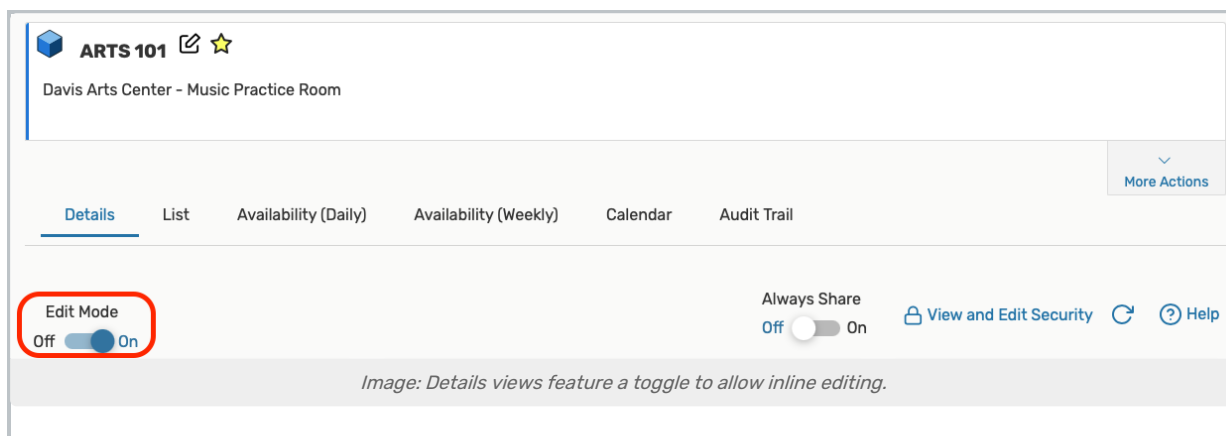


## Inline Editing Resource Details

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## Activating Edit Mode



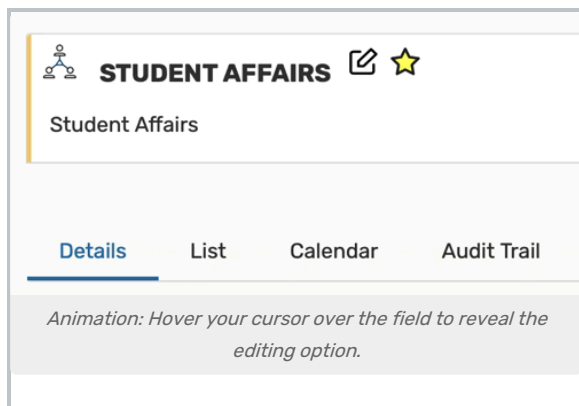
Use the **Edit Mode** toggle at the top of any event, location, resource, or organization details view to turn on or off the ability to edit fields inline. When the toggle is on, edit icons appear next to many fields. Turn the toggle off to protect fields from accidental edits.


## Guidelines For Adding Resources

- 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 Event Form

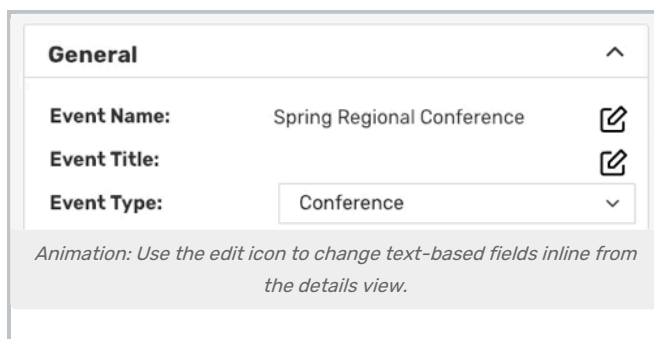
## Types of Fields


### Formal Names of Objects




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



For text-based fields, use the edit icon  to enter the editing mode, make changes, 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 100

City  
Portland

State / Province  
OR

Zip  
97205

Country  
U.S.

