

Event Form Rules: Adding Conditional Rules for the 25Live Event Form

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Security Note: This Feature Requires Administrative Access

This functionality requires special permissions set in Group Administration: Admin 17.0 *Update Event Creation and Editing Configurations*

In 25Live, administrators can create rules to dynamically add content (such as custom attributes, follow-up questions, and resources) on the [Event Form](#) based on conditional rules. This functionality can make your [Event Form configuration\(s\)](#) more interactive, personalized, easier for users to complete, and more accurate for approvers and administrators. Event Form rule content can be triggered to appear via:

- Association with the Event Type chosen on the Event Form
- Logical rules based on various Event Form values

The rules that administrators configure based on conditions apply for all security groups if the custom attributes section is included in the Event Form configuration associated with the security groups.

Watch An Introduction to Form Rules

Note: Additional features have been added since video publish.

Starting Out With Conditional Logic in 25Live

Conditional logic is based on an if/then structure, “If this, then do that.” In 25Live, the “this” is a condition, and the “that” is the target action(s).

When defining conditional rules in 25Live, you will be outlining, “if the condition is true, then show the target.” For example:

- **If *Condition*:**
 - Primary Organization Equals “Fraternity”
- **Then *Target*:**
 - Display Custom Attribute “Will Students Attend”

This structure allows you to collect additional information from or associate resources for Event Form users if your conditions are true, helping you more efficiently organize and schedule event requests.

Best Practices for New Conditional Logic Rules

- **Keep Your Rules Simple**
 - Start out with simple one-step rules to ensure you don't paint yourself into a logical corner
 - Beginning with simple rules can help you determine how useful any follow-up questions are for your institution's staff
- **Add Conditions One at a Time Then Test Each**
 - It's easy to get into a tangle of too many conditions and then try to untangle which part isn't working
 - Testing each condition as it's added will help you avoid the tangle
 - Then, add an additional condition and test each combination
- **Name Your Rules to Reflect the Logic**
 - If you look at the dropdown list of Rule Settings and don't know what each is, you'll waste valuable time
 - Add clear, descriptive names to your rules that reflect which conditions are involved
- **Organize and Write Out Your Conditions Ahead of Time**
 - Before building a root rule for custom attributes in 25Live, you can write or draw out your logical condition(s) and which target attribute you want to appear
 - This practice may help you see faults or additions, avoiding the need to re-build or troubleshoot later

Review Best Practices Via Video

Note: Additional features have been added since video publish.

How to Create Conditional Event Form Rules

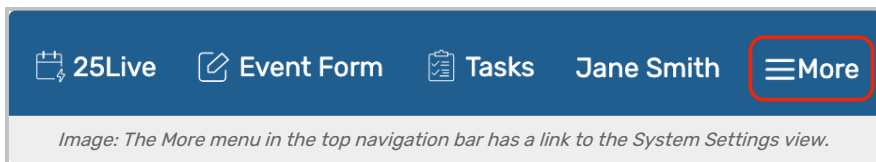
1. Identify All elements Needed and Check Your Logic

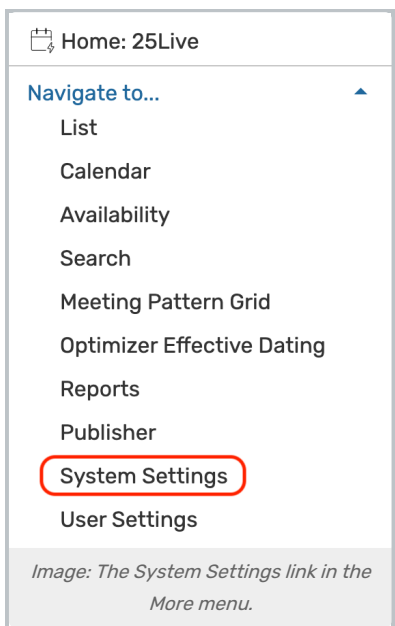
Before you begin, make sure you identify each source type (custom attribute, location, resource, or organization) you need to create both the condition(s) and the target for your new rule. You can [create one or more new custom attributes in 25Live](#) if needed.

