

## 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](#):

- Admin: 5.0 *Create Cabinets and Folders* = Yes
- Admin: 5.1 *Delete Cabinets and Folders* = Yes *(only if you would like the Delete option available)*
- Admin: 5.2 *Manage Event Type Hierarchy* = Yes
- Admin: 6.0 *Manage Event Master Definitions* = Yes
  - OR
  - Basic: 13.0 *View All Event Master Definitions (Not Just Abridged List)* = Yes
- Admin: 8.0 *Set Event Object Security* = Yes

These permission assume the user also has Admin: 20.0 *Override Location Security* = No.

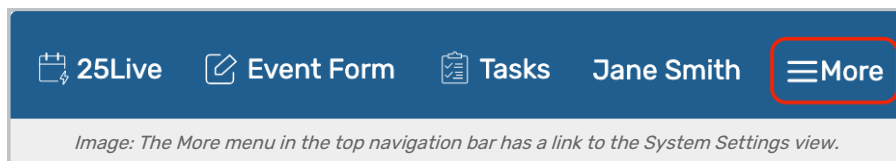
### In This Article:

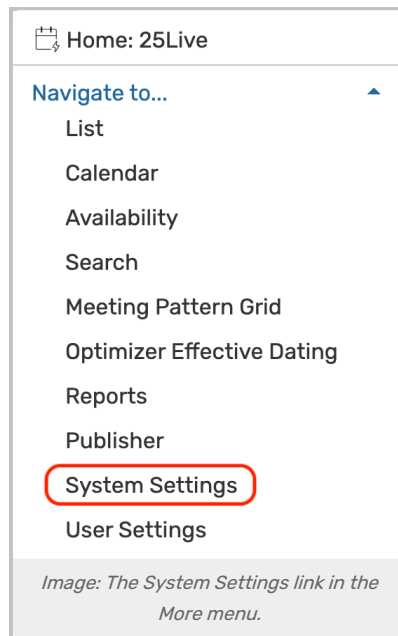
- [How to Access Master Definitions](#)
- [Creating a New Folder](#)
- [Editing Folders](#)
- [Bulk Editing Folders](#)
- [Inheriting Folder Details](#)
- [Deactivating a Folder Type](#)
- [Deleting a Folder Type or Folder](#)

## How to Access Master Definitions

### 1. Go to the System Settings View

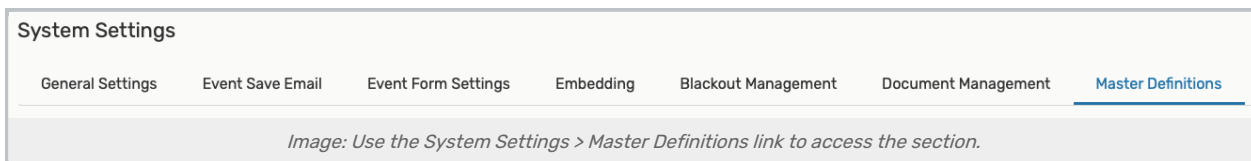
The **System Settings** section is accessible from the **More** menu in [the top navigation bar](#).





## 2. Tap or Click the Master Definitions Link

Use the menu link to go to the **System Settings** view, then view the **Master Definitions** section.



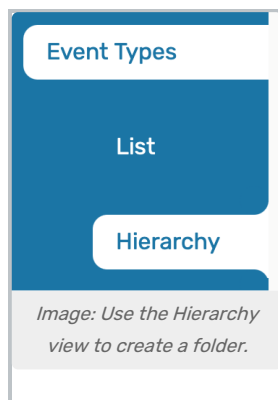
See [Working With Master Definitions](#) for details on general navigation within the Master Definitions section and actions available to all types.

