

Creating and Managing Custom Documents



Security Note: This Feature Requires Special Security Access

If you need permission to use this feature, contact your 25Live Administrator. In the [Series25 Group Administration tool](#), they can set Administrative: 4.0 *Event Document Creation and Management* to **Yes** to allow access to your security group.

Object Security policies are enforced when editing custom documents. See [How Security and Policy Settings Work Together](#)

To create documents, you must have access to the resources used in the document. These may include:

- *Event Document Creation and Management* = **Yes**
- *Manage Report Parameters and Schedule Reports* = **Yes**
 - *See note below about scheduling reports.*
- *Override Report Security* = **Yes**
- **OR**, you may have at least view permissions on the following reports (as they are listed in [Report Security in the Series25 Group Administration tool](#)):
 - Event Contract
 - Reservation Shell
 - Event Organization Shell
 - Events Table Builder
 - Reservations By Date Table Builder
 - Locations Table Builder
 - Resources Table Builder
 - Organizations Table Builder

If you don't have the necessary permissions, the "Create Document" button may be disabled or hidden.

What Can You Do With The Custom Document Feature?



The Service Agreement

Event Reference: 2020-AADRMS

This AGREEMENT, dated this 11th day of December, is intended to document the terms and conditions applicable to the use of facilities owned and/or operated by The University of Mary (indicated throughout this contract as VENDOR) by Diocese of Bismarck, a group or organization which is not part of the university or a part of a supporting or affiliated organization (indicated throughout this contract as CLIENT).

Image: Example of a custom event contract.

Users with appropriate permissions (See the [Series25 Group Administration tool help](#)) can easily create and edit custom documents (such as event contracts) by adding content for:

- Header (*top of the document*)
- Body (*middle/main section of the document*)
- Footer (*bottom of the document*)

This feature allows the creation of content more quickly and easily than creating a full custom report (which can now be reserved for creating more complex content). Custom content can include rich text, images, links, tables, and [many variables for including event information](#).

After creation, custom documents can be printed with events using the [More Actions section in the Event Details](#) view as well as included in emails.

Creating a New Custom Document

1. Go to the Document Management View in System Settings

The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).

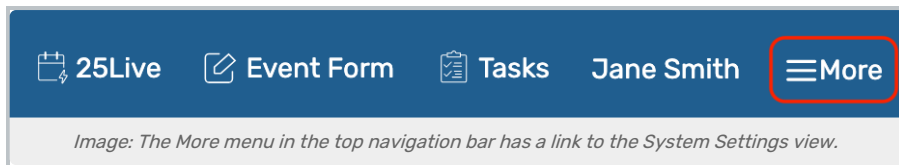
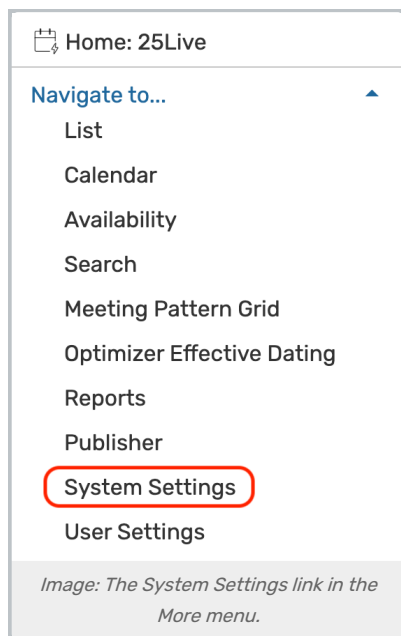
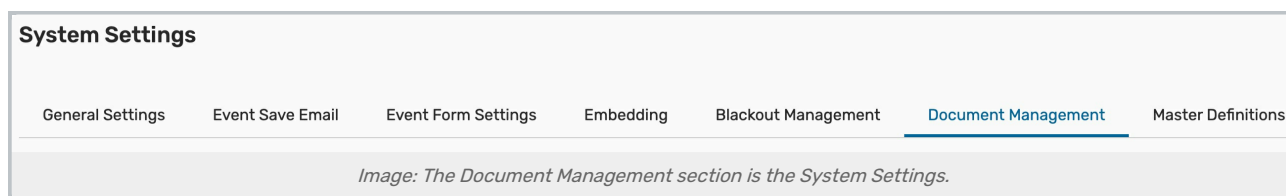


