

## Bulk Editing Events



### Security Note

You need Edit object security permission for an event to be able to edit it. In addition, if your user does not have permission to view Contacts, the default scheduler for a location or resource may not be set. If you're unable to edit an event you think should be available to you, contact your 25Live administrator.

25Live allows you to [edit events individually](#) or bulk edit multiple events at the same time. When using the bulk editing functionality, you need to have access to [saved searches](#) as well as "Can access inline editing" permission. When bulk editing events, you can perform several actions (listed below under Step 4).

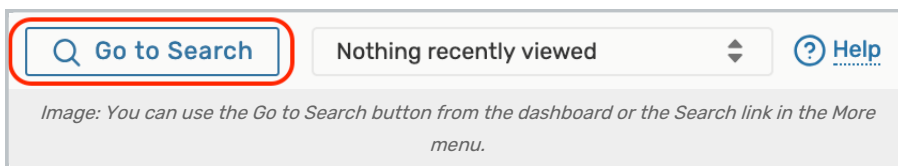


### Security Note

In addition to using a saved search for bulk editing, you may need your 25Live Administrator to turn on the following permission in [Series25 Group Administration](#): Administrative: 1.0 *Bulk Editing on Location Assignments*.

## How to Bulk Edit Events

### 1. Go to the Search Section



Navigate to the Search section using the **Go to Search** button in the [top navigation bar](#). There is also a Search link in the **More** menu in the top navigation.

### 2. Choose a Saved Search or Perform a Search

Select Object: Events ▾

Saved Searches (optional) ▾

Quick Search ☐ Advanced

Search Events

More Options ▾

Search

*Image: You may choose a saved search created by a user rather than any Pre-Defined searches for bulk editing.*

Be sure the **Events** search type is selected, and perform a search or choose the search you want to use from the **Saved Searches** dropdown menu. If selecting a search, you must select a saved search that was created by you or another user, such as those in the **All of Your Event Searches** section of the list.



#### Reminder: Choose a User Saved Search

If selecting a search, you may not choose from the **Pre-Defined Groups** list of searches (such as Your Starred Events) when bulk editing events.

If you don't currently have a saved search available that includes all the events you want to bulk edit, you may perform a new search or create and save a new saved search, then come back to the search screen to begin the steps to bulk edit events.

Use the **Search** button to run the search.

