

25Live Rules and Event Calendars

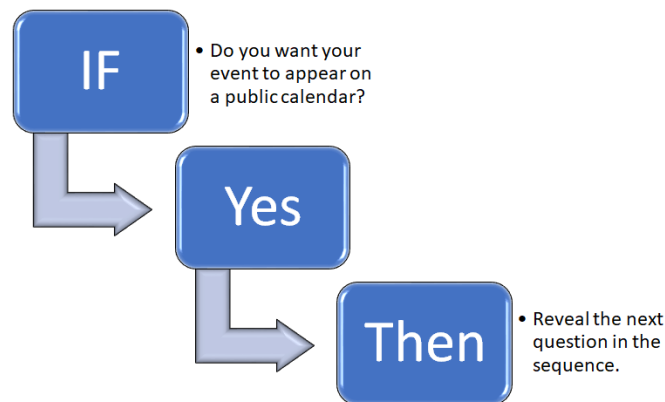
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In the past, the only mechanism available to a campus that didn't want to reveal their calendar event categories to requestors was to employ the (often clunky-looking) calendar requirements. There is nothing wrong with taking that approach, but now **Rules** can handle calendars with a bit more finesse.

How Rules Work

Rules provide a choose-your-own-adventure approach for driving calendar requests by allowing you to tailor the custom attributes that appear on users' event forms to your needs. Generally, a calendar process, driven by a robust use of rules will be kicked off with an initial question like "Do you want your event to appear on a public calendar?" and a Boolean data type, (meaning it has a **Yes** or **No** answer.) This question would be built as an event custom attribute and attached to all of your event types in 25Live, working as follows:



So now that you have a feeling for how this process will work, what infrastructure will you need to build?

Building the Infrastructure for a Rules Driven Calendar Request System

There are any number of ways you could set your structure up. However, this approach is one in actual use by a number of institutions to drive calendar selections.

1. Build the Initial Question

To build the initial question for your rules-based calendar request system:

- Navigate to the **System Settings → Master Definitions** in 25Live.
- Choose the **Boolean** data type from the dropdown menu and click the **Create** button.

- This creates a new event custom attribute that you will need to name by clicking the **Edit** button.

Id	Name	Active	Type
70	New_70	<input checked="" type="checkbox"/>	Boolean
69	SOS25 Featured Event V2	<input checked="" type="checkbox"/>	String

- Modify the **Name** and **Save** your changes.



Note: A Few Event Custom Attributes Are Generally Not Part of a Rules Structure

A small number of event custom attributes related to published calendars should not be part of your **rules** structure. Generally, when people drive their calendars with an initial question, they will require a response from all requestors and schedulers to the calendar question. Since that question is required, all of the additional event custom attributes revealed based on the initial rule will also be required. The event custom attributes that should be attached to your event types and not attached to your event rules include:

- Event Image
- Detail Image
- Featured Event
- Web Site

2. Connect the New Event Custom Attribute to Event Types

Now that you have your initial question created, you need to attach it to all of your event types (except for academic event types like Section and Exam).

- Navigate to **System Settings → Master Definitions → Event Types → List**. Toggle the view to **List View**.

Event Types List

List View ☐ Event Types

Filter:

Sort By:

Event Types

Create New

Name	Custom Attributes
Athletic Practice	<div>View</div>
Auction	<div>View</div>
Break-out Session	<div>View</div>
Calendar Announcement	<div>View</div>

Image: Event Types List

- Select an Event Type from the list.
- Scroll down to **Custom Attributes** and click the **Select Custom Attributes** button to make modifications.

Custom Attributes

Select Custom Attributes

Do you have a valid certificate of insurance for your event?

If Canceled, Notify

Registration Form

Will you be serving food?

Image: Example Custom Attributes attached to an Event Type

- Select your initial leading calendar question, **Detail Image**, **Event Image**, **Featured Event**, and **Web Site** custom attributes to add to your event types and press **Done**.



Tip: Add Only What You Need

Don't forget that you only need to add the initial question and the other four event custom attributes listed above if you are using rules to drive your calendar selection process. The rule structure will take care of adding any additional calendar custom attributes based on response to the first and follow-up questions.

