Creating and Managing Custom Documents

In This Article:

- What Can You Do With The Custom Document Feature?
- Creating a New Custom Document
- Editing Custom Documents
- Deleting an Existing Custom Document

Security Note: This Feature Requires Special Security Access

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

What Can You Do With The Custom Document Feature?

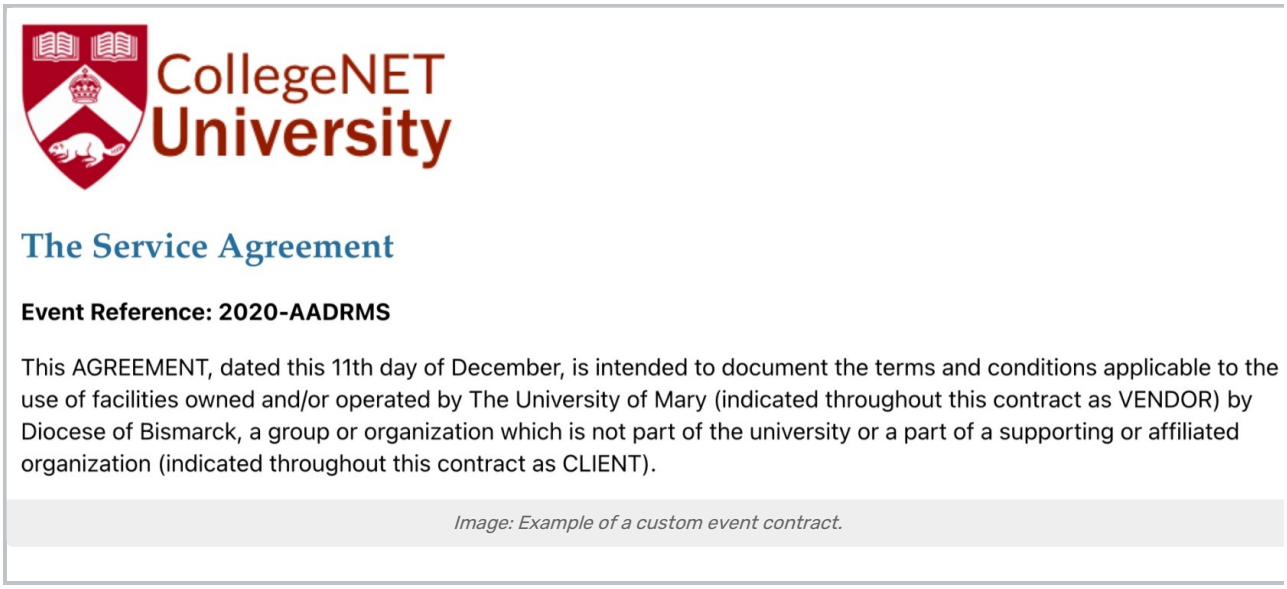

Image: Example of a custom event contract.

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

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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.

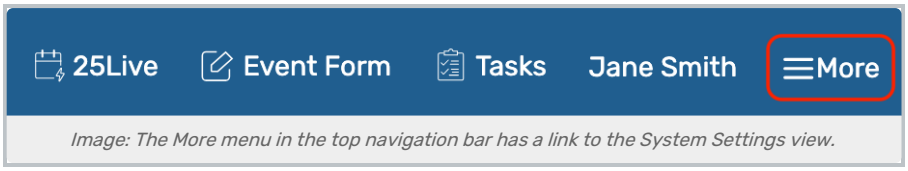

Image: The More menu in the top navigation bar has a link to the System Settings view.

