

Setting up Event Quotas

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Security Note

This functionality requires the following permissions set in [Series25 Group Administration](#):

- To setup Event Quotas in the Event Form Settings, you will need: Administrative: 20.0 *Update Event Creation and Editing Configurations* = Yes
- To set an Event Quota for a security group, use the **Select Security Groups** button to select which security groups (that have Administrative: 33.0 *Override Event Quotas* = No) this quota should be applied. If no security groups are selected, then the quota will apply to **all** groups that have Admin Override Event Quotas = No.

What Are Event Quotas?

Event quotas are limits on the number of occurrences (or "reservations") a user or organization can request per a given time period. (Note that the number of occurrences may not match the number of events.) For example, if a user has a two-occurrence quota per day, this limit would be met once the user creates...

- Two events that each have only one occurrence on a single day
OR
- One event that has two occurrences on a single day

Event Quotas allow you to limit the number of occurrences that can be created...

- By any/all security groups
OR
- By one or multiple organizations



Note: Caveats and Other Things to Keep in Mind

- Quotas aren't calculated until the event is submitted.
- Quotas do not apply to events that are in Cancelled or Draft event states.
- Quotas apply "retroactively". So if a user created occurrences before a quota is in place, those occurrences will count towards the quota limit once the quota has been created.
- When two or more quotas overlap, the more restrictive quota will be applied.
- Only completed location workflow is counted against users with request rights to a location. So, if there is still a pending workflow task, and the space hasn't been assigned, it will not count against that user's quota. If the request would be guaranteed to exceed their allotted quota *time*, regardless of the location request, they will still be denied based on the time restriction.
- A user's timezone might be different than the system timezone. An occurrence will be considered in the user's timezone when it comes to system and location quotas and in the system's timezone when it comes to organization quotas. This is mostly relevant for occurrences spanning midnight.

Creating a New Event Quota

A new event quota can be created in the 25Live [System Settings](#) > Event Form Settings > Event Quotas.

Event Quotas

[Add Quota](#)

Filter:

[Select Columns](#)

Name	Type	State	Occs	Time	Duration	Organizations	Locations	Copy	Edit	Delete
System	User	Active	300		1 Year			Copy	Edit	Delete
Student	User	Active	2		2 Days			Copy	Edit	Delete
User Limit 5 Rsrv / Week	User	Active	5	7 Days	1 Year		• ARTS 301	Copy	Edit	Delete

Image: Create a new Event Quota under System Settings > Event Form Settings.

Create a new event quota by using the **Add Quota** button and then filling out the form.

×

Create New Quota

Name

Type

Choose whether reservation totals should be counted by user or by primary organization

☒ User ☐ Organization

State

Inactive ☐ Active ☒

Included Events

Should this quota consider existing occurrences by the user or organization. Select "Single Event Only" for use with an embedded form to be used with guest users.

All Events ☒ Single Event Only ☐

Occurrence Count

Total Time

Days

Hours

Minutes

Duration

☒ Days ☐ Months ☐ Years

Application

Should quotas be applied to locations individually or the entire group?

☒ Individually ☐ Group

Locations

Security Groups

Quotas will only apply to users without override FLS for event quotas. Choose no security groups to apply to all users without quota override.

