

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](#): **Admin: 17.0 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:

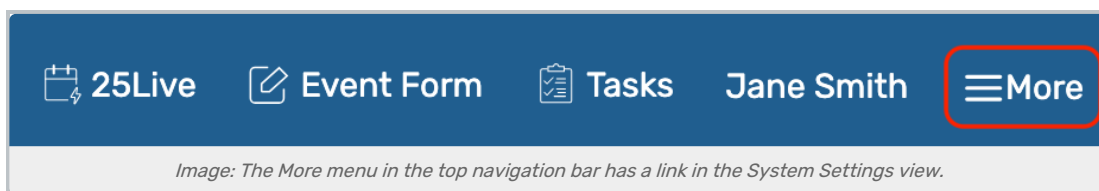
- A member of the Requestor - Faculty and Staff **Edits** an event
- With **Event Type** Meeting
- And the **Event State** is Confirmed

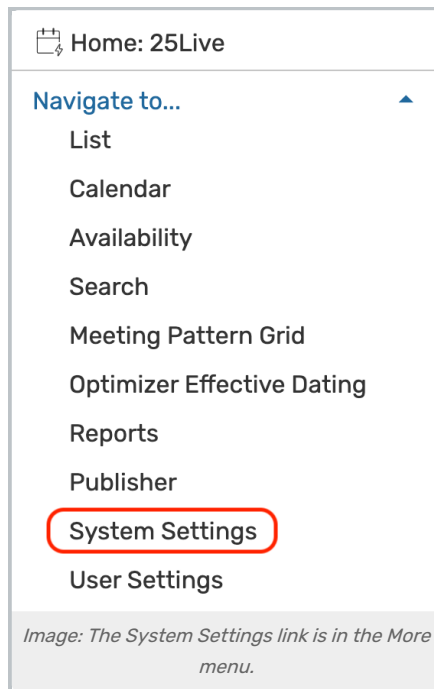
Then:

- **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

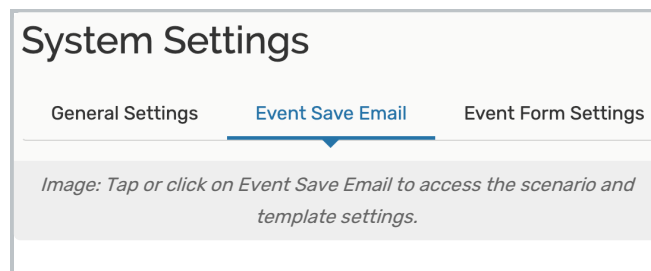
How to Create a Scenario

1. Go to the **System Settings** view through the 25Live **More** menu.





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



2. Select **Scenario Settings** from the left-hand menu of the **Event Save Email** section.
3. Copy an existing scenario or create a new one

Scenario Settings

Add Scenario

Preview reference:

YYYY-ABCDEF

Filter:

Scenario	Active	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
Food Prep	No	• Food Prep - Required Waiver	Preview	Copy	Edit	Delete
Request Email	No	• Requested Event	Preview	Copy	Edit	Delete
Test Scenerio	No	• Test Template	Preview	Copy	Edit	Delete

Image: Click **Copy** in the row of the scenario you want to copy.

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.

4. Name the scenario, activate it, and choose triggering actions

Create Scenario

Scenario Name:

Active:

No

Yes

Scenario Instructions

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When an event is saved or tasks page is triggered, 25Live checks the criteria below. If all 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 marked active or inactive to save for later and can trigger upon creation, editing, or both.

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.

