Data Administration Guide

The 25Live Administration Utility

The data administration tasks you can perform

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

- Create and maintain cabinets, folders, locations, resources, contacts, and organizations
- Manage events—delete multiple events, bind back-to-back events, complete vCalendar To Do’s for multiple events and export the events to your SIS, force selected events to inherit data from their parent folder or cabinet
- Add and maintain event, location, resource, contact, and organization master definitions
- Add and manage images
- Specify event publishing, e-commerce, accounting, SIS interface, single sign-on, and automatic email options
- Remove pending location and resource reservations
- Create and manage the Event Type Hierarchy
- Export data to X25
- View Series25 import messages

The 25Live Administration Utility also allows you 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."
- Access and run the Schedule25 Optimizer. For information, see the *Schedule25 Optimizer User Guide* available by clicking Help and choosing "Schedule25 Optimizer User Guide."
- 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."

Utility data administration tabs

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

- Events
- Locations
- Resources
- Contacts
- Organizations
- Images
- Integration

Events

The ***Events*** tab provides functionality to allow you to:

- Maintain event master definitions: Categories, Custom Attributes, Contact Roles, Requirements (Calendar), and Requirements (Other)
- Create and maintain the Event Type Hierarchy
- Add new cabinets and folders
- Copy folders as the basis for creating new folders
- Edit one or more cabinets and folders
- Delete cabinets and folders
- Delete events
- Bind back-to-back events
- Complete vCalendar To Do's for multiple events and export the events to your SIS.
- Force folders and events to inherit data from their parent folder or cabinet
- Export data to X25
- View Series25 import messages from the legacy Series25-SIS (TCS) Interface
- If you have licensed the events.csv web service, import events into 25Live from any non-SIS third party data source

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 for 25Live security groups

Locations

The ***Locations*** tab provides functionality to allow you to:

- Maintain location master definitions: 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

The ***Resources*** tab provides functionality to allow you to:

- Maintain resource master definitions: 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

Contacts

The ***Contacts*** tab provides functionality to allow you to:

- Maintain the Contact Custom Attributes master definition
- Add new contacts
- Copy contacts as the basis for creating new contacts
- Edit one or more contacts
- Delete contacts

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

- Add and manage 25Live users
- Activate and deactivate 25Live users
- See which users are currently logged into 25Live
- View the login history of 25Live users

Organizations

The ***Organizations*** tab provides functionality to allow you to:

- Maintain organization master definitions: Categories, Custom Attributes, Types, Ratings, and Contact Roles
- Add new organizations
- Copy organizations as the basis for creating new organizations
- Edit one or more organizations
- Delete organizations

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 and notification policies for specific organizations by 25Live security groups.
- Set default object security access to organizations for 25Live security groups

Images

The ***Images*** tab provides functionality to allow you to add and manage images.

Reports

The ***Reports*** tab provides functionality to allow you to schedule the automatic generation and delivery of reports.

This tab also allows you to set default object security for reports as described in the *25Live Security Administration Guide* and integrate custom reports into your 25Live environment as described in *25Live Custom Reports Integration*.

Integration

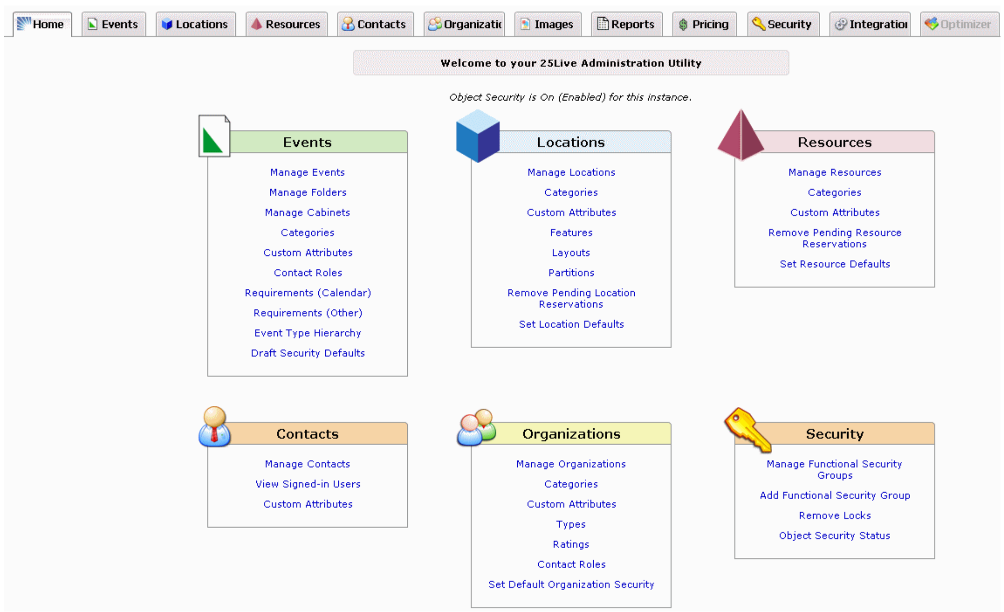
The ***Integration*** tab provides functionality to allow you to:

- Set 25Live Publisher options
- Set legacy Series25-SIS (TCS) interface import/export options
- Set up one or more instances of 25Live accounting
- Set security group options for third-party authentication
- Enable or disable automatic email notifications and, if enabled, set up automatic email notifications for each security group.

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.



Note: Notice that the Home page also indicates whether object security is on (enabled) or off (disabled) for this 25Live instance.

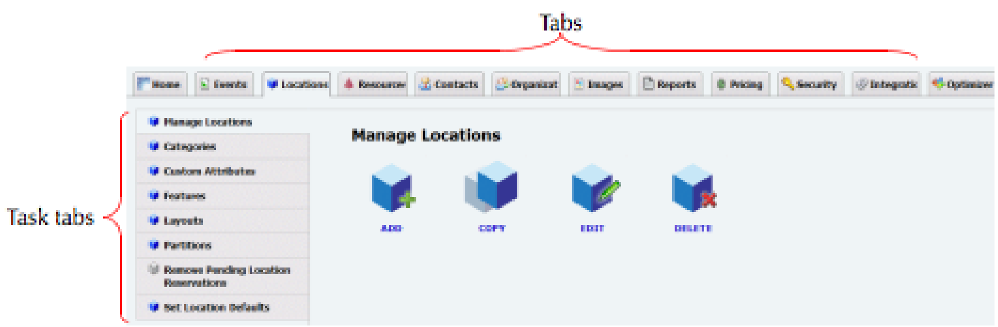
Using the Administration Utility

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, Images, and Integration data type options.
   or
   From the Events, Locations, Resources, Contacts, Organizations, Images, or Integration 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.

Accessing previous versions of this guide

If you're using an earlier release of 25Live and want to access the Data Administration Guide 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 appropriate link.

25Live Data Preparation

If you're a new Series25 customer, read the following information 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 information and use the remainder of this guide as a reference 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.

- Learn about the location data that can be created in your Series25 environment. See "Location data"
- Add master definition items that define locations. See "Managing location master definitions"
- Create locations. See"Managing Locations"

Step 2: Prepare resource data

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

- Learn about the resource data that can be created in your Series25 environment. See "Resource data"
- Add master definition items that define resources. See "Managing resource master definitions"
- Create resources. See "Managing resources"

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.

- Learn about the contact data that can be created in your Series25 environment. See "Contact data"
- Add Contact Custom Attributes master definition items. See "Managing the Contact Custom Attributes master definition"
- Create contacts. See "Managing contacts"

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, and/or sponsor events.

- Learn about the organization data that can be created in your Series25 environment. See "Organization data"
- Add master definition items that define organizations. See "Managing organization master definitions"
- Create organizations and associate contacts with them. See "Managing organizations"

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 building the event structure.

- Learn about the event data that can be created in your Series25 environment. See "Event data"
- Add master definition items that define events. See "Managing event master definitions"
- Learn about the Event Type Hierarchy that defines your event structure. See "The Event Type Hierarchy"
- Create the Event Type Hierarchy. See "Event Type Hierarchy Guidelines" and "Creating the Event Type Hierarchy"
- Learn about the event structure (cabinets and folders) used to house and organize events. See "Cabinets and folders" and "Guidelines for creating cabinets and folders"
- Create cabinets. See "Managing cabinets"
- Create folders. See "Managing folders"

Events Data Administration

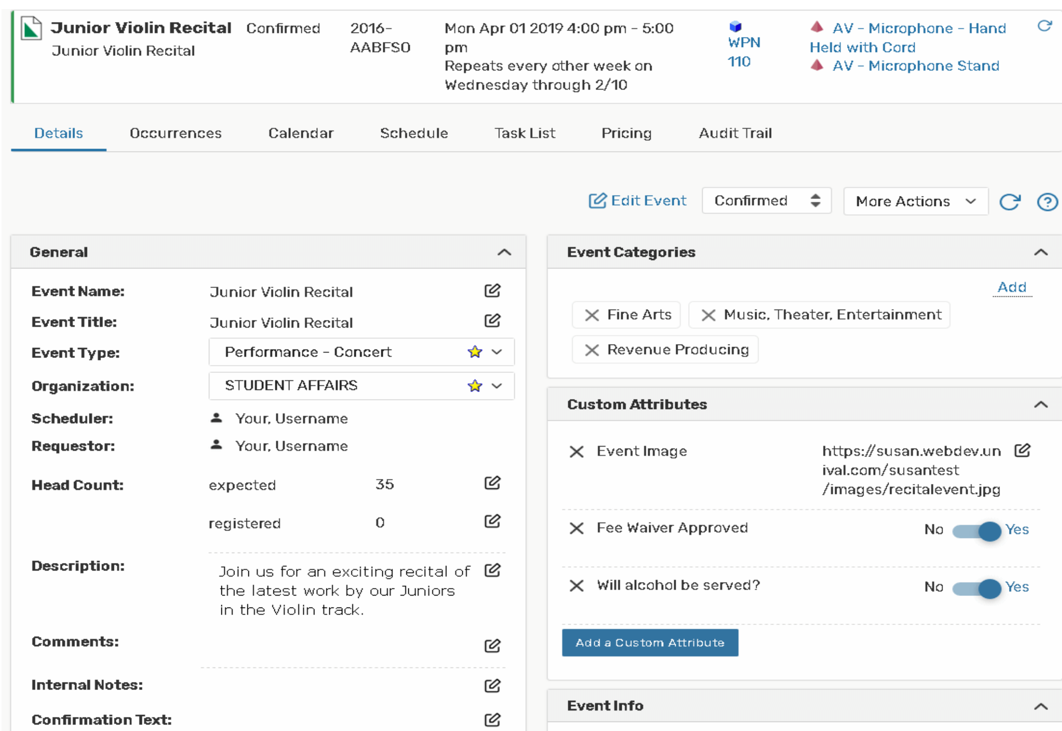
Event data

Definition of event

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

Event example

Here's an example of an event in 25Live Pro showing some of its information.



Events tab

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

- Manage event master definitions
- Create and manage your Event Type Hierarchy
- Add and manage cabinets
- Add and manage folders
- Manage events—delete multiple events, bind back-to-back events, complete vCalendar To Do's for multiple events and export the events to your SIS, force events to inherit data from their parent folder or cabinet

Note: Using the Administration Utility to bind back-to-back events and complete vCalendar To Do's is applicable only if you are using the legacy Series25-SIS Interface (TCS) Interface. It does not apply if you are using the Series25 LYNX Interface.

- Export data from your Series25 database to X25 for analysis
- View Series25 import messages from the legacy Series25-SIS (TCS) Interface
- If you have licensed the events.csv web service, import events into 25Live from any non-SIS third party data source (such as Outlook)

Event master definitions

Description of event master definitions

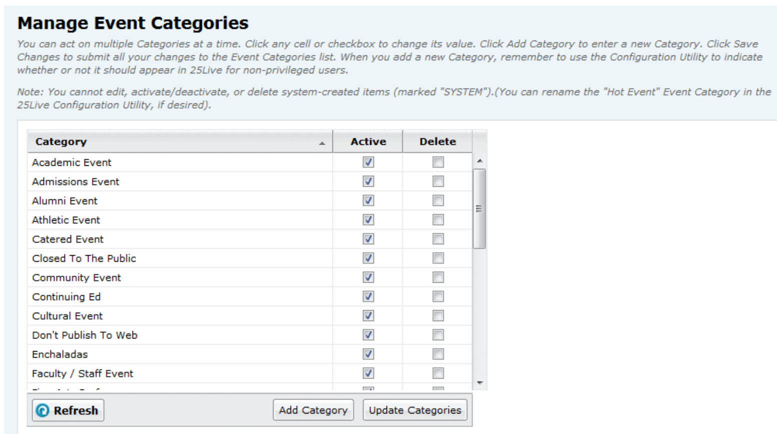
Some event data comes from event master definitions—comprehensive, relatively stable lists of event attributes. Those creating events apply the available and appropriate items from these lists to each event.

This event master definition...	***Is a list of...***
Event Categories	Ways you want to group events, such as Academic, Athletic, Community, and so on, that you want to make readily available in 25Live.
Event Custom Attributes	Additional data elements you want to track about events that you want to be more "behind the scenes" in 25Live. See *"Custom attributes"*.
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.

This event master definition...	*Is a list of...*
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 definition example

This is an example of the Event Categories master definition:



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 definition list (as described previously for the Event Custom Attributes master definition) and then applied to individual events, locations, resources, contacts, and organizations as needed. There are also a number of system-supplied custom attributes that can't be edited or deleted, but can be deactivated (see *"System-supplied event master definition items"*).

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 Pro or 25Live Scheduling, or a location, resource, contact, or organization in the 25Live Administration Utility.

This data type...	*Limits data entry to...*	*And requires users to...*
Boolean	Yes/No condition	Select Yes or No.
Contact	A valid 25Live contact name	Select a contact.

This data type...	*Limits data entry to...*	*And requires users to...*
Date	Date only	Type or select a date.
Date Time	Date and time	Type or select a date and time.
Floating Point	A number which may have a decimal	Type a number that may have a decimal.
Image	Path name to an image file	Browse and select an image file.
Integer	A whole number	Type a whole number.
Location	A valid 25Live location name	Browse and select a location.
Long Text	Long text or other alphanumeric characters (no maximum number of characters)	Type text and/or other alphanumeric characters.
Organization	A valid 25Live organization name	Browse and select an organization.
Resource	A valid 25Live resource name	Browse and select a resource.
Text	Text and/or other alphanumeric characters (maximum 80 characters)	Type text and/or other alphanumeric characters.
Time	Time only	Type a time.
URL	A URL	Type (or copy and paste) a URL.

Managing event master definitions

Required functional security

Functional security required to manage event master definitions:

Searches and Master Definitions: Event = Can view, add and edit active and inactive master definitions.

Event master definition task tabs

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

Note: Any legacy requirements your school used in R25 appear in the Requirements (Other) master definition.

