Inline Editing Location Details

Activating Edit Mode

Image: Details views feature a toggle to allow inline editing.

Use the **Edit Mode** toggle at the top of any event, location, resource, or organization details view to turn on or off the

ability to edit fields inline. When the toggle is on, edit icons appear next to many fields. Turn the toggle off to protect fields from accidental edits.

Guidelines for Adding Locations

- Because the location name or formal name appears in event web calendars you publish using the 25Live Publisher, make sure these names 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 Event Form

- 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 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, enable Express Scheduling, choose an Event Type, and optionally enter a Maximum Event Duration. For more information

- 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 custom 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
    - X25 Assignable Area
    - X25 Building
    - X25 Owner Organization
    - X25 Floor Number

Types of Fields

Formal Names of Objects

Animation: Hover your cursor over the field to reveal the editing option.
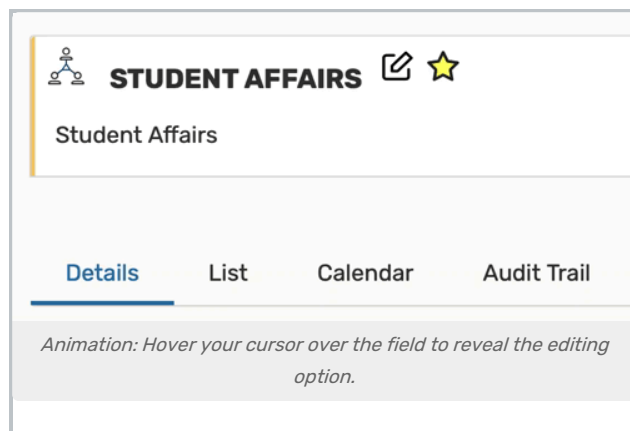
The formal name field for locations, resources, organizations, or contacts can be edited by hovering your cursor over the name to reveal the editing icon (📝) option.

Text-Based Fields

Animation: Use the edit icon to change text-based fields inline from the details view.

For text-based fields, use the edit icon 📝 to enter the editing mode, make changes, and then use the **Save** button. The **Cancel** button is available to exit editing mode without saving changes.

Administrative Address ⌃

123 Street Ave.
Portland , OR 97205 U.S.
p: 555-555-1111

Billing Address ⌃

Street Address

805 SW Broadway, Suite 1(

City

Portland

State / Province

OR

Zip

97205

Country
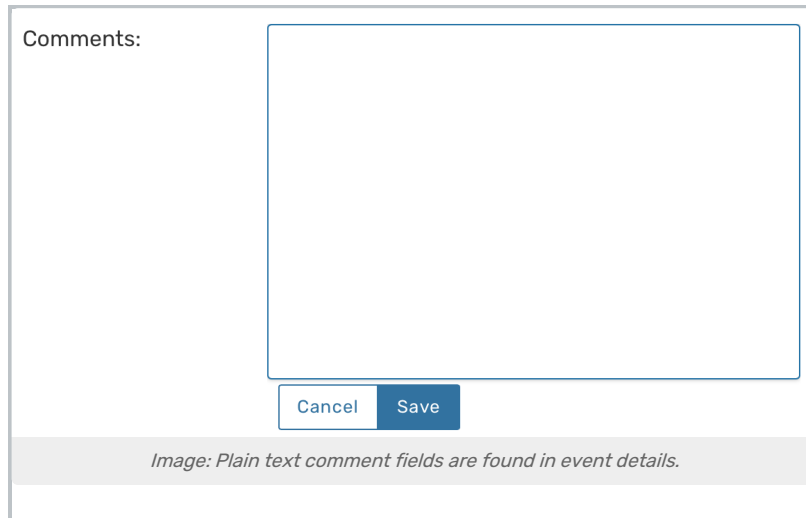
U.S.

Phone

503-555-2222

Fax

503-555-3333

Save   Cancel

Image: Multi-line text fields can also be changed using the edit icon.