Custom Attributes

Select All Select None

<input type="checkbox"/> Day Of Event Contact Phone Number	<input type="checkbox"/> Do you have a valid certificate of insurance for your event?	<input checked="" type="checkbox"/> Featured Event	<input type="checkbox"/> SIS Instruction Method/Mode
<input type="checkbox"/> Will you be serving food?	<input type="checkbox"/> Conflict Decider [Not Active]	<input type="checkbox"/> Fee Waiver Approve By	<input type="checkbox"/> SIS Term Code
<input type="checkbox"/> Please indicate which vendor you'll be using for food.	<input type="checkbox"/> Contract Received	<input type="checkbox"/> Fee Waiver Approved	<input type="checkbox"/> Special Needs
<input type="checkbox"/> Please indicate your audience	<input type="checkbox"/> Contract Required	<input type="checkbox"/> High Risk Event	<input type="checkbox"/> WDYT Event Survey [Not Active]
<input type="checkbox"/> Will there be unaccompanied minors present at the event?	<input type="checkbox"/> Custodial Needs	<input type="checkbox"/> Hot Event Image [Not Active]	<input checked="" type="checkbox"/> Web Site
Explain how minors will be expected to participate in the event.	<input type="checkbox"/> Deposit Received	<input type="checkbox"/> Insurance Information Received	<input type="checkbox"/> X25 CIP Code
<input type="checkbox"/>	<input type="checkbox"/> Deposit Required	<input type="checkbox"/> Invoice Paid	<input type="checkbox"/> Allow Registration
	<input checked="" type="checkbox"/> Detail Image	<input type="checkbox"/> Last Year's Attendance	

Done

Image: Edit custom attributes window.

- **Save** your changes.

At this point, you have successfully completed your event type modifications and are ready to begin building your follow-up calendar event custom attributes.

3. Build Follow-up Calendar Questions

If a user answers **Yes** to your initial question, you'll want to present them with a follow-up question that asks them to select a calendar for their event.

To add your first follow-up event custom attribute:

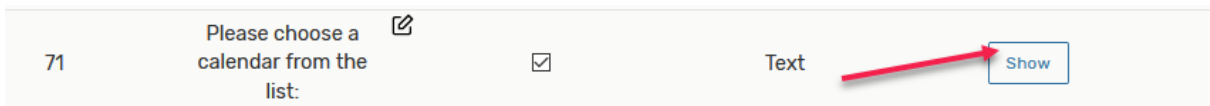
- In **System Settings → Master Definitions**, create a new custom attribute of the **Text** data type.



Type: Text

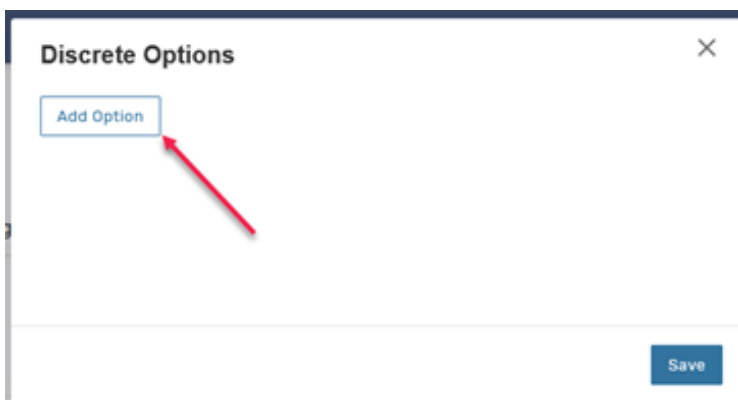
Create New

- Name it something similar to **Please choose a calendar from the list**.
- Click the **Show** button to begin setting up your list of discrete options.



71 Please choose a calendar from the list: ☒ Text Show

- Click the **Add Option** button to add your first selection.