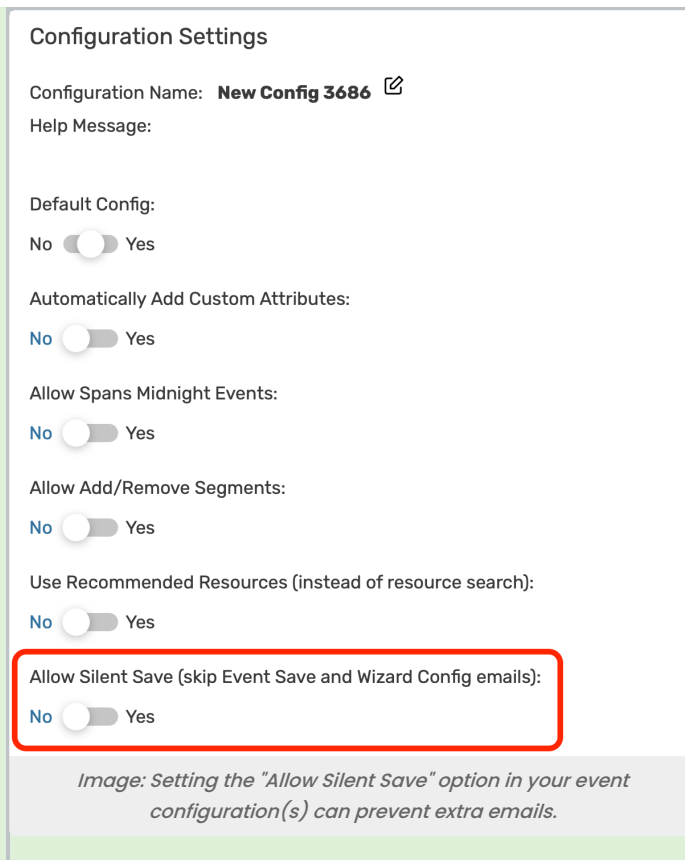
Use the **Create To Do** toggle to choose whether you want a "to do" task to automatically trigger when this email sends. See [Creating, Copying, and Editing To Do Templates](#) to learn how to create a template for the automatically created to do task.

Next, 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



The screenshot shows a 'Configuration Settings' window. It includes fields for 'Configuration Name' (set to 'New Config 3686') and 'Help Message'. Below these are several toggle switches for various settings: 'Default Config', 'Automatically Add Custom Attributes', 'Allow Spans Midnight Events', 'Allow Add/Remove Segments', 'Use Recommended Resources (instead of resource search)', and 'Allow Silent Save (skip Event Save and Wizard Config emails)'. The 'Allow Silent Save' toggle is highlighted with a red rectangular box. At the bottom of the settings window, there is a grey box containing the text: 'Image: Setting the "Allow Silent Save" option in your event configuration(s) can prevent extra emails.'

If you set your scenario to **Trigger Actions On "Event Edit,"** then you should consider using the "Allow Silent Save" option in [Event Configurations](#) in order to prevent too many emails from going out unnecessarily.

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](#))

5. Complete or edit criteria and pre criteria fields

Use the dropdown menus under **Criteria** and **Pre Criteria** to complete the parameters listed for each. You can **Include Any** of your chosen criteria and/or **Include None** of the chosen criteria for all categories except **Tasks**. Most criteria use the standard 25Live search bars and checkboxes. Select the "X" icons to the right when you wish to remove criteria.

Criteria

Event States (0)
^

Include Any

Select States

Include None

Select States

Event Types (0)
v

Locations (0)
v

Resources (0)
v

Primary Organizations (0)
v

Requirements (0)
v

Security Groups (0)
v

Custom Attributes (0)
v

Tasks (0)
v

*Image: When adding trigger criteria, you can choose whether to **Include Any** of the selected criteria or **Include None** of the selected 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
 - 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

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 screenshot of the 'Pre Criteria' options menu. It is a vertical list of eight dropdown menus, each with a label and a count in parentheses, followed by a downward arrow. The labels are: 'Event States (0)', 'Event Types (0)', 'Locations (0)', 'Resources (0)', 'Primary Organizations (0)', 'Requirements (0)', and 'Custom Attributes (0)'. Below the list, there is a caption: 'Image: Pre Criteria 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

X ARTS 101

Include None

Select Locations

Resources (2)

Include Resource Preferences: No ☐ Yes

Include Any

Select Resources

X AV - Data Projector

X 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

X Approver - East Campus

X Approver - North Campus

X Approver - South Campus

X 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

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.

