# 25Live Rules and Event Calendars

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:

IF
• Do you want your event to appear on a public calendar?

Yes

Then
• Reveal the next question in the sequence.
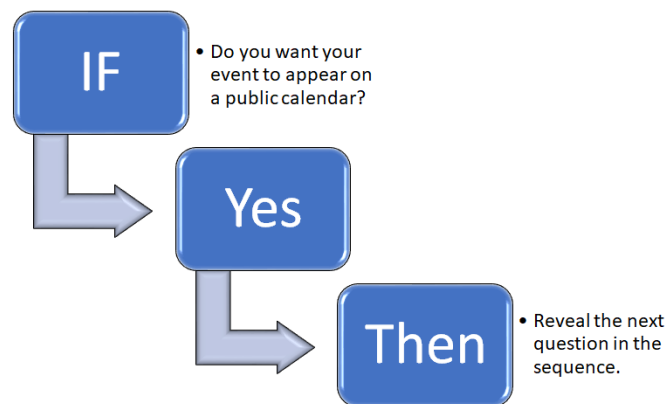
So now that you have a feeling for how this process will work, what infrastructure will you need to build?

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 ➜ Custom Attributes ➜ Event** 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.
- Modify the **Name** and **Save** your changes.
    - For this example, we'll name this attribute "Do you want this event added to a public calendar?"

Image: Once your new Custom Attribute is created, select the pencil button to edit the name.

> ℹ️ **Note: A Few Event Custom Attributes Are Generally Not Part of a 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.**
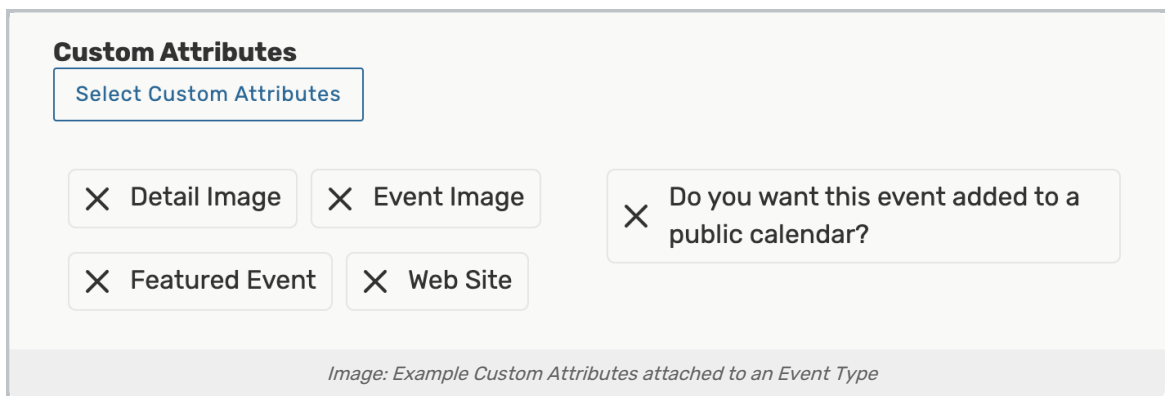
Image: Event Types List

- 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

X Detail Image   X Event Image   X Do you want this event added to a public calendar?

X Featured Event   X Web Site

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.

- **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:

- Navigate to the **System Settings → Master Definitions → Custom Attributes → Event**.
- Choose the **Boolean** data type from the dropdown menu and click the **Create** button.
- Modify the **Name**.
  - For this example, we'll name the custom attribute "Please choose a calendar from the list."
- In the **Discrete Options** column, click the **Show** button.
- Tap **Add Option** and use the text box to add a calendar that the user can choose from. Continue adding options until you provide a complete list of possible calendars. Use the up and down arrows to reorder the calendar items.
- **Save** your changes.

Image: Enter your calendar names into the Discrete Options box.

> ✅ **Tips: Asking if Users Want Their Event Added to an Additional Calendar**
>
> What if there are instances where you want to allow a requestor a second calendar for their event to populate on?
>
> 1. Create a secondary question (data type: Boolean) that asks: **Does your event need to appear on another calendar as well?**
>
> 2. Configure a **Yes** response to populate: **Please select a secondary calendar for your event.**
>
> 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.
>
> **Make sure your questions are in the right order**
>
> Use the **Sort Order** functionality in **System Settings → Master Definitions → 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.

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 Event Form 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.

	Order	ID	Name		Active	Abridged	Allow Comment	Notification Policy
⠿	1	28	Publish to a web calendar	✎	☑	☑	☑	Show
⠿	2	16	Send to Alumni Calendar	✎	☑	☑	☑	Show
⠿	3	15	Send to Athletic Calendar	✎	☑	☑	☑	Show
⠿	4	13	Send to Campus Calendar	✎	☑	☑	☑	Show
⠿	5	17	Send to Faculty Events Calendar	✎	☑	☑	☑	Show
⠿	6	14	Send to Student Events Calendar	✎	☑	☑	☑	Show

Calendar Requirements

Create New

Filter:

Save Sort

Image: Calendar Requirements.

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.

Notification Policy ✕

Approval Type

No Notification Policy ⌄

No Notification Policy

By at least one

By all

Delete   Save

Image: Requirement Notification Policies.