### 3. Choose From the Event List After Selecting the Bulk Edit Option

List Calendar

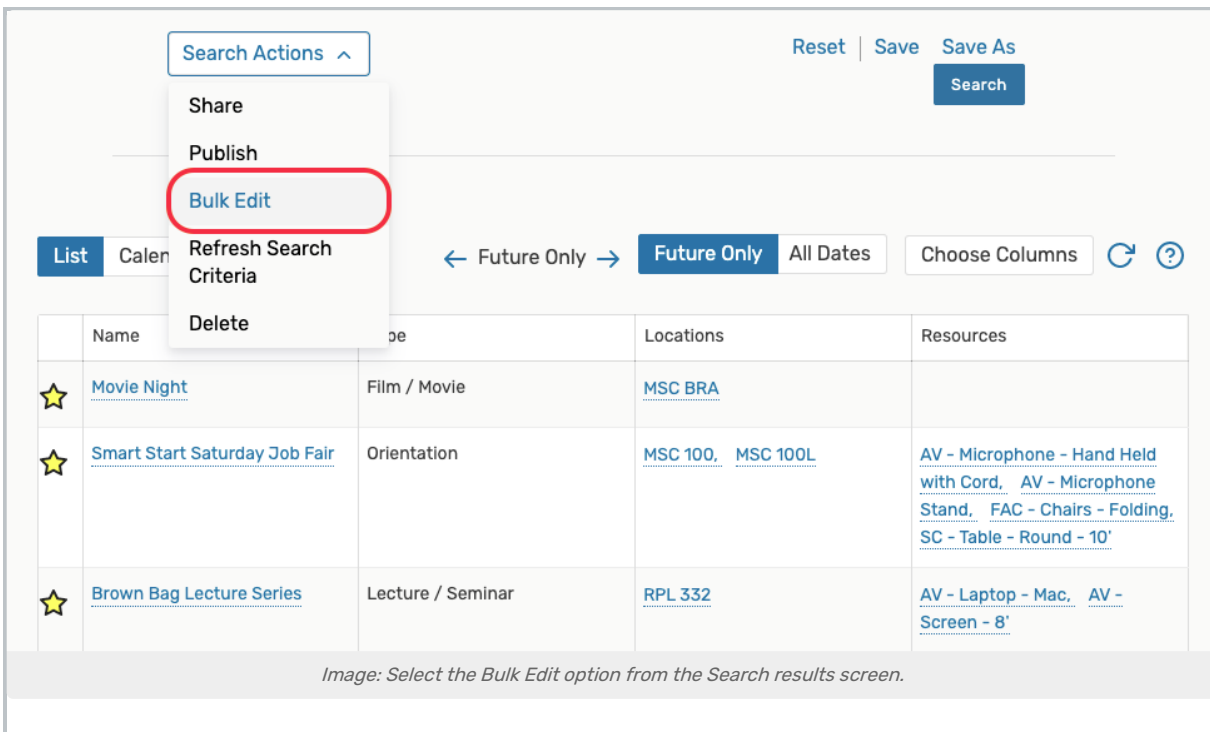
← Recent and Future →

Recent & Future Future All Dates

Select Columns Bulk Edit

81 Matching Events

Name	Title	Reference	Organizations	Type	Categories	Your Role	Start Date	Start Time	Creation Date	State	Location	Resources	Schedule
<i>Image: You may choose to use the Bulk Edit button from the search results of a new search.</i>													



The screenshot shows the 'Search Actions' dropdown menu open, with 'Bulk Edit' highlighted by a red circle. The menu options are: Share, Publish, Bulk Edit, Refresh Search Criteria, and Delete. The background shows a search results table with columns: Name, Type, Locations, and Resources. The table contains three rows of event data.

	Name	Type	Locations	Resources
★	<a href="#">Movie Night</a>	Film / Movie	<a href="#">MSC BRA</a>	
★	<a href="#">Smart Start Saturday Job Fair</a>	Orientation	<a href="#">MSC 100</a> , <a href="#">MSC 100L</a>	<a href="#">AV - Microphone - Hand Held with Cord</a> , <a href="#">AV - Microphone Stand</a> , <a href="#">FAC - Chairs - Folding</a> , <a href="#">SC - Table - Round - 10'</a>
★	<a href="#">Brown Bag Lecture Series</a>	Lecture / Seminar	<a href="#">RPL 332</a>	<a href="#">AV - Laptop - Mac</a> , <a href="#">AV - Screen - 8'</a>

*Image: Select the Bulk Edit option from the Search results screen.*



#### Note: Event Selection is Limited

Selection for bulk editing is currently limited to 1,000 events or less to optimize performance.

On the search screen, use the **Search Actions** dropdown to select the **Bulk Edit** option. Or, if searching from a newly performed search, use the **Bulk Edit** button above the search results table.

Event List

Cancel

Go to Actions

?

Help

<input checked="" type="checkbox"/>	Name	–	Title
<input type="checkbox"/>	Conference Breakouts		Conference Break
<input type="checkbox"/>	Ceremony Setup		Ceremony Setup
<input type="checkbox"/>	Ceremony Setup		Ceremony Setup
<input type="checkbox"/>	Graduation Ceremony		Graduation Cerem
<input type="checkbox"/>	Welcome Address		Welcome Address Andrea Martin
<input type="checkbox"/>	Graduation Ceremony		Graduation Cerem
<input type="checkbox"/>	CollegeNET Conference		CollegeNET Conference

