Event Form Rules Overview: Adding Conditional Rules to an Event Form

⊠ Click here to view related articles.

In This Article:

- [What Are Event Form Rules?](#)
- [Types of Form Rules And Conditional Logic Examples](#)
- [Best Practices for New Conditional Logic Rules](#)
- [Example Conditions](#)
- [Creating Event Form Rules](#)

🔒 **Security Note: This Feature Requires Administrative Access**

This functionality requires special permissions set in Group Administration: Administrative: 20.0 *Update Event Creation and Editing Configurations*

What Are Event Form Rules?

In 25Live, administrators can create conditional rules to dynamically add event content to the event form or push alert or notification message to the user during event creation. This functionality can make your [Event Form configuration(s)](#) more interactive, personalized, and easier for users to complete, and ensure that events are completed properly before reaching approvers and administrators.

Event Form Rules can be triggered based on selections users have made in the form, the security group the user is in, the event form they are using, whether they are creating or editing the event, if the form is incorrectly filled out, and more.

Note: Additional features have been added since video publish. Validation Rules (discussed below) are not mentioned in this video.

Types of Form Rules And Conditional Logic Examples

Event Form Rules are separated into Action rules and Validation rules. Both types are configured the same way, but Action rules are triggered based on selections that the user makes while working through the event form, while Validation rules are triggered upon saving.

Conditional logic is based on an if/then structure, "If this, then do that." In 25Live, the "this" is a condition based on a source, 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."

Action Rule Example

- **If** *Condition*:
  - Source: Custom Attribute
  - Attribute: "Will you be serving food?"
  - Operator: =
  - Value: Yes

- **Then** *Target*:
  - Add Custom Attribute: "Please indicate which vendor you'll be using for food."

Because this example shows an Action rule, the custom attribute "Please indicate which vendor you'll be using for food." will be added to the event form immediately after the user responds Yes to the "Will you be serving food?" custom attribute.

Validation Rule Example

- **If** *Condition*:
  - Source: Location, Items
  - Operator: none

- **Then** *Target*:
  - Prevent Save: Yes
  - Alert User: "Please select a location."

Because this example shows a Validation rule, the form won't check to see if the user skipped the location field until they press Save. Then, it will throw the alert message and prevent the user from saving.

Best Practices for New Conditional Logic Rules

- **Organize and Write Out Your Conditions Ahead of Time**
  - Before building a root rule, 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.

- **Keep Your Rules Simple**
  - Start out with simple one-step rules to ensure you don't paint yourself into a logical corner.
  - Determine if follow-up questions would be useful for your institution's staff.

- **Add Conditions One at a Time Then Test Each**
  - Test each condition as its added. Then test each combination.
  - If your rules don't behave as expected, this will help you avoid a situation where you have to remove conditions piece-by-piece to find out which part is broken.

- **Name Your Rules to Reflect the Logic**
  - Add clear, descriptive names to your rules that reflect which conditions are involved.

- If you are reviewing your existing rules and don't know what each one does, you'll waste valuable time.

Review Best Practices Via Video

Note: Additional features have been added since video publish.

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

Creating Event Form Rules

Please see Using Action Event Form Rules & Using Validation Event Form Rules for instructions on how to set up Event Form Rules in your event forms.