences section displays the feature, partition, location, and resource preferences for this event. It also displays more granular details such as resource quantities and location layouts. These preferences can be edited if you have the appropriate permissions.

To make changes to the preferences, click the **Edit** link that is to the right of the Event Preferences header. This feature does not require that **Edit Mode** be set to **Yes**. Use the **Edit** button under the preference you'd like to update and press **Done** or use the **Remove** button to finish the action.

Event Preferences Edit ⌃

Locations:
  BCC Theater

Resources:
  AV – Extension Cords [Quantity: 1]
  AV – Laptop – Mac [Quantity: 1]
  AV – Microphone – Hand Held with Cord [Quantity: 1]
  AV – Overhead Projector [Quantity: 1]
  AV – Power Strip [Quantity: 1]
  AV – Screen – 10' [Quantity: 1]
  AV – Sound System [Quantity: 1]
  AV – Technician [Quantity: 1]
  FS – Soda [Quantity: 1]

Event Preferences View ⌃

This event has the following preferences
Features:
(none)

Edit

Partitions:
(none)

Edit

Locations:
  BCC Theater

Edit   Remove

Resources:
  AV – Extension Cords [Quantity: 1]
  AV – Laptop – Mac [Quantity: 1]
  AV – Microphone – Hand Held with Cord [Quantity: 1]
  AV – Overhead Projector [Quantity: 1]
  AV – Power Strip [Quantity: 1]
  AV – Screen – 10' [Quantity: 1]
  AV – Sound System [Quantity: 1]
  AV – Technician [Quantity: 1]
  FS – Soda [Quantity: 1]

Edit   Remove

Filter by Resources/Locations

The **Filter by Locations** and **Filter by Resources** sections will only be available if there are two or more locations or resources attached to the event. Check locations and resources in these sections to filter the occurrences displayed in the **Event Occurrences** section.

Event Occurrences

This section shows all of the occurrences on the event, their date, start time, end time, and locations and resources.

Image: View the Date, Start Time, End Time, and Additional Details of each occurrence on the Occurrences tab.

Use the link on the **Date** header to change the sort order of the occurrences on the table. Click or tap on an individual occurrence's date to expand the section and see its details. Once a section is expanded, each occurrence

displays extra details including start and end times, locations and layouts, resources and quantities, and special instructions. Black and white Location and Resource icons represent preferences.

Animation: Click on a date to expand an individual occurrence. Hover over any resource or location to see a summary of its details.

You can also use the **Merged View** and **Segment View** links to switch between the display of occurrences when viewing details for events using multiple segments. In addition, you may inline edit the name of the single or main occurrence at the top of this section.

For information on editing occurrence information, please see the following section "Inline Editing Event Occurrences" or the final section "Editing Occurrences in the Event Form".

Inline Editing Event Occurrences

Several occurrence details can be updated via inline editing. To inline edit occurrences, set **Edit Mode** to **Yes** at the top left of the Occurrences tab.

> 🔒 **Security Note**
>
> Inline editing requires the following permission set to Yes in Group Administration: Basic Options:
>
> - *2.0 Create and Edit Through the Configurable Events Forms*
> - *2.10 Inline Editing on Event Occurrences*
>
> It is also recommended to include 2.2 *Inline Editing on Event Details* as they are related actions.

Image: Use the Edit Mode toggle when available. Note: The Merged View And Segment View buttons will only be visible if the event has multiple segments.

A list of occurrences is shown with an option at the top-right of the list to **Expand All** or **Collapse All**.

Set For All

Check a box in the **Set For All** section to apply changes to multiple occurrences.

Add Locations and Resources

Use the **Add Locations** and **Add Resources** buttons on the occurrence to add locations and resources to your occurrence.

In the **Locations Search** window, select Reserve or Reserve Available on the locations you'd like to add to the selected occurrence. Filter the location results by selecting a search, hiding conflicts, and enforcing headcounts.

