

Event Save Email: Creating, Copying, and Editing Scenarios



Security Note

To access Event Save Email configurations, users will need the following permission in place for their security group in [Group Administration](#): **Administrative: 20.0 Update Event Creation and Editing Configurations = Yes**

Event Save Email allows 25Live administrators to set up scenarios outlining the rules under which custom emails will be sent. Once you specify all your desired parameters, you can choose or create email templates, including report attachments. One or more emails can be triggered upon event save, either when creating or editing.

For example, you can create the following complex email triggers with just one scenario and two templates.

If:

- A member of the Requestor - Faculty and Staff **Edits** an event
- With **Event Type** Meeting
- And the **Event State** is Confirmed

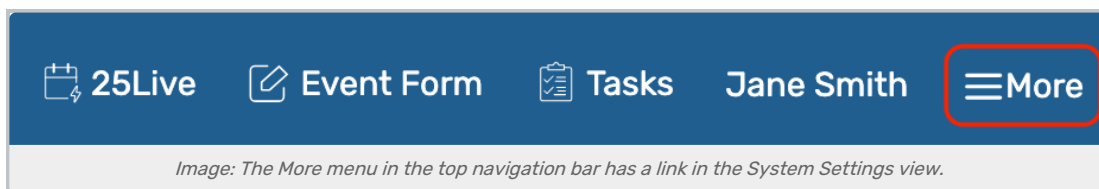
Then:

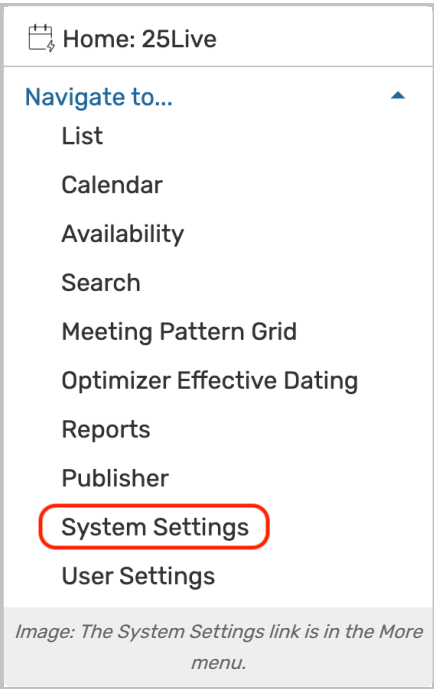
- **Send** the [email template](#) with the Occurrence List to the **Scheduler** and/or create a [to do based on an associated template](#)
- And email the **Requestor** the Confirmation Report

How to Create a Scenario

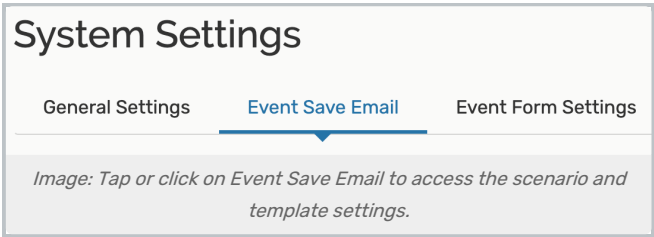
1. Go to the Scenario Settings From the System Settings

Open the **More** menu and select **System Settings**.





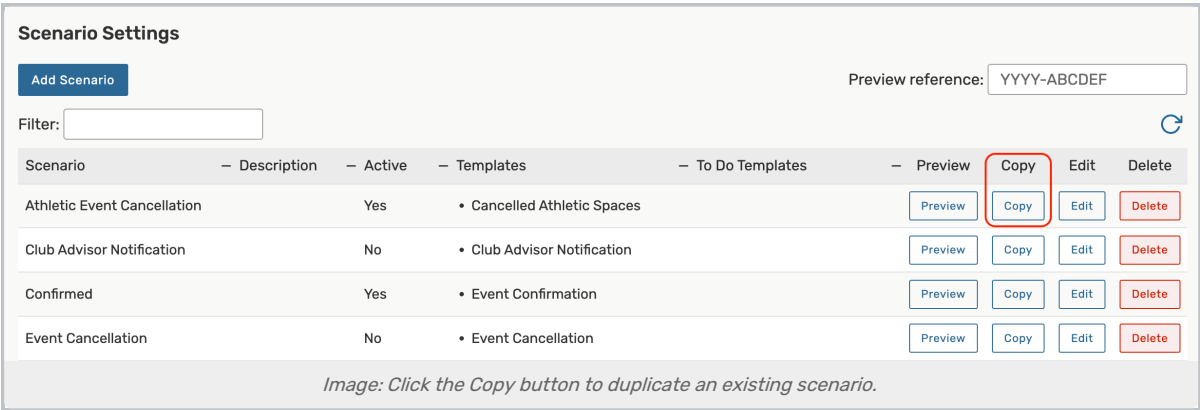
Then tap or click on **Event Save Email** to reveal the section.