In addition, as advised above, it's best to write and/or draw out your logical conditions ahead of time to have every step clear

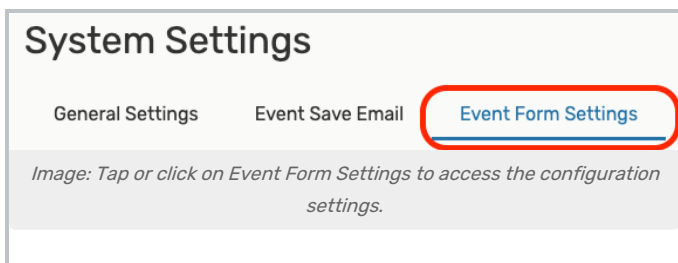
2. Open Event Form Rule Settings in System Settings

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





Use the menu link to go to the **System Settings** view.



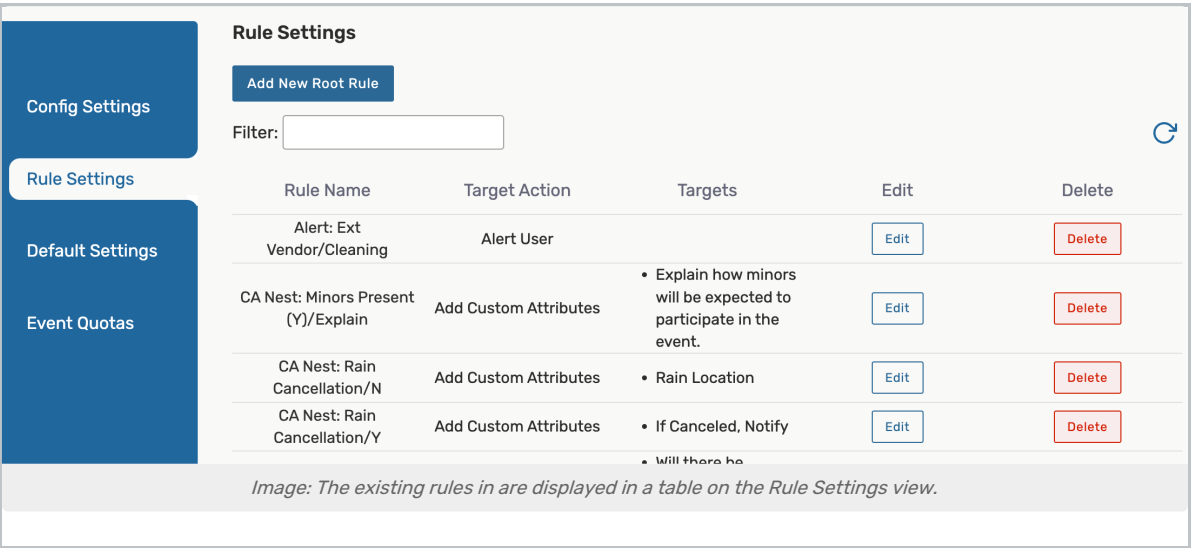
Go to the **Event Form Settings** section.

Video Overview: Working With Event Form Rules

Before reading through the instructions, take a moment to watch a demonstration of working with event form rules.