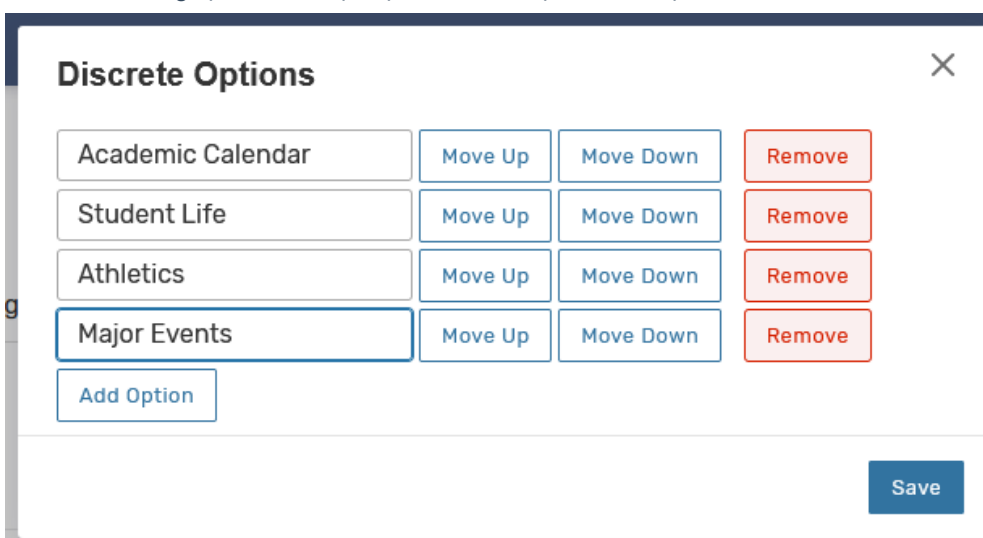


Discrete Options

Add Option

Save

Continue adding options until you provide a complete list of possible



Discrete Options

Academic Calendar	Move Up	Move Down	Remove
Student Life	Move Up	Move Down	Remove
Athletics	Move Up	Move Down	Remove
Major Events	Move Up	Move Down	Remove

Add Option

Save



Tip

Notice that the list is not alphabetized? Use the **Move Up** and **Move Down** buttons to move the entries

around and get them alphabetized.

- When you are satisfied, click the **Save** button. You have now successfully turned a **Text** data type field into dropdown list of discrete options.

What if there are instances where you want to allow a requestor a second calendar for their event to populate on? In that case, you could create a secondary question (data type: Boolean) that would simply ask **Does your event need to appear on another calendar as well?** Answering in the affirmative **Yes**, would reveal a second discrete list of calendar options (simply a replication of your first list in a new event custom attribute. In this case, the question following an affirmative response would be something along the lines of **Please select a secondary calendar for your event.**

You will also want to make sure that you use the **Sort Order** functionality in **System Settings → Master Definitions → Event Custom Attributes** to sort the questions in the order that you want them to appear. Use the drag-and-drop capability to position the questions in the right order and then click the **Save Sort** button to commit your changes.

You may ask as many questions related to calendars as you need. For instance, let's say you wanted to ask the requestor if they would like their event reviewed to determine if it should be a featured event, you could ask an additional question like: **Would you like your event to be reviewed for becoming a featured event?** This event custom attribute would use the **Boolean** data type.

4. Set Up Notifications

Obviously, you will need some sort of notification system working so that the person or persons responsible for reviewing all these requests will know what requestors want and can then attach the appropriate categories to those events. Using the Rules, do one of the following:

- Based on an affirmative response to the initial question, you may set a general **Calendar (Requirement)** with an associated notification policy to one or more users (e.g., Review Calendar Request).
- OR**
- Based on the calendar selected from the discrete options list, you may set a separate **Calendar (Requirement)** with notification policy going to one or more other users based on which calendar was selected by the requestor.

5. Build a Calendar Requirement

You may build calendar requirements in 25Live now as well. You will build these new requirements in the **System Settings → Master Definitions → Events → Requirements → Calendar** section of 25Live.

System Settings

General Settings

Event Save Email

Event Form Settings

Configure Theme

Embedding

Grid Coloring

Blackout

Custom Attributes

Categories

Roles

Requirements

Other

Calendar

Features

Filter:

	Id	Name	Active	Notification Policy
⋮	19	Please add my event to the Academic Calendar.	<input checked="" type="checkbox"/>	Show
⋮	18	Please add my event to the College of Arts and Sciences Event Calendar.	<input checked="" type="checkbox"/>	Show
⋮	13	Publish to a Web Calendar	<input checked="" type="checkbox"/>	Show
⋮	17	Publish to Committees Calendar	<input checked="" type="checkbox"/>	Show
⋮	11	Publish to Main Events Calendar	<input checked="" type="checkbox"/>	Show
⋮	16	Publish to Student Life Calendar	<input checked="" type="checkbox"/>	Show

Save Sort

Once you have created the corresponding requirements, you use the **Show** button to open the **Notification Policy** to set up a notification task for a user or a group of users for each calendar requirement that you create.

