

Adding and Editing Event Types

25Live allows you to define a list of event types in the [Master Definitions](#) section of the [System Settings](#) area that you can then choose when [creating an event using the Event Form](#). Permissions determine which Event Types you can choose from. Your chosen Event Type determines some options that appear later in the form. When users create or edit an event of a particular type using the Event form, the categories, custom attributes, contact roles, and requirements you've selected for that event type (and that are available based on the user's security group rights) are available for selection.

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:

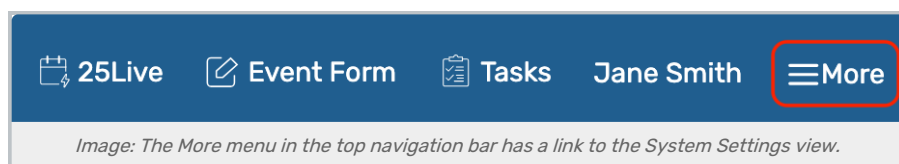
- Events: Administrative: 6.0 *Manage Event Master Definitions*
- Event Requirement Notification Policy: Administrative: 7.0 *Set Event Notification Policy*
- Event Types: Administrative: 5.2 *Manage Event Type Hierarchy*
- Locations: Administrative: 10.2 *Manage Location Master Definitions*
- Resources: 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*

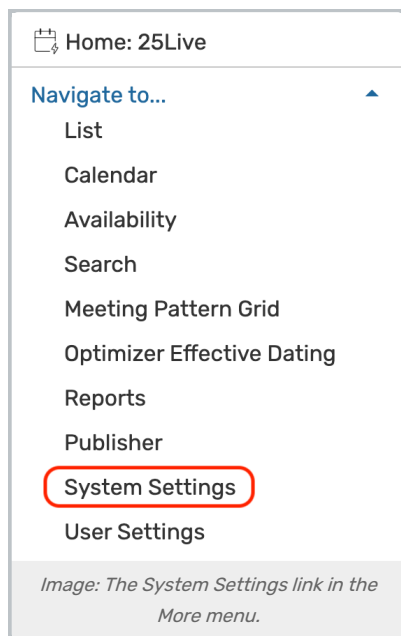
If you would like any of the described settings changed for your user, contact your 25Live administrator.

Some features and functions are only available to members of the Administrator - System (-1) security group.

1. Go to the System Settings View

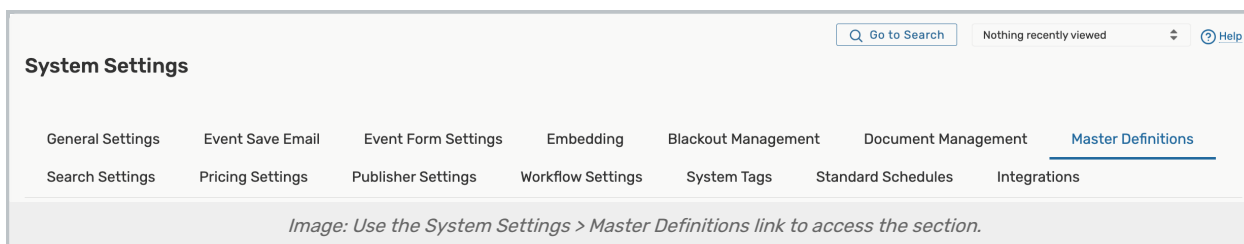
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).





2. Tap or Click the Master Definitions Link

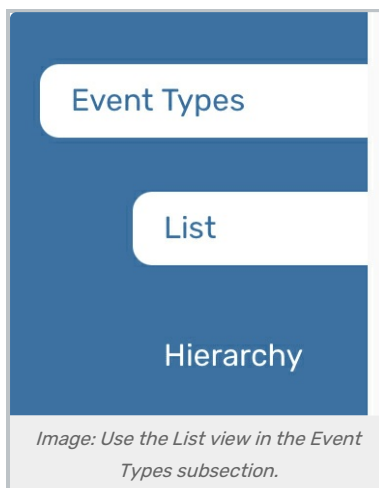
Use the menu link to go to the **System Settings** view, then open the **Master Definitions** section.