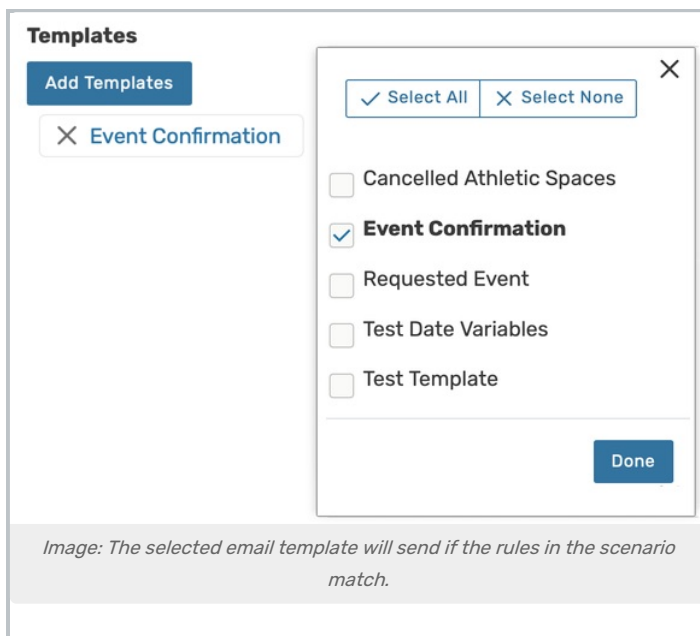


Note: Event Preferences Can Be Included

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](#).

6. 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](#).



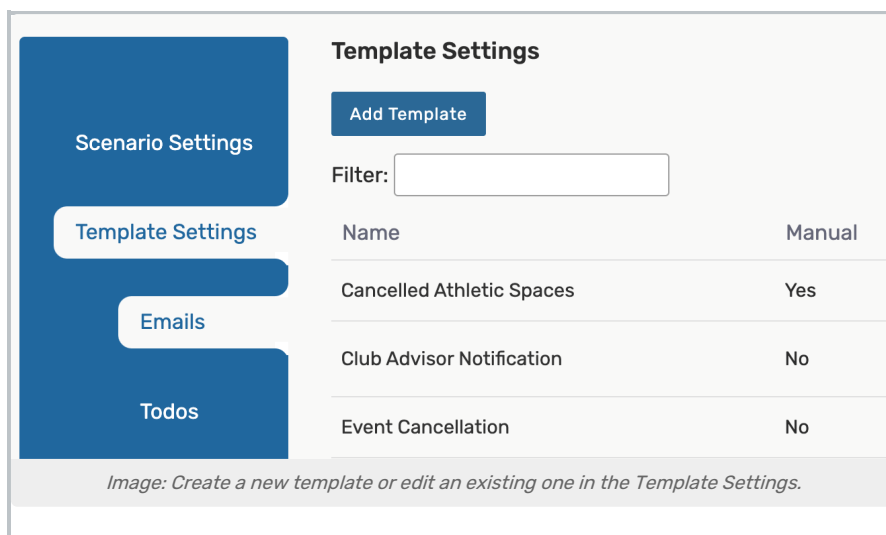
Tip: A Scenario Can Trigger Multiple Emails

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 Font12pt

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

Image: Example of an email template form.

7. 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.

8. 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**.

Preview by Reference

Preview

Save

Cancel

Image: The Preview option requires an event reference ID.

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

<i>Four-digit year</i>	<i>Dash</i>	<i>Six uppercase letters</i>
2024	-	AAGXQN

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.

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.

New Faculty Welcome Lunch

Confirmed

202X-AAGXQN

Mon Nov 14 202X 12:00 pm - 1:30 pm

83F 100

Details

Occurrences

Calendar

Schedule

Task List

Pricing

Audit Trail

Edit Mode

Off

On

Event Reference Number Used to Preview

General

Event Name: New Faculty Welcome Lunch

Event Title:

Event Type: Meeting

Organization: FACULTY SENATE

Requestor: Smith, Jane

Scheduler: Smith, Jane

Head Count: expected 0

registered 0

Description:

Comments:

Internal Notes:

Confirmation Text:

Event Categories

Faculty/Staff Events

Open to the Public

Custom Attributes

Add a Custom Attribute

Event Info

Requirements:

Send to Campus Calendar:

Send to Faculty Events Calendar:

Event Owner: Smith, Jane

Creation Date: Fri Nov 04 202X

Reference: 202X-AAGXQN

Image: You can find an event reference ID in the Event Details View.

9. Save the scenario

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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.
