

Adding and Editing Folders



Security Note

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

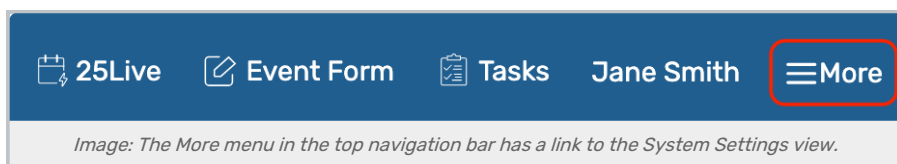
- Administrative: 5.0 *Create Cabinets and Folders* = Yes
- Administrative: 5.1 *Delete Cabinets and Folders* = Yes *(only if you would like the Delete option available)*
- Administrative: 5.2 *Manage Event Type Hierarchy* = Yes
- Administrative: 6.0 *Manage Event Master Definitions* = Yes
 - *OR*
 -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

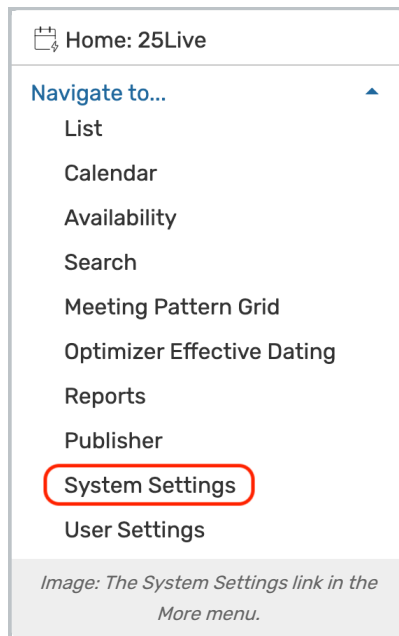
These permissions assume the user also has Administrative: 23.0 *Override Event Security* = No.

How to Access Master Definitions

1. Go to the System Settings View

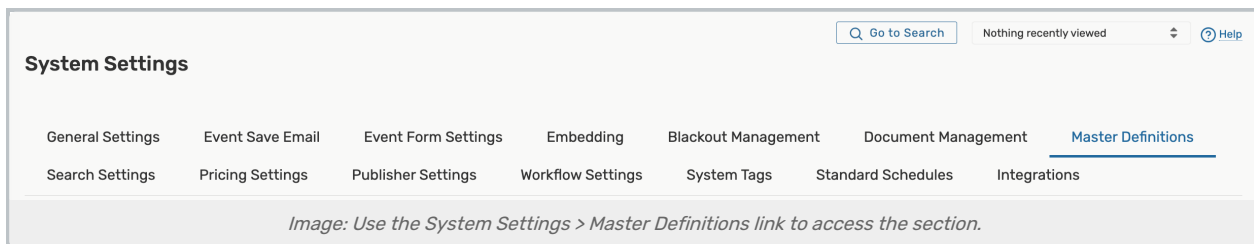
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).





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 Folder

Before creating any new folders, plan for the following:

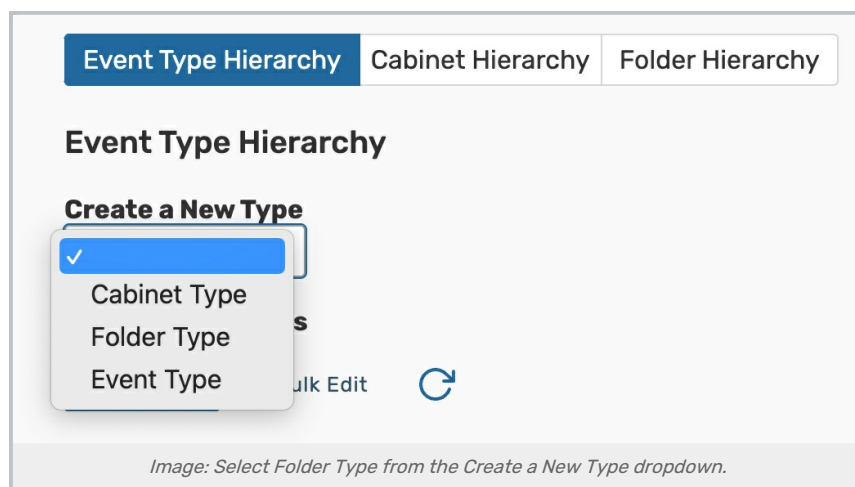
- Consider reading [Best Practices: Cabinets, Folders, and Event Types](#)
- Know the appropriate date range you want to set for each folder. We recommend a wide date range that stretches many years into the future
- Think about the other data you'll add to each folder for data inheritance purposes to be sure it's correct
- Be ready to set appropriate object security on each folder in the [Series25 Group Administration](#) tool