If you build separate calendar requirements for each calendar option, you may have different sets of users notified to review and set the category or resource driving the calendar. However, you do not need to attach these calendar requirements to your event types *if* they are part of your rules. If these are incorporated into your rules, the rule will add them to the event without the requirement needing to be automatically associated with the event type. This simplifies the event form for your requestors.

6. Require a Response to the First Question in the Rule Structure

Using this approach, you will very likely want to require all of your users to respond to the initial calendar question by making use of the **Security Group** options in 25Live Group Administration. You will need to visit [Event Form Presentation by Security Group](#) and for each security group specify that the initial calendar question is a required response. Remember that if you take this step any custom attributes associated with the initial question drive by your rules framework will become required as well.

3. What **Event Custom Attributes** are required when **Creating and Editing Events**?

☐ No required Event Custom Attributes

☒ Require these Custom Attributes (when applicable):

Paid in Full

Payment Received

Priority Override

Rain Location

Hold ctrl while clicking to select or deselect additional items

Building the Rules for Your Calendar Framework

Once you have all of your infrastructural elements built, you are ready to deploy rules to drive the process. Rules are built in the **System Settings → Event Form Settings** group.

1. Build the Initial Rule

- In **System Settings → Event Form Settings**, select the **Rule Settings** option and click the **Add New Root Rule**.

The screenshot shows the 'Rule Settings' page. On the left is a sidebar with 'Config Settings', 'Rule Settings' (selected), 'Default Settings', and 'Event Quotas'. The main area has a 'Filter:' input and a table of rules. The table has columns: Rule Name, Target Action, Targets, and Edit. Below the table is an 'Add New Root Rule' button, which is highlighted with a red arrow. Below the button is a caption: 'Image: Add New Root Rule button in Rule Settings'.

Rule Name	Target Action	Targets	Edit
Alert: Ext Vendor/Cleaning	Alert User		Edit
CA Nest: Minors Present (Y)/Explain	Add Custom Attributes	• Explain how minors will be expected to participate in the event.	Edit
CA Nest: Rain Cancellation/N	Add Custom Attributes	• Rain Location	Edit
CA Nest: Rain Cancellation/Y	Add Custom Attributes	• If Canceled, Notify	Edit
CA Nest: Std/Alcohol/Public - Minors	Add Custom Attributes	• Will there be unaccompanied minors present at the event?	Edit
CA Nest:Food (Y)/Vendor	Add Custom Attributes	• Please indicate which vendor you'll be using for food.	Edit
Cal Req Add: CA Calendars	Add Calendar Requirement	• Send to Campus Calendar	Edit
Conference - Resources	Add Recommended Resources	• AV - Data Projector	Edit
Food	Add Recommended Resources	• FS - Cupcakes • FS - Coffee	Edit
Resource Add: AV Tech	Add Resources	• AV - Technician	Edit
Resource Add: Officer	Add Resources	• PS - Security Officer	Edit
Resources: Ballroom/Ext Vendor	Add Resources	• FAC - Trash Can • FAC - Recycle Bin	Edit

- The **Form Rule Settings** will open. Give the rule a **Name** that will indicate what the rule is accomplishing (e.g., Initial Calendar Question). The **Operator** may be left to **and** because you will only have one condition for this rule. But, it is possible to have multiple conditions and even nested conditions as part of a rule.

Create New Rule

Name:

AND
⬆

Operator: and ⬆

[Add Condition](#)
[Add Nested Condition](#)

Target Type: Add Custom Attributes ⬆

[Select Targets](#)

[Save](#)

[Cancel](#)

- Click the **Add Condition** button to open the first conditional item and make sure that the **Source Type** is set to

Custom Attribute. From the accompanying dropdown list of custom attributes, select your initial calendar question from the list, set the **Operator** to **equals (=)** and toggle the response to **Yes**.

