

Utilizing Custom Documents



Security Note

If you need access to use any of the features discussed in this topic, contact your 25Live Administrator. They can use the [Series25 Group Administration tool](#) to make changes.

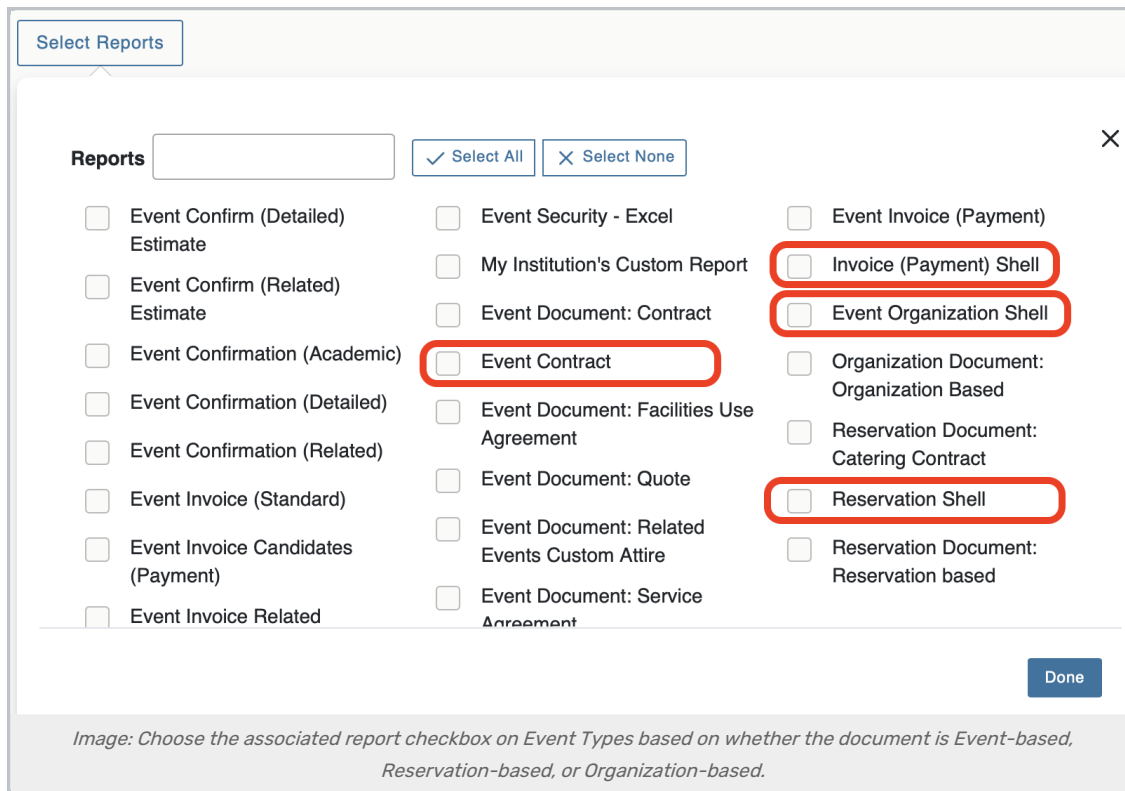
After [creating a custom document](#), follow the directions below to make it accessible from the More Actions menu in the [Event Details view](#).

To Implement a Custom Document

Add the Document to Your Event Types

For your document to display for an event, it must be associated with the event type used for the particular event.

- In 25Live, go to **System Settings > Master Definitions > Event Types > Hierarchy**.
- Locate your event type.
- Under **Reports**, check one of the following checkboxes based on which type of document you configured—event-based, reservation-based, or organization-based:
 - For event-based documents, check **Event Contract**
 - For reservation-based documents, check **Reservation Shell**
 - For organization-based documents, check **Event Organization Shell**
 - To allow for the printing of an Invoice Style table display, use **Invoice (Payment) Shell**



Select Reports

Reports X

<input type="checkbox"/> Event Confirm (Detailed) Estimate	<input type="checkbox"/> Event Security - Excel	<input type="checkbox"/> Event Invoice (Payment)
<input type="checkbox"/> Event Confirm (Related) Estimate	<input type="checkbox"/> My Institution's Custom Report	<input type="checkbox"/> Invoice (Payment) Shell
<input type="checkbox"/> Event Confirmation (Academic)	<input type="checkbox"/> Event Document: Contract	<input type="checkbox"/> Event Organization Shell
<input type="checkbox"/> Event Confirmation (Detailed)	<input type="checkbox"/> Event Contract	<input type="checkbox"/> Organization Document: Organization Based
<input type="checkbox"/> Event Confirmation (Related)	<input type="checkbox"/> Event Document: Facilities Use Agreement	<input type="checkbox"/> Reservation Document: Catering Contract
<input type="checkbox"/> Event Invoice (Standard)	<input type="checkbox"/> Event Document: Quote	<input type="checkbox"/> Reservation Shell
<input type="checkbox"/> Event Invoice Candidates (Payment)	<input type="checkbox"/> Event Document: Related Events Custom Attire	<input type="checkbox"/> Reservation Document: Reservation based
<input type="checkbox"/> Event Invoice Related	<input type="checkbox"/> Event Document: Service Agreement	