1. Go to the Hierarchy View



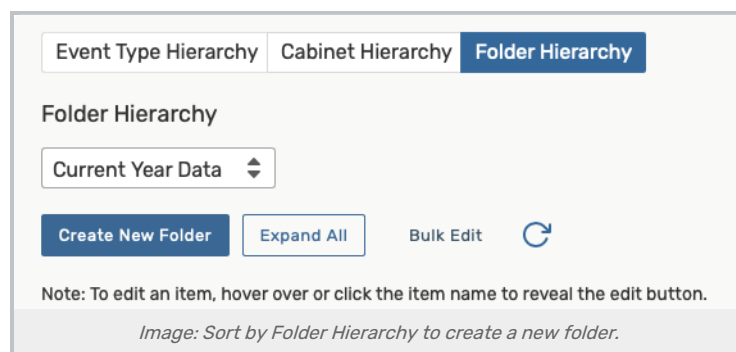
The Event Types subsection has two main views, List and Hierarchy. Using the **Hierarchy** view will give you a better sense of your existing structure.

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



Create a New Folder or Folder Type

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



If you need to create a folder, choose **Folder Hierarchy** in the **Sort By** dropdown to see your full structure list. You will

have a **Create New Folder** button available to you.

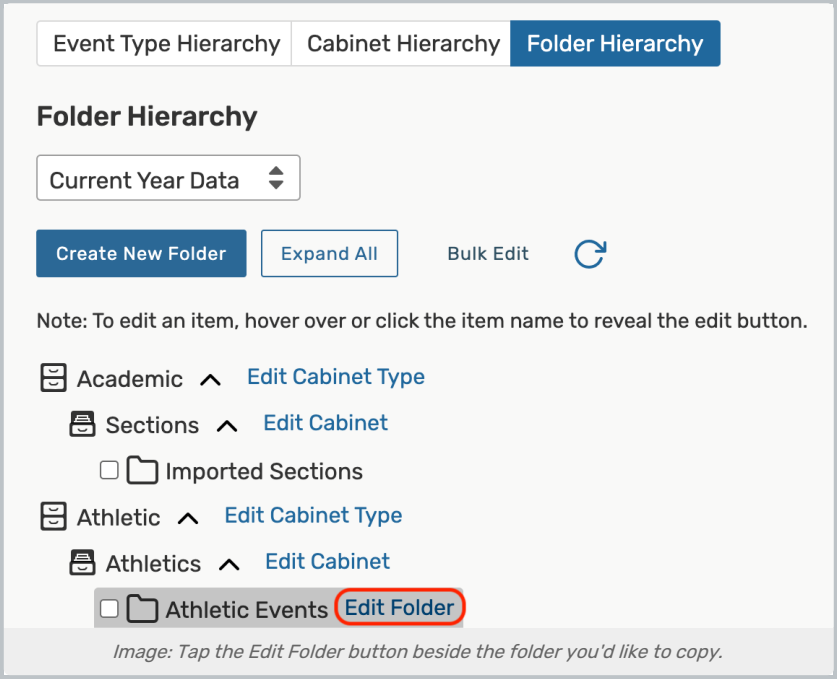


Tip: Returning to Create a Folder Type

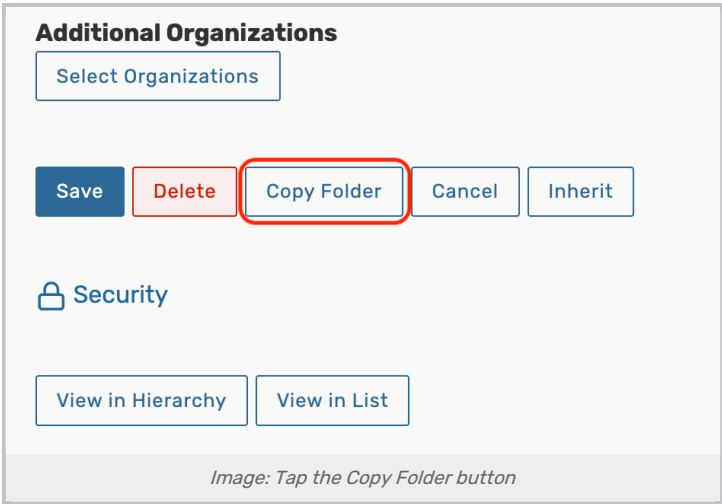
If you realize after sorting by the folder hierarchy that you need to go back to create a top-level folder type, use the **Sort By** dropdown again to return to an **Event Type Hierarchy** sort.

