

Organization Data Overview

In 25Live, the term organization refers to any department, campus group, community organization, or other entity that uses 25Live to request or schedule classes or events, and/or that sponsors classes or events.

Organization data is stored on Organization Details pages and in the System Settings.

For an overview of all of the tabs on an organization page, please see: [Viewing Organization Details](#)

For information on how to inline edit this page, please see: [Inline Editing Organization Details](#)

Organization Details Fields

The screenshot displays the 'Alternative Film Club' organization details page. The page has a header with the organization name and a 'More Actions' button. Below the header are tabs for 'Details', 'List', 'Calendar', and 'Audit Trail'. The 'Details' tab is selected, showing an 'Edit Mode' toggle set to 'On'. The page is divided into several sections:

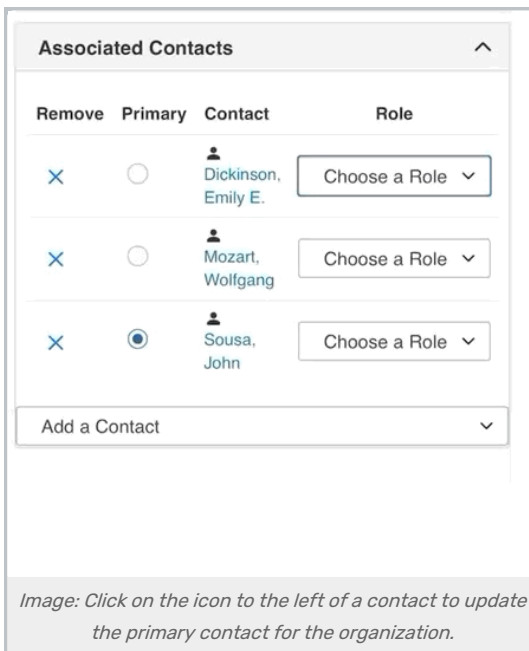
- General:** Includes fields for Type (Student), Rating (Good), and Accounting Code.
- Comments:** A text area with a comment about the club's recent loss of positions and the need to recruit more members.
- Administrative Address:** Fields for Street (123 Street Ave.), City (Portland), State (OR), Zip (97205), and Phone (555-555-1111).
- Billing Address:** Fields for Street (123 University Ln.), City (Portland), State (OR), Zip (97205), Phone (503-555-2222), and Fax (503-555-3333).
- Categories:** A 'Select Categories' button.
- Attributes:** Fields for Club Advisor (Smith, Jane M.) and Website (www.school.edu/altfilmclub). There is an 'Add a Custom Attribute' button.
- Notification Policy:** Fields for Approval Type (By all), Approval required within (Days 3, Hours 0, Minutes 0), and a list of contacts (Smith, Jane) with a 'Notify only' dropdown.
- Partition Preferences:** A 'New Partition Group' button.
- Associated Contacts:** A list of contacts (Garcia, Eric; Chen, Lee; Jordan, Michael) with roles (Club President, Treasurer, Event Organizer) and an 'Add contact' button.

At the bottom of the page, there is a caption: *Image: Example of an organization details page.*

You can store a variety of information about each organization:

- **Short name** - This is the organization's display name. This name is used throughout 25Live and will be shown on associated events, calendars, in search results, etc.
- **Official title** - The official organization name. This may be the same as the organization short name.
- **Type** - The type of organization (academic department, student group, external vendor, etc.)
- **Rating** - Shows a custom [performance rating](#) for the organization (good standing, on probation, etc.)
- **Accounting Code** - The organization code that is used for accounting.
- **Comments** - Custom administrative comments about the organization.