System-supplied event master definition items

25Live includes a number of system-supplied event master definition items marked "[SYSTEM]" and grayed out. These items can't be edited or deleted, but can be deactivated They include the following

Guidelines for adding event master definition items

Master Definition	***Item***	***Purpose***
Event Categories	Publish to vCalendar	(not currently in use)
	Hot Event	Used by the system as the criterion for the default search displayed to non-signed in users.
Event Custom Attributes	Allow Registration	(not currently in use)
	Conflict Decider	(not currently in use)
	Detail Image	Used to specify a URL to appear in 25LIve Publisher calendar event detail views.
	E-Commerce Link Label	(not currently in use)
	Event Image	Used to specify a URL to appear in 25Live Publisher calendar spuds that include images (most often thumbnails).
	Hot Event Image	(not currently in use)
	Register Here	(not currently in use)
	Registration	(not currently in use)
	SIS Bound Reservation Missing	Used by the system to designate cross-listed classes whose associated cross-listed group members were not imported into 25Live by the asynchronous vCalendar import process.
	WDYT Event Survey	(not currently in use)
	Web Site	Used to specify the URL of an event's promotional website.
	X25 CIP Code	(not currently in use)
Event Contact Roles	Instructor	Used to designate the instructor of a class. If the Series25-SIS Interface is configured to import instructors, it will populate this event role automatically.
	Requestor	Used to designate the name of the 25Live user who created an event or event draft.

Master Definition	Item	Purpose
	Scheduler	Used to designate the name of the 25Live user who created an event or event draft. If a default scheduler has been specified in the 25Live Configuration Utility, the system automatically enters that name in this role.

When adding items for this master definition...	Follow these guidelines...
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 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.
Requirements (Other)	Think of items that apply to the overall event. Determine which requirements you want to allow users to enter a quantity of when creating an event. Remember that quantities of requirements aren't automatically decremented. If you need decrementing, create a resource instead. See *"Resources Data Administration"*.

	Event type properties Event custom attributes, contact roles, and requirements (Calendar and Other) only appear for selection when creating an event using the 25Live Pro Event Form if they were selected as properties of the event's event type. See *"Associating reports and data properties with event types"*. Their appearance is also controlled by the selections made in the 25Live Configuration Utility which determine what users in security groups with "Can view abridged list of items managed in the Config Utility" Searches and Master Definitions functional security can see. See the *25Live Configuration Utility* document, accessible by clicking Help from the Configuration Utility, for more information.

Adding or updating items in an event master definition

1. Click the task tab of the master definition you want to add items to and/or update items in.
2. Add or update the items.

Note: Be aware that all of the updates you make (item additions/deletions, label changes, activates/deactivates) are made simultaneously when you click Save Changes.

To...	***Do this...***
Add an item	***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.
Edit an item label	***1*** Click the item to make it editable. ***2*** Use the arrow keys to position your cursor where you want to make changes. ***3*** Backspace as needed to delete characters. Enter characters as needed.
Activate or deactivate items	Check or uncheck the Active box of each item.
Delete items	Check the Delete box of each item.

3 Click Update <master definition>.

Note: For the Event Requirements (Calendar) and Event Requirements (Other) master definitions, 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.

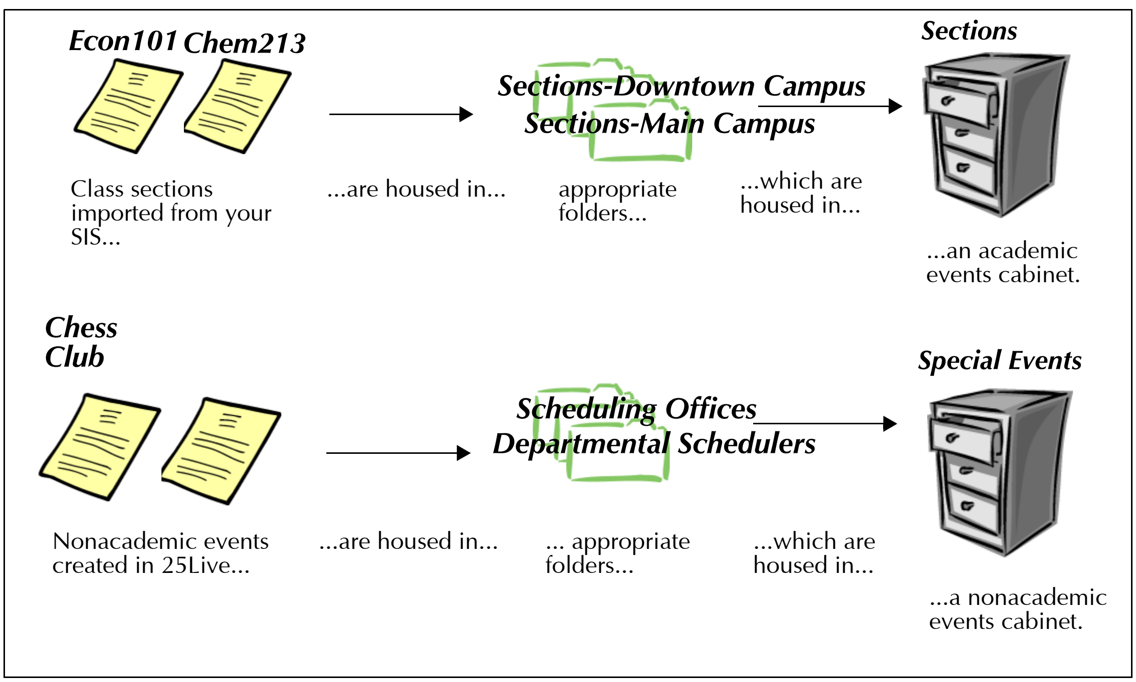
The Event Type Hierarchy

Creating the Event Type Hierarchy

The following information describes 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, rename, and delete existing cabinet types, folder types, and event types as needed. (See *"Modifying your Event Type Hierarchy"*.)

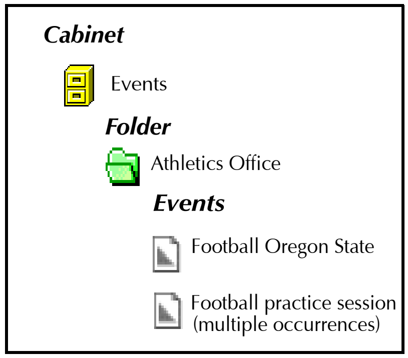
Description of Event Type Hierarchy

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 in this example:



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 portion 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 a "Special Events" cabinet type, an "Athletics" folder type, and "Game" and "Practice Session" event types.

Purpose of the Event Type Hierarchy

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

- To streamline scheduling activities by allowing you to specify reports and data properties of events by event type
- To allow 25Live to properly route new SIS classes imported into your Series25 database
- To reflect your scheduling environment and business processes

Event Type Hierarchy portions

Each portion of the Event Type Hierarchy is composed of:

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

Cabinet types

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

Folder types

Folder types are mid-level components of each portion of the Event Type Hierarchy. They are the "containers" for event types.

Event types

Event types are the lowest-level components of each portion of the Event Type Hierarchy. They don't "contain" anything, but are contained in folder types and/or cabinet types. Every 25Live event must have an event type.

Example

Here is an example of a very simple Event Type Hierarchy which effectively groups academic and non-academic events.

All Events (cabinet type)

- Imported Sections (folder type)
  - Section (event type)
- Special Events (folder type)
  - Meeting (event type)
  - Workshop (event type)
  - Party (event type)
  - Performance (event type)

Associating reports and data properties with event types

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 its 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 Pro Event Form if either of these conditions is met:

- The data property (with the exception of Categories, see note below) has also been selected for display in the 25Live Configuration Utility and the scheduler's security group has "Can view abridged list of master definitions" Searches and Master Definitions: Event functional security rights.
- The scheduler's security group has at minimum "Can view and add active master definitions" Searches and 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.

Note: The exception to the above is Event Categories where those selected for the event type are automatically “checked” in the Event Form, but all additional categories are available for selection by the scheduler.

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

This property...	***Defines...***
Categories	The default event categories of the event type. Once associated with an event type, the selected categories are automatically “checked” (selected) in the 25Live Pro Event Form for new events of that type, but all other categories are also available for selection.
Contact Roles	The event roles you want to track for the event type. Once assigned to an event type, the selected role labels are automatically displayed for selection in the 25Live Pro Event Form for new events of that type. The scheduler can then indicate who will be performing each of the selected roles for a particular event.
Custom Attributes	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 the 25Live Pro Event Form for new events of that type. The scheduler can then enter appropriate values for each of the selected custom attributes for a particular event.
Requirements (Publish to Calendar)	The default “Calendar” publishing requirements of the event type. Once associated with an event type, the selected requirements are automatically displayed for selection in the 25Live Pro Event Form for new events of that type.
Requirements (Other)	The default “Other” requirements of the event type. Once associated with an event type, the selected requirements are automatically displayed for selection in the 25Live Pro Event Form for new events of that type.

For example, “Meeting” events might have properties like:

Property	***Value***
Categories	(none)
Custom Attributes	If Canceled, Notify Special Needs
Contact Roles	Requestor Scheduler Facilitator
Requirements (Publish to Calendar)	Publish to Administrative Calendar
Requirements (Other)	Department Approval

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 custom attributes and contact roles and must be associated with event types to have them appear in the Event Form.

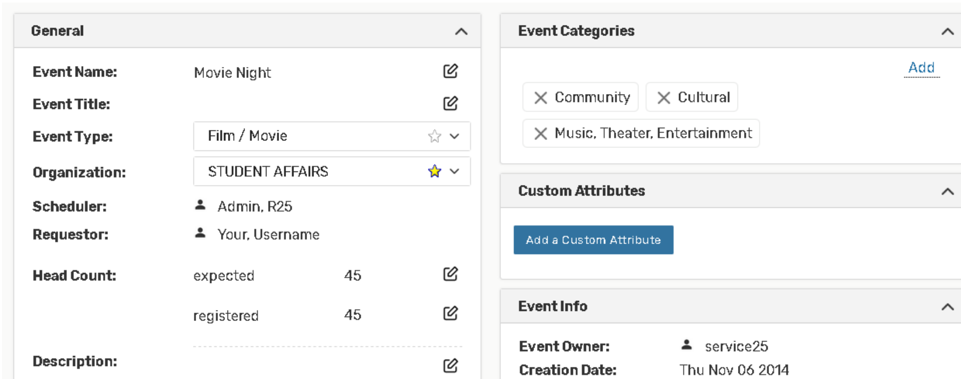
Guidelines for associating data groups with event types

In associating event categories, custom attributes, contact roles, 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 custom attributes to ensure that schedulers supply the additional information needed for different types of events—so, for example, those who schedule outdoor athletic events have a place to indicate if an event will be “Cancelled in case of bad weather.”
- 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 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 Pro Event Form

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



Note: If there are selected categories they are "checked" (selected), but all other event categories are available for selection by the scheduler.

Event Type Hierarchy Guidelines

Guidelines

In creating your Event Type Hierarchy:

- Take the time before hand to read this very helpful "25Live-oriented Event Structures" article available here: *http://knowledge25.collegenet.com/display/Series25/25Live-oriented+Event+Structures*
- Make sure each portion of your Hierarchy is complete and accurate to minimize the need to change it later.
- Build your Hierarchy to take maximum advantage of the default event routing rule used to route newly imported classes into the Series25 database. See *"The default routing rule"*
- Start small and add complexity later, if necessary; for example, create one cabinet type with academic and special events folder types. Add additional folder types later if needed.
- 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. Security and location assignment policies handle locations.

Examples

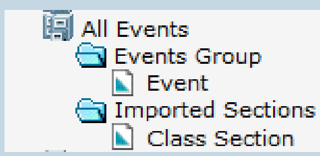
Starting below are examples of Event Type Hierarchies for scheduling environments that require maximum simplicity, a little more complexity, or maximum complexity. None require a complicated Event Type Hierarchy. The type names used are only examples. You should name your types appropriately for your scheduling environment.

Maximum simplicity

If your institution is small with mostly centralized scheduling, you need only a very simple Event Type Hierarchy like the one described in this example.

- An "All Events" cabinet type
- Within the cabinet type, two folder types—one for grouping sections imported from your SIS ("Imported Sections") and one for grouping non-academic events ("Events Group").
- Within the Imported Sections folder type, a "Class Section" event type, and within the Events Group folder type, an "Event" event type.

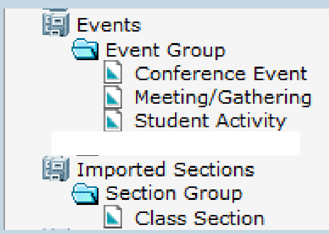
This hierarchy identifies all events in the system as either imported sections or manually scheduled events.



A little more complexity

If your institution is mid-sized with fairly centralized scheduling, you might consider a slightly more complex Event Type Hierarchy such as the one described in this example.

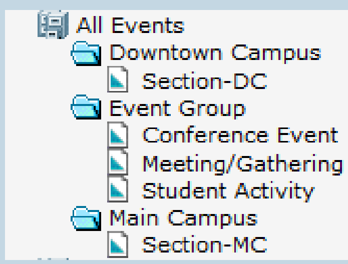
- An “Imported Sections” cabinet type and an “Events” cabinet type
- Within the “Imported Sections” cabinet type, a “Section Group” folder type
- Within the “Events” cabinet type, an “Event Group” folder type
- Within the “Section Group” folder type, a “Class Section” event type
- Within the “Event Group” folder type, as many event types as you need (Meeting/Gathering, Student Activity, Conference Event, and so on)—a collectively agreed upon list for use by all schedulers



Maximum complexity

If your institution is large with mostly decentralized scheduling and multiple campuses, you will probably need a more complex Event Type Hierarchy such as the one described in this example.

- An "All Events" cabinet type
- Within the cabinet type, a folder type for each campus ("Downtown Campus," "Main Campus," and so on) to group imported academic sections by campus and a folder type for grouping non-academic events ("Event Groups")
- Within each campus folder type, a single event type that represents sections for each campus code in your SIS (Section-DC, Section-MC, and so on).
- Within the "Event Groups" folder type, as many event types as you need (Meeting/Gathering, Student Activity, Conference Event, and so on)—a collectively agreed upon list for use by all schedulers



Creating the Event Type Hierarchy

Required functional security

Functional security required to create and manage the Event Type Hierarchy:

Cabinets and Folders: Event Type Hierarchy = Can view, edit, deactivate, create and delete

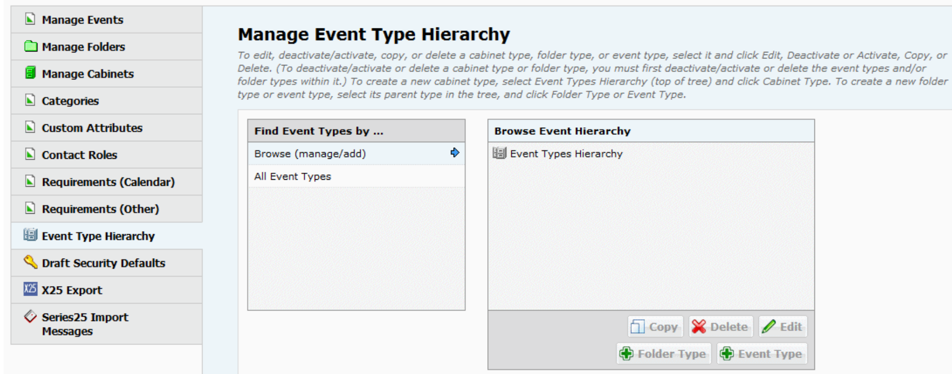
Process

You create your Event Type Hierarchy by entering the first cabinet type, then entering the folder types in that cabinet type, and finally entering each event type in the folder type or cabinet type and each of their associated reports and data properties. You repeat this entire process for each cabinet type/folder type/event type portion of the Hierarchy.