## Creating a New Folder

Before creating any new folders, plan for the following:

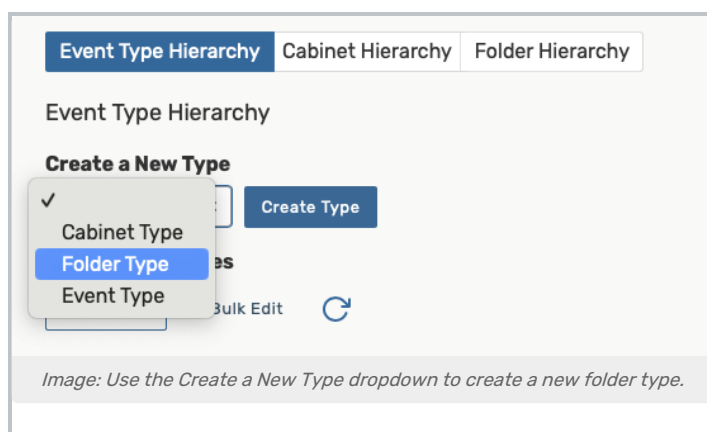
- Consider reading [Best Practices: Cabinets, Folders, and Event Types](#)
- Know the appropriate date range you want to set for each folder. We recommend a wide date range that stretches many years into the future
- Think about the other data you'll add to each folder for data inheritance purposes to 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



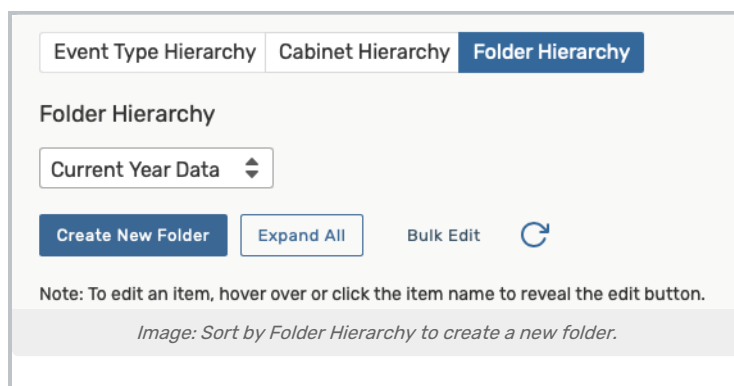
The Event Types subsection has two main views, List and Hierarchy. Using the **Hierarchy** view will give you a better sense of your existing structure.

## 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 and then the **Create Type** button 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.

Event Type HierarchyCabinet HierarchyFolder Hierarchy

Folder Hierarchy

Current Year Data

Create New FolderExpand AllBulk Edit

Note: To edit an item, hover over or click the item name to reveal the edit button.

Academic

Sections

Imported Sections

Athletic

Athletics

Athletic Events

Edit Cabinet Type

Edit Cabinet

Edit Folder

Image: Tap the Edit Folder button beside the folder you'd like to copy.

