

Adding and Editing Cabinets



Security Note

Only users with appropriate permissions set can access these features. Your 25Live user must have security permissions set in [Series25 Group Administration](#):

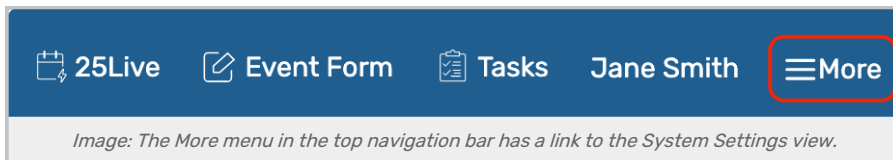
- Administrative: 5.0 *Create Cabinets and Folders* = Yes
- Administrative: 5.1 *Delete Cabinets and Folders* = Yes *(only if you would like the Delete option available)*
- Administrative: 5.2 *Manage Event Type Hierarchy* = Yes
- Administrative: 6.0 *Manage Event Master Definitions* = Yes
 - OR
 - Basic: 15.0 *View All Event Master Definitions (Not Just Abridged List)* = Yes
- Administrative: 8.0 *Set Event Object Security* = Yes

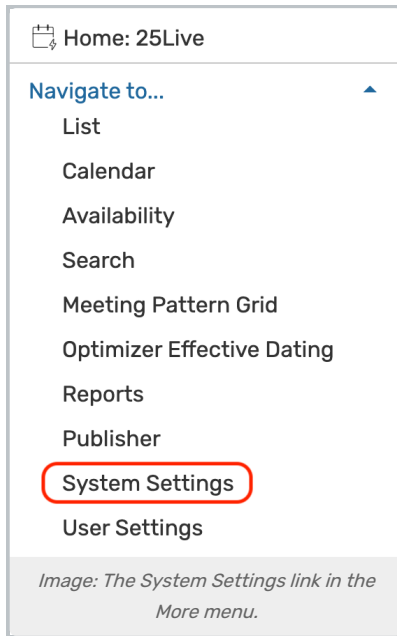
These permissions assume the user also has Administrative: 23.0 *Override Event Security* = No.

How to Access Master Definitions

1. Go to the System Settings View

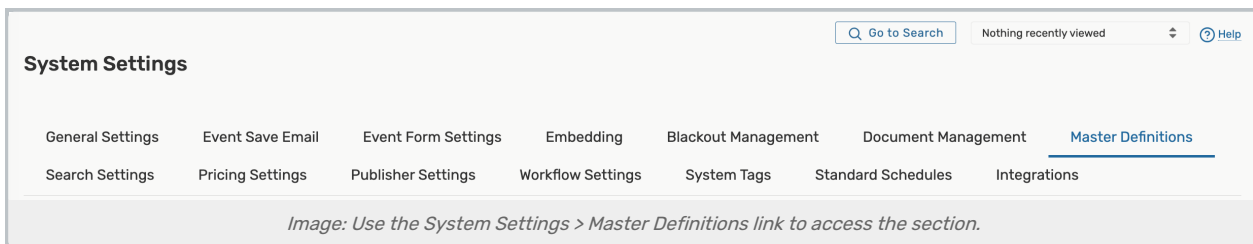
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).





2. Tap or Click the Master Definitions Link

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

Creating a New Cabinet

Before creating any new cabinets, plan for the following:

- Take the time to read about [Best Practices: Cabinets, Folders, and Event Types](#) that will explain creating a “25Live-oriented Event Structure,” especially if your institution used to use R25 as well as [Case Study: Converting an Existing R25-oriented Event Type Hierarchy to a 25Live Hierarchy](#)
- Know the appropriate date range you want to set for each cabinet. We recommend a wide date range that stretches many years into the future
- Think about the other data you'll add to each cabinet for data inheritance purposes to be sure it's correct
- Be ready to set appropriate object security on each cabinet in the [Series25 Group Administration](#) tool