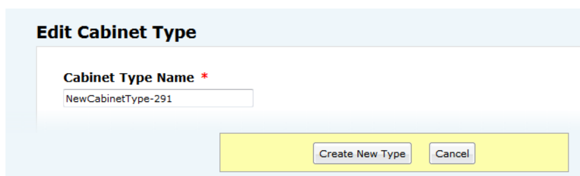
Note: Type names must be unique.

Creating your Event Type Hierarchy

1. Select the Event Type Hierarchy task tab, and click "Browse (manage/add)."



2. Create a cabinet type:
   - Click Event Types Heirarchy, then click Cabinet Type to go to the Edit Cabinet Type page.

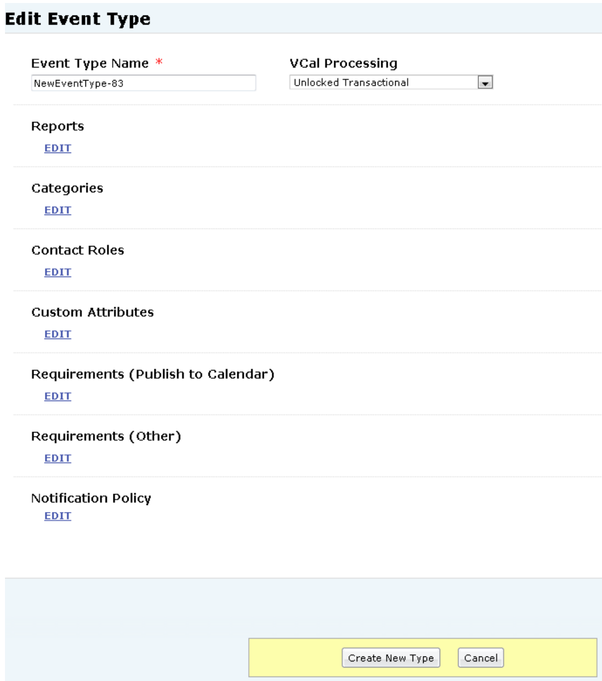


   - Enter a name for the cabinet type.
   - Click Create New Type.
3. Create the folder types within this cabinet type:
   - Click Folder Type to go to the Edit Folder Type page.
   - Enter a name for the folder type.
   - Click Create New Type.
   - If you want to create additional folder types within the cabinet type, select the cabinet type and repeat step 3.

⚠	***Don't create folder types within folder types***

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, then follow steps 4 - 6 of *"Copying types"*.

4. Create the event types within each folder type.
   - With the folder type selected, click Event Type to go to the Edit Event Type page.



   - Enter a name for the event type.
   - 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 any additional reports you want to associate with the event type, or check the "Check All" box to select all reports. See *"Associating reports and data properties with event types"*
   - 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 *"Associating reports and data properties with event types"*
5. Click Create New Type.

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, then follow steps 4 - 6 of *"Copying types"*.

6. Repeat steps ***4*** and ***5*** 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 *"Cabinets and folders"*.

Modifying your Event Type Hierarchy

You may occasionally have to modify your Event Type Hierarchy—deactivate or delete unused types, rename types, modify the reports and data properties associated with particular event types, and copy existing types to create new types.

Deactivating types

Deactivating a cabinet type, folder type, or event type means that new cabinets, folders, or events can no longer have that type. Events can't be created with a deactivated event type, but any existing event of that event type is preserved in the Series25 database, and you can report on previous events with that event type. You can also reactivate an event type if you decide you need it again later.

Note: To deactivate a cabinet type or folder type, you must first deactivate the folder types or event types within it.

1. With the Events tab selected, select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2. To deactivate cabinet types or folder types, click "Browse (manage/add." To deactivate event types click "Browse (manage/add)" or "All Event Types."
3. If you clicked "Browse (manage/add)," expand the Hierarchy as needed, and highlight the cabinet type(s), folder type(s), or event type(s) you want to deactivate.

   If you clicked "All Event Types," highlight the event types you want to deactivate.
4. Click Deactivate. The line through the type(s) indicates they are deactivated. (You can reactivate them at any time by highlighting the type(s) and clicking Activate.)

Deleting types

You can't delete a cabinet type, folder type, or event type once actual cabinets, folders, or events of that type are created. This is why it is important to plan your Event Type Hierarchy carefully.

You can, however, delete types that aren't associated with any cabinets, folders, or events. For example, you may find that certain event types are never used by schedulers, so you can "clean up" the event type list by deleting them.

Note: To delete a cabinet type or folder type, you must first delete the folder types or event types within it. You can only delete one type at a time.

1. With the Events tab selected, select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2. To delete a cabinet type or folder type, click "Browse (manage/add." To delete an event type click "Browse (manage/add)" or "All Event Types."
3. If you clicked "Browse (manage/add)," expand the Hierarchy as needed, and highlight the cabinet type, folder type, or event type you want to delete.

   If you clicked "All Event Types," highlight the event type you want to delete.

4. Click Delete.

Renaming types

Note: You can only rename one type at a time.

1. With the Events tab selected, select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2. To rename a cabinet type or folder type:
   - Click "Browse (manage/add)."
   - Expand the Hierarchy as needed, highlight the cabinet type or folder type you want to rename, and click Rename.
   - Enter the new name in the pop-up window, and click Rename.

   To rename an event type:
   - Click "Browse (manage/add)" or "All Event Types."
   - If you clicked "Browse (manage/add)," expand the Hierarchy as needed.
   - Highlight the event type you want to rename, and click Edit.
   - Change the Event Type Name, and click Save Changes.
   - Click Manage More Types to return to the Manage Event Type Hierarchy page.

Modifying the reports and data properties associated with event types

You may sometimes need to change the reports and data properties associated with certain event types. See *"Associating reports and data properties with event types"*.

If you change the reports and/or data properties associated with one or more event type after you've begun scheduling events, the modifications are applied to new events of that type, but are not retroactive to existing events.

1. With the Events tab selected, select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2. Click "Browse (manage/add)" or "All Event Types."
3. If you clicked "Browse (manage/add)," expand the Hierarchy as needed, and highlight the event type(s) you want to modify.

   If you clicked "All Event Types," highlight the event type(s) you want to modify.
4. If you selected one event type and want to modify the reports associated with it, click the "Edit" link below Reports, change the Confirmation Notice and/or Invoice report you want as the default for this event type if needed, then check or un-check to change other reports as needed, or check the "Check All" box to select all reports.

If you selected more than one event type and want to modify the reports associated with them, do the following:

To...	*Do this...*
Add or change the default confirmation notice or invoice	*1* Check the Reports: Confirmation Notice or Reports: Invoice box. *2* Choose the report from the drop-down list.
Add reports	*1* Check the Reports (Add) box. *2* Check each report you want to add.
Remove reports	*1* Check the Reports (Remove) box. *2* Un-check each report you want to remove.

5 If you selected one event type and want to modify the categories, contact roles, custom attributes, requirements (publish to calendar), and/or requirements (other) data properties associated with it, click the “Edit” link below each data type, then check or un-check data items as needed.

If you selected more than one event type and want to modify the categories, contact roles, custom attributes, requirements (publish to calendar), and/or requirements (other) data properties associated with them, do the following:

To...	*Do this...*
Add data properties	*1* Check the (Add) box of each data property. *2* Below it, check each data property you want to add.
Remove data properties	*1* Check the (Remove) box of each data property. *2* Below it, un-check each data property you want to remove.

6 Click Save Changes.

Copying types

You can copy an existing cabinet type, folder type, or event type as the basis for creating a new type. When you do this, the copied type is placed in the correct place in your Event Type Hierarchy. For example, if you copy the “Practice” event type in the “Athletics” folder type, your copied event type will also be placed in the “Athletics” folder type.

Note: You can only copy one type at a time.

1. With the Events tab selected, select the Event Type Hierarchy task tab to go to the Manage Event Type Hierarchy page.
2. To copy a cabinet type or folder type, click “Browse (manage/add).” To copy an event type click “Browse (manage/add)” or “All Event Types.”

3. If you clicked "Browse (manage/add)," expand the Hierarchy as needed, and highlight the cabinet type, folder type, or event type you want to copy.

   If you clicked "All Event Types," highlight the event type you want to copy.
4. Enter a name for the new type. ("Copy of <type name>" is entered by default.) The new type name must be unique.
5. For a new event type, edit the reports and data properties associated with the type as needed.
6. Click Save Copy.

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 in *"The Event Type Hierarchy"*

The structure 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"* 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 classes imported into 25Live from your SIS
- Allows you to enter certain data at the cabinet and/or folder level that is automatically inherited down to all folders within the cabinet and events within each folder to save data entry time and ensure data consistency (see *"Cabinet and folder data and data inheritance"*)
- Allows you to simplify the scheduling environment for different users by allowing them to access only the cabinet(s) and/or folder(s) in which they're permitted to save events. For example, Scheduler A can save events in the "Main Campus" folder, but can't see or save events in the "Law School" folder. The ability to see, edit, and create events in particular cabinets and folders is controlled by the object security on those cabinets and folders for each security group.
- 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.

Cabinet and folder data and data inheritance

Types of data you can enter for cabinets and folders

You can enter data of the following types for cabinets and folders:

- Constraints (see *"Constraints"*)
- Event Categories

You can enter data of the following type for folders:

- Organizations

Data inheritance

Some data entered for particular cabinets and folders in your event structure is inherited by folders and events within the cabinet or folder, as shown here:

	Constraints	***Event Categories***	***Organizations***
Cabinet	Can add and edit constraints	Can add and edit event categories	N/A
Folder	Inherits constraints from cabinet Can add and edit constraints	Inherits event categories from cabinet Can add and edit event categories	Can add and edit organizations
Event	Inherits constraints from folder Can add and edit constraints	Inherits event categories from folder Can add and edit event categories	Doesn't inherit organizations from folder Can add and edit organizations

Data inheritance examples

- Dates for the Thanksgiving holiday set for a cabinet are inherited by all the cabinet's folders and by each folder's events.
- A folder that contains imported class sections has an event category that identifies the term. All events within the folder inherit that term category.

Constraints

Constraints define when events 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 constraints affect events

The constraints inherited by an event from its folder or cabinet and/or defined for the event itself work together with the dates/times defined for the event to determine the event's actual dates/times.

For example, the BIO301 class meets every Monday, Wednesday, and Friday at 9 a.m. from August 26, 2019 through December 13, 2019. The event has inherited several date/time constraints from its cabinet that prevent classes from being scheduled on the following US 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 an occurrence or a location or resource assignment for the Friday following Thanksgiving day.

> ***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 *"Adding a location".*

Constraint types

When you create a 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 constraint 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 3:00 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 should apply to a particular event.

Cabinet and folder date boundaries

When you create a cabinet, you must define its date boundaries. Date boundaries are the earliest (start date) and latest (end date) any event within the cabinet can occur. The date boundaries of a cabinet are automatically inherited by the folders within the cabinet. You have the option of changing the date boundaries of folders as needed, but they must be the same as or within the date boundaries of their cabinet.

You can set end dates fairly far into the future. For example, the date boundaries of the *"Cabinet/ folder example"* are January 1, 2015 to December 31, 2025, as are the date boundaries of each of its folders.

The default routing rule

25Live uses a default routing rule to determine where to place new SIS classes imported into 25Live in your event structure. You should build your cabinet/folder event structure to use the default routing rule.

Default routing rule conditions

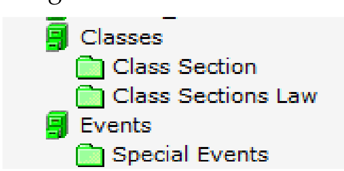
The default routing rule uses these conditions to determine which folder an imported class should be placed in:

- ***Event type***
  The folder must be an appropriate folder type for the class, based on the event type of the class.
- ***Date range***
  The date range of the class must be the same or within the date range of its "parent" folder.
- ***Organization***
  If more than one folder meets both the above conditions, 25Live looks for a folder with the same associated organization as class.
- ***Event category***
  If more than one folder meets all the above conditions, 25Live looks for a folder in the same event category as the class.

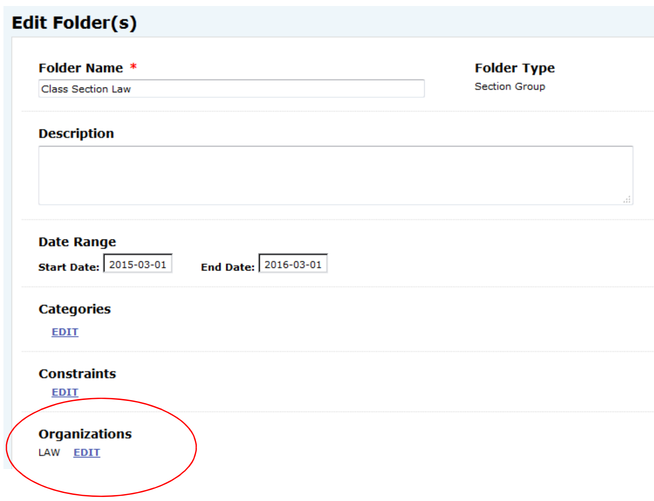
> ***How object security affects routing***
>
> Object security also plays a major role in routing. The LYNX Interface user must be able to save the class to the folder identified by the default routing rule based on the user's object security rights to that folder. We recommend, therefore, that you make the LYNX user a member of the System Administrators (-1) security group, or another security group that has global rights to save events, to minimize routing issues.

Cabinet/folder example

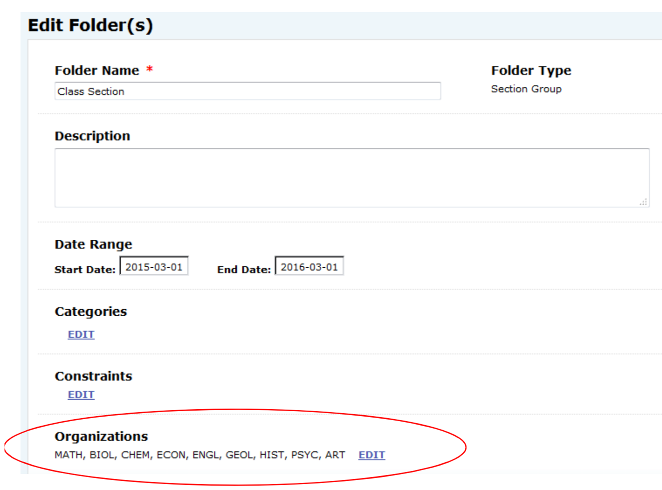
The example event structure below is based on the Event Type Hierarchy described in the *"A little more complexity"* example. In it, we've create two cabinets: Classes and Events. In the Classes cabinet, we've created two folders: Class Section and Class Sections Law. In the Events cabinet, we've created a single Special Events folder. The folders in each cabinet automatically inherit the date range of their cabinet.