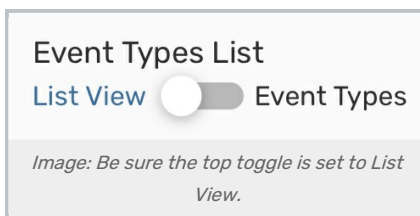
See [Working With Master Definitions](#) for details on general navigation within the Master Definitions section and actions available to all types.

Adding Event Types

1. Go to the List View in the Event Types Subsection



The Event Types subsection has two main views, List and Hierarchy. The **List** view is the best place to view all current event types and create new ones.



Be sure the **Event Types List** toggle at the top of the view is set to **List View** to create a new Event Type.

2. Complete Top Event Type Information

Event Type Hierarchy

New Event Type

Cabinet - Required **Folder - Required**

Select a Cabinet Select an item

Event Type Name - Required **VCal Processing**

type_84 Unlocked Transactional

Image: The first four basic fields to complete for a new event type.

Use the **Create New** button at the top of the list. The first four fields to complete are:

- **Cabinet** *(required)*: You're choosing which cabinet you'd like your new event type to be associated with
- **Folder**: Similarly to the Cabinet choice, you need to associate your new event type with a folder
 - *Reminder: Having [fewer cabinets and folders](#) can simplify creating new event types as well as simplify the routing of events.*
 - *Tip: Event Types can be created directly within a Cabinet without a folder, but it's not recommended.*
- **Event Type Name** *(required)* This is the name users will search for and choose when using the Event Form or editing events. Using simple names that are meaningful for your institution is recommended. Using a unique

name is required.

- **VCal Processing:** There are three options for vCalendar processing settings. This setting determines how events will behave when they are imported through [LYNX](#) or the CSV Event [Import tool](#).
 - *Unlocked Transactional:* This is the best setting to use for all event types since it retains a persistent connection with the original event source outside 25Live
 - Events retain an "Alien UID" (unique identifier) which allows an outside application to recognize the event. If a later import includes an event with the same Alien UID, then it will update this event rather than creating a new one
 - *Naturalize:* Events with this setting will not retain an Alien UID, preventing outside applications from finding them. Importing the "same" event again (with the same Alien UID) will cause 25Live to create a duplicate rather than updating the first one
 - This setting should only be chosen if you have no intent to ever update an event after importing it or send details back to another system
 - *Locked Transactional:* This setting has been deprecated and no longer has a distinct effect from Unlocked Transactional, but it is shown in case an older instance has the setting

3. Choose Report Options

Reports
 Confirmation Notice
 Event Confirmation (Detailed) ▼

Invoice
 Event Invoice (Related) ▼

Select Reports

✕ Event Organization Shell

✕ Event Confirmation (Related)

✕ Event Confirmation (Academic)

✕ Reservation Shell

✕ Event Confirm (Related) Estimate

✕ Event Invoice

✕ Event Contract

✕ Event Confirm (Detailed) Estimate

Event Confirmation (Detailed)

Event Invoice (Related)