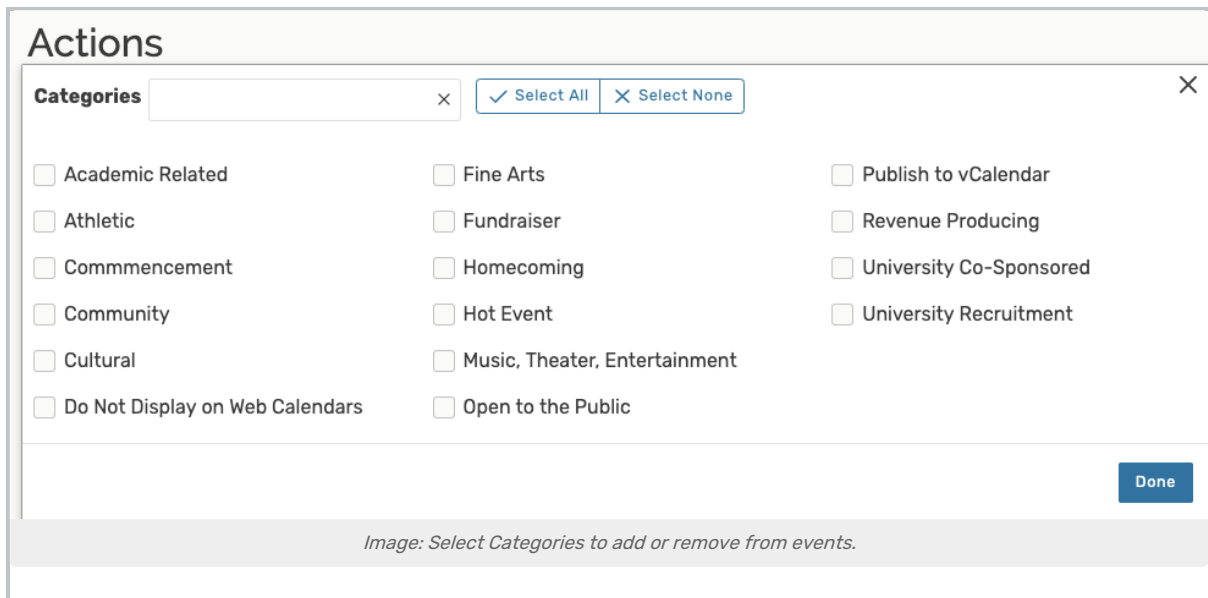
Animation: Choosing events from the list and running through the bulk editing options.

The **Event List** screen allows you to check which events you want to bulk edit. After selecting, use the **Go to Actions** button to continue.

4. Select and Run Available Actions

Select from the available actions in the dropdown menu. Each action has its own set of criteria to enter and notes about the action results.

Add/Remove Event Categories



The screenshot shows a modal window titled "Actions". At the top, there is a "Categories" label followed by a search input field with a clear 'x' button. To the right of the input field are two buttons: "Select All" (with a checkmark icon) and "Select None" (with an 'x' icon). Below this header, there is a grid of 15 categories, each with an unchecked checkbox. The categories are: Academic Related, Athletic, Commencement, Community, Cultural, Do Not Display on Web Calendars, Fine Arts, Fundraiser, Homecoming, Hot Event, Music, Theater, Entertainment, Open to the Public, Publish to vCalendar, Revenue Producing, University Co-Sponsored, and University Recruitment. A blue "Done" button is located in the bottom right corner of the modal. At the very bottom of the modal, there is a grey bar with the text: "Image: Select Categories to add or remove from events."

#### Adding a Category: Criteria to Enter

- To add **Categories**, set the toggle to **Add**.
- Use the **Select Categories** button and check each category that you wish to add. There are options available to **Select All** or **Select None** to reset your checked choices. Then tap **Done**.
- Use the **Add Categories** button.

#### Action Notes

- If a category is already on an event, it will not be added twice.

#### Removing a Category: Criteria to Enter

- To remove **Categories**, set the toggle to Remove.
- Use the **Select Categories** button and check each category that you wish to remove. There are options available to **Select All** or **Select None** to reset your checked choices. Then tap **Done**.
- Use the **Remove Categories** button.

#### Action Notes

- If one or more categories are not already associated with one of the events, no change will be made when running the action.

