25Live Data Administration Guide

Data Administration Functions of the 25Live Administration Utility

The 25Live Administration Utility is used to create and maintain the data used in your 25Live environment. The Utility allows authorized 25Live users to perform the following data administration functions:

- Create and maintain cabinets, folders, locations, resources, contacts, and organizations
- Manage events—bind back-to-back events, export event vCalendar responses to your SIS, delete events
- Create and maintain event, location, resource, contact, and organization master lists
- Add and manage images
- Remove pending location and resource reservations
- Create and manage the Event Type Hierarchy
- Export data to X25

The 25Live Administration Utility is also used to:

- Set up and manage 25Live security. For information, see the 25Live Security Administration Guide available by clicking Help and choosing “Security Administration.”
- Set up and manage 25Live event pricing. For information see the 25Live Event Pricing Guide available by clicking Help and choosing “Event Pricing.”
- Integrate custom reports into the 25Live environment. For information, see the 25Live Custom Report Integration document available by clicking Help and choosing “Custom Report Integration.”
Guide Contents

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Accessing documentation for earlier Utility releases

If you’re using an earlier release of 25Live and want to access the Administration Utility document for that release do the following:

1. Access the 25Live Documentation page of Customer Resources:
   http://knowledge25.collegenet.com/display/CustomerResources/25Live+Documentation

2. Scroll to the bottom of the page and click the link for the 25Live release you’re using to access the document archive for that release.

3. Click the “25Live Administration Utility” link.
### Data Administration Tabs

The 25Live Administration Utility provides the following data administration tabs:

<table>
<thead>
<tr>
<th>This tab...</th>
<th>Lets 25Live users with appropriate security permissions...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Events</td>
<td>• Maintain event master lists: Categories, Custom Attributes, Contact Roles, Requirements (Calendar), and Requirements (Other)</td>
</tr>
<tr>
<td></td>
<td>• Create and maintain the Event Type Hierarchy</td>
</tr>
<tr>
<td></td>
<td>• Add new cabinets and folders</td>
</tr>
<tr>
<td></td>
<td>• Copy folders as the basis for creating new folders</td>
</tr>
<tr>
<td></td>
<td>• Edit one or more cabinets and folders</td>
</tr>
<tr>
<td></td>
<td>• Delete cabinets and folders</td>
</tr>
<tr>
<td></td>
<td>• Delete events</td>
</tr>
<tr>
<td></td>
<td>• Bind back-to-back events</td>
</tr>
<tr>
<td></td>
<td>• Export event vCalendar responses to your SIS</td>
</tr>
<tr>
<td></td>
<td>• Export data to X25</td>
</tr>
</tbody>
</table>

This tab also allows you to perform the following security-related tasks as described in the 25Live Security Administration Guide:

• Set object security access permissions to specific events, folders, and cabinets by 25Live security groups

• Set default object security access to event drafts, events, cabinets, and folders for 25Live security groups
<table>
<thead>
<tr>
<th>This tab...</th>
<th>Lets 25Live users with appropriate security permissions...</th>
</tr>
</thead>
</table>
| Locations  | • Maintain location master lists: Categories, Custom Attributes, Features, Layouts, and Partitions  
• Add new locations  
• Copy locations as the basis for creating new locations  
• Edit one or more locations  
• Delete locations  
• Remove pending location reservations  
This tab also allows you to perform the following security-related tasks as described in the *25Live Security Administration Guide*:  
• Set object security access permissions, assignment policies, and notification policies for specific locations by 25Live security groups  
• Set default object security access to locations for 25Live security groups |
| Resources   | • Maintain resource master lists: Categories and Custom Attributes  
• Add new resources  
• Copy resources as the basis for creating new resources  
• Edit one or more resources  
• Delete resources  
• Remove pending resource reservations  
This tab also allows you to perform the following security-related tasks as described in the *25Live Security Administration Guide*:  
• Set object security access permissions, assignment policies, and notification policies for specific resources by 25Live security groups  
• Set default object security access to resources for 25Live security groups |
<table>
<thead>
<tr>
<th>This tab...</th>
<th>Lets 25Live users with appropriate security permissions...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contacts</td>
<td>- Maintain the Contact Custom Attributes master list</td>
</tr>
<tr>
<td></td>
<td>- Add new contacts</td>
</tr>
<tr>
<td></td>
<td>- Copy contacts as the basis for creating new contacts</td>
</tr>
<tr>
<td></td>
<td>- Edit one or more contacts</td>
</tr>
<tr>
<td></td>
<td>- Delete contacts</td>
</tr>
<tr>
<td></td>
<td>This tab also allows you to perform the following security-related tasks as described in the 25Live Security Administration Guide:</td>
</tr>
<tr>
<td></td>
<td>- Add and manage 25Live users</td>
</tr>
<tr>
<td></td>
<td>- Activate and deactivate 25Live users</td>
</tr>
<tr>
<td></td>
<td>- See which users are currently logged into 25Live</td>
</tr>
<tr>
<td>Organizations</td>
<td>- Maintain organization master lists: Categories, Custom Attributes, Types, Ratings, and Contact Roles</td>
</tr>
<tr>
<td></td>
<td>- Add new organizations</td>
</tr>
<tr>
<td></td>
<td>- Copy organizations as the basis for creating new organizations</td>
</tr>
<tr>
<td></td>
<td>- Edit one or more organizations</td>
</tr>
<tr>
<td></td>
<td>- Delete organizations</td>
</tr>
<tr>
<td></td>
<td>This tab also allows you to perform the following security-related tasks as described in the 25Live Security Administration Guide:</td>
</tr>
<tr>
<td></td>
<td>- Set object security access permissions and notification policies for specific organizations by 25Live security groups.</td>
</tr>
<tr>
<td></td>
<td>- Set default object security access to organizations for 25Live security groups</td>
</tr>
<tr>
<td>Images</td>
<td>- Add and manage images</td>
</tr>
</tbody>
</table>
Accessing the Administration Utility

Your ability to access the 25Live Administration Utility and use its functionality is controlled by the functional and object security privileges of the 25Live security group to which you belong. For example, if your security group has permission to manage specific locations, but not perform other location-related tasks, only the Manage Locations task tab and those specific locations will appear in your view of the Administration Utility.

1. Enter your 25Live URL followed by “/admin.html” in your browser and click <Enter>.

2. On the Administration Utility sign in page, enter your 25Live username and password.

3. Click Sign In.
Using the Administration Utility

The Administration Utility is very easy to use.

1. From the Home tab, click the data administration task you want to perform from the Events, Locations, Resources, Contacts, Organizations, and Images data type options.
   or
2. From the Events, Locations, Resources, Contacts, Organizations, or Images tab, click the data administration task you want to perform for the selected data type.

Either of these actions opens the selected task page with the appropriate task tab selected on the left.

Locations > Manage Locations example:

2. Perform the task. Basic instructions for doing so are provided below the task name in the Administration Utility. This document contains detailed instructions and guidelines for performing each task.

3. Save your work by clicking the appropriate button at the bottom of the page.
**25Live Data Preparation**

If you’re a new Series25 customer, read this section to get an understanding of the tasks you must perform in the 25Live Administration Utility to prepare the data in your Series25 environment, and the order in which you must perform them.

If you’re an existing customer and have already implemented your Series25 environment, you can skip this section and use the remainder of this document as a reference guide to managing your Series25 data using the 25Live Administration Utility.

**The Series25 data preparation process**

Preparing Series25 data is a five-step process.

**Step 1: Prepare location data.**

During this process step, you identify and define each location (room, auditorium, playing field, parking lot, and so on) that could be assigned to events.

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Learn about the location data that can be created in your Series25 environment.</td>
<td>54</td>
</tr>
<tr>
<td>2. Create master lists of elements that define locations.</td>
<td>60</td>
</tr>
<tr>
<td>3. Create locations.</td>
<td>63</td>
</tr>
</tbody>
</table>

**Step 2: Prepare resource data.**

During this process step, you identify and define each resource (equipment, service, personnel) that could be assigned to events.

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Learn about the resource data that can be created in your Series25 environment.</td>
<td>69</td>
</tr>
<tr>
<td>5. Create master lists of elements that define resources.</td>
<td>74</td>
</tr>
<tr>
<td>6. Create resources.</td>
<td>76</td>
</tr>
</tbody>
</table>
Step 3: Prepare contact data.
During this process step, you identify and define each contact (25Live users and other individuals) who could be associated with events.

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>81</td>
</tr>
<tr>
<td>8</td>
<td>82</td>
</tr>
<tr>
<td>9</td>
<td>84</td>
</tr>
<tr>
<td>7</td>
<td>Learn about the contact data that can be created in your Series25 environment.</td>
</tr>
<tr>
<td>8</td>
<td>Create the Contact Custom Attributes master list.</td>
</tr>
<tr>
<td>9</td>
<td>Create contacts.</td>
</tr>
</tbody>
</table>

Step 4: Prepare organization data.
During this process step, you identify and define each organization (academic department, campus group, community organization) that could request, schedule, or sponsor events.

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>88</td>
</tr>
<tr>
<td>11</td>
<td>91</td>
</tr>
<tr>
<td>12</td>
<td>93</td>
</tr>
<tr>
<td>10</td>
<td>Learn about the organization data that can be created in your Series25 environment.</td>
</tr>
<tr>
<td>11</td>
<td>Create master lists of elements that define organizations.</td>
</tr>
<tr>
<td>12</td>
<td>Create organizations and associate contacts with them.</td>
</tr>
</tbody>
</table>

Step 5: Prepare the event structure.
During this process step, you define how you want your event scheduling environment to work based on the needs of each scheduling office and your business practices and procedures. This involves defining event master data, defining your event structure and rules, and building the event structure.

<table>
<thead>
<tr>
<th>Task</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>14</td>
<td>15</td>
</tr>
<tr>
<td>13</td>
<td>Learn about the event data that can be created in your Series25 environment.</td>
</tr>
<tr>
<td>14</td>
<td>Create master lists of elements that define events.</td>
</tr>
<tr>
<td>Task</td>
<td>Page</td>
</tr>
<tr>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>15</td>
<td>Learn about the Event Type Hierarchy that defines your event structure.</td>
</tr>
<tr>
<td>16</td>
<td>Create the Event Type Hierarchy.</td>
</tr>
<tr>
<td>17</td>
<td>Learn about the event structure (cabinets and folders) used to house and organize events.</td>
</tr>
<tr>
<td>18</td>
<td>Create Cabinets.</td>
</tr>
<tr>
<td>19</td>
<td>Create Folders.</td>
</tr>
</tbody>
</table>
**Events Data Administration**

**Event data**

**Definition of event**

The term *event* refers to any class, meeting, conference, or other activity created and/or managed in 25Live. Events are either classes imported into 25Live from your SIS via the Series25-SIS Interface or events created in 25Live in your school’s day-to-day scheduling process.

**Event example**

Here’s an example of a 25Live event showing the event’s name, title, type, internal reference number, state, sponsoring organization, categories, expected and registered head counts, event occurrence details, and related events.

**Event master lists**

Some event data comes from event master lists—comprehensive, relatively stable lists of event attributes. Those creating events apply the available and appropriate items from these lists to each event.

<table>
<thead>
<tr>
<th>This event master list...</th>
<th>Is a list of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event Categories</td>
<td>Ways you want to group events, such as Academic, Athletic, Community, and so on.</td>
</tr>
<tr>
<td>Event Custom Attributes</td>
<td>Additional data elements you want to track about events. See “Custom attributes” on page 13.</td>
</tr>
</tbody>
</table>
Event Contact Roles | Roles contacts may perform for an event, such as Emergency Contact, Facilitator, and so on.

Event Requirements (Calendar) | Event publishing requirements of events that allow 25Live Publisher users to specify which calendar(s) specific events should be published to.

Event Requirements (Other) | Other requirements of events—needs that are relevant to an event as a whole, such as a parking permit for an extension class or an alcohol permit for a theater reception.

---

**Event master list example**

This is an example of the Event Categories master list:

**Custom attributes**

**Description**

In addition to other data, the 25Live Administration Utility allows you to create and maintain any custom attributes (additional data) you want for events, as well as for locations, resources, contacts, and organizations. These custom attributes are entered in a master list (as described on page 12 for the Event Custom Attributes master list) and then applied to individual events, locations, resources, contacts, and organizations as needed.
**Data types**

When creating custom attributes, you must select a data type for each. The data type determines what kind of data users must enter in each custom attribute field when creating an event in 25Live or a location, resource, contact, or organization in the 25Live Administration Utility.