Open the **Scenario Settings** from the left-hand menu of the **Event Save Email** section.

2. Copy an Existing Scenario or Create a New One

If you'd like to use one of your existing scenarios as a base to create a new scenario, select the **Copy** button in the row of the existing scenario you'd like to copy. Most scenario information fields will populate for you to edit in your new copy.



Otherwise, to create a new scenario, select the **Add Scenario** button.

3. Configure the Scenario

Create Scenario

Active:


No ☒ Yes

Scenario Name:

Description:

Scheduled:

No ☐ Yes

Scenario Instructions 

When an event is saved or tasks page is triggered, 25Live checks the criteria below. A criteria matches if at least one of its "Include Any", and none of its "Include None" values match. If all criteria match, then email(s) and/or To Do task(s) will generate based on the selected templates. Be sure to preview your scenario before saving.

Create To Do:

No ☐ Yes

Trigger Actions On:

☒ Event Creation ☐ Event Edit ☐ Both

Trigger Template Actions When Saving From:

☒ Event Form

☒ Event State Dropdown

☒ Express Scheduling

☐ Tasks Page

☐ Cancel Request

Image: Scenarios can be scheduled to be sent later or marked inactive to save indefinitely.

Enter a name into the **Scenario Name** field. If copying from an existing scenario, remove the name that was automatically added and enter a new, unique scenario name.

Set the **Active** toggle to **Yes**. An active scenario will trigger an email if it matches the actions and criteria for an event. You may also set the trigger to **No** if you are drafting it for later use.

Update the **Scheduled** toggle to **Yes** to send the email a set number of days from the event's start or end date. Update the **Schedule Type** dropdown to **Days From Event Start** or **Days From Event End**. Next, enter a positive number in the **Schedule Offset Days** to send the email after the start/end date or a negative number to schedule before the start/end date. Scheduled emails go out at 3:00 a.m. (Pacific time, 6:00 a.m. Eastern time) on their scheduled day.

Scheduled:

No ☒ Yes

Schedule Type:

Schedule Offset Days:

Image: Select a Schedule Type and enter a number into the Schedule Offset Days field.

Scheduled Emails: Expected Functionality

If the Scheduled toggle is set to On, the emails on the scenario will not send immediately, but will instead

get scheduled one of two ways:

- N days from the event start (useful as a reminder, or for set up)
- N days from the event end (useful for cleanup)

What if the same scenario is triggered multiple times? Will it schedule the same emails to get sent over and over?

No, the scheduled email system recognizes the same scenario and template on an event and will not schedule new emails. It will, however, update the scenario and template content (values pulled in with [template variables](#), etc.) and send date if it has changed.

User Action	Scenario Check	Template Update
Update Template	✗	✗
Event State Dropdown	Apply Email Schedule (No Removal)	✓
Event Form Field Update	Apply Email Schedule (No Removal)	✓
Event Delete	✗	✗
Task Action	Apply Email Schedule (No Removal)	✓
Event Form Save (No Field Updates)	✗	✗

Use the **Create To Do** toggle to choose whether you want a "to do" task to automatically trigger when this email sends.



Warning: Check Your Event Form Configuration Settings

To Do tasks will not be automatically generated for any events where a user has chosen to Silent Save the event. This can happen if you have toggled **Allow Silent Save** to **Yes** in the [event form configurations](#).

See [Creating, Copying, and Editing To Do Templates](#) to learn how to create a template for the automatically created to do task.