#### Add/Edit Event Custom Attribute

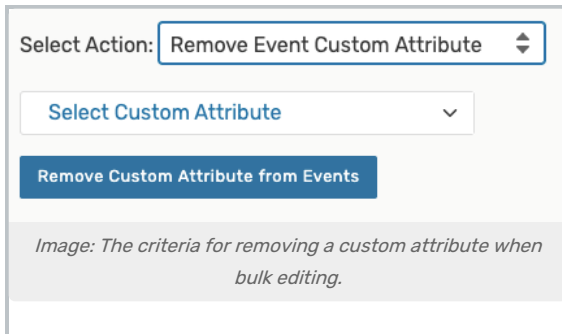
##### Criteria to Enter

- Choose one custom attribute from the **Select Custom Attribute** dropdown menu. Set the value of the attribute, if required.
- Use the **Update Custom Attributes** button.

#### Action Notes

- Only one custom attribute can be edited at a time.
- If the custom attribute is already on any event, the value will be updated.
- If the custom attribute is not on any event, it will be added.
- Custom attributes with discrete values are available to bulk edit multiple options.

### Remove Event Custom Attribute



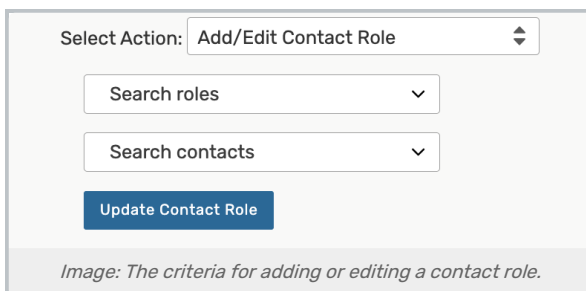
#### Criteria to Enter

- Choose one custom attribute from the **Select Custom Attribute** dropdown menu.
- Use the **Remove Custom Attributes** button.

#### Action Notes

- Only one custom attribute can be removed at a time.
- If the chosen custom attribute is not on one of the events, no change will be made.

### Add/Edit Contact Role



#### Criteria to Enter

- Choose or search for a role from the **Search roles** dropdown menu.
- Choose or search for a contact using the **Search contacts** dropdown menu.
- Use the **Update Contact Role** button.

#### Action Notes

- Only one contact role can be added or removed at a time.
- The contact role does not directly affect assignment policy or notification policy in the application but may impact those policies based on your institution's business practices.

### Remove Contact Role

#### Criteria to Enter

- Choose or search for a role using the **Search roles** dropdown menu.
- Use the **Remove Contact Role** button.

#### Action Notes

- Only one contact role can be removed at a time.
- If the chosen contact role is not on one of the events, no change will be made.

### Edit Event Name and Edit Event Title

#### Criteria to Enter

- You can find and replace strings of text in the titles of Event Names and Event Titles with simple keywords or using [regular expressions](#). Use the checkboxes to apply your terms to:
  - *All Instances* - If this box is checked, all of the matches will be replaced. If it is unchecked, only the first match will be replaced.
  - *Case Sensitive* - If this box is checked, it will only match on strings that are an exact match including case. If it is unchecked, it will not consider case when looking for a match.

Regular Expression Find & Replace

Find

☐ All Instances

☐ Case Sensitive

Replace:

Original Name	New Name	Too Long?
Smart Start Saturday Job Fair	Smart Start Saturday Job Expo	No

*Image: Viewing a preview of a simple keyword find and replace.*

- (Optional) **Preview** how your edit will apply.
- When you're sure your edit will apply as intended, use the **Update Event Names** or **Update Event Titles** button.

#### Action Notes

- It is helpful to search online for guides and examples for using regular expression syntax.