<table>
<thead>
<tr>
<th>This data type...</th>
<th>Limits data entry to...</th>
<th>And requires users to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boolean</td>
<td>Yes/No condition</td>
<td>Select Yes or No.</td>
</tr>
<tr>
<td>Contact</td>
<td>A valid 25Live contact name</td>
<td>Select a contact.</td>
</tr>
<tr>
<td>Date</td>
<td>Date only</td>
<td>Type or select a date.</td>
</tr>
<tr>
<td>Date Time</td>
<td>Date and time</td>
<td>Type or select a date and time.</td>
</tr>
<tr>
<td>File</td>
<td>Path name of a file or URL</td>
<td>Type a file or URL.</td>
</tr>
<tr>
<td>Floating Point</td>
<td>A number which may have a decimal</td>
<td>Type a number that may have a decimal.</td>
</tr>
<tr>
<td>Image</td>
<td>Path name to an image file</td>
<td>Browse and select an image file.</td>
</tr>
<tr>
<td>Integer</td>
<td>A whole number</td>
<td>Type a whole number.</td>
</tr>
<tr>
<td>Location</td>
<td>A valid 25Live location name</td>
<td>Browse and select a location.</td>
</tr>
<tr>
<td>Long Text</td>
<td>Long text or other alphanumeric characters (no maximum number of characters)</td>
<td>Type text and/or other alphanumeric characters.</td>
</tr>
<tr>
<td>Organization</td>
<td>A valid 25Live organization name</td>
<td>Browse and select an organization.</td>
</tr>
<tr>
<td>Resource</td>
<td>A valid 25Live resource name</td>
<td>Browse and select a resource.</td>
</tr>
<tr>
<td>Text</td>
<td>Text and/or other alphanumeric characters (maximum 80 characters)</td>
<td>Type text and/or other alphanumeric characters.</td>
</tr>
<tr>
<td>Time</td>
<td>Time only</td>
<td>Type a time.</td>
</tr>
</tbody>
</table>
Events tab

The Events tab of the Administration Utility lets you perform these data administration tasks:

- Manage event master lists
- Create and manage your Event Type Hierarchy
- Add and manage cabinets
- Add and manage folders
- Manage events—bind back-to-back events, export event vCalendar responses to your SIS, delete events
- Export data from your Series25 database to X25 for analysis

Managing event master lists

<table>
<thead>
<tr>
<th>Functional security required to manage event master lists</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To be able to...</strong></td>
</tr>
<tr>
<td>View and edit event master lists and deactivate, create, and delete items in them</td>
</tr>
</tbody>
</table>

Event master list task tabs

Use the appropriate event master list task tab—Categories, Custom Attributes, Contact Roles, Requirements (Calendar), or Requirements (Other)—to add or update its associated master list.

**Note**  Any legacy requirements your school used in R25 appear in the Requirements (Other) master list.
## Guidelines for adding event master lists

<table>
<thead>
<tr>
<th>When adding this master list...</th>
<th>Follow these guidelines...</th>
</tr>
</thead>
</table>
| **Event Categories**            | • Create categories that make it easy for users to group, track, and report on events. For example, categories that assist in:  
  • Reporting on events; for example, generating a report of all community-sponsored, public events.  
  • Helping web visitors using your published event calendars learn about campus events based on category. |
| **Custom Attributes**           | • Create custom attributes that will allow users to provide additional needed event information.  
  • Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, Entrance Fee ($) or High Risk Activity? |
| **Contact Roles**               | • Create roles for all the activities contacts might potentially perform for events so schedulers and other users can direct information and requests to the appropriate person.  
  • Include only roles you want to track for events. |
| **Requirements (Calendar)**     | • Create calendar requirements that allow authorized 25Live users to indicate which web calendar(s) an event should be published to; for example, Publish to Athletics Calendar. |
### When adding this master list...

<table>
<thead>
<tr>
<th>Requirements (Other)</th>
<th>Follow these guidelines...</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Think of items that apply to the overall event.</td>
</tr>
<tr>
<td></td>
<td>- Determine which requirements you want to allow users to enter a quantity of when creating an event.</td>
</tr>
<tr>
<td></td>
<td>- Remember that quantities of requirements aren’t automatically decremented. If you need decrementing, create a resource instead. See “Resources Data Administration” on page 69.</td>
</tr>
</tbody>
</table>

### To add or update an event master list

1. Click the task tab of the master list you want to add or update.
2. Add or update the list.

**Note** Be aware that all of the updates you make to a list (item additions/deletions, activates/deactivates) are made simultaneously when you click Update.
### Managing event master lists

**Note** For the Event Requirements (Calendar) and Event Requirements (Other) master lists, you can also view and edit the notification policy associated with a requirement, if any, or create a notification policy. For information on notification policies, see the 25Live Security Administration Guide accessible by clicking Help.

3. **Click Update <list>**.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
</table>
| Add an item to the list      | 1. Click Add <item>.  
|                              | 2. Enter the item name in the space provided.                             |
|                              | 3. Choose the data type (Custom Attributes only).                         |
|                              | 4. Check the Allow Quantity box if you want 25Live users to be able to specify a quantity of the requirement (Event Requirements: Other only). |
|                              | 5. Uncheck the Active box if you don’t want the item to be active at this time. |
| Activate or deactivate list items | Check or uncheck the Active box of each item.                           |
| Delete list items            | Check the Delete box of each item.                                       |

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The Event Type Hierarchy

Pages 19 through 37 describe a key and required task in the implementation of your Series25 environment—the creation of the Event Type Hierarchy. If you have completed your Series25 implementation, your institution has already completed this critical task, but can use the Events > Event Type Hierarchy functionality of the 25Live Administration Utility to deactivate/activate, copy, edit, and delete existing cabinet types, folder types, and event types as needed.

### Description of Event Type Hierarchy

The 25Live Administration Utility graphically incorporates the concept of cabinets and folders to represent how events are housed and organized in your Series25 database, as shown here:

The **Event Type Hierarchy** is the underlying, conceptual, organizational “blue print” that defines the “real” or “live” cabinet, folder, and event structure of your Series25 environment.
In this example, the section of the Event Type Hierarchy on the left is the “blue print” for the actual cabinet, folder, and event structure on the right.

The Hierarchy is displayed in the 25Live Administration Utility in a file directory fashion that shows the hierarchical or nesting relationship of cabinet, folder, and event “types.” In the hierarchy example shown above there is an “Athletic” cabinet type, a “Team” folder type, and “Game / Meet / Match,” “Practice,” and “Scrimmage” event types.
One hierarchy section is used to create multiple cabinets

Each cabinet/folder/event type section of the hierarchy provides the conceptual template for multiple cabinets and their folder and event structure, as shown here.

...was used to build these cabinets:

This section of the hierarchy...

Purpose of the Event Type Hierarchy

The Event Type Hierarchy serves these important event organizational and scheduling purposes:

- To allow 25Live to properly place, or “file,” events in your Series25 database
- To reflect your scheduling environment and business processes
- To provide for the inheriting of data from a folder or cabinet to reduce duplicate data entry
- To streamline scheduling activities by allowing you to specify reports and data properties of events by event type
Event Type Hierarchy sections

Each section of the Event Type Hierarchy is composed of:

- A single cabinet type
- One or more folder types (optional)
- One or more event types (required)

Cabinet types

Cabinet types are the highest-level component of each Event Type Hierarchy section. They are the “containers” for folder types and event types.

Folder types

Folder types are mid-level components of each Event Type Hierarchy section. They are the “containers” for other folder types and/or event types.

Defining folder types allows further refinement in how like events can be “filed” and makes it possible for events to inherit data defined at the folder level.

Note  Having folder types within cabinet types is optional but recommended for more effective event organization and event searching and reporting.

Event types

Event types are the lowest-level components of each Event Type Hierarchy section. They don’t “contain” anything, but are contained in folder types and/or cabinet types. Each event created in 25Live must be assigned an event type.
Examples
Here are some examples of Event Type Hierarchy sections. We recommend that you build each section of your Hierarchy similarly to these to ensure that new events you create in 25Live and classes imported for the first time into 25Live from your SIS can be properly routed into your event structure. You may, of course, have additional or different event types than those shown in these examples.

Example 1: Academic section
Academic Term
  Subject
  Section

Example 2: Special events section
Special Events
  Scheduling Office
    Meeting
    Workshop
  Party

Example 3: Athletic events section
Athletics
  Sport
    Game
    Practice
    Scrimmage

Data inheritance rules
Each cabinet type, folder type, and event type in your Event Type Hierarchy has defined data inheritance rules that control:

- The data used by cabinets, folders, and events in your 25Live event structure
- The data inherited by folders and events in your event structure
- Whether or not users can view and/or enter particular kinds of data for cabinets, folders, and events of particular types
- Whether or not users can edit particular kinds of data for cabinets, folders, and events of particular types
25Live comes with a set of default inheritance rules, but you can modify specific rules by type in the 25Live Administration Utility.

Data inheritance rules allow you to:

- Define the kinds of data you want to track for cabinets, folders, and events of different types.
- Reduce the amount of data entry required to create events. Users can create data once, for example at the cabinet level, and have all or selected folders and events in the cabinet automatically inherit that data.

Data inheritance is governed by the Event Type Hierarchy that underlies your cabinets, folders, and events. When you set the data inheritance rules for a particular cabinet type, folder type, or event type, those rules are applied to all the cabinets, folders, and events in your event structure of the same types.

- **Cabinets**: Since cabinets are at the highest level of your event structure, they can’t inherit data. Data you create at the cabinet level can be set up to be inherited by folders and events within the cabinet.

  For example, dates for holidays and breaks can be set at the cabinet level and inherited by all folders and events within the cabinet.

- **Folders**: Folders can inherit data from their cabinet and/or from higher level folders in their cabinet. Data you create at the folder level can be set up to be inherited by folders and events within the folder.

  For example, folders that contain class sections for each academic subject can include the organization (department) associated with that subject, and those organizations can be inherited by the folders and events within each subject folder.

- **Events**: Events can inherit data from their cabinet and/or from their folder. Data created at the event level (for example, space preferences) applies only to that event, since events are the lowest level in your event structure.
Data groups by type

Appropriate data groups can be selected for a particular cabinet type, folder type, or event type:

- Custom Attributes can be set for event types
- Constraints, such as holidays and other times events shouldn’t take place, can be set for cabinet types, folder types, and event types
- Event Categories can be set for cabinet types, folder types, and event types
- Organizations can be set for folder types and event types
- Space Preferences can be set for event types

Data associated with a cabinet type or folder type can be specified to be inherited.

Inheritance rules example

Here is an example of how the date/time constraint data inheritance rules set up for an academic section of the Event Type Hierarchy affect one of the cabinets defined by that section.

The data inheritance rules in this hierarchy section...  

<table>
<thead>
<tr>
<th>Semester cabinet type</th>
<th>Academic Subject folder type</th>
<th>Section event type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow date/time constraints to be defined.</td>
<td>Inherit “locked” date/time constraints from cabinet, and can add new constraints</td>
<td>Inherit “locked” date/time constraints from folder and can’t add new constraints</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Spring Term 2013 cabinet</th>
<th>English folder</th>
<th>Section 101b</th>
</tr>
</thead>
</table>
### Inheritance rule options

You have the following options to choose from when defining data inheritance rules by type for a particular data group.

- **Show Data**
- **Hide Data**

Determines whether the data group appears in cabinets, folders, or events of the selected type.

- **Local Edit**

Determines whether data in the data group can be created for cabinets, folders, or events of the selected type. “Show Data” must be selected.

- **Inherit**
- **Override**
- **Locked**

Determines whether or not folders and/or events of the selected type inherit the data defined for the data group from their cabinet or folder, and whether or not users can override the inherited data. “Show Data” must be selected.

### How data inheritance rules work in combination

The following table shows how the data inheritance rules work in combination for a particular cabinet type, folder type, or event type for a particular data group, assuming that Show Data has been selected:

<table>
<thead>
<tr>
<th>If the inheritance rule is...</th>
<th>Then...</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="check" alt="Local Edit" /> <img src="check" alt="Inherit" /> <img src="check" alt="Override" /> <img src="check" alt="Locked" /></td>
<td>The user can define new data of this kind, but can’t edit or delete (override) inherited data of this kind.</td>
</tr>
<tr>
<td><img src="check" alt="Local Edit" /> <img src="check" alt="Inherit" /> <img src="check" alt="Override" /> <img src="check" alt="Locked" /></td>
<td>The user can define new data of this kind, and edit or delete (override) inherited data.</td>
</tr>
</tbody>
</table>
The Event Type Hierarchy

If the inheritance rule is... Then...