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

Additional Organizations

Select Organizations

SaveDeleteCopy FolderCancelInherit

Security

View in HierarchyView in List

Image: Tap the Copy Folder button



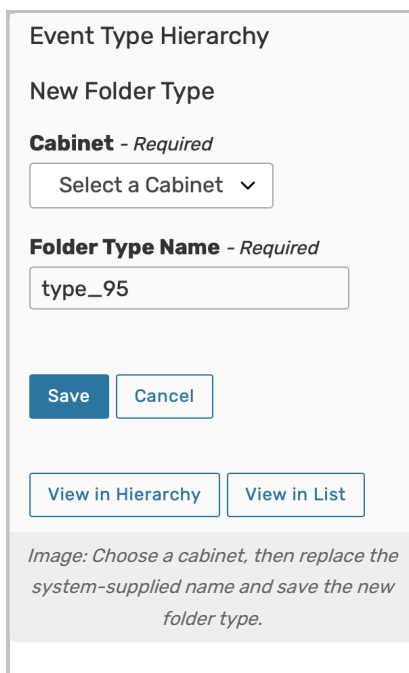
**Note: What will be copied?**

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

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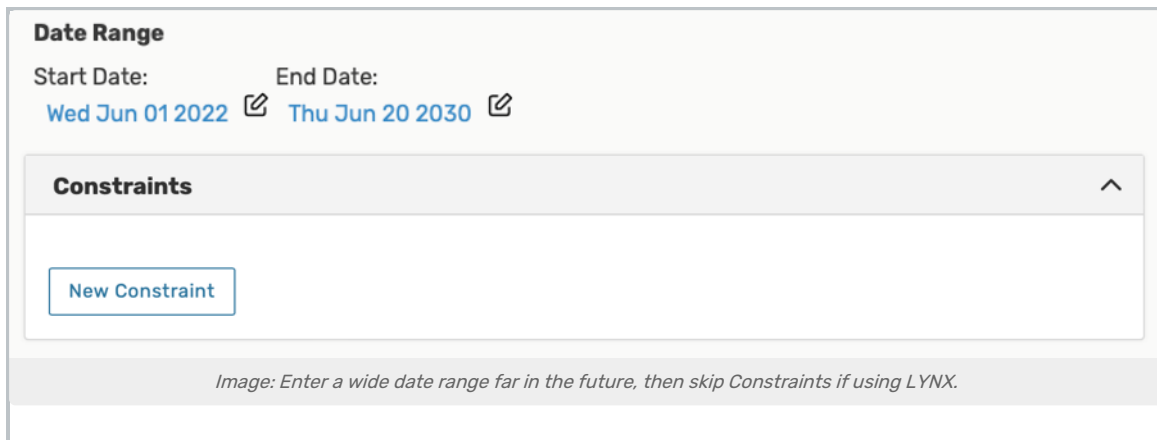
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*Image: Additional folder details.*

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




**Date Range**

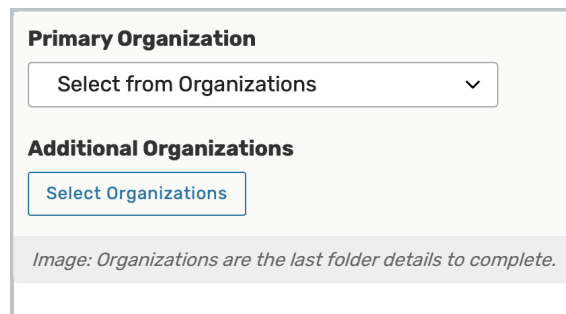
Start Date: Wed Jun 01 2022  End Date: Thu Jun 20 2030 

**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)*
- 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](#)



**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

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🔗

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

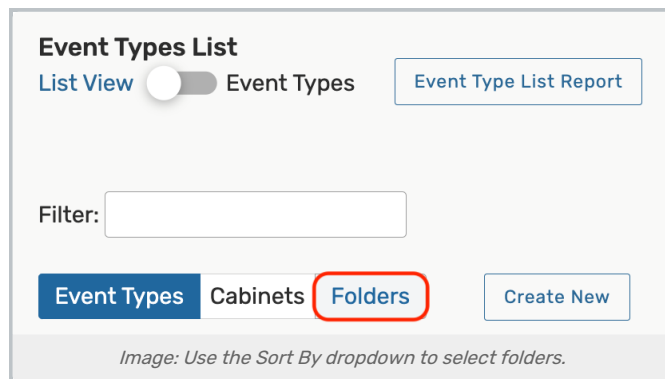
At the bottom of the Edit Folder view, you can **Save** your changes or **Cancel** to discard changes.

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

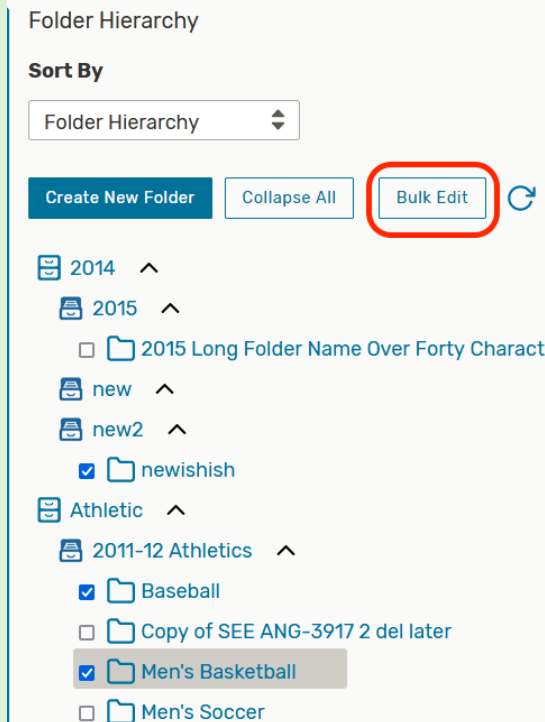
Make sure that the toggle is set to **List View**. Then set the **Sort By** dropdown to Folders.



