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.

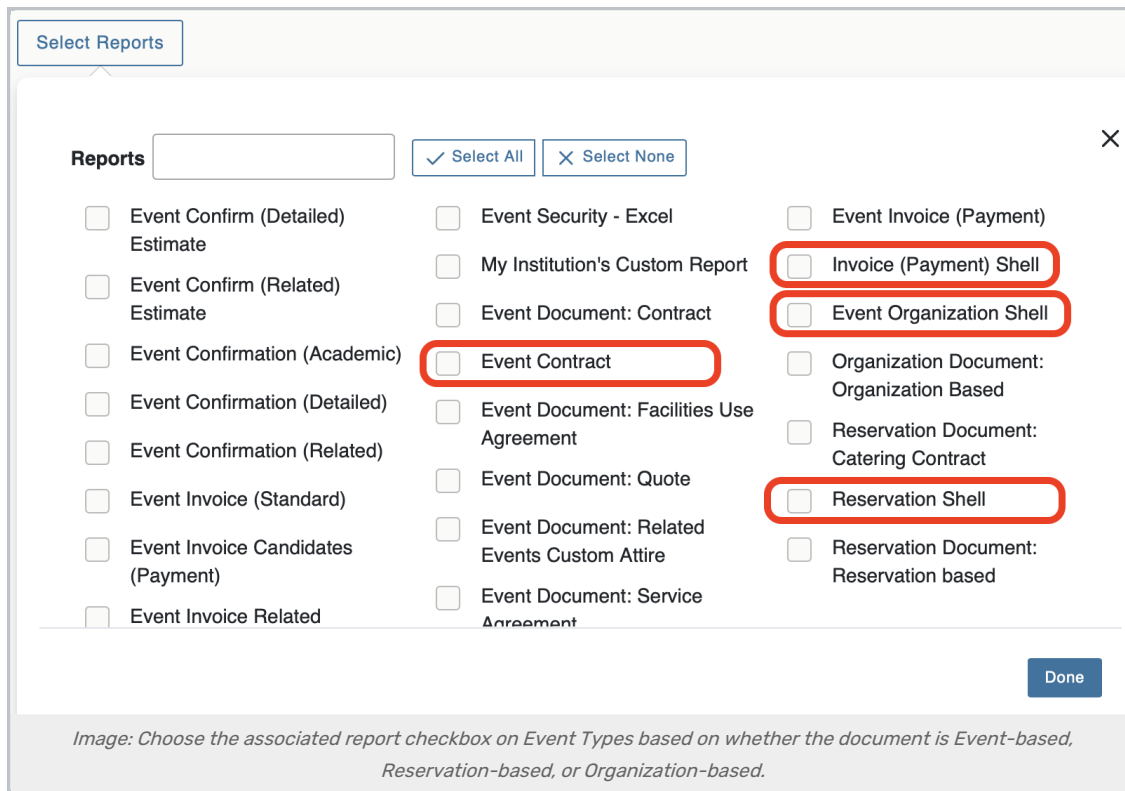After creating a custom document, follow the directions below to make it accessible from the More Actions menu in the Event Details view.

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**
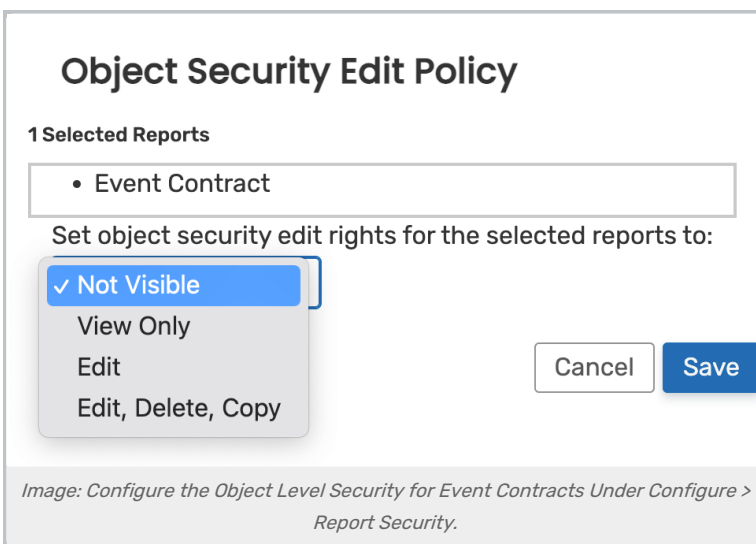   - To allow for the printing of an Invoice Style table display, use **Invoice (Payment) Shell**