Create New Rule



Name:

AND

Operator: and

Custom Attribute Will you be serving food?

Source: Custom Attribute

Attribute: Will you be serving food?

Operator: =

Value: No ☒ Yes

Remove

Add Condition

Add Nested Condition

Target Type:

[Select Targets](#)

[Save](#) [Cancel](#)

- Now, you need to select your **Target Type** by selecting **Add Custom Attribute** and clicking the **Edit Targets** to select the event custom attribute using the discrete list of food vendor choices.

Create New Rule

×

AND

Operator: and

Custom Attribute Will you be serving food?

Source: Custom Attribute

Attribute: Will you be serving food?

Operator: =

Value:

No

Yes

Remove

Add Condition

Add Nested Condition

Target Type: Add Custom Attributes

Select Targets

Please indicate which vendor you'll be using

×

for food.

Save

Cancel

- Save your new rule to apply it to your event forms.

2. Build Subsequent Rules

If you wanted to present a question about placing the event on a second calendar after the first calendar selection has been made, you would build the rule illustrated in the following image.

Create New Rule



AND

Operator:

and

Custom Attribute Which calendar should your event appear on?

Source:

Custom Attribute

Attribute:

Which calendar should your event appear on?

Operator:

in

Value:

Main Campus Calendar

Value:

Department Specific Calendar

Remove

Add Another Value

Add Condition

Add Nested Condition

Target Type:

Add Custom Attributes

Select Targets

X Does your event need to appear on another calendar?

Notice that the rule relies on your calendar selection custom attribute. It basically indicates that if the choice is any of the calendar discrete options then reveal the follow-up question, **"Does your event need to go on another calendar?"**. Since this data field is a Boolean data type, an affirmative answer will reveal a second custom attribute to collect the name of the second calendar the event should appear on. This rule would look almost identical to the very first rule in your framework (see below).

Create New RuleName:

AND

Operator:

Custom Attribute Will you be serving food?

Source:

Attribute:

Operator:

Value:

No
☒
Yes

Target Type:

Choose a second calendar for your event to
 populate

With this approach, you are slowly revealing a logical progression of follow-up questions but only if the answer to the initial calendar question was **Yes**. Otherwise, these fields remain hidden and do not clutter up the view of the user.

We could take this process one step further and talk about **Featured Events**. Obviously, you will not want to reveal your **Featured Events** custom attribute to your event requestors. After all, are not all events featured events? We know that not all events are truly "featured" events. In this case, we may want to give a requestor a way to indicate that they want their event to be featured. A simple rule based off the affirmative answer to our initial question will suffice to reveal this question (see below).

Create New Rule**AND**

Operator: and

Custom Attribute Will you be serving food?

Source: Custom Attribute

Attribute: Do you want your event on a public calendar?

Operator: =

Value: No ☒ Yes

Remove

Add Condition

Add Nested Condition

Target Type: Add Custom Attributes

Select Targets

Would you like your event reviewed for
 X becoming a featured event?

Save

Cancel

Setting up Rule to Set Calendar Requirements

Now that we have all the rules in place for our key questions concerning calendars, we need to automate the process of getting the Requirements (Calendar) set with notification policies. If you need only one calendar requirement for all your different calendars, you will only need one additional rule. However, if you need a calendar requirement for each calendar because different sets of users will review these requests, you will need one rule for each separate calendar and its corresponding calendar requirement.

To build a calendar requirement rule to set a single calendar requirement, you would base your rule on the initial calendar question. An affirmative answer would be used to automatically set the calendar requirement as shown in the image below.

Create New RuleName:

AND ^

Operator:

Custom Attribute ^

Source:

Attribute:

Operator:

Value:

No ☒ Yes

Target Type:

In those cases, where you need separate calendar requirements based on each calendar selected, you will need multiple rules. Each rule will be use the two calendar choice custom attributes to set a Calendar requirement as show below.

Create New RuleName:

Name:

OR

Operator:

Custom Attribute

Source:

Attribute:

Operator:

Value:

Remove

Custom Attribute

Source:

Attribute:

Operator:

Value:

Remove

Add Condition

Add Nested Condition

Target Type:

Select Targets

☒ Publish to Student Life Calendar

Save

Cancel

Notice that we have added a second condition joined with an **OR operator**. This means that if either the first or the second calendar is set to **Student Life** the rule will automatically attach the **Publish to Student Life Calendar** notification to the event executing the notification policy tied to the requirement. You will repeat this process for each of your calendar choices. However, the requirements will not be natively associated with the event type meaning that your requestors will never see these requirements on their event forms.