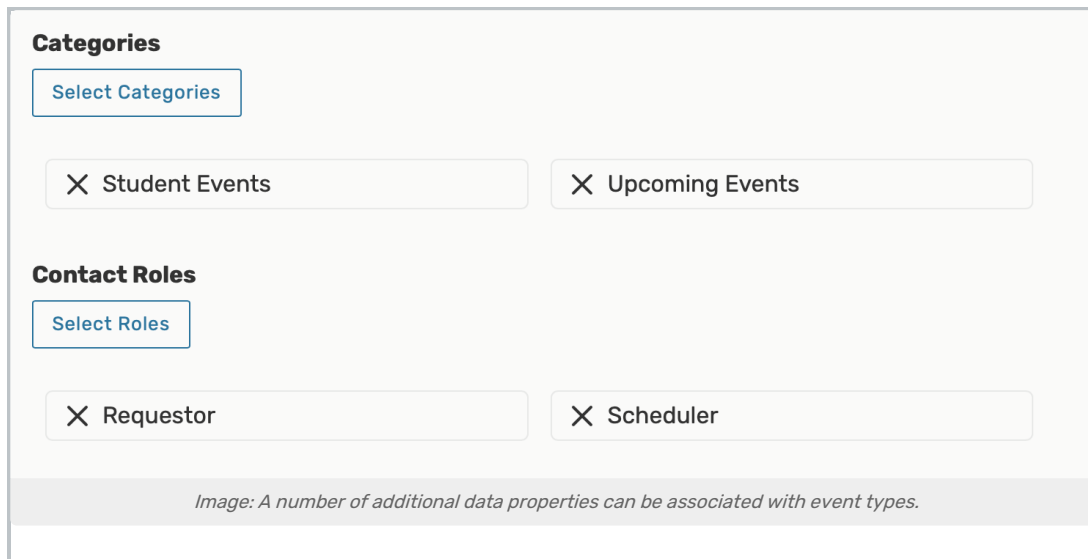
ⓘ
 If Event Contract is selected, then [these document management reports](#) will be added to this event type.
 If Event Organization Shell is selected, then [these document management reports](#) will be added to this event type.
 If Reservation Shell is selected, then [these document management reports](#) will be added to this event type.

Image: Choose which reports you'd like to be associated with the event type.

The next section shows all the reporting options you can add to your new event type. If you associate one or more event reports with an event type, when a new event of that type is created, authorized users can generate any of its associated reports directly from its 25Live event details.

- **Confirmation Notice:** This is a default report attached to confirmation notices for this event type if needed. Select from your existing reports.
- **Invoice Report:** Another default report option to attach to invoices, if needed. Select from your existing reports.
- **Select Reports:** Select which reports you'd like available to be run by authorized users for all events using this event type. You may select all (not recommended for large report lists.)

4. Associate Other Data Properties



Categories

Select Categories

✕ Student Events ✕ Upcoming Events

Contact Roles

Select Roles

✕ Requestor ✕ Scheduler

Image: A number of additional data properties can be associated with event types.

You're given the option to associate additional data with your new event type. If you associate data properties with an event type, when a user creates a new event of that event type, those properties are displayed for selection and data entry when creating an event in 25Live if either of these conditions is met:

- The data property has also been selected for display and the scheduler's security group can view an abridged list of master definitions and has event functional security rights in the Series25 Group Administration tool
 - The exception to the above is Event Categories where those selected for the event type are automatically "checked" (selected), but all other categories are available to be selected by the scheduler
- The user's security group has the appropriate permissions in the [Series25 Group Administration](#) tool

For example, if you attach a "Parking Permit Required" event requirement to the "Community Workshop" event type, when a scheduler creates an event of that type, it automatically has the "Parking Permit Required" requirement as an option if one of the functional security conditions listed above is met.

When schedulers create or edit an event of a particular type using 25Live, the categories, custom attributes, contact roles, and requirements you've selected for that event type (and that are available to schedulers based on the security rights of their security group) are also available for selection in the [Event Details](#) view. Optional data include:

- **Categories**
 - The default event categories of the event type. Once associated with an event type, the selected categories are automatically selected when creating new events of that type
- **Contact Roles**
 - The event roles you want to track for the event type. Once assigned to an event type, the selected role labels are automatically displayed for selection when creating new events of that type. The scheduler can then indicate who will be performing each of the selected roles for a particular event.
- **Custom Attributes**
 - The event custom attributes you want to track for the event type. Once associated with an event type, the selected custom attribute fields are automatically displayed when creating new events of that type. The scheduler can then enter appropriate values for each of the selected custom attributes for a particular event
- **Requirements (Publish to Calendar)**

- The default “Calendar” publishing requirements of the event type. Once associated with an event type, the selected requirements are automatically displayed for selection when creating new events of that type
- **Requirements (Other)**
 - The default “Other” requirements of the event type. Once associated with an event type, the selected requirements are automatically displayed for selection when creating new events of that type