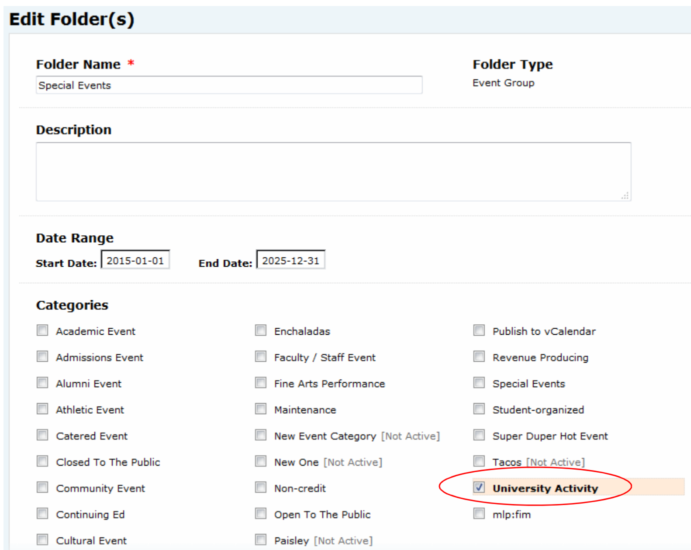
The Class Section and Class Sections Law folders will contain all class sections imported from the SIS that fall within the date range of those folders (both folders have the same date range inherited from the Classes cabinet). Both folders have a “Section Group” folder type. What distinguishes Law sections from all other sections is the subject code organization we’ve associated with the folder—LAW. Based on the system's default routing rule, imported law school sections (those with LAW as their associated organization) will be routed into the Class Sections Law folder because that folder has the LAW organization associated with it.



All other sections will be routed into the Class Section folder, because we’ve associated all subject code organizations other than Law with that folder.



Events with a Conference Event, Meeting/Gathering, or Student Activity event type that fall within the date range of the Special Events folder will be placed in that folder. We selected the "University Activity" category for that folder, so all events in it will automatically inherit that category for event searching and reporting purposes.



Guidelines for creating cabinets and folders

Follow these guidelines when creating cabinets and folders:

- Take the time to read this very helpful "25Live-oriented Event Structures" article available here:

http://knowledge25.collegenet.com/display/Series25/25Live-oriented+Event+Structures

- Set the appropriate date range for each cabinet and folder.
- Enter the appropriate data for each cabinet and folder for data inheritance purposes.
- Create a cabinet and folder structure that can use the default routing rule. See *"The default routing rule"*
- Have your system administrator set up appropriate object security on cabinets and folders. See the *25Live Security Administration Guide*, accessible by clicking Help, for information.

Managing cabinets

	Required functional security Functional security required to create, edit, and delete cabinets: • Cabinets and Folders: Cabinets = Can view, edit and create • Cabinets and Folders: Cabinet Delete = Can Delete

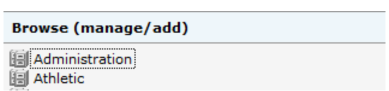
Manage Cabinets task tab

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

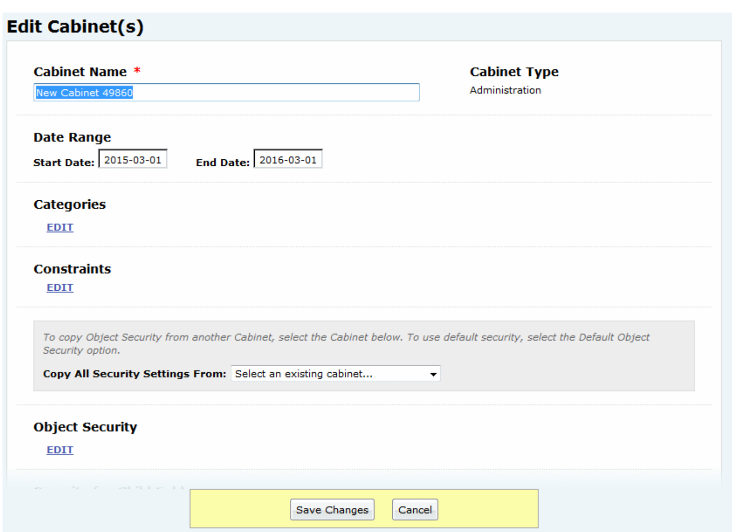
- Add new cabinets
- Edit cabinets one by one or multiple cabinets simultaneously
- Delete cabinets

Adding a cabinet

1. With the Manage Cabinets task tab selected, find the cabinet type of the cabinet you're adding by browsing your event structure. For example, if the cabinet you want to create should have a "Administration" cabinet type, you would click that cabinet type in Browse (manage/add) as shown here:

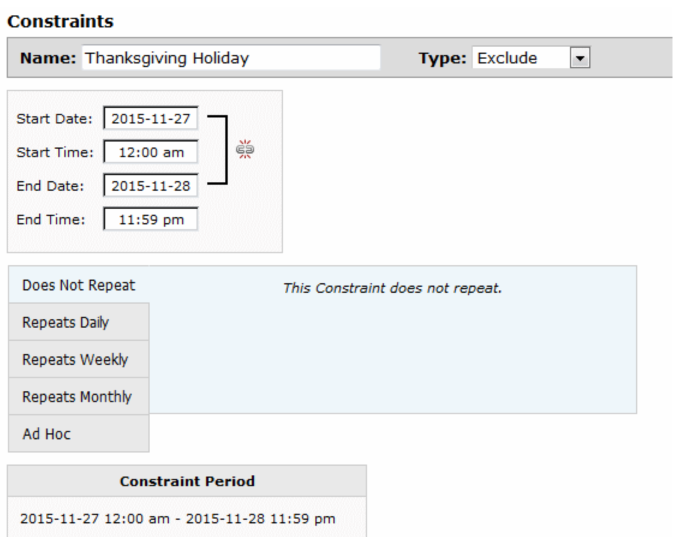


2. Click Add Cabinet to go to the Edit Cabinet(s) page.



3. Replace the system-supplied name with a name for the new cabinet.
4. Use the calendar controls to specify the start and end dates of the cabinet's date range.
5. Click the Categories "EDIT" link and select the appropriate categories for the cabinet.
6. Click the Constraints "EDIT" link, then define constraints for the cabinet:
   - Click New Constraint.
   - Enter a name for the constraint and select a constraint type.
   - Enter the constraint start date/time and end time and, if the time span of the constraint spans midnight, click the link icon and enter the end date.
   - If the constraint repeats, select and define the repeating pattern using the pattern definition controls.
   - Repeat these steps for other constraints you want to define.

Constraint Example:



7. 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.

Editing one or more cabinets

1. With the Manage Cabinets task tab selected, find the cabinet(s) you want to edit by simple name search, by browsing your event structure, or by clicking "All Cabinets" to see a complete list of all the cabinets in your event structure.
2. If you browsed, expand the event structure as needed.

3. Highlight the cabinet(s) you want to edit and click Edit. To highlight multiple cabinets, hold down the Shift 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.

4. If you highlighted one cabinet, edit its information as needed. Click the "EDIT" link to expand areas that are closed.

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

Note: You can't edit the cabinet type.

5. Modify the object security of the cabinet as needed. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing this task.
6. Click Save Changes.

Deleting a cabinet

⚠	Deleting a cabinet deletes all the folders and events within it, so 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.

Note: You can only delete one cabinet at a time.

1. With the Manage Cabinets task tab selected, find the cabinet you want to delete by simple name search, by browsing your event structure, or by clicking "All Cabinets."
2. If you browsed, expand the event structure as needed.
3. Highlight the cabinet you want to delete and click Delete Cabinet.
4. Click Delete Cabinet to confirm.
5. Click Manage More Cabinets to return to the Manage Cabinets page.

Managing folders

	Required functional security Functional security required to create, edit, and delete folders: • Cabinets and Folders: Folders = Can view, edit and create • Cabinets and Folders: Folder Delete = Can Delete

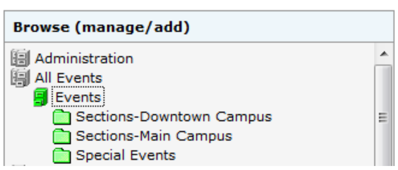
Manage Folders task tab

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
- Force a folder to inherit data from its parent folder or cabinet

Adding a folder within a cabinet

1. With the Manage Folders task tab selected, find the cabinet you want to add your new folder within by browsing your event structure. For example, if you want the folder you're adding to be in the "Events" cabinet, you would click that cabinet in Browse as shown here:



	Don't create folders within folders

2. Click Add Folder.
3. Replace the system-supplied name with a name for the new folder.
4. If you want the folder's date range to be shorter than that of its cabinet, use the calendar controls to specify the begin and end dates of the folder's date range.
5. Click the Categories "EDIT" link and select categories specific to the folder, if any. The folder has inherited any categories selected for its cabinet which you can un-select as needed.

6. Define any constraints specific to the folder, if any. The folder has inherited any constraints which you can edit as needed.
   - Click the Constraints "EDIT" link.
   - Click New Constraint.
   - Enter a name for the constraint and select a constraint type.
   - Enter the constraint start date/time and end time, and if the time span of the constraint spans midnight, click the link icon and enter the end date.
   - If the constraint repeats, select and define the repeating pattern using the pattern definition controls.
7. Click the Organizations "EDIT" link, click New Organization, and search for an organization the folder is associated with. For example, if you're adding a new English department folder, you would search for and select the English department organization. Repeat this step for each organization the folder is associated with.
8. If you selected one organization in step 7, it is automatically marked as the primary organization associated with the folder. If you selected multiple organizations in step 7, select the radio button of the primary organization you want to associate with the folder.
9. Specify the object security of the new folder. See the *25Live Security Administration Guide*, accessibly by clicking Help, for information on performing this task.
10. Click Save Changes.

Copying folders

1. With the Manage Folders task tab selected, find the folder(s) you want to copy by simple name search, by browsing your event structure, or by clicking "All Folders."

Note: To copy more than one folder, you must browse your event structure.

2. Highlight the folder(s) and click Copy.
3. Choose the "parent" of your new folder(s) (the cabinet you want your new folder(s) to be in) from the drop-down list, then click Copy Folder(s).
4. To edit one or more new folders you've created via copy:

- Click Manage More Folders.
- Follow steps ***2*** - ***4*** in *"Editing one or more folders"* below.

Editing one or more folders

1. With the Manage Folders task tab selected, find the folder(s) you want to edit by simple name search, by browsing your event structure, or by clicking "All Folders."
2. Highlight the folder(s) you want to edit and click Edit. To highlight multiple folders, hold down the Shift key and click each folder.

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

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

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

Note: You can't edit the folder type.

4. Modify the object security of the folder as needed. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing this task.
5. Click Save Changes.

Deleting a folder

⚠	Deleting a folder deletes all the events within it, so 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.

Note: You can only delete one folder at a time.

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.
3. Click Delete Folder to confirm.
4. Click Manage More Folders to return to the Manage Folders page.

Forcing folders to inherit data from their cabinet

1. With the Manage Folders task tab selected, find the folder(s) you want to inherit data by simple name search, by browsing your event structure, or by clicking "All Folders."
2. If you browsed, expand the event structure as needed.

3. Highlight the folder(s) and click Inherit.
4. Click "Inherit data to folder."

Managing events

	Required functional security Functional security required to use all the functions available from the Manage Events tab: • Events: Events = Can view, edit, create, and copy • Events: Event Delete = Can delete • Cabinets and Folders: Cabinets = Can view, edit and create • Cabinets and Folders: Folders = Can view, edit and create • Object Security, Assignment Policy, and Notification Policy: Event/Folder/Cabinet Object Security = Can view and edit object security

Manage Events task tab

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

- Bind back-to-back events (applicable only if you're using the legacy TCS Interface)
- Complete vCalendar To Do's for multiple events and export the events to your SIS (applicable only if you're using the legacy TCS Interface)
- Delete multiple events
- Force selected events to inherit data from their parent folder or cabinet

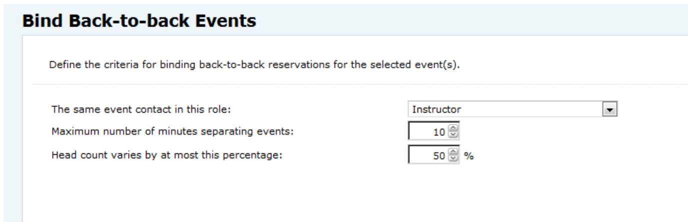
Binding back-to-back events

These instructions pertain to you only if you're currently using the legacy Series25-SIS (TCS) Interface. If you're using the Series25 LYNX Interface, you should use the back-to-back binding functionality available in LYNX instead. If you're not yet using the LYNX Interface, we urge you to contact your Account Manager at series25implementation@collegenet.com about upgrading to it.

Description of back-to-back events

The 25Live Administration Utility allows you to create binding space assignment relationships among 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 back-to-back on the Bind Back-to- back Events page.



By default, events are considered back-to-back 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.

Instructions for binding back-to-back events

1. With the Manage Events task tab selected, find the events you want to bind by simple name search, browsing your event structure, or other search.
2. If you browsed, expand the event structure as needed.
3. Highlight each event you want to bind.
4. Click Bind Back-to-back.
5. Modify the conditions to specify what you mean by "back-to-back" as needed.
6. Click Run Bind.

Completing vCalendar To Do's for multiple events and exporting the events to your SIS

These instructions pertain to you only if you're currently using the legacy Series25-SIS (TCS) Interface. If you're using the Series25 LYNX Interface, there is no need to complete vCalendar To Do's. If you're not yet using the LYNX Interface, we urge you to contact your Account Manager at series25implementation@collegenet.com about upgrading to it.

1. With the Manage Events task tab selected, find the events you want to complete vCalendar To Do's for and export to your SIS by simple name search, browsing your event structure, or other search.

2. On the Manage Events page, highlight each event you want to complete vCalendar To Do's for and export to your SIS.

Note: If you select an event that is part of a bound location assignment group, when you complete the To Do for that event, the To Do will be completed for all other members of the group.

3. Click Export to SIS.
4. Choose how you want 25Live to complete "Needs Space" and "Exceeds Head Count" To Do's for the events you selected in step 2—only complete if the required condition has been met or complete whether or not the required condition has been met.
5. Choose an export criterion for the events you selected in step 2—export only events with completed To Do's or export all events.
6. Click Export to SIS.
   You receive a success message when the export is done.

Note: If needed, you can re-export any or all the events.

Deleting multiple events

1. With the Manage Event task tab selected, find the events you want to delete by simple name search, browsing your event structure, or other search.
2. If you want to delete individual events in the displayed list, highlight each event you want to delete, then click Delete.

   If you want to delete all the events in the displayed list, click Delete All.
3. Click Delete Event to confirm.

