Building Calendars Using Event Categories or Resources

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There are two primary approaches for building major calendars, each with a process for vetting events prior to their publishing:

- Using Event Categories and Calendar Event Requirements
  OR
- Using Calendar Resources

Each approach is expanded below, along with a list of data preparation steps that must be completed prior to use. Both require access to the 25Live System Settings and Series25 Group Administration.

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Using Event Categories and Calendar Event Requirements

This is the most popular method for ensuring that events are properly vetted prior to publication. The workflow is as follows:

1. A requestor selects a "Publish to Web" Event Requirement (Calendar) in the Event Form to indicate that they want to publish their event.
2. This Event Requirement triggers a notification task for a calendar approver to review.
3. The calendar approver reviews the event and tags it with the appropriate calendar category.
4. The category is part of a 25Live event search that gets pushed to Publisher.

This method requires several steps of data preparation, which will be expanded upon in the subsections of this article.

1. Add Event Categories for Major Calendars

This approach often involves building an event category for each major campus calendar. Publisher feeds are made up of searches that can use these event categories as part of their search criteria. Since feeds are live and perpetually updated, your 25Live published calendars will be kept current with the data in 25Live.

Event categories are defined in the **Master Definitions → Categories → Events** tab of the 25Live **System Settings**. Calendar categories are typically limited to a small number of major named calendars that face a large internal or external office (e.g., Academic Calendars, Athletics Calendars, Major Events, Student Life, etc).

	Order	ID	Name		Active	Abridged	Tags
⠿	1	48	Academic Calendar	✎	☑	☐	Add
⠿	2	57	Athletics Calendar	✎	☑	☐	Add
⠿	3	94	Exhibits and Performances Calendar	✎	☑	☐	Add
⠿	4	98	Film Series Calendar	✎	☑	☐	Add
⠿	5	76	Committees Calendars	✎	☑	☐	Add

Filter: Calendar

✓ **Tip: Omitting Events From Web Calendars**

It is customary to build an event category named "Do Not Display on Web Calendars" that the 25Live Publisher user can utilize to keep specific events from being sent to web calendars (permanently or temporarily).

2. Create a Category Event Search

A typical category-based **Advanced Event Search** created for an event feed might include:

- The Cabinet where the event is saved (to differentiate courses from special events)

- An event state of "Confirmed" (to ensure that tentative events are excluded from calendars)

- A section including the category of any calendar the event will populate (select "Include Any")

- A section excluding the category of "Do Not Display on Web Calendars" (select "Do Not Include")

Query

Conjunction and

Cabinets

Select Cabinets

✕ Events

Event States

Select States

✕ Confirmed

Specific Resources

Include Any

Select Resources

✕ Calendar - Main Campus

Categories

Do Not Include

Select Categories

✕ Do Not Display on Web Calendars

Add Criterion

3. Restrict general user access to Calendar Event Categories

It is important to ensure that *only* calendar approvers and administrators have access to tether Calendar Event Categories to reservations. Giving this access to general users would sidestep the approval process and allow them to add their reservations directly to published calendars.

There are two ways to restrict general user access to Calendar Event Categories:

- Hide the **Event Categories** editor from your requestors' event form (See [Event Categories and 25Live Publisher](#)).

- Provide an abridged list of event categories to requestors. This approach lets requestors select from a limited list of event categories when creating/editing events.
  - To do this, adjust the functional level security settings for requestors. From the Group Administration tool, select the security group(s) you wish to restrict. Next, click **Configure... > Settings** and open the **Basic Options** tab. Locate rule **13.0 View all Event Master Definitions (Not Just Abridged List)** and set it to **No**.

4. Create a **Publish to Calendar** Event Requirement

The **Publish to Calendar** Event Requirement gives requestors the opportunity to indicate whether their events should be considered for publication while maintaining the data integrity of the calendar event categories. When requestors select the **Publish to Calendar** Event Requirement within the Event Form and save their events in a tentative or confirmed state, a notification task is sent to an approver to review.

> ℹ **Note**
>
> If you are only allowing your users to request events in the **Draft** state, notification policy and any assignment policy on locations or resources will not be triggered until a scheduler changes the state to either **Tentative** or **Confirmed**.