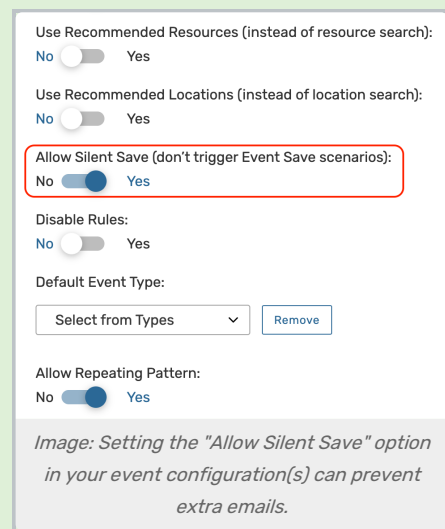
Choose when you want to trigger the sending email(s) with the **Trigger Actions On** choices. Choose from:

- Event Creation
- Event Edit (*includes inline editing of [Event State](#) from [Event Details](#)*)
- Both



Tip: Allowing Silent Save in Event Configurations to Reduce Emails

If you set your scenario to **Trigger Actions On "Event Edit,"** consider using the **Allow Silent Save** option in **Event Configurations** in order to prevent event save emails from going out unnecessarily. Please note that this will also prevent **To Dos** from being created by an Event Save Email scenario.



The screenshot shows a configuration window with several toggle switches and a dropdown menu. The 'Allow Silent Save (don't trigger Event Save scenarios):' option is highlighted with a red rectangular box. Below the configuration options, there is a grey box containing an image caption.

Use Recommended Resources (instead of resource search):
No ☐ Yes

Use Recommended Locations (instead of location search):
No ☐ Yes

Allow Silent Save (don't trigger Event Save scenarios):
No ☒ Yes

Disable Rules:
No ☐ Yes

Default Event Type:
Select from Types

Allow Repeating Pattern:
No ☒ Yes

Image: Setting the "Allow Silent Save" option in your event configuration(s) can prevent extra emails.

Last, you can choose how to **Send Email From** with options to have the email trigger from actions in the:

- [Event Form](#) (saving an event)
- Event State Dropdown (when edited from the [Event Details view](#))
 - *Note: When editing, this choice corresponds to the Event State saved after edit.*
- [Express Scheduling](#)
- [Tasks Page](#)
- [Cancel Request](#) - (if a user without the ability to edit the event state requests cancellation from the [Event Details](#))

4. Complete or Edit Criteria and Pre Criteria Fields

Use the dropdown menus under **Criteria** and **Pre Criteria** to complete the parameters listed for each. Most criteria allows you to **Include Any** of your chosen criteria and/or **Include None** of the chosen criteria.

Criteria

Event States (0)

Include Any

Select States

Include None

Select States

Event Types (0)

Locations (0)

Resources (0)

Primary Organizations (0)

Requirements (0)

Security Groups (0)

Custom Attributes (0)

Expected Headcount

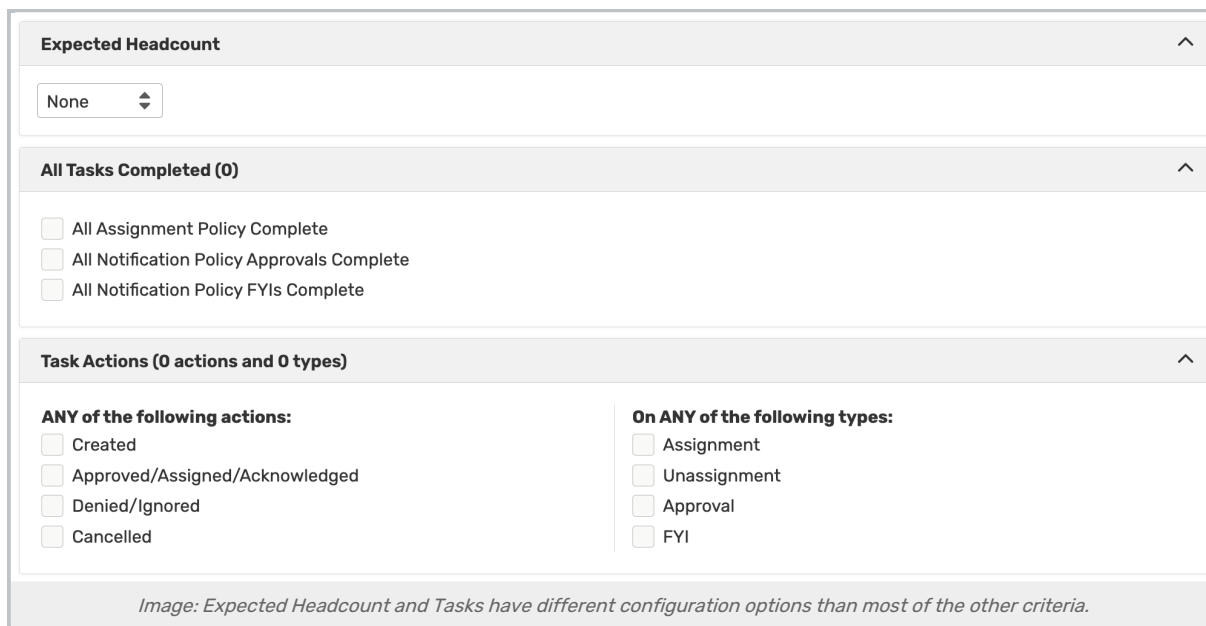
All Tasks Completed (0)