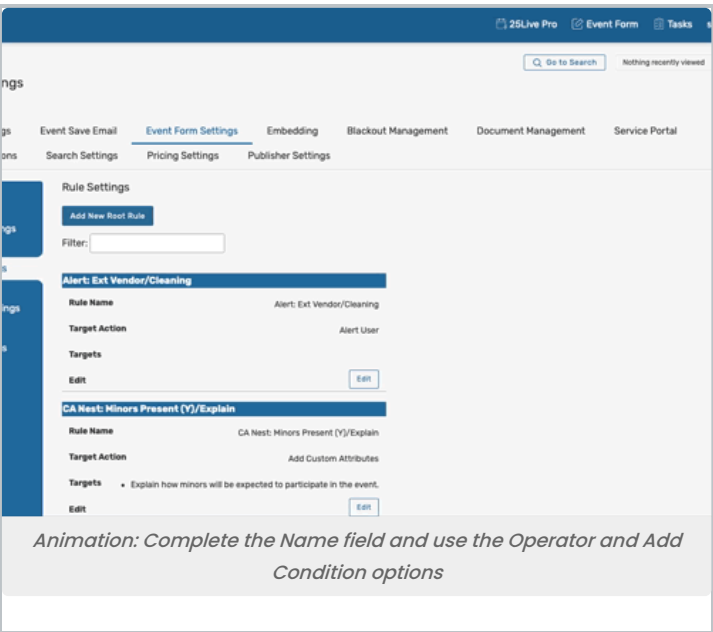
Note: Additional features have been added since video publish.

3. Add New Root Rule



In the **Rule Settings** view there is a list of existing rules to edit, or you can use the **Add New Root Rule** button to begin creating a new rule.

4. Name Your Rule, and Add Condition(s)



Enter a descriptive **Name** for your rule. The name will not display to users.

Use the **Add Condition** button to open the fields for completing a condition. Choose the **Source** from:

- Custom Attribute
- Location
- Resource
- Organization

- Security Group
- Event Type
- Event Category
- Requirement
- Calendar Requirement
- Event Details

Depending on the source chosen, the **Operator** or **Attribute** choices will adjust. Operator choice is important when adding additional conditions.

You can then choose one or more items for your selected **Source**.

Available Operators for Conditions

25Live helps you limit the operators to only those appropriate for the condition source type.

Object Type	Equals	Contains	In (Includes)	<, >, <=, >=	Between
Custom Attribute (Varies based on the attribute type chosen. See next table)	✓	✓	✓	✓	
Location			✓		
Resource			✓		
Organization			✓		
Security Group			✓		
Event Type			✓		
Event Category			✓		
Requirement			✓		
Calendar Requirement			✓		
Event Details (Expected/Registered Head Count, Date/Time of day)				✓	✓

Custom Attribute Type	Equals	Contains	In (Includes)	<, >, <=, >=
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Custom Attribute Type	Equals	Contains	In (Includes)	<, >, <=, >=
Date Time	✓			✓
Date	✓			✓
Time	✓			✓
Boolean	✓			
Organization			✓	
Space			✓	
Resource			✓	
Floating Point	✓			✓
Integer	✓			✓
Text	✓	✓	✓	
Long Text	✓	✓	✓	
URL	✓	✓	✓	

You can proceed to add additional conditions now, but you may want to first add a target and test before adding additional conditions.

5. Add Target(s)

Select the **Target Type**.



Note: Multiple Target Types Can Be Used

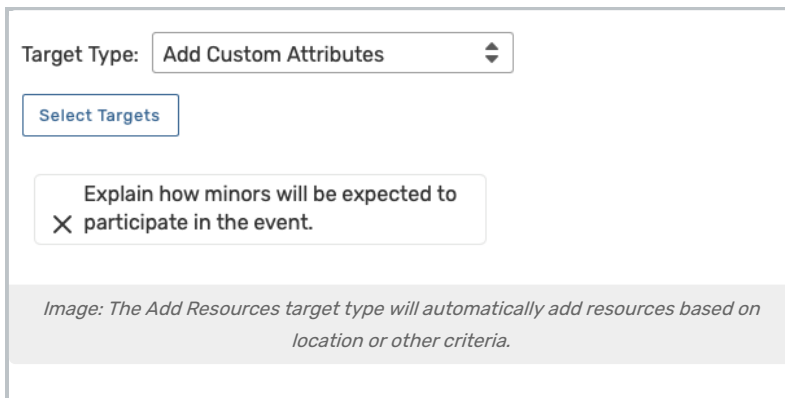
You can have multiple target types within the same event form configuration by combining more than one rule.