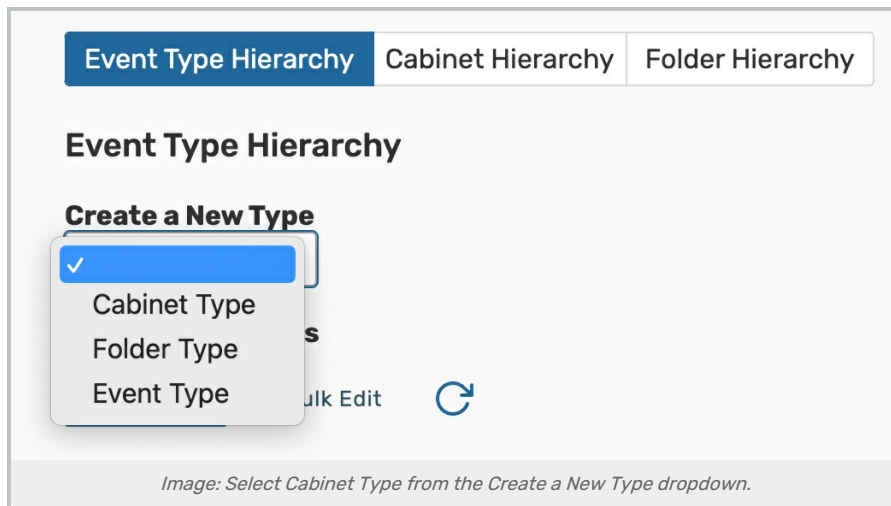
1. Go to the Hierarchy View



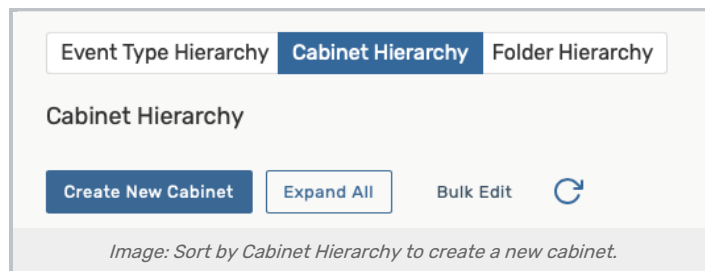
The **Event Types** subsection has two main views, List and Hierarchy. Using the **Hierarchy** view will give you a better sense of your existing structure.

2. Create the New Cabinet Type or Cabinet OR Copy From an Existing Cabinet

Create a New Cabinet or Cabinet Type



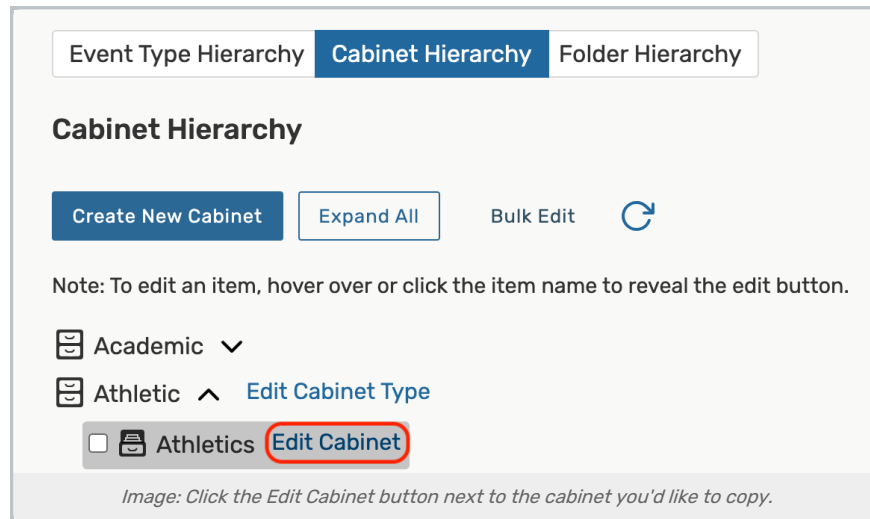
The top-level cabinet is referred to as the cabinet type. If you don't have any top cabinet types defined, you can use the **Create a New Type** dropdown menu to create a new cabinet type. Cabinet types can only have a name, with no date range options.