Task Actions (0 actions and 0 types)

Image: When adding trigger criteria, most allow you to choose whether to **Include Any** of the selected criteria or **Include None** of the selected criteria.

This differs for Expected Headcount, All Tasks Completed, and Task Actions:

- **Expected Headcount** requires you to choose one of several options including an expected headcount between X and Y, equal to X, etc.
- **All Task Actions** lets you specify whether the scenario should be applied when all assignment policy, notification and approvals, and/or notification policy FYIs are complete.
- **Task Actions** lets you specify which task actions (Created, Approved/Assigned/Acknowledged, Denied/Ignored, or Cancelled) or task types (Assignment, Unassignment, Approval, or FYI) should trigger the scenario.



Expected Headcount ^

None ▾

All Tasks Completed (0) ^

☐ All Assignment Policy Complete

☐ All Notification Policy Approvals Complete

☐ All Notification Policy FYIs Complete

Task Actions (0 actions and 0 types) ^

ANY of the following actions:

☐ Created

☐ Approved/Assigned/Acknowledged

☐ Denied/Ignored

☐ Cancelled

On ANY of the following types:

☐ Assignment

☐ Unassignment

☐ Approval

☐ FYI


Image: Expected Headcount and Tasks have different configuration options than most of the other criteria.

Most criteria use the standard 25Live search bars and checkboxes. Select the "X" icons to the right when you wish to remove criteria.

- **Criteria** - *Correspond to the values saved after creation or edit:*
 - Event States *(includes inline editing from [Event Details](#))*
 - Event Types
 - Locations *(the event was requested for)*
 - Resources *(the event was requested with)*
 - Primary Organizations
 - Requirements
 - Security Groups *(of the user that will be taking the action when the email is triggered)*
 - Custom Attributes
 - Expected Headcount
 - Choose from None, Between, less than or equal to X, less than X, equal to X, more than or equal to X
 - Tasks
- **Pre Criteria** - *Correspond to the values in place before editing:*
 - Event States *(includes inline editing from [Event Details](#))*
 - Event Types
 - Locations *(the event was requested for)*
 - Resources *(the event was requested with)*
 - Primary Organizations
 - Requirements
 - Custom Attributes
 - Expected Headcount

Pre Criteria will trigger a scenario for variables that were in place before any changes were saved to it. They will never trigger upon event creation.

For example, you may want to choose an Event State Pre Criteria variable to receive an email when an event moves from the Confirmed state to the Cancelled state, but not if the event is edited once it's cancelled.



The image shows a configuration interface titled "Pre Criteria". It contains a list of eight criteria, each with a dropdown arrow on the right:

- Event States (0)
- Event Types (0)
- Locations (0)
- Resources (0)
- Primary Organizations (0)
- Requirements (0)
- Custom Attributes (0)
- Expected Headcount

Below the list, there is a caption: *Image: Pre Criteria configuration options.*

When Will the Scenario Trigger an Email?

