Adding and Editing Org Ratings In 25Live

25Live allows you to define a list of organization ratings in the Master Definitions section of the System Settings area.

- Define as many ratings as you need, but try to keep them high-level a maximum of six is recommended.
- Create ratings that assist schedulers in accurately assessing an organization's performance.

How To Access Master Definitions



Security Note

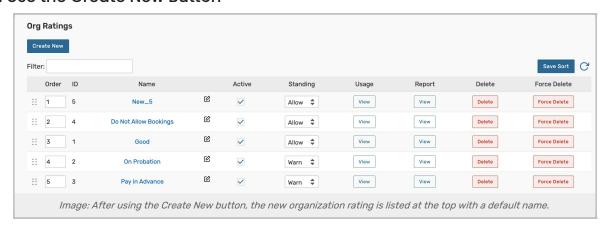
To access Master Definitions System Settings views, your 25Live user must have security permissions set in Series25 Group Administration for each of the types that you wish to access, including:

- Events: Administrative: 6.0 Manage Event Master Definitions
- Event Requirement Notification Policy: Administrative: 7.0 Set Event Notification Policy
- Event Types: Administrative: 5.2 Manage Event Type Hierarchy
- Locations: Administrative: 10.2 Manage Location Master Definitions
- Resources: Administrative: 12.2 Manage Resource Master Definitions
- Organizations: Administrative: 15.4 Manage Organization Master Definitions
- Organization Ratings: Administrative: 15.6 Edit Organization Ratings
- Organization Partition Preferences: Administrative: 15.8 Edit Organization Location Preferences
- Contacts: Administrative: 14.1 Manage Contact Master Definitions

If you would like any of the described settings changed for your user, contact your 25Live administrator.

How To Add Org Ratings

1. Use the Create New Button



To add a new organization rating, use the Create New button. Your new item will appear at the top of the list.

2. Rename the New Item

The new org rating will have a default name that includes its ID number. Use the edit icon (②) to rename.

Editing Organization Ratings

You can edit the list or item with the following actions:

- Manually reorder items
- The Id number for each item is listed
- Edit the Name of the item
- Check or uncheck the Active status
- The **Standing** dropdown selection is used to designate which ratings make an organization ineligible to sponsor an event (The standings defined for organizations describe their performance as an organization/customer)
 - o "Allow" the organization can be assigned to events
 - o "Warn" the organization can be assigned to events, but there will be a warning in the event form
 - o "Deny" the event form will prevent users from submitting events with this organization
 - Note: Currently, this does not prevent submission if a user does not have permission to see the organization's rating.
- View the Usage of the item in events, searches, etc.
- Delete the item (if it is not being used)
- Force Delete the item (even if it's being used) and remove all references (available only to Administrators in the (-1) security group)



Use Caution With Force Delete

The option to "force delete" a master definition item should be taken with care. Be advised that some searches may no longer function as expected until you edit them to remove references.



Tip: Manually Sorting Item Display Order