Event Form Configuration Settings

You will also need to check your event form configuration settings to ensure that the custom attributes attached to the event type will display by default. To check these settings:

1. Go to **System Settings → Event Forms → Configure Settings** and select an event form from the **Select a Config to edit** dropdown menu.

Config Settings

Select a Config to edit: Event Requestors Wizard

Automatically Open Help Message:

Event Name	No <input type="checkbox"/> Yes <input type="checkbox"/>	Expected Head Count	No <input type="checkbox"/> Yes <input type="checkbox"/>
Event Title for Live Calendars	No <input type="checkbox"/> Yes <input type="checkbox"/>	Promotional Information	No <input type="checkbox"/> Yes <input type="checkbox"/>
Event Type	No <input type="checkbox"/> Yes <input type="checkbox"/>	Event Date and Time	No <input type="checkbox"/> Yes <input type="checkbox"/>
Primary Sponsoring Organization	No <input type="checkbox"/> Yes <input type="checkbox"/>	Event Locations	No <input type="checkbox"/> Yes <input type="checkbox"/>
Co-sponsoring Organizations	No <input type="checkbox"/> Yes <input type="checkbox"/>	Event Resources	No <input type="checkbox"/> Yes <input type="checkbox"/>

Automatically Add Custom Attributes:

No ☐ Yes ☒

Allow Spans Midnight Events:

No ☐ Yes ☒

Allow Add/Remove Segments:

No ☐ Yes ☒

2. Locate the **Automatically Add Custom Attributes** setting and make sure it is toggled to **Yes**.
3. Finally, if you have put specific instructions for filling out the custom attributes on your event forms, use the **Automatically Open Help Message** and set the **Custom Attributes** edit to **Yes** so that the instructions display by default.
4. When you are finished, click the **Save** button to save the settings for this event form. Repeat this process for each of your event forms.

Typically, the initial calendar question, **Event Image**, **Detail Image**, and **Web Site** event custom attributes should appear on the Requestor's event form. Approver-level users would also likely see **Featured Events** by default.

What If I Want A Rule to Set a Resource?

Some institutions send events to their major calendars using calendar resources. This allows them to make use of assignment policy and control based on assigning or denying of requests as to whether any given event gets onto a specific calendar. But, what if you do not want requestors to have to request the resource? Rules may also be used to add a specific resource. For instance, maybe you wanted to drive your Student Life calendar with a resource so that a task would route to the approver of that calendar for review. In this instance, your rule would be set up to add the appropriate calendar resource based on the calendar selected from the list of options on the event custom attribute. Again, this rule will be a little more complex if you are allowing them to select multiple calendars. So, let's take a look at the two approaches. If I am only allowing each event request to only select one calendar in my rules, then I would create a rule to add a Calendar - Student Life resource based on the response to the **Choose a calendar** question (see below).

Create New RuleName:

OR ^

Operator:

Custom Attribute ^

Source:

Attribute:

Operator:

Value:

Remove

Target Type:

In the case of the two calendars option that we have outlined, the rule will require to conditions with an **Or operator** and would like the following image.

Create New RuleName:

OR

Operator:

or

Custom Attribute

Source:

Custom Attribute

Attribute:

Choose a calendar for your event.

Operator:

=

Value:

Student Life

Remove

Custom Attribute

Source:

Custom Attribute

Attribute:

Choose a second calendar for your event.

Operator:

=

Value:

Student Life

Remove

Add Condition

Add Nested Condition

Target Type: Add Resources

Select Targets

✕ Calendar - Student Life

This rule allows you to capture the Student Life choice on either the first or the second calendar selections.

If we use this approach, we would not need to set calendar requirements and would allow assignment policy and task workflow to route the request to an appropriate approver for review.

Rules give us a wealth of possibilities for structuring robust sets of questions and can be structured to be progressive in nature. You should spend the time to learn how to employ these for your calendar workflows and more.