If no top-level field (Event State, Event Type, Location, Resource, etc.) is selected, that field will not limit the rules and will match for **ANY** value. A single criterion for a field will also match.

If multiple criteria are selected within a field (such as specific locations within the Locations field), then **AT LEAST ONE** of the choices need to be met for the email to trigger.

Example Criteria and How They Will Process

Example 1: No Event Type, One Location, Multiple Resources

Locations (1)

Include Location Preferences: No ☒ Yes

Include Any

Select Locations

✕ ARTS 101

Include None

Select Locations

Resources (2)

Include Resource Preferences: No ☐ Yes

Include Any

Select Resources

✕ AV - Data Projector

✕ AV - Screen - 10'

Include None

Select Resources

Image: In this example, the email(s) will trigger no matter which Event Type, only for the specified location, and for any of the two resources.

Example 2: Multiple Security Groups, No Other Criteria

Security Groups (4)

Include Any

Select Security Groups

✕ Approver - East Campus

✕ Approver - North Campus

✕ Approver - South Campus

✕ Approver - West Campus

Include None

Select Security Groups

Image: In this example, the email(s) will trigger for any Primary Organization (because none were specified).

Example 3: Multiple Selections in All Types of Fields

Criteria

Event States (1)

Include Any

Select States

✕ Confirmed

Include None

Select States

Event Types (2)

Include Any

Select Types

✕ Study Session ✕ Tutoring

Include None

Select Types

Locations (48)

Include Location Preferences: No ☒ Yes

Include Any

Select Locations

Include None

Select Locations

Image: In this example, the email(s) will trigger for Confirmed and Tentative Event States that are Tutoring or Study Session Event Types in the Student Center (MSC).

Example 4: Email Send Based On Location Approval in Tasks

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Trigger Actions On:

☐ Event Creation
 ☐ Event Edit
 ☒ Both

Trigger Template Actions When Saving From:

☒ Event Form
☐ Event State Dropdown
☐ Express Scheduling
☒ Tasks Page
☐ Cancel Request

Criteria

Event States (2) ^

Include Any

Select States

☒ Confirmed
 ☒ Tentative

Include None

Select States

Image: When this task is completed to approve the location, an email scenario will be triggered.

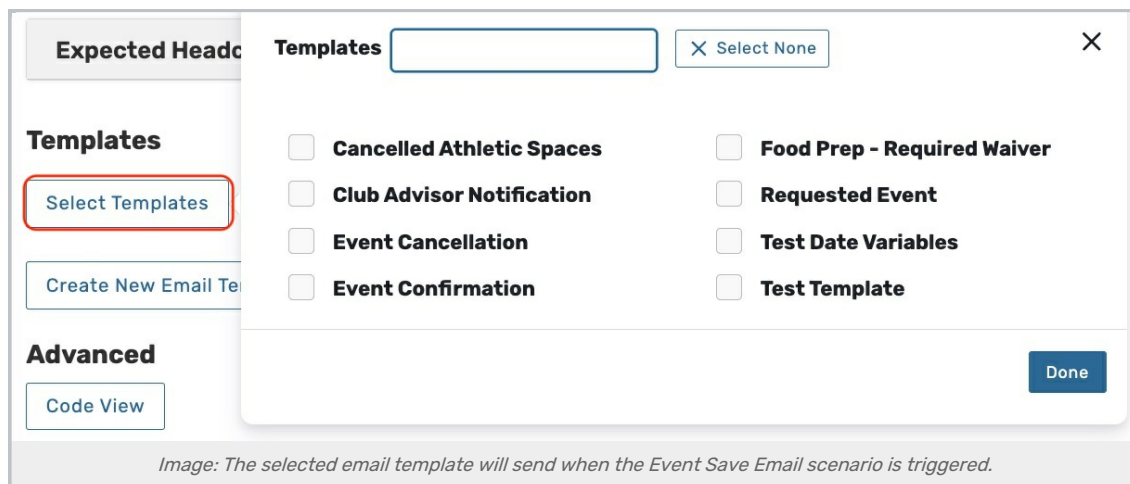


Note: Event Preferences Can Be Included

When adding Locations and Resources to be a part of the criteria for a scenario, each section also has a No/Yes toggle available to **Include Location Preferences** and/or to **Include Resource Preferences**. These are the event preferences defined in an event's details view in the "Occurrences" section as preferred. See [Viewing Event Details](#).