Custom Attributes

Select Custom Attributes

Custom Attributes

<input type="checkbox"/> Would you like 25Live to notify Facilities staff about your event room setup needs?	<input checked="" type="checkbox"/> Will alcohol be served?	<input type="checkbox"/> High Risk Event
<input type="checkbox"/> Club Advisor [Not Active]	<input type="checkbox"/> Alcohol Application Approved	<input type="checkbox"/> Hot Event Image [Not Active]
<input type="checkbox"/> Academic Year	<input type="checkbox"/> Insurance Required	<input type="checkbox"/> Insurance Information Received
<input type="checkbox"/> Contact Name	<input type="checkbox"/> Do you have a valid certificate of insurance for your event?	<input type="checkbox"/> Invoice Paid
<input type="checkbox"/> Contact Phone Number	<input type="checkbox"/> Conflict Decider [Not Active]	<input type="checkbox"/> Last Year's Attendance
<input type="checkbox"/> Contact Email Address	<input type="checkbox"/> Contract Received	<input type="checkbox"/> Maintenance Person In Charge
<input type="checkbox"/> Which calendar should your event appear on?	<input type="checkbox"/> Contract Required	<input type="checkbox"/> Paid in Full
	<input type="checkbox"/> Custodial Needs	<input type="checkbox"/> Payment Received

Done

Image: A standard selection checklist will appear for additional data properties.

For each data property, use the standard 25Live **Select...** button to display a list of checkboxes. Use the filtering search box to narrow down the list. Then, optionally **Select All**, **Select None**, or check individual items. Save your selections using the **Done** button.



Tip: Setting Active or Abridged Status

The best place to check the Active or Abridged status of an event type is in the list view, which you can get to by going to the **List View** and then toggle to the **Event Types** view at the top.

5. Set Notification Policy

Notification Policy

Approval Type

By at least one

Approval required within
Days

7

 Hours

0

 Minutes

0

(of event creation date)

×

Mozart, Wolfgang

×

Smith, Jane

Notify only

Approval required

Add Contact

Select a Contact

Image: Setting Notification Policy for event types is an essential part of creating an event workflow.

When a user creates an event using this new type, the notification is automatically sent to the 25Live Task List of the user(s) specified in the notification policy. For example, you could define a notification policy that sends an Approval Required notification to the Task List of the Dean of Students every time an event is created.

Use the **Approval Type** dropdown menu to choose the notification policy options:

- **No Notification Policy**
- Approved **By at least one** of the users associated with the notification that will be sent
- Approved **By all** users associated with the notification that will be sent

When choosing one of the two approval options, you can set a time limit within which the user(s) associated with the notification must act. Complete the number of **Days**, **Hours**, and/or **Minutes** after the notification creation date that action must be taken. Use positive integer values.

To **Add Contact**, open the **Select a Contact** dropdown to perform a full or partial name search for a user you want to associate with the notification policy, then click or tap on the name. Use the dropdown search again to add additional names. Use the **X** next to any name to remove it.

For each associated user, choose the type of notification they should receive:

- **Notify only**
- **Approval required**

6. Save Your New Event Type

Use the **Save** button at the bottom to save your new event type. After saving, you will view your new event type in the hierarchy view. Use the link on its name to edit the type.

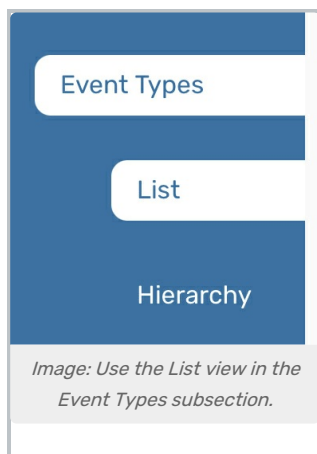
Editing Event Types – Basic Event Type Information



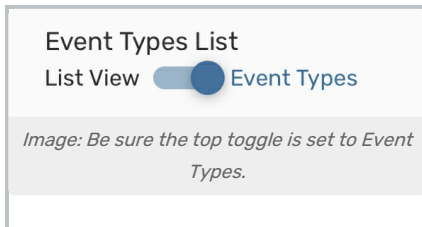
Note: You Can Also Bulk Edit Event Types

See [Bulk Editing Event Types in Master Definitions](#)

1. Go to the List View in the Event Types Subsection



The Event Types subsection has two main views, List and Hierarchy. The **List** view is the best place to view all current event types and create new ones.