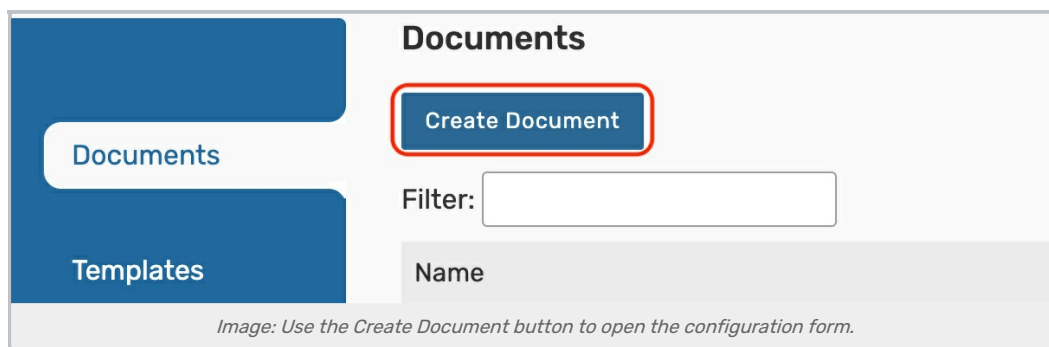
Image: The More menu in the top navigation bar has a link to the System Settings view.



Use the menu link to go to the System Settings view, then continue to the **Document Management** section.



2. Choose Create Document and Enter a Name



In the **Documents** section, tap the **Create Document** button. If you don't have the necessary permissions, this button may be disabled or hidden.

At the top of the form, enter a **Document Name**. This is an internal (not public) name used for organization.

Create Document

Document Name

New Document

Document Scope

Event Based

Output Filename

EventContract.pdf

Image: Enter a Document Name, Document Scope, and Output Filename.

3. Choose the Scope of the Document

Use the **Choose the scope of the document** dropdown menu to choose between:

- **Event Based** - the custom document will be scoped to the entire event
- **Reservation Based** - this option allows you to choose one reservation that the document will be scoped to and offers special reservation-based template variables to include in the content
 - *Example Use:* A confirmation or catering document that only displays resources and instructions for one occurrence.
- **Organization Based** - this custom document will be scoped to the event's organization
 - *Example Use:* A contract copy for each organization on an event that only displays the billed items and totals that belong to the receiving organization.
- **Invoice (Payment)** - this custom document allows you to create payment invoice documents for your events

These Excel documents each have a matching [standard report](#) in 25Live Reports. When one of the following scopes is selected, you will be presented with a [Table Builder](#) interface, which allows you to choose which columns will be output in the report. Each of these report scopes will generate an Excel-formatted output file with a .xml file extension.

- **Event Listing - Excel** - This report lists summary information for all events in an event search.
 - **Report Parameter(s):** Start Date, End Date, Event Search
 - *See the matching standard report for a listing of some of the options available for table columns.*
- **Reservations by Date - Excel** - This report shows event information for a specified date range.
 - **Report Parameter(s):** Start Date, End Date, Event Search, Location Search (optional)
 - *See the matching standard report for a listing of some of the options available for table columns.*
- **Location Listing - Excel** - This report lists specified locations.
 - **Report Parameter(s):** Location Search
- **Resource Listing - Excel** - This report lists specified resources.
 - **Report Parameter(s):** Resource Search