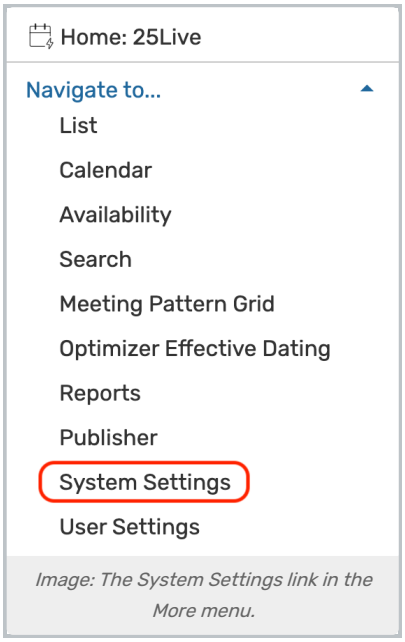

Image: The System Settings link in the More menu.

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

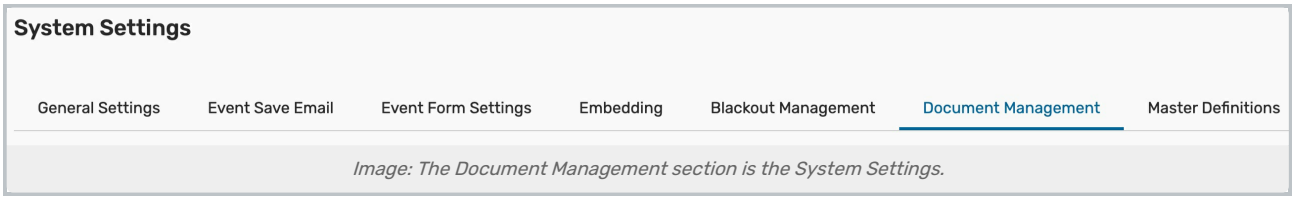

Image: The Document Management section is the System Settings.

2. Choose Create Document and Enter a Name

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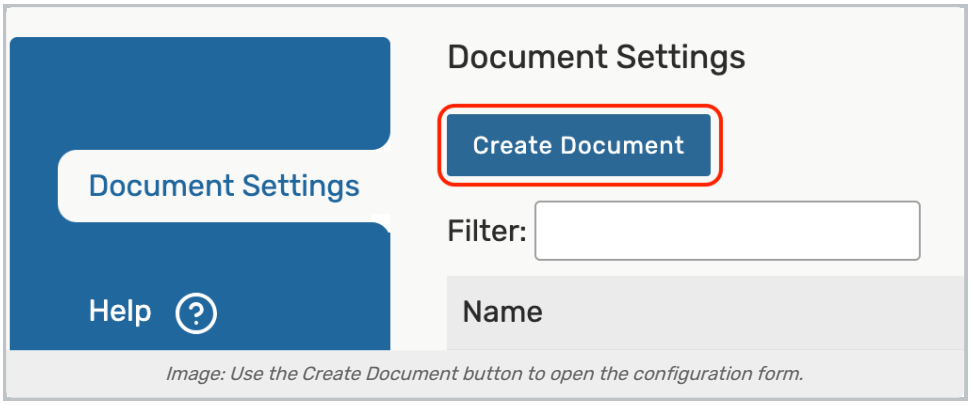

Image: Use the Create Document button to open the configuration form.

Tap the **Create Document** button.

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

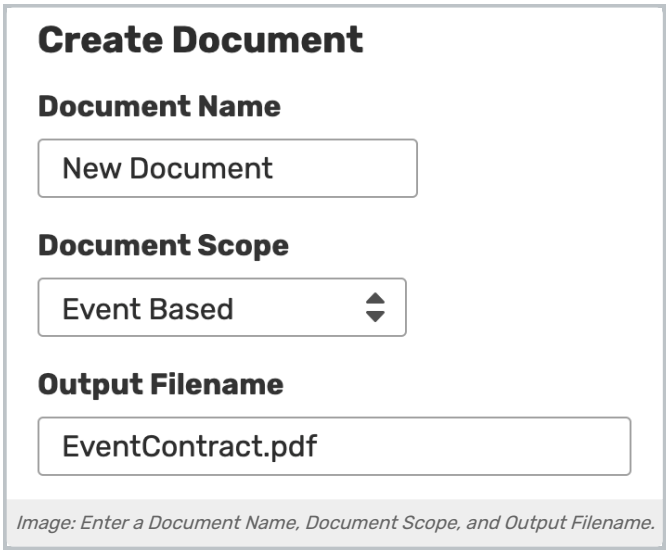

Image: Enter a Document Name, Document Scope, and Output Filename.