The same edit icon   appears next to multi-line fields, like addresses, to allow editing.
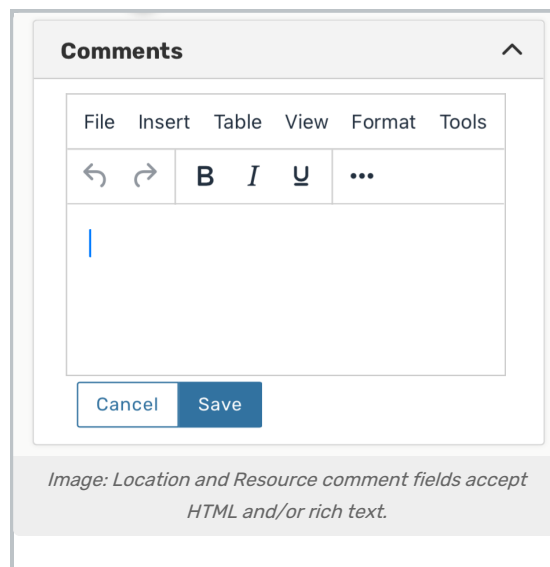
Editing Large Text Fields

Image: Plain text comment fields are found in event details.

Some comment fields are large text fields and can only display plain text, such as those used in event details.

Image: Location and Resource comment fields accept HTML and/or rich text.

Some comment fields use rich text editors for inline editing that can render styles, images, and some HTML (such as links or embedded elements). Examples of uses include adding emphasis to text, images of resources, or 360-degree views of locations. Look for the rich text menus and controls to tell if the field accepts styled elements.

Image URL Fields

Image: If you need to edit an image attached to a custom attribute, use the Edit link.
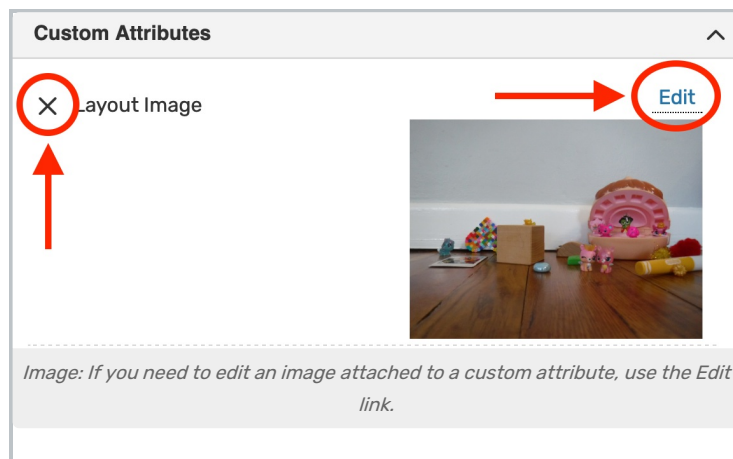
An image attached to a custom attribute can be edited inline by using the **Edit** link above the image. You can then enter the URL of a hosted image.

Remove the image with the **X** link above-left of the image or a **Remove** link.
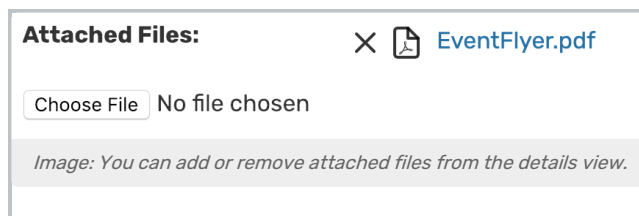
Dropdown Menu Fields

To edit any fields in Details views displayed as a drop-down menu, simply tap or click on the menu and then scroll to select a choice. Some fields, such as **Event Type**, contact roles such as the **Scheduler** and **Requestor**, and **Organization** use a search field to make selecting your choice easier.

Image: Some fields use a dropdown search field to allow inline editing.
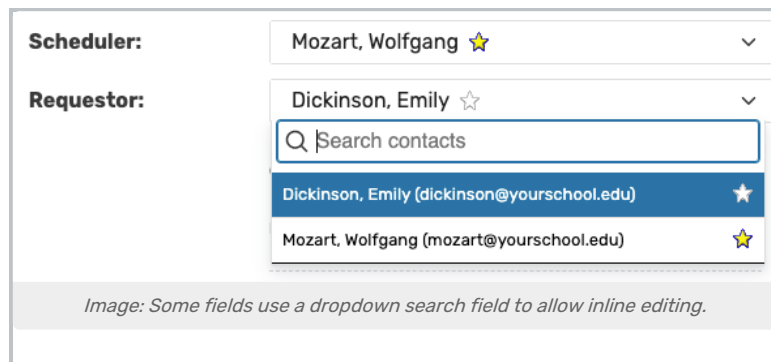
Changes will be saved immediately upon closing the menu.