- **Organization Listing - Excel** - This report lists specified organizations.
 - **Report Parameter(s):** Organization Search
- **Invoice Details - Excel (Payment)** - This report lists pricing details related to payment activity.
 - **Report Parameter(s):** Start Date, End Date, Event Search

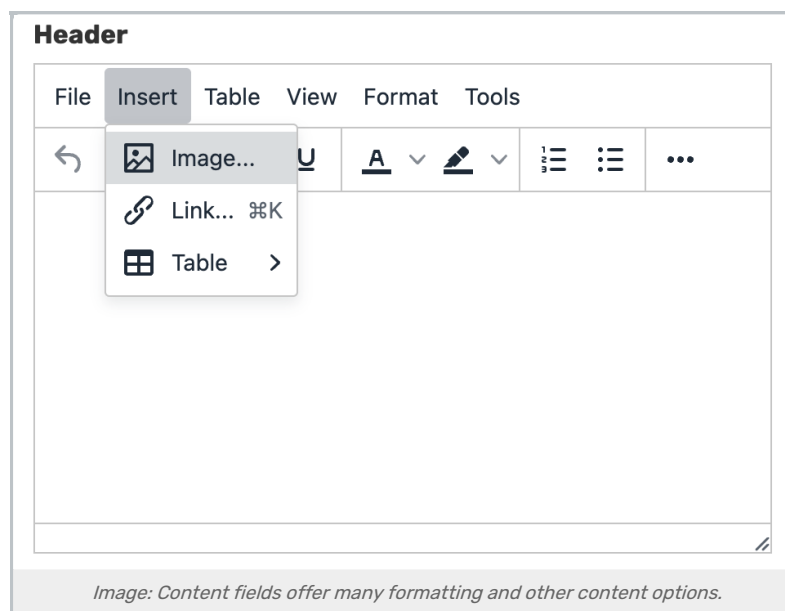
4. Update the Output Filename

This will be the name of the document when users download this report.

5. Enter a Description

Add a summary of the document in the **Description** field. This content is displayed in your list of documents to help you differentiate documents.

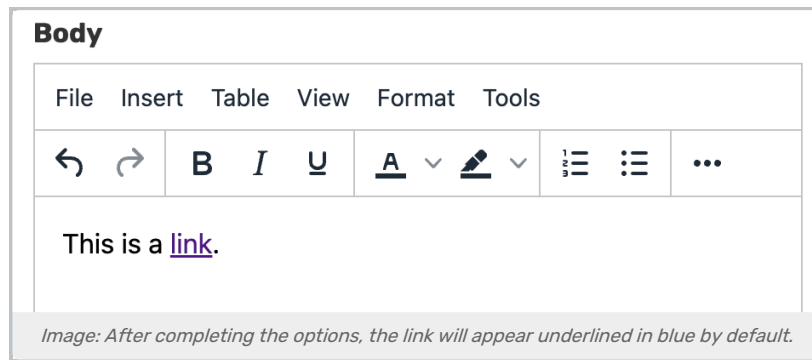
6. Complete the Header, Body, and Footer Sections




- The **Header** field controls what will show at the top of your custom document.
- Use the **Body** field to add content to the middle of your document.
- The **Footer** field will be displayed at the bottom of the document.

All three content fields feature many formatting options that are similar to what you find in other areas of 25Live as well as in many common internet applications for bold, italic, and changing font type and font size.