Forcing selected events to inherit data from their parent folder or cabinet

1. With the Manage Events task tab selected, find the events you want to inherit data by simple name search, browsing your event structure, or other search.
2. On the Manage Events page, highlight the events you want to inherit data.
3. Click Inherit.
4. Click "Inherit data to Events."

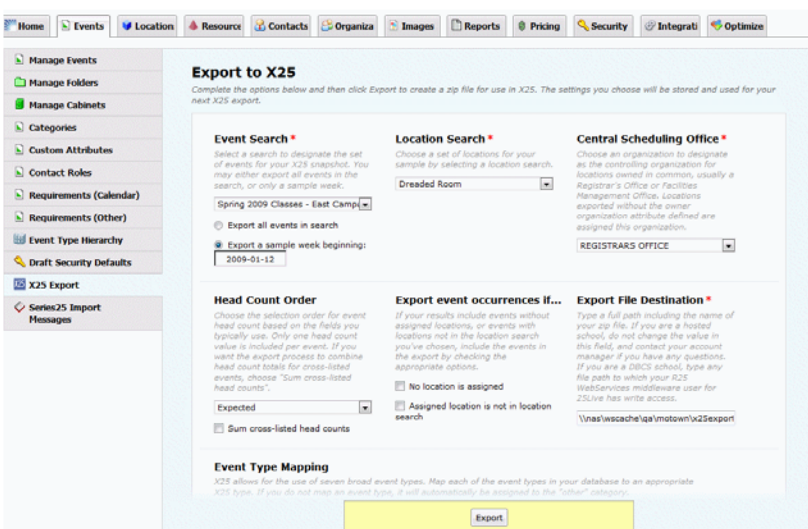
Exporting data to X25

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

	Required functional security Functional security required to export data to X25: Integration: X25 Export = Can use all features

The Export to X25 page of the 25Live Administration Utility 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.



Viewing Series25 import messages

Required functional security

Functional security required to view Series25 import messages:

Integration: vCalendar Import = Can use all features

The 25Live Administration Utility provides the ability to view import messages returned after classes from your SIS were imported into 25Live via the legacy Series25-SIS (TCS) Interface.

Note: The messages shown on this page do not pertain to classes imported using the Series25 LYNX Interface which has its own import/export messages view.

1. Select the Series25 Import Messages task tab.
2. Enter or select the start date/time and end date/time of the date/time range of the import messages you want to view.
3. Choose from the drop-down list whether you want to see only errors, warnings and errors, or messages, warning, and errors.
4. Click Refresh.

Note: You can click the link in the Event column to open that event in 25Live Pro.

Importing non-SIS events

The 25Live Administration Utility provides the ability to import events into 25Live from any non-SIS third party data source (such as Outlook). Information about the web service and the required CSV events file specifications is available here:
http://knowledge25.collegenet.com/display/CustomerResources/Event+Import+Web+Service+-+events.csv

You must license the events.csv web service separately to have access to this function. If you're interested in learning more, contact your Account Manager (series25implementation@collegenet.com).

To use the function:

1. Click Browse, then find and select the CSV file containing the events you want to import into 25Live.
2. Click Import File.

Locations Data Administration

Location data

Definition of location

The term ***location*** refers to any room or facility that could be assigned to an event. 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.

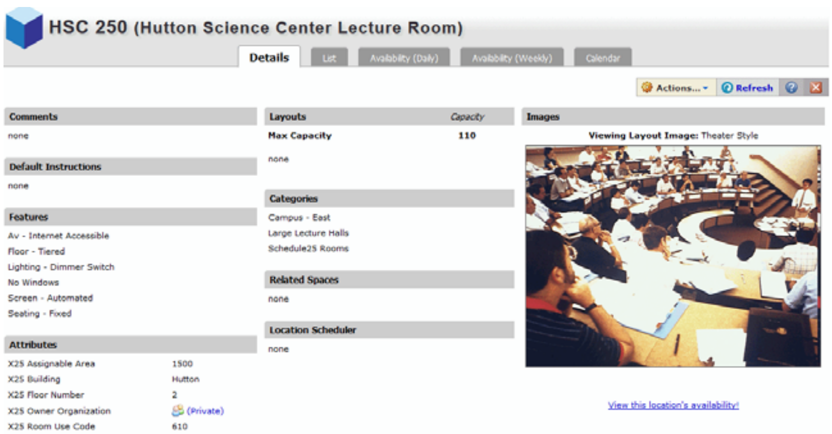
Types of location data you can store

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
- Express Scheduling—event type and maximum event duration options required to use the Express Scheduling features of 25Live Scheduling
- Layouts—including capacity and fill ratio, instructions, and which is the default layout of the location
- Default setup instructions
- Partition—area of campus; used in Schedule25 Optimizer processing
- Features—physical features of the location, including quantity of each
- 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"*

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"*

Locations tab

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

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

Location master definitions

Description of location master definitions

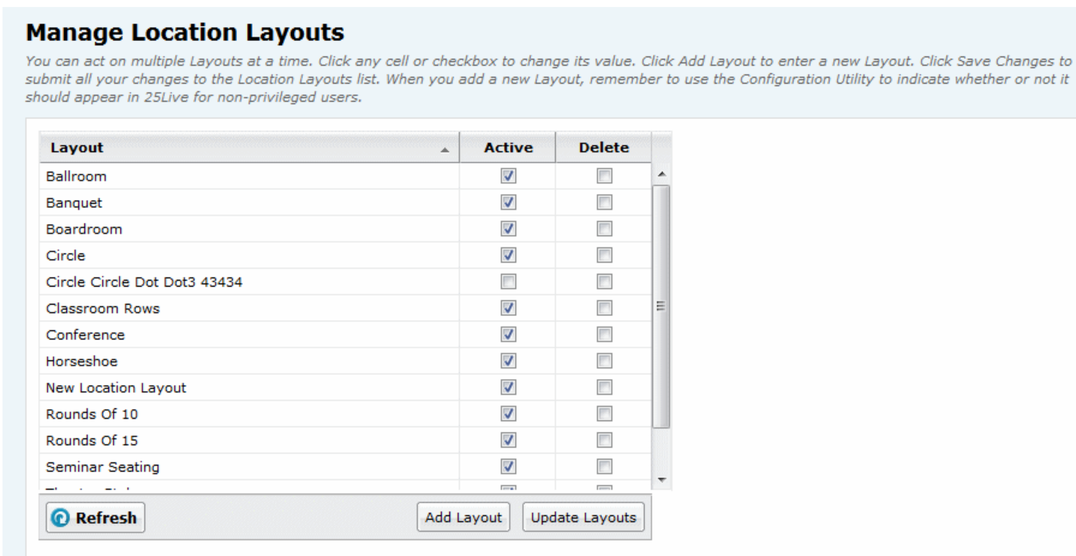
Some location data comes from location master definitions—comprehensive, relatively stable lists of location attributes you create before you create locations. You apply the appropriate items from these lists to each location.

This location master definition...	***Is a list of...***
Location Categories	Ways you want to group locations for reporting and searching purposes
Location Custom Attributes	Additional location data you want to track
Location Features	Physical attributes of locations

This location master definition…	***Is a list of…***
Location Categories	Ways you want to group locations for reporting and searching purposes
Location Custom Attributes	Additional location data you want to track
Location Layouts	Physical arrangements locations may have
Location Partitions	Mutually exclusive location groupings used in Schedule25 Optimizer processing

Location master definition example

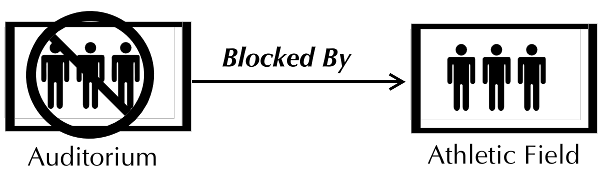
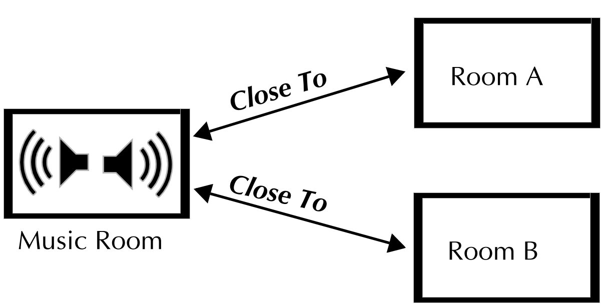
This is an example of the Location Layouts definition.



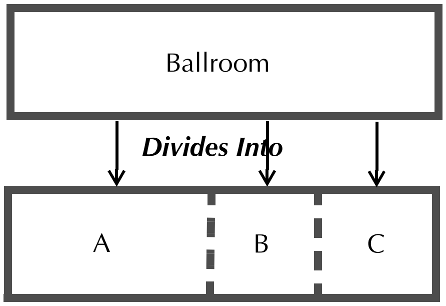
Location relationships

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>
<tr><th>This relationship...</th><th>Defines...</th><th>For example...</th></tr>
<tr><td>Also Assign</td><td>Other locations that are also automatically assigned to an event when this location is assigned.</td><td rowspan="2">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>
<tr><td colspan="2">
</td></tr>
<tr><td colspan="3">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.</td></tr>
<tr><td>Blocked By</td><td>Other locations, that if already assigned for the same date and time, “block” (prevent) this location from being assigned.</td><td rowspan="2">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 colspan="2">
</td></tr>
<tr><td colspan="3">Blocked By relationships aren’t reciprocal, so in this example the athletic field won’t be automatically blocked when you assign the auditorium to an event. If you want that, you must specify the blocked by relationship for each related location. In the example above, you would have to also specify that the athletic field is blocked by the auditorium.</td></tr>
<tr><td>Close To</td><td>Other locations that are close to this location. You determine what “close to” means.</td><td rowspan="2">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 colspan="2">
</td></tr>
<tr><td colspan="3">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.</td></tr>
</table>

This relationship...	Defines...	For example...
Divides Into	Other locations that are subdivisions of this location and, therefore, can't be assigned for the same date and time.	You want to ensure that when a large ballroom is assigned to an event, its smaller ballroom components can't be assigned to other events meeting at the same date and time. To do this, you would specify that the ballroom "divides into" the smaller locations.



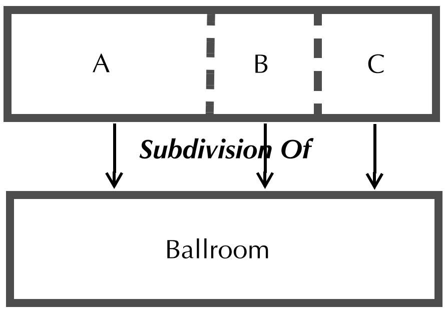
Divides Into relationships are reciprocal with Subdivision Of relationships, so in this example when you establish that the Ballroom divides into Ballrooms A, B, and C, each of the smaller locations is defined as a subdivision of the Ballroom. 25Live treats an event in any of the smaller locations as 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

Best Practice: 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.

This relationship...	*Defines...*	*For example...*
Subdivision Of	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.	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.



Subdivision Of relationships are reciprocal with Divides Into relationships. See explanation on *page 54*.

Managing location master definitions

🔒	***Required functional security*** Functional security required to manage event master definitions: Searches and Master Definitions: Location = Can view, add and edit active and inactive master definitions.

Location master definition task tabs

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

System-supplied location master definition items

25Live includes a number of system-supplied location master definition items marked "[SYSTEM]" and grayed out. These items can't be edited or deleted, but can be deactivated.They include the following:

Master Definition	***Item***	***Purpose***
Location Custom Attributes	Latitude	Used to designate the latitude of an event location for use by Google Maps in location detail displays.
	Longitude	Used to designate the longitude of an event location for use by Google Maps in location detail displays.
	Map	Most often used to specify a URL to a campus map PDF with an event's location highlighted.
	WDYT Location Survey	(not currently in use)
	X25 Assignable Area	Used to specify the net assignable square feet of a location for X25 space analysis purposes.
	X25 Building	Used to specify the building a location (space) is in for X25 space analysis purposes.
	X25 Floor Number	(not currently in use)
	X25 Owner Organization	Used to designate the organization that has primary responsibility for a location for X25 space analysis purposes.
	X25 Room Use Code	Used to designate the room use code of a location for X25 space analysis purposes.

Guidelines for adding location master definitions

When adding this master definition...	***Follow these guidelines...***
Location Categories	Create categories that make it easy for 25Live users to find and report on locations. Create categories that assist in grouping events by assigned location.
Custom Attributes	Create custom attributes that allow users to provide additional needed location 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, Room Deposit ($).

When adding this master definition...	*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 definition.
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? Remember that partitions are mutually exclusive location groupings; a location can be in only one partition.

Adding or updating a location master definition

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

Note: Be aware that all of the updates you make (item additions/deletions, label changes, activates/deactivates) are made simultaneously when you click Update.

To...	*Do this...*
Add an item	***1*** Click Add <item>. ***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.

To...	*Do this...*
Edit an item label	*1* Click the item to make it editable. *2* Use the arrow keys to position your cursor where you want to make changes. *3* Backspace as needed to delete characters. Enter characters as needed.
Activate or deactivate items	Check or uncheck the Active box of each item.
Delete items	Check the Delete box of each item.
Specify that you do or don't want to use a feature in Schedule25 Optimizer processing (Features only)	Check or uncheck the Schedule25 box of each feature.

