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: 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.

1. Go to the System Settings View

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

Image: The More menu in the top navigation bar has a link to the System Settings view.

Image: The System Settings link in the More menu.
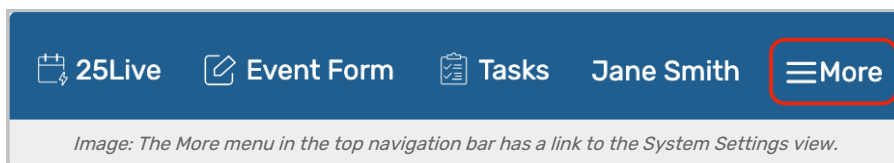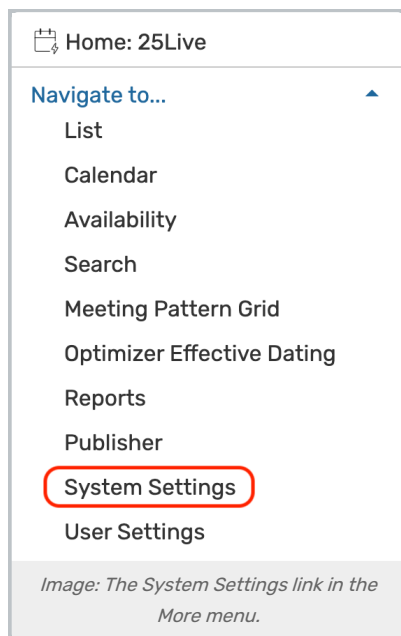
2. Tap or Click the Master Definitions Link

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

Image: Use the System Settings > Master Definitions link to access the section.
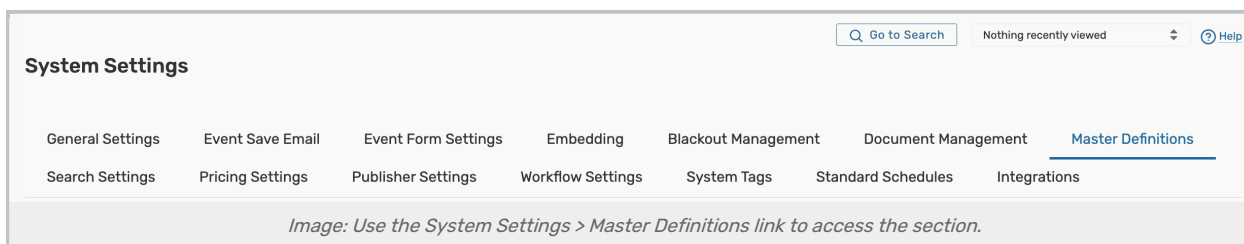
See *Working With Master Definitions* for details on general navigation within the Master Definitions section and actions available to all types.

Available Role Types

You can create roles for the following object types:

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

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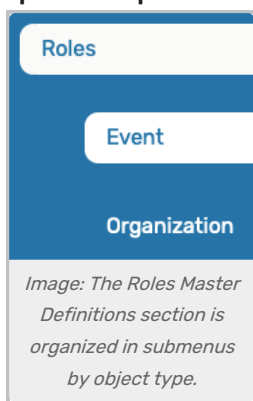
The Roles view within the Master Definitions section has submenus organized by object type for Event and Organization.

2. Use the Create New Button

	Order	ID	Name		Active	Usage	Report	Delete	Force Delete
⠿	1	10	New_10	✎	✓	View	View	Delete	Force Delete
⠿	2	9	Historian	✎	✓	View	View	Delete	Force Delete
⠿	3	7	Treasurer	✎	✓	View	View	Delete	Force Delete
⠿	4	6	Club President	✎	✓	View	View	Delete	Force Delete
⠿	5	5	Security Personnel	✎	✓	View	View	Delete	Force Delete

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

Edit each list or item with the following actions:

- You can click and drag using the six dot symbol (⠿) on the left to reorder items OR you can enter a new order number in the **Order** column text box

- The **Id** number for each item is listed

- Edit the **Name** of the item

- Check or uncheck the **Active** status

- *(Event Roles only)* The **Abridged** checkbox controls if the item is only visible on an abridged list for users with limited permissions

- *(Event Roles only)* The **Tags** column lets you add System Tags filtering and searching throughout 25Live

- **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**

Order	ID	Name
1	87	Featured Events
2	-90	OutlookCalendarId
3	80	Would you like 25Live to notify Facilities staff about your event room setup needs?
4	89	What is your second location preference?
5	78	Club Advisor
6	71	Academic Year
7		

Animation: Drag the row to manually set the display order or a type an order number into the Order column.

You can manually set the order of items displayed by clicking on the row icon (⠿) and dragging up or down.

In some master definition lists, you can also enter a numeric value in the **Order** column to immediately change the order.

Use the **Save Sort** button to save the order.