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

Consider requiring your users to respond to the initial calendar question by configuring the Event Form to require a response to your new custom attribute. 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):

Custom Attributes ▲
☐ Deposit Received
☐ Deposit Required
☐ Detail Image
☐ Do you agree to the catering policies?
☐ Do you have a valid certificate of insurance for …
☐ Do you want this event added to a public calen…

Image: Required Event Custom Attributes.

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.

If you are not familiar with building Event Form Rules, please see Event Form Rules Overview: Adding Conditional Rules to an Event Form

Rule - Allow User to Pick Two Calendars to Post to

If the user chooses to add their event to a specific calendar, ask them if they need to also post their event to a second calendar.

- **Operator**: and
- **Source**: Custom Attribute
  - ○ **Attribute**: Which calendar should your event appear on?
  - ○ **Operator**: in
  - ○ **Value**: Calendar 1
  - ○ **Value**: Calendar 2
  - ○ (Etc.)
- **Targets**:
  - ○ **Add Custom Attribute**s: (Optional) If you want your event added to a second calendar, please choose one from the list.

Notice that the rule relies on your calendar selection custom attribute. If the user chooses any of the listed calendar options, the rule will reveal the follow-up question, **"(Optional) If you want your event added to a second calendar, please choose one from the list."** The second custom attribute also uses multiple text options but is not a required question.

Rule - Ask User if They Want Their Event to be Featured

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).

- **Operator**: and
- **Source**: Custom Attribute
    - **Attribute**: Do you want this event added to a public calendar?
    - **Operator**: =
    - **Value**: Yes
- **Targets**:
    - **Add Custom Attributes**: Do you want event to be considered for the featured events calendar?

Rule - Set Calendar Requirements

We need to automate the process of getting the Requirements (Calendar) set with notification policies. 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 calendar and its corresponding calendar requirement.

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.

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 will automatically add the calendar requirement as shown in the image below.

- **Operator**: and
- **Source**: Custom Attribute
  - **Attribute**: Do you want this event added to a public calendar?
  - **Operator**: =
  - **Value**: Yes
- **Targets**:
  - **Add Calendar Requirement**: Publish to a web calendar

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. 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.

- **Operator**: or
- **Source**: Custom Attribute
  - **Attribute**: What calendar should your event appear on?
  - **Operator**: =
  - **Value**: Student Events Calendar
- **Source**: Custom Attribute
  - **Attribute**: (Optional) If you want your event added to a second calendar, please choose one from the list.
  - **Operator**: =
  - **Value**: Student Events Calendar
- **Targets**:
  - **Add Calendar Requirement**: Send to Student Events Calendar

You will repeat this process for each of your calendar choices.

Rule – Add a Calendar 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 example, 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.

Create New Rule

Name: Student Life Calendar

Active: No [toggle] Yes

OR ∧

Operator: or ⇕

Custom Attribute Choose a Calendar for your event: ∧

Source: Custom Attribute ⇕

Attribute: Choose a Calendar for your event: ⌄

Operator: = ⇕

Value: Student Life ⌄

Remove

Add Condition | Add Nested Condition

Targets

| Add Custom Attributes (0) ⌄ | Add Resources (1) ∧ | Add Recommended Resources (0) ⌄ |

Select Resources

Quantity

✕ Calendar – Student Life | 1

- **Operator**: or
- **Source**: Custom Attribute
  - **Attribute**: Choose a calendar for your event
  - **Operator**: =
  - **Value**: Student Life
- **Targets**:
  - **Add Resources**: Calendar - Student Life

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.

- **Operator**: or
- **Source**: Custom Attribute
  - **Attribute**: Choose a calendar for your event
  - **Operator**: =
  - **Value**: Student Life
- **Source**: Custom Attribute
  - Attribute: Choose a second calendar for your event to populate
  - Operator: =
  - Value: Student Life
- **Targets**:
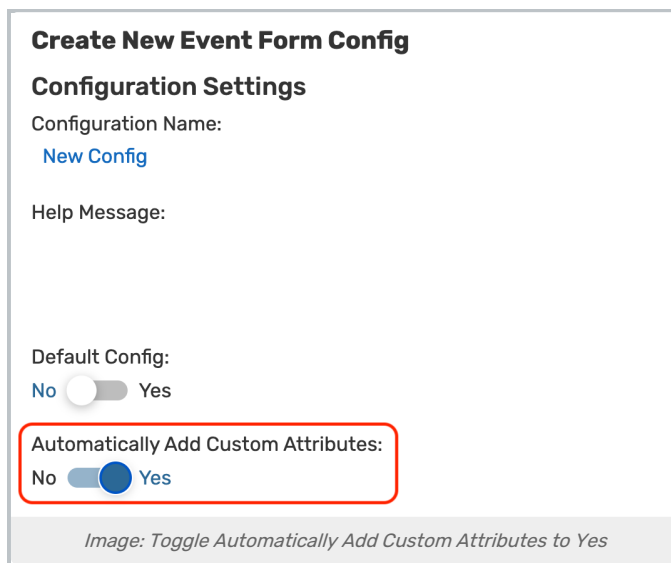 - **Add Resources**: Calendar - Student Life

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.

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 Settings → Config Settings** and select an event form.

Create New Event Form Config

Configuration Settings

Configuration Name:

New Config

Help Message:

Default Config:

No ⬤ Yes

Automatically Add Custom Attributes:

No ⬤ Yes

Image: Toggle Automatically Add Custom Attributes to 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 **Auto 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.