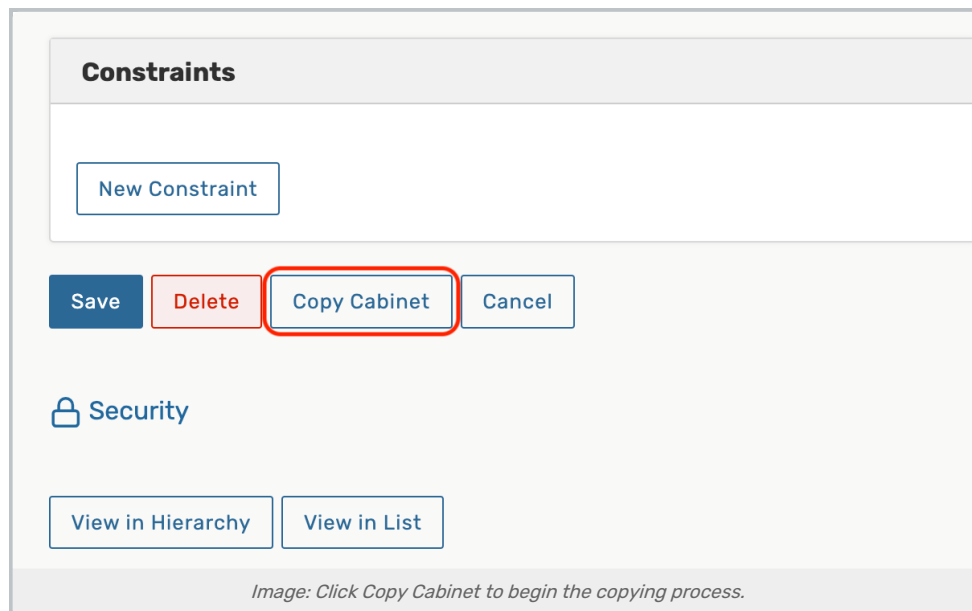
If you need to create a sub-cabinet, choose **Cabinet Hierarchy** in the **Sort By** dropdown to see your full cabinet list. You will have a **Create New Cabinet** button available to you.

Copy an Existing Cabinet

To copy an existing Cabinet, click **Edit Cabinet** next to an existing cabinet in your **Cabinet Hierarchy** list.



Scroll down to the bottom of the page and tap **Copy Cabinet**.



i Note: What will be Copied?

Copying an existing cabinet will only copy the cabinet and its configurations. It will not copy any contents of that cabinet—such as folders or events.

Categories will be copied.



Tip: Returning to Create a Cabinet Type

If you realize after sorting by the cabinet hierarchy that you need to go back to create a top-level cabinet type, use the **Sort By** dropdown again to return to an **Event Type Hierarchy** sort.


3. Complete Cabinet Details

The screenshot shows a form titled "Event Type Hierarchy" with the sub-header "New Cabinet Type". A required field "Cabinet Type Name" contains the text "type_91". Below the input field are "Save" and "Cancel" buttons. At the bottom of the form are "View in Hierarchy" and "View in List" buttons. A footer note reads: "Image: Replace the system-supplied name then save the new cabinet type."

When creating a cabinet type, only the **Cabinet Type Name** can be completed.

The screenshot shows a form titled "New Cabinet". It includes a "Cabinet Type" dropdown menu with "Select a Cabinet" selected. The "Cabinet Name" field contains "New Cabinet 55325". The "Date Range" section has "Start Date: Wed Jun 01 2022" and "End Date: Thu Jun 01 2023", both with edit icons. A "Constraints" section contains a "New Constraint" button. "Save" and "Cancel" buttons are at the bottom. A note states: "Note: Object Security can be edited in the Groups Tool." A footer note reads: "Image: Complete all required fields before saving the new cabinet."

When creating a cabinet within a cabinet type, complete the details fields, including:

- Choose the **Cabinet Type** *(required)*
- Replace the system-supplied name with your **Cabinet Name** *(required)*
-  Use the **Date Range** fields to specify the start and end dates of the cabinet's date range using the editing icon (or mouse over the fields in a desktop browser)
- Skip the **Constraints** fields if your institution is using the Series25 LYNX Interface. LYNX includes its own, more sophisticated functions for defining [date exceptions](#) that you should use instead
 - Constraints were defined and used in older interfaces. If your institution has used Series25 tools for a long time, you may be familiar with constraints, however, they are not applicable if you use the [Series25 LYNX Interface](#)
 - If you're still using the legacy Series25-SIS (TCS) Interface, use the **New Constraint** button then complete the **Name, Type**, date, and time, and repeat fields. The **X** icon in the upper-right corner of each constraint box will remove it. An **Exclude** constraint identifies dates/times when events can't occur. A **Warning** constraint allows schedulers to determine whether or not to schedule events during constraint periods
 - Then, contact your Account Manager about upgrading to the [Series25 LYNX Interface](#)

4. Save Your New Cabinet Type or Cabinet

Use the **Save** button to save your new cabinet type or cabinet. The **Cancel** button will discard your changes.