Target Type: Add Custom Attributes

You can set one or more custom attributes to appear on the Event Form with this target type. Use the **Select Targets** button to reveal a list of all attributes. Choose the attribute(s) you wish to display based on your condition. Use the **Done** button to save your choices.

Keep in mind that if an attribute is already shown on the form, it will not be added again (but it will be marked as required). Attributes can not be added to the form multiple times.

Target Type: Add Resources



The screenshot shows a configuration window for the 'Add Custom Attributes' target type. At the top, there is a label 'Target Type:' followed by a dropdown menu currently set to 'Add Custom Attributes'. Below this is a button labeled 'Select Targets'. Underneath the button is a text input field containing the placeholder text 'Explain how minors will be expected to participate in the event.' with a small 'X' icon to its left. At the bottom of the window, there is a greyed-out area containing the text: 'Image: The Add Resources target type will automatically add resources based on location or other criteria.'

This target type will automatically select one or more resources on the Event Form if the Resources section is showing on the form. Resource targets will not be added if the section isn't visible in the [Event Form configuration](#).

When a condition is met, the resource will be added to the event for all occurrences, but the user will be able to manually edit occurrences and quantities. While the user can remove the auto-added resource(s), they will be added back dynamically if the rules are still met in the Event Form.

After choosing this **Target Type**, use the **Select Targets** button to search for resources, then check any you want to add. Use the **Done** button to save your choices.

If the user adds additional occurrences to their event, the resource(s) will be added to those occurrences as well. However, if the user removes resource(s) from occurrences, the resource(s) will function like any manually selected resource choice.



Note: Resources Don't Depend On Event Type

While rules that are based on custom attribute values have a dependency on the chosen Event Type in the form, resources do not depend on that value. Resources will be added as soon as the condition(s) is met.

Target Type: Add Recommended Resources

Remove

Add Condition

Target Type: Add

Select Targets

Explain how to participate

Save Delete

Targets

✓ Select All ✕ Select None

☐ New_82

☐ OutlookCalendarId

☐ Would you like 25Live to notify Facilities staff about your event room setup needs?

☐ Club Advisor [Not Active]

☐ Academic Year

☐ Contact Name

☐ Contact Phone Number

☐ If Canceled, Notify

☐ Will alcohol be served?

☐ Alcohol Application Approved

☐ Insurance Required

☐ Do you have a valid certificate of insurance for your event?

☐ Conflict Decider [Not Active]

☐ Contract Received

☐ Fee Waiver Approved

☐ High Risk Event

☐ Hot Event Image [Not Active]

☐ Insurance Information Received

☐ Invoice Paid

☐ Last Year's Attendance

☐ Maintenance Person In Charge

Done

Image: When using the Add Recommended Resources target type, you will display a pre-defined search of suggestions for the Event Form user.

When choosing this **Target Type**, the Event Form user will see one or more recommended resources when conditions are met, presented as a pre-defined search. You may choose to display these suggestions alongside other resources or to only display recommended resources (see Event Form Rules: Adding Conditional Rules for the 25Live Event Form).

Use the **Select Targets** button to search for resources, then check any you want to add. Click on the **Done** button to save your choices.

Target Type: Add Requirement

Target Type: Add Requirement

Select Targets

Targets

✓ Select All ✕ Select None

☐ Check here if alcohol will be served at the event.

☐ Check here if the event will involve minors.

☐ Fire permit required

☐ Will there be outside food? (describe)

☐ Will you need security staff?

Done

Image: Using the Add Requirement target type will display the requirements section whether or not the requirements section is in the active event configuration.

The **Add Requirement** Target Type adds based on your selected criteria. Any added requirement is displayed on the Event Form even if the requirements section is not included in the current user's event configuration. If the current

configuration includes the requirements section, the user can check or uncheck the requirement. If the requirement section is not in the current user's event configuration, the user cannot remove the added requirement.