Be sure the **Event Types List** toggle at the top of the view is set to **Event Types** to find and edit an Event Type.

2. Find the Event Type You Wish to Edit

Event Types List

List View

Event Types

Event Type List Report

Event Types

Filter:

Save Sort

	Id	Name		Active Unselect All	Abridged Select All	Usage	Report	Delete	Force Delete
⋮	9	Athletic Practice		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	13	Auction		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	15	Break-out Session		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	16	Calendar Announcement		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	17	Camp		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	18	Campus Visit		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	19	Ceremony		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	20	Clinic		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	21	Competition / Tournament		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	22	Conference		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>
⋮	23	Convocation		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<div>View</div>	<div>View</div>	<div>Delete</div>	<div>Force Delete</div>

Image: Event Types in the 25Live System Settings display.

You can filter and reorder the list and edit some values.

- Manually reorder items using the six-dotted handle icon on the left side of the list
 - Note: If you manually change the sort order of Event Types, that order will be reflected in the [Event Form](#).*



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.

- The **Id** number for each item is listed
- Edit the **Name** of the item
- Make sure the the **Active** toggle is enabled (*also available via the Deactivate button in the advanced detail editing view*)
 - Note: Deactivating an event type means events can't be created with the deactivated event type, but any existing event of that event type is preserved in the Series25 database, and you can report on previous events with that event type. You can also reactivate an event type if you decide you need it again in the advanced detail editing view.*
- The **Abridged** checkbox controls if the item is only visible on an abridged list for users with limited permissions
- View the **Usage** of the item in searches
- Use the **Report** column to run the "Master Definition Usage - Excel" report to export usage information
- 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.

Editing Event Types – Advanced Event Type Details



Note: You Can Also Bulk Edit Event Types

See [Bulk Editing Event Types in Master Definitions](#)

1. Go to the List View in the Event Types Subsection

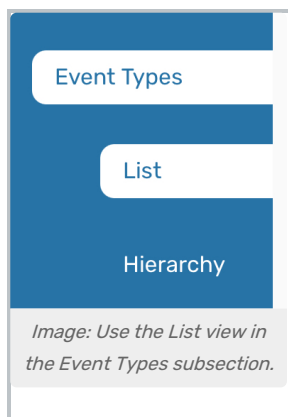


Image: Use the List view in the Event Types subsection.

The Event Types subsection has two main views, List and Hierarchy. The **List** view is the best place to view and edit all current event types.

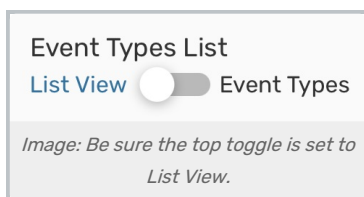


Image: Be sure the top toggle is set to List View.

Be sure the **Event Types List** toggle at the top of the view is set to **List View** to edit an Event Type.



Tip: Finding All Event Types

Event Types with a negative ID are filtered out of the list view. If you don't see an event type you expect to see, try toggling the **Event Types List** option to **List View**.

2. Choose the Event Type to Edit

<div> <div>Event Types</div> <div>Cabinets</div> <div>Folders</div> <div>Create New</div> <div>Bulk Edit</div> <div>Select Columns</div> <div>?</div> <div>Help</div> </div>								
<input type="checkbox"/>	Name	Custom Attributes	Requirements	Cabinets	Folders	Usage	Copy	View in Hierarchy
<input type="checkbox"/>	Athletic Practice	Collapse	View	View	View	View	Copy	Hierarchy
<div>Custom Attributes</div> <ul style="list-style-type: none"> Will you be serving food? If Canceled, Notify Will alcohol be served? Do you have a valid certificate of insurance for your event? Detail Image Event Image Hot Event Image Registration Form Web Site <div>Collapse</div>								
<input type="checkbox"/>	Auction	View	View	View	View	View	Copy	Hierarchy
<input type="checkbox"/>	Break-out Session	View	View	View	View	View	Copy	Hierarchy

Image: Use the View buttons then Collapse to see more info for each event type before using the link on its name to edit.