Copy an Existing Folder

To copy an existing folder, click **Edit Folder** next to an existing folder in your **Folder Hierarchy** list.



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



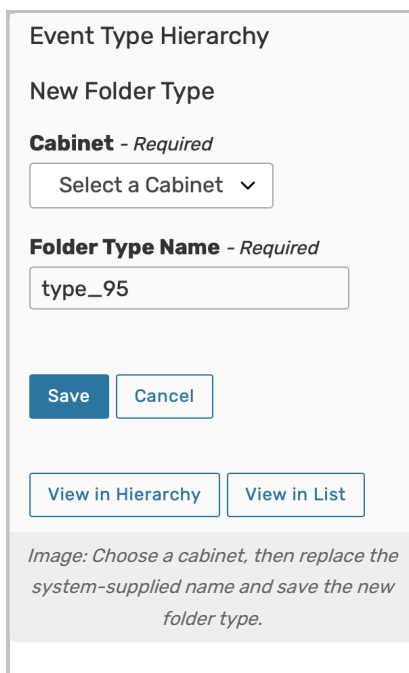
Note: What will be copied?

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

Organizations will be copied.

Categories will not be copied.

3. Complete Folder Details



The screenshot shows a dialog box titled "Event Type Hierarchy". Inside, there is a section "New Folder Type". Under this section, there is a label "Cabinet - Required" followed by a dropdown menu with the text "Select a Cabinet" and a downward arrow. Below that is a label "Folder Type Name - Required" followed by a text input field containing the text "type_95". At the bottom of the form area, there are two buttons: "Save" (in blue) and "Cancel". Below the buttons, there are two more buttons: "View in Hierarchy" and "View in List". At the very bottom of the dialog, there is a note: "Image: Choose a cabinet, then replace the system-supplied name and save the new folder type."

When creating a folder type, you can complete:

- **Cabinet** the folder will be within *(required)*
- Replace the system-supplied **Folder Type Name** *(required)*

New Folder
Cabinet Type- Required

Athletic

Cabinet Name- Required

Athletics

Sub Folder - Optional

Select an item

Folder Type- Required

Select an item

Image: Complete all required fields before saving.

When creating a folder, complete the details fields, including:

- Select the **Cabinet Type** *(required)*
- Choose the **Cabinet Name** *(required)*
- Optionally select a **Sub Folder**
- Choose the **Folder Type** *(required)*

Folder Name - Required


New Folder 55334

Description

File Insert Table View Format Tools

↶ ↷

B *I* U

A ▼  ▼

System Font ▼ 12pt ▼




Image: Additional folder details.

- Replace the system-supplied name with your Folder **Name** *(required)*
- Complete the **Description** textarea
 - Rich text formatting controls are available




Date Range

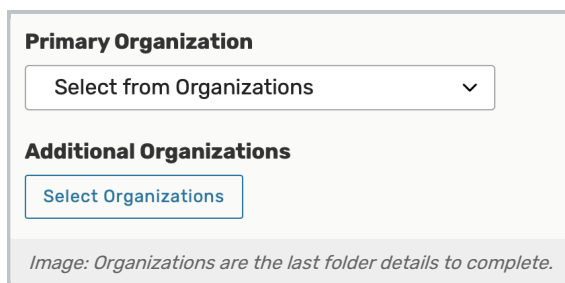
Start Date: Wed Jun 01 2022  End Date: Thu Jun 20 2030 

Constraints 


[New Constraint](#)

Image: Enter a wide date range far in the future, then skip Constraints if using LYNX.

-  Use the **Date Range** fields to specify the start and end dates of the folder's date range using the editing icon (or mouse over the fields in a desktop browser)
- You may wish to skip the **Constraints** fields if your institution is using the Series25 LYNX Interface. LYNX includes its own functions for defining [date exceptions](#) that you should use instead
 - Constraints were defined and used in older interfaces.
 - 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](#)



Primary Organization

Select from Organizations 

Additional Organizations

[Select Organizations](#)

Image: Organizations are the last folder details to complete.