Adding Links



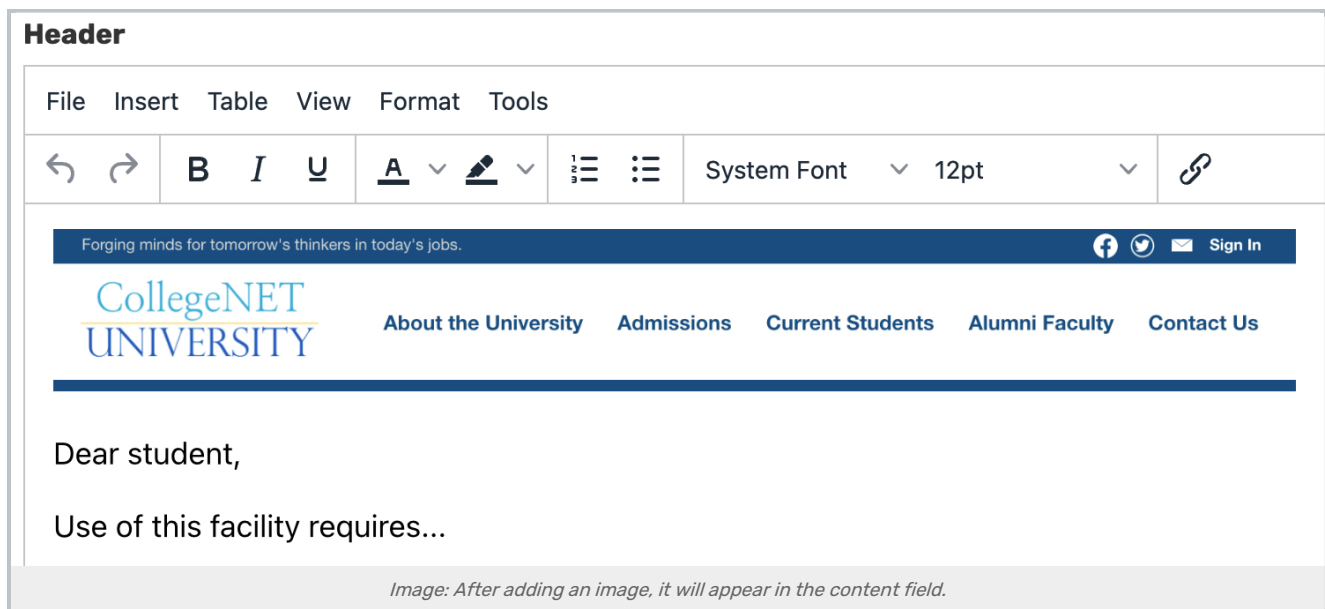
The link icon () provides the ability to create links on text or images. Simply highlight the text or image, enter the **URL** (address), title for the link (important for accessibility), and choose whether you want the link to open in the current window or a new window/tab.



Tip: Viewing Source Code

If you are very technical, you can use the **Tools > Source Code** option to edit the source code in any content field.

Adding Images



Use the **Insert** menu at the top of any of the fields, and choose the **Image** option to enter:

- The URL **Source** for the image (Once an image is uploaded to 25Live through System Settings > [Master Definitions > Images](#), the URL can be retrieved using the "Copy Link" button)
 - *Note: You may also use a URL to an image hosted on your institution's website(s).*
- The **Alternative description** is important for use of accessible screen readers
- The **Width** and **Height** of the image (if different than the auto-completed values)

The image will display within the field if the URL is correct. Click or tap on the image again to edit its options.

Using Tables

Table Properties [X]

General
Advanced

Cols: Rows:

Width: Height:

Cell spacing: Cell padding:

Border width: Caption: ☐ Show caption

Alignment: [v]

[Cancel] [Save]

Image: The table options include the size and alignment of the table.

At the top of the field, use the **Insert** dropdown menu and the **Table** option. You will then need to complete:

- The number of columns (**Cols**) and **Rows** needed in your table
- **Width** and **Height** of your table are expressed as a percentage or pixels (100% is the easiest recommendation)
- The number of pixels for a **Border width** (0 for none)
- If a **Caption** should display (useful for screen readers)
- And the **Alignment** to display the table in (useful if less than 100% width)

If you use the link to the **Advanced** section, for additional border and color options.

Using Template Variables

Template Variables [v]

Preview Document

Image: Use the down arrow on the right side of the section header to reveal Template Variable options.

Template variables are encoded values that will pull data dynamically into your custom documents, such as an event requestor's email, an event name, and custom variables.