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.

4. Update the Output Filename

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

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5. Complete the Header, Body, and Footer Sections

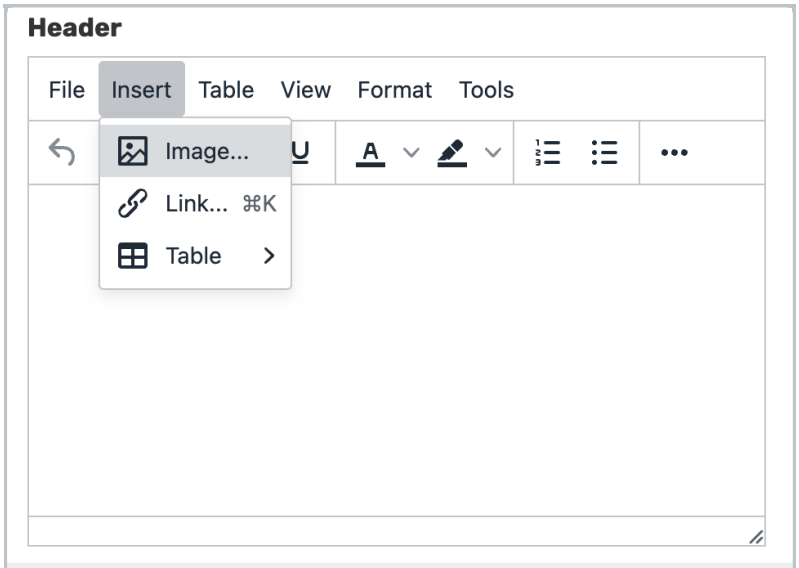

Image: Content fields offer many formatting and other content options.

- 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 display 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

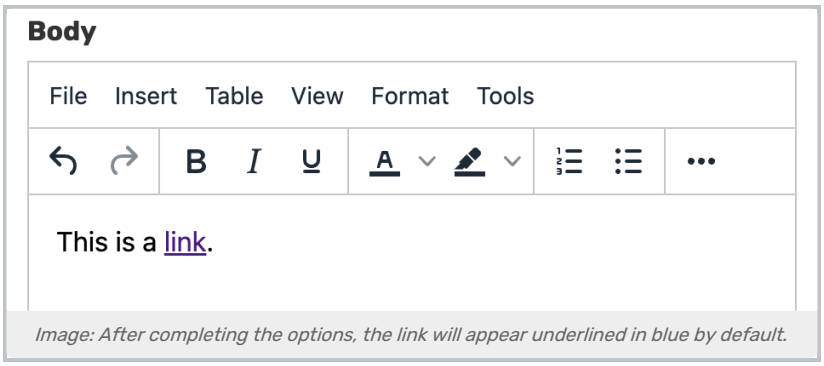

Image: After completing the options, the link will appear underlined in blue by default.

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.

