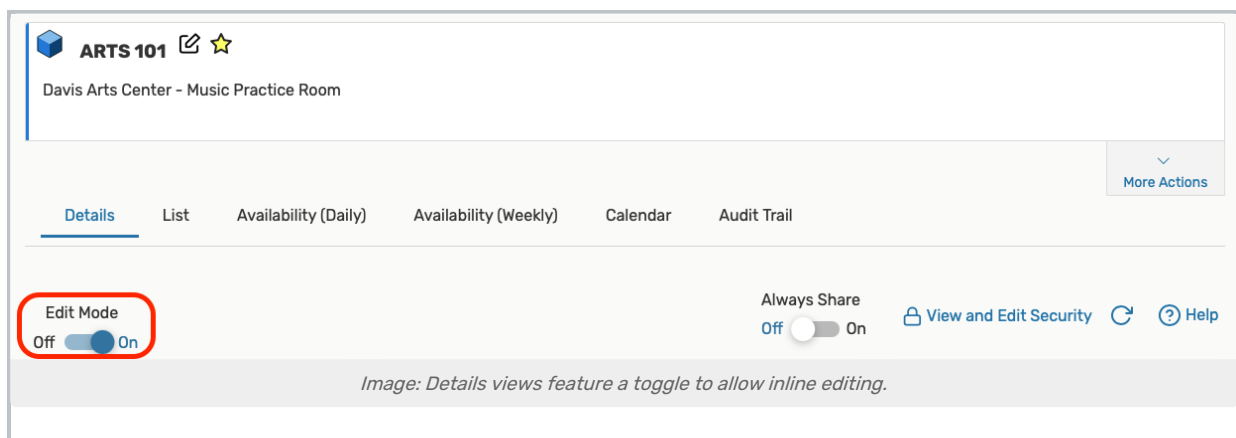


## Inline Editing Organization Details

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## Activating Edit Mode



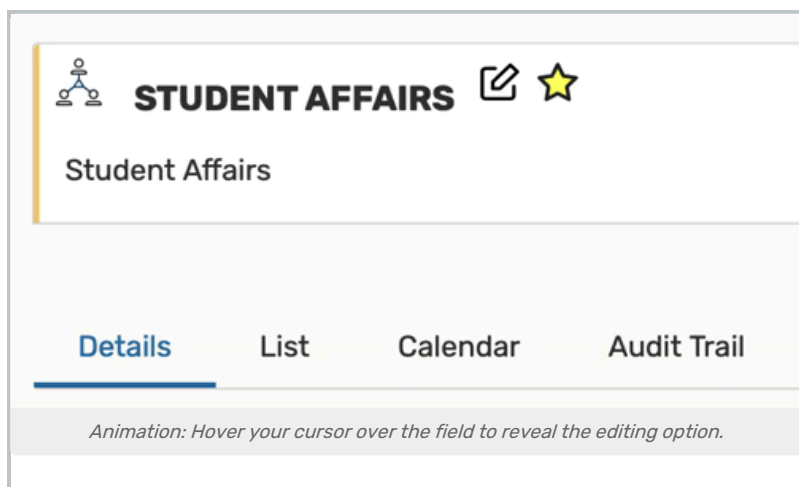
Use the **Edit Mode** toggle at the top of any event, location, resource, or organization details view to turn on or off the ability to edit fields inline. When the toggle is on, edit icons appear next to many fields. Turn the toggle off to protect fields from accidental edits.

## Guidelines For Adding 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

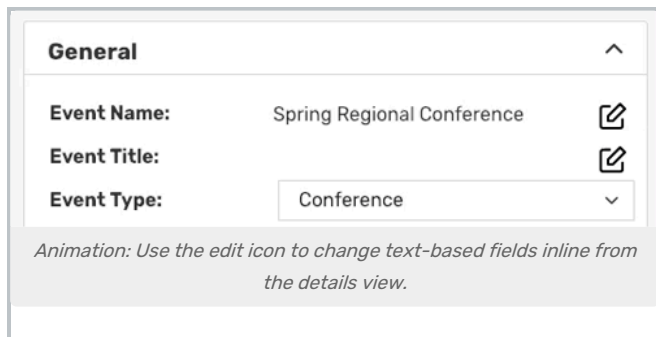
### Formal Names of Objects




The screenshot shows a user interface for editing a formal name. At the top, there is a header bar with a tree icon, the text "STUDENT AFFAIRS", an edit icon (pencil), and a star icon. Below this, the text "Student Affairs" is displayed. Underneath the text, there are four tabs: "Details" (which is selected and underlined), "List", "Calendar", and "Audit Trail". At the bottom of the interface, there is a grey box with the text: "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