[View List of Template Variable Examples](#)

You can expand the **Template Variables** section below the Header, Body, and Footer sections to easily choose and copy the exact syntax needed for variables.

If you choose to create a Reservation Based document, special template variables are available to you, which will appear in the Template Variables section.

Template Variables

Select event details you would like to include and copy the generated variable values into your template. Clicking a variable link will copy that value to your clipboard.

Standard Event Variables

Event ID

Event Variable: `{{Spro.vars.eventId}}`

Pre Event Variable: `{{Spro.vars.preEventId}}` [Copy to Clipboard](#)

Event Roles

Select an item

Custom Attributes

Select Custom Attribute

Formattable Date Variables

Select an item

Document Management General Variables

Select an item

Image: Variables can be generated by interacting with the elements in the Template Variables section.

6. Preview Your Document

You're encouraged to preview your document before finishing. 25Live allows you to preview your document using an internal **Event Reference**, which is in the format of:

<i>Four-digit year</i>	<i>Dash</i>	<i>Six uppercase letters</i>
2025	-	AAZHZA

This reference ID will pull information from the event to populate any template variables used in the content.

Preview Document

Event Reference: [Load Reservations](#)

Select the Occurrence

Date/ Time	State	Locations	Resources	Action
Sat Apr 03 12:00:00 - 16:00:00	Active	BAQ 100		Select
Sat Apr 17 12:00:00 - 16:00:00	Active	BAQ 100		Select
Sat May 01 12:00:00 - 16:00:00	Active	BAQ 100		Select
Sat May 15 12:00:00 - 16:00:00	Active	BAQ 100		Select

Image: Reservation Based documents allow you to choose reservations to preview.

If you choose to scope the custom document as Reservation Based, after entering the event reference ID, use the **Load Reservations** button to **Select** an occurrence to preview.



Note: Preview Data is Limited to 25 Records

Data you see in previews with long variable output is limited to 25 records for faster performance.

7. Save Your Document

Use the **Save** button to complete creating your custom document.

You are now ready to [utilize your custom document](#).

- For example, you can schedule non-object specific custom documents that are Excel-based, such as on a daily or weekly basis. Object-specific reports cannot be scheduled.



Tip: Add Object Security Rights

Document Management reports use Object Security. Use [Group Administration](#) > **Configure Report Security** to update which groups can view, edit, delete, and copy this report.

Editing Custom Documents

1. Go to the Document Management View in System Settings

The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).

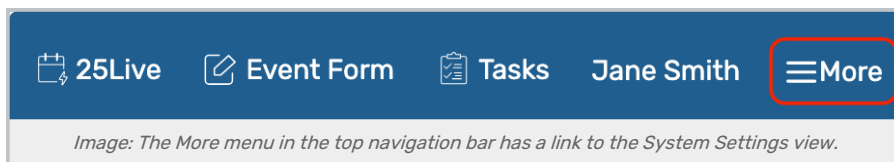


Image: The More menu in the top navigation bar has a link to the System Settings view.

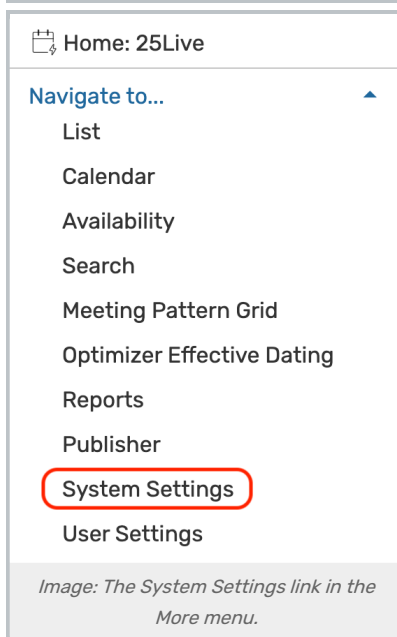


Image: The System Settings link in the More menu.

Use the menu link to go to the System Settings view, then continue to the **Document Management** section.