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Adding Images

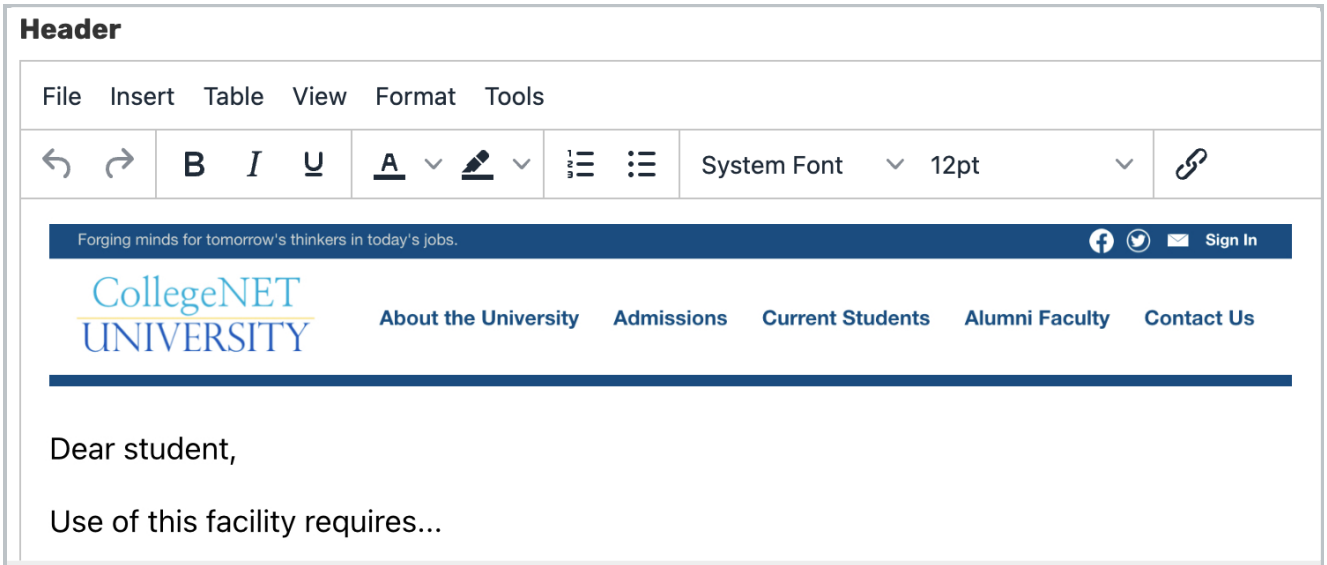

Image: After adding an image, it will appear in the content field.

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

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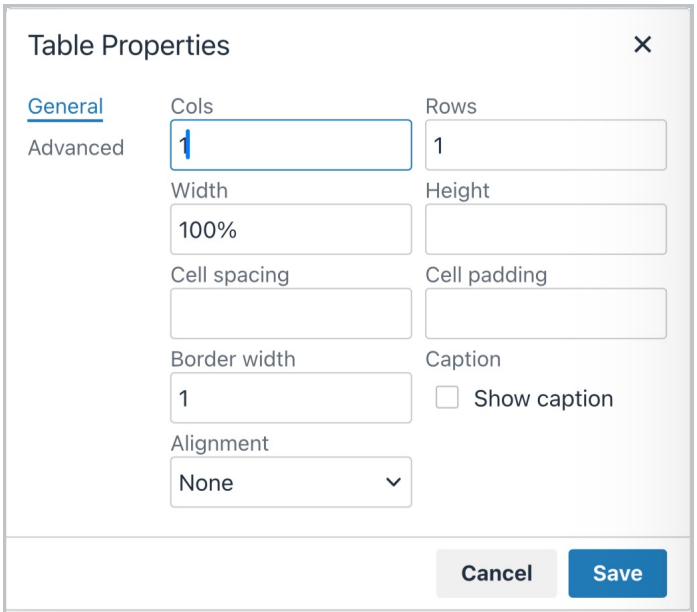

Image: The table options include the size and alignment of the table.

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

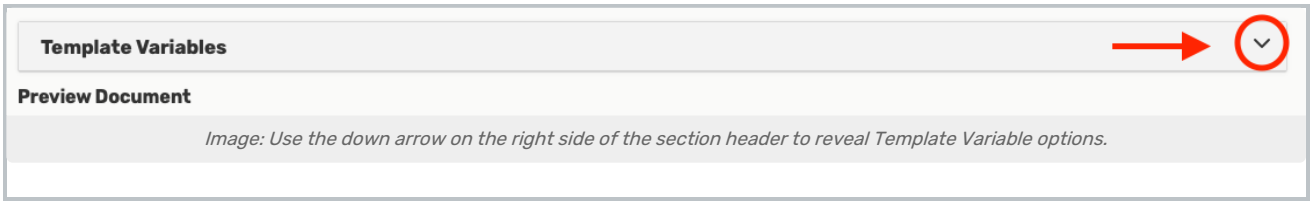

Image: Use the down arrow on the right side of the section header to reveal Template Variable options.