Editing Cabinets



Note: You Can't Edit the Cabinet Type Field

If you're editing a cabinet within a cabinet type, you can't edit the cabinet type field. However, you can use the link on a top-level cabinet type's name to rename the cabinet type and then use the **Save** button.

1. Use the Hierarchy View to Find the Cabinet

Open the **Hierarchy** view to see your existing structure, then choose **Cabinet Hierarchy** in the **Sort By** dropdown to get a more complete view of cabinets.

2. Choose the Cabinet and Edit Its Details

Cabinet Hierarchy

Edit Cabinet

Cabinet Name - *Required*

Cabinet Type
Academic

Date Range

Start Date: End Date:

Categories

Constraints ^

Image: Edit any fields needed then save your changes.

Tap or click on the name of the cabinet, then edit any of the details fields.

3. Save Your Changes

At the bottom of the Edit Cabinet view, you can **Save** your changes or **Cancel** to discard changes.

A Delete button is also available. See the "Deleting a Cabinet" section below.

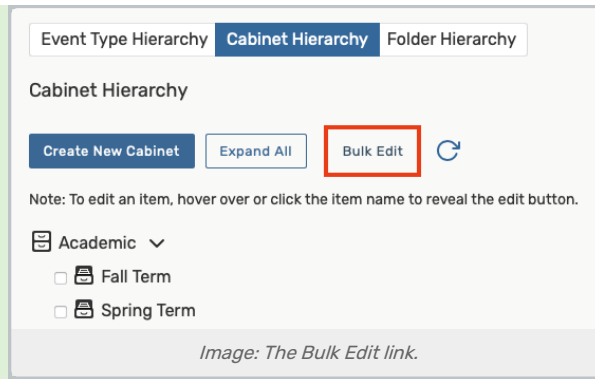
Bulk Editing Cabinets

1. Use the List View to Find the Cabinets

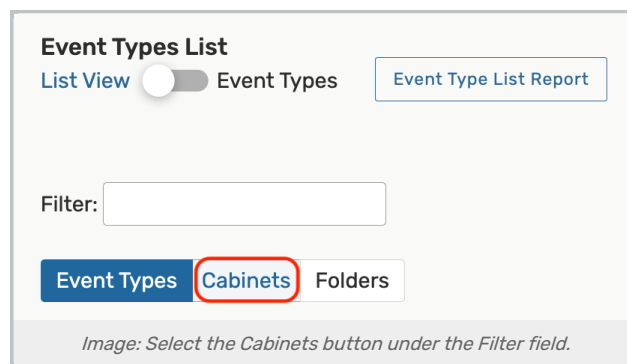
Set to **List View**. Then set the **Sort By** dropdown to **Cabinets**.



Tip: Bulk Editing in Hierarchy View

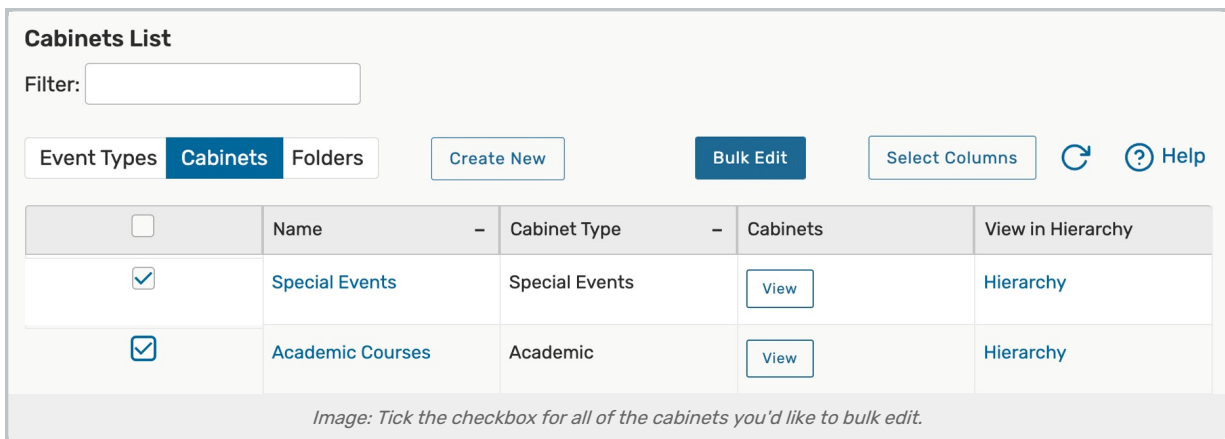


Bulk editing is also available in the Hierarchy view, but starting with the list view is often simpler.