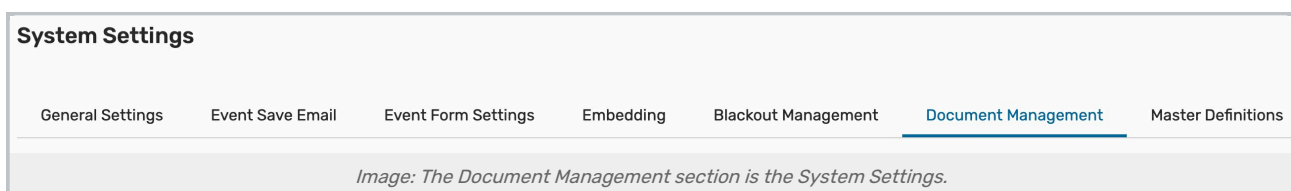
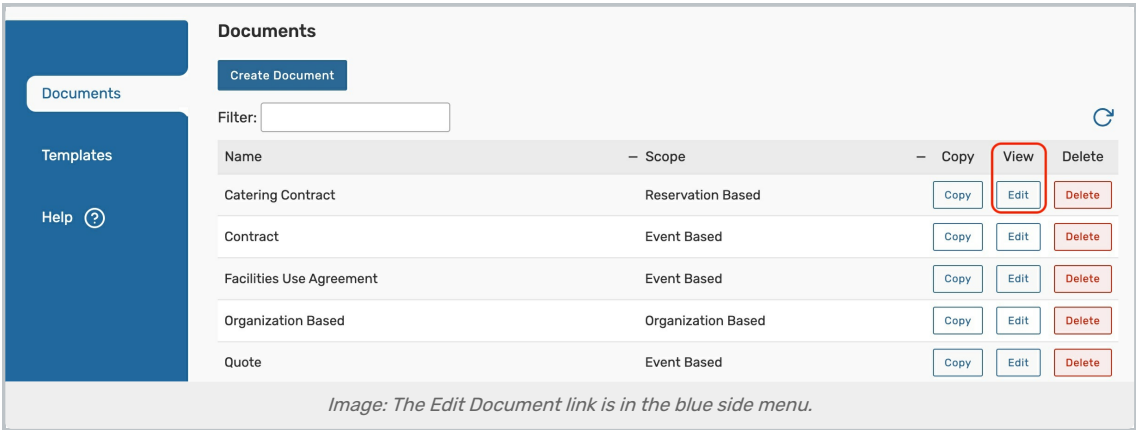


Image: The Document Management section is the System Settings.

2. Tap View



In the left-side, blue menu bar, choose **Documents**.

Tap **View** to edit the document.

3. Make Your Changes

Please refer to the above section **Creating a New Document** for descriptions of buttons and fields.



Changing the Document Scope Isn't Recommended

Be careful changing the document scope. If you used any special Reservation Based template variables in your content, and then change to an Event Based scope, your content may not appear as expected.

4. Preview Your Document

You can preview your document using an internal **Event Reference**, which is in the format of:

<i>Four-digit year</i>	<i>Dash</i>	<i>Six uppercase letters</i>
2025	-	AAZHZA

This reference ID will pull information from the event to populate any template variables used in the content.

5. Save Your Document

Use the **Save** button to save changes, or **Cancel** to discard all changes.

Deleting an Existing Custom Document

1. Go to the Document Management View in System Settings

The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).

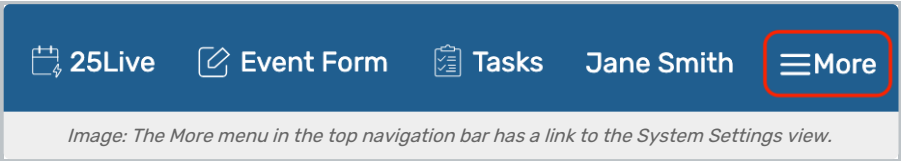


Image: The More menu in the top navigation bar has a link to the System Settings view.

