Inline Editing Organization Details

Activating Edit Mode

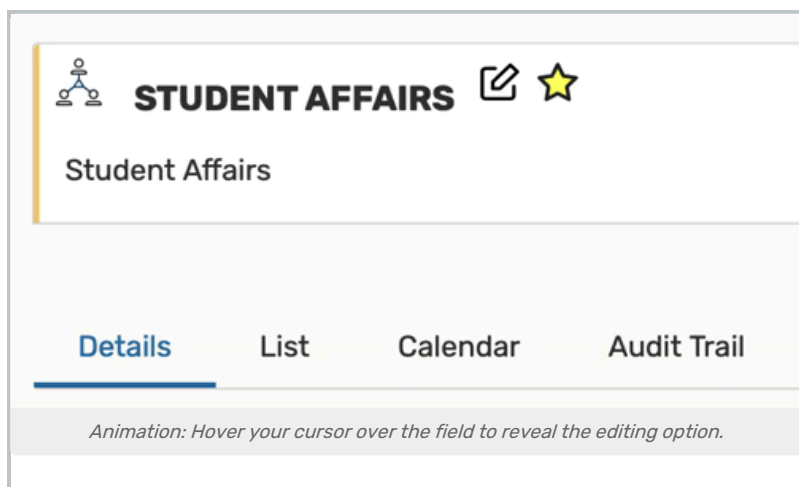*Image: Details views feature a toggle to allow inline editing.*

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 Organizations

- 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 Event Form

- 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
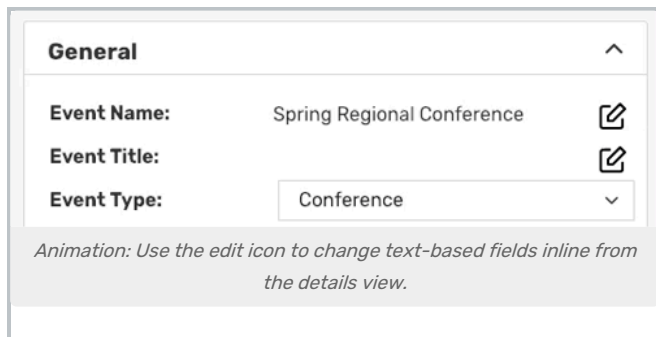
Types of Fields

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, 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. |

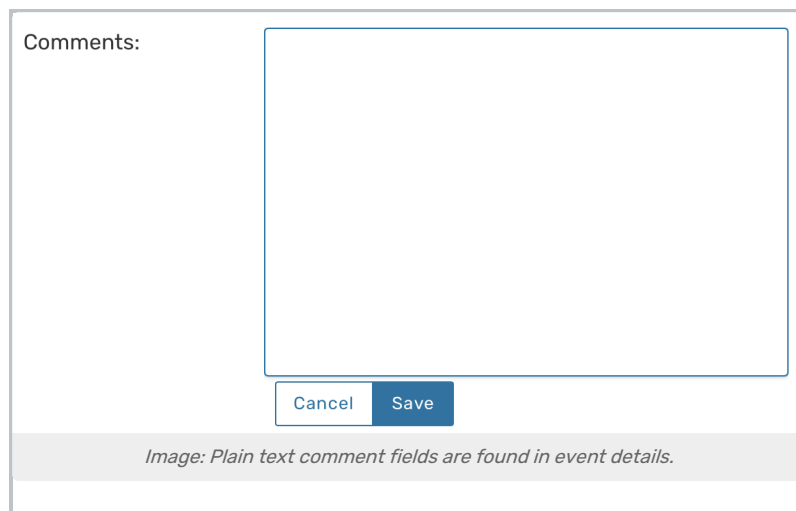Phone
| 503-555-2222 |

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.
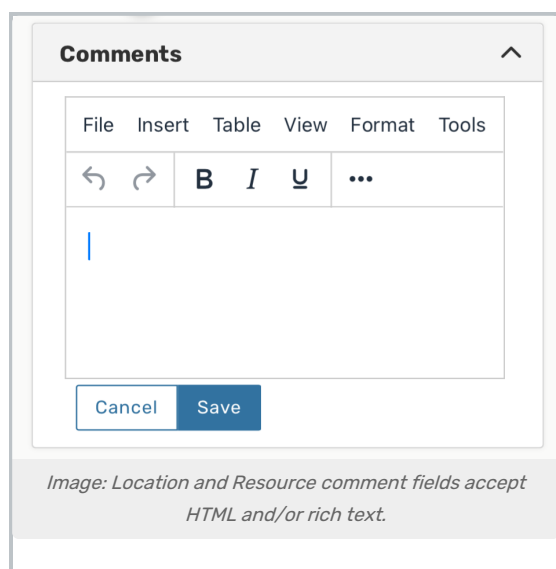
Editing Large Text Fields

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.