In the List View for event types, you can use the **View** button in the columns to view the advanced details for any of the event types. Additionally, you can switch to the **Hierarchy** view in which you can also edit event types.

Tap or click on the name of the event type to open its editing view.

3. Change Advanced Details Views

The "Edit Event Type" view is the same view you may have used when creating an event type. You can change any of the values and options. See the ["Adding Event Types"](#) section above for details on the meanings and uses of each field.

When editing additional associated data, such as Categories, Contact Roles, Custom Attributes, and Requirements, use the **X** icon next to any item to remove its association with this event type. Use the **Select...** buttons to add more.



Tip: Editing Active or Abridged Status

The best place to edit the Active or Abridged status of an event type is in the basic editing view, which you can get to by going to the **List View** and then toggle to the **Event Types** view at the top.

4. Save Your Changes or Choose Other Actions

Save

Delete

Force Delete

Deactivate

Copy

Cancel

View in Hierarchy

View in List

Image: A variety of options are available when copying an event type.

Use the **Save** button to save your edited changes.

If you wish to delete this event type, consider it carefully, then use the **Delete** or **Force Delete** button.

You have an option to **Deactivate** the event type. Deactivating an event type means events can't be created with the deactivated event type, but any existing event of that event type is preserved in the Series25 database, and you can report on previous events with that event type. You can also reactivate an event type if you decide you need it again by entering this edit view.

Then you may **Copy** this event type, which will show the new, copied type in the hierarchy view. You can then tap or click on its name to edit its details and save.

The **Cancel** button will cancel all your changes.

Copying Event Types

See the "[Editing Event Types - To Edit Advanced Event Type Details](#)." There is a **Copy** column in the table view. You can also enter that advanced detail editing view, then use the **Copy** button at the bottom. The new, copied type will be shown in the hierarchy view. You can then tap or click on its name to edit its details and save.

Deactivating an Event Type

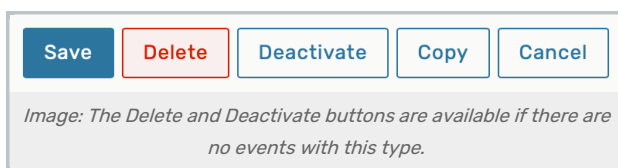
Deactivating a cabinet type, folder type, or event type means that new cabinets, folders, or events can no longer have that type.

1. Access the Event Type

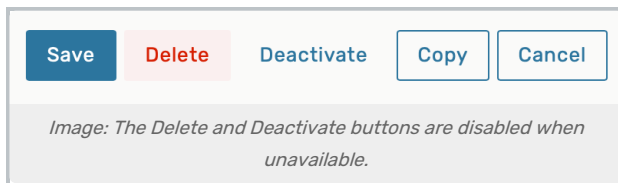
Go to the **List View**. Be sure the **Event Types List** toggle at the top of the view is set to **List View** to edit an Event Type. Tap or click on the name of the event type to open its editing view.

2. Deactivate, if Available

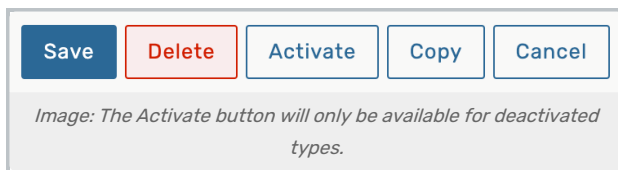
If all the events within this event type are deleted, the **Deactivate** button will be available.



If the action isn't available, the Deactivate button will be disabled without an outline.



Once deactivated, the button will be replaced with the **Activate** button. Pressing Activate will reverse the deactivation.



Deleting Event Types

You can delete an event type from the **List - Event Types** view, or you can go into the advanced details edit mode and then use the **Delete** or **Force Delete** buttons at the bottom — *with caution*.

If you want to preserve the event type for reports or future use instead of deleting it, you also have the option to **Deactivate** an event type using the button at the bottom of the full advanced details editing view. Deactivating an event type means events can't be created with the deactivated event type, but any existing event of that event type is preserved in the Series25 database, and you can report on previous events with that event type. You can also reactivate an event type if you decide you need it again by entering the advanced detail editing view.