Locations Search

☐ Auto-Load Starred   ☑ Hide Conflicts   ☑ Enforce Headcount   ☐ Show Location Satisfactions

[Your Starred Locations ▾]   [Your Starred Locations]   Reset   [Search]

[Add Selected Locations]

	Name —	Title	Default Capacity ∨	Availability —	Conflict Details	Building —
☐ [Reserve]	ARTS 111	Davis Arts Center Classroom	374	1 / 1	None	Davis Arts Center
☑ [Reserve]	BALLROOM I	Hilton Ballroom I	300	1 / 1	None	-
☑ [Reserve]	BCC 203	Baker Classroom Complex - Room 203	36	1 / 1	None	Baker Classroom Complex
☐ [Reserve]	BCC 615	Baker Classroom Complex - Room 615	30	1 / 1	None	Baker Classroom Complex
☐ [Reserve]	HSC 108	Highland Science Center - Room 108	35	1 / 1	None	-

In the **Resources Search** window, select **Reserve** on the resources you'd like to add to the selected occurrence. Filter the results by selecting a search.

Resources Search

☐ Auto-Load Starred

[Your Starred Resources ▾]   [Your Starred Resources]   Reset   [Search]

[Add Selected Resources]

Add		Name —	Quantity Available	Conflict Details
☑ [1 ⬍]	[Reserve]	AV - Blu-ray Player	2 / 2	None
☑ [2 ⬍]	[Reserve]	AV - Laptop - Mac	15 / 15	None
☐ [1 ⬍]	[Reserve]	AV - Laptop - PC	15 / 15	None
☐ [1 ⬍]	[Reserve]	AV - Microphone - Hand Held with Cord	5 / 5	None
☐ [1 ⬍]	[Reserve]	AV - Microphone - Lapel	2 / 2	None

Image Caption

Edit Locations and Resources

On the occurrences table, expand the occurrence data by using the date's link to see the locations and resources reserved.

Date —	Start Time	End Time	Additional Details	Actions
⟩ Fri Feb 07 2025	8:00 pm	9:00 pm	🧊 BCC Theater 🔺 10 resources	[Active ⬍] [Copy] [Delete] [Add Locations] [Add Resources]

From here you can update location layouts, update location instructions, remove locations, update resource quantities, update resource instructions, and remove resources. Please note that if you update the layout on a location assignment, the current instructions will be replaced by the default layout instructions. Additionally, you

have the option to share a location as you can on the event form.

Change Occurrence Date and Time

To update the date and time fields in the occurrence details, click or tap into each field then make a selection. For multi-day occurrences, uncheck the box to allow the occurrence to span midnight. You may not edit an existing occurrence then change its date/time to match an existing occurrence.

Update Additional Time

To update the Additional Time for the event, enter a number into the **Days**, **Hours**, and **Minutes** fields under the **Setup**, **Pre-Event**, **Post-Event**, and **Takedown** time sections.

Edit Comments

You can edit occurrence-level comments using the **Occurrence Comments** field for each occurrence.

If the event uses event segments, you may also edit **Segment Comments** under that heading.

Add a New Occurrence with Copy

Use the **Copy** button on an occurrence to add another occurrence to your event.

Date	— Start Time	End Time	Additional Details	Actions
> Fri Feb 07 2025	8:00 pm	9:00 pm	🔹 BCC Theater 🔺 10 resources	Active ⇕ Copy Delete Add Locations Add Resources

In the **Copy Occurrence** window you can update the occurrence date, time, locations, location layouts, location instructions, resources, resource quantities, and/or resource instructions. You may copy an occurrence and set the copy to the same date/time as the original occurrence, but you may not edit an existing occurrence then change its date/time to match an existing occurrence.

Copy Occurrence ⊗

Fri Feb 07 2025

8:00 pm

To:

9:00 pm

☑ This begins and ends on the same day

Start 8:00 pm   **End** 9:00 pm

Pre-Event 7:30 pm   **Post-Event** 10:00 pm

Warning: You have overlapping occurrences. Consider adjusting occurrence dates or durations.

🔹 **BCC Theater** Shared ☐   Remove   Layout: Theater ⇕

Instructions:
Add instructions ✎

🔺 **AV - Extension Cords**   Remove   Quantity: 1 ✎

Instructions:
Add instructions ✎

🔺 **AV - Laptop - Mac**   Remove   Quantity: 1 ✎

Instructions:
Add instructions ✎

🔺 **AV - Microphone - Hand Held with Cord**   Remove   Quantity: 1 ✎

Instructions:
Add instructions ✎

Update the Occurrence State

Use the dropdown menu under Actions update the occurrence state. Typically, the dropdown will only include the Active and Cancelled states. (Allowing you to cancel your occurrences).

- Cancelled occurrences will have a strike through the occurrence text.

