Viewing Event Details

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Security Note

There are several permissions required in <u>Group Administration</u> to see each piece of data on an event Details page. These are inclusive of, but not limited to:

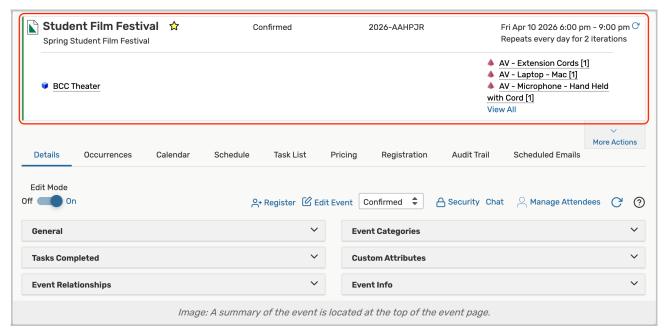
- Object security permissions to view the event, associated locations, and associated resources
- Basic Options: 3.0 Register for an Event
- Basic Options: 4.0 View Pricing on Events

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- Basic Options: 8.0 View Audit Trail on Events
- Basic Options: 8.0 View Contacts
- Basic Options: 10.0 View Tasks List
- Basic Options: 14.0 Send Emails
- Administrative Options: 3.0 View and Edit Event Registration
- Tools Access: 4.0 Access to LYNX Tool
- Tools Access: 7.0 Access to CRM Tool
- Tools Access: 8.1 Access to Event Chat

If you are are missing a feature that you believe you should have access to, please contact your 25Live administrator.

Each event in 25Live has its own Details page where you can find all of its data including the event state, occurrence date(s), scheduling contacts, tasks, relationships with other events, assigned location(s), and more.



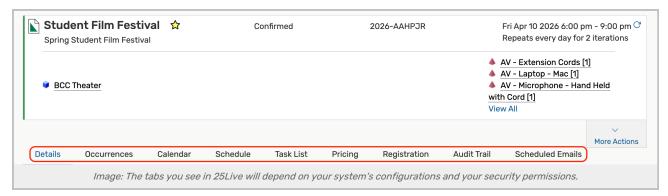


Tip

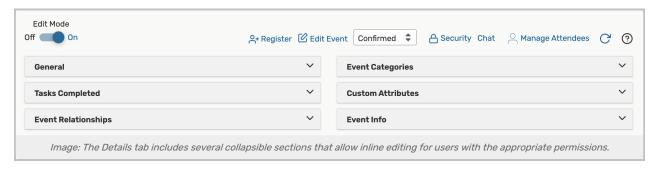
Location, resource, organization, contact and event names are clickable in 25Live. These links will take you to the Details page for each of these objects.

Event Tabs

Below are descriptions of each of the event details tabs and their uses. Please note that what you are able to view on this page will depend on your security settings and configurations. If there are settings you think you should be able to see or edit, please contact your 25Live Administrator.

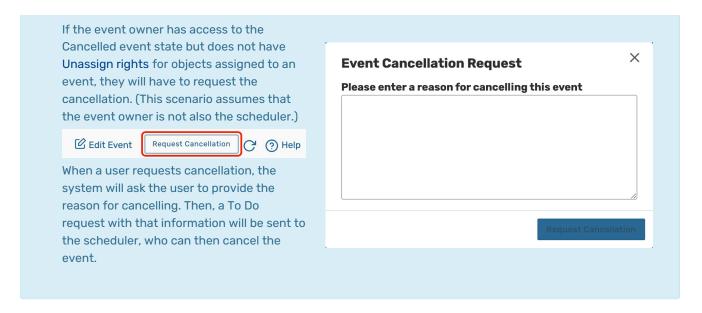


Details



- Edit Mode Set the toggle to On to enable inline editing.
- Register Click to register for this event. If you are already registered, this link will be updated to View Registration.
- Edit Event Open this event in the event form.
 - o For more about Event States, see Choosing an Event State.
- Event State Update the event state.
 - Please note that updating the Event State from the Event Details can trigger Event Save Email scenarios to send.