To create a new event requirement under **Master Definitions** > **Requirements** > **Calendar**, follow these directions and set the Notification Policy to the **Approval Type** of **By at least one, Approval Required**.
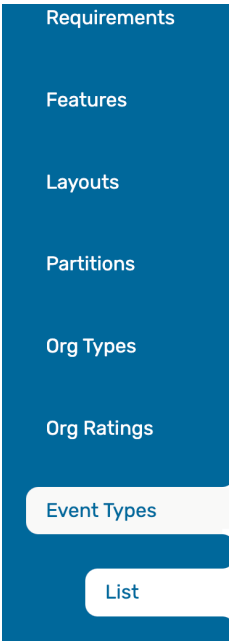
> ℹ️ **Note**
>
> Notification Policy does not function the same as Assignment Policy. For more information, please see How Security and Policy Settings Work Together.

5. Update the Relevant Event Types

- Click **Event Types → List** from the left menu of options.

- Make sure that the Event Types List toggle is set to **Event List** and click the name of the first event type you would like to modify.
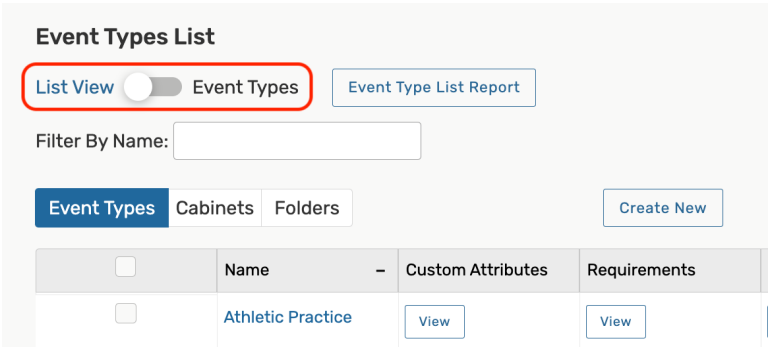
> ℹ️ **Selecting Multiple Event Types**
>
> You can select multiple event types and apply the same Publish to Calendar event requirement(s) to all of them at once. However, if certain event types are only sent to one type of calendar, you can add the event requirements to each event type separately.

- The **Edit Event Type** editing window contains all of the customizable fields for the selected event type(s). Scroll down the editor until you find the **Requirements (Publish to Calendar)** section. Click the **Select Requirements** button to add new requirements to the list.

Requirements (Publish to Calendar)

Select Requirements

   ✕ Send to Alumni Calendar   ✕ Send to Faculty Events Calendar

   ✕ Send to Athletic Calendar   ✕ Send to Student Events Calendar

   ✕ Send to Campus Calendar

- All of the event requirements (calendar) will be displayed for selection. The ones you check will populate in the Event Form when this Event Type is chosen. Click the **checkbox** next to the event requirement(s) that you want to enable and click **Done**.

✕

Requirements [   ]   ✓ Select All   ✕ Select None

  ☑ Send to Alumni Calendar   ☑ Send to Faculty Events Calendar

  ☑ Send to Athletic Calendar   ☑ Send to Student Events Calendar

  ☑ Send to Campus Calendar

Done

- **Save** your changes.

6. Update Event Forms

- Logged in as a system administrator, click the **System Settings** option in the menu.

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Reports

Publisher

System Settings

User Settings

- In System Settings, look for the **Event Form Settings** tab and click on **Config Settings** to select a custom configuration to edit.

> ℹ️ **Multiple Event Forms**
>
> The majority of campuses have set up at least two custom event forms, normally one for requestors and one for schedulers. Some campuses have more than two custom event forms. You will need to edit each event form to include the **Publish to Calendar Requirement Editor** in order for users to send a notification to a calendar gatekeeper concerning their event. Neglecting to complete this step blocks users from seeing the option to notify calendar gatekeepers of event publication needs.

- The Custom Configuration for your selected Event Form will load below. Scroll down the page until you locate the Publish to Calendar editor.