If your occurrence date lines up with a folder constraint or a LYNX date exception, you will also see one or more of the following states:

- **Warning** - This occurrence has encountered a folder warning constraint.
- **Exception** - This occurrence has encountered a folder exclusion constraint or a LYNX date exception.
  - Exception occurrences will have a strike through the occurrence text
- **Override** - This state overrides the Exception state.

Delete an Occurrence

Use the **Delete** button on an occurrence to permanently remove it from your event. Then press **Yes** on the confirmation window to save your change.

Add a New Segment

To add a segment to your event, use the **Segment View** then the **Add a New Segment** button. Then, enter the name, date, and time information for the new segment.
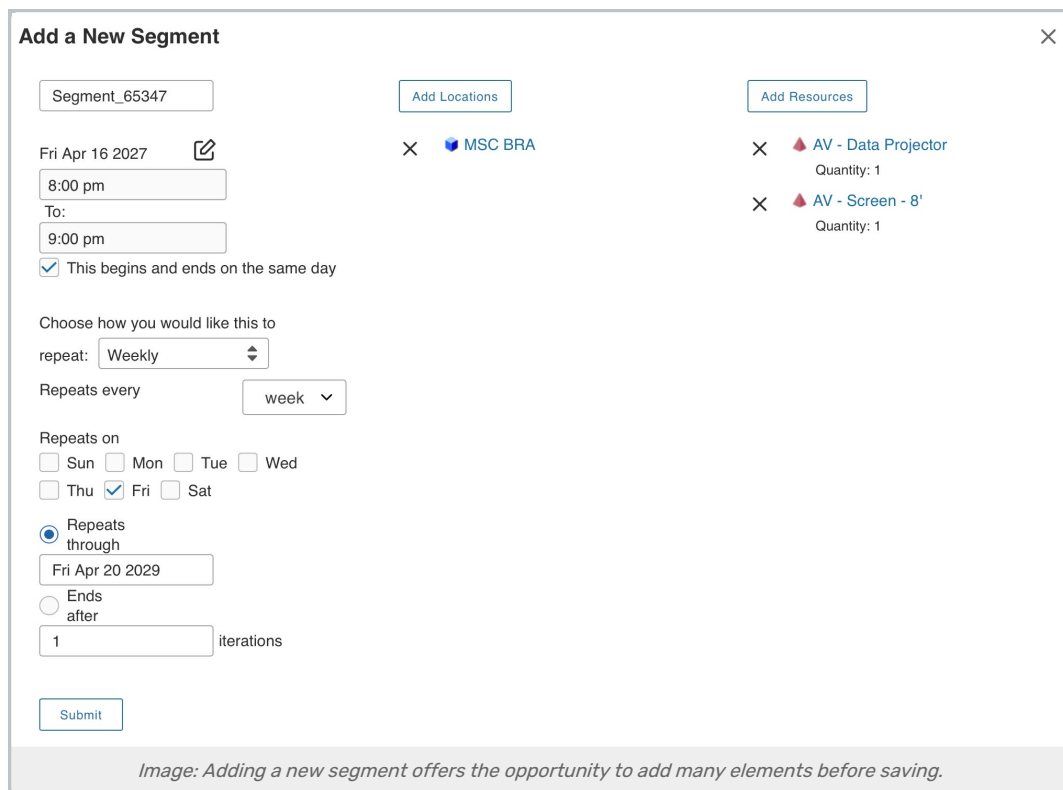
Image: Use the Add a New Segment button to add.

You can also add locations, resources, and repeating patterns to your new segment.

Image: Adding a new segment offers the opportunity to add many elements before saving.

Use the **Submit** button to save.

Copy a Segment to Create a New Segment

You may also use the **Copy This Segment** button to copy a segment. When copying, you may change the name, start date and time, repeating patterns, locations, and resources. You will also be able to choose the **Occurrence Mapping options** for repeating segments.

Editing Occurrences in the Event Form

> ⚠️ **Warning: These Customizations Can Be Lost**
>
> Adjusting an event's initial occurrence date/time may remove the individual occurrence customizations described here as well as existing location and/or resource assignments. Keep this in mind when Editing Events.

Manage All Occurrences

Update individual occurrence information in the event form by opening the **Manage Occurrences** display in the event date and time section of the event form.

In the All Date Occurrences window you can see all of the occurrences on the event. Use the following buttons to filter the occurrence list:

- **Include Only Missing Locations** - Only show occurrences that don't have locations requested or reserved.