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.
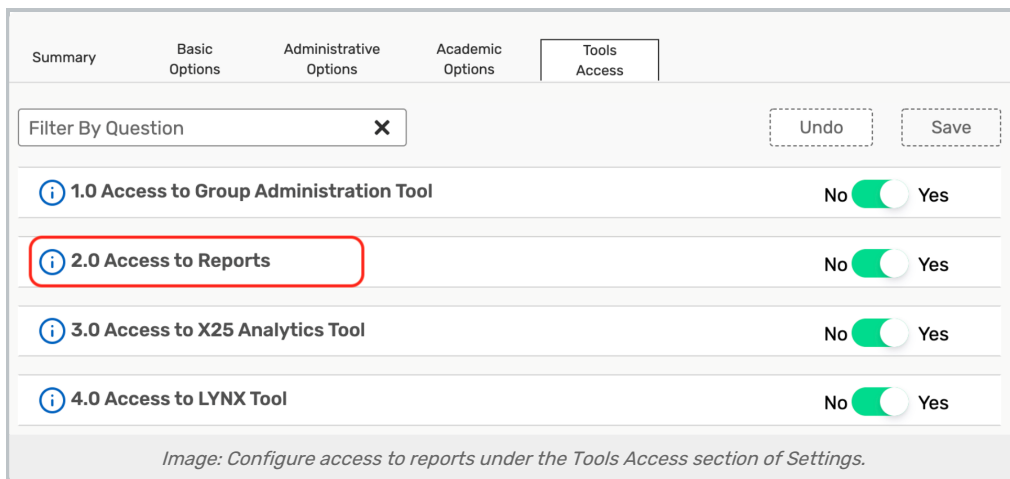

Image: Configure the Object Level Security for Event Contracts Under Configure > Report Security.

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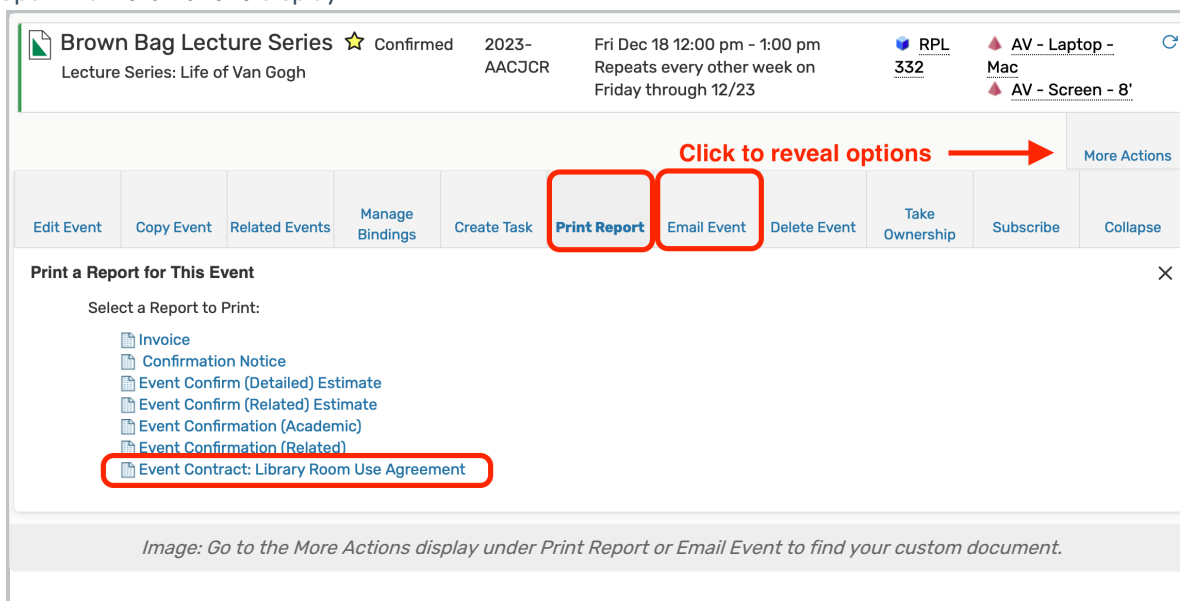
Image: Configure access to reports under the Tools Access section of Settings.