- Security This link sends you to the Object Security configuration page for this event in Group Administration.
- Chat Opens an event chat in StandOut Classroom.
- Manage Attendees Allows you to create a new CRM pool in the Customer Relationship Management (CRM) tool.
- Refresh You can refresh the summary using the refresh icon 🖰 in the upper-right of the summary area.
- Help Press to be moved to the KnowledgeBase.

Additional event information is available in collapsible sections:

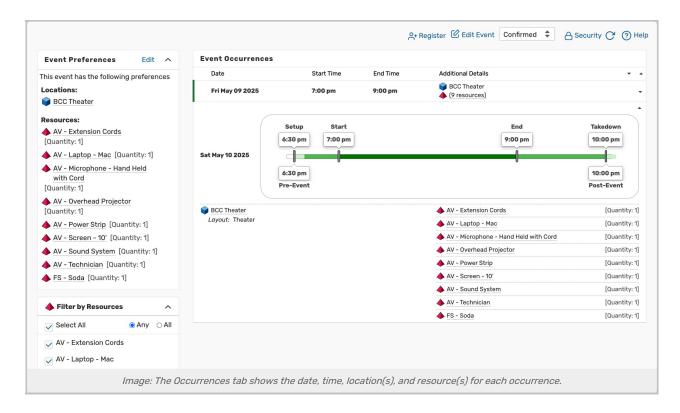
- General This section has all of the basic event information, most of it can be inline edited.
 - o For more information on inline editing, see Inline Editing Event Details.
- Tasks Completed Lists task statistics with a link to "View this event's Task List".
- Event Relationships Lists the related events (if there are any) with links to view those events' details.
- Event Categories Shows the categories associated with the event and an "Add" link for adding more categories.
- Custom Attributes Shows the custom attributes for this event with an "Add a Custom Attribute" option button.
- Event Info Outline of additional event information including the requirements, owner, creation date, reference, cabinet, and folder.

For more information, please see Event Data Overview.

Occurrences

The Occurrences tab lists the Date, Start Time, End Time, and Additional Details of each event occurrence. On the left, there are panels for the Event Preferences. If the event has multiple locations/resource, there will also be a Filter by Locations/Resources panel.

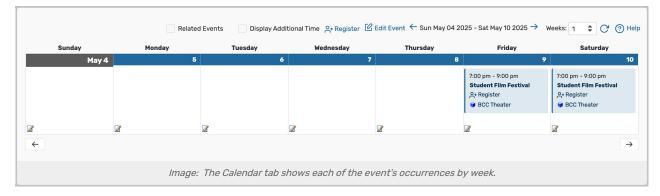
For more information, please see Viewing and Editing Event Occurrences.



Calendar

The Calendar tab displays a calendar of occurrences for the event you are viewing.

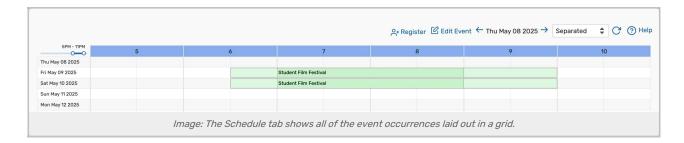
For more information, please see Working With Calendar Views in 25Live.



Schedule

The Schedule tab shows a color-coded block for each event occurrence in the event you are viewing. The blocks are laid out on a grid to highlight the dates and hours that each occurrence takes place. This view is interactive, allowing you to reschedule occurrences right from the grid.

For more information, please see Working With Availability Views in 25Live.



Task List

In the Task List tab, the details of tasks associated with this event (or related events) are displayed. This view will look different depending on whether your 25Live instance has Tiered Workflow enabled.

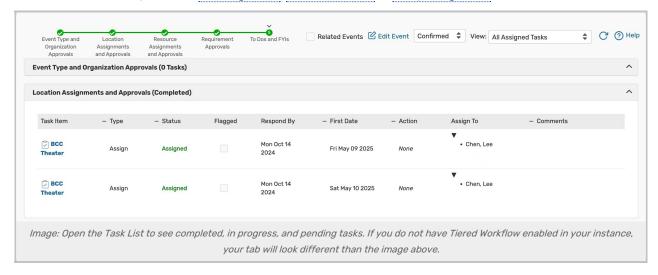
Tiered <u>Workflow</u> is an automated process that links an event's <u>tasks</u> together so that they are completed in a predetermined order. This means that some tasks cannot be completed until others have been. Each section of tasks can be expanded and collapsed and will indicate whether the task are completed or pending.