- Local Edit
- Inherit
- Override
- Locked

The user can edit or delete (override) inherited data of this kind, but can’t define new data.

Default data inheritance rules

25Live comes with default inheritance rules, shown below, that should be suitable for most Event Type Hierarchies. Cabinet type defaults are applied to all cabinet types, folder type defaults to all folder types, and event type defaults to all event types. If the default rules won’t work for you in all cases, you can define appropriate inheritance rules for individual types in the 25Live Administration Utility.

<table>
<thead>
<tr>
<th>Hierarchy section</th>
<th>Custom Attributes</th>
<th>Constraints</th>
<th>Event Categories</th>
<th>Organizations</th>
<th>Space Preferences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cabinet type</td>
<td>N/A</td>
<td>Show Data</td>
<td>Show Data</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Folder type</td>
<td>N/A</td>
<td>Show Data</td>
<td>Show Data</td>
<td>Show Data</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Inherit Data (Override)</td>
<td>Inherit Data (Override)</td>
<td>No Inherit Data</td>
<td></td>
</tr>
<tr>
<td>Event type</td>
<td>Show Data</td>
<td>Show Data</td>
<td>Show Data</td>
<td>Show Data</td>
<td>Show Data</td>
</tr>
<tr>
<td></td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td>Allow Local Edit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>No Inherit Data</td>
<td>Inherit Data (Override)</td>
<td>Inherit Data (Override)</td>
<td>No Inherit Data</td>
<td>No Inherit Data</td>
</tr>
</tbody>
</table>
You can associate certain reports and data properties with event types in your Event Type Hierarchy.

**Note** You can also associate notification policies with event types, as described in the 25Live Security Administration Guide, accessible by clicking Help.

### Associating reports with event types

When you associate one or more event reports with an event type, when a new event of that type is created, authorized users can generate any of its associated reports directly from the 25Live Event Details.

### Associating data properties with event types

When you associate data properties with an event type, when a scheduler creates a new event of that event type, those properties are displayed for selection and data entry in the 25Live Event Wizard if either of these conditions is met:

- The data property has also been selected for display in the 25Live Configuration Utility and the scheduler’s security group has “Can view abridged list” Master Definitions: Event functional security rights.
- The scheduler’s security group has at minimum “Can view all” Master Definitions: Event functional security rights.

For example, if you attach a “Parking Permit Required” event requirement to the “Community Workshop” event type, when a scheduler creates an event of that type, it automatically has the “Parking Permit Required” requirement as an option if one of the functional security conditions listed above is met.

This table lists and describes the data properties you can associate with event types.

<table>
<thead>
<tr>
<th>This property...</th>
<th>Defines...</th>
</tr>
</thead>
<tbody>
<tr>
<td>vCal Processing</td>
<td>What 25Live should do with events of this type once they’ve been successfully imported into the Series25 environment from your SIS and had a location assigned as needed. For more information, see the Implementing and Using the Series25-SIS Interface v4.0 manual available here: <a href="http://knowledge25.collegenet.com/display/CustomerResources/Series25+Interface+Documentation">http://knowledge25.collegenet.com/display/CustomerResources/Series25+Interface+Documentation</a></td>
</tr>
</tbody>
</table>
The Event Type Hierarchy

For example, “Meeting” events in an “Administrative” folder might have properties like:

<table>
<thead>
<tr>
<th>This property...</th>
<th>Defines...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Categories</td>
<td>The default event categories of the event type. Once associated with an event type, the selected categories are automatically associated with new events of that type.</td>
</tr>
<tr>
<td>Contact Roles</td>
<td>The event roles you want to track for the event type. Once assigned to an event type, the selected role labels are automatically displayed in new events of that type. The scheduler can then indicate who will be performing each of the selected roles for a particular event.</td>
</tr>
<tr>
<td>Custom Attributes</td>
<td>The event custom attributes you want to track for the event type. Once associated with an event type, the selected custom attribute fields are automatically displayed in new events of that type. The scheduler can then enter appropriate values for each of the selected custom attributes for a particular event.</td>
</tr>
<tr>
<td>Requirements (Publish to Calendar)</td>
<td>The default “Publish to Calendar” requirements of the event type. Once associated with an event type, the selected requirements are automatically associated with new events of that type.</td>
</tr>
<tr>
<td>Requirements (Other)</td>
<td>The default “Other” requirements of the event type. Once associated with an event type, the selected requirements are automatically associated with new events of that type.</td>
</tr>
</tbody>
</table>

For example, “Meeting” events in an “Administrative” folder might have properties like:

<table>
<thead>
<tr>
<th>Property</th>
<th>Property value</th>
</tr>
</thead>
<tbody>
<tr>
<td>vCal Processing</td>
<td>Locked Transactional (the default, not applicable to this event type)</td>
</tr>
<tr>
<td>Categories</td>
<td>Faculty Event</td>
</tr>
<tr>
<td>Contact Roles</td>
<td>Requestor</td>
</tr>
<tr>
<td></td>
<td>Scheduler</td>
</tr>
<tr>
<td></td>
<td>Facilitator</td>
</tr>
<tr>
<td>Custom Attributes</td>
<td>If Canceled, Notify</td>
</tr>
<tr>
<td></td>
<td>Special Needs</td>
</tr>
</tbody>
</table>
Note In R25, all requirements were available to choose from when creating an event regardless of the event type selected. This has been changed in 25Live so requirements now behave in the same manner as contact roles and custom attributes and must be associated with event types to have them appear in the Event Wizard.

Guidelines for associating data groups with event types

In associating event categories, contact roles, custom attributes, and requirements with event types, follow these guidelines:

- Choose categories that make it easy for users to search for and report on events—so, for example, a scheduler could easily find and report on all events in the “Open to the Public” event category.
- Choose applicable event contact roles to ensure that schedulers can enter the appropriate contact name(s) for events—so, for example, those who schedule student-sponsored events have a way to specify who the “Student Organizer” of the event is.
- Choose applicable event custom attributes to ensure that schedulers supply the additional information needed for different types of events. For example, to ensure that all athletic events have a place to record “Injuries.”
- Choose applicable Requirements (Publish to Calendar) requirements to ensure that those publishing events know what web calendar(s) specific events should be published to.
- Choose applicable Requirements (Other) to ensure that selected requirements are available to events that need them—so, for example, community workshops would always have a “Parking Permit Required” requirement option.
How properties appear in the 25Live Event Wizard

When schedulers create or edit an event of a particular type using the 25Live Event Wizard, the categories, contact roles, custom attributes, and requirements you’ve selected for that event type (and that are available to schedulers based on the Master Definitions: Event functional security rights of their security group) are available for selection, as shown in this event categories example:

Guidelines for creating your Event Type Hierarchy

Planning your hierarchy

Answer the following questions about your institution before you begin creating your Event Type Hierarchy:

- How do you organize academic events? By semester? By quarter? By campus? By college?
- How do you organize special events? By school year? By calendar year? By scheduling office? By sponsoring organization? By type of event?
- How do you organize administrative, athletic, maintenance, and other types of events?

Guidelines

In creating your Event Type Hierarchy:

- Make sure each section of your Hierarchy is complete and accurate to minimize the need to change it later.
- Base your Hierarchy on the structure of your scheduling organization and/or your course catalog.
- Build your Hierarchy to take maximum advantage of the default event routing rule used to route new and newly imported events into the Series25 database. See “The default routing rule” on page 32.
• Start small and add complexity later, but make sure each section of the Hierarchy accurately reflects your scheduling environment.

• Start out with just a few basic Hierarchy sections; for example, an academic term section and a special events section. Add additional sections as needed later.

• Create as many event types as you need, but don’t define so many that users find it difficult to know which to select for an event. If you define too few, events may be harder to sort, and you’ll have less opportunity to take advantage of the feature that allows you to associate data properties for different event types.

• Don’t organize your Hierarchy based on where events occur. Instead, organize it based on who the events are for or who schedules them. Security and location assignment policies handle locations.

The default routing rule

25Live uses a default routing rule to automatically place events in your event structure. You should build your Event Type Hierarchy to make maximum use of the default routing rule.

Default routing rule conditions

The default routing rule uses these conditions to determine in which folder to place an event:

• **Event type**
  The folder must be an appropriate “parent” for the event based on its event type and your Event Type Hierarchy.

• **Date range**
  The date range of the event must fall within the date range of the “parent” folder.

• **Organization**
  If more than one folder meets both the above conditions, 25Live looks for a folder with the same sponsoring organization as the event.

• **Event category**
  If more than one folder meets all the above conditions, 25Live looks for a folder in the same event category as the event. Assigning categories to folders is optional.

25Live must find only one folder in your event structure that meets these conditions or it can’t automatically place the event using the default routing rule and will instead ask you what folder the event should be saved in.
Example of how the default routing rule works
In the example on the next page, the class Econ200-01 with the following properties is imported into 25Live from the SIS:

Event type: Section
Date range: 9/17/13 - 12/12/13
Primary organization (subject): Economics
Event category: Standard Term

1. 25Live checks for parent event type.
Because cabinet, folder, and event types are unique, 25Live looks for the appropriate parent type for Section—in this case, Subject. It can now narrow its placement search to just those cabinets that have folders with Subject folder types.

2. 25Live determines the start and end dates of the class, its sponsoring organization, and the event categories it belongs to.
Only the Economics folder in the Fall13 cabinet has a Subject folder type, a date range that includes 9/17/13 through 12/12/13, the same organization as the class, and the same event category as the class.

3. 25Live successfully places the imported class in the event structure.
Creating the Event Type Hierarchy

Functional security required to create and manage the Event Type Hierarchy

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and manage the Event Type Hierarchy</td>
<td>Master Definitions:</td>
</tr>
<tr>
<td></td>
<td>Event Frameworks = Can view, edit, deactivate, create and delete</td>
</tr>
</tbody>
</table>

Process

You create your Event Type Hierarchy by entering the first cabinet type and setting its data inheritance rules, then entering the folder types in that cabinet and each of their data inheritance rules, and finally entering each event type in the folder or cabinet and each of their data inheritance rules and associated reports and data properties.

To create your Event Type Hierarchy

1. Select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2  Create a cabinet type.
   a  Click , then click Cabinet Type to go to the Edit Cabinet Type page.

   b  Enter a name for the cabinet type.
   c  Click the “Edit” link.
   d  Set the data inheritance rules for Date/Time Constraints and Event Categories as you want them for this cabinet type. See “Inheritance rule options” on page 26.
   e  Click Create New Type.

3  Create the folder types within this cabinet type.
   a  Click Folder Type to go to the Edit Folder Type page.
   b  Enter a name for the folder type.
   c  Click the “Edit” link.
   d  Set the data inheritance rules for Date/Time Constraints, Event Categories, and Organizations as you want them for this folder type.
   e  Click Create New Type.
   f  If you want to create folder types within this folder, select your new folder type and repeat steps a - e.
   g  If you want to create additional folder types within the cabinet, select the cabinet type and repeat steps a - e.

Note  You also have the option of copying existing folder types as the basis for creating new folder types—with the folder type selected, click Copy to begin.
Create the event types within each folder type.

a With the folder type selected, click Event Type to go to the Edit Event Type page.

![Edit Event Type](image)

b Enter a name for the event type.

c If this is an academic event type, such as Section, select the vCal Processing option you want for events of this event type. See the Series25-SIS Interface v4.0 manual for information on vCal Processing options. [http://knowledge25.collegenet.com/display/CustomerResources/Series25+Interface+Documentation](http://knowledge25.collegenet.com/display/CustomerResources/Series25+Interface+Documentation)

d Click the “Edit” link below Inheritance Rules and set the data inheritance rules for each data type as you want them for this event type.

e If you want to associate reports with this event type, click the “Edit” link below Reports, select the Confirmation Notice and/or Invoice report you want as the default for this event type, then check the reports you want to associate with the event type. See “Associating reports and data properties with event types” on page 28.
If you want to associate categories, contact roles, custom attributes, requirements (publish to calendar), and/or requirements (other) with this event type, click the “Edit” link below each data type and select the data items you want to associate with the event type. See “The scheduler’s security group has at minimum “Can view all” Master Definitions: Event functional security rights.” on page 28.