3 Click Update <master definition>.

Managing Locations

Required functional security

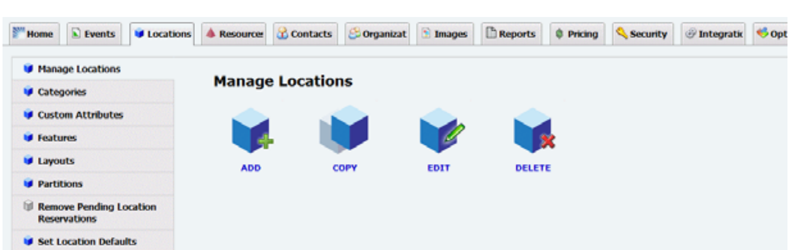
Functional security required to add, edit, copy, and delete locations:

- Locations: Location Access = Can view, edit, and create, Locations tab appears in 25Live
- Locations: Location Delete = Can delete

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 one by one or multiple locations simultaneously



Guidelines for adding a location

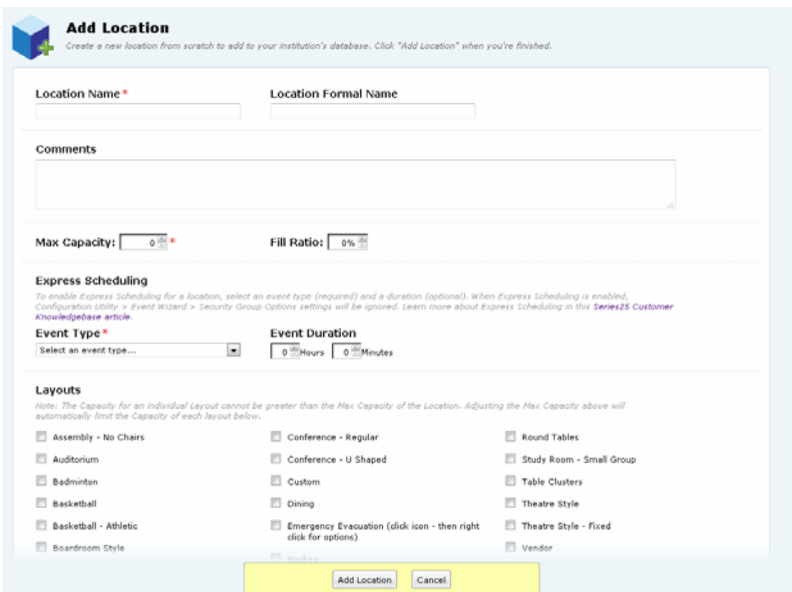
- Only Location Name and Max Capacity are required to add the location.
- Because the location name or formal name (depending on which has been specified in the 25Live Configuration Utility) appears in event web calendars you publish using the 25Live Publisher, make sure these names would make sense to the general public and comply with your location naming conventions.
- You may want to review your Location Layouts, Features, and Categories master definitions and possibly add new items to them for selection here. Having good groupings can greatly assist 25Live users in searching for locations and in the 25Live Pro Event Form. See *"Managing location master definitions"*
- When selecting layouts for the location, you can also specify the capacity of the location in each selected layout (the maximum capacity is entered by default) and/or the fill ratio you want to achieve in each selected layout. You can also enter layout instructions and select layout photographs and diagrams from your image directory.
- 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. 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.
- If you'll be using the Express Scheduling features of 25Live Scheduling, enable Express Scheduling, choose an Event Type, and optionally enter a Maximum Event Duration. For more information, see this article: *http://knowledge25.collegenet.com/display/Series25/How+To+Use+Express+Scheduling+in+25Live*
- You can specify a Location Scheduler to automatically route new events that request the location to that scheduler.
- When selecting features of the location, you can also specify the quantity of each feature in the location.
- When selecting attributes of the location, specify the value of each.
- 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 definition 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*

- 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 for dates/times the location is unavailable for assignment.
- Define the relationship of this location to other locations as needed. See *"Location relationships"*

Adding a location

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



Note: You must scroll down to see all the location information you can specify.

2. Enter the location name (required) and, optionally, the location formal name and/or any comments.
3. Enter the maximum capacity of the location (required) and, optionally, a fill ratio.
4. If you plan to use the Express Scheduling features of 25Live Scheduling, click Enable Express Scheduling, choose an Event Type, and optionally enter a Maximum Event Duration.
5. Check each layout the location can be configured in. Optionally, for each layout enter the maximum capacity, fill ratio, whether or not that layout is the default, and/or layout instructions. Select layout photographs and/or diagrams from your image directory as needed.
6. Enter any default setup instructions for the location.

7. If you'll be scheduling the location using the Schedule25 Optimizer, choose the partition the location is in.
8. To specify a Location Scheduler to automatically route new events that request the location to that scheduler:
   - Click Add a Scheduler.
   - Do a simple name search for the scheduler.
   - If more than one name is returned, select the scheduler.

Note: You must also configure security groups to use the scheduler specified for the location. For information, see the *25Live Configuration Utility* documentation.

9. Check the location's features and the categories it belongs to.
10. Check the custom attributes that pertain to the location and enter or select the appropriate value for each.
11. Enter the hours of availability (open/close hours) of the location for each day of the week. To close the location for an entire day, click the Close button for that day.
12. Define blackout dates of the location as needed. To define a blackout date:
    - Click New Blackout.
    - Enter the blackout 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).
    - If the blackout repeats, select and define the repeating pattern using the pattern definition controls.

Note: Repeating patterns are limited to 7 years, and long repeating patterns can slow the system. Simple blackouts using a single occurrence from Date A to Date B are more efficient and recommended.

13. Define the relationship of this location to other locations as needed.
    - Click New Relationship.
    - Select the kind of relationship (also assign, blocked by, close to, divides into, or subdivision of). See *"Location relationships"*
    - Select the location that has this relationship.
14. 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.
15. Click Add Location.

Copying 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 or public 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.
6. Modify the object security, assignment policy, and/or notification policy of the new location as needed. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.
7. Click Add Location.

Editing 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 or public search.

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

3. To edit selected locations in the displayed list, highlight the location(s) and click Edit Selected.

   To edit all the locations in the displayed list, click Edit All.

   Locations you have permission to edit have a "Yes" in the Can Edit? column of the location list.

⚠	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 selected one location, edit its information as needed. Click the "EDIT" link to expand sections that are closed.

   If you selected 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.
5. Modify the object security, assignment policy, and/or notification policy of the location(s) as needed. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.

6. Click Save Changes.

Deleting locations

	Consider carefully before deleting locations, because when you do the locations are completely removed from your Series25 database, including all past actions taken on the locations (assignments to events, information edits, and so on), who performed them, and when. All information about the locations, 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(s) you want to delete by simple name search, alphabetical index, grouping, or saved or public search.

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

3. To delete selected locations in the displayed list, highlight the location(s) and click Delete.

   To delete all the locations in the displayed list, click Delete All.
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

	Required functional security Functional security required to remove pending location reservations: Locks and Overrides: Locks and Pending Reservations = Can view and remove anyone's locked items and pending reservations

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.

Removing 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.

This could include...	*Such as...*
Equipment	Audio visual equipment Laboratory equipment Vehicles
Services	Food Services IT Support Maintenance Physical Plant/Facilities
Personnel	AV Techs Security Officers Custodians
Supplies	Catered items Conference materials Tables and Chairs

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.

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 definitions as described in "Event master definitions" and can be set up to be displayed based on event type as described in "Associating reports and data properties with event types"

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".

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"
- Stock Totals for different time periods; see "Resource stock totals"

Resources tab

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

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

Resource master definitions

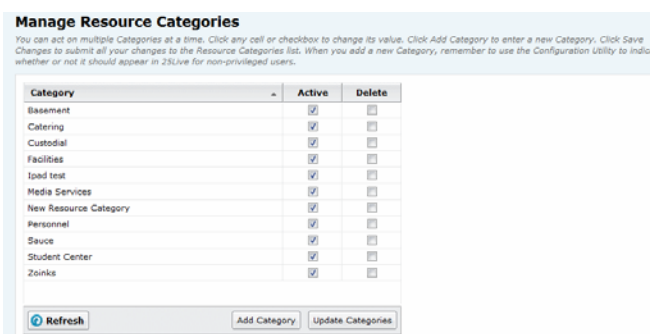
Description of resource master definitions

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

This resource master definition…	***Is a list of…***
Resource Categories	Ways you want to group resources
Resource Custom Attributes	Additional resource data you want to track

Resource master definition example

This is an example of the Resource Categories master definition.



Resource relationships

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:

This relationship...	***Defines...***	***For example***
Also Assign  	Other resources that are also automatically assigned to an event when this resource is assigned.	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.
Substitute With  	Other resources that can be substituted for the requested resource.	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. ***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 2019, but plans to purchase two more vans by January 15, 2020 you might have the following stock totals:

Date	***End Date***	***Stock Total***
1/1/19	12/31/19	5
1/15/20	12/31/20	7

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, 2019, 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.

Managing resource master definitions

Required functional security

Functional security required to manage resource master definitions:

Searches and Master Definitions: Resource = Can view, add and edit active and inactive master definitions.

Resource master definition task tabs

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

Guidelines for adding resource master definitions

When adding this master definition...	***Follow these guidelines...***
Resource Categories	Create categories that make it easy for 25Live users to find and report on resources. Create categories that assist in grouping events by assigned resource.
Custom Attributes	Create custom attributes that 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 ($).

Adding or updating a resource master definition

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

Note: Be aware that all of the updates you make (item additions/deletions, label changes, activates/deactivates) are made simultaneously when you click Update.

To...	***Do this...***
Add an item	***1*** Click Add <item>. ***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.
Edit a item label	***1*** Click the list item to make it editable. ***2*** Use the arrow keys to position your cursor where you want to make changes. ***3*** Backspace as needed to delete characters. Enter characters as needed.
Activate or deactivate items	Check or uncheck the Active box of each item.
Delete items	Check the Delete box of each item.

3 Click Update <master definition>.

Managing resources

Required functional security

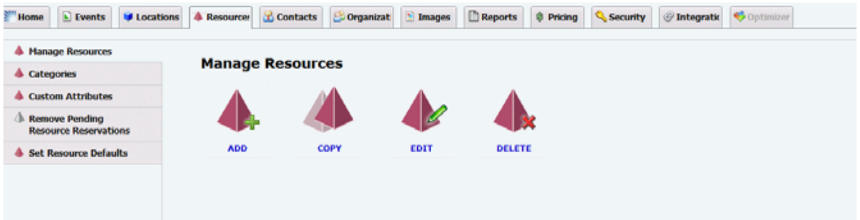
Functional security required to add, edit, copy, and delete resources:

- Resources: Resource Access = Can view, edit, and create, Resources tab appears in 25Live
- Resources: Resource Delete = Can delete

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 one by one or multiple resources simultaneously

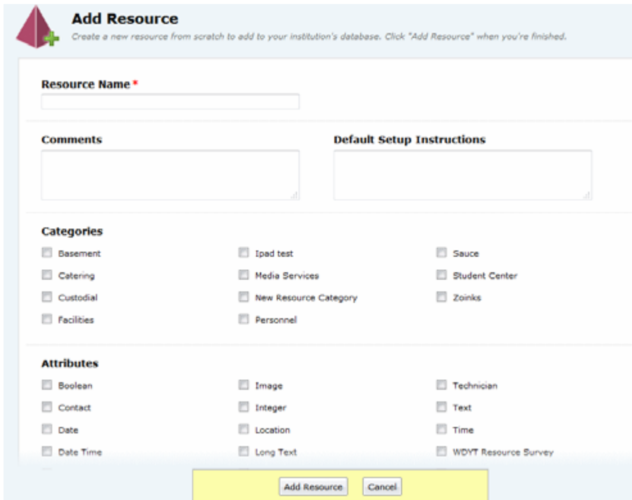


Guidelines for adding a resource

- 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 definition and possibly add new categories to it for selection here. Having good categories can greatly assist 25Live users in searching for resources and in the 25Live Pro Event Form. See "Managing resource master definitions"
- When selecting attributes of the resource, specify the value of each.
- 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.
- Define the relationship of this resource to other resources as needed.

Adding a resource

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



Note: You must scroll down to see all the resource information you can specify.

2. Enter the resource name (required) and, optionally, any comments and/or default setup instructions.
3. Check the categories the resource belongs to.
4. Check the custom attributes that pertain to the resource and enter or select the appropriate value for each. If you have an image custom attribute and want to associate an image with the resource, select the image from your image directory.
5. Define the relationship of this resource to other resources as needed:
   - Click New Relationship.
   - Select the kind of relationship (substitute with or also assign).
   - Select the resource that has this relationship.
6. If you want to specify stock totals for the resource:
   - Click New Stock Level.
   - Enter the start and end dates of the stock total period, then enter the stock level quantity.
   - Repeat to add more stock totals for other time periods.
7. 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.
8. Click Add Resource.

Copying 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 or public 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.
6. Modify the object security, assignment policy, and/or notification policy of the new resource as needed. See the *25Live Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.
7. Click Add Resource.

Editing 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 or public search.

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

3. To edit selected resources in the displayed list, highlight the resource(s) and click Edit Selected.

   To edit all the resources in the displayed list, click Edit All.

   Resources you have permission to edit have a "Yes" in the Can Edit? column of the resource list.

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

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.

5. Modify the object security, assignment policy, and/or notification policy of the resource(s) as needed. See the *Security Administration Guide*, accessible by clicking Help, for information on performing these tasks.
6. Click Save Changes.

Deleting a resource

	Consider carefully before deleting resources, because when you do the resources are completely removed from your Series25 database, including all past actions taken on the resources (assignments to events, information edits, and so on), who performed them, and when. All information about the resources, 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(s) you want to delete by simple name search, alphabetical index, category, or saved or public search.

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

3. To delete selected resources in the displayed list, highlight the resource(s) and click Delete.

   To delete all the resources in the displayed list, click Delete All.
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

	Required functional security Functional security required to remove pending resource reservations: Locks and Overrides: Locks and Pending Reservations = Can view and remove anyone's locked items and pending reservations

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.

Removing 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 perform other system functions, 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

Contacts tab

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

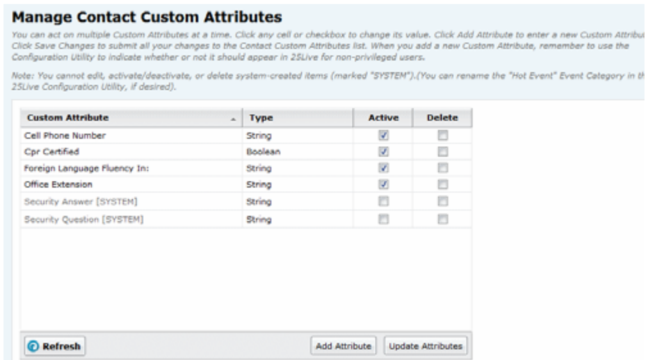
- Manage (create and edit) the Contact Custom Attributes master definition
- Manage (add, copy, edit, and delete) contacts

Contact Custom Attributes master definition

Description of Contact Custom Attributes master definition

Some contact data comes from your Contact Custom Attributes master definition—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.



Managing the Contact Custom Attributes master definition

Required functional security

Functional security required to manage the Contact Custom Attributes master definition:

Searches and Master Definitions: Contact = Can view, add and edit active and inactive master definitions

Custom Attributes task tab

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

System-supplied contact master definition items

25Live includes a number of system-supplied contact master definition items marked “[SYSTEM]” and grayed out. These items can’t be edited or deleted, but can be deactivated.They include the following:

Master Definition	***Item***	***Purpose***
Contact Custom Attributes	Security Answer	Used by the system to house the answer given by a 25Live user to a security question sent in response to a new password request. If the user provides the correct answer, the system sends an email with a new password.
	Security Question	Used by the system to house the security question to be sent to a 25Live user in response to a new password request.

Guidelines for adding contact custom attributes

- Create custom attributes that 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?

Adding or updating the Contact Custom Attributes master definition

1. Click the Custom Attributes task tab.
2. Add or update the definition.

Note: Be aware that all of the updates you make (item additions/deletions, label changes, activates/deactivates) are made simultaneously when you click Update.

To...	***Do this...***
Add an item	***1*** Click Add <item>. ***2*** Enter the item name in the space provided. ***3*** Choose the data type. ***4*** Uncheck the Active box if you don’t want the item to be active at this time.
Edit an item	***1*** Click the list item to make it editable. ***2*** Use the arrow keys to position your cursor where you want to make changes. ***3*** Backspace as needed to delete characters. Enter characters as needed.
Activate or deactivate items	Check or uncheck the Active box of each item.
Delete items	Check the Delete box of each item.