If Tiered Workflow is not enabled in your instance, a table will display each of the event's tasks, which do not need to be competed in a specific order.

You can use the appropriate action buttons to complete a task:

- Approve or Deny to complete an approval notification
- Assign or Deny to complete a location or resource assignment request
- Complete or Ignore to complete a To Do task

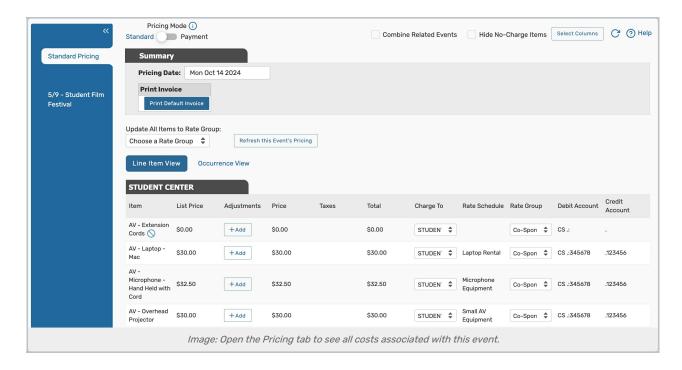
For more information, please see Viewing Tasks, Tiered Workflow, & Completing Tasks.



Pricing

For events that have associated costs, you can use the Pricing tab to make pricing adjustments, export invoices, manage payments, and more.

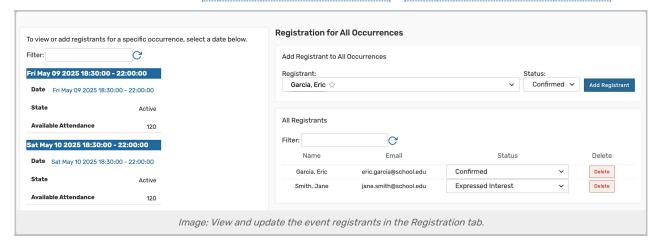
For more information, please see Viewing and Modifying Event Pricing, Generating an Invoice, & Managing Payments in 25Live.



Registration

For events that allow registration, you can manage attendance information from the Registration tab.

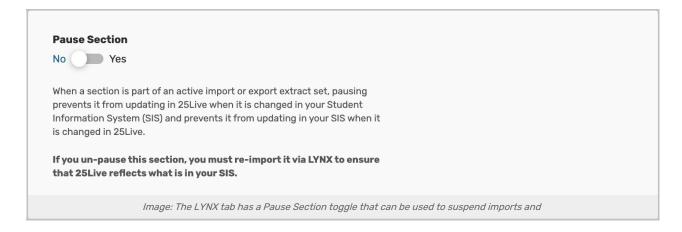
For more information, please see Registering for an Event in 25Live & Managing 25Live Event Registrations.



LYNX

If a 25Live event has been imported via the <u>Series25 LYNX Interface</u>, you can use the LYNX tab to suspend SIS imports and exports for the section you are viewing.

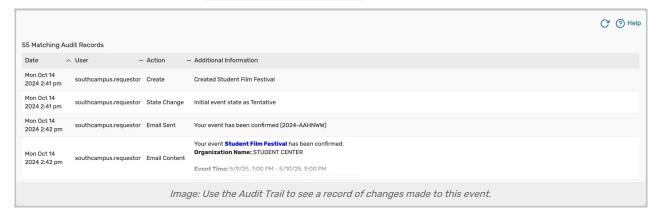
For more information, please see Pausing a Section from the LYNX Tab in 25Live.



Audit Trail

The Audit Trail tab displays a sortable table of changes to this event. Tap or click the **Date**, **User**, or **Action** column headings to sort by those columns.

