Inline Editing Contact 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.
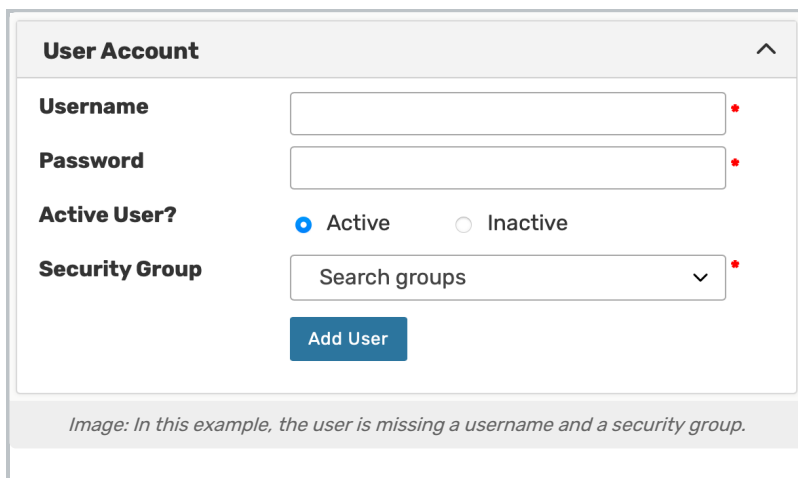
Guidelines For Adding Contacts

- Only Last Name and Work Email Address are required to add a contact
- If the contact you're adding is a Series25 user, you also should add a security group
- Associate one or more organizations with the contact as needed in the details

> ⚠️ **Warning**
>
> Editing the work email address of a 25Live user contact may break the connection between the user and your SSO. If you're unsure, check with your 25Live System Administrator.

Adding a Username, Password, and Security Group

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Image: In this example, the user is missing a username and a security group.

If you have a user in your Series25 database that is **missing** a username and/or security group setting, you can see those fields missing when viewing their contact details.

Administrators with permission can add a **Username**, **Password**, and **Security Group** for a user missing those fields. Use the **Add User** button to save changes.

For directions on editing your own password, please see *Working with User Settings*

For directions on updating an existing password on behalf of another user, please see *Editing a Password in Group Administration*

> ✓ **Tip**
>
> Contacts can also be created in Series25 Group Administration when **Adding Users to Security Groups** or **Creating Contacts**.

Changing a User's Security Group

Find the **User Account** section, and use the **Security Group** search-select field to change a user's security group.

> ⚠️ **Warning: Be Very Careful Changing a User's Security Group**
>
> Changing a security group for a user has many consequences and could interrupt workflows. Only change the security group after double checking everything the user does in your Series25 applications.

Image: The User Account section has fields for changing a user's security group as well as activating or inactivating a user.

Activating and Inactivating a User

In the **User Account** section, you can use the **Active User?** field to mark a user as active or inactive.

Updating a Contact's Additional Roles

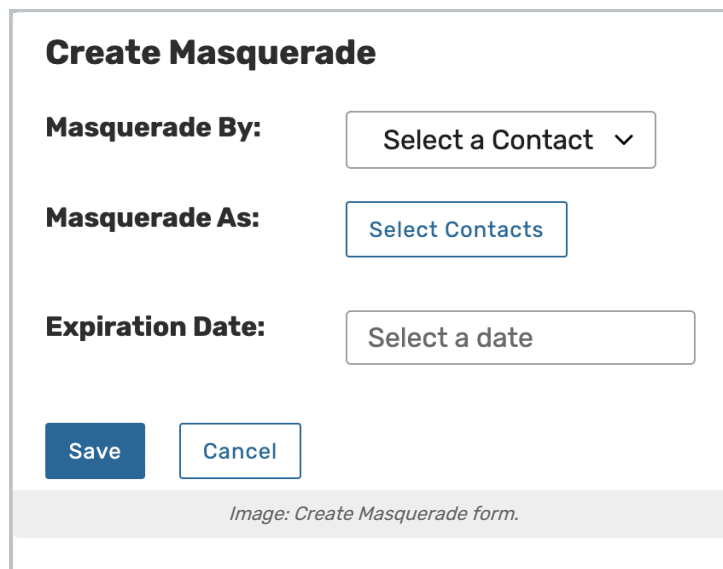These configurations control whether this user can [masquerade](#) as other users.

Image: Additional Roles panel on the Contact Details page.

