Adding and Editing Custom Attributes In 25Live

25Live allows you to add and edit custom attributes in the <u>Master Definitions</u> section of the <u>System Settings</u> area. Custom attributes allow you an unlimited ability to track additional data elements about events, locations, resources, organizations, and contacts.

How To Access Master Definitions



Security Note

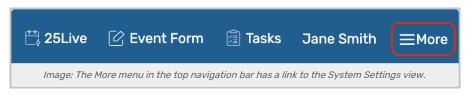
To access Master Definitions System Settings views, your 25Live user must have security permissions set in Series25 Group Administration for each of the types that you wish to access, including:

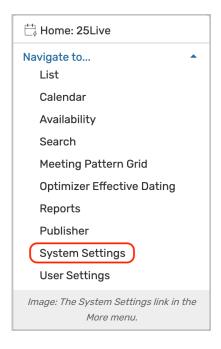
- Events: Admin: 6.0 Manage Event Master Lists
- Event Requirement Notification Policy: Admin: 7.0 Set Event Notification Policy
- Event Types: Admin: 5.2 Manage Event Type Hierarchy
- Locations: Admin: 10.2 Manage Location Master Lists
- Resources: Admin: 11.2 Manage Resource Master Lists
- Organizations: Admin: 13.4 Manage Organization Master Lists
- Organization Ratings: Admin: 13.6 Edit Organization Ratings
- Organization Partition Preferences: Admin: 13.8 Edit Organization Location Preferences
- Contacts: Admin: 12.1 Create and View all active and inactive Contact Master Lists

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

1. Go to the System Settings View

The System Settings section is accessible from the More menu in the top navigation bar.





2. Tap or Click the Master Definitions Link

Use the menu link to go to the System Settings view, then view the Master Definitions section.



See <u>Working With Master Definitions</u> for details on general navigation within the Master Definitions section and actions available to all types.



System-Supplied Master Definition Items

In addition to the Master Definition items you create, 25Live includes a number of system-supplied event master definition items marked "[SYSTEM]" and grayed out. These items can't be edited or deleted, but can be deactivated.

See Using System-Supplied Event Master Definition Items.

For Locations, the following are included:

- Location Categories Ways you want to group locations for reporting and searching purposes
- Location Features Physical attributes of locations
- Location Layouts Physical arrangements locations may have
- · Location Partitions Mutually exclusive location groupings used in Schedule 25 Optimizer processing

Note: In addition to the location custom attributes you create, 25Live includes a number of system-supplied location custom attributes. These items can't be edited or deleted, but can be deactivated.

How To Add Custom Attributes

1. Open a Specific Custom Attributes View



The Custom Attributes view within the Master Definitions section has submenus organized by object type:

Event

- Create custom attributes that allow users to provide additional needed event information
- Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, Entrance Fee (\$) or High Risk Activity?
- Select the appropriate data type (see below)

Location

- o Create custom attributes that allow users to provide additional needed location information
- Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, Room Deposit (\$)
- Select the appropriate data type (see below)

Resource

- · Create custom attributes that allow users to provide additional needed resource information
- 🛮 If you want to associate images with resources, see Inline Editing Resource Details
- Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, "Deposit for Use (\$)"
- Select the appropriate data type (see below)

Organization

o Create custom attributes that allow users to provide additional needed organization information

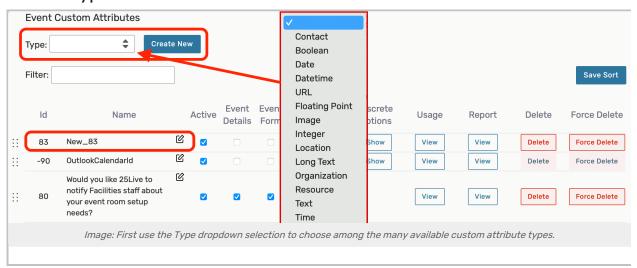
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- o Give a visual hint to indicate the type of data required; for example, Web Site (URL)
- o Select the appropriate data type (see below)

Contact

- o Create custom attributes that allow users to provide additional needed contact information
- Give a visual hint, such as a dollar sign or question mark, in the attribute label to indicate the type of data required; for example, "First Aid/CPR Certified?"
- Select the appropriate data type (see below)

2. Select a Type



Before using the button to create a new custom attribute, you must select a **Type** using the dropdown menu.

Attribute Type	Input Type
Boolean	Yes/No condition
Contact	A valid 25Live contact name
Date	Date only
Date Time	Date and time
Floating Point	A number which may have a decimal
Image	Path name to an image file
Integer	A whole number
Location	A valid 25Live location name
Long Text	Long text or other alphanumeric characters
Organization	A valid 25Live organization name

Attribute Type	Input Type
Resource	A valid 25Live resource name
Text	Text and/or other alphanumeric characters (maximum 80 characters)
Time	Time only
URL	A URL

3. Use the Create New Button

To add a new custom attribute, use the **Create New** button to add a new custom attribute. Your new attribute will appear at the top of the list.

4. Rename the New Custom Attribute

Editing Custom Attributes

Editing Actions for all Attribute Types

Every type of custom attribute allows you to edit the list or item with the following actions:

- Manually reorder items
 - Note: If you previously depended on the application to automatically sort required custom attributes to the top of the section, you must now manually set the order.
- The Id number for each item is listed
- Edit the Name of the item
- Check or uncheck the Active status
- . The Abridged checkbox controls if the item is only visible on an abridged list for users with limited permissions
- The Type column shows you if the attribute is a string, date, image, file reference, etc.
- View the Usage of the item in events, searches, etc.
- Use the Report column to run the "Master Definition Usage Excel" report to export usage information
- . Deletethe item (if it is not being used)
 - Note: If you delete or force delete a custom attribute without first checking if it's being used in other features (such as event form rules or event save email scenarios), you may cause errors, blank spaces in forms, etc. Please check carefully before deleting.
- 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

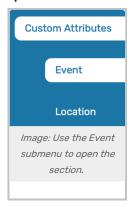


The default display order for master definition items is to show them in alphabetical order. You can set the order that items will display by clicking on the row and dragging up or down. Use the **Save Sort** button to save the order.

Discrete Options for Event Custom Attributes

Text type event custom attributes have a special ability to add **Discrete Options**.

1. Open the Event Submenu Under Custom Attributes



Go to the **Custom Attributes** > **Event** section.

2. Use the Show Button to Reveal Options

Any custom attribute that is of the type to allow discrete options will have a **Show** button next to it. Use the button to reveal the option actions.

3. Name and Arrange Options

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Type a name for each option. Use the **Add** button again to add more. You can change the order of the options using the **Move Up** and **Move Down** buttons.

4. Save Your Changes

Use the Save button to save and return to the Events Custom Attributes list.



Reminder: Custom Attributes Need to Be Mapped

To show custom attributes when users are creating events, they must be associated with either:

- An Event Type in System Settings
- Logic within Event Form Rules