5 Click Save Changes.

**Note** You also have the option of copying existing event types as the basis for creating new event types—with the event type selected, click Copy to begin.

6 Repeat step 4 for other event types.

7 Repeat steps 2 - 6 to add additional cabinet types, folder types, and event types.

Once you’ve completed your Event Type Hierarchy, you’re ready to create your event structure made up of cabinets and folders. For information on performing this task, see the information beginning on page 38.

**Note** The Manage Event Type Hierarchy page also includes the ability to deactivate/activate, copy, edit, and delete existing cabinet types, folder types, and event types. You can only delete cabinet types that don’t contain any folder types and/or event types. You can only delete folder types that don’t contain any folder types and/or event types.
Cabinets and folders

Description of cabinets and folders

25Live uses the concept of cabinets and folders to house and organize events in your Series25 database in a particular hierarchical structure, as shown in the illustration on page 19.

You decide for your scheduling environment what cabinets and how many you need, what folders and how many you need in each cabinet, and what types of events should be filed in each cabinet or folder.

The structure, data inheritance rules, and type properties you’ve defined in your Event Type Hierarchy control the cabinets, folders, and events in your event structure. See “The Event Type Hierarchy” starting on page 19 for detailed information on the Event Type Hierarchy and how to create it using the 25Live Administration Utility.

Purpose of cabinet and folder structure

Your event cabinet and folder structure:

- Lets 25Live know where to place new events and classes imported into the Series25 environment from your SIS
- Lets 25Live know which folders and events inherit which kinds of data, and the rules governing that data inheritance
- Allows you to control via object security who can create and update which cabinets and folders; for example, allowing some users to update particular cabinets and their folders, and allowing others view-only access to the same cabinets and folders.

See the 25Live Security Administration Guide, accessible by clicking Help, for information on setting object security on cabinets and folders.
Cabinets and folders

**Academic cabinet example**

In this event structure example, we’ve created a cabinet for 2013 Fall. Its cabinet type is “Semester.” Within the cabinet we’ve created a folder for each academic subject—ACCT, ACSC, ACST, and so on. Each will have classes for that subject in it.

![Academic cabinet example](image)

**Non-academic cabinet example**

Also in our event structure, we’ve created a cabinet for 2013 Special Events. Its cabinet type is “Special Event.” Within the cabinet we’ve created a folder for three special events scheduling entities—Administrative, External, and Student. Each will have events for that scheduling entity in it.

![Non-academic cabinet example](image)
Cabinet and folder date boundaries

When you create a cabinet, you must define its date boundaries. Date boundaries are the earliest and latest date any event within the cabinet can occur. For example, if the date boundaries of a Fall Term 2013 cabinet are September 15, 2013 through December 21, 2013, no event in that cabinet can begin before September 15, 2013 or end after December 21, 2013. You can set narrower date boundaries for folders within the cabinet as needed. For example, you could set the date boundaries of the Humanities folder to September 30, 2013 through December 10, 2013. The date boundaries of folders must be within the date boundaries of their cabinet.

Cabinet and folder date/time constraints

Cabinet and folder date/time constraints determine when events within a cabinet or folder can’t or shouldn’t occur. They are very useful in:

- Preventing users from scheduling events for periods when no events should occur, such as during holidays and breaks when the campus is closed.
- Warning users of special campus periods, such as commencement or homecoming, when they might not want to schedule competing events.

How cabinet/folder date/time constraints affect events

The date/time constraints inherited by an event from its cabinet or folder work together with the dates/times defined for the event to determine the actual dates/times of the event.

For example, the BIO301 class meets every Monday, Wednesday, and Friday at 9 a.m. from August 28, 2013 through December 15, 2013. The event has inherited several date/time constraints from the Fall 2013 cabinet that prevent classes from being scheduled on the following holidays: Labor Day, Columbus Day, and Thanksgiving (Thursday - Friday). When the date/time definition is created for the class, the occurrences that would fall on the constraint dates are automatically removed, as are their location and resource assignments. For example, there won’t be a location assignment for the Friday following Thanksgiving day occurrence.
Date/time constraints aren’t calculated into space utilization

Because they’re event-specific, date/time constraints aren’t calculated into space utilization. If you want to be sure constrained time on locations is accounted for in 25Live space utilization reports, set blackout dates on locations for campus holidays and other defined constraint dates/times.

For information on defining location blackouts, see page 64.

Constraint types

When you create a date/time constraint, you can choose one of two constraint types:

- Exclude
- Warning

An Exclude constraint identifies dates/times when events can’t occur. For example, you could define constraints that exclude events on Labor Day, Columbus Day, and the Thanksgiving holiday. These constraints would cause these days to be automatically excluded from the defined dates/times of events.

A Warning constraint allows schedulers to determine whether or not to schedule events during date/time constraint periods. When a location is assigned to an event with a warning attached, a message informs the scheduler that the event violates a constraint. The scheduler is free to decide whether to change the dates/times of the event or ignore the warning. For example, a warning constraint might be appropriate in a special events cabinet where you want to define a constraint for the Christmas holidays but also permit schedulers to use their discretion about scheduling an event for that time period. A concert might be appropriate, while an extension class might not. Another warning constraint might require that activities in the Continuing Education folder start only after 4 p.m. When a Spanish for Travelers class is saved to the folder with a Thursday meeting time from 3 p.m. to 6:30 p.m., a warning would be displayed.

Warning constraints are most useful for non-academic events where you want to leave it up to the scheduler to determine whether excluded dates/times actually apply to a particular event.
Guidelines for creating cabinets and folders

Follow these guidelines when creating cabinets and folders:

• Set the appropriate date range for each cabinet and folder. For example, your academic cabinets might reflect quarter or semester schedules. Nonacademic cabinets might be based on a calendar year, fiscal year, or term. Folders within a cabinet may have a shorter date range to reflect the scheduling restrictions of the subject or scheduling office.

• If you want particular groups of schedulers to schedule only in specific cabinets and/or folders or particular users to have update privileges for particular cabinets and/or folders, have your system administrator set up appropriate object security on those cabinets and folders for those groups. See the 25Live Security Administration Guide, accessible by clicking Help, for information.

• 25Live uses an internal default “routing rule” to determine which cabinet/folder to file each new or newly imported event in (where to store it in the database). It is highly recommended that you create a cabinet and folder structure that can use the default routing rule. To ensure this:

  • Don’t let the date ranges of like kinds of cabinets overlap. Make the date ranges unique and mutually exclusive. For example, don’t have your Winter Quarter 2013 cabinet start before your Fall Quarter 2013 cabinet ends, particularly if you have short courses that could fall into the overlap dates.

  • Make sure each folder in a particular area of your event structure has a unique organization associated with it. For example, don’t associate the Humanities organization with more than one folder in your Winter Quarter 2013 cabinet.

  • If you plan to have multiple overlapping terms represented in your cabinet structure, create appropriate term event categories and associate them with the appropriate folders within each cabinet.

For more information about the default event routing rule, see page 32.
• If you’ll be using the Schedule25 Optimizer to assign academic space, it’s recommended that you:
  • Create a folder for each of your academic subjects in each of your academic cabinets.
  • For each folder, associate the academic department as the sponsoring organization.
  • Set up your data inheritance rules in your Event Type Hierarchy so events in each folder inherit the sponsoring organization (department) of the folder. See “Data inheritance rules” on page 23.

Managing cabinets

Functional security required to manage cabinets

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
</table>
| Edit and create cabinets  | **Events:**  
  Event Access = Can view  
  Cabinets = Can view, edit and create |
| Copy cabinets             | **Events:**  
  Event Access = Can view  
  Cabinets = Can view, edit, create, and copy |
| Delete cabinets           | **Events:**  
  Event Access = Can view, edit, create, copy, and delete  
  Cabinet Delete = Can delete |
**Manage Cabinets**

- Use the **Manage Cabinets** task tab to:
  - Add new cabinets
  - Copy cabinets as the basis for creating new cabinets
  - Edit cabinets one by one or multiple cabinets simultaneously
  - Delete cabinets

**To add a cabinet**

1. With the Manage Cabinets task tab selected, find the cabinet type of the cabinet you’re adding by simple name search or by browsing your event structure. For example, if the cabinet you want to create should have a “Semester” cabinet type, you can either enter all or part of the word “semester” in the search field of Name Search or click the “Semester” cabinet type in Browse for Cabinets as shown here:

![Browse for Cabinets](image)

2. Use the calendar controls to specify the begin and end dates of the cabinet’s date range.

3. Click Add Cabinet. The new cabinet is created with a system-supplied name and highlighted.

4. Click Edit Cabinet(s).

5. Replace the system-supplied name with a name for the new cabinet.

6. To select the categories the cabinet belongs to (if any), click the Categories “EDIT” link and select the categories.

7. To define a date/time constraint for the cabinet, do the following:
   - a. Click the Constraints “EDIT” link.
   - a. Click New Constraint.
   - b. Enter a name for the constraint and select a constraint type.
   - c. Enter the constraint start date/time and end time and, if the time span of the constraint is greater than 24 hours, click the link icon and enter the end date.
   - d. If the constraint repeats, select and define the repeating pattern using the pattern definition controls.
Constraint Example:

![Constraint Example Image]

Note  As part of the adding process, you can specify the object security of the new cabinet. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing this task.

8 Click Save Changes.

To edit one or more cabinets

1 With the Manage Cabinets task tab selected, find the cabinet(s) you want to edit by simple name search.

2 Highlight the cabinet(s) you want to edit and click Edit. To highlight multiple cabinets, hold down the Ctrl key and click each cabinet.

If you choose to edit multiple cabinets, be aware that all and only the changes you make will be applied to all the cabinets you select for edit. When in doubt, edit cabinets one at a time.

3 If you highlighted one cabinet, edit its information as needed. Click the “EDIT” link to expand sections that are closed.

If you highlighted multiple cabinets, check the box of each data section you want to edit, and change the information as needed.

You can’t edit the cabinet type.
Note As part of the editing process, you can modify the object security of the cabinet. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing this task.

4 Click Save Changes.

To delete a cabinet

Deleting a cabinet deletes all the folders and events within it. Give Cabinet Delete functional security permission to only a few carefully selected “super users” or your functional administrator. See the 25Live Security Administration Guide, accessible by clicking Help, for information on setting functional security.

1 With the Manage Cabinets task tab selected, find the cabinet you want to delete by simple name search or by browsing your event structure.

2 Highlight the cabinet you want to delete and click Delete Cabinet.

3 Click Delete Cabinet to confirm.

4 Click Manage More Cabinets to return to the Manage Cabinets page.
Managing folders

Functional security required to manage folders

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>Events:</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit and create folders</td>
<td>Event Access = Can view</td>
<td>Folders = Can view, edit and create</td>
</tr>
<tr>
<td>Copy folders</td>
<td>Event Access = Can view</td>
<td>Folders = Can view, edit, create, and copy</td>
</tr>
<tr>
<td>Delete folders</td>
<td>Event Access = Can view, edit, create, copy, and delete</td>
<td>Folder Delete = Can delete</td>
</tr>
</tbody>
</table>

Manage Folders task tab

Use the Manage Folders task tab to:
- Add new folders
- Copy folders as the basis for creating new folders
- Edit folders one by one or multiple folders simultaneously
- Delete folders
To add a folder within a cabinet or another folder

1. With the Manage Folders task tab selected, find the cabinet or folder you want to add your new folder within by simple name search or by browsing your event structure. For example, if you want the folder you’re adding to be in the “2013 Fall” cabinet, you can either enter all or part of the cabinet name in the search field of Name Search or click the “2013 Fall” cabinet in Browse for Folders as shown here:

2. Click Add Folder. The new folder is created with a system-supplied name and highlighted.

3. Click Edit Folder(s).

4. Replace the system-supplied name with a name for the new folder.

5. If the folder’s date range is shorter than that of the cabinet or folder you’re adding the folder within, use the calendar controls to specify the begin and end dates of the folder’s date range.

6. To select the categories the folder belongs to (if any), click the Categories “EDIT” link and select the categories.

7. To define a date/time constraint for the folder, do the following:
   a. Click the Constraints “EDIT” link.
   a. Click New Constraint.
   b. Enter a name for the constraint and select a constraint type.
   c. Enter the constraint start date/time and end time, and if the time span of the constraint is greater than 24 hours, click the link icon and enter the end date.
   d. If the constraint repeats, select and define the repeating pattern using the pattern definition controls.

