

QUICK EDIT IN TABLE VIEWS

Agiloft V6 Release 8.0 (2015_01) enhanced the functionality of **views** in the staff interface. Staff users can use the **Quick Edit** feature to modify most types of fields directly in a table view. Quick Edit views can be applied as views to *related tables*. This allows staff to edit related records directly from within a process record. For example, staff can quickly add notes about attachments using the *related table* view from within a contract.

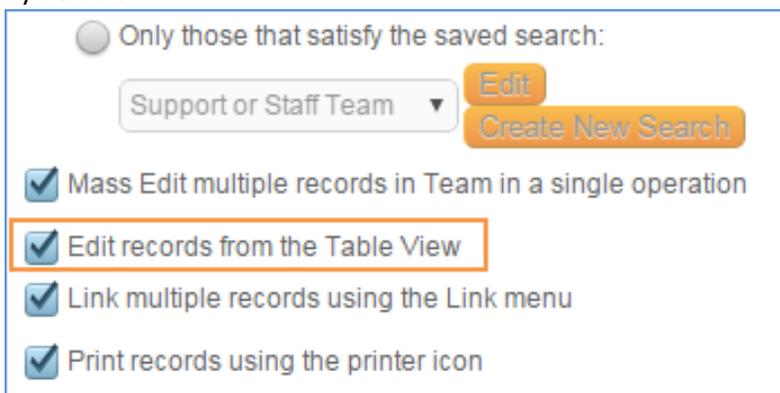
Enabling Quick Edit

To enable **Quick Edit**, you must define two group permissions, configure each field, and then create the **view**.

Required Group Permissions

There are two permission settings to enable **Quick Edit**. To begin, navigate to **Setup > Access > Manage Groups** and **Edit** the relevant group. In the Groups wizard:

1. For **each table** where staff will use Quick Edit, go to the **Permissions** tab and select the checkbox to allow the group to **edit records from the table view**. Only the admin group has this permission by default.



2. To allow groups to create their own Quick Edit views: Navigate to the **Menu-Specific** tab of the Groups wizard and select the option **Allow members of this group to add editable fields to views they create or edit**.

Note: This permission will not allow groups to create Quick Edit views unless the permission above is enabled.

The permission to **create** Quick Edit views is not required for group members to simply use a quick edit view.

Allow creating/editing/deleting Views?

Don't allow
 Allow for their own views
 Allow for all views

Allow publishing Views

Allow members of this group to add editable fields to views they create or edit.

Required Field Setup

The option to allow a field to be quick edited is off by default. You must enable each field individually.

1. Go to **Setup [Table] > Fields**. Click the **Edit** icon next to the field to open the wizard.
2. On the **Permissions** tab of the field wizard, scroll down to find the option **Allow this field to be edited directly from a table view** and select **Yes**.

Allow this field to be edited directly from a table view

Yes
 No

Creating Quick Edit Views

Once the proper permissions have been applied, you can create **Quick Edit** views.

1. Navigate to the table view and select **Views > New** from the action bar.
2. On the **Fields** tab of the View wizard, check the **Editable Field** column next to the appropriate fields.

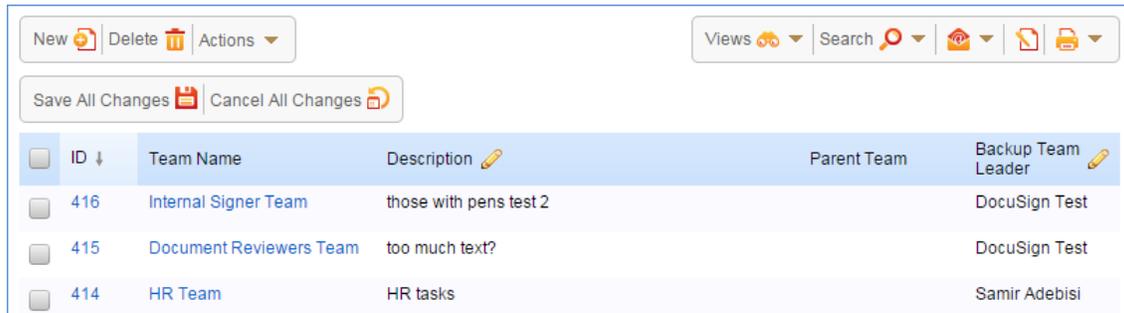
Field Name	Display	Column Width	Edit Link	View Link	Editable Field	Right Align
Backup Team Leader	<input checked="" type="checkbox"/>	Automatic ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Demo Data	<input type="checkbox"/>	Automatic ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input checked="" type="checkbox"/>	Automatic ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit custom fields test	<input type="checkbox"/>	Automatic ▾	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ID	<input checked="" type="checkbox"/>	Automatic ▾	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Note: If you cannot select the *editable field* option, check that the field is *editable*. See [REQUIRED FIELD SETUP](#)

3. Finish modifying the view and name it. When you're done, click **Finish** to save the view.

Using Quick Edit

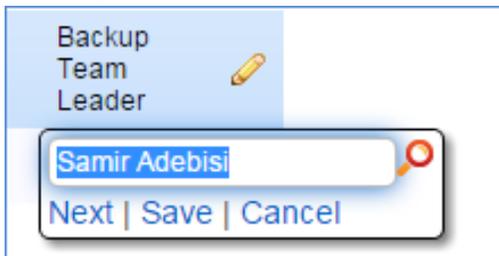
In a quick edit view, a pencil icon appears in the column heading above each editable field. Two buttons, **Save All Changes** and **Cancel All Changes**, appear above the table.