#### Change Event Ownership

Actions

Select Action:

Select Event Owner

Contact ☒ Role

*Image: Event ownership can be matched to an event contact role.*

#### Criteria to Enter

- Choose by toggle whether you'd like to search for a **Contact** or select from an event **Role**
- Search or select
- Use the **Update Event Owner** button to save

#### Action Notes

- Be careful changing this important property for multiple events
- This action is useful after importing events where the event owner role defaulted to the user that imported the events



## Regular Expression Examples

- 1.) A keyword find and replace is the most simple edit to make.
  - **Event Name/Title:** Apple Festival Orientation
    - **Find:** Apple
    - **Replace:** Banana
  - **Result:** Banana Festival Orientation
- 2.) For a more complicated regular expression edit, you can add a prefix to all values.
  - **Event Name/Title:** Apple Festival Orientation
    - **Find:** (^)
    - **Replace:** Autumn
  - **Result:** Autumn Apple Festival Orientation
- 3.) Similarly, you can add a suffix to all name/title values.
  - **Original Event Name/Title:** Apple Festival Orientation
    - **Find:** (\$)
    - **Replace:** Brunch
  - **Result:** Apple Festival Orientation Brunch
- 4.) You can replace the whole of the name or title content.
  - **Original Event Name/Title:** Apple Festival Orientation
    - **Find:** .\*
    - **Replace:** Brunch
  - **Result:** Brunch
- 5.) Use this to replace a blank title.
  - **Original Event Title:** (blank)
    - **Find:** ^\s\*\$
    - **Replace:** Brunch Reception
  - **Title Result:** Brunch Reception

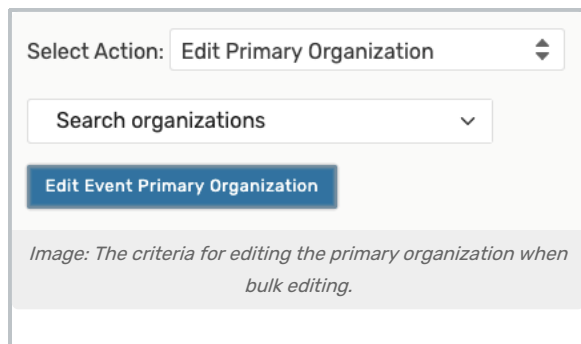


### Note

The result of your regular expression name edit cannot be blank

If your regular expression syntax edit would result in a blank name value, the edit will not be applied. Titles are not affected.

## Edit Primary Organization



### Warning: Bulk Edits Can Affect Pricing

Some bulk edits, such as editing the Organization, can affect event pricing. If pricing is affected, the event will have a note displayed on its pricing view alerting that a pricing refresh/update is needed.

Best practice is to go to the affected events in your chosen bulk edit search to refresh pricing right away after making the edits.

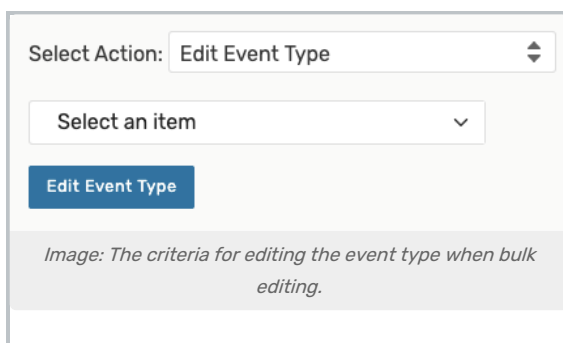
### Criteria to Enter

- Search for and select the new primary organization from the **Search organizations** dropdown.
- Tap the **Update Primary Organization** button to save.

### Action Notes

- If any events in the bulk edit do not have a Primary Organization, the chosen organization will be added. Otherwise, the Primary Organization will be replaced.

## Edit Event Type



### Criteria to Enter

- Select an event type from the **Select from Types** dropdown.
- Use the **UpdateEvent Type** button to save.

### Action Notes

- Just as when [inline editing](#) the Event Type, changes made will not affect the current folder or currently

applied custom attributes.

### Edit Event State

#### Actions

Select Action: Edit Event State

Tentative

Set Event State

Return to List Return to Search

*Image: Editing the event state for multiple events will set them all to be the same.*


### Criteria to Enter

- Select from the allowed **Event State** options in the dropdown.
- Use the **Update Event State** button to save your selection.

### Action Notes

- Only Event States that your user has permission to view/use will display in the dropdown menu.