8. Click the Organizations “EDIT” link and search for the organization the folder is associated with. For example, if you’re adding a new English subject folder, you would search for and select the English department organization.
Managing folders

Note  As part of the adding process, you can specify the object security of the new folder. See the 25Live Security Administration Guide, accessibly by clicking Help, for information on performing this task.

9  Click Save Changes.

To copy one or more folders

1  With the Manage Folders task tab selected, find the folder(s) you want to copy by browsing your event structure.

2  Highlight the folder(s) and click Copy. To highlight multiple folders, hold down the Ctrl key and click each folder.

3  Choose the “parent” of your new folder(s) (the cabinet or folder you want your new folder to be in) from the drop-down list, then click Copy Folder(s).

To edit one or more folders

1  With the Manage Folders task tab selected, find the folder(s) you want to edit by simple name search.

2  Highlight the folder(s) you want to edit and click Edit. To highlight multiple folders, hold down the Ctrl key and click each folder.

3  If you highlighted one folder, edit its information as needed. Click the “EDIT” link to expand sections that are closed.

   If you highlighted multiple folders, check the box of each data section you want to edit, and change the information as needed.

   You can’t edit the folder type.

   Note  As part of the editing process, you can modify the object security of the folder. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing this task.

4  Click Save Changes.
To delete a folder

Deleting a folder deletes all the folders and events within it. Give Folder Delete functional security permission to only a few carefully selected “super users” or your functional administrator. See the 25Live Security Administration Guide, accessible by clicking Help, for information on setting functional security.

1. With the Manage Folders task tab selected, find the folder you want to delete by simple name search or by browsing your event structure.

2. Highlight the folder you want to delete and click Delete Folder.

3. Click Delete Folder to confirm.

4. Click Manage More Folders to return to the Manage Folders page.

Managing events

Functional security required to manage events

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
</table>
| Access the Manage Events task tab to bind contiguous (back-to-back) events, export events to the SIS, and/or delete events | Events:  
Event Access: Can view, edit, create, copy, and delete  
Events: Can view and edit  
Cabinets: Can view, edit and create  
Folders: Can view, edit and create  
Event Delete: Can delete  
Event Security: Can view and edit object security |

Manage Events task tab

Use the Manage Events task tab to:

- Bind contiguous (back-to-back) events
- Export events to your SIS, ignoring vCalendar To Dos
- Delete events
To bind contiguous events

Description of contiguous events

The 25Live Administration Utility allows you to create binding space assignment relationships among contiguous (back-to-back) events, indicating that the bound events require the same location assignment. You might use this functionality, for example, to ensure that instructors don’t have to change rooms when they have back-to-back classes. 25Live lets you define what you mean by contiguous on the Bind Contiguous Events page.

By default, events are considered contiguous if they satisfy these conditions:

• Have the same faculty member in the Instructor contact role (faculty members must be in this role, so need to be in the Series25 database)
• Are separated by no more than 10 minutes
• Have expected head counts that vary by no more than 50%

You can modify these conditions as needed before clicking Run Bind to bind the selected events.

Note Events that otherwise satisfy the conditions will not be bound if they already have an assigned location or if they have space preferences that are incompatible (that is, if there is no possibility that their space preferences might enable them to independently select the same location).

Procedure

1. With the Manage Events task tab selected, find the events you want to bind by simple name search or other search.

2. On the Manage Events page, check the box of each event you want to bind, then click Bind Contiguous.
3 Modify the conditions to specify what you mean by contiguous as needed.

4 Click Run Bind.

**To export events to your SIS**

This function lets you export events to your SIS outside the vCalendar To Do process.

1 With the Manage Events task tab selected, find the events you want to export to the SIS by simple name search or other search.

2 On the Manage Events page, check the box of each event you want to export to your SIS, then click Export to SIS, Ignore To Dos.

**To delete events**

1 With the Manage Event task tab selected, find the events you want to delete by simple name search or other search.

2 On the Manage Events page, check the box of each event you want to delete, then click Delete.

**Exporting data to X25**

After you’ve fully implemented your Series25 scheduling environment and have been using it in production for some time, you can use the 25Live Administration Utility to export data from your Series25 database to X25 for analysis, if you’ve licensed X25. Before you use this function, make sure you have thoroughly familiarized yourself with the information in the X25 Data Setup Guide available here:

http://knowledge25.collegenet.com/display/CustomerResources/X25+Documentation

The Export to X25 page of the 25Live Administration Utility (shown on the next page) is accessed by selecting the Events data tab, then selecting the X25 Export task tab. Follow the instructions on the page to accomplish the export.
Exporting data to X25
**Locations Data Administration**

**Location data**

**Definition of location**

The term *location* refers to any room or facility that could be assigned to an event in 25Live. This could include classrooms, auditoriums, playing fields, offices, theaters, and so on. One or more locations can be assigned to all or selected occurrences of an event.

**Types of location data you can store**

You can store a variety of information about each location:

- Name (required)
- Formal name
- Comments
- Maximum capacity (required)
- Fill ratio—the percentage of seats that should be filled by any event occupying the location; used in Schedule25 Optimizer processing
- Layouts—including capacity and fill ratio, and which is the default layout of the location
- Default setup instructions
- Partition—area of campus or type of location; used in Schedule25 Optimizer processing
- Features—physical features of the location
- Categories the location belongs to
- Attributes—any other location data you want to track
- Hours of availability—location open and close hours; schedulers can’t assign the location to events outside these defined hours unless they have override permissions to do so
- Blackout dates—specific dates/times the location is unavailable for assignment (for example, when it is undergoing repairs); schedulers can’t assign the location to events during these defined dates/times unless they have override permissions to do so
- Relationships—interdependencies with other locations; see “Location relationships” on page 56
Location example

This is an example of a location as it appears in 25Live. The location data was entered and the photograph selected in the 25Live Administration Utility when the location was created.

Note

Photographs must be in the image directory before you can select them for a location. See “Images Data Administration” on page 99.

Location master lists

Some location data comes from location master lists—comprehensive, relatively stable lists of location attributes you create before you create locations. You apply the appropriate items from these lists to each location.

<table>
<thead>
<tr>
<th>This location master list...</th>
<th>Is a list of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Categories</td>
<td>Ways you want to group locations for reporting and searching purposes</td>
</tr>
<tr>
<td>Location Custom Attributes</td>
<td>Additional location data you want to track</td>
</tr>
<tr>
<td>Location Features</td>
<td>Physical attributes of locations</td>
</tr>
<tr>
<td>Location Layouts</td>
<td>Physical arrangements locations may have</td>
</tr>
<tr>
<td>Location Partitions</td>
<td>Mutually exclusive location groupings used in Schedule25 Optimizer processing</td>
</tr>
</tbody>
</table>
Location master list example

This is an example of the Location Categories master list.

Location relationships

Location relationships allow you define the interdependencies that exist among locations on your campus, such as which locations should always be assigned together, which locations are subdivisions of other locations, which locations are close to other locations, and so on.

You can define any of the following relationships for a location:

<table>
<thead>
<tr>
<th>This relationship...</th>
<th>Defines...</th>
<th>For example...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Assign</td>
<td>Other locations that are also automatically assigned to an event when this location is assigned.</td>
<td>You want to ensure that when a particular auditorium is assigned to an event, the lobby adjacent to the auditorium is also automatically assigned to the event. To do this, you would specify that when the auditorium is assigned “also assign” the lobby.</td>
</tr>
</tbody>
</table>

Also Assign relationships aren’t reciprocal, so in this example the auditorium won’t be automatically assigned when you assign the lobby to an event. If the relationship doesn’t apply to certain event occurrences, the scheduler can remove the assignment of the lobby from one or more occurrences without removing the assignment of the auditorium to those occurrences.
<table>
<thead>
<tr>
<th>This relationship...</th>
<th>Defines...</th>
<th>For example...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Blocked By</strong></td>
<td>Other locations, that if already assigned for the same date and time, “block” (prevent) this location from being assigned.</td>
<td>You want to ensure that if an athletic field has been assigned to an event, the auditorium that shares the same parking lot can’t be assigned to an event meeting at the same date/time because parking is limited. To do this, you would specify that the auditorium is “blocked by” the athletic field.</td>
</tr>
<tr>
<td>Auditorium</td>
<td>Athletic Field</td>
<td></td>
</tr>
</tbody>
</table>

Blocked By relationships are reciprocal, so when you establish the relationship in one location, it also appears in the related location. In this example, the auditorium blocks the athletic field, and the athletic fields blocks the auditorium.

<table>
<thead>
<tr>
<th>This relationship...</th>
<th>Defines...</th>
<th>For example...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Close To</strong></td>
<td>Other locations that are close to this location. You determine what “close to” means.</td>
<td>You want to ensure that schedulers know which rooms are near a noisy music room to assist them in appropriate event location assignment. To do this, you would specify that the music room is “close to” several other rooms.</td>
</tr>
<tr>
<td>Music Room</td>
<td>Room A, Room B</td>
<td></td>
</tr>
</tbody>
</table>

Close To relationships are reciprocal, so in this example the Music Room is close to Room A, and Room A is close to the music room.
Divides Into relationships are reciprocal with Subdivision Of relationships, so in this example when you establish that the Ballroom divides into Ballrooms A, B, and C, each of the smaller locations is defined as a subdivision of the Ballroom. 25Live treats an event in any of the smaller locations as an event in the larger location, and vice versa.

In this example, users could potentially reserve any of these locations, if available:
- Ballroom (includes A, B, and C)
- Ballroom A
- Ballroom B
- Ballroom C
- Ballroom A/B
- Ballroom B/C

When you set up Divides Into relationships for a group of locations, it’s a good practice to also set up Close To relationships among them.
The **Locations** tab of the Administration Utility lets you perform these data administration tasks:

- Manage (create and edit) location master lists
- Manage (add, copy, edit, and delete) locations
- Remove pending location reservations

### Table: Subdivision Of

<table>
<thead>
<tr>
<th>This relationship...</th>
<th>Defines...</th>
<th>For example...</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Subdivision Of</strong></td>
<td>Locations that are part of a larger location and, therefore, when assigned to an event, prevent the larger location from being assigned for the same date and time. It would not prevent other subdivisions of the larger location from being assigned for the same date and time.</td>
<td>You want to ensure that when a subdivision of a larger ballroom is assigned to an event, the location(s) of which it’s a part can’t be assigned to an event meeting at the same date and time. Once you set up the Divides Into relationships among the Ballroom locations as shown in the previous example, the Subdivision Of relationships are established automatically.</td>
</tr>
</tbody>
</table>

Subdivision Of relationships are reciprocal with Divides Into relationships. See explanation on page 58.

---

**Locations tab**

The **Locations** tab of the Administration Utility lets you perform these data administration tasks:

- Manage (create and edit) location master lists
- Manage (add, copy, edit, and delete) locations
- Remove pending location reservations
Managing location master lists

<table>
<thead>
<tr>
<th>Functional security required to manage location master lists</th>
</tr>
</thead>
<tbody>
<tr>
<td>To be able to...</td>
</tr>
<tr>
<td>View and edit location master lists and deactivate, create, and delete items in them</td>
</tr>
</tbody>
</table>

Location master list task tabs

Use the appropriate location master list task tab—Categories, Custom Attributes, Features, Layouts, or Partitions— to add or update its associated master list.

Guidelines for adding location master lists

<table>
<thead>
<tr>
<th>When adding this master list...</th>
<th>Follow these guidelines...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location Categories</td>
<td>- Create categories that will make it easy for 25Live users to find and report on locations.</td>
</tr>
<tr>
<td></td>
<td>- Create categories that will assist in grouping events by assigned location.</td>
</tr>
<tr>
<td>Custom Attributes</td>
<td>- Create custom attributes that will allow users to provide additional needed location information.</td>
</tr>
<tr>
<td></td>
<td>- Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, Room Deposit ($).</td>
</tr>
</tbody>
</table>
When creating this master list... | Follow these guidelines...
---|---
Features |  - Don’t tie features to particular location types; for example, have a feature such as “Seating, Tiered,” not “Science Lab, Seating, Tiered.”
 |  - List only features that will be requested.
 |  - List only features that don’t exist in all locations.
 |  - Group features by name and type so users can easily find them; for example, “Board, Erasable, Large,” “Board, Erasable, Small,” and so on.
 |  - If you’re planning to use the Schedule25 Optimizer, check the Schedule25 box of each feature you want to include in Optimizer processing.
 |  - If you’re planning to use the Series25-SIS Interface, make sure to include all room attributes in your SIS identically in your Features master list.