Attached Files

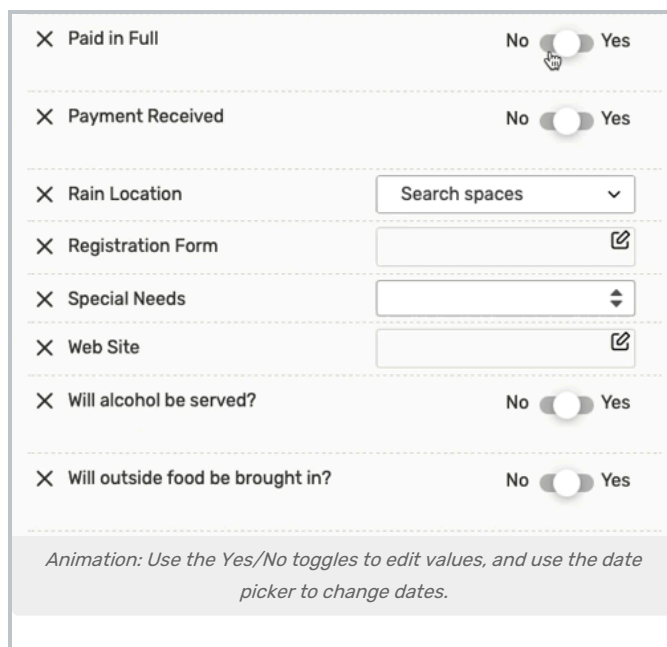Image: You can add or remove attached files from the details view.

To remove the listed attached files, use the X icon. However, be aware that removing files is an immediate and irreversible action. Use the **Choose File** button to attach additional files to the event.

Multiple Selections (such as Categories)

Use the **Add** link in the Event Categories section to reveal a category list with checkboxes. Select as many as are needed then use the **Done** button to save your changes.

Toggled, Date-Based, Text, and Select Fields

Many fields have toggle or date controls, such as Custom Attributes.
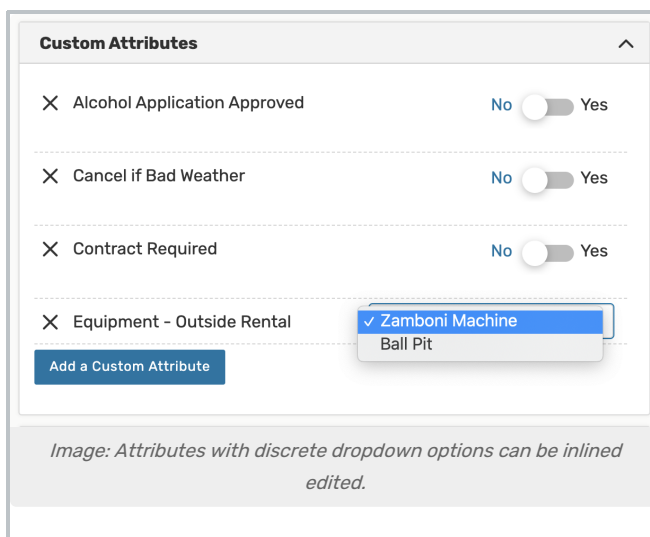

Animation: Use the Yes/No toggles to edit values, and use the date picker to change dates.

Fields with a yes/no choice can be set on or off using the sliding toggle. When adding a new custom attribute, you must set the toggle before the attribute is saved as added. Simply tap or click on a date to select a new date. Type values into text fields. Select from dropdown lists. Changes will be saved immediately.

Custom Attribute with Discrete Dropdown Options

*Image: Attributes with discrete dropdown options can be inlined edited.*

Administrators can define discrete dropdown options for user-defined event custom attributes of the text type in System Settings. To change options, choose from the list. Changes will be saved immediately.

Relationship Fields

Animation: There are a few simple steps to add relationships to a resource.