⠿ **Publish to Calendar** Display Name: ☑ Visibility Level: Editable ⬍ ☐ Auto Open Help Message
Publish to Calendar

Help Message:
To request that this event is added to a web calendar, **select the calendar(s)** where this event should be published. ☑

- On the selected card, select **Visibility Level: Editable** to make the **Publish to Calendar** editor available.
- Click the **Save** button to save the new form configuration.

With these elements built, requestors will now have the ability to check a calendar requirement when they are building their events in the event form and trigger the processes for notifying a scheduler to tag the event with the appropriate event category.

Using Calendar Resources

One of the chief complaints with the Publish to Calendar requirements' use of a Notification Policy is that notification policies inherently "lacks teeth"—meaning that where the Assignment Policy **Assign** action *actually*

results in the assignment of the location or resource to the event, the Notification Policy **Approve** action only results in a notification to interested parties. So an event can still show up on the public calendars regardless of whether that event was denied.

An alternative approach to vetting events for publication to 25Live Publisher live web calendars uses Resources. The greatest advantage to using **calendar resources** to build the major calendar feeds is that you are able to use Assignment Policy to enforce denials by users who are designated as official vetting agencies. This process requires the following steps:

1. Determining who and how many approvers you will need for your major calendar resources
2. Building functional security groups for each service provider group
3. Building the calendar resource records for each calendar
4. Setting object level security and assignment policy for each calendar resource
5. Building event searches for 25Live Publisher feeds

Copying an existing service provider security group and modifying its object security and assignment policy settings will save you some time. Best practice is to give these new security groups names that make it clear that they comprise of calendar approvers.

The **Calendar Resource** records may be named just like you would name **Calendar Event Categories**. Using the calendar event categories illustrated in the approach discussed earlier, our calendar resources would look something like the following records:

- Calendar – Academic
- Calendar – Athletics
- Calendar – Intramurals
- Calendar – Main Events
- Calendar – Student Life

When building these resources, be sure that you do not set a stock total on these resources as they should be *unlimited* resources—to be used over and over again. Setting a stock total would limit the number of events that could have each resource record applied on a single day.

To make finding all of your calendar resources easier, you will want to add a **Resource Category** to your database. Adding a **Calendars** resource category will give you a way to group all of the calendar resources together easily in a public resource search making it easier for **Requestors** to find all of the calendar resources.

To prepare resource records for 25Live Publisher live calendars, add a resource in 25. See Creating Resources. Then view the resource details and use inline editing to choose the **Calendars** category.

> ✅ **Tip**
>
> Make sure that you **do not** set a Quantity in the Inventory section on each Calendar resource.

In the Series25 Group Administration tool, set Object Security so that the majority of functional security groups can view and assign. The System Administrator and Functional Administrator will be able to edit, delete, and copy the resources and have assign/request rights. The Publisher User Account and the public search user account should also be able to view event availability.

Repeat copying and adding until you have added all of the Calendar resources you need to add.

You are now ready to begin using Resources as part of your searches for major published calendars in 25Live Publisher.

> ℹ️ **Create a Calendar Resources Public Search**
>
> To make it easier for your users to find the new Calendar resources, you will likely want to create a new public Resource search using your public search user account.
>
> | Select Object: | 🔶 Resources ⌄ | Saved Searches (optional) ⌄ |
> | --- | --- | --- |
>
> Quick Search 🔵 Advanced
>
> **Query** ⌃
>
> Conjunction [and ⬍]
>
> **Categories** ⌃ ✕
>
> [Include Any ⬍]
>
> Select Categories
>
> ✕ Calendars
>
> Add Criterion

Using Resources as the method for routing events to major published calendars relies on the Calendar resource being *assigned* to an event. It requires a slightly different search for these major calendar. Until an approver actually *approves* the use of the Calendar resource on an event, an event will not appear on the calendar using that resource in its searches.

Query ∧

Conjunction [and ⇅]

Cabinets ∧ ✕

[Select Cabinets]

✕ Events

Event States ∧ ✕

[Select States]

✕ Confirmed

Specific Resources ∧ ✕

[Include Any ⇅]

[Select Resources]

✕ Calendar - Main Campus

Categories ∧ ✕

[Do Not Include ⇅]

[Select Categories]

✕ Do Not Display on Web Calendars

[Add Criterion]