Layouts |  - Use layout names that accurately describe the ways locations can be arranged.

Partitions |  - Use department location preferences to determine the partitions you need.
 |  - Which groups of locations, buildings, floors of building, areas of campus are preferred by each department?
 |  - Which locations share some common characteristic that is in demand by departments; for example, large lecture halls?
 |  - Remember that partitions are mutually exclusive location groupings; a location can be in only one partition.
To add or update a location master list

1. Click the task tab of the master list you want to add or update.
2. Add or update the list.

Note Be aware that all of the actions you take on the list (item additions/deletions, activates/deactivates, and Schedule25 designation) are made simultaneously when you click Update.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an item to the list</td>
<td>1. Click Add &lt;item&gt;.</td>
</tr>
<tr>
<td></td>
<td>2. Enter the item name in the space provided.</td>
</tr>
<tr>
<td></td>
<td>3. Choose the data type (custom attributes only).</td>
</tr>
<tr>
<td></td>
<td>4. Uncheck the Active box if you don’t want the item to be active at this time.</td>
</tr>
<tr>
<td>Activate or deactivate list items</td>
<td>Check or uncheck the Active box of each item.</td>
</tr>
<tr>
<td>Delete list items</td>
<td>Check the Delete box of each item.</td>
</tr>
<tr>
<td>Specify that you do or don’t want to use a feature in Schedule25 Optimizer processing (Features list only)</td>
<td>Check or uncheck the Schedule25 box of each feature.</td>
</tr>
</tbody>
</table>

3. Click Update <list>.
Managing Locations

Functional security required to manage locations

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit locations</td>
<td><strong>Locations:</strong> Location Access = Can view and edit, Location tab appears in 25Live</td>
</tr>
<tr>
<td>Add and copy locations</td>
<td><strong>Locations:</strong> Location Access = Can view, edit, and create, Location tab appears in 25Live</td>
</tr>
<tr>
<td>Delete locations</td>
<td><strong>Locations:</strong> Location Access = Can view, edit, and create, Location tab appears in 25Live Location Delete = Can delete</td>
</tr>
</tbody>
</table>

Manage Locations task tab

Use the Manage Locations task tab to:
- Add new locations
- Copy locations as the basis for creating new locations
- Edit locations one by one or multiple locations simultaneously
- Delete locations
To add a location

Guidelines for adding a location:

- Only Location Name and Max Capacity are required to add the location.
- If you’ll be using the Series25-SIS Interface, make sure the Location Name of each location that will be assigned to classes matches the location name in your SIS.
- Because the location name or formal name (depending on which has been specified in the 25Live Configuration Utility) appears in event web calendars you publish using the 25Live Publisher, make sure these names would make sense to the general public and comply with your location naming conventions.
- You may want to review your Location Layouts, Features, and Categories master lists and possibly add new items to them for selection here. Having good groupings can greatly assist 25Live users in finding locations on the Locations tab and in the Event Wizard. See “Managing location master lists” on page 60.
- Make sure to specify the hours of availability of the location to prevent unauthorized 25Live schedulers and the Schedule25 Optimizer from assigning the location to events outside the defined hours.
- Define blackout dates of the location as needed. To define a blackout date:
  a  Click New Blackout.
  b  Enter the blackout start date/time and end time (and if the time span of the blackout is greater than 24 hours, click the link icon and enter the end date).
  c  If the blackout repeats, select and define the repeating pattern using the pattern definition controls.
- If you’ll be scheduling the location using the Schedule25 Optimizer, select the Partition of the location and, optionally, enter a Fill Ratio (default seat fill ratio) for the location. (Non-Schedule25 Optimizer users can also specify a Partition and Fill Ratio if needed.) See the Schedule25 Optimizer User Guide, accessible by clicking Help, for information on how the Optimizer uses partitions and fill ratios in its class placement process.
• When specifying Layouts, Features, or Attributes of the location, you must check the box of the item to activate the data entry options for the item.

• If you’ll be using X25, provide values for the X25 custom attributes. When X25 functionality is installed, these attributes are automatically added to the Location Custom Attributes master list and made available for entry here.
  • X25 Assignable Area (required)
  • X25 Building (required)
  • X25 Owner Organization (required)
  • X25 Floor Number (optional)

See the X25 Data Setup Guide, available here, for more information:
http://knowledge25.collegenet.com/display/CustomerResources/X25+Documentation

• Define the relationship of this location to other locations as needed.
  
  To define a relationship:
  
  a Click New Relationship.
  
  b Select the kind of relationship (also assign, blocked by, close to, divides into, or subdivision of). See “Location relationships” on page 56.

  c Select the location that has this relationship.

Instructions for adding a location:

1 With the Manage Locations task tab selected, click the ADD icon to go to the Add Location page.

2 Enter or select the information that applies to the location. You must scroll down to see all the location information you can specify.

  Note As part of the adding process, you can specify the object security, assignment policy, and/or notification policy of the new location. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

3 Click Add Location.
To copy a location

1 With the Manage Locations task tab selected, click the COPY icon to go to the Add Location via Copy page.

2 Find the location you want to copy by simple name search, alphabetical index, grouping, or saved search.

   Note Selecting “All Locations” is not recommended because of the large amount of data that could be returned.

3 Highlight the location you want to copy, then click Copy.

4 Change the name of the location.

5 Edit other information for the new location as needed. Click the “EDIT” link to expand sections that are closed.

   Note As part of the copying process, you can modify the object security, assignment policy, and/or notification policy of the new location. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

6 Click Add Location.

To edit one or more locations

1 With the Manage Locations task tab selected, click the EDIT icon to go to the Edit Locations page.

2 Find the location(s) you want to edit by simple name search, alphabetical index, grouping, or saved search.

   Note Selecting “All Locations” is not recommended because of the large amount of data that could be returned.

3 Highlight the location(s) you want to edit and click Edit. To highlight multiple locations, hold down the Ctrl key and click each location. Locations you have permission to edit have a “Yes” in the Can Edit? column of the location list.

   Caution If you choose to edit multiple locations, be aware that all and only the changes you make will be applied to all the locations you select for edit. When in doubt, edit locations one at a time.

4 If you highlighted one location, edit its information as needed. Click the “EDIT” link to expand sections that are closed.

   If you highlighted multiple locations, check the box of each data section you want to edit, and change the information as needed. You must scroll down to see all data sections.
Note As part of the editing process, you can modify the object security, assignment policy, and/or notification policy of the location(s). See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

5 Click Save Changes.

To delete a location

Consider carefully before deleting a location, because when you do the location is completely erased from your Series25 database, including all past actions taken on the location (assignments to events, information edits, and so on), who performed them, and when. All information about the location, both past and present, no longer exists.

1 With the Manage Locations task tab selected, click the DELETE icon to go to the Delete Location page.

2 Find the location you want to delete by simple name search, alphabetical index, grouping, or saved search. You can only delete one location at a time.

   Note Selecting “All Locations” is not recommended because of the large amount of data that could be returned.

3 Highlight the location you want to delete, then click Delete.

4 Click Delete Location to confirm.

5 To delete other locations, click Delete Another Location. To return to the Manage Locations page, click Start Over.
Removing pending location reservations

Functional security required to remove pending reservations

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove pending location reservations</td>
<td>Security: Locks and Pending Reservations = Can view locked items and remove anyone’s locks</td>
</tr>
</tbody>
</table>

Remove Pending Location Reservations task tab

Use the **Remove Pending Location Reservations** task tab to remove pending reservations for locations.

What is a pending location reservation?

When a 25Live user is creating an event and assigns a location, a pending reservation (assignment) is created to hold that location while the user finishes creating the event. This is done to prevent conflicts that would occur if another user tried to schedule the same location at the same time.

If the user's browser crashes during the event creation process, the pending reservations are never discharged. The Administration Utility lets you view and remove these pending location reservations.

If you’re unsure whether or not a reservation is still active, don’t remove it.

To remove pending location reservations

With the Remove Pending Location Reservations task tab selected, highlight the reservation(s) in the list and click Remove Selected Reservations.
Resources Data Administration

Resource data

Definition of resource

The term *resource* refers to any equipment, service, personnel, supplies, or other item that could be assigned to an event. It includes items not already present in locations. One or more resources can be assigned to all or selected occurrences of an event, and specific resources can be set up to be automatically decremented when assigned.

<table>
<thead>
<tr>
<th>This could include...</th>
<th>Such as...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>• Audio visual equipment</td>
</tr>
<tr>
<td></td>
<td>• Laboratory equipment</td>
</tr>
<tr>
<td></td>
<td>• Vehicles</td>
</tr>
<tr>
<td>Services</td>
<td>• Food Services</td>
</tr>
<tr>
<td></td>
<td>• IT Support</td>
</tr>
<tr>
<td></td>
<td>• Maintenance</td>
</tr>
<tr>
<td></td>
<td>• Physical Plant/Facilities</td>
</tr>
<tr>
<td>Personnel</td>
<td>• AV Techs</td>
</tr>
<tr>
<td></td>
<td>• Security Officers</td>
</tr>
<tr>
<td></td>
<td>• Custodians</td>
</tr>
<tr>
<td>Supplies</td>
<td>• Catered items</td>
</tr>
<tr>
<td></td>
<td>• Conference materials</td>
</tr>
<tr>
<td></td>
<td>• Tables and Chairs</td>
</tr>
</tbody>
</table>

Difference between resources and requirements

Resources

Resources are event needs, such as equipment, services, and personnel, that are relevant to all or selected occurrences of an event. For example, a scheduler might assign a projector to just the first occurrence of a history class, but not to the other class meetings. Only resources can be set up to be automatically decremented when assigned to events.
Requirements
Requirements are event needs that are relevant to the event as a whole, such as a parking permit for an extension class, an alcohol permit for a theater reception, or a “Publish to Special Events Calendar” for a play. Requirements are often arranged well before an event takes place and aren’t specific to a date or time. They are defined in the Event Requirements (Calendar) and Event Requirements (Other) master lists as described on page 13, and can be set up to be displayed based on event type as described on page 28.

Resource example
This is an example of a resource as it appears in 25Live. The resource data was entered and the photograph selected in the 25Live Administration Utility when the resource was created.

Note  Photographs must be in the image directory before you can select them for a resource. See “Images Data Administration” on page 99.

Types of resource data you can store
You can store a variety of information about each resource:

- Name (required)
- Comments
- Default setup instructions
- Categories the resource belongs to
- Attributes—any other resource data you want to track
- Relationships—interdependencies with other resources; see “Resource relationships” on page 72
- Stock Totals for different time periods; see “Resource stock totals” on page 73
Some resource data comes from resource master lists—comprehensive, relatively stable lists of resource attributes you create before you create resources. You apply the appropriate items from these lists to each resource.

<table>
<thead>
<tr>
<th>This resource master list...</th>
<th>Is a list of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Categories</td>
<td>Ways you want to group resources</td>
</tr>
<tr>
<td>Resource Custom Attributes</td>
<td>Additional resource data you want to track</td>
</tr>
</tbody>
</table>

This is an example of the Resource Categories master list.

![Resource Categories](image-url)
Resource relationships define the interdependencies that exist among resources on your campus. They let you define which resources must always be scheduled together and which resources can be substituted for other resources.

You can define any of the following relationships for a resource:

<table>
<thead>
<tr>
<th>This relationship...</th>
<th>Defines...</th>
<th>For example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Assign</td>
<td>Other resources that are also automatically assigned to an event when this resource is assigned.</td>
<td>You want to ensure that when a van is assigned to an event, a van driver is also assigned. To do this, you would specify that when a van is assigned “also assign” a van driver.</td>
</tr>
<tr>
<td>Substitute With</td>
<td>Other resources that can be substituted for the requested resource.</td>
<td>You want to ensure that if a scheduler attempts to assign a van to an event and no vans are available, he/she is given the option of assigning a truck instead. To do this, you would specify that if a van is not available, “substitute with” a truck.</td>
</tr>
</tbody>
</table>

**Note** This is an FYI notice to the scheduler only. No automatic substitution occurs.
Resource stock totals

You can set one or more stock totals for each resource. Each stock total specifies the total inventory of the resource for a particular time period. For example, if your school has five vans in 2013, but plans to purchase two more vans by January 1, 2014 you might have the following stock totals:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Stock Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/13</td>
<td>12/31/13</td>
<td>5</td>
</tr>
<tr>
<td>1/1/14</td>
<td>12/31/14</td>
<td>7</td>
</tr>
</tbody>
</table>

Resources you’ve assigned stock totals to are automatically decremented when assigned to events. For example, if a scheduler assigns one van to an event occurring from 10:00 am to 3:00 pm on October 21, 2013, that assignment reduces the number of vans available on that day and time period to four. The stock total remains unchanged, but the available inventory is decremented.