Template variables are encoded values that will pull data dynamically into your custom document, 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 chose to create a Reservation Based document, special template variables are available to you, which will appear in the Template Variables section.

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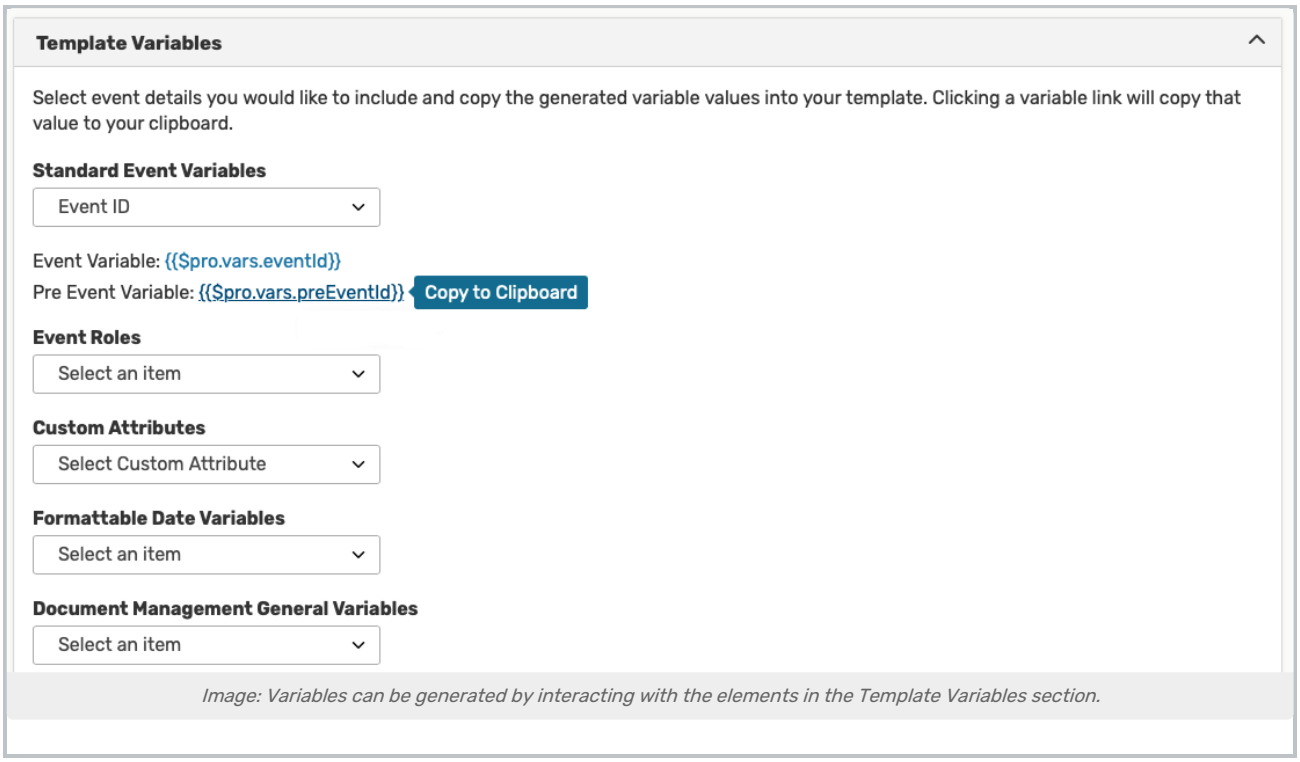

Image: Variables can be generated by interacting with the elements in the Template Variables section.