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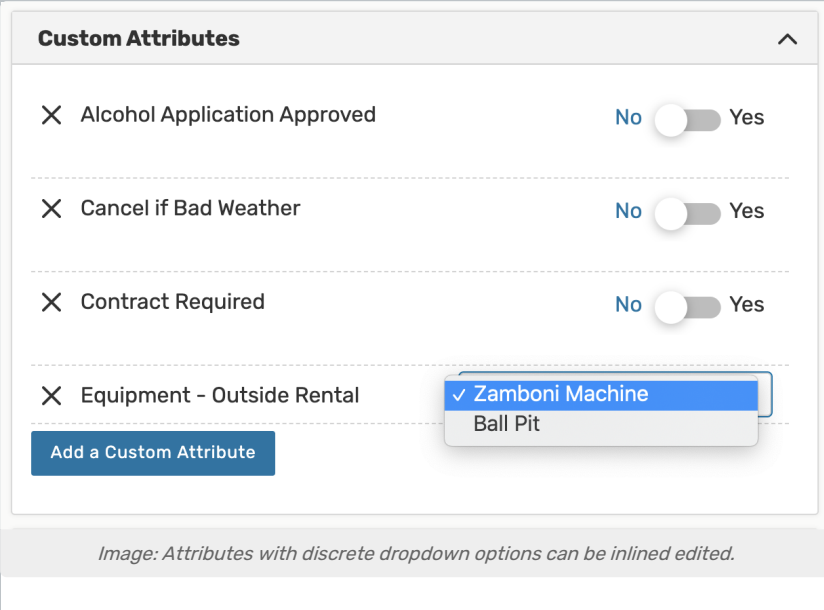
Toggled, Date-Based, Text, and Select Fields

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.
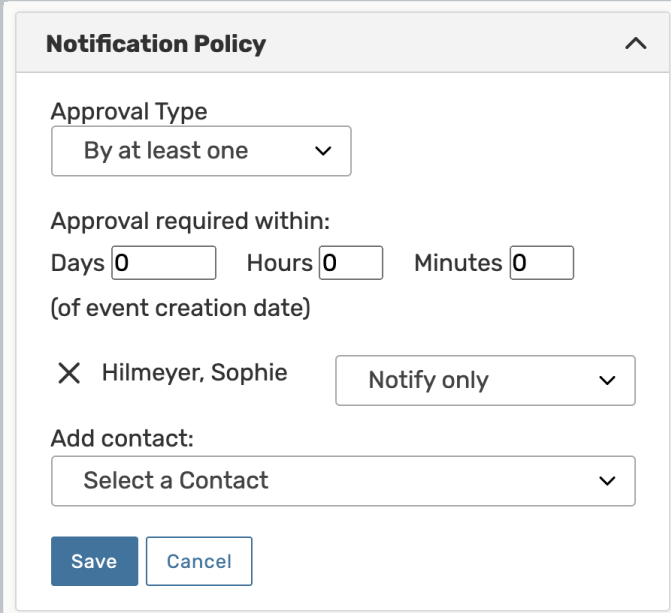
Notification Policy

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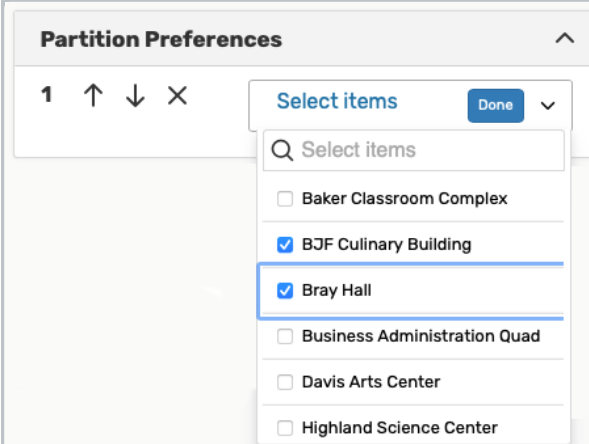
Image: Select details and click "Save" to configure notification policy.

Special Field Types for Organizations

Partition Preferences
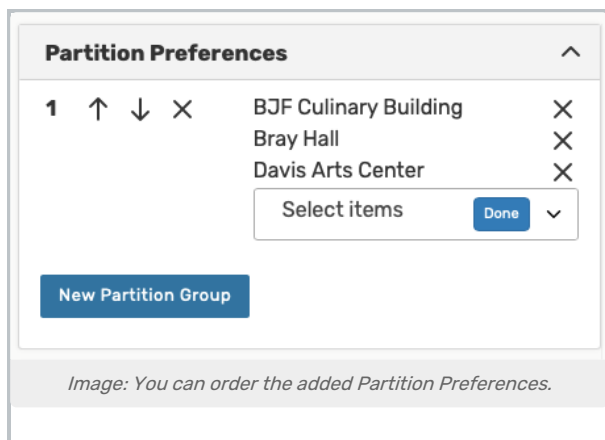

Image: Multiple Partition Preferences can be selected.

Use the **New Partition Group** button to select the new partition you wish to add, then tap or click on **Done** to complete the addition.

Image: You can order the added Partition Preferences.

If you have more than one partition added, you can use the up and down arrows to reorder the partitions in order of preference.

Use the "**X**" icon to remove a partition.

Associated Contacts

Image: Add contacts then choose their roles for the organization.
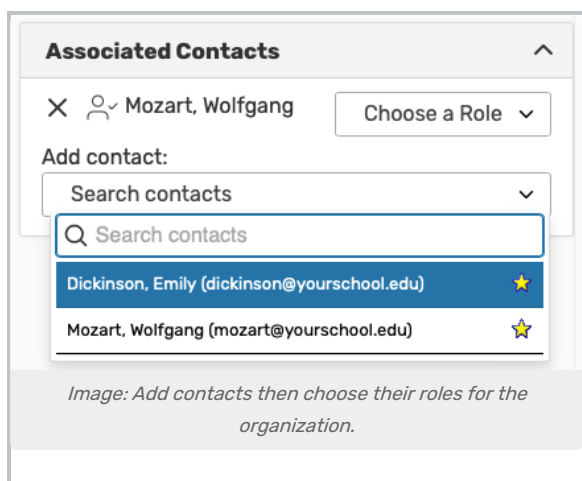
Use the **Add contact** dropdown menu to search for and add contacts you wish to associate with this organization. Then, specify the role the contact has for the organization using the **Choose a Role** dropdown.

The "**X**" icon will remove contacts.