The screenshot shows the 'Event Types List' interface. At the top, there is a toggle switch for 'List View' (which is currently turned on) and a button labeled 'Event Type List Report'. Below this is a 'Filter:' input field. At the bottom, there are three buttons: 'Event Types', 'Cabinets', and 'Folders'. The 'Folders' button is highlighted with a red rectangle. To the right of these buttons is a 'Create New' button. Below the buttons, there is a caption: 'Image: Use the Sort By dropdown to select folders.'



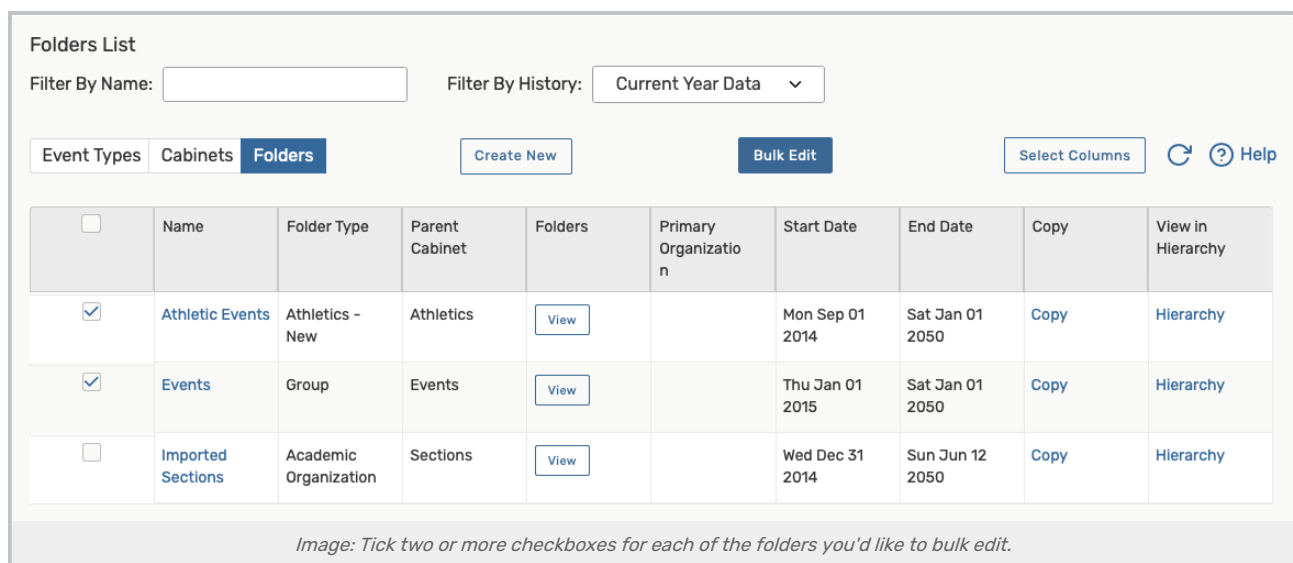
**Tip: Bulk Editing in Hierarchy View**



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

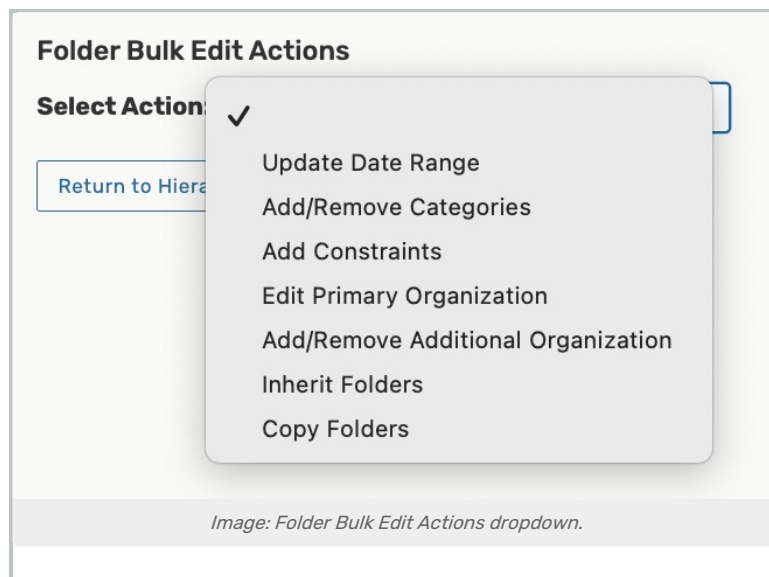
## 2. Choose Your Folders From the List

Tick the checkboxes for each folder 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**