Location relationships allow you to 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:

- **Also Assign** – Other locations that are also automatically assigned to an event when this location is assigned
- **Blocked By** – Other locations, that if already assigned for the same date and time, "block" (prevent) this location from being assigned
- **Close To** – Other locations that are close to this location. You determine what "close to" means.
- **Divides Into** – Other locations that are subdivisions of this location and, therefore, can't be assigned for the same date and time
- **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

Image: Steps for adding related spaces for a location are very similar.
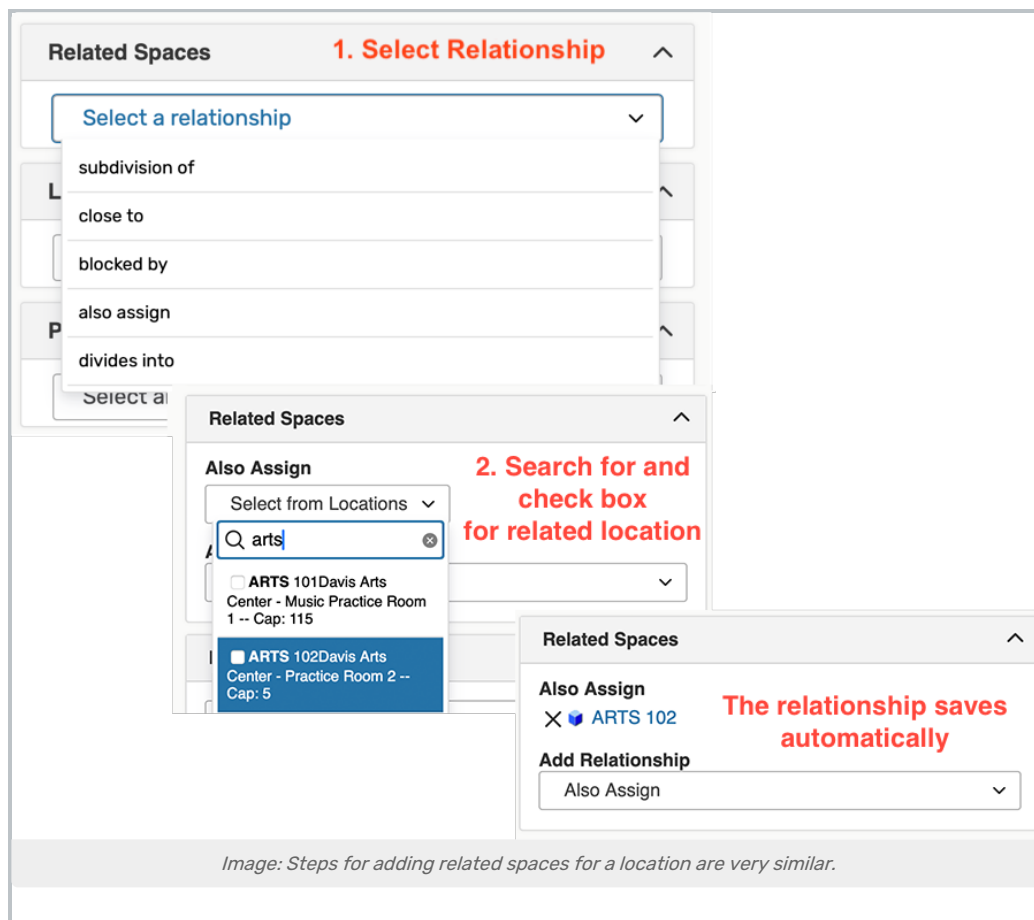
Use the **Add Relationship** dropdown selection, and select the relationship type. A search will appear. Find the related location and check its checkbox. The relationship will save automatically when you move your cursor or select another item. To remove a relationship, use the **X** next to the related object.

Notification Policy

Locations, organizations, and resources can set notification policy, which generates tasks for specific users when those objects are added to an event.

To configure notification policy, select the following before clicking **Save**:

1. The Approval Type
2. The deadline for approval
3. The user(s) who will receive the notification tasks
4. The notification style for each user

For more information on these options, see Notification Policy in 25Live.

Image: Select details and click "Save" to configure notification policy

Special Field Types for Locations

Hours

Image: Find an example of toggled fields in the Location Details Hours section.

In Location Details, toggles are used in the **Hours** section to allow a quick, convenient way to mark a location as **Always Closed** or **Always Open** rather than manually typing the hours. Note that when hours are typed in, the toggle moves to the middle position.

Layout Details and Images

Image: Default location layouts can also be edited inline with a dropdown menu.

You can edit the **Max Capacity** for the location in this subsection.