You don’t have to assign stock totals to resources. If you don’t, the resource is not automatically decremented when assigned. For example, if you want to track the use of a resource that your school rents rather than owns, such as portable toilets, you might create a resource for it, but not enter a stock total. You might also decide you don’t want to decrement a resource for other reasons; for example, you want schedulers to be able to request a certain number of muffins for an event, but it may not make sense to have a muffin “inventory” decremented by that number when assigned.

Resources tab

The Resources tab of the Administration Utility lets you perform these data administration tasks:

- Manage (create and edit) resource master lists
- Manage (add, copy, edit, and delete) resources
- Remove pending resource reservations
Managing resource master lists

Functional security required to manage resource master lists

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and edit resource master lists and deactivate, create, and delete items in them</td>
<td>Master Definitions: Resource = Can view, edit, deactivate, create and delete</td>
</tr>
</tbody>
</table>

Resource master list task tabs

Guidelines for adding resource master lists

Use the appropriate resource master list task tab—Categories or Custom Attributes—to add or update its associated master list.

When adding this master list...

Follow these guidelines...

| Resource Categories | - Create categories that will make it easy for 25Live users to find and report on resources.  
|                     |   - Create categories that will assist in grouping events by assigned resource. |
| Custom Attributes   | - Create custom attributes that will allow users to provide additional needed resource information.  
|                     |   - If you want to associate images with resources, create an Image data type custom attribute.  
|                     |   - Give a visual hint, such as a dollar sign or a question mark, in the attribute label to indicate the type of data required; for example, Deposit for Use ($). |
Managing resource master lists

To add or update a resource master list

1. Click the task tab of the master list you want to add or update.

2. Add or update the list.

   **Note** Be aware that all of the actions you take on the list (item additions/deletions, activates/deactivates) are made simultaneously when you click Update.

3. Click Update <list>.

---

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an item to the list</td>
<td>1. Click Add &lt;item&gt;.</td>
</tr>
<tr>
<td></td>
<td>2. Enter the item name in the space provided.</td>
</tr>
<tr>
<td></td>
<td>3. Choose the data type (custom attributes only).</td>
</tr>
<tr>
<td></td>
<td>4. Uncheck the Active box if you don’t want the item to be active at this time.</td>
</tr>
</tbody>
</table>

| Activate or deactivate list items | Check or uncheck the Active box of each item.                                                          |

| Delete list items | Check the Delete box of each item.                                                                   |

4. Click Update <list>.
Managing resources

Functional security required to manage resources

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit resources</td>
<td><strong>Resources</strong>: Resource Access = Can view and edit, Resource tab appears in 25Live</td>
</tr>
<tr>
<td>Create and copy resources</td>
<td><strong>Resources</strong>: Resource Access = Can view, edit, and create, Resource tab appears in 25Live</td>
</tr>
<tr>
<td>Delete resources</td>
<td><strong>Resources</strong>: Resource Access = Can view, edit, and create, Resource tab appears in 25Live, Resource Delete = Can delete</td>
</tr>
</tbody>
</table>

Manage Resources task tab

Use the Manage Resource task tab to:

- Add new resources
- Copy resources as the basis for creating new resources
- Edit resources one by one or multiple resources simultaneously
- Delete resources
To add a resource

Guidelines for adding a resource:

• Only Resource Name is required to add the resource.

• Because the resource name may appear in event web calendars you publish using the 25Live Publisher, make sure the name would make sense to the general public and complies with your resource naming conventions.

• You may want to review your Resource Categories master list and possibly add new categories to it for selection here. Having good categories can greatly assist 25Live users in finding resources on the Resources tab and in the Event Wizard. See “Managing resource master lists” on page 74.

• When specifying Attributes of the resource, you must check the box of the attribute to activate the data entry options for the attribute.

• If you want to define the total inventory of the resource for different time periods that will cause the resource quantity to be decremented when assigned to events, specify stock totals:
  a. Click New Stock Level.
  b. Enter the start and end dates of the stock total period, then enter the stock level quantity.
  c. Repeat to add more stock totals for other time periods.

• Define the relationship of this resource to other resources as needed:
  a. Click New Relationship.
  b. Select the kind of relationship (substitute with or also assign).
  c. Select the resource that has this relationship.

Instructions for adding a resource:

1. With the Manage Resources task tab selected, click the ADD icon to go to the Add Resource page.

2. Enter or select the information that applies to the resource. You must scroll down to see all the resource information you can specify.

   Note: As part of the adding process, you can specify the object security, assignment policy, and/or notification policy of the new resource. See the Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

3. Click Add Resource.
To copy a resource

1. With the Manage Resources task tab selected, click the COPY icon to go to the Add Resource via Copy page.

2. Find the resource you want to copy by simple name search, alphabetical index, category, or saved search.
   **Note** Selecting “All Resources” is not recommended because of the large amount of data that could be returned.

3. Highlight the resource you want to copy, then click Copy.

4. Change the name of the resource.

5. Edit other information for the new resource as needed. Click the “EDIT” link to expand sections that are closed.
   **Note** As part of the copying process, you can modify the object security, assignment policy, and/or notification policy of the new resource. See the 25Live Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

6. Click Add Resource.

To edit one or more resources

1. With the Manage Resources task tab selected, click the EDIT icon to go to the Edit Resources page.

2. Find the resource(s) you want to edit by simple name search, alphabetical index, category, or saved search.
   **Note** Selecting “All Resources” is not recommended because of the large amount of data that could be returned.

3. Highlight the resource(s) you want to edit and click Edit. To highlight multiple resources, hold down the Ctrl key and click each resource. Resources you have permission to edit have a “Yes” in the Can Edit? column of the resource list.

4. If you highlighted one resource, edit its information as needed. Click the “EDIT” link to expand sections that are closed.

   If you highlighted multiple resources, check the box of each data section you want to edit, and change the information as needed.
Note As part of the editing process, you can modify the object security, assignment policy, and/or notification policy of the resource(s). See the Security Administration Guide, accessible by clicking Help, for information on performing these tasks.

5 Click Save Changes.

To delete a resource

Consider carefully before deleting a resource, because when you do the resource is completely erased from your Series25 database, including all past actions taken on the resource (assignments to events, information edits, and so on), who performed them, and when. All information about the resource, both past and present, no longer exists.

1 With the Manage Resources task tab selected, click the DELETE icon to go to the Delete Resource page.

2 Find the resource you want to delete by simple name search, alphabetical index, category, or saved search. You can only delete one resource at a time.

Note Selecting “All Resources” is not recommended because of the large amount of data that could be returned.

3 Highlight the resource you want to delete, then click Delete.

4 Click Delete Resource to confirm.

5 To delete other resources, click Delete Another Resource. To return to the Manage Resources page, click Start Over.
Removing pending resource reservations

Functional security required to remove pending reservations

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove pending resource reservations</td>
<td>Security: Locks and Pending Reservations = Can view locked items and remove anyone’s locks</td>
</tr>
</tbody>
</table>

Remove Pending Resource Reservations task tab

Use the Remove Pending Resource Reservations task tab to remove pending reservations for resources.

What is a pending resource reservation?

When a 25Live user is creating an event and assigns a resource, a pending reservation (assignment) is created to hold that resource while the user finishes creating the event. This is done to prevent conflicts that would occur if another user tried to schedule the same resource at the same time.

If the user's browser crashes during the event creation process, the pending reservations are never discharged. The Administration Utility lets you view and remove these pending resource reservations.

If you’re unsure whether or not a reservation is still active, don’t remove it.

To remove pending resource reservations

With the Remove Pending Resource Reservations task tab selected, highlight the reservation(s) in the list and click Remove Selected Reservations.
# Contacts Data Administration

## Contact data

### Definition of contact

The term *contact* refers to any person who uses 25Live to request or schedule events and/or is affiliated with a department or organization that sponsors events.

A contact may also be generic. For example, you could have a contact named “Student Congress President” regardless of the specific person occupying the position.

### Types of contact data you can store

You can store a variety of information about each contact:

- Name, title, and identification information—last name is required
- Email address(es)—work email address is required
- 25Live user identification and security group information, if the contact is an authorized 25Live user
- Work and home addresses
- Comments
- Organizations the contact is associated with
- Attributes—any other contact data you want to track
Contact Custom Attributes master list

Some contact data comes from your Contact Custom Attributes master list—a comprehensive, relatively stable list of additional data elements you want to track about contacts. You create this list before you create contacts and then apply the appropriate items from the list to each contact.

Contacts tab

The Contacts tab of the Administration Utility lets you perform these data administration tasks:

- Manage (create and edit) the Contact Custom Attributes master list
- Manage (add, copy, edit, and delete) contacts

Managing the Contact Custom Attributes master list

Functional security required to manage the Contact Custom Attributes master list

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
</table>
| View and edit the list and deactivate, create, and delete items in it | **Master Definitions:**  
  Contact = Can view, edit, deactivate, create and delete |
Managing the Contact Custom Attributes master list

**Custom Attributes task tab**

Use the **Custom Attributes** task tab to create or modify the Contact Custom Attributes master list.

**Guidelines for adding the Contact Custom Attributes master list**

- Create custom attributes that will allow users to provide additional needed contact information.
- Give a visual hint, such as a dollar sign or question mark, in the attribute label to indicate the type of data required; for example, First Aid/CPR Certified?

**To add or update the Custom Attributes master list**

1. Click the Custom Attributes task tab.
2. Add or update the list.
   - **Note** Be aware that all of the actions you take on the list (item additions/deletions, activates/deactivates) are made simultaneously when you click Update.
3. Click Update Attributes.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
</table>
| Add an attribute to the list | 1 Click Add Attribute.  
2 Enter the item name in the space provided.  
3 Choose the data type of the attribute.  
4 Uncheck the Active box if you don’t want the attribute to be active at this time. |
| Activate or deactivate attributes | Check or uncheck the Active box of each attribute. |
| Delete attributes       | Check the Delete box of each attribute.                                  |
Managing contacts

**Functional security required to manage contacts**

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit basic contact information</td>
<td><strong>Contacts:</strong> Contact Access = Can view and edit</td>
</tr>
<tr>
<td>Create and copy contacts who are not 25Live users</td>
<td><strong>Contacts:</strong> Contact Access = Can view, edit, and create</td>
</tr>
<tr>
<td>Create 25Live users and edit user information</td>
<td><strong>Contacts:</strong> Contact Access = Can view, edit, and create Security = Can view user lists, change security group permissions, assign members to groups, make users active or inactive, and create and delete security groups</td>
</tr>
<tr>
<td>Delete contacts</td>
<td><strong>Contacts:</strong> Contact Access = Can view, edit, and create Contact Delete = Can delete</td>
</tr>
</tbody>
</table>

**Note** 25Live users with functional security Contact Access = “Can view, edit, and create” can also create contacts who are not 25Live users in the 25Live Event Wizard.

**Manage Contacts task tab**

Use the **Manage Contacts** task tab to:

- Add contacts
- Copy contacts as the basis for creating new contacts
- Edit contacts one by one or multiple contacts simultaneously
- Delete contacts
To add a contact

Guidelines for adding a contact:

- Only Last Name and Work Email Address are required to add a contact.

- If the contact you’re adding is a 25Live user:
  a. Enter his/her username and password.
     Passwords can only contain letters, numbers, and underscores.
  b. Indicate whether the user is active (default) or inactive.
  c. Select the user’s security group.

- When specifying Attributes of the contact, you must check the box of the attribute to activate the data entry options for the attribute.

- Associate an organization with the contact as needed. To associate an organization:
  a. Click New Organization.
  b. Select the contact’s role in the organization, if any.
  c. Find and select the organization. If the contact is associated with other organizations, repeat these steps.