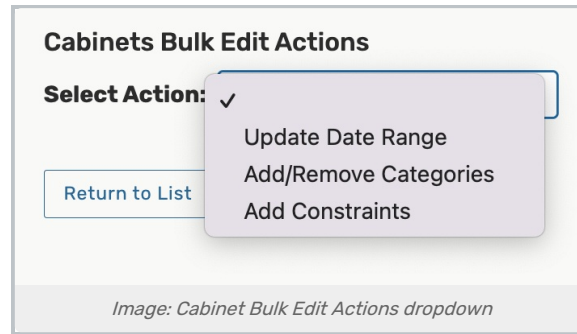
2. Choose Your Cabinets From the List

Tick the checkboxes for each cabinet that you'd like to edit. Then, click **Bulk Edit**.



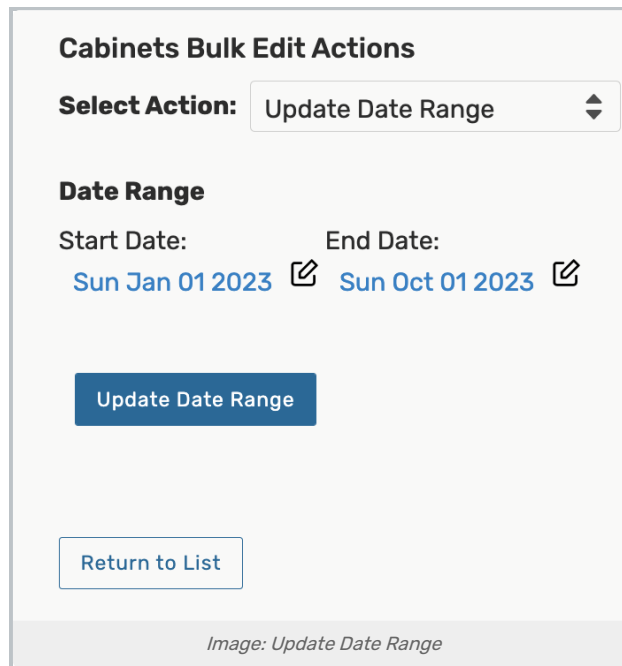
3. Make Your Bulk Edits

Make a selection using the Select Action dropdown



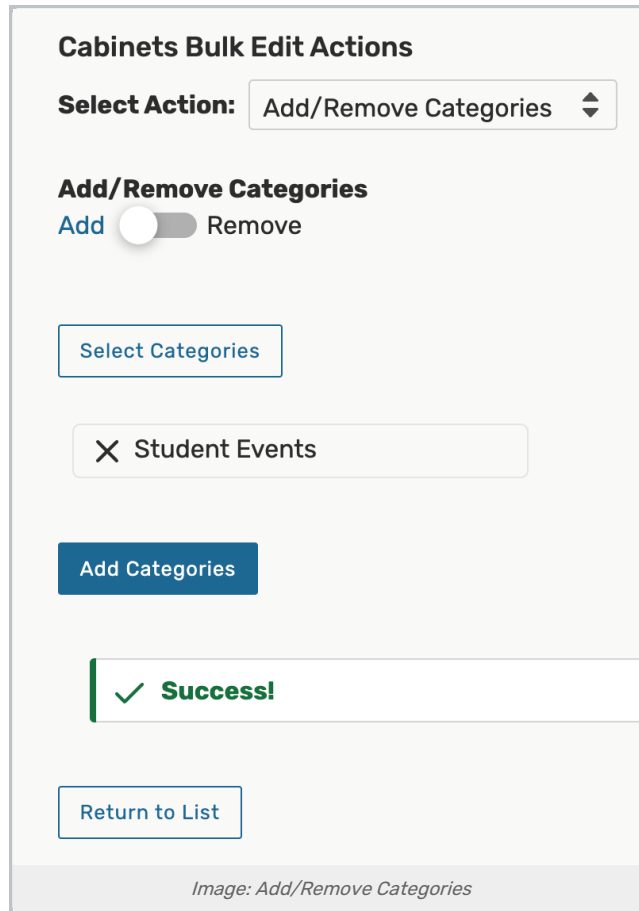
Update Date Range

- Select a **Start Date** and **End Date**
- Click **Update Date Range**



Add/Remove Categories

- Toggle to **Add** or **Remove**
- Check the categories you'd like to add or remove in the **Select Categories** menu
 - Click **Done**
- Click **Add/Delete Categories** to save your changes