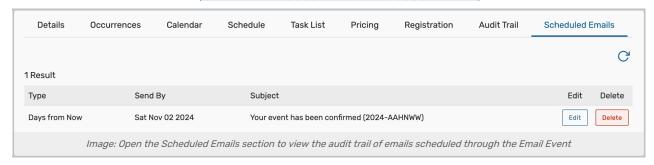
For more information, please see Viewing an Event's Audit Trail.



Scheduled Emails

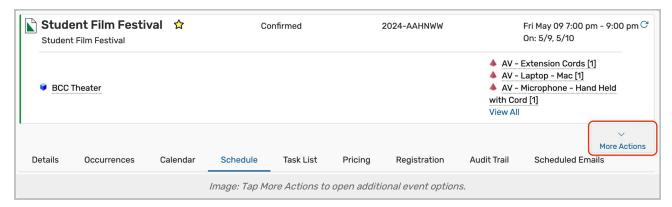
The Schedule Emails tab shows a record of scheduled emails including those created from the Email Event section of the More Actions menu or from Event Save Emails.

For more information, please see Saving, Printing, Emailing, and Scheduling Reports.

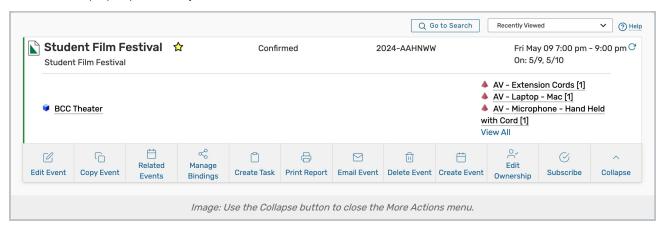


More Actions Menu Options

Expand the More Actions menu to see additional actions available for events.



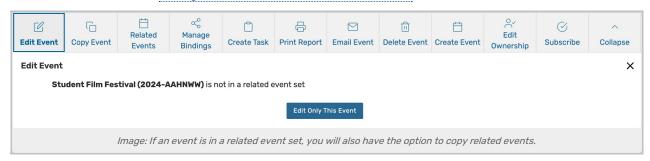
To close the display, tap the Collapse button.



Edit Event

Edit this event or related events.

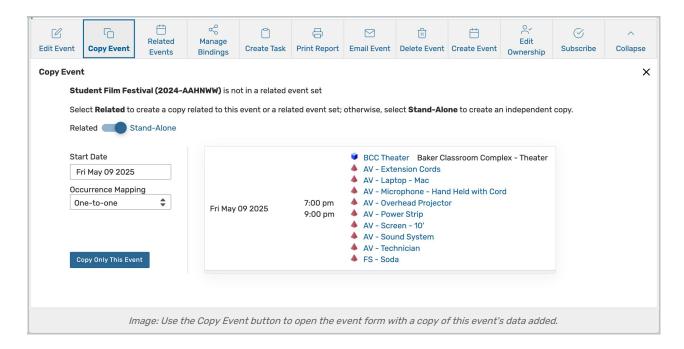
For more information, see Editing Individual Events With the Event Form.



Copy Event

Duplicate this event.

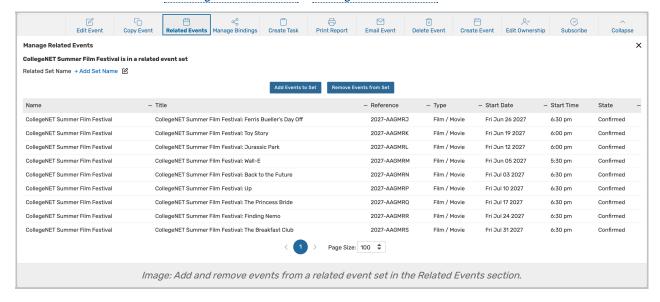
For more information, see Copying Events & Copying Related Events.



Related Events

Update this related event set.

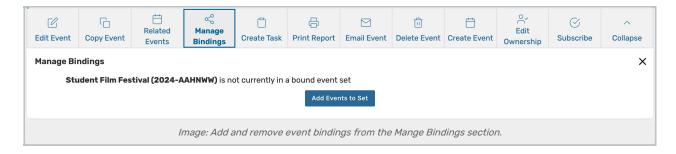
For more information, see Creating Related Events & Editing Related Events.