Instructions for adding a contact:

1. With the Manage Contacts task tab selected, click the ADD icon to go to the Add Contact page.

2. Enter or select the information that applies to the contact.
   
   **Note** You must scroll down to see all the contact information you can specify.

3. Click Add Contact.
To copy a contact

1. With the Manage Contacts task tab selected, click the COPY icon to go to the Add Contact via Copy page.

2. Find the contact you want to copy by simple name search or alphabetical index, highlight the contact, then click Copy.

3. Edit the information for the new contact as needed. Click the “EDIT” link to expand sections that are closed.

4. Click Add Contact.

To edit one or more contacts

1. With the Manage Contacts task tab selected, click the EDIT icon to go to the Edit Contacts page.

2. Find the contact(s) you want to edit by simple name search or alphabetical index.

3. Highlight the contact(s) you want to edit and click Edit. To highlight multiple contacts, hold down the Ctrl key and click each contact.

   If you choose to edit multiple contacts, be aware that all and only the changes you make will be applied to all the contacts you select for edit. When in doubt, edit contacts one at a time.

4. If you highlighted one contact, edit his/her information as needed. Click the “EDIT” link to expand sections that are closed.

   If you highlighted multiple contacts, check the box of each data section you want to edit, and change the information as needed.

5. Click Save Changes.

To delete a contact

Consider carefully before deleting a contact, because when you do the contact is completely erased from your Series25 database, including all past actions taken on the contact (event role designation, information edits, and so on), who performed them, and when. All information about the contact, both past and present, no longer exists.

1. With the Manage Contacts task tab selected, click the DELETE icon to go to the Delete Contact page.

2. Find the contact you want to delete by simple name search or alphabetical index, highlight the contact, then click Delete.

3. Click Delete Contact to confirm.
To delete other contacts, click Delete Another Contact. To return to the Manage Contacts page, click Start Over.
# Organizations Data Administration

## Organization data

### Definition of organization

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

### Types of organization data you can store

You can store a variety of information about each organization:

- Short name (required)
- Official title
- Abbreviation (Schedule25 key); only used in Schedule25 Optimizer class placement processing
- Type—academic department, student group, non-profit community organization, and so on
- Rating
- Accounting code
- Administrative and billing addresses
- Associated contacts
- Comments
- Categories the organization belongs to
- Attributes—any other organization data you want to track
- Partition preferences; used in Schedule25 Optimizer class placement processing
This is an example of an organization as it appears in 25Live. The organization data was entered in the 25Live Administration Utility when the organization was created.

### Organization master lists

Some organization data comes from organization master lists—comprehensive, relatively stable lists of organization attributes you create before you create your organizations. You apply the appropriate items from these lists to each organization.

<table>
<thead>
<tr>
<th>This organization master list...</th>
<th>Is a list of...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Categories</td>
<td>Ways you want to group organizations</td>
</tr>
<tr>
<td>Organization Custom Attributes</td>
<td>Additional organization data you want to track</td>
</tr>
<tr>
<td>Organization Types</td>
<td>The kinds of organizations and groups that may request, schedule, or sponsor events</td>
</tr>
<tr>
<td>Organization Ratings</td>
<td>Performance ratings organizations may have</td>
</tr>
<tr>
<td>Organization contact roles</td>
<td>Roles contacts may perform for an organization</td>
</tr>
</tbody>
</table>
Organization master list example

This is an example of the Organization Ratings master list.

![Organization Ratings Master List](image)

Organization partition preferences

To use the Schedule25 Optimizer, you must define and prioritize the partition preferences of each 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 and room types preferred by departments and organizations.

You can define up to four campus partition preferences for each organization—you must define at least one. Each preference can include one or more partitions from your Location Partitions master list. (See “Location master lists” on page 55.)

You must 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.

Organizations tab

The Organizations tab of the Administration Utility lets you perform these data administration tasks:

- Manage (create and edit) organization master lists
- Manage (add, copy, edit, and delete) organizations
Managing organization master lists

Functional security required to manage organization master lists

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>View and edit organization master lists and deactivate, create, and delete items in them</td>
<td>Master Definitions: Organization = Can view, edit, deactivate, create and delete</td>
</tr>
</tbody>
</table>

Organization master list task tabs

Use the appropriate location master list task tab—Categories, Custom Attributes, Types, Ratings, or Contact Roles—to add or update its associated master list.

Guidelines for adding organization master lists

When adding this master list... | Follow these guidelines...

Organization Categories
- Create categories that will make it easy for 25Live users to find and report on organizations.
- Create categories that will assist in grouping events by sponsoring organization.

Custom Attributes
- Create custom attributes that will allow users to provide additional needed organization information.
- Give a visual hint to indicate the type of data required; for example, Web Site (URL).

Types
- Use generic labels that describe the kinds of groups that might sponsor events on your campus.
- Keep in mind that you can assign only one type to each organization, so limit the number to a few mutually exclusive types—maximum of six is recommended.
To add or update an organization master list

1. Click the task tab of the master list you want to add or update.
2. Add or update the list.

Note: Be aware that all of the actions you take on the list (item additions/deletions, activates/deactivates) are made simultaneously when you click Update.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an item to the list</td>
<td>1. Click Add &lt;item&gt;.  2. Enter the item name in the space provided.  3. Choose the data type (custom attributes only).  4. Uncheck the Active box if you don’t want the item to be active at this time.</td>
</tr>
<tr>
<td>Activate or deactivate list items</td>
<td>Check or uncheck the Active box of each item.</td>
</tr>
<tr>
<td>Delete list items</td>
<td>Check the Delete box of each item.</td>
</tr>
</tbody>
</table>

3. Click Update <list>. 

When adding this master list...

Follow these guidelines...

| Ratings | • Define as many ratings as you need, but try to keep them high-level—maximum of six is recommended.  
  • Create ratings that will assist schedulers in accurately assessing an organization’s performance. |
| Contact Roles | • Create contact roles that are generic descriptions of jobs (example, Billing Contact), not job titles. |
Managing organizations

Functional security required to manage organizations

<table>
<thead>
<tr>
<th>To be able to...</th>
<th>You must be in a security group whose functional security is at minimum...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit organizations</td>
<td><strong>Organizations:</strong> Organization Access = Can view and edit</td>
</tr>
<tr>
<td>Create and copy organizations</td>
<td><strong>Organizations:</strong> Organization Access = Can view, edit, and create</td>
</tr>
<tr>
<td>Delete organizations</td>
<td><strong>Organizations:</strong> Organization Access = Can view, edit, and create</td>
</tr>
<tr>
<td></td>
<td>Organization Delete = Can delete</td>
</tr>
</tbody>
</table>

Note  
Users with functional security Organization Access = “Can view, edit, and create” can also create organizations in the 25Live Event Wizard.

Manage Organizations task tab

Use the Manage Organizations task tab to:
- Add new organizations
- Copy organizations as the basis for creating new organizations
- Edit organizations one by one or multiple organizations simultaneously
- Delete organizations
To add an organization

Guidelines for adding an organization:

- Only Organization Name is required to add the organization.
- If you’ll be using the Series25-SIS Interface, make sure Organization Name for each department matches a student code for an academic Department in your SIS; for example, “ENG” for the English department or “BIOL” for the Biology Department.
- Because the organization name may appear in event web calendars you publish using the 25Live Publisher, make sure the name would make sense to the general public and complies with your organization naming conventions.
- You may want to review your Organization Types and Categories master lists and possibly add new items to them for selection here. Having good types and categories can greatly assist 25Live users in finding organizations in the Event Wizard. See “Managing organization master lists” on page 91.
• When specifying Attributes of the organization, you must check the box of each attribute to activate the data entry options for the attribute.

• Associate contacts with the organization as needed. To associate contacts:
  a  Click New Contact.
  b  Select the contact’s role in the organization.
  c  Find and select the contact.
  d  Indicate whether or not this is the primary contact for the organization.
  e  Repeat steps a - d for each additional contact you want to associate with the organization.

**Instructions for adding an organization:**

1  With the Manage Organizations task tab selected, click the ADD icon to go to the Add Organization page.

2  Enter or select the information that applies to the organization. You must scroll down to see all the organization information you can specify.

**Note**  As part of the adding process, you can specify the object security and/or notification policy of the new organization. See the *Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.
To copy an organization

1. With the Manage Organizations task tab selected, click the COPY icon to go to the Add Organization via Copy page.

2. Find the organization you want to copy by simple name search, alphabetical index, grouping, or saved search.
   
   **Note** Selecting “All Organizations” is not recommended because of the large amount of data that could be returned.

3. Highlight the organization, then click Copy.

4. Change the name of the organization.

5. Edit other information for the new organization as needed. Click the “EDIT” link to expand sections that are closed.
   
   **Note** As part of the copying process, you can modify the object security and/or notification policy of the new organization. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.

6. Edit the partition preferences of the new organization as needed.

<table>
<thead>
<tr>
<th>To...</th>
<th>Do this...</th>
</tr>
</thead>
</table>
| Add a new partition preference group (organizations can have up to four partition preference groups prioritized highest to lowest, 1 to 4) | 1 Click New Preference Group.  
2 Check the partitions that you want in this partition preference group (you can choose as many as you want). |
| Edit the partitions in a partition preference group | Check and uncheck partitions as needed. |
| Remove a partition preference group | Click the Remove (red X) icon of the group. |
| Re-order partition preference groups to change their relative priority | Move partition preference groups up or down using the up/down arrow icons. |

7. Click Add Organization.
To edit one or more organizations

1. With the Manage Organizations task tab selected, click the EDIT icon to go to the Edit Organizations page.

2. Find the organization(s) you want to edit by simple name search, alphabetical index, grouping, or saved search.
   - **Note**: Selecting “All Organizations” is not recommended because of the large amount of data that could be returned.

3. Highlight the organization(s) you want to edit and click Edit. To highlight multiple organizations, hold down the Ctrl key and click each organization.

   If you choose to edit multiple organizations, be aware that all *and only* the changes you make will be applied to all the organizations you select for edit. When in doubt, edit organizations one at a time.

4. If you highlighted one organization, edit its information as needed. Click the “EDIT” link to expand sections that are closed.
   - If you highlighted multiple organizations, check the box of each data section you want to edit, and change the information as needed. You must scroll down to see all data sections.
   - **Note**: As part of the editing process, you can modify the object security and/or notification policy of the organization. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.

5. Edit the partition preferences of the organization as needed. For instructions, see step 6 on page 96.

6. Click Save Changes.

To delete an organization

Consider carefully before deleting an organization, because when you do the organization is completely erased from your Series25 database, including all past actions taken on the organization (designations as an event’s primary organization, information edits, and so on), who performed them, and when. All information about the organization, both past and present, no longer exists.
1 With the Manage Organizations task tab selected, click the DELETE icon to go to the Delete Organization page.

2 Find the organization you want to delete by simple name search, alphabetical index, grouping, or saved search.

   **Note** Selecting “All Organizations” is not recommended because of the large amount of data that could be returned.

3 Highlight the organization, then click Delete.

4 Click Delete Organization to confirm.

5 To delete other organizations, click Delete Another Organization. To return to the Manage Organizations page, click Start Over.
Images Data Administration

Images tab

The Images tab lets you create and manage a “library” of location and resource photographs and layout diagrams that can be associated with locations and resources.

Note If you want to associate images with resources, in addition to adding resource images to this library, you must also set up an Image data type resource custom attribute (see “Guidelines for adding resource master lists” on page 74).

Adding images

Add Image task tab Use the Add Image task tab to add images.

To add an image

1 With the Add Image task tab selected, enter a name for the image and browse to and select the image.

2 Indicate whether the image is a photograph or a diagram.

3 Enter a description of the image (optional).

4 Click Add Image.
Managing images

**Manage Images task tab**

Use the Manage Images task tab to:

- Edit images
- Delete images

**To edit an image**

1. With the Manage Images task tab selected, click Photographs or Diagrams depending on which type of image you want to edit.

2. Highlight the image in the list (you see the current image on the right), and click Edit.

3. Change the image name, browse to and select a different image, change the image type, and/or edit the image description as needed.

4. Click Save Changes.

**To delete an image**

1. With the Manage Images task tab selected, click Photographs or Diagrams depending on which type of image you want to delete.

2. Highlight the image in the list (you see the current image on the right), and click Delete.

3. Click Delete Image.