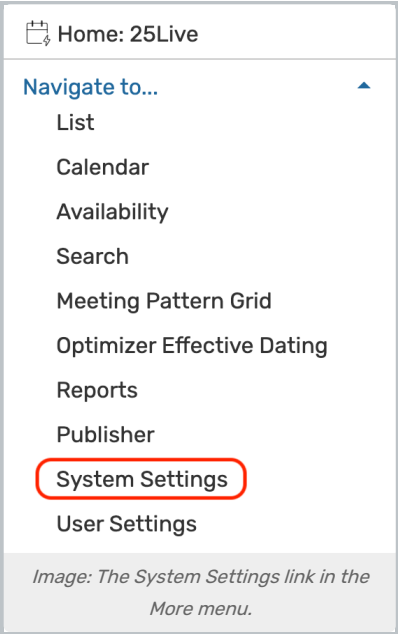


Image: The System Settings link in the More menu.

Use the menu link to go to the System Settings view, then continue to the **Document Management** section.

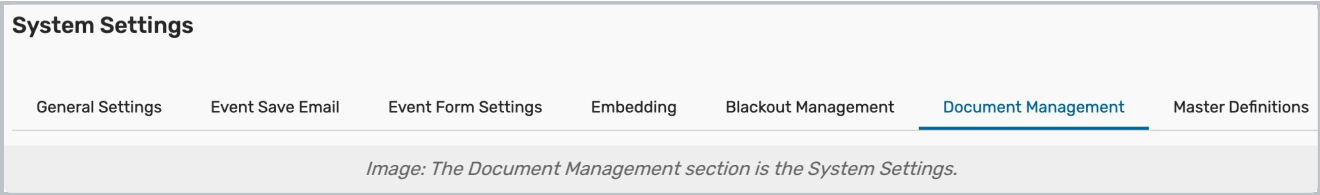


Image: The Document Management section is the System Settings.

2. Tap Delete

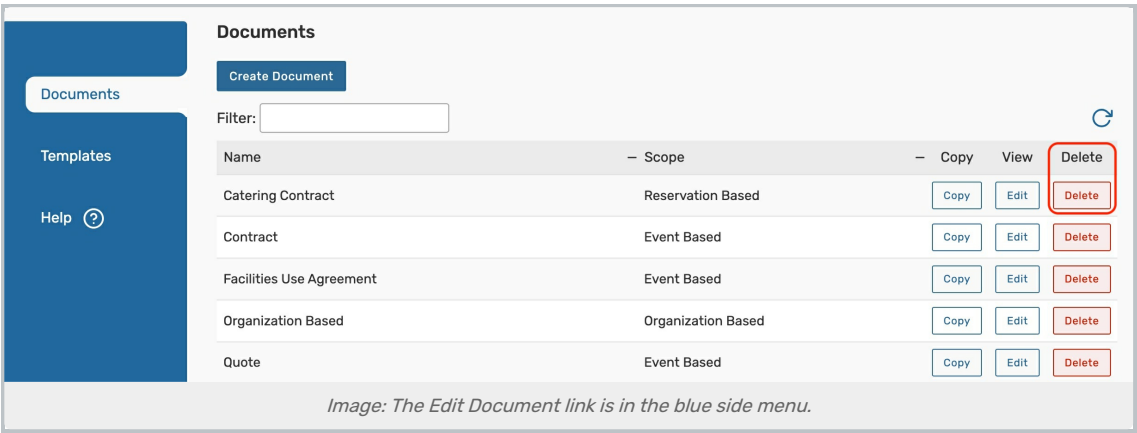


Image: The Edit Document link is in the blue side menu.

In the **Documents** tab, select the **Delete** button next to the document you want to permanently remove from 25Live.

3. Confirm

Confirm to save this change. *This action cannot be undone.*

Next, see [Utilizing Custom Documents](#).
