Creating and Editing Custom Event Form Configurations in 25Live

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🔒 **Security Note**

To access the custom Event Form configurations and settings, you must have appropriate permissions. If you cannot access these views and wish to, please contact your 25Live Administrator and request permission Administrative: 20.0 *Update event Creation and Editing Configurations* in Permissions in Series25 Group Administration.

The Event Form is where 25Live users create and edit events. Users with appropriate permissions can create custom configurations to control various aspects of the Event Form for different security groups, including many settings for the whole form, hiding fields, customizing field names, adding or customizing help text for fields, requiring fields, and more.

The settings for custom Event Form configurations allow you to craft the experience for each security group. You can even create different configurations for the same security group based on whether they're creating or editing an event. Use the setting in the Series25 Group Administration tool to set which configuration is the default for each security group when creating and editing.

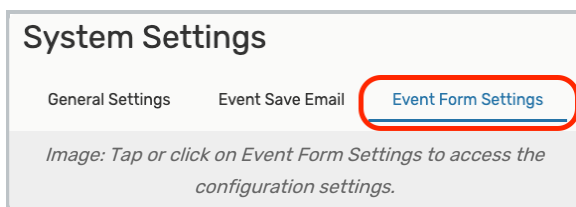# How to Create or Edit a Custom Event Form Configuration

1. Open Event Form Config Settings in System Settings

Image: The More menu in the top navigation bar has a link to the System Settings view.
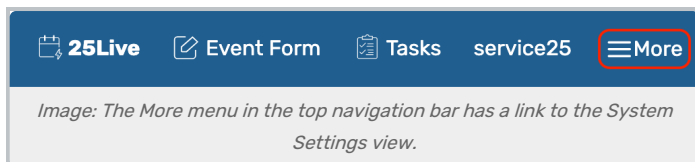
After logging into 25Live as an administrator or user with permissions to access this feature, open the **More** menu in the top navigation bar.


Image: The System Settings link in the More menu.
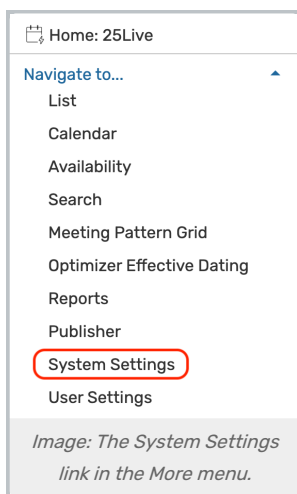
Use the menu link to go to the **System Settings** view.

Image: Tap or click on Event Form Settings to access the configuration settings.

Go to the the **Event Form Settings** section, then select **Config Settings**.