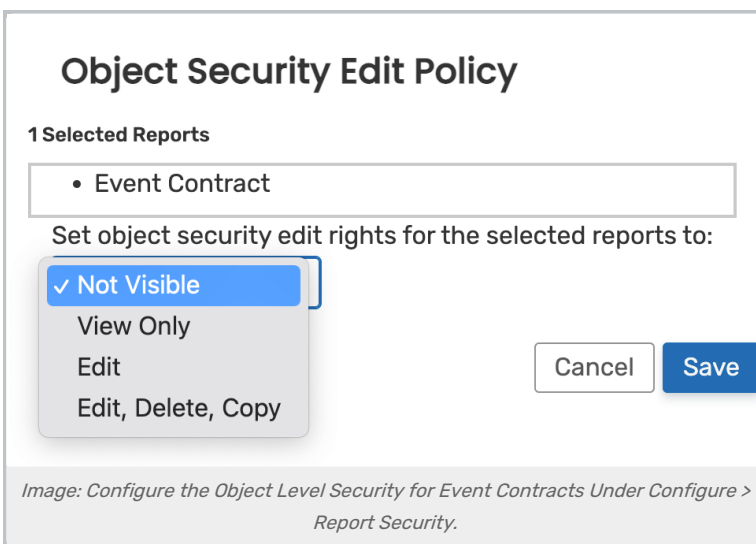
Done

Image: Choose the associated report checkbox on Event Types based on whether the document is Event-based, Reservation-based, or Organization-based.

- Use the **Done** button.

Grant View Permissions for Event Contracts

- In the Group Administration tool, go to **Configure... > Report Security**.
- Use the **Search** field to locate the associated report.
- Click the **Actions** button and set your security group(s) to have, at minimum, **View Only** rights.



Object Security Edit Policy

1 Selected Reports

- Event Contract

Set object security edit rights for the selected reports to:

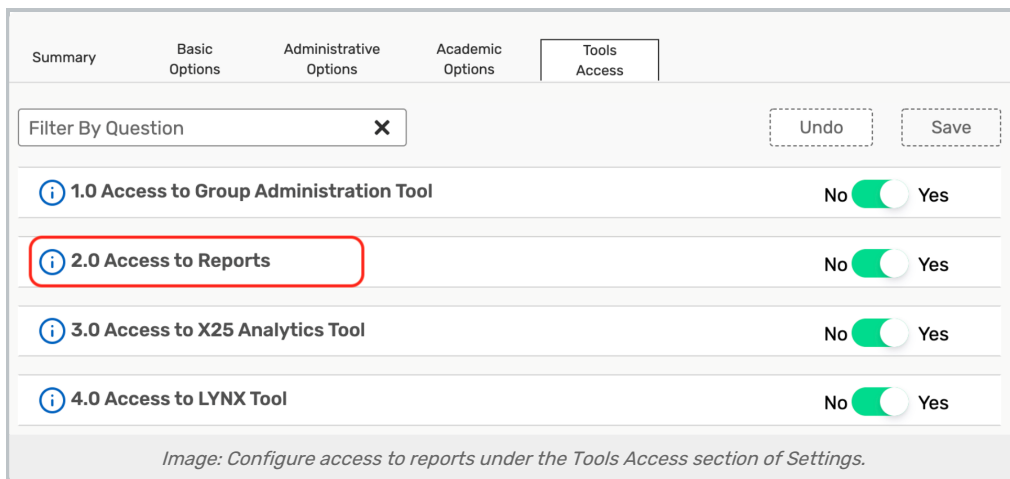
Cancel Save

Image: Configure the Object Level Security for Event Contracts Under Configure > Report Security.

- **Save.**

In order to print any reports, users will also need Functional Security rights.

- In the Group Administration tool, go to **Configure... > Security**.
- Under the Tools Access tab, make sure 2.0 *Access to Reports* = **Yes**.