6. Preview Your Document

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

Four-digit year	*Dash*	*Six uppercase letters*
2024	-	AAZHZA

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

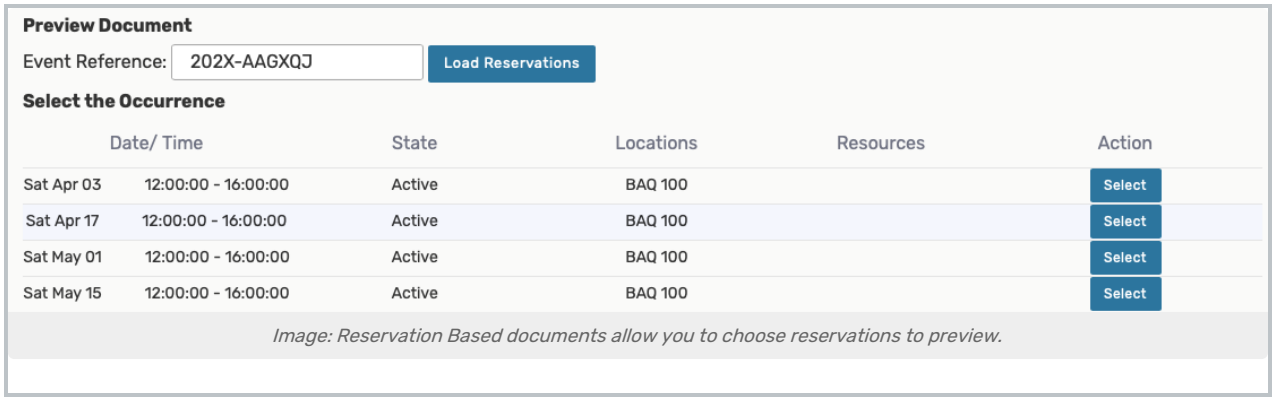

Image: Reservation Based documents allow you to choose reservations to preview.

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

7. Save Your Document

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

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You are now ready to utilize your custom document.

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.

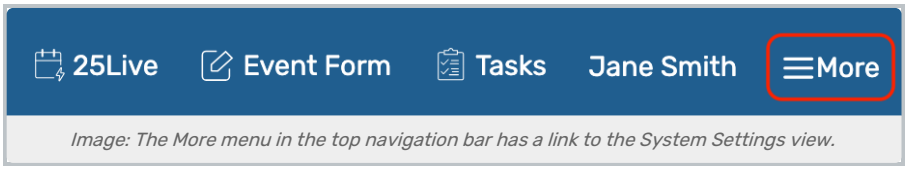

Image: The More menu in the top navigation bar has a link to the System Settings view.

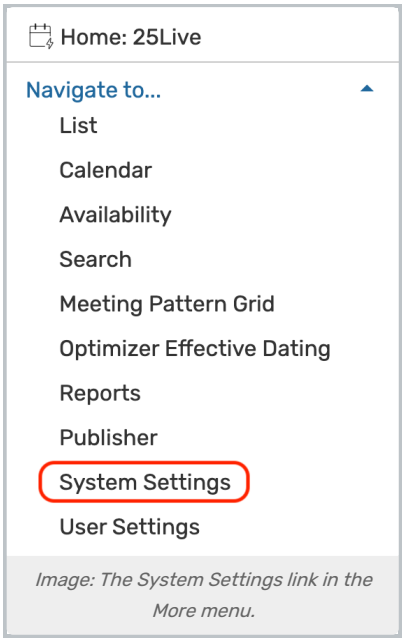

Image: The System Settings link in the More menu.

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

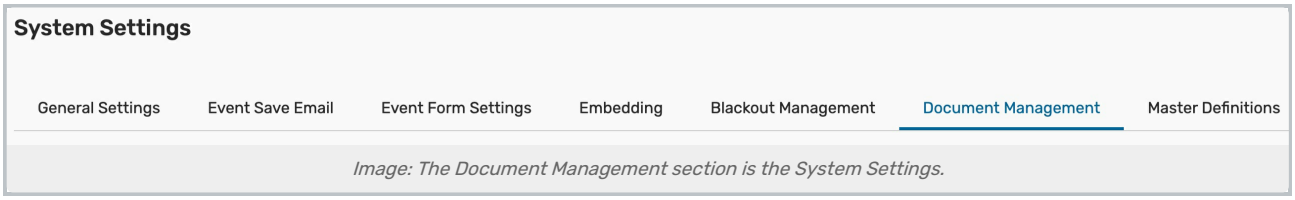

Image: The Document Management section is the System Settings.