5. Add Email Template(s)

If you already have email templates created in your library, use the **Select Templates** button to check which template(s) you want to send using the criteria in this scenario. When a scenario is triggered with matching rules, 25Live will send all emails specified in the Templates section. Specific templates may be restricted by security group in the [Series25 Group Administration tool](#).



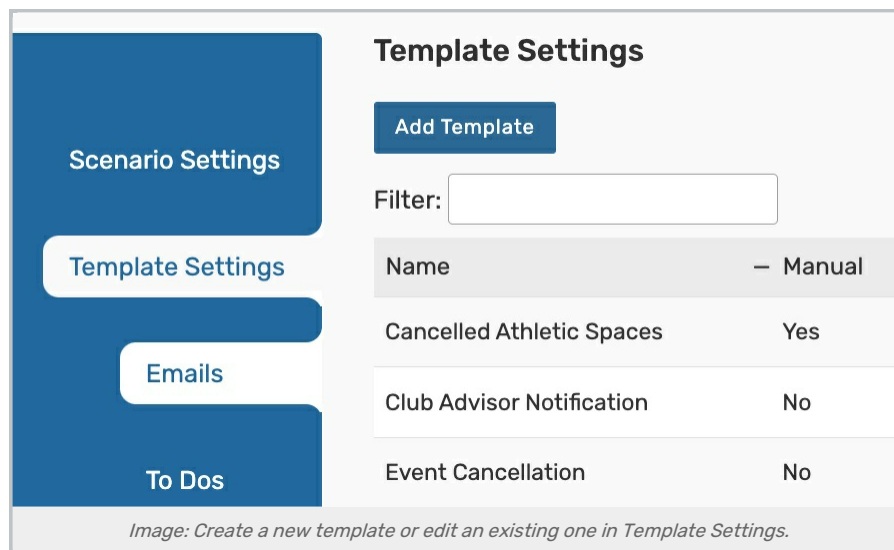
Tip: A Scenario Can Trigger Multiple Emails

If you wish to send more than one email using the rules in your scenario, you have that option. For example, you could send one email template to the event requestor and a different template to the event scheduler.

If you don't have any email templates in your library, use the **Create New Template** button.

[Read Details About Creating and Editing Templates](#)

If you need to edit an existing email template, go back to **System Settings > Event Save Email > Template Settings**.



✕

Edit Template: Event Cancellation

Template Name:

Event Cancellation

Manual Template:

No

Yes

Template Instructions

You may use the recipient shortcuts below to target certain users:

- 'object owner' - send to the object owner's work email address
- 'service providers' - send to the work email address of the contacts that have approval workflow in this event
- 'assigners' - send to the work email address of the contacts that have assignment workflow in this event
- Event role name - use the work email address associated with the contact in this role (eg, 'scheduler', 'requestor', 'emergency contact')
- 'attendees' - send to the work email address of all registrants

Custom "From" Address:

No

Yes

To

{{ \$pro.vars.roleContactFirst.-

CC

BCC

Reports

Confirmation

Invoice

Select Reports

iCal File

No

Yes

Subject


{{ \$pro.vars.dates.startDate |

Body

FileInsertTableViewFormatTools


↶↷

B*I*U

A ▼ ▼

☰☷

System Font ▼12pt ▼



Hello {{ \$pro.vars.roleContactFirst.-1}},

Image: Example of an email template form.

6. Add or Create a To Do Template

If you toggled the **Create To Do** setting to Yes above, then the **To Do Templates** section will display. Use the **Select To Do Templates** to add one or more tasks you'd like to have automatically generate when the event email sends.

If you need a new and/or different to do task to generate, use the **Create New To Do Template** button.

See [Creating, Copying, and Editing To Do Templates](#) for more information.



Note: For Experts, Advanced Editing Is Also Available With Code View

If you have **Advanced** skills and wish to work in JavaScript using the Code View:

- The **Code View** button will take any form input and convert it to JavaScript, without overwriting any customized code already entered in code view.
- If you wish to go back, a **Form View** button will be available. This will generate a message indicating

that changes that weren't saved while in Code View will be reverted.