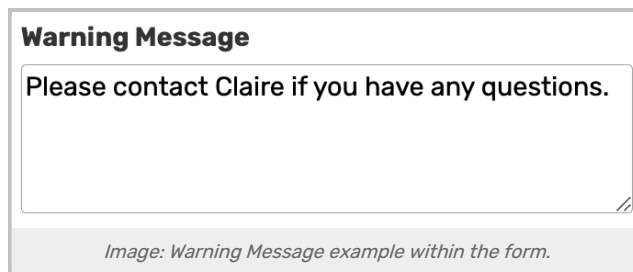
Warning Message

Save Cancel

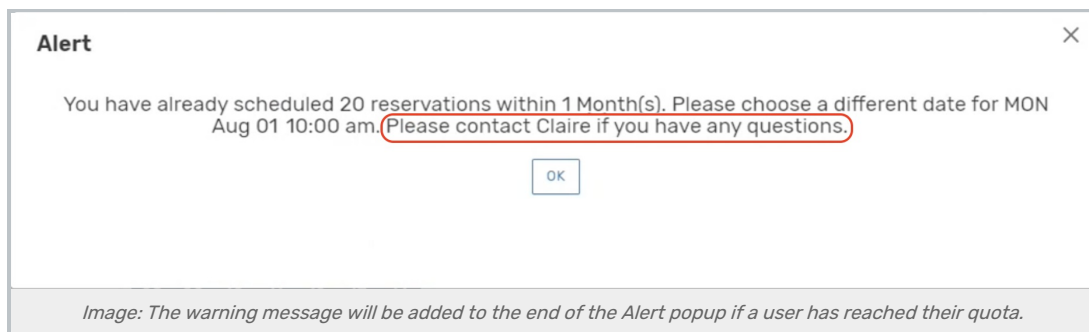
Image: Set up an Event Quota for users or organizations by completing the configuration form.

- **Name:** Enter a name for your Event Quota configuration. This field is required.
- **Type:** Choose from [User](#) or [Organization](#).
- **Organizations:** (Organization event quotas only) Select which organization(s) the quota configuration should be applied to

- **State:** Use the toggle to set the configuration to Inactive or Active.
- **Included Events:**
 - Choose the **All Events** option to apply this quota to all occurrences/events
 - The **Single Event** option is ideal for limiting the number of reservations that are added to events from embedded forms using guest users
 - *Note: Quotas created before this option was available will display "All Occurrences" in the tabled list of quotas.*
- **Occurrence Count:** Enter a number or use the arrow buttons to set the limit of occurrences/reservations
- **Total Time:** Enter Days, Hours, and/or Minutes values to set a limit on the duration of occurrence time allotted
- **Duration:** Enter a number or use the arrow buttons, and choose from Days, Months, or Years, to set the time constraints of the entire configuration
- **Application:** Select if the quota should be applied to locations individually or to the entire group
 - **Individual:** applies the quota configurations to the individual
 - *Example:* A user is only able to reserve **each of** the three ARTS rooms twice per day. They create two ARTS-1 occurrences and two ARTS-2 occurrences, for a total of four occurrences. They have met the quota for both ARTS-1 and ARTS-2, but are free to make two more occurrences in ARTS-3.
 - **Group:** applies the quota configurations to the entire group
 - *Example:* A user is able to reserve **any of** the three ARTS rooms twice in one day. They reserve ARTS-1 once and ARTS-2 once, meeting their event quota at a total of two occurrences. They are unable to reserve any more time in ARTS-1, ARTS-2, or ARTS-3 for the remaining quota duration.
- **Locations:** Use the **Select Locations** button.
- **Security Groups:** Use the **Select Security Groups** button to select which security groups (that have [Groups permission](#) **Administrative: 33.0 Override Event Quotas = No.**) this quota should be applied to. If no security groups are selected, then the quota will apply to **all** groups that have **Administrative: 33.0 Override Event Quotas** set to **No**.
- **Warning Message:** Add a custom message that will be added to the end of the default quota warning. This field is optional.

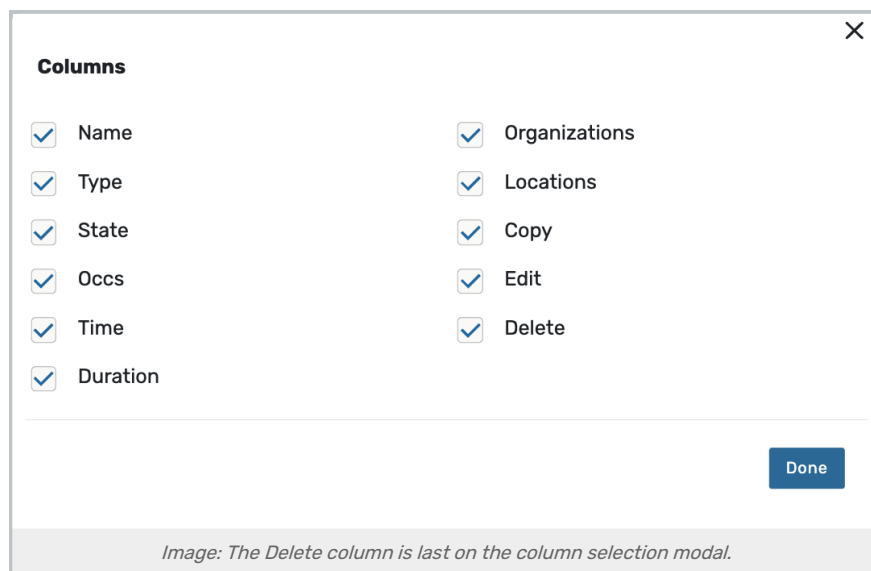
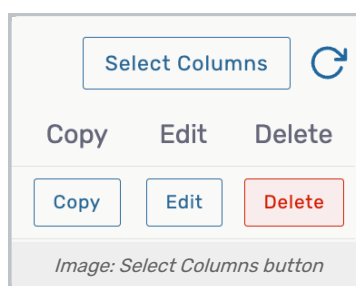