Phone  
503-555-2222

Fax  
503-555-3333

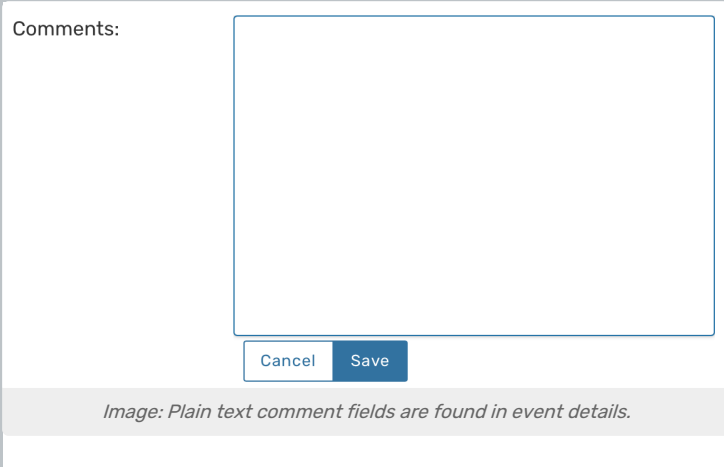
Save

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



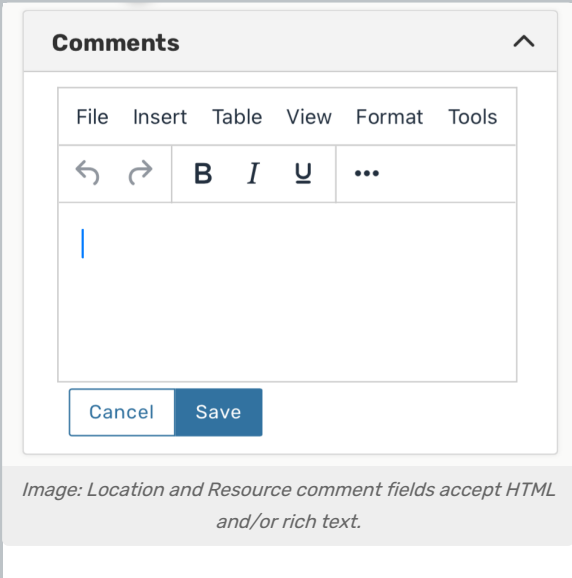
Comments:

A large, empty rectangular text input field with a thin blue border.

Cancel Save

*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.



**Comments** ^

File Insert Table View Format Tools

↶ ↷ **B** *I* U ...

A large, empty rectangular text input field with a thin blue border.

Cancel Save

*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

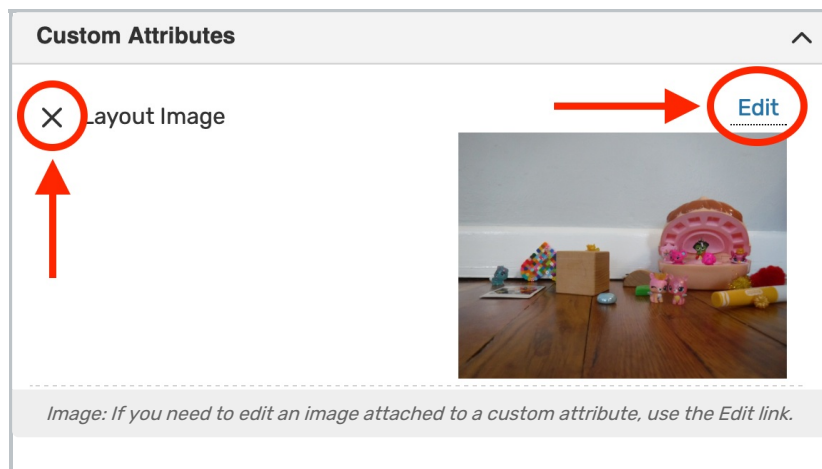
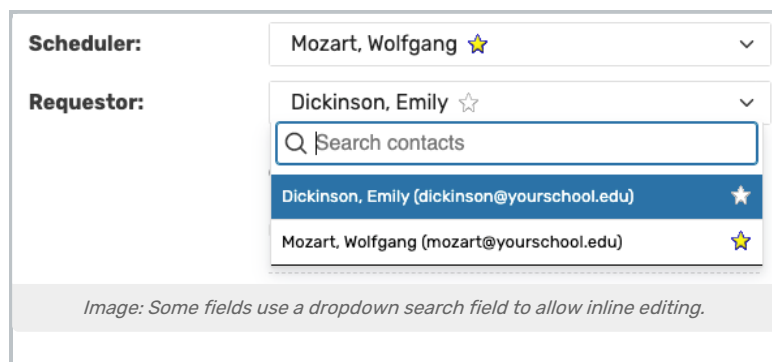