Target Type: Add Calendar Requirements

Target Type: Add Calendar Requirement

Select Targets

Targets

Select All

Select None

☐ Send to Alumni Calendar

☐ Send to Faculty Events Calendar

☐ Send to Athletic Calendar

☐ Send to Student Events Calendar

☐ Send to Campus Calendar

Done

Image: Use the Add Calendar Requirement target type to choose from available calendars.

The **Add Calendar Requirement** Target Type adds to the Event Form based on selected calendars. This target type behaves similarly as the "Add Requirement" option, but is conveniently separated for publishing.

Target Type: Add Categories

Targets

Filter By Tag

Select All

Select None

☐ 201801

☐ Fine Arts

☐ Performing Arts

☐ 201805

☐ Fundraiser

☐ Publish to vCalendar

☐ 201809

☐ GR

☐ Revenue Producing

☐ Academic Dates

☐ Import-2024

☐ Student Events

☐ Athletic

☐ LW

☐ Tiered Workflow

☐ Do Not Display on Web Calendars

☐ Non-AC-2024

☐ UG

☐ Faculty/Staff Events

☐ Open to the Public

☐ Upcoming Events

Done

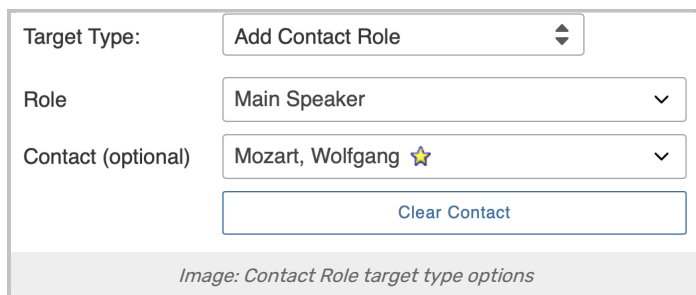
Image: Check the categories you wish to use as targets.

Choosing this target presents you with a list of category checkboxes to check. This target can be helpful with automatically tagging events for published calendar filtering or identifying external events to apply service fees.

If a user has insufficient permissions to certain categories/requirements, then they're still added to the event, visible in the event form but not the [event details view](#). A user with higher permissions will be able to see the

additions on the event details view.

Target Type: Contact Role

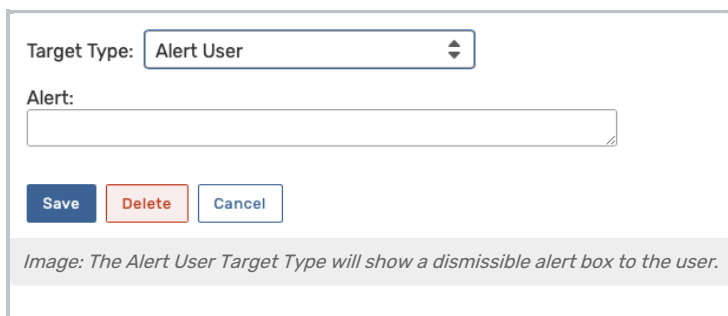


The screenshot shows a configuration form for the 'Target Type: Contact Role'. It includes three input fields: 'Target Type' with a dropdown menu set to 'Add Contact Role', 'Role' with a dropdown menu set to 'Main Speaker', and 'Contact (optional)' with a search select field containing 'Mozart, Wolfgang' and a star icon. Below these fields is a 'Clear Contact' button. At the bottom of the form, there is a caption: 'Image: Contact Role target type options'.

This target type allows you to choose a **Role** (from those [defined in Master Definitions](#)) and an optional **Contact** using a search select. You may also **Clear Contact** to choose again.