Manage Bindings

Create or edit events that are bound to this one.

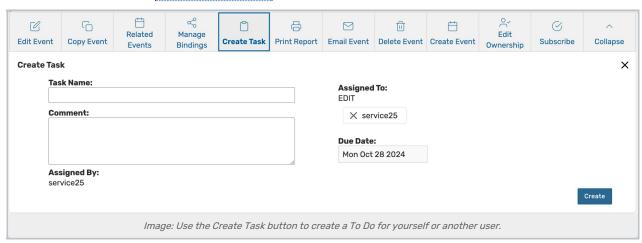
For more information, see Creating Event Bindings & Removing Event Bindings.



Create Task

Create and assign a To Do task.

For more information, see Creating To Do Tasks.



Print Report

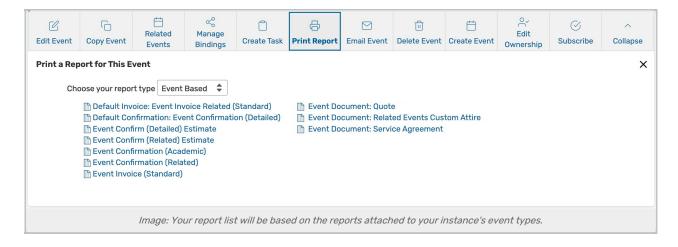
Print a report (including invoices, if one has been defined for the current event type), or custom document using information from this event.



Note: Setting Default Reports

Administrators can set the default confirmation and invoices reports in System Settings > Master Definitions > Event Types.

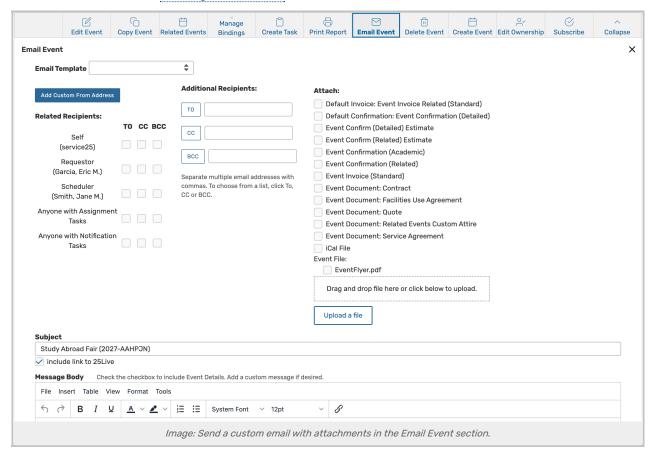
For more information, see <u>Utilizing Custom Documents</u>, <u>Defining a Custom Report</u>, <u>& Adding and Editing Event Types</u>.



Email Event

Send event details and attachments via email.

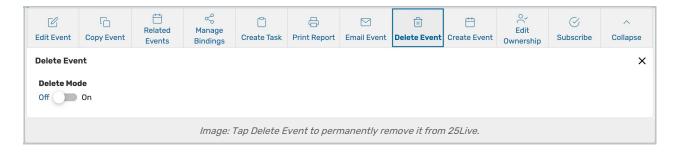
For more information, see Emailing Event Details.



Delete Event

Permanently delete an event.

For more information, see Deleting Events.



Create Event

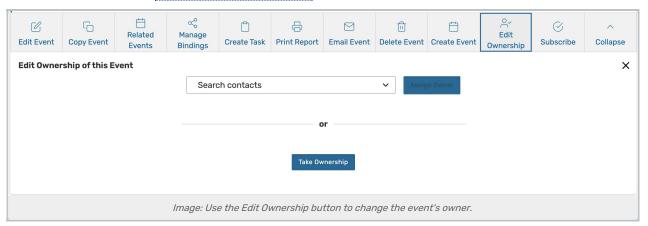
Open a blank event form.

For more information, see, Creating Events With the Event Form.

Edit Ownership

Change the event owner to your contact with editing rights.

For more information, see Editing Ownership of Events.



Subscribe

Subscribe to an event calendar feed.

For more information, see Subscribing to an Event Feed.