- **Include Only Missing Resources** - Only show occurrences that don't have resources requested or reserved.

- **View Included** - Only show occurrences that are marked **Include in Search** in location and resource searches.
  - By unchecking the *Include In Search* checkboxes in the list of occurrences, you can remove an occurrence from your location search to help find locations without conflicts for that date and time.

- **View All** - Return to the default view that shows all event occurrences.

The table shows all of the occurrences attached to the event and has the following columns:

- **Include in Search** - By unchecking the *Include In Search* checkboxes in the list of occurrences, you can remove an occurrence from your location and resources searches to help find locations and resources without conflicts for that date and time.
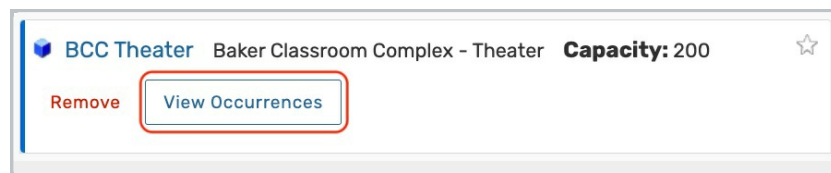
- **Dates** - Displays the date of the occurrence.
- **Times** - Displays the occurrence start and end time—not including any additional time. Click into the text boxes to select new times.
    - If you choose an invalid time (such as an end time that precedes the start time), your change will be reset to the original value.
- **Extra Times** - Displays the Pre-Event, Post-Event, Setup, and Takedown times for the event. To edit these values, you'll need to use the Additional Time section of the event form.
- **Comment** - Displays occurrence comments. Click into the text box to add or update the comment.
- **State** - Shows whether the occurrence is Active or Cancelled. Use the dropdown to change the state.
- **Locations** - Shows the list of locations for the selected occurrence. Use the X button to remove a location from the occurrence. To add additional locations to an occurrence, you'll need to add them in the Locations section of the event form.
- **Resources** - Shows the list of resources for the selected occurrence. Use the X button to remove a resource from the occurrence. To add additional resources to an occurrence, you'll need to add them the Resources section of the event form.
- **Remove** - Tap the Remove button to permanently delete an occurrence.

Use the **Add Occurrence** button beside the filters to add additional occurrences.

If you make any changes, use the **Close** button to save.

Locations and Resource Occurrences

Use the **View Occurrences** button to edit the occurrence details of a location or resource assignment.

The following columns are displayed on the table:

- **Date** - Shows the date of an occurrence. Use the **Set For All** row to make updates for all occurrences.
- **Time** - Displays the occurrence start and end time—not including any additional time.
- **Issues** - Displays conflict data.
- **Included** - When checked, the location or resource that you are viewing will be included on the occurrence. Check or uncheck the box to update this value.

BCC Theater ✕

Date	Time	Issues	Included	Shared	Layout	Instructions	Attendance
Set For All			☐	☐	[▲▼]	[ ]	[ ]
Fri May 09 2025	7:00 pm – 9:00 pm		☑	☐	Theater (200) ▲▼	[ ]	0
Sat May 10 2025	7:00 pm – 9:00 pm		☑	☐	Theater (200) ▲▼	[ ]	0

[Close]

- **Shared** *(Locations only)* – When checked, the location can be shared with any other event during the time of the selected occurrence. Check or uncheck the box to update this value.

- **Layout** *(Locations only)* – Displays the selected layout for the occurrence. Use the dropdown menu to change the layout.

- **Instructions** – Displays the location or resource instructions for the occurrence. Use the text box to update the instructions.

- **Attendance** *(Locations only)* – Shows the attendance number for the occurrence. This value is for tracking only and does not connect to other features in 25Live, such as Registration. Use the text box to update this value.

AV - Extension Cords ✕

Date	Time	Issues	Included	Instructions	Quantity	Available
Set For All			☐	[ ]	[ ]	
Fri May 09 2025	7:00 pm – 9:00 pm		☑	[ ]	1	15/15
Sat May 10 2025	7:00 pm – 9:00 pm		☑	[ ]	1	15/15

[Close]

- **Quantity** *(Resources only)* – Displays the selected resource's quantity for the occurrence. Use the text box to update the resource quantity.

- **Available** *(Resources only)* – Shows how many of the selected resource are not reserved out of the stock total.

If you make any changes, use the **Close** button to save.