The image shows a screenshot of a form field labeled "Warning Message". The field contains the text "Please contact Claire if you have any questions." and has a small icon in the bottom right corner. Below the field, there is a caption: "Image: Warning Message example within the form."



Deleting Event Quotas

The **Delete** column is out of view by default. To delete an existing quota, you will need to add the Delete column to your quota table by selecting **Select Columns** and ticking the **Delete** checkbox.

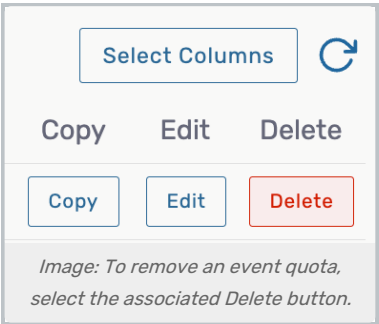


Then select **Done** to populate the **Delete** buttons.



Note:

There is no warning popup when deleting event quotas, so be sure that you are ready to delete the quota before clicking the **Delete** button.



Types of Quotas

User

Determines how many occurrences a user can create during a given time period.

×

Create New Quota

Name

Users - 300

Type

Choose whether reservation totals should be counted by user or by primary organization

☒ User
 ☐ Organization

State

Inactive ☐ Active ☒

Included Events

Should this quota consider existing occurrences by the user or organization. Select "Single Event Only" for use with an embedded form to be used with guest users.

☒ All Events
 ☐ Single Event Only

Occurrence Count

300

Total Time

Days

0

Hours

0

Minutes

0

Duration

1

☐ Days
 ☐ Months
 ☒ Years

Application

Should quotas be applied to locations individually or the entire group?

☒ Individually
 ☐ Group

Locations

Select Locations

Security Groups

Quotas will only apply to users without override FLS for event quotas.

Select Security Groups

×

Requestor - Faculty and Staff

Save

Cancel

Image: User Type Event Quotas form.

For the example above, a user could only create 300 occurrences within a given calendar year. If they meet the 300 mark for this year, they will have to schedule any additional occurrences for next year.

Optional: Adding locations will add an additional layer to the quota, determining how many occurrences within a given location (or group of locations) a user can create during a given time period.

Organization

Determines how many occurrences can be created under a given organization and within a given time period. This quota can be applied to individual organizations or a group of organizations.

×

Create New Quota

Name

Student Rec

Type

Choose whether reservation totals should be counted by user or by primary organization

☐ User
 ☒ Organization

Organizations

This quota will be applied when the primary organization of the event is in the list below

Select Organizations

×

STUDENT RECREATION CENTER

State

Inactive

Active

Included Events

Should this quota consider existing occurrences by the user or organization. Select "Single Event Only" for use with an embedded form to be used with guest users.

All Events

Single Event Only

Occurrence Count

20

Total Time

Days

0

Hours

0

Minutes

0

Duration

1

☐ Days
 ☒ Months
 ☐ Years

Application

Should quotas be applied to locations individually or the entire group?

☒ Individually
 ☐ Group

Locations

Select Locations

Save

Cancel

Image: Organization Type Event Quota form.

For the example above, the organization selected can create 20 occurrences within the month.

Optional: Adding locations will add an additional layer to the quota, determining how many occurrences within a given location (or group of locations) an organization can create during a given time period.



Note: Additional Organizations

Only organizations marked as the Primary Organization on an event will count against the limit for an Organization Type quota. Organizations set as an Additional Organization on an event will not.