2. Select Whether to Edit or Create a New Config

Image: Select an existing configuration or use the Add Config button to create a new one.
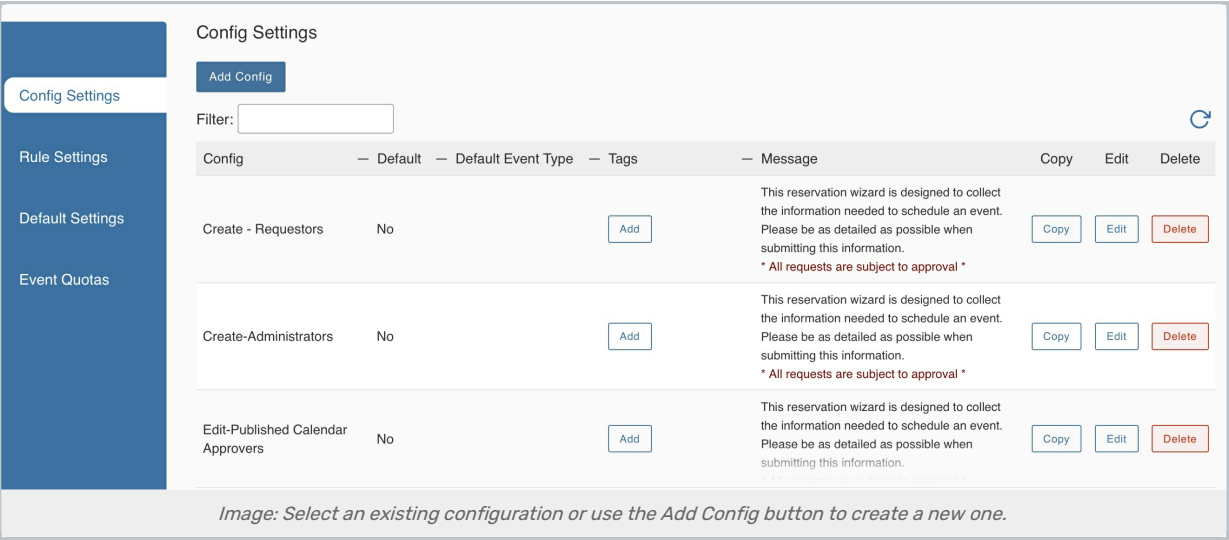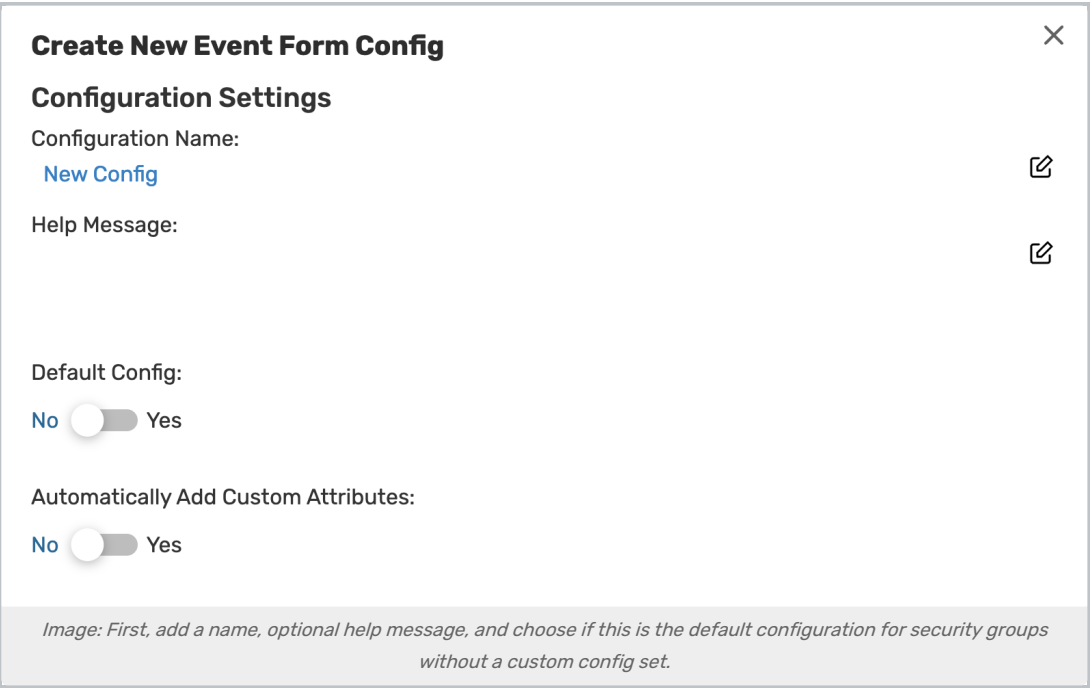
If you've already created one or more configurations, locate it on the configurations table and select **Edit**. The table can be sorted by columns.

The **Add** button in the **Tags** column is used to add System Tags to limit who can access each event form configuration.

Create a new config using the **Add Config** button.

3. Complete Initial General Configuration Settings

Image: First, add a name, optional help message, and choose if this is the default configuration for security groups without a custom config set.

The first few settings are the most basic overall settings for this configuration:

- *Configuration Name* – Use the edit icon ( ) to add a descriptive name that will help you identify the config when choosing it for security groups. Is this config for approvers? For students? For staff requestors?

- *Help Message* – Optionally, you can add a help message and/or instructions for the overall form that will appear above the fields.

- *Default Config* – Toggle to **Yes** to make this the default config for security groups that don't have a custom configuration explicitly set for them in the Group Administration tool.

4. Set the Remaining General Config Options

Automatically Add Custom Attributes:

No ⬤▭ Yes

All Custom Attributes Are Optional:

No ⬤▭ Yes

Allow Spans Midnight Events:

No ⬤▭ Yes

Show All Day Toggle:

No ⬤▭ Yes

Allow Add/Remove Segments:

No ⬤▭ Yes

Use Recommended Resources (instead of resource search):

No ⬤▭ Yes

Use Recommended Locations (instead of location search):

No ⬤▭ Yes

Allow Silent Save (don't trigger Event Save scenarios):

No ⬤▭ Yes

Disable Rules:

No ⬤▭ Yes

Default Event Type:

| Select from Types   ⌄ | Remove |

Allow Repeating Pattern:

No ⬤▭ Yes

Repeating Pattern Help Message:

Image: Complete the remaining configuration settings.