- Use the **Show Expired** checkbox to display past masquerade mapping for this user.
- Tap the date on a row to update it to a new expiration date.
- Use the **x** to delete a row.
- Select **Add New Contact** to select additional users for this contact to masquerade as.
  - Fill out the form and **Save**.
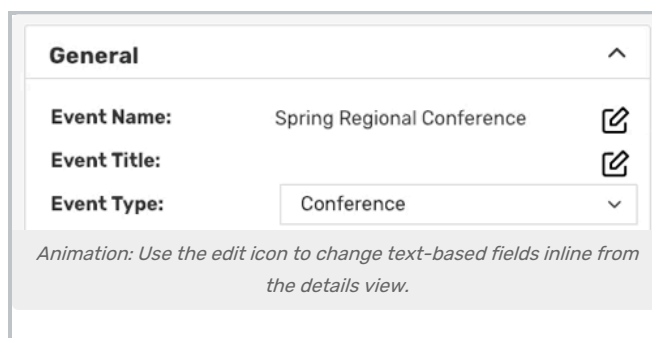
Create Masquerade

Masquerade By: Select a Contact ⌄

Masquerade As: Select Contacts

Expiration Date: Select a date

Save   Cancel

Image: Create Masquerade form.

Other Types of Fields

Text-Based Fields

General   ⌃

Event Name: Spring Regional Conference   ✎

Event Title: ✎

Event Type: Conference   ⌄

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, then use the **Save** button. The **Cancel** button is available to exit editing mode without saving changes.
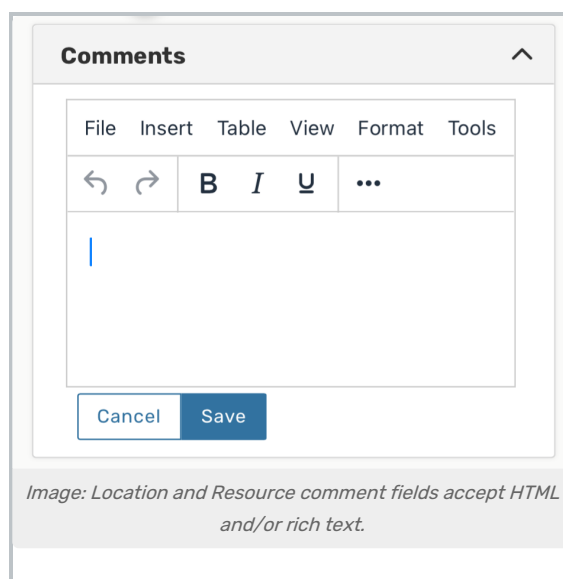
Image: Multi-line text fields can also be changed using the edit icon.

The same edit icon ✎ appears next to multi-line fields, like addresses, to allow editing.

Editing Large Text Fields

Comments:

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>U</u>   •••

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.

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.

Image: Some fields use a dropdown search field to allow inline editing.

Changes will be saved immediately upon closing the menu.

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.
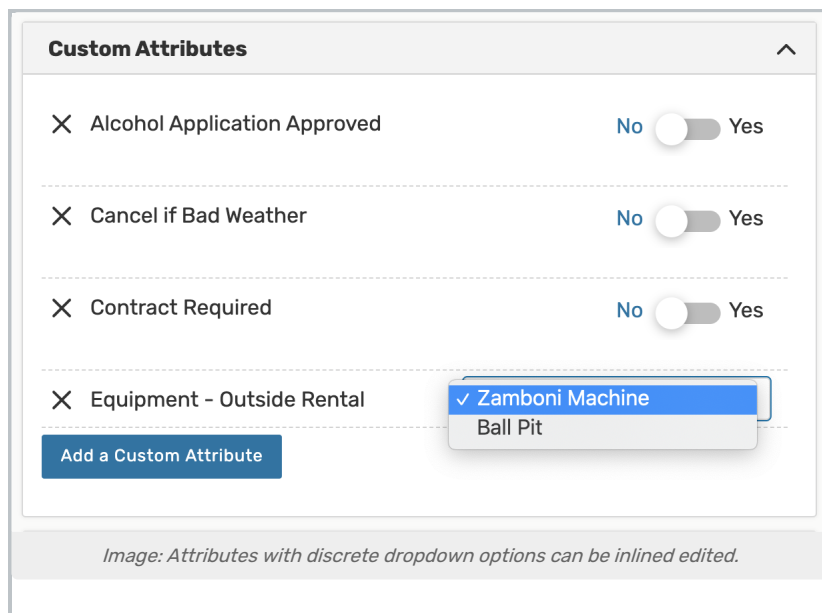
Toggled, Date-Based, Text, and Select Fields

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.
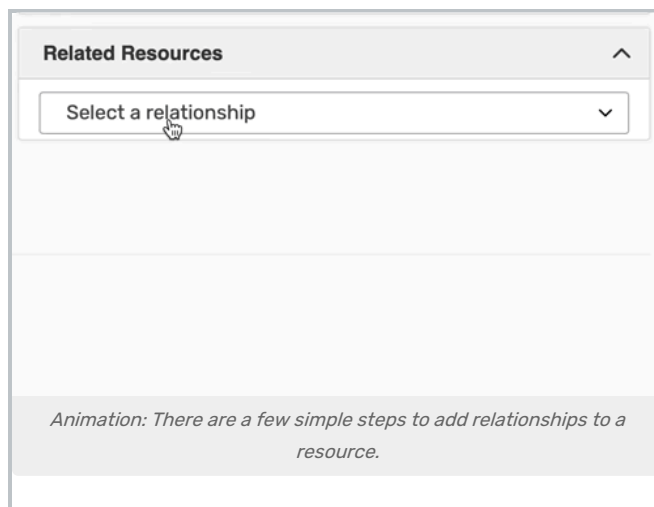
Custom Attribute with Discrete Dropdown Options