Code View is available for technical experts who know how to write code. Troubleshooting these customizations in this advanced mode is beyond the scope of our technical support.

7. Preview Your Scenario and Template(s) (Optional)



Note: Previews Need Appropriate Actions

Because you will use an existing (not new) event in the preview, it will only trigger for scenarios with the **Trigger Actions On** action set to **Event Edit** or **Both**.

25Live gives you the opportunity to preview your scenario using an internal Event Reference ID, which is in the format of:

Four-digit year, dash, six uppercase letters:

2024 - AAGXQN

Preview by Reference

When you preview from within a scenario, 25Live will first check if the event meets the criteria and then display any email(s) with the content that would be sent. (Note that pre-save variables will not be displayed in preview; only saved data will be represented by variables.)

Preview Scenario

×

The following email would have been sent

Template: Event Confirmation

↑

To: jane.smith@myschool.edu

From:

CC: service providers

BCC:

Reports: confirmation

Subject: Your event has been confirmed (2023-AAGXQN)

Body:

Your event has been confirmed.

Organization Name: FACULTY SENATE

Event Time: 11/14/23, 12:00 PM - 11/14/23, 1:30 PM

Full Reservation Time: 11/14/23, 12:00 PM - 11/14/23, 1:30 PM

Please note: No Food or Beverages are allowed in the classrooms, auditoriums or labs.

Your organization agrees to be responsible for all property used and accept responsibility for any damages or loss incurred as the result of its use.

All liability for damages to the equipment, furniture or technology in the facility is the responsibility of the department, school/college or unit reserving the facility.

Image: Example of an Event Save Email scenario preview.



Tip: How to Find an Event Reference

- Search for or go to a favorited event. (See topics on [Searching](#) and [Favorites](#))
- Go to the event details. (See [Viewing Event Details](#))
- Scroll to the **Event Info** section in the right-hand column.

The screenshot displays the 'Study Abroad Fair' event details. At the top, there's a header with the event name, status (Confirmed), reference ID (2024-AAHNNR), date (Tue Apr 09 2024 1:00 pm - 4:00 pm), location (BCC 300), and assigned technician (AV - Technician [1]). Below this is a navigation bar with tabs: Details, Occurrences, Calendar, Schedule, Task List, Pricing, Audit Trail, and Scheduled Emails. The 'Details' tab is active. On the left, there's a 'General' section with fields for Event Name, Event Title, Event Type (Fair), Organization (STUDENT AFFAIRS), Requestor (Garcia, Eric), and Scheduler (Smith, Jane). On the right, there's an 'Event Info' section showing Requirements, Event Owner (Garcia, Eric), Creation Date (Mon Mar 18 2024), and Reference (2024-AAHNNR). A caption at the bottom reads: 'Image: You can find an event reference ID in the Event Details view.'

8. Save the Scenario

Use the **Save** button to save your completed Event Save Email Scenario.

From here, you can also delete the scenario if necessary or cancel, *which will remove all choices*.



Warning: Saving a Blank Scenario

If you save a blank scenario (one with no triggering actions or criteria), it will fire upon *every* event save and edit. While you could use this as a feature to send a standard success message, please ensure you don't save a blank scenario accidentally without a planned expectation.

Editing or Deleting a Scenario

You can access your library of Event Save Email scenarios in **System Settings > Event Save Email > Scenario Settings**. All previously created scenarios are displayed in alphabetical order. Choose a scenario from the table and select the associated **Edit** button. Then, follow the same steps as used in **How to Create a Scenario** section above.

From here, you can also delete the scenario using the **Delete** button.

Scenario Settings

Add Scenario

Preview reference: YYY-ABCDEF

Filter:

Scenario	Description	Active	Templates	To Do Templates	Preview	Copy	Edit	Delete
Athletic Event Cancellation		Yes	Cancelled Athletic Spaces		Preview	Copy	Edit	Delete
Club Advisor Notification		No	Club Advisor Notification		Preview	Copy	Edit	Delete
Confirmed		Yes	Event Confirmation		Preview	Copy	Edit	Delete
Event Cancellation		No	Event Cancellation		Preview	Copy	Edit	Delete

Image: Scenario Edit and Delete buttons.