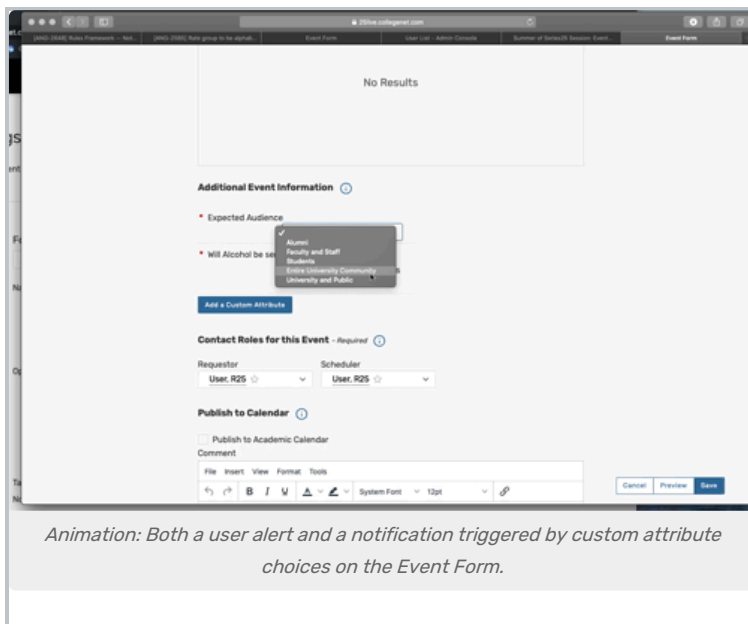
If your rule uses a "Scheduler" role as the target, once the rule is triggered, then the contact set in the rule is applied to the event, regardless of any potential location schedulers set on locations. If the location has no location scheduler and a default scheduler is being used in the [event form configuration](#), then that default scheduler will be added to the event, regardless of the rule. If there is no default scheduler and no location with a location scheduler, then the scheduler from the rule will be applied.

Target Type: Alert User



The screenshot shows a configuration form for the 'Target Type: Alert User'. It includes a 'Target Type' dropdown menu set to 'Alert User', an 'Alert:' text area for entering a message, and three buttons: 'Save' (blue), 'Delete' (red), and 'Cancel' (blue). At the bottom of the form, there is a caption: 'Image: The Alert User Target Type will show a dismissible alert box to the user.'.

Alert User will display a dismissible alert as soon as the criteria are met to trigger the rule. The message only displays once, whether the user dismisses the alert or changes a custom attribute value. Please note that this message is limited to 512 characters.



Tip: Example for Pushing Users to Express Scheduling For Specific Locations

If you want any events that use certain locations to only be scheduled using [Express Scheduling](#), you could create a conditional Event Form rule using the alert user option that asks users to please use Express Scheduling when they attempt to schedule an event in certain locations.

Target Type: Notify User

Target Type: Notify User

Notification:

Image: The Notify User Target Type will display a notification in the bottom corner of the application.

The Notify User option will display a notification in the lower-left of the application at the moment the criteria of the rule are met. The message will only display once even if the user toggles the trigger on/off.

6. Optionally Add Additional Conditions



Tip: You May Want to Test Your First Condition

While you can add more than one condition at a time, if you are new to conditional logic or want to be very careful and accurate, you can test the initial condition and target combination first.

Open the Event Form, choose an appropriate Event Type, and choose any of the values required by the condition. If the condition is met, the target attribute will be shown on the Event Form as required.

The screenshot shows a configuration window for an 'AND' operator. It contains two conditions stacked vertically. The first condition is for a 'Custom Attribute' with the text 'Will there be unaccompanied minors present at the event?'. The operator is set to '=' and the value is a toggle switch set to 'Yes'. The second condition is for an 'Organization' with the operator set to 'in'. Below the conditions are 'Remove' buttons. At the bottom, a note states: 'Image: In this example, the target will display if either fraternity is chosen AND if the location includes one of the identified choices.'