2. Choose Edit Document and Optionally Edit Name

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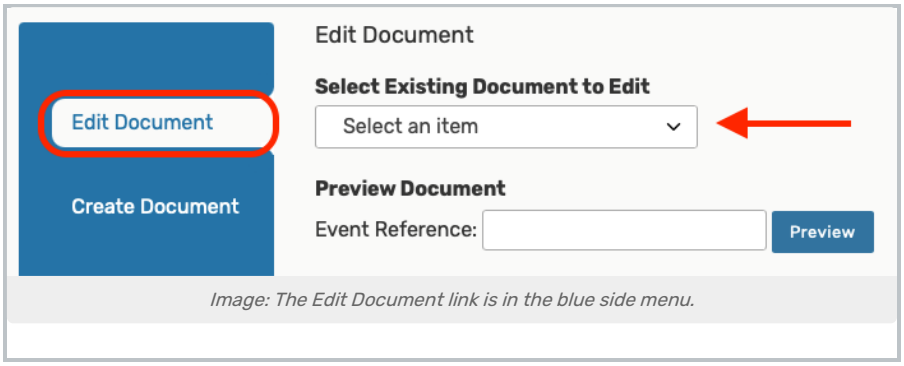

Image: The Edit Document link is in the blue side menu.

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

You can edit the internal **Name** of this custom document.

3. Optionally Change the Document Scope

While you have the option to use the **Choose the scope of the document** dropdown menu to change the edited custom document to be **Event Based**, **Reservation Based**, or **Organization Based.**

> **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, then change to an Event Based scope, your content may not appear as expected.

4. Edit the Header, Body, and Footer Sections

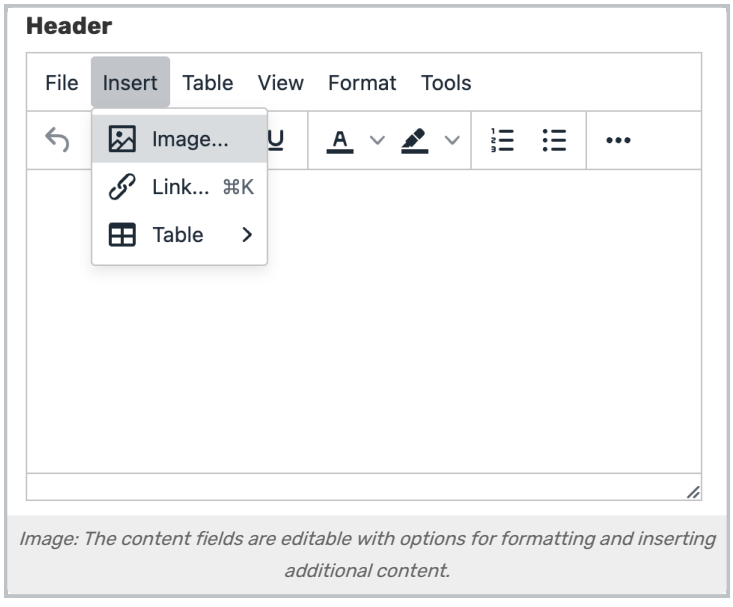

Image: The content fields are editable with options for formatting and inserting additional content.

Use the **Header**, **Body**, and **Footer** fields to edit the content of the document.

Please refer to the description of formatting options and objects you can insert in the content fields above, including template variables (see reference). Click or tap on any image to edit its options.

5. Preview Your Document

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

Four-digit year	*Dash*	*Six uppercase letters*
2024	-	AAZHZA

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

6. 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.