Each existing layout is listed with edit icons for the layout's **Cap**acity, **Setup** time, and **Takedown** time. You may also remove existing layouts using the "**X**" icon. Each layout's name is a link you may use to access more details, including images, diagrams, and instructions.

Use the **Add Layout** dropdown menu to add a new layout for the location.
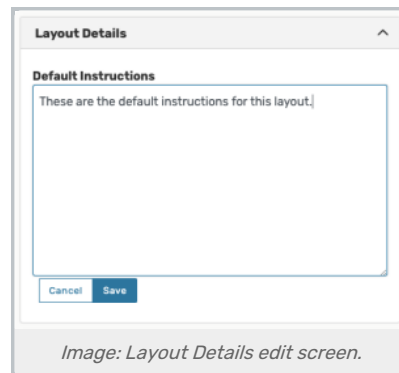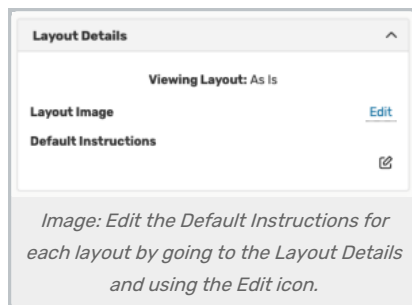

Image: When adding Location Layout diagrams or photos, you can choose to Select or Upload a new image.

When adding images/diagrams, you will have a choice to toggle between the ability to:

- **Select** - Use the links in the list to choose an image from your 25Live library
- **Upload** - Use the fields to type an **Image Name**, **Image Description**, then use the **Upload a file** button to add a new image

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Image: Edit the Default Instructions for each layout by going to the Layout Details and using the Edit icon.


Image: Layout Details edit screen.

The **Layout Details** section also uses large text fields to allow adding, editing, or removing **Default Instructions** for each layout. This field only uses plain text.

How To Configure a Location For Express Scheduling

The location details view provides an inline editable capability to configure a location to be used with Express Scheduling.

Image: The Express block without any configuration options set.
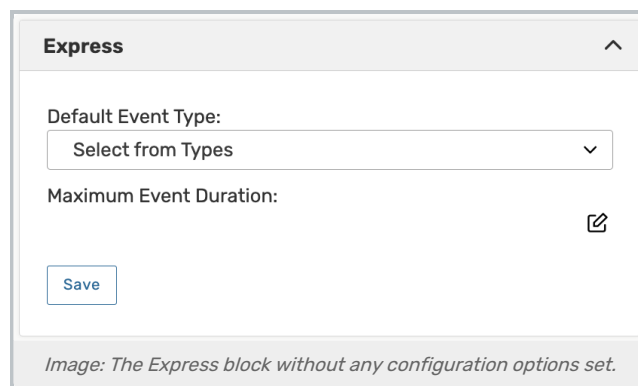
- Scroll down to find the **Express** block in the location details view.
- Select a **Default Event Type** to be applied to this location for new express events.
- Use the ✎ edit icon to set the **Maximum Event Duration** allowed for express events in this location.

Image: An example Express block with the options set.
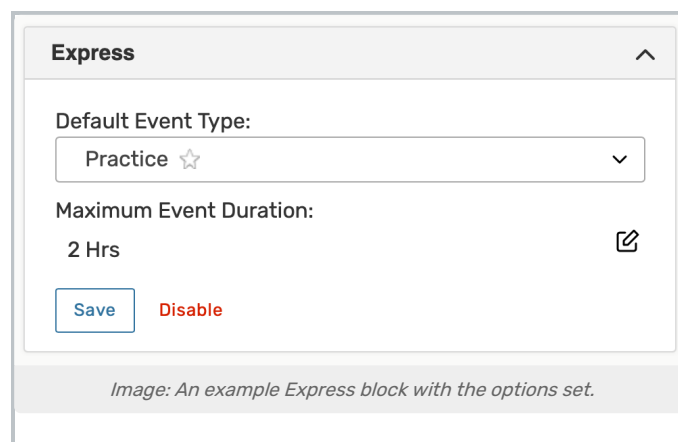
Express Scheduling does not bypass Object Security or Assignment Policy. Users reserving a location using Express

Scheduling must have object security permission to see and assign the location, and the Assignment Policy for the location must be set to Assign/Unassign or higher. You may want to adjust location security settings.