Add Constraints



Warning

Constraints aren't necessary if your institution is using the Series25 LYNX Interface. LYNX includes its own, more sophisticated functions for defining [date exceptions](#) that should be used instead

- Click **Add Constraint**
- Enter a **Name**
- Choose a constraint **Type**:
 - **Exclude** - identifies dates/times when events can't occur
 - **Warning** - allows schedulers to determine whether or not to schedule events during constraint periods
- Choose a start date and time
 - Unchecking the **This begins and ends on the same day** box will allow you to choose an end date
- Choose a repeat pattern:
 - **Does Not Repeat**
 - **Ad Hoc**

- Daily
- Weekly
- Monthly

Cabinets Bulk Edit Actions

Select Action: Add Constraints

Name **Type** Exclude

Sat Dec 31 2022

12:00 am

To:

11:59 pm

This begins and ends on the same day

Choose how you would like this to repeat: Does Not Repeat

New Constraint

Save

Image: Add Constraints

Deactivating a Cabinet Type

Deactivating a cabinet type, folder type, or event type means that new cabinets, folders, or events can no longer have that type.



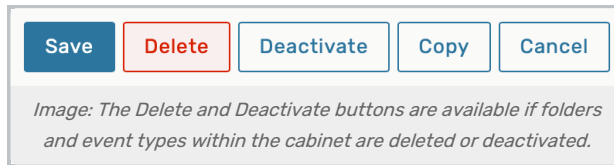
Note: The Type Must Not Be In Use

To deactivate a cabinet type, you must first deactivate the folder types and event types within it.

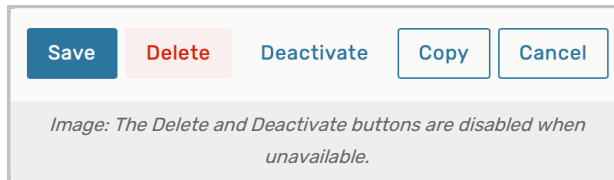
1. Access the Cabinet Type

Use the **Hierarchy** view to see your existing structure. Choose **Cabinet Hierarchy** in the **Sort By** dropdown to see your full cabinet list. Tap or click on the name of any top-level cabinet type to enter its editing view.

2. Deactivate, if Available

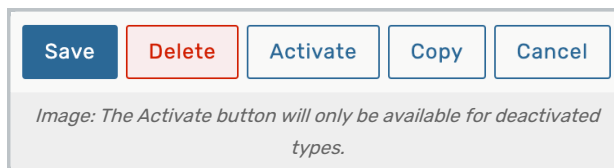


If all the folder types and event types within this cabinet type are deactivated or deleted, the **Deactivate** button will be available.



If the action isn't available, the Deactivate button will be disabled without an outline.

Once deactivated, the button will be replaced with the **Activate** button. Pressing Activate will reverse the deactivation.



Deleting a Cabinet Type or Cabinet

Access the Cabinet Type or Cabinet Edit View

Open the **Hierarchy** view to see your existing structure, then choose **Cabinet Hierarchy** in the **Sort By** dropdown to get a more complete view of cabinets.

If Deleting a Cabinet Type

Use the link on a top-level cabinet type's name to rename the type then use the **Delete** button. This action is permanent and should be considered carefully.

You can't delete a cabinet type once actual folders or events using that type are created. If there are still folders and event types within it, the Delete button will be disabled without an outline.

If Deleting a Cabinet

Use the **Delete** button at the bottom of the editing view. This action is permanent and should be considered carefully.



Warning: Make Sure the Cabinet Is Not In Use

Use the **Folder Hierarchy** option in the **Sort By** dropdown menu of the Hierarchy view to expand your whole structure and be sure no folders are being used in a cabinet before deleting.