- Select a **Primary Organization** by opening the search
- Optionally add any **Additional Organizations** using the **Select Organizations** button to search and filter. Save choices with the **Done** button

4. Save Your New Folder Type or Folder

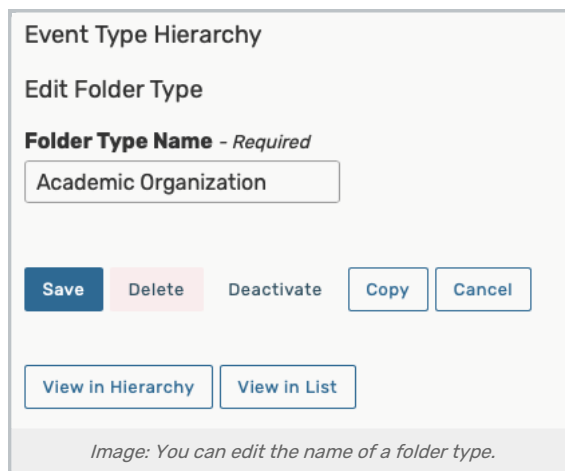
Use the **Save** button to save your new folder type or folder. The **Cancel** button will discard your changes.

Editing Folders

1. Use the Hierarchy View to Find the Folder

Open the **Hierarchy** view to see your existing structure, then choose Folder **Hierarchy** in the **Sort By** dropdown to get a more complete view of folders (optionally **Expand All**).

2. Choose the Folder and Edit Its Details



Event Type Hierarchy

Edit Folder Type

Folder Type Name - Required

Academic Organization

Save Delete Deactivate Copy Cancel

View in Hierarchy View in List

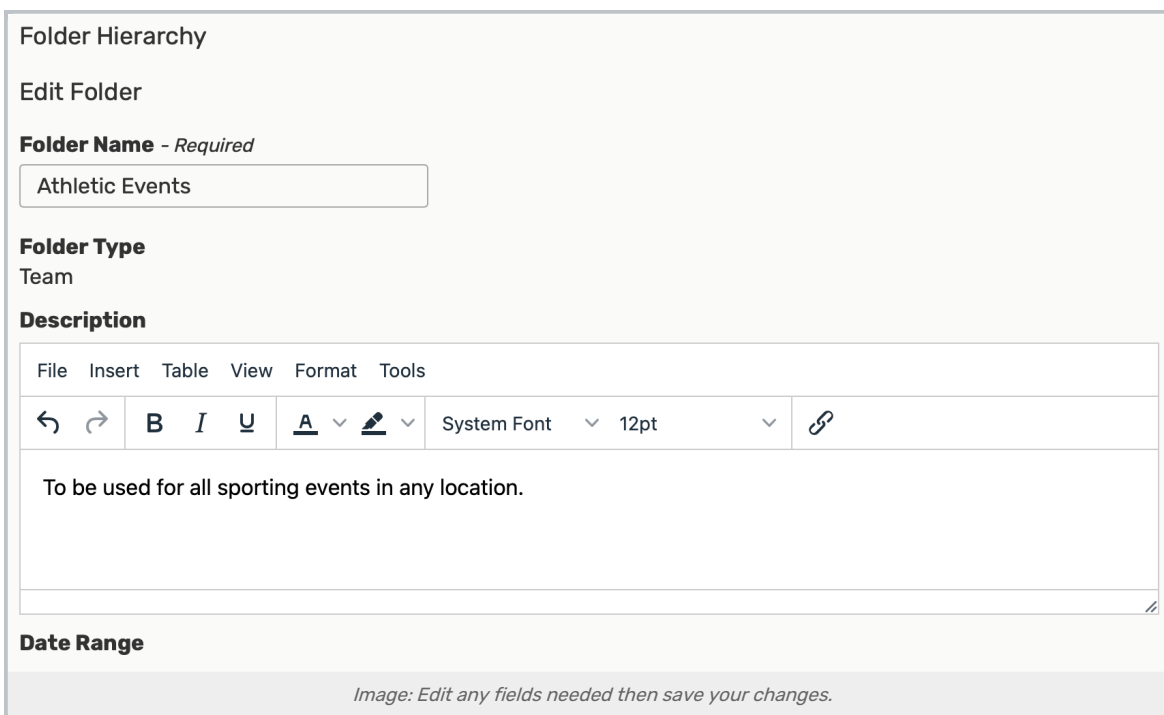
Image: You can edit the name of a folder type.