The screenshot shows a "General" section with a list of fields. The first field is "Event Name:" with the value "Spring Regional Conference" and an edit icon (pencil). The second field is "Event Title:" with an edit icon (pencil). The third field is "Event Type:" with a dropdown menu showing "Conference". At the bottom of the section, there is a grey box with the text: "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 100

City  
Portland

State / Province  
OR

Zip  
97205

Country  
U.S.

Phone  
503-555-2222

Fax  
503-555-3333

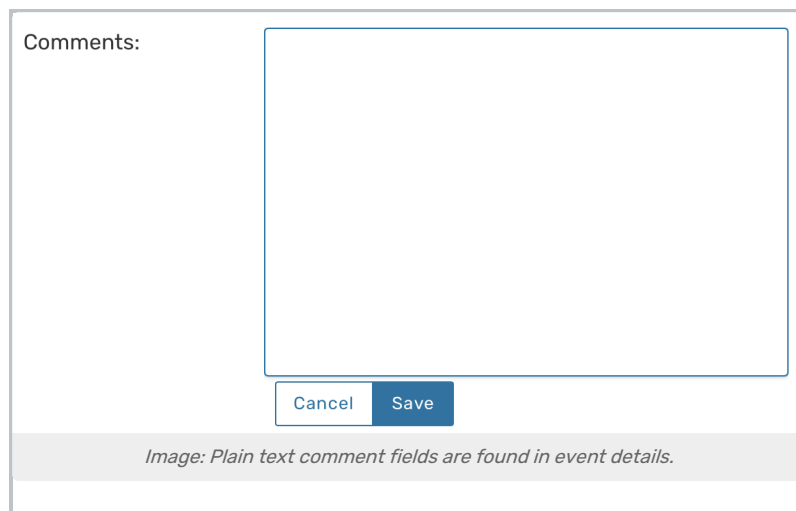
Save

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



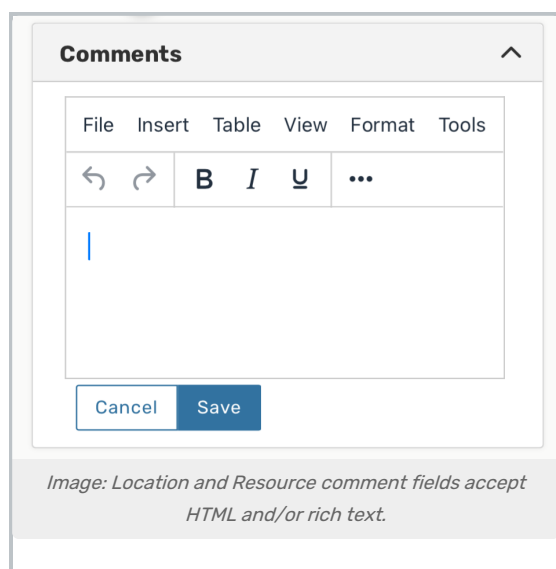
Comments:

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 text input field with a blue cursor.

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.

The screenshot shows a form with two sections: 'Scheduler:' and 'Requestor:'. Both sections have a dropdown menu. The 'Scheduler:' dropdown is currently set to 'Mozart, Wolfgang' with a star icon. The 'Requestor:' dropdown is currently set to 'Dickinson, Emily' with a star icon. Below the 'Requestor:' dropdown is a search bar with the placeholder text 'Search contacts'. Below the search bar are two search results: 'Dickinson, Emily (dickinson@yourschool.edu)' with a star icon, and 'Mozart, Wolfgang (mozart@yourschool.edu)' with a star icon. At the bottom of the form, there is a note: '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.