Image attached to custom attribute can be edited inline by using the **Edit** link above the image. You can then enter the URL of a hosted image.

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

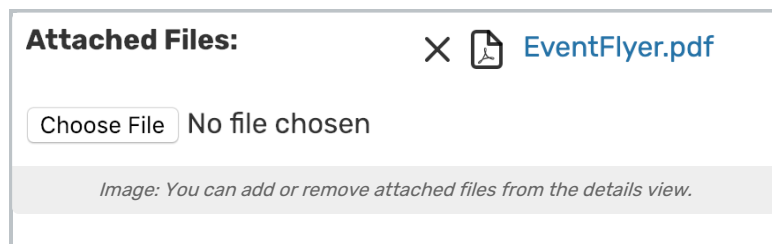
## Dropdown Menu Fields

To edit any fields in Details views displayed as a drop-down menu, simply tap or click on the menu 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.



Changes will be saved immediately upon closing the menu.

## Attached Files



To remove 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.

A screenshot of a form titled 'Custom Attributes' with a close button (X) in the top left. The form contains several fields:

- Paid in Full:** A toggle switch set to 'No'.
- Payment Received:** A toggle switch set to 'No'.
- Rain Location:** A dropdown menu with 'Search spaces' selected.
- Registration Form:** A text input field with a document icon.
- Special Needs:** A dropdown menu.
- Web Site:** A text input field with a document icon.
- Will alcohol be served?:** A toggle switch set to 'No'.
- Will outside food be brought in?:** A toggle switch set to 'No'.

At the bottom, there is a note: *Image: 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

A screenshot of a form titled 'Custom Attributes' with a close button (X) in the top left. The form contains several fields:

- Alcohol Application Approved:** A toggle switch set to 'No'.
- Cancel if Bad Weather:** A toggle switch set to 'No'.
- Contract Required:** A toggle switch set to 'No'.
- Equipment - Outside Rental:** A dropdown menu with 'Zamboni Machine' selected. Below the dropdown, 'Ball Pit' is visible.

At the bottom left, there is a button labeled 'Add a Custom Attribute'. At the bottom, there is a note: *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

Locations and resources can have defined relationships to other locations and resources, which can be added through inline editing in details views.

Use the **Add Relationship** button to start. Select the relationship type, then search to find the related item. Save your choices with the **Done** button. To remove a relationship, use the **X** next to the related object.