If editing a folder type, you can rename it, then use the **Save** button.



Tip: If You Can't Find a Folder Type

If you can't find the folder type you wish to edit, try sorting by different elements in the hierarchy view, such as sorting by the Event Type Hierarchy option.



Folder Hierarchy

Edit Folder

Folder Name - Required

Athletic Events

Folder Type

Team

Description

File Insert Table View Format Tools

↩ ↪ B I U A System Font 12pt

To be used for all sporting events in any location.

Date Range

Image: Edit any fields needed then save your changes.

Tap or click on the name of the folder, then edit any of the details fields that are available.

Categories are available when editing a folder.

3. Save Your Changes

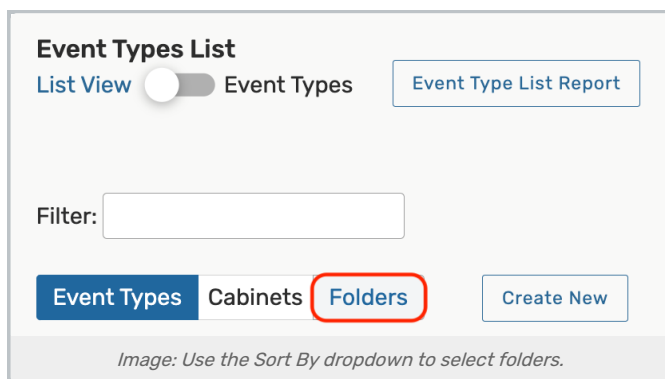
At the bottom of the Edit Folder view, you can **Save** your changes or **Cancel** to discard changes.

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

Bulk Editing Folders

1. Use the List View to Find the Folders

Make sure that the toggle is set to **List View**. Then set the **Sort By** dropdown to Folders.



Event Types List

List View ☒ Event Types [Event Type List Report](#)

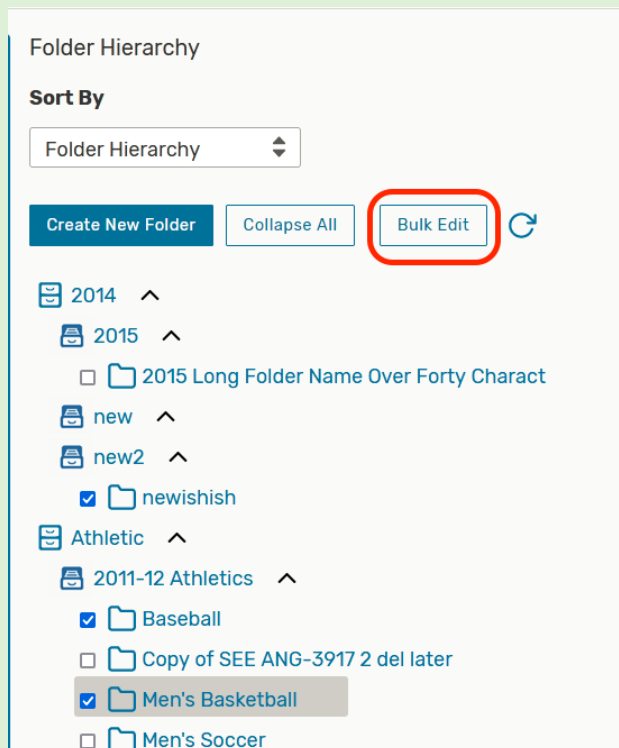
Filter:

[Event Types](#) [Cabinets](#) [Folders](#) [Create New](#)

Image: Use the Sort By dropdown to select folders.