A screenshot of the 'Folders Bulk Edit Actions' form. The 'Select Action:' dropdown is set to 'Update Date Range'. Below this, the 'Date Range' section has 'Start Date:' and 'End Date:' labels. The start date is 'Sat Oct 01 2022' and the end date is 'Sun Oct 01 2023', both with edit icons. At the bottom is a blue 'Update Date Range' button.

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

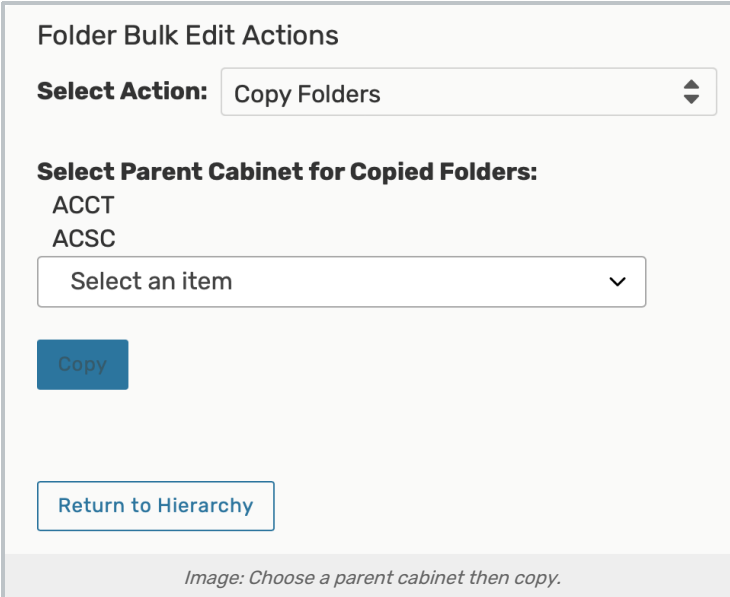
Return to List

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

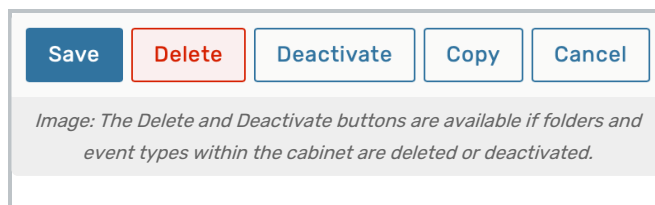
To deactivate a folder type, you must first deactivate the event types within it.



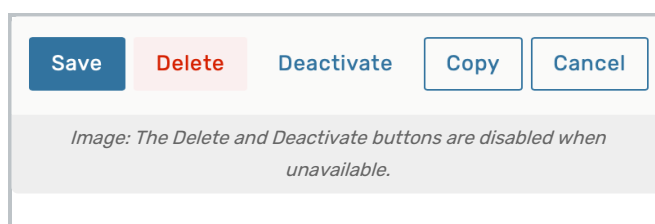
## 1. Access the Folder Type

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.

## 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.