The remaining general settings that apply to the whole configuration cover how the whole Event Form will behave in this config, and include:

- ***Automatically Add Custom Attributes*** - If you have custom attributes set up without related rules, toggle this

setting to have all of those automatically appear on the form

- *All Custom Attribute Are Optional* - Overrides event form rules and restrictions, allowing custom attributes that would otherwise be required to be optional

- *Allow Spans Midnight Events* - Toggle to allow an event to begin on one day and end the next day or after

- *Show All Day Toggle* - Set to **Yes** to display an **All Day** checkbox on the event form in the event's time section. Once selected users can check the box to automatically set the event time to 12:00AM-11:59PM

- *Allow Add/Remove Segments* - If your institution uses event segments, toggle this setting to allow them

- *Use Recommended Resources* *(instead of resource search)* - You can show a list of recommended resources based on rule settings

- *Use Recommended Locations* *(instead of location search)* - You can show a list of recommended locations based on rule settings

- *Allow Silent Save* *(don't trigger Event Save scenarios)* - Set to **Yes** to allow users to save an event without triggering any automated Event Save actions, including sending emails and creating To Do tasks

- *Disable Rules* - Setting this to **Yes** allows administrators to override rules if necessary *(an alternative to using inline edit)*

- *Default Event Type* - Use this to set a default event type for the form *(Recommended best practice)*

- *Allow Repeating Pattern* - Set to **No** if you don't want to allow users to create repeating events with this configuration

- *Repeating Pattern Help Message* - If you are allowing repeating events, you can add help and instructions for users

5. Complete Item Settings for Each Event Form Field

✓ **Tip: You Can Re-order Event Form Fields In Item Settings**

Item Settings

Config Settings			
Rule Settings			
Default Settings			
Event Quotas			

Event Name
Display Name: Event Name
Visibility Level: Required
☐ Auto Open Help Message
Help Message:
Please enter a name that clearly describes the event.

Event Title
Display Name: Event Title
Visibility Level: Editable
☐ Auto Open Help Message
Help Message:
The **Event Title** will replace the **Event name** (above) on all published calendars on the **Andrea University** website.
Grammar, punctuation, and clarity matter!

Event Type
Display Name: Event Type
Visibility Level: Required
☐ Auto Open Help Message
Help Message:
Select the **Event Type** that best describes the event.

Primary Organization
Display Name: Primary Organization
Visibility Level: Required
☐ Auto Open Help Message
Help Message:
Select the **Organization** responsible for the event from the list of favorite organizations, or search by organization name.

Note: If the search does not return the expected result, try limiting the search term to a key word in the organization name (ex admissions, club, team).

Additional Organizations
Display Name: Additional Organizations
Visibility Level: Editable
☐ Auto Open Help Message
Help Message:

Expected Head Count
Display Name: Expected Head Count
Visibility Level: Required
☐ Auto Open Help Message
Help Message:
Please enter the expected attendance for the event.

Animation: Demonstration of reordering items.

The Event Form Configuration settings include the ability to re-order the form fields within the **Item Settings** section. Use the drag-and-drop handle (⠿) to the left of each item title to drag and re-order items.

Warnings and Best Practices:

- *Please be aware that some fields will not display or be editable until an Event Type is chosen by the user. We recommend keeping the Event Type field above all items that depend on its value or setting a default Event Type for configurations.*

- *Be careful when moving some fields, such as Locations or Resources, above the Event Date field to not confuse users or cause them to find new selections.*

Image: Item Settings allow you to set many options for each field on the Event Form for this config.

Using the **Item Settings**, you can choose which fields to include, the field name, whether or not each is required, add help text, and set whether help text is automatically displayed. You can change the order of fields in the Event Form using the drag-and-drop handles.

Image: Visibility choices are available for each field.

Each Event Form field has the following options available to set:

- *Display Name* - Edit the default field label

- *Visibility Level* - Choices for whether fields display and if they are required

    - *Not Visible* - Does not display on the form

    - *View Only* - Displays but is read-only

    - *Editable* - Visible and editable

    - *Required* - Visible, editable, and required for submission

> ℹ️ **Note: If Locations or Resources Are Required**
>
> If locations and/or resources are set to Required, users will need to set one for each event occurrence.