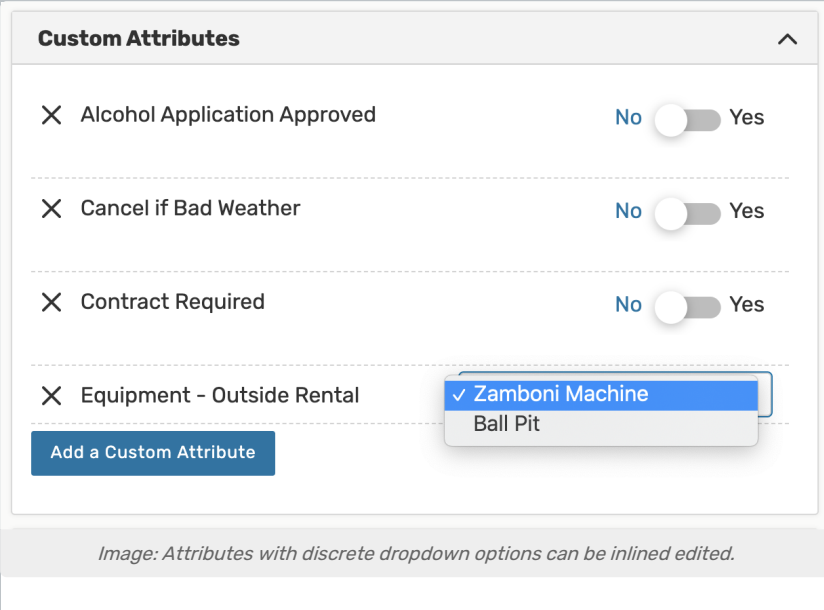
## Toggled, Date-Based, Text, and Select Fields

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

The screenshot shows a form with several custom attributes. Each attribute has a toggle switch for 'Yes/No' and a text field for the value. The attributes are: 'Paid in Full' (toggle set to 'Yes'), 'Payment Received' (toggle set to 'Yes'), 'Rain Location' (dropdown menu set to 'Search spaces'), 'Registration Form' (text field), 'Special Needs' (text field), 'Web Site' (text field), 'Will alcohol be served?' (toggle set to 'Yes'), and 'Will outside food be brought in?' (toggle set to 'Yes'). At the bottom of the form, there is a note: '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



The screenshot shows a 'Custom Attributes' window with a list of attributes. Each attribute has a toggle switch labeled 'No' and 'Yes'. The 'Equipment - Outside Rental' attribute has a dropdown menu open, showing 'Zamboni Machine' (selected) and 'Ball Pit'. A button labeled 'Add a Custom Attribute' is at the bottom left. A caption at the bottom reads: 'Image: Attributes with discrete dropdown options can be inlined edited.'

Attribute	No	Yes
Alcohol Application Approved	<input type="checkbox"/>	<input type="checkbox"/>
Cancel if Bad Weather	<input type="checkbox"/>	<input type="checkbox"/>
Contract Required	<input type="checkbox"/>	<input type="checkbox"/>
Equipment - Outside Rental	<input type="checkbox"/>	<input type="checkbox"/>

Equipment - Outside Rental dropdown options:

- ✓ Zamboni Machine
- Ball Pit

Add a Custom Attribute

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.

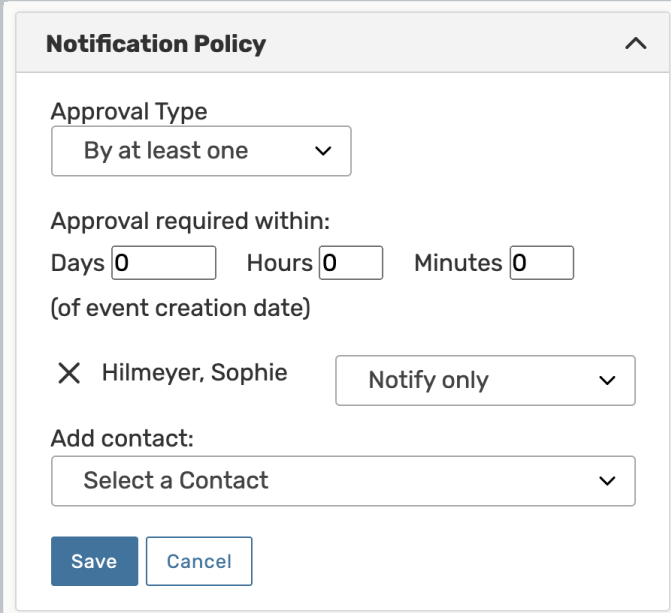
## Notification Policy

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](#).