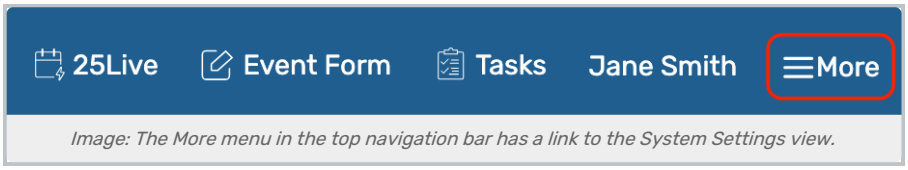

Image: The More menu in the top navigation bar has a link to the System Settings view.

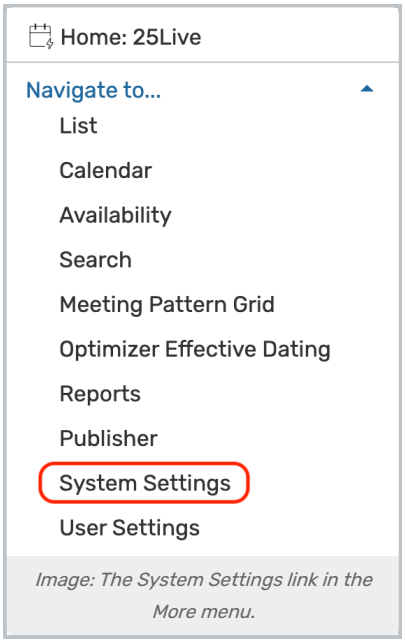

Image: The System Settings link in the More menu.

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

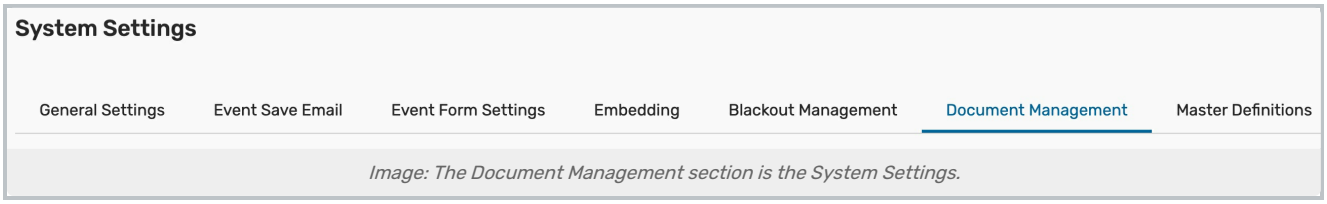

Image: The Document Management section is the System Settings.

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2. Choose Edit Document and Select

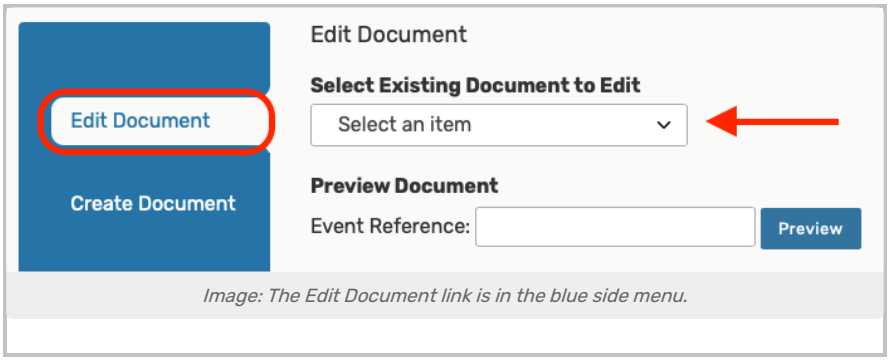

Image: The Edit Document link is in the blue side menu.

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

Use the **Edit an existing document** dropdown menu to choose which you want to edit.

3. Use the Delete Button

Scroll down to the bottom of the view, and use the **Delete** button. *Be sure before deleting, as this action cannot be undone.*

Next, see Utilizing Custom Documents.

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