

## Adding and Editing Roles in 25Live

25Live allows you to add and edit roles for events and organizations in the [Master Definitions](#) section of the [System Settings](#) area.

### How To Access Master Definitions



#### Security Note

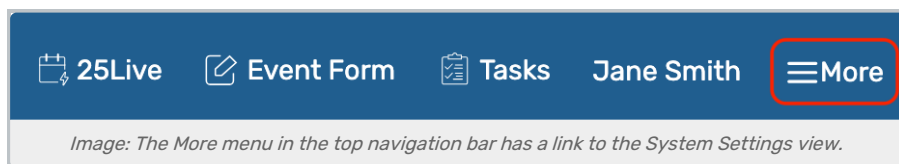
To access Master Definitions System Settings views, your 25Live user must have security permissions set in [Series25 Group Administration](#) for each of the types that you wish to access, including:

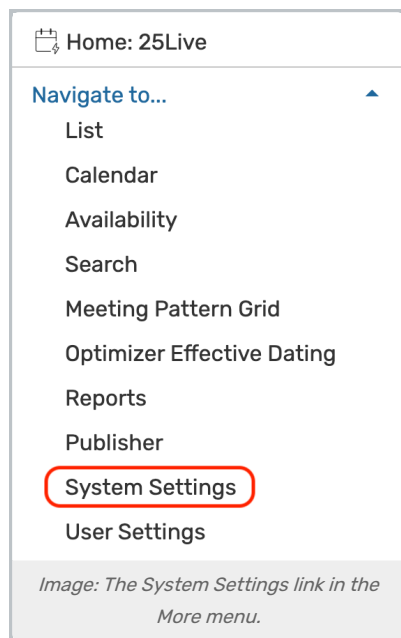
- Events: *Admin: 6.0 Manage Event Master Lists*
- Event Requirement Notification Policy: *Admin: 7.0 Set Event Notification Policy*
- Event Types: *Admin: 5.2 Manage Event Type Hierarchy*
- Locations: *Admin: 10.2 Manage Location Master Lists*
- Resources: *Admin: 11.2 Manage Resource Master Lists*
- 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

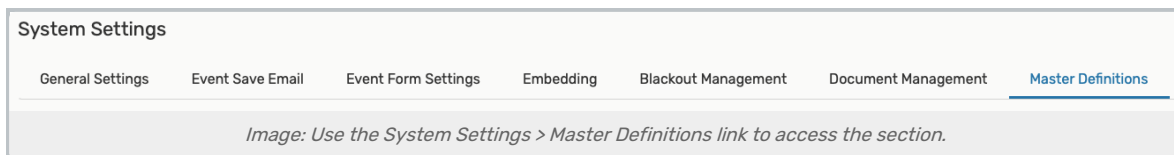
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).





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

## Available Role Types

You can create roles for the following object types:

*Ordered from lowest to highest permissions...*

#### View Only

People who only need to view information  
(ex: View Only: Facilities, View Only: Catering)

#### Requestor

Lowest level users/requestors, you might have multiple groups with different permissions  
(ex: Requestor: Faculty/Staff, Requestor: Students)

#### Approver (or Service Provider)

People who need access to edit or approve specific objects  
(ex: Approver: A/V Resources, Approver: Music Locations, Approver: Student Groups)

#### Scheduler

High level users who need advanced event editing permissions; may also have approving responsibilities  
(ex: Scheduler: Academics, Scheduler: Events, Scheduler: Athletics)

#### Administrator

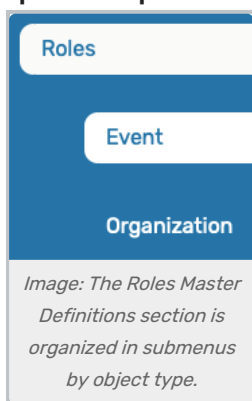
High level users who have permissions for most system settings (the only differences between a functional & system admin are that functional administrators don't have override or delete permissions)

*Image: Typical roles used with 25Live events.*

- Event – functions contacts may perform for an event (such as Emergency Contact, Facilitator, etc.)
  - Create roles for all the activities contacts might potentially perform for events so schedulers and other users can direct information and requests to the appropriate person
  - Include only roles you want to track
- Organization – roles contacts may perform within an organization
  - Create contact roles that are generic descriptions of jobs (example, Publicity Contact), not job titles

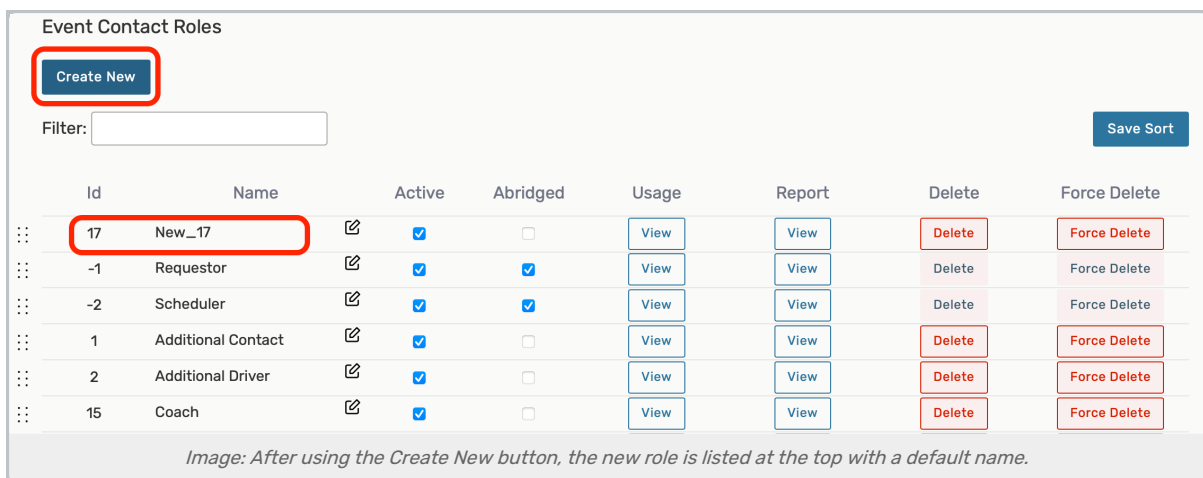
## How To Add Roles

### 1. Open a Specific Role Type View



The Roles view within the Master Definitions section has submenus organized by object type for Event and Organization.

## 2. Use the Create New Button



Event Contact Roles

Create New

Filter:

Save Sort

Id	Name	Active	Abridged	Usage	Report	Delete	Force Delete
17	New_17	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>
-1	Requestor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>
-2	Scheduler	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>
1	Additional Contact	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>
2	Additional Driver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>
15	Coach	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">View</a>	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Force Delete</a>

Image: After using the Create New button, the new role is listed at the top with a default name.

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

## 3. Rename the New Role

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

## Editing Roles

Both types of role allow you to 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
- (for Event Roles) 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 events, searches, etc.
- 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.

If you manually change the sort order of Event contact roles, that order will be reflected in the Event Form.



**Tip: Manually Sorting Item Display Order**



Categories	Id	Name	Active	Abridged	Schedule25	Usage	Delete	Force Delete
Rules	1	ADA Accessible	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	View	Delete	Force Delete
	2	Air Conditioning	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	Delete	Force Delete
Requirements	4	AV - Document Camera	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	Delete	Force Delete
	5	AV - DVD Player	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	Delete	Force Delete
Features	6	AV - Instructor Station	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	Delete	Force Delete
	7	AV - Internet - Ethernet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	View	Delete	Force Delete

*Animation: Drag the row to manually set the 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.