Summary Basic Options Administrative Options Academic Options **Tools Access**

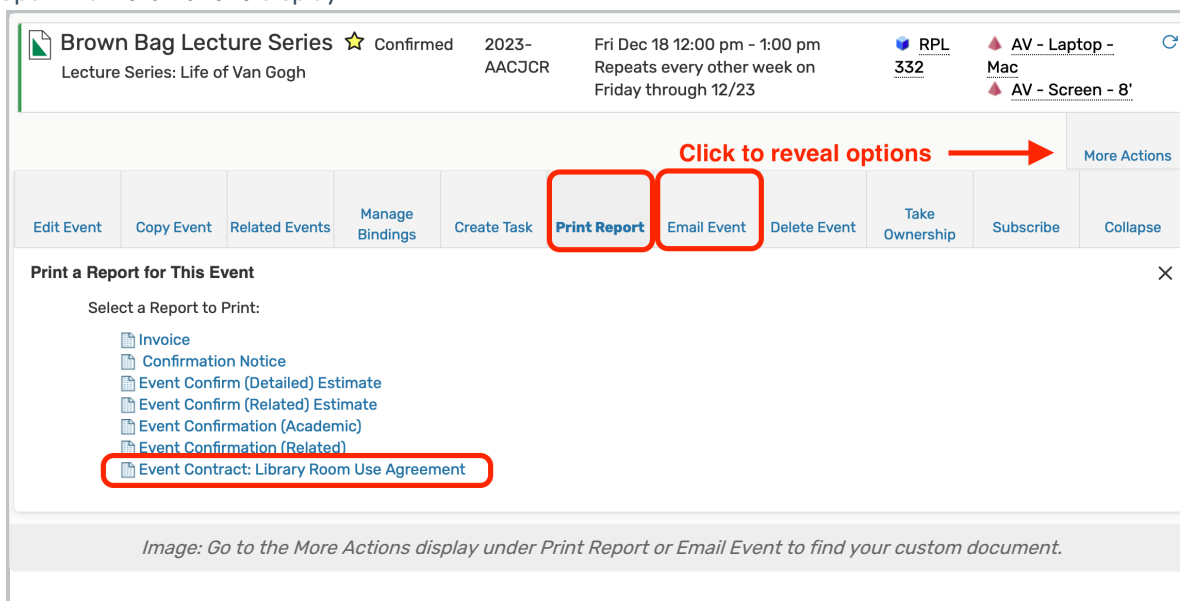
Filter By Question X Undo Save

1.0 Access to Group Administration Tool	No <input checked="" type="checkbox"/> Yes
2.0 Access to Reports	No <input checked="" type="checkbox"/> Yes
3.0 Access to X25 Analytics Tool	No <input checked="" type="checkbox"/> Yes
4.0 Access to LYNX Tool	No <input checked="" type="checkbox"/> Yes

Image: Configure access to reports under the Tools Access section of Settings.

In 25Live, Choose the Document in Event Details to Print or Email

- Within 25Live, go to the [Event Details view](#) for any event that uses one of the event types you associated with your document.
- Open the **More Actions** display.



Brown Bag Lecture Series ★ Confirmed 2023- AACJCR Fri Dec 18 12:00 pm - 1:00 pm Repeats every other week on Friday through 12/23 RPL 332 AV - Laptop - Mac AV - Screen - 8'

Click to reveal options → More Actions

Edit Event Copy Event Related Events Manage Bindings Create Task **Print Report** **Email Event** Delete Event Take Ownership Subscribe Collapse

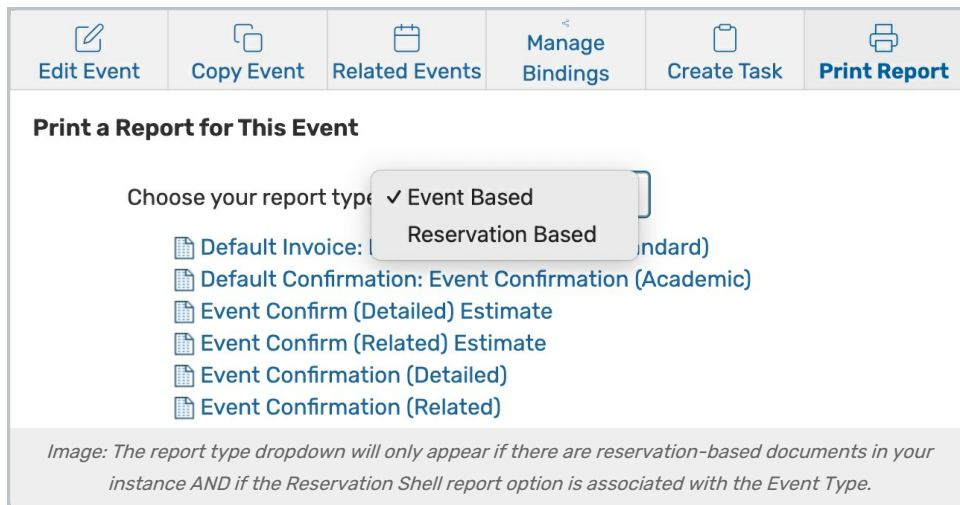
Print a Report for This Event X

Select a Report to Print:

- Invoice
- Confirmation Notice
- Event Confirm (Detailed) Estimate
- Event Confirm (Related) Estimate
- Event Confirmation (Academic)
- Event Confirmation (Related)
- Event Contract: Library Room Use Agreement**

Image: Go to the More Actions display under Print Report or Email Event to find your custom document.

- Choose **Print Report** to reveal the list of available reports. Event-based documents can also be emailed from the event using the **Email Event** button.
 - Your custom event or organization documents should be labeled: **Event/Organization Document: [name of your document]**.
 - **For reservation-based documents only**, you will need to select **Reservation Based** from the **Choose your report type** dropdown.



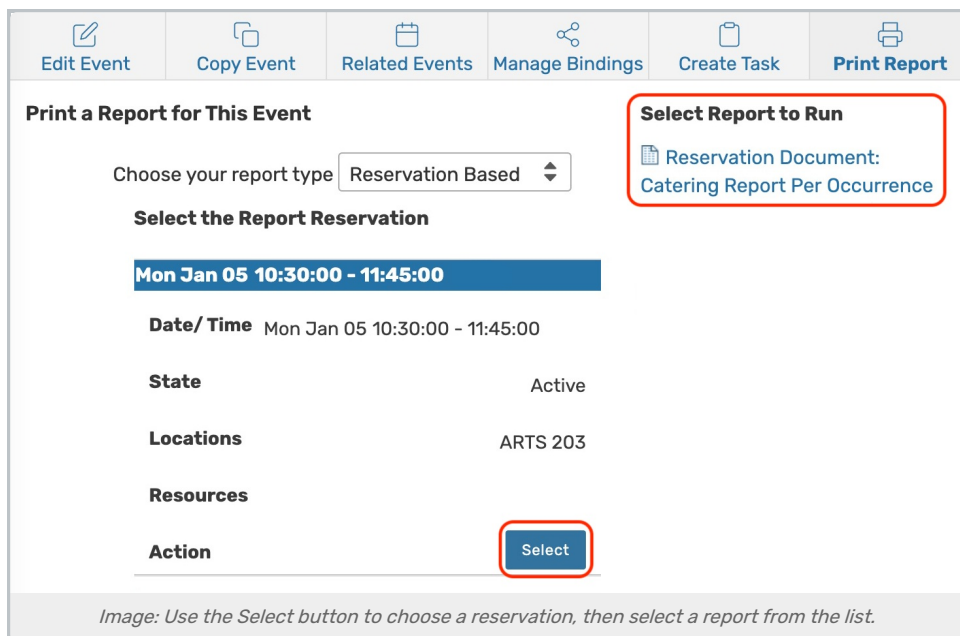
Print a Report for This Event

Choose your report type: ✓ Event Based
Reservation Based

- Default Invoice: (Standard)
- Default Confirmation: Event Confirmation (Academic)
- Event Confirm (Detailed) Estimate
- Event Confirm (Related) Estimate
- Event Confirmation (Detailed)
- Event Confirmation (Related)

Image: The report type dropdown will only appear if there are reservation-based documents in your instance AND if the Reservation Shell report option is associated with the Event Type.

- Next, you will need to select the reservation that you'd like to run the report for.
- Finally, select the report to run.



Print a Report for This Event

Choose your report type: Reservation Based

Select Report to Run

- Reservation Document: Catering Report Per Occurrence

Select the Report Reservation

Mon Jan 05 10:30:00 - 11:45:00

Date/ Time Mon Jan 05 10:30:00 - 11:45:00

State Active

Locations ARTS 203

Resources

Action Select

Image: Use the Select button to choose a reservation, then select a report from the list.

Scheduling Custom Documents

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

Troubleshooting

- If a user cannot see a custom document in the Event Details view, double-check their security group's settings in the 25Live Group Administration to ensure their group has at least view rights for the event and the report/document.
- Then, also check again to be sure that the associated report checkbox is checked in the **Reports** section for the

Event Type being used in the event. (See the "Add the Document to your Event Types" section above.)