3 Click Update Attributes.

Managing contacts

Required functional security

Functional security required to create, edit, and delete contacts (including 25Live users):

- Contacts: Contact Access = Can view, edit, and create
- Contacts: Contact Delete = Can delete
- Contacts: Security Groups = Can view user lists, change security group permissions, assign members to groups, make users active or inactive, create and delete security groups, and enable/ disable object security

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 Pro Event Form.

Manage Contacts task tab

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

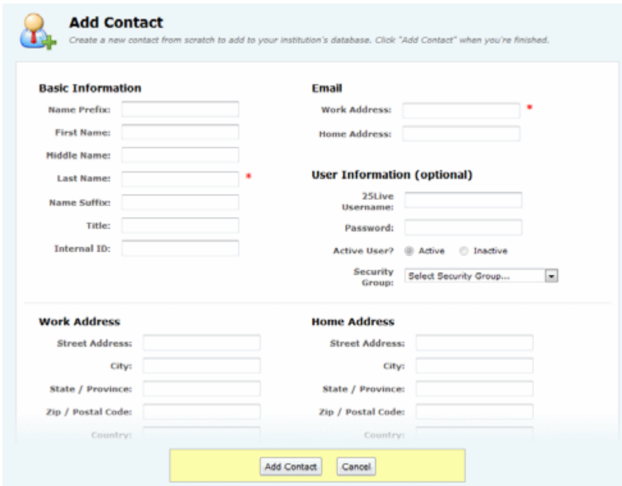
- Add contacts
- Copy contacts as the basis for creating new contacts
- Edit contacts one by one or multiple contacts simultaneously
- Delete contacts one by one or multiple contacts simultaneously

Guidelines for adding contacts

- Only Last Name and Work Email Address are required to add a contact.
- If the contact you're adding is a 25Live user, you also have to add their 25Live username and password and select their security group.
- Associate one or more organizations with the contact as needed.
- When selecting attributes of the contact, specify the value of each.

Adding contacts

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



Note: You must scroll down to see all the contact information you can specify.

2. Enter basic identifying information about the contact (last name is required) and the contact's work email address (required) and, optionally, their home email address.
3. If the contact is a 25Live user:
   - Enter his/her 25Live username and password. Passwords can only contain letters, numbers, and underscores.
   - Indicate whether the user is active (default) or inactive.
   - Select the user's 25Live security group.
4. Enter work and home address and phone information as needed, and enter any comments.
5. Associate one or more organizations with the contact as needed:
   - Click New Organization.
   - Select the contact's role in the organization, if any.
   - Find and select the organization.
   - If the contact is associated with other organizations, repeat these steps.
6. Check the custom attributes that pertain to the contact and enter or select the appropriate value for each.
7. Click Add Contact.

Copying 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.

Editing 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. To edit selected contacts in the displayed list, highlight the contact(s) and click Edit Selected.

   To edit all the contacts in the displayed list, click Edit All.

⚠	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 selected one contact, edit his/her information as needed. Click the "EDIT" link to expand sections that are closed.

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

⚠	• Editing the work email address of a 25Live user contact may break the connection between the user and your Active Directory. If you're unsure, check with your 25Live System Administrator. • Modifying the viewer25 user contact can have unintended consequences. Contact CollegeNET Technical Support before proceeding.

5. Click Save Changes.

Deleting contacts

⚠	Consider carefully before deleting contacts, because when you do the contacts are completely removed from your Series25 database, including all past actions taken on the contacts (event role designation, information edits, and so on), who performed them, and when. All information about the contacts, 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.
3. To delete selected contacts in the displayed list, highlight the contact(s) and click Delete.

   To delete all the contacts in the displayed list, click Delete All.
4. Click Delete Contact to confirm.
5. 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.

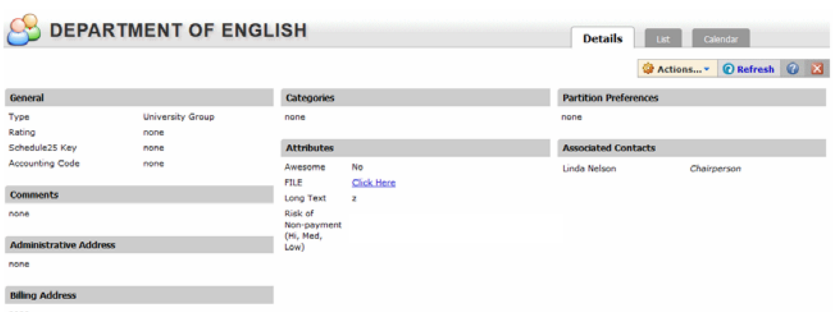
Types of organization data you can store

You can store a variety of information about each organization:

- Short name (required)
- Official title
- Abbreviation (Schedule25 key); 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

Organization example

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.



Organizations tab

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

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

Organization master definitions

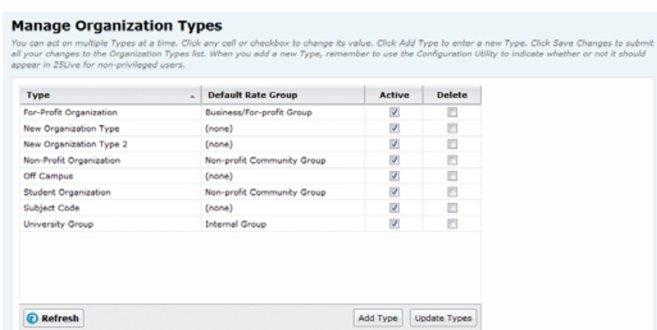
Description of organization master definitions

Some organization data comes from organization master definitions—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.

This organization master definition…	***Is a list of…***
Organization Categories	Ways you want to group organizations
Organization Custom Attributes	Additional organization data you want to track
Organization Types	The kinds of organizations and groups that may request, schedule, or sponsor events
Organization Ratings	Performance ratings organizations may have
Organization contact roles	Event roles contacts may perform for an organization

Organization definition example

This is an example of the Organization Types master definition.



Organization partition preferences

To effectively use the Schedule25 Optimizer, you should 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 preferred by departments and organizations.

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

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

Managing organization master definitions

Required functional security

Functional security required to manage organization master definitions:

Searches and Master Definitions: Organization = Can view, add and edit active and inactive master definitions

Organization master definition task tabs

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

System-supplied organization master definition items

25Live includes a number of system-supplied organization master definition items marked "[SYSTEM]" and grayed out. These items can't be edited or deleted, but can be deactivated.They include the following:

Master Definition	***Item***	***Purpose***
Organization Custom Attributes	X25 CIP Code	(not currently in use)
	X25 College	Used to specify a location's associated college, division, or professional school for X25 space analysis purposes.
Organization Contact Roles	Billing Contact	Used to designate the name of the contact who pushes events to FreshBooks invoicing.

Guidelines for adding organization master definitions

When adding this master definition...	*Follow these guidelines...*
Organization Categories	Create categories that make it easy for 25Live users to find and report on organizations. Create categories that assist in grouping events by sponsoring organization.
Custom Attributes	Create custom attributes that 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.
Ratings	Define as many ratings as you need, but try to keep them high-level—maximum of six is recommended. Create ratings that 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.

Adding or updating an organization master definition

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

Note: Be aware that all of the updates you make (item additions/deletions, label changes, activates/deactivates) are made simultaneously when you click Update.

To...	*Do this...*
Add an item	***1*** Click Add <item>. ***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.

To...	Do this...
Edit an item label	1 Click the list item to make it editable. 2 Use the arrow keys to position your cursor where you want to make changes. 3 Backspace as needed to delete characters. Enter characters as needed.
Activate or deactivate items	Check or uncheck the Active box of each item.
Delete items	Check the Delete box of each item.

3 Click Update <master definition>.

Managing organizations

Required functional security

Functional security required to add, edit, copy, and delete organizations:

- Organizations: Organization Access = Can view, edit, and create, Organizations tab appears in 25Live
- Organizations: Organization Delete = Can delete

Note: Users with functional security Organization Access = “Can view, edit, and create, Organizations tab appears in 25Live” can also create organizations in the 25Live Pro Event Form.

Manage Organizations task tab

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

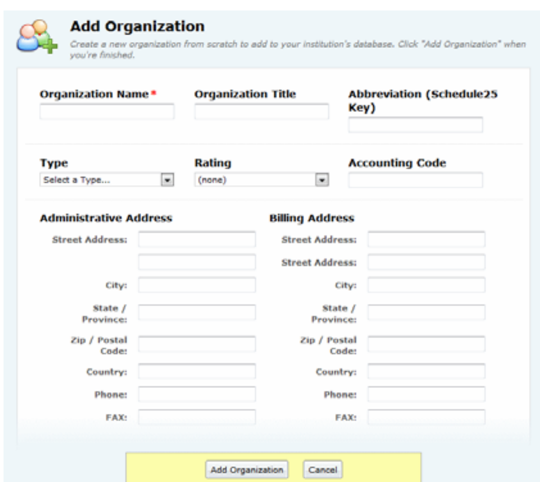
- Add new organizations
- Copy organizations as the basis for creating new organizations
- Edit organizations one by one or multiple organizations simultaneously
- Delete organizations one by one or multiple organizations simultaneously

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 the Organization Name for each department matches a data element in your SIS as defined in your Interface configuration; for example, "ENG" for the English department or "BIOL" for the Biology subject code.
- 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 definitions 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 25Live Pro Event Form. See "Managing organization master definitions"
- If you'll be using the Schedule25 Optimizer, you may add up to four partition preference groups for the organization. The Optimizer uses partition preferences to limit its location search to only the specific locations preferred by the organization. If you don't add partition preference groups, the Schedule25 Optimizer assumes all partitions are equal and will assign locations from any partition available to it.
- When selecting attributes of the organization, specify the value for each.
- Associate contacts with the organization as needed.

Adding an organization

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



Note: You must scroll down to see all the organization information you can specify.

2. Enter the organization name (required) and, optionally, the organization's title.
3. If you're using the Schedule25 Optimizer, enter the organization's Schedule25 Key. See the *Schedule25 Optimizer User Guide* available by clicking Help.

4. Select the organization's type, rating, and enter its accounting code as needed.
5. Enter administrative and/or billing address and phone information for the organization as needed.
6. To associate contacts with the organization:
   - Click New Contact.
   - Select the contact's role in the organization.
   - Find and select a contact.
   - Indicate whether or not this is the primary contact for the organization.
   - Repeat these steps for each additional contact you want to associate with the organization.
7. Enter any comments about the organization.
8. Check the categories the organization belongs to.
9. Check the custom attributes that pertain to the organization and enter or select the appropriate value for each.
10. If you'll be using the Schedule25 Optimizer, add at least one partition preference group for the organization (you can add a maximum of four):
    - Click New Preference Group.
    - Check the partitions you want to comprise this partition preference group.
    - Add additional partition preference groups (four maximum) by repeating the first two bullet steps. You can remove a partition preference group at any time by clicking its Remove icon (red X).
    - To change the priority of the partition preferences group, click the up/down arrow icon of each group as needed until you get the priority order you want.
11. 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.
12. Click Add Organization.

Copying 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 or public 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.

6. Modify the object security and/or notification policy of the new organization as needed. See the *25Live Security Administration Guide,* accessible by clicking Help, for information on performing these tasks.
7. Edit the partition preferences of the new organization as needed.

To...	***Do this...***
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.

8 Click Add Organization.

Editing 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 or public search.

Note: Selecting "All Organizations" is not recommended because of the large amount of data that could be returned.

3. To edit selected organizations in the displayed list, highlight the organization(s) and click Edit Selected.

   To edit all the organizations in the displayed list, click Edit All.

   Organizations you have permission to edit have a "Yes" in the Can Edit? column of the location list.

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 selected one organization, edit its information as needed. Click the "EDIT" link to expand sections that are closed.

   If you selected 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.
5. Modify the object security and/or notification policy of the organization as needed. See the *25Live Security Administration Guide,* accessible by clicking Help, for information on performing these tasks.
6. Edit the partition preferences of the organization as needed. For instructions, see step 7 of "Copying an organization" above.
7. Click Save Changes.

Deleting organizations

⚠	Consider carefully before deleting organizations, because when you do the organizations are completely removed from your Series25 database, including all past actions taken on the organizations (designations as an event's primary organization, information edits, and so on), who performed them, and when. All information about the organizations, 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 or public search.

Note: Selecting "All Organizations" is not recommended because of the large amount of data that could be returned.

3. To delete selected organizations in the displayed list, highlight the organization(s) and click Delete.

   To delete all the organizations in the displayed list, click Delete All.
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 diagrams that can be associated with locations and resources.

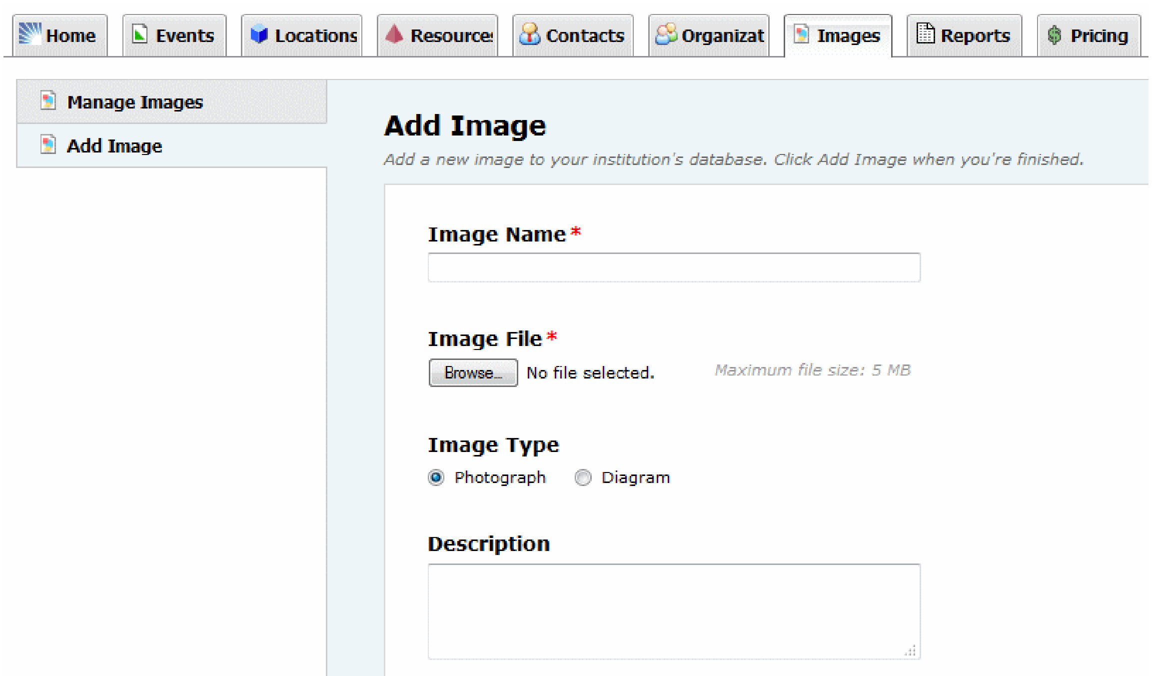
Note: If you want to associate images with resources, in addition to adding resource images to this library, you must also set up an Image data type resource custom attribute (see "Guidelines for adding resource master definitions").