Tip: Bulk Editing in Hierarchy View



Folder Hierarchy

Sort By

Folder Hierarchy

[Create New Folder](#) [Collapse All](#) [Bulk Edit](#)

- ☒ 2014 ^
- ☒ 2015 ^
 - ☐ 2015 Long Folder Name Over Forty Charact
- ☒ new ^
- ☒ new2 ^
- ☒ newishish
- ☒ Athletic ^
 - ☒ 2011-12 Athletics ^
 - ☒ Baseball
 - ☐ Copy of SEE ANG-3917 2 del later
 - ☒ Men's Basketball
 - ☐ Men's Soccer

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

2. Choose Your Folders From the List

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

Folders List

Filter By Name: Filter By History: Current Year Data ▼

Event Types
Cabinets
Folders
Create New
Bulk Edit
Select Columns
↻
?
Help

<input type="checkbox"/>	Name	Folder Type	Parent Cabinet	Folders	Primary Organization	Start Date	End Date	Copy	View in Hierarchy
<input checked="" type="checkbox"/>	Athletic Events	Athletics - New	Athletics	View		Mon Sep 01 2014	Sat Jan 01 2050	Copy	Hierarchy
<input checked="" type="checkbox"/>	Events	Group	Events	View		Thu Jan 01 2015	Sat Jan 01 2050	Copy	Hierarchy
<input type="checkbox"/>	Imported Sections	Academic Organization	Sections	View		Wed Dec 31 2014	Sun Jun 12 2050	Copy	Hierarchy

Image: Tick two or more checkboxes for each of the folders you'd like to bulk edit.

3. Make Your Bulk Edits

Make a selection using the Select Action dropdown

Folder Bulk Edit Actions

Select Action: ✓

[Return to Hierarchy](#)

- Update Date Range
- Add/Remove Categories
- Add Constraints
- Edit Primary Organization
- Add/Remove Additional Organization
- Inherit Folders
- Copy Folders

Image: Folder Bulk Edit Actions dropdown.

Update Date Range

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

Folders Bulk Edit Actions
Select Action: Update Date Range
Date Range
Start Date: Sat Oct 01 2022 End Date: Sun Oct 01 2023

Update Date Range

Image: 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

Folders Bulk Edit Actions

Select Action: Add/Remove Categories

Add/Remove Categories

Add ☒ Remove

Select Categories

✕ Student Events

Add Categories

✓ **Success!**

Return to List

Image: Add/Remove Categories

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

Folders Bulk Edit Actions

Select Action: Add Constraints

Name **Type** Exclude

Sat Oct 01 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

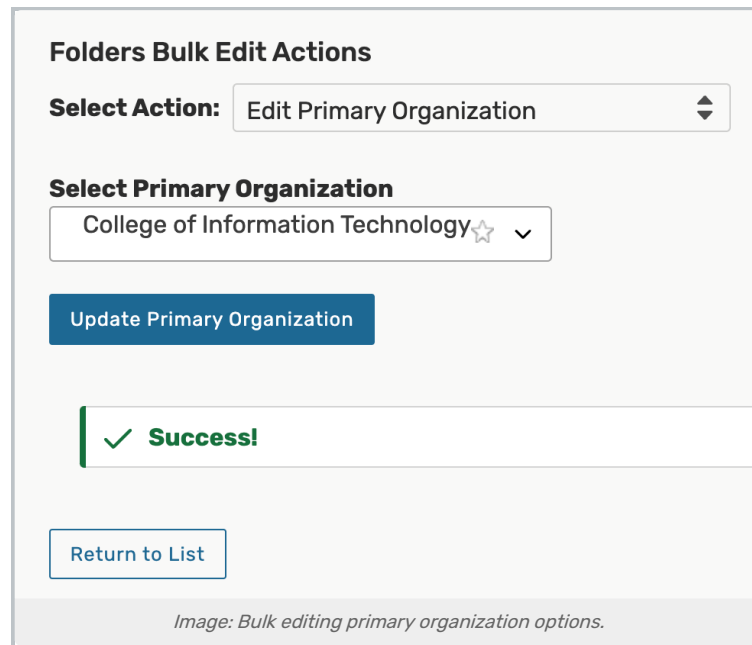
New Constraint

Save

Image: Add Constraints

Edit Primary Organization

- Select an organization using the **Select Primary Organization** dropdown
- Click the **Update Primary Organization** button to save your changes



Folders Bulk Edit Actions

Select Action: Edit Primary Organization

Select Primary Organization

College of Information Technology ☆ ▼

Update Primary Organization

✓ **Success!**

Return to List

Image: Bulk editing primary organization options.

Add/Remove Additional Organization

- Toggle to **Add** or **Remove** organizations
- Check the organizations you'd like to add or remove in the **Select Organizations** dropdown menu
 - Click **Done**
- Click **Add/Remove Additional Organization** to save your changes

Folders Bulk Edit Actions

Select Action: Add/Remove Additional Organization

Add/Remove Additional Organization
Add ☒ Remove

Select Organizations

X STUDENT AFFAIRS

X STUDENT CENTER

Add Additional Organization

✓ Success!