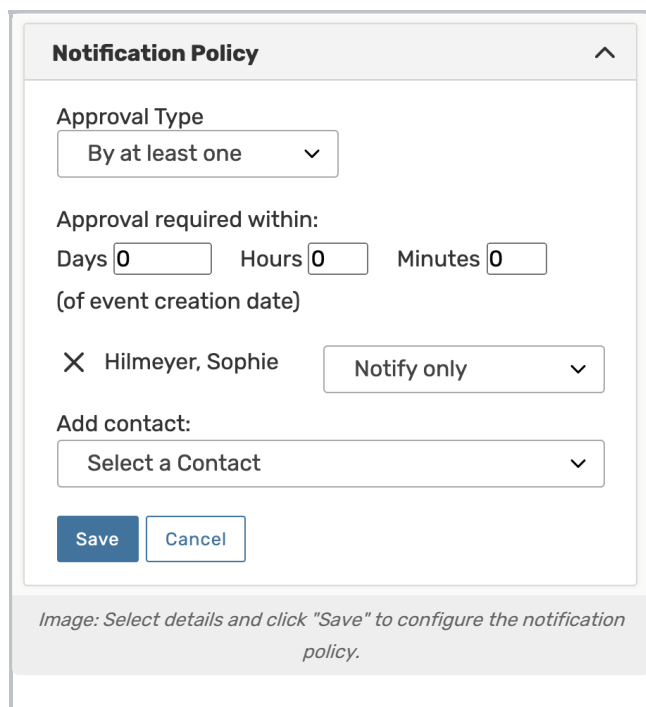
## Notification Policy

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](#).

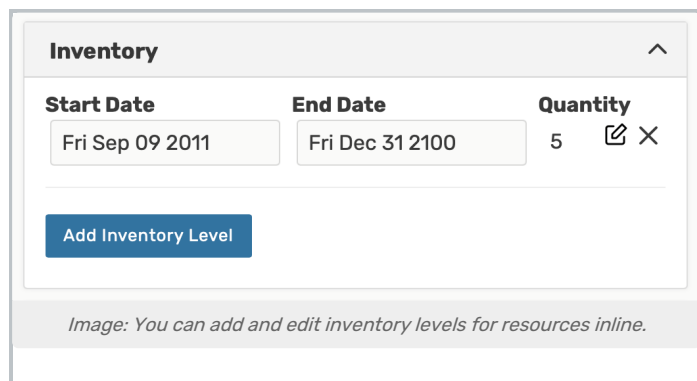


The screenshot shows a 'Notification Policy' dialog box with the following fields and controls:

- Approval Type:** A dropdown menu currently set to 'By at least one'.
- Approval required within:** Three input fields for 'Days', 'Hours', and 'Minutes', all set to '0'. Below these is the text '(of event creation date)'.
- User Selection:** A row with a close button (X), the name 'Hilmeyer, Sophie', and a dropdown menu set to 'Notify only'.
- Add contact:** A dropdown menu with the text 'Select a Contact'.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom.
- Footer:** A note that reads 'Image: Select details and click "Save" to configure the notification policy.'

## Special Field Types for Resources

### Inventory



The screenshot shows an 'Inventory' dialog box with the following fields and controls:

- Start Date:** A date field set to 'Fri Sep 09 2011'.
- End Date:** A date field set to 'Fri Dec 31 2100'.
- Quantity:** A field set to '5' with an edit icon (pencil) and a close icon (X).
- Buttons:** An 'Add Inventory Level' button.
- Footer:** A note that reads 'Image: You can add and edit inventory levels for resources inline.'

Use the **Add Inventory Level** button to add a new date range and quantity.



After an inventory level is added, fill in the **Start Date**, **End Date**, and the edit icon to edit **Quantity** for the inventory date range. For a single inventory level, add a date range with a far-future end date. Inventory date ranges cannot overlap.

*Note: The End Date is inclusive, so if the end date is 12/31/2035, the resource will be available until the end of 12/31/2035.*

The "X" icon will remove an inventory level.



### Tip: Remove the Value for Unlimited Quantity

Use the "X" icon to remove the numeric inventory value if you want to show an unlimited quantity.

You can also add inventories for different date ranges. For example:

- If the regular quantity of a resource is 100
  - Then, you add a date range when that item is limited of September 1 - September 30 with a quantity of 2
  - Anything before that date range may show 100 available, while an event requesting the resource during the date range could show 2 available
-