You can add multiple conditions for a single target or set of targets by using the **Add Condition** button. Then, set the outside **Operator** value following these guidelines:

- Use **and** if you need Condition A *AND* Condition B (and any additional) to all be met
- Use **or** if you only need one of Condition A *OR* Condition B to be met (and any additional)

You may also add one or more nested conditions using the **Add Nested Condition** button. This will add an additional layer of an outside operator and more buttons to add the nested conditions. You can add several layers of nested conditions, but use caution and test frequently.

See Example Conditions section below for more advanced nested condition examples.

7. Save Your Rule

Use the **Save** button to save your changes.

Buttons are also available to **Add New Rule** (*without first saving your changes*), **Delete** this rule, or **Cancel** creating or editing the rule (*without first saving your changes*).

Testing and Troubleshooting

No Custom Attributes Display

- Be sure an Event Type was chosen on the Event Form.

- While target custom attributes don't need to be tied to an event type in order to be displayed on the form, the user must still choose an Event Type first to start rules triggering.
- Is the custom attributes field included in the event form configuration for the user's security group?
 - Check the [Event Form configuration in System Settings](#).

No Resources Display

- Double check that all items were correctly chosen on the Event Form to meet conditions.
- Be sure the 25Live user has appropriate permissions for resources
- Check that the security group has the resource section in their form configuration

A Specific Target Attribute or Resource Is Not Displayed

- Double check that all items were correctly chosen on the Event Form to meet conditions.
 - Please note that Location Type Custom Attributes are not the same as Assigned Locations.
- Check the rule logic.
 - If you have added multiple conditions or nested conditions, be sure that the Event Form elements match the rule logic.
 - Additionally, be sure **all** conditions are met if an "and" operator is being used.
- Be sure the user's security group has rights to the resource

Example Conditions

Example 1: Two Conditions, Both Must Be True

- If Location in Arts 101, Art 102 AND Resource in Bongos
- Operator = AND
- Add Condition type = Location
- Add Condition type = Resource

Example 2: Two Conditions, One Must Be True

- If Custom Attribute 'Time' is greater than 11:00 pm OR Resource in Bongos
- Operator = OR
- Add Condition type = Custom Attribute
- Add Condition type = Resource

Example 3: Three Conditions, All Must Be True

- If Custom Attribute Date is greater than 1/1 AND Custom Attribute 'Payment Received' = Yes AND Custom Attribute 'Cancel If Bad Weather' = Yes
- Operator = AND

- Add Condition type = Custom Attribute
- Add Condition type = Custom Attribute
- Add Condition type = Custom Attribute

Example 4: Nested Condition

- If Custom Attribute 'Attendees' in "Students", "All" AND (Custom Attribute 'High Risk' = Yes OR Custom Attribute 'Entrance Fee Student' is greater than \$25.00)
- Operator = AND
- Add Condition type = Custom Attribute
- *Add Nested Condition*
 - Operator = OR
 - Add Condition type = Custom Attribute
 - Add Condition type = Custom Attribute

Example 5: Three Conditions With Nesting

- Custom Attribute Date is greater than 10/1 OR Custom Attribute Date is less than 5/1 OR (Custom Attribute High Risk = Yes AND Location in 'Arts 101')
- Operator = OR
- Add Condition type = Custom Attribute
- Add Condition type = Custom Attribute
- *Add Nested Condition*
 - Operator = AND
 - Add Condition type = Custom Attribute
 - Add Condition type = Location

Example 6: Multiple Nested Conditions

- If location in 'Arts 101', 'Arts 102' AND (Custom Attribute 'Payment Received' = Yes OR (Custom Attribute 'Cancel If Bad Weather' = Yes AND Custom Attribute 'High Risk' = Yes))
- Operator = AND
- Add Condition type = Location
- *Add Nested Condition*
 - Operator = OR
 - Add Condition type = Custom Attribute
 - *Add Nested Condition*
 - Operator = AND
 - Add Condition type = Custom Attribute
 - Add Condition type = Custom Attribute