**Notification Policy**

Approval Type  
By at least one

Approval required within:  
Days 0 Hours 0 Minutes 0  
(of event creation date)

X Hilmeyer, Sophie Notify only

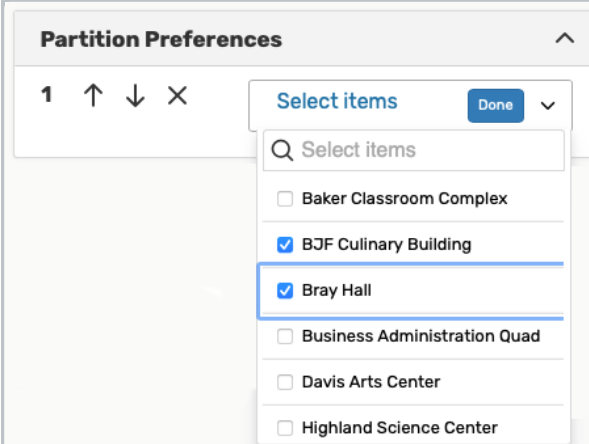
Add contact:  
Select a Contact

Save Cancel

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

## Special Field Types for Organizations

### Partition Preferences



**Partition Preferences**

1 ↑ ↓ X

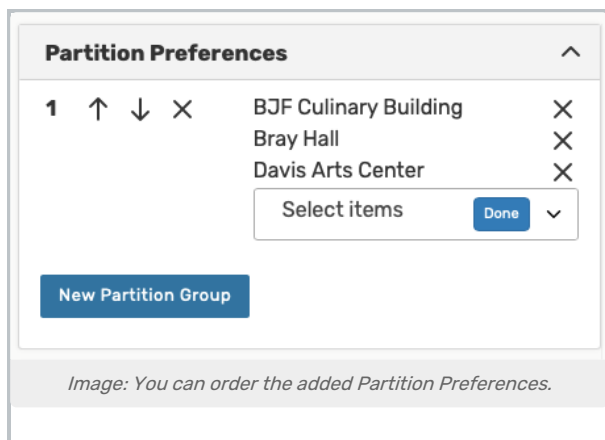
Select items Done

Select items

- ☐ Baker Classroom Complex
- ☒ BJF Culinary Building
- ☒ Bray Hall
- ☐ Business Administration Quad
- ☐ Davis Arts Center
- ☐ Highland Science Center

*Image: Multiple Partition Preferences can be selected.*

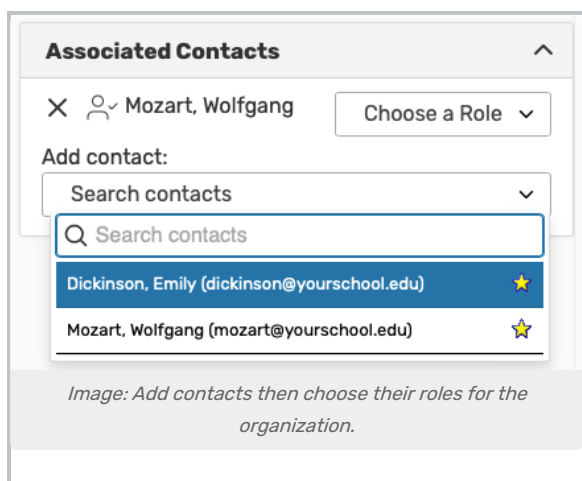
Use the **New Partition Group** button to select the new partition you wish to add, then tap or click on **Done** to complete the addition.



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



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.