	Required functional security Functional security required to add and edit images: Locations: Layouts and Images = Can view, edit and add images

Adding images

Add Image task tab

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



Adding an image

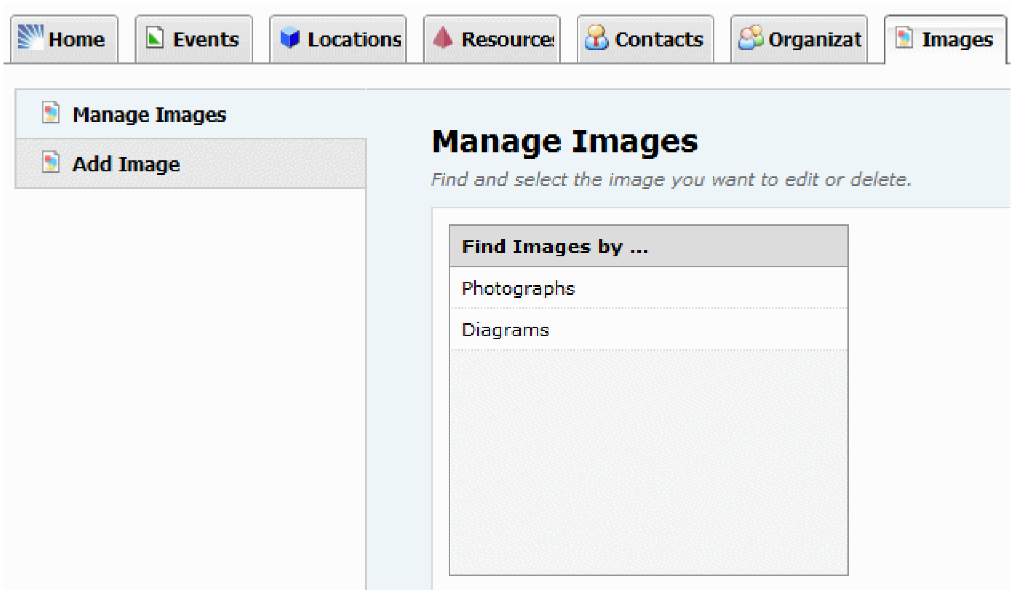
1. With the Add Image task tab selected, enter a name for the image and browse to and select the image. Maximum image size allowed is 5 MB.
2. Indicate whether the image is a photograph or a diagram.
3. Enter a description of the image (optional).
4. Click Add Image.

Managing images

Manage Images task tab

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

- Edit images
- Delete images



Editing 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.

Deleting 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.

Report Scheduling Data Administration

Reports tab

The ***Reports*** tab of the Administration Utility lets you schedule reports for automatic generation and email delivery.

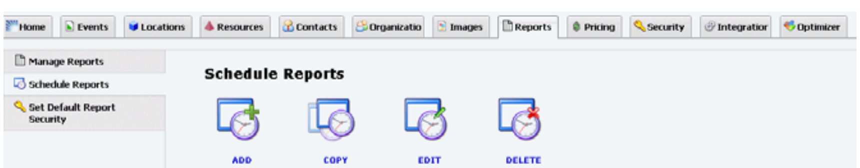
Report scheduling

	Required functional security Functional security required to schedule reports: Tasks, Reports, and Email: Report Access = Can add, delete and modify custom reports

Schedule Reports task tab

Use the ***Schedule Reports*** task tab to:

- Add report schedules
- Copy a report schedule as the basis for creating a schedule for another report
- Edit report schedules
- Delete report schedules



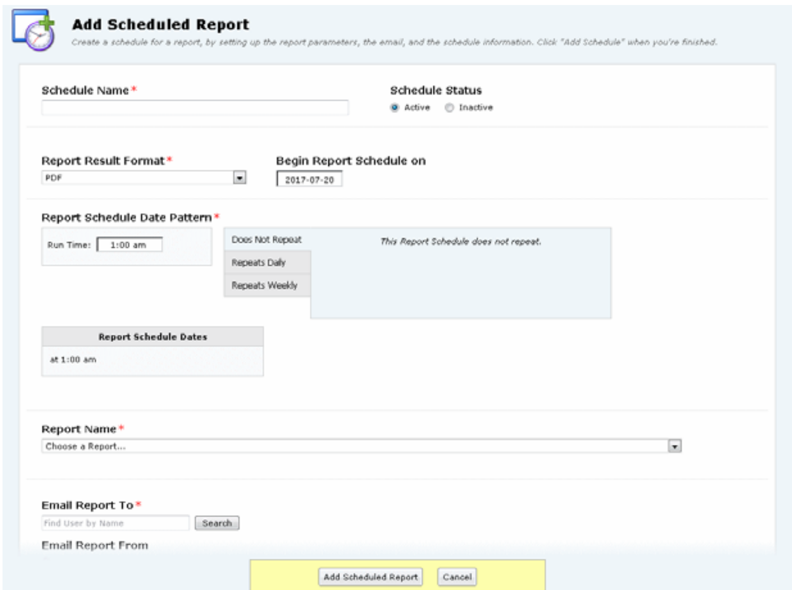
Guidelines for adding a report schedule

- You can only schedule standard reports or custom reports that were created by copying and modifying a standard report using the Interactive Reports Report Engine.
- The Begin Report Schedule On field is set to tomorrow's date by default, so you can't set a report schedule to begin today.
- Report schedule repeat options are limited to daily and weekly. If you need to set up a report to run monthly, set the weekly repeat option to every fourth week.

- If the report you're scheduling has a Report Date, Start Date, and/or End Date parameter field, use these fields to enter how many days of data from the scheduled date the report should include. For example, if the report you're scheduling has Start Date and End Date parameter fields, and you want the report run weekly on Monday and to show data for the previous Monday - Friday, you'd enter -7 in the Start Date field and 5 in the End Date field.

Adding a report schedule

1. With the Manage Schedule Reports task tab selected, click the ADD icon to go to the Add Scheduled Report page.



Note: You must scroll down to see all the schedule information you can specify.

2. Enter a name for the schedule and indicate whether the schedule is active or inactive (the default is active).
3. Choose the format you want for the generated report from the Report Result Format drop-down list.
4. Enter the date you want the schedule to begin, or click and choose the date using the calendar control.
5. Click Run Time, and choose the time you want the report generated.
6. If you want the report to be generated on a daily or weekly schedule, click the appropriate tab (Repeats Daily or Repeats Weekly) and choose the daily interval or days of the week.The schedule pattern you've selected is shown in the Report Schedule Dates box.
7. Choose the report this schedule applies to from the Report Name drop-down list.
8. If the report has a Report Parameters section, enter and/or select parameter values. For example, if the report has a Start Date parameter, enter the number of days of data prior to the scheduled report run date that should be included in the report (see *"Guidelines for adding a report schedule"*), or if the report has a Location Search parameter, choose the location search you want from the drop-down list.

9. In the Email Report To area, enter the full or partial name of the 25Live contact you want the generated report emailed to, click Search, then select their name from the drop-down list. If you need to redo the search, click the Redo Search button. To send the report to multiple contacts, enter their email addresses in the name field, separated by commas.
10. Repeat step 9 in the cc and bcc areas as needed to copy and blind copy other contact recipients.
11. Select whether you want the email to come from you or another 25Live contact ("someone else"). If you selected "someone else," enter the full or partial name of that person, click Search, then select their name from the drop-down list. If you need to redo the search, click the Redo Search button.
12. Enter the Subject and Body of the email you want sent. The generated report will be attached to this email.
13. Click Add Scheduled Report.

Copying a report schedule

1. With the Schedule Reports task tab selected, click the COPY icon.
2. Find the report schedule you want to copy by selecting All Scheduled Reports or My Scheduled Reports (schedules you've created), highlighting the schedule, then clicking Copy.
3. Enter a new recipient name and/or email addresses for the schedule and change other information as needed.
4. Click Add Scheduled Report.

Editing a report schedule

1. With the Schedule Reports task tab selected, click the EDIT icon.
2. Find the report schedule you want to edit by selecting My Scheduled Reports, highlighting the schedule, then clicking Edit. You can only edit report schedules you've created.
3. Edit the schedule information as needed.
4. Click Save Changes. (right button name?)

Deactivating a report schedule

1. With the Schedule Reports task tab selected, click the EDIT icon.
2. Find the report schedule you want to deactivate by selecting My Scheduled Reports, highlighting the schedule, then clicking Deactivate. You can only deactivate report schedules you've created.
3. Click Deactivate to confirm.

Deleting a report schedule

1. With the Schedule Reports task tab selected, click the DELETE icon.
2. Find the report schedule you want to delete by selecting My Scheduled Reports, highlighting the schedule, then clicking Delete. You can only delete report schedules you've created.
3. Click Delete Report Schedule to confirm.

Integration Data Administration

Integration tab

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

- Set 25Live Publisher options
- Set SIS import/export options if using the Series25-SIS (TCS) legacy interface
- Set security group options to support third-party authentication for single sign-on
- Enable or disable automatic task notification emails and, if enabled, specify for each security group the types of tasks to be included and notification intervals

> ***Required security***
>
> To use the functions available from the Integration tab, you must be in the System Administrators (-1) security group.

Using the Integration tab

1. Click the task tab you want (see below).
2. Set options or specify settings as described below.
3. Click Save Changes.
4. Repeat these steps for other task tabs as needed.

Publisher task tab

Use the ***Publisher*** task tab to specify 25Live Publisher settings.

Use this option...	***To specify...***
Default Publisher Display Options	The feed options to display in the Send Events to 25Live Publisher window to let the Publisher user specify: Whether the event name (the default) or the event title is displayed in published calendars Whether or not event occurrences are published if they don't have a location assignment Whether the location short name (the default) or the location formal name is displayed Whether or not reservation comments are included in the feed Whether or not setup and takedown times are displayed for events

Use this option...	*To specify...*
Event Publishing Date Range	The date range of events to include when publishing feeds for selected events. ***Note:*** The larger the date window, the more slowly the Publisher updates.
Events-By-Location Publishing Date Range	The date range of events to include when publishing event feeds for selected locations. ***Note:*** The larger the date window, the more slowly the Publisher updates.

To learn more about publishing calendars fed and maintained by 25Live and formatted and published via the 25Live Publisher, see the *25Live Guide to Publishing Calendars*, available here:

http://knowledge25.collegenet.com/display/CustomerResources/25Live+Documentation

SIS Import/Export task tab

Use the ***SIS Import/Export*** task tab to specify basic settings that apply to the legacy Series25-SIS (TCS) Interface and the Ellucian Colleague Interface to Series25.

Note: These settings do not apply to the Series25 LYNX interface which contains its own settings pertinent to its internal processes. These settings only affect vCalendar files imported or exported via legacy Series25-SIS (TCS) Interface products or stand-alone web services.

Use this option...	*To specify...*
Automatically generate a REPLY:	Whether or not a vCalendar REPLY file should be automatically generated for imported sections with a location assignment and a Tentative or Confirmed event state. Set to "For Tentative and Confirmed event states" if you are importing section data in unlocked transactional processing mode, or if you're using a different transactional processing mode and want automatic generation of REPLY files. Set to "No event states" if you don't want the automatic generation of REPLY files.
Use LOCATION settings for this Student Information System:	The SIS you're using, which determines how to set the LOCATION property style.

Use this option...	*To specify...*
Academic Priority Location Assignments: (SaaS only)	Whether or not imported sections should take precedence over non-academic events in location assignment. Set to “On,” if you want imported sections with a pre-assigned location to be assigned that location, even if there is a non-academic event with the same location assignment for some or all of the same dates/times. The location assignment of the non-academic event will be dropped, and the event's scheduler will be notified via email. Set to “Off” if you don’t want sections to take precedence over non-academic events in location assignment.
When not all dates are available for a location: (SaaS only)	What to do when an imported section with a pre-assigned location encounters a previously imported section that has been assigned the same location at the same dates/times for some or all of its occurrences. Set to “Assign the location anyway,” if you want imported sections to have their pre-assigned location assigned to just the available occurrences, which could result in some of the section's occurrences not having a location assignment. Set to “Do not assign the location,” if you want imported sections to have their pre-assigned location assigned only if it is available for all section occurrences. This setting is also dependent on the Academic Priority setting.
Manage imported cancelled sections by:	How cancelled sections imported from the SIS should be handled—change their event state to cancelled or delete them.
Type of interface used:	Whether to clear all reservations on a TRANSP:1 import. If you’re using any interface other than the Universal Controlled Processing (datain.dat) interface, select the “Typical vCalendar interface...” option. If you’re using the Universal Controlled Processing interface, select the “Datain.dat interface...” option.
Asynchronous vCalendar email notification:	How often and under what circumstances the Asynchronous vCalendar import process should email authorized users during processing. ***Note***: Each group of sections processed by the import contains approximately 200 sections.
Asynchronous vCalendar Academic Priority email recipients:	Your preference for email notification when the Academic Priority Location Assignments option trumps existing location assignments.

Authentication task tab

Use the ***Authentication*** task tab to specify security group options for use when user authentication is performed via a third-party scheme such as Shibboleth or LDAP.

Note the following:

- Any new user submitted to 25Live will be placed in the default security group you specify here, unless the user is passed in with a valid security group that already exists in the Series25 database.
- Two options are available for existing 25Live users (except for current system administrators):
  - Move the user from their current security group to any new group submitted with the user, as long as the security group already exists in the Series25 database.
  - Ignore any passed-in security group, so the user remains in their current 25Live security group.

Note: Any existing user already in the 25Live System Administrators security group (ID = -1) will never be moved from that group, regardless of the option selected here—even if a different, valid security group is passed in with that user.

Email Settings task tab

Use the ***Email Settings*** task tab to enable or disable automatic email task notifications and, if enabled, set time intervals for each security group to receive assignment policy, notification policy, To Do, and "all tasks completed" notification emails.

To enable and set automatic email notifications by security group

1. Click "***Enable*** Automatic Email notifications."
2. For each security group, select how often that group should receive email notifications when tasks of these types—Assignment Policy, Notification Policy, and To Do—are added, completed, or updated. For each task type, select one of these options:
   - None—Don't send task emails
   - Five Min.—Send a task summary email every 5 minutes
   - Daily—Send a task digest email every night

3. If you have designated default schedulers by security group in the Configuration Utility or by location in the Administration Utility, select how often default schedulers should receive email notifications when all tasks associated with events they're responsible for have been completed.
   - None—Don't send all tasks completed emails
   - Five Min.—Send all tasks completed emails every 5 minutes
   - Daily—Send an all tasks completed digest email every night

⚠	If you have not designated default schedulers by security group or by location, we recommend you choose None for this setting. If set to something other than None, users will receive all tasks completed emails for every event they create that has associated tasks.

4. Click Save Changes.

Note: You can also simultaneously set all security groups the same for a particular task type by choosing an option from the "Set all security groups to:" drop-down.

To disable automatic email notifications for all security groups

1. Click "***Disable*** Automatic Email notifications."
2. Click Save Changes.