Return to List

Image: Bulk editing additional organizations options.

Inherit Folders

Folders Bulk Edit Actions

Select Action: Inherit Folders

Please confirm that you want to inherit data from this folder's parent:
ACCT
ACCT
ACCT

Inherit data to folder

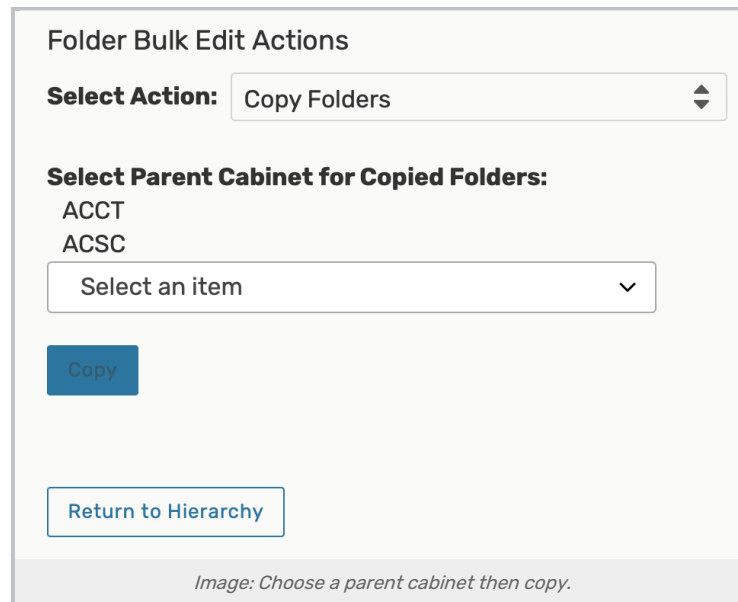
Return to List

Image: You will be asked to confirm that you want to inherit the data.

- Check the displayed information to be sure it's correct
- Use the **Inherit data to folder** button

See "Inheriting Folder Details" below for more details.

Copy Folders



Folder Bulk Edit Actions

Select Action: Copy Folders

Select Parent Cabinet for Copied Folders:

ACCT
ACSC

Select an item

Copy

Return to Hierarchy

Image: Choose a parent cabinet then copy.

- The **Select Parent Cabinet for Copied Folders** dropdown allows you to choose a parent cabinet
- Use the **Copy** button when its text is white indicating its available



Note: What will be Copied?

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

Organizations will be copied.

Categories will not be copied.

Inheriting Folder Details

A quick way to ensure that all your folders have the correct date range is to verify the range on the parent cabinet, then edit the folder. When editing a folder, an **Inherit** button is available at the bottom of the view (by the Save button). You will be asked to confirm by answering, "Are you sure want to Inherit this folder's parent?" Then a final confirmation will display before returning you to a previous view.

Deactivating a Folder Type

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



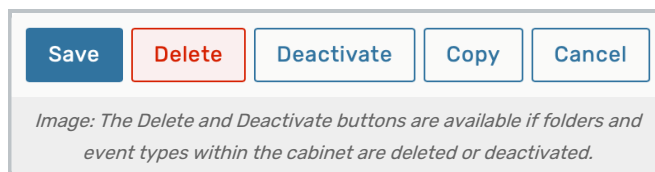
Note: The Type Must Not Be In Use

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

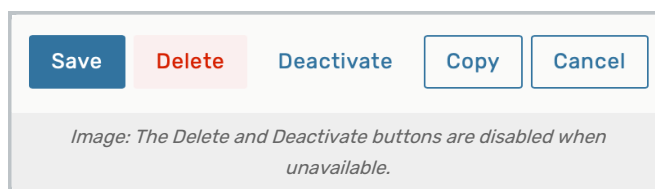
1. Access the Folder Type

Use the **Hierarchy** view to see your existing structure. Choose **Event Type Hierarchy** in the **Sort By** dropdown to see your full list. Tap or click on the name of any folder type to enter its editing view.

2. Deactivate, if Available



If all the event types within this folder 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 Folder Type or Folder

Access the Folder Type or Folder Edit View

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

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



Warning: Make Sure the Folder Is Not In Use

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