- **Administrative Address, Phone, Fax** - Contact information for the organization.
- **Billing Address, Phone, Fax** - Billing information for the organization.
- **Categories** - Custom descriptors assigned to the organization for grouping, retrieving, and reporting.
- **Attributes** - Custom organization data fields, such as a website URL or club adviser contact name.
- **Approval Type** ([Notification Policy](#)) - Defines whether one or all contacts should interact with tasks for the organization.
 - **By at least one** - Notification tasks will be marked complete as soon as one user responds.
 - **By all** - All users must respond individually in order for the task to be completed.
- **Approval required within** (Notification Policy) - When 25Live generates a notification task, this is how many days, hours, and minutes before it is due.
- **Add Contact** (Notification Policy) - Who should be notified when the organization is attached to an event.
- **Partition Preferences** - [Groups of locations](#) that the organization prefers to reserve. Used by the Schedule25 Optimizer.
- **Associated Contacts** - Organization contacts and their [role](#) in the organization.
 - Use the **X** icon to **Remove** a contact.
 - In the **Primary** column, a filled radio button next to the contacts indicates who is primary contact. If multiple contacts are associated with the organization, you can update the primary contact by tapping or clicking on the radio buttons.
 - The **Role** dropdown menu can be used to assign other roles to contacts.
 - The **Add a Contact** menu contains a search to find new contacts to add.



Organization Master Definitions

When adding and editing organization details, some fields have you make a selection from a menu. To populate these

various menus, you will need to update your [master definitions](#) in the 25Live System Settings.

Custom Attributes

Custom attributes allow you to create data fields that are not available by default on details pages. For more information on setting up organization custom attributes, please see [Adding and Editing Custom Attributes In 25Live](#).

In addition to the organization custom attributes you create, 25Live includes two system-supplied organization custom attributes. These items can't be edited or deleted, but can be deactivated.

- **X25 CIP Code** — The CIP code for a department, defined by the NCES.
 - *Not currently in use.*
- **X25 College** — Used to specify a location's associated college, division, or professional school for X25 space analysis purposes.
- *For more information on these values, please see [X25 Room Use Codes](#).*

Categories

Categories provide a way to group, retrieve, and report on your organizations. For information on setting up your organization [category master definitions](#), please see [Adding and Editing Categories In 25Live](#).

Roles

When configuring the Associated Contacts, you can select the role of the contact within the organization. For more information on setting up organization roles, please see [Adding and Editing Roles in 25Live](#).

In addition to the roles you create, 25Live includes one system-supplied role, which cannot be edited or deleted, but can be deactivated:

- **Billing Contact** — Used to designate the name of the contact who pushes events to the 25Live accounting system.

Partitions

Partitions represent groups of locations—such as the floor of a building or an area of campus. Each organization can have several partition preferences. For information on setting up your partition master definitions, please see [Adding and Editing Partitions In 25Live](#).

Organization Types

Organization Types represent the kinds of organizations and groups that may request, schedule, or sponsor classes or events. For information on setting up your organization type master definitions, please see [Adding and Editing Org Types In 25Live](#).

Organization Ratings

Organizations may have ratings to assess their performance, as defined by your institution. For information on setting up your organization rating master definitions, please see [Adding and Editing Org Ratings In 25Live](#).

Organization Partition Preferences

To effectively use the [Schedule25 Optimizer](#), you should define and prioritize the partition preferences of each department or organization whose classes and/or events are to be placed in rooms by the Optimizer. The Optimizer uses these partition preferences to focus its room search on the specific campus locations preferred by departments and organizations.

You can define as many as four campus partition preferences for each organization. Each preference can include one or more partitions from your Location Partitions master definition.

Partition Preferences

1

↑ ↓ ×

Highland Science Center

×

Select from Partitions

2

↑ ↓ ×

Marshall Hall

×

Select from Partitions

3

↑ ↓ ×

Baker Classroom Complex

×

Select from Partitions

New Partition Group

Image: Partition Preferences section of the Organization Details.

Location Effective Dating:

None

Optimize Results For:

Best utilization (default)

Better placement (lower utilization)

Best placement (lower utilization / partition preference)

Sum Cross-listed Enrollments:

☒

Save

Image: The Schedule25 Optimizer considers partition preferences when generating location assignments.

You also prioritize each of the partition preferences you’ve defined for an organization to let the Optimizer know the organization’s first, second, third, and fourth choice partition preferences in order of preference.