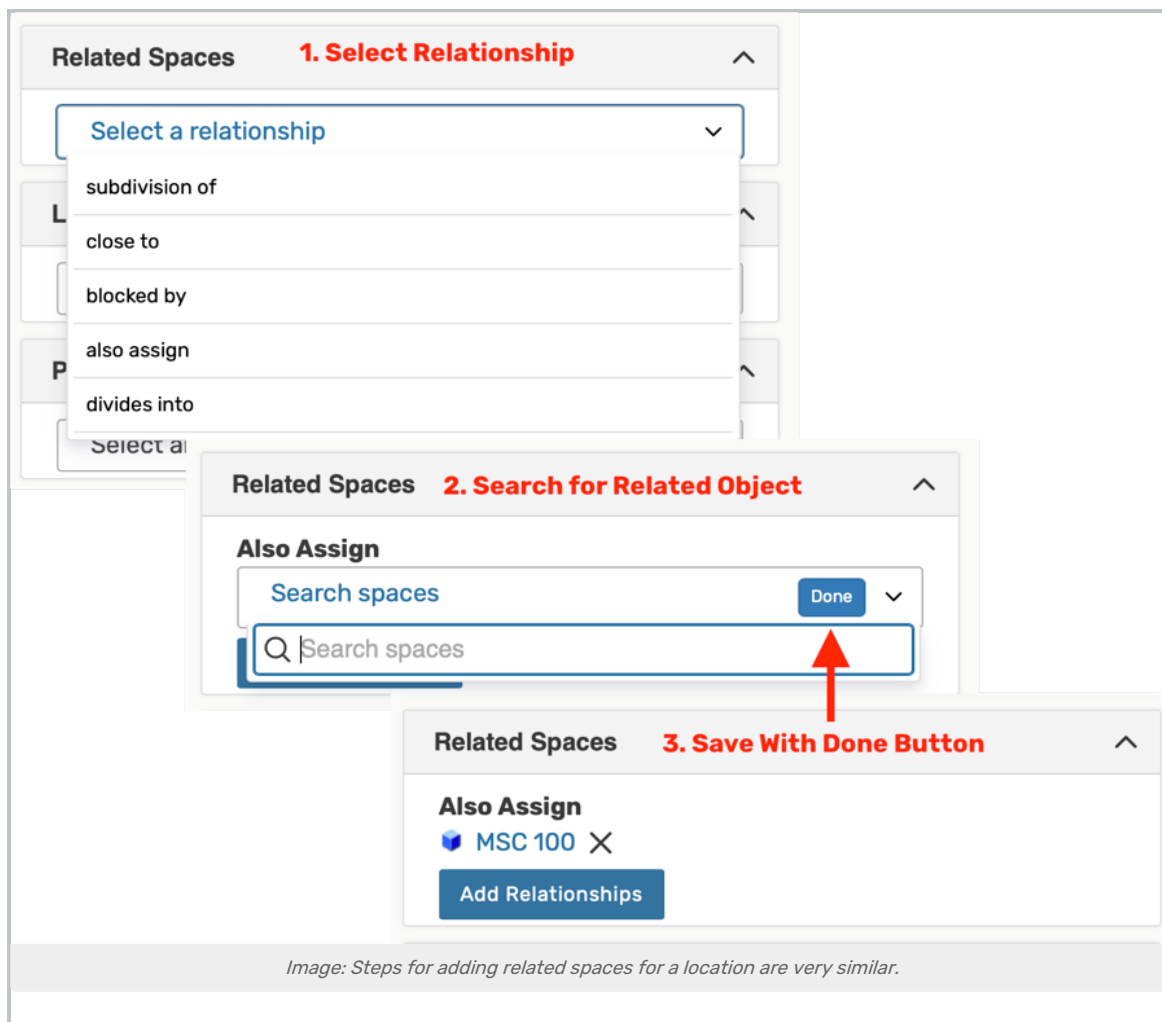Image: Attributes with discrete dropdown options can be inlined edited.

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.

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

Image: Steps for adding related spaces for a location are very similar.

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.

Special Field Types for Contacts

Associated Organizations

Image: You can add and remove organizations associated with a contact using inline editing.

Use the **Add Organization** dropdown to search for and select associated organizations.

Once selected, use the **Choose a Role** dropdown menu to search for and select a contact role for the organization.

To remove an organization, use the "**X**" icon.