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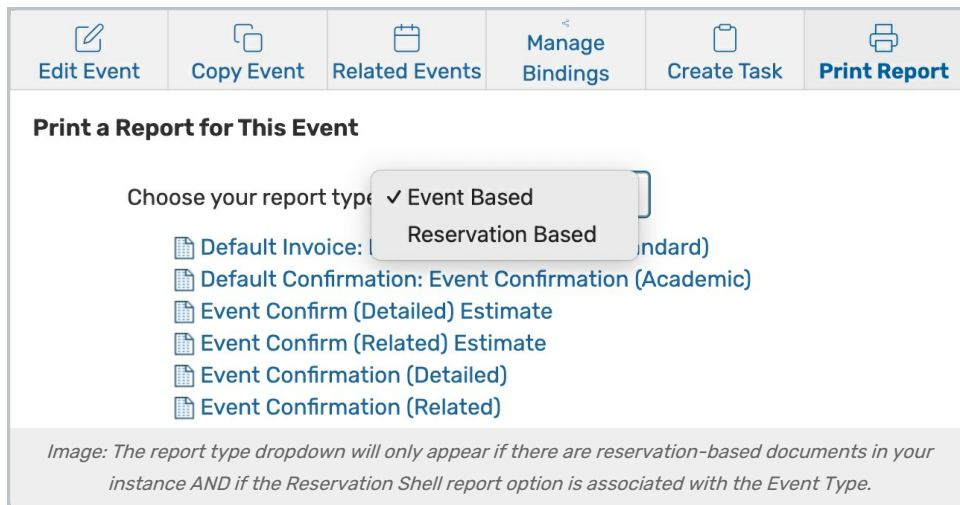
Image: Go to the More Actions display under Print Report or Email Event to find your custom document.

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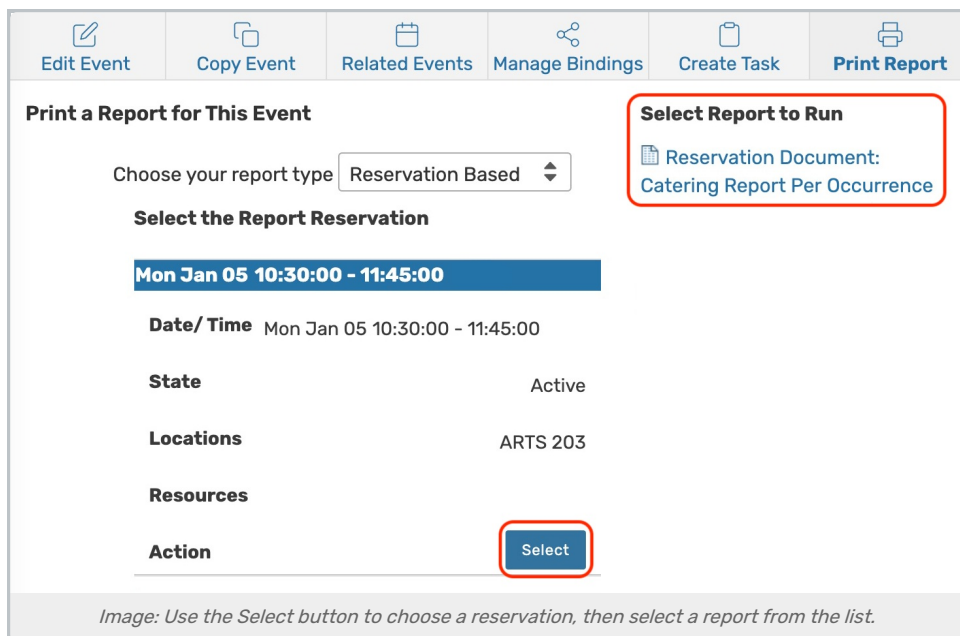
Image: The report type dropdown will only appear if there are reservation-based documents in your instance AND if the Reservation Shell report option is associated with the Event Type.

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

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.)