> **Note: If Custom Attributes are Required**
>
> If custom attributes are set to Required, users will only need to complete **one** of the custom attributes on the form. If one or more specific custom attributes should be required, you will need to configure that by security group in the Group Administration [Event Form Presentation](#).

- *Auto Open Help Message* - Check this option to have the help text automatically displayed. If not checked, the user must toggle the help open to read

- *Help Message* - Add help and/or instructions for this field using an HTML editor that allows font styles and colors

Help Message:

File   Insert   Table   View   Format   Tools

B   I   U   A ∨   ✎ ∨   ☰   ☰   System Font ∨   small   ∨   🔗

This reservation wizard is designed to collect the information needed to schedule an event.
Please be as detailed as possible when submitting this information.
* All requests are subject to approval *

Image: The Help Message field features a text editor that allows text styles and colors.

> **Note: Defaults for Hidden Fields**
>
> Hidden fields that are essential to the system will be given a default value. For example:
>
> - A not visible Event Date/Time will default to the current date and time with a single, one-hour occurrence
>
> - The [Event State](#) will default to the user's chosen default or the system's (or the first allowed state, which are set up in Group Administration). When editing an event, the event type saved on the event overrides the default
>
> - Event Name will default to "event_[event ID]"

6. Save the Custom Configuration

The **Save** and **Cancel** buttons move with your view as you scroll and are always available at the bottom-left of the editing window.

Selecting Configurations for Security Groups

🔒 **Security Note: Event Form Configurations are Only Visible if the Security Groups Has Permission**

System Tags can be used to limit availability of configurations to certain groups. If you cannot view or use a configuration you think you should have access to, contact your 25Live Administrator. If you are an admin with appropriate permissions, you may set tags for each configuration in the listing of all configurations in *System Settings > Event Form Settings > Config Settings* .

Configure Event Form For... ⓘ

Name:

Requestor – Students – Tentative

Description:

FLS – Create tentative events, see abridged lists, run searches, run reports, view tasks

| Event Restrictions | Event Configuration |

1. What **Event States** do you want Security Group to have access to when **Creating and Editing Events**?

○ Users can access all Event States when Creating Events
◉ Restrict Creation to these Event States:

States
Tentative, Confirmed ▾

2. What **Event Types** do you want Security Group to have access to when **Creating and Editing Events**?

○ Users can access all Event Types when Creating Events
◉ Restrict Creating to these Event Types:

Types
Athletic Practice, Break... ▾

3. What **Event Custom Attributes** are required when **Creating and Editing Events**?

○ No required Event Custom Attributes
◉ Require these Custom Attributes (when applicable):

Custom Attributes
Do you have a valid cer... ▾

4. Which **Date and Time Controls** would you like to display?

| Event Restrictions | Event Configuration |

1. What **Event Form Configuration** will the Security Group have when **Creating an Event**?

Requestor – Student ▲▼

2. Do you want to select a **Default Scheduler** for events **created by this security group**?

◉ No Default Scheduler (use requestor as scheduler)
○ Use Selected Location's Associated Scheduler (when applicable)
○ Default Scheduler

3. Do you want to configure your own **Creation Success Message**?

Images: The Series25 Group Administration tool has settings for selecting configurations for each security group.

After creating or editing a custom Event Form configuration, you can put it to use by setting it as the config to use for certain security group(s) in the Series25 Group Administration tool. Use the **More** menu in the [top navigation bar]() in 25Live, then open the **Go to Tool** group to go to **Group Administration**.

See [Security Group Preferences Configuration]().

Default Settings

System Settings

General Settings	Event Save Email	Event Form Settings	Embedding	Blackout Management

Config Settings

Rule Settings

Default Settings

Event Quotas

Default Settings

Default Event State

Tentative ⬍

Copy Requestor
'Yes' will copy the event requestor value onto the new event, 'No' will default to the current user.

No 🔘 Yes

[Save]   [Cancel]

Image: The event form Default Settings are located in System Settings > Event Form Settings > Default Settings.

The Default Settings are configurations that are applied system-wide across all of your event forms.

- **Default Event State** – Adjust this to set the default event state for event forms that don't have a specified default event state.
  - *See [Event State Default]() to learn more.*
- **Copy Requestor** – When set to **Yes**, the event requestor on an event will copy over to the new event.