What Happens When a User Meets a Quota?



Warning:

Because Quotas are applied retroactively, users may receive quota warnings when editing events that were created before that quota was in place.

Express Scheduling

If a user selects a location in [Express Scheduling](#) when they've already met their quota, they will receive a warning:

Date / Time

SAT Apr 30

11:00 am

To:

12:00 pm

Duration:

1 Hour

**You have already
scheduled 2 reservations
in this space within 2
Days. Please choose a
different date or location.**

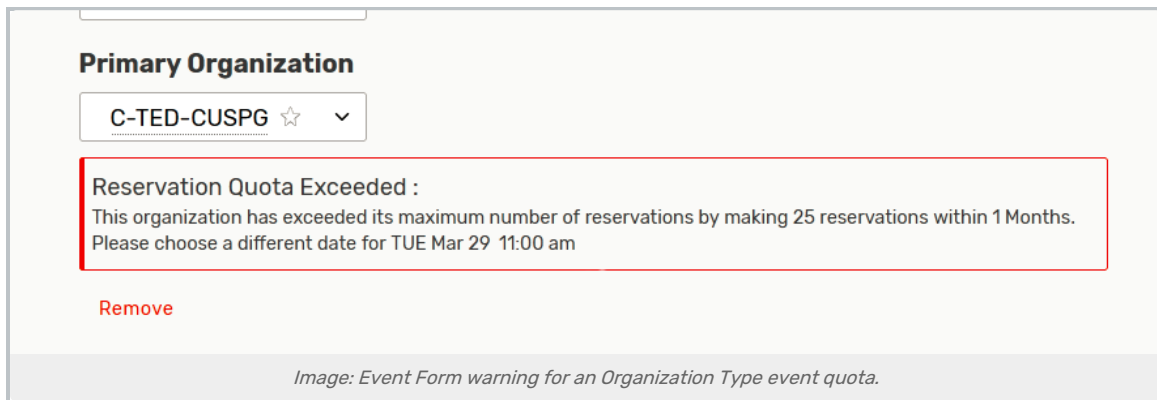
Express Locations

Image: Express Scheduling will display a warning if a user has met their event quota.

If the user tries to save anyway, they receive an alert with the same message:

Event Form (including embedded forms)

If a user adds an organization and hits that organization's quota, they'll receive the warning, "Reservation Quota Exceeded: This organization has exceeded its maximum number of occurrences by making X occurrences within Y Months. Please choose a different date for <DATE/TIME>"



Primary Organization

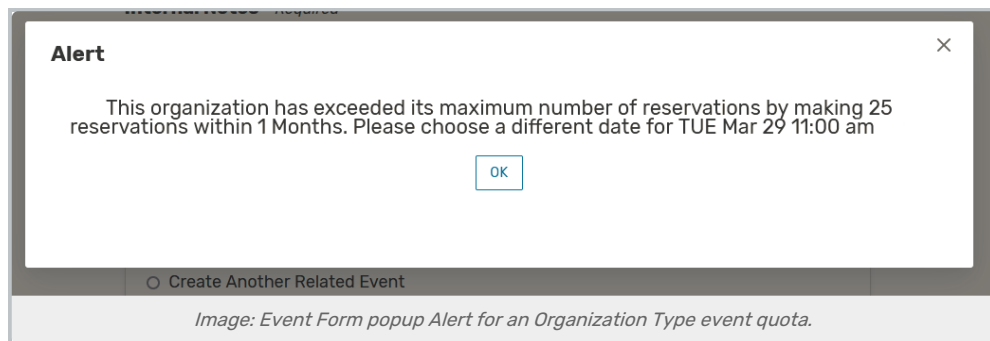
C-TED-CUSPG ☆ ▼

Reservation Quota Exceeded :
This organization has exceeded its maximum number of reservations by making 25 reservations within 1 Months.
Please choose a different date for TUE Mar 29 11:00 am

[Remove](#)

Image: Event Form warning for an Organization Type event quota.

If the user tries to save with this organization anyway, without changing the date:



Alert ×

This organization has exceeded its maximum number of reservations by making 25 reservations within 1 Months. Please choose a different date for TUE Mar 29 11:00 am

[OK](#)

☐ Create Another Related Event

Image: Event Form popup Alert for an Organization Type event quota.