

Setting Up Recommended Resources for the Event Form

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Security Note

To setup custom Event Form configurations and settings, you must have the following permissions setup in [Series25 Group Administration](#): Administrative: 20.0 *Update Event Creation and Editing Configurations*

What Are Recommended Resources?

Typically, resources are selected through a resource search in the event form, but another option is to recommend specific resources based on whether a user's event meets other conditions. For example, you might want to recommend an AV resource to users when they request conference rooms, or when they select an AV custom attribute. This option can be a helpful timesaver, especially for users who aren't as familiar with your 25Live resources.

How to Setup Recommended Resources

This section provides a brief overview of Root Rule configurations specific to Recommended Resources. For a more in-depth overview of setting up root rules please see [Event Form Rules: Adding Conditional Rules for the 25Live Event Form](#)

Rule Settings

- Go to **More** → **System Settings** → **Event Form Settings** → **Rule Settings** → **Actions**
- Select **Add New Root Rule**

Action Rules

Add New Root Rule

Filter:

Rule Name	Active	Actions
Alert: Ext Vendor/Cleaning	Yes	• Alert User

Image: Select the Add New Root Rule button

Create New Rule

Active: No ☐ Yes ☒

Name:

Description:

AND

Operator:

Event Type

Source:

Operator:

Image: Select a Source Type from the Custom Attribute in the Rule Settings

- Add conditions to determine which criteria your recommended resources should be based on.
 - Choose an option from the **Source Type** dropdown.
 - If needed, update your operators
- Under **Targets**, select **Add Recommended Resources**.

Targets

Add Custom Attributes (0) ▾ Add Resources (0) ▾ Add Recommended Resources (0) ^

Select Resources

Add Recommended Locations (0) ▾ Add Requirements (0) ▾ Add Calendar Requirements (0) ▾

Add Categories (0) ▾ Add Contact Role (0) ▾ Set Primary Organization (None) ▾

Add Additional Organizations (0) ▾ Min Additional Time (No) ▾ Set Additional Time (No) ▾

Alert User (0) ▾ Notify User (0) ▾

Save Cancel

Image: Use the Add Recommended Resources target.

- Open the **Select Resources** menu and select any you want to add. Then, press **Done**.
- **Save** your changes.

After setting up your recommended resource rule, users will be able to see them when they make qualifying events.

For more information on setting up Event Form Rules, please see [Event Form Rules Overview: Adding Conditional Rules to an Event Form](#)

Config Settings (Optional)

Recommended resources are available alongside a resource search, but if you'd like users to see recommended resources **exclusively**, update the **Config Settings** with the following steps.

- Navigate to the **Config Settings** under **Event Form Settings**.
- Press the **Edit** button next to an existing configuration to add recommended resources to it.

OR

Create a new configuration with the **Add Config** or **Copy** buttons.

Config Settings

Add Config

Filter:

Config	Default	Default Event Type	Tags	Message	Copy	Edit	Delete
Create - Requestors	No		Add	This event form is designed to collect the information needed to schedule an event. Please be as detailed as possible when submitting this information. * All requests are subject to approval *	Copy	Edit	Delete

Image: Select Edit next to an existing configuration or add a new configuration using the Add Config button.

- Toggle **Use Recommended Resources (instead of resource search)** to **Yes**.
- Make any other necessary changes to the configurations and **Save**.

Default Config:

No ☐ Yes

Automatically Add Custom Attributes:

No ☒ Yes

All Custom Attributes Are Optional:

No ☐ Yes

Allow Spans Midnight Events:

No ☒ Yes

Show All Day Toggle:

No ☒ Yes

Allow Add/Remove Segments:

No ☐ Yes

Use Recommended Resources (instead of resource search):

No ☒ Yes

*Image: When toggled to **Yes**, the **Use Recommended Resources** config setting will eliminate the ability for users to run a resource search in the event form.*