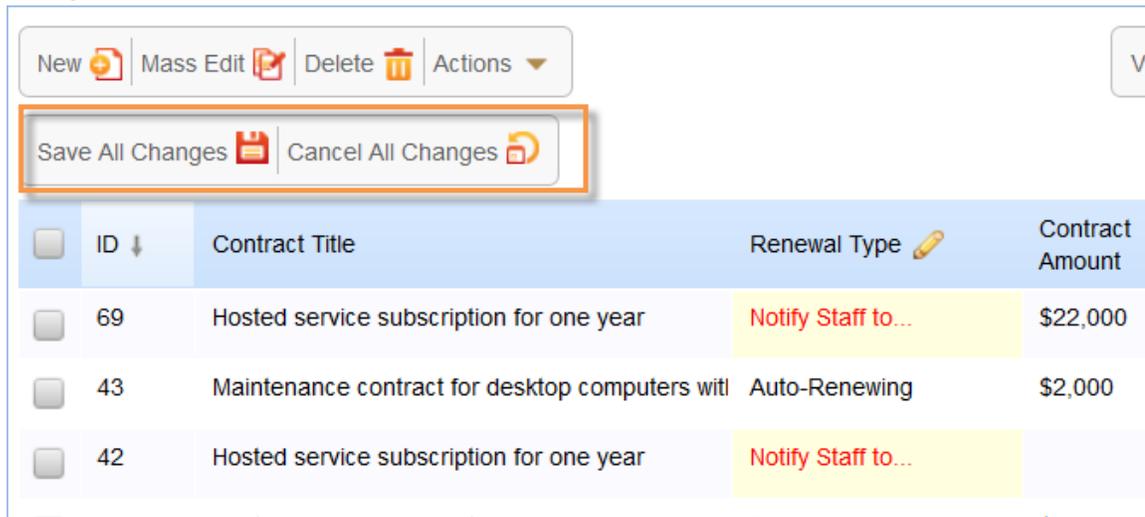
ID	Team Name	Description	Parent Team	Backup Team Leader
416	Internal Signer Team	those with pens test 2		DocuSign Test
415	Document Reviewers Team	too much text?		DocuSign Test
414	HR Team	HR tasks		Samir Adebisi

Figure 1. The pencil icon indicates the Description and Backup Team Leader fields are editable.

1. Click in the field to begin editing. The input aid depends on the type of field: for example, a *choice list* uses a drop-down selector, while editing an *HTML* field opens the HTML editor. Once finished, choose **Next** to move to the next editable field, **Save**, or **Cancel**.



- After editing several fields using **Next**, use the **Save All Changes** button to save. Click **Cancel All Changes** to roll back all field edits since the last save.



Note: The **Save All Changes** and **Cancel All Changes** buttons are part of the **action bar**. You must include an action bar when using **Quick Edit**.

Limitations

Field Type Limitations

The following types of fields cannot be edited in a **Quick Edit** table view:

- Password
- Calculated Result
- Calculation on multiple linked records
- Compound
- File (File with Versioning)
- Image (Image with Versioning)
- Action buttons
- URL

Additional Limitations

Hierarchical dependence. Hierarchically dependent fields can be edited in Quick Edit views. However, the parent field must also be included in the view. The reason for this is that the system must be able to read the data from the parent field in order to determine the allowed values in the dependent field.

For example, suppose two *choice fields*, **Type** and **Subtype**, where **Subtype** is hierarchically dependent on **Type**. If you want to use the **Subtype** field in a quick edit view, **Type** must also be added to the view.

Conditional requirement. Conditionally required fields can be added to quick edit views, and the requirement condition will be properly applied regardless of whether the parent field is included in the view. If a conditionally required field meets the requirement condition but does not appear in the view, it will not be required. This parallels the behavior of conditionally required fields in a record: if the user cannot see a field, it will not be required.

Visibility dependence. Visibility dependent fields appear in a view regardless of the visibility condition. However, if the condition is not met and the field should not appear in the record, users can not edit the field. A warning icon is displayed if users attempt to edit a field which does not meet its visibility requirement.

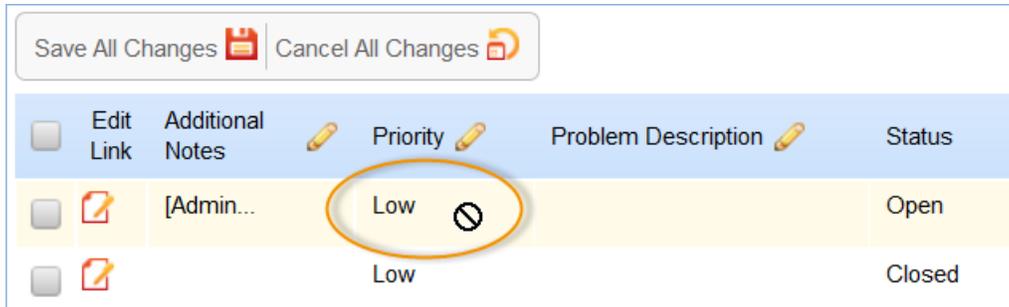


Figure 2. A warning icon appears for fields that are conditionally visible or conditionally editable.

Conditional editing. If a field has been set up to allow editing based on the values in another field, and the condition is not met, users will see a warning icon as above.

Validation actions. Validation actions that present a pop-up message to the user are not applied during **quick edit** at this time.

Troubleshooting

The Save All Changes / Cancel All Changes buttons do not appear.

The Save / Cancel All Changes buttons are part of the table's **action bar**. You must include an action bar for the buttons to appear. If you do not want users to use any action bar items, you can include an empty action bar.

When I use Quick Edit, sometimes the changes are not saved.

Validation actions are not presented to users when quick editing records from a table view. Depending on how the actions were set up, this can prevent record changes if the data entered does not meet a validation requirement.