#### Draft Conflicts

 **The event state was not changed. One or more locations and/or resources attached to this draft have conflicts with existing events.**

**Conflicts on:**

Tue Jul 30	<ul style="list-style-type: none"><li>• ARTS 203 <a href="#">Testing Draft Bulk Edit</a> 10:00 am - 11:00 am</li><li>• ATRIUM <a href="#">Testing Draft Bulk Edit</a> 10:00 am - 11:00 am</li></ul>
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Please edit this draft via the Event Form to address the conflicts and update the event state.

Close

*Image: Location conflicts need to be resolved before saving.*

- You may encounter location conflicts that need to be resolved before continuing.

### Unassign Locations

#### Criteria to Enter

- Choose the beginning and end of the date range (including times) in which you want to remove location assignments.
- Use the **Select Locations** button to choose specific locations you want to remove.  
***OR*** You can choose no locations to allow the action to *remove all locations* from the events you're editing.
- (Optional) Deselect the **Generate Preference** box to set if you do not want the location to be set as a preference upon unassignment.
- Use the **Unassign Locations** button to complete the bulk edit.

#### Action Notes

- This feature is only available for administrators (in the (-1) security group), but it will soon be optionally expanded to other security groups.

#### Add/Edit Event Requirement

Select Action: Add/Edit Event Requirement

Select from Requirements

Edit Comments

Yes No

X

 Check here if alcohol will be served at the event.  
Comment

X

 Send to Alumni Calendar  
Comment

Update Event Requirement

Return to List

Return to Search

Image: Comments are available to also add to the event with requirements.

#### Criteria to Enter

- Use the **Select from Requirements** dropdown menu to choose an available requirement.
  - Selecting again will add additional requirements.
  - Use the **X** next to any requirement to remove it from this display before saving.
- Toggling **Edit Comments** to **Yes** if you need to add text.
- Tap or click on the **Update Event Requirement** button to save your selection.

#### Action Notes

- If requirement is associated with an invoice, then it is not removed from the invoice
- Removing a requirement from an event does not remove its corresponding task from the Task List
- If user has insufficient permission to edit one of the selected events and sees a message, "No object-level access

to edit event," View Only event does not get updated

### Remove Event Requirement

Select Action: Remove Event Requirement

Select from Requirements

X

 Check here if alcohol will be served at the event.

X

 Send to Athletic Calendar

Remove Event Requirement

Return to List

Return to Search

*Image: Selecting again will add to the list of requirements to remove.*

### Criteria to Enter

- Use the **Select from Requirements** dropdown menu to choose an available requirement.
  - Selecting again will add to the list of requirements to remove.
- The **X** link next to any requirement will remove it from this display before saving.
- Tap or click on the **Remove Event Requirement** button to save your selection.

### Delete Events



#### Warning: Be Sure You're Making an Informed, Purposeful Change

Deleting an event is permanent and cannot be reversed. Deleting events will also remove all references to them.

- Toggle **Delete Mode** from **Off** to **On**.
- Be sure to note the warning.
- Use the **Delete** button.

### Change Event Folder

This option is only available to users in the System Administrator (-1) security group.

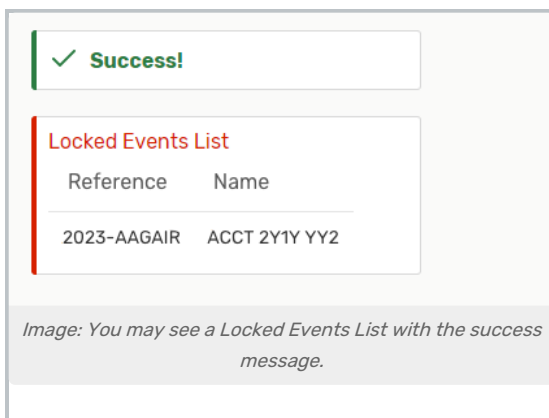
- From the **Select From Folders** dropdown, choose which folder you would like to move your selected events to.
- Tap **Update Event Folder** to save.

### Inherit Events

This option is only available in instance that do not use LYNX. Currently, this feature is only available to users in the System Administrator (-1) security group.

- Review the list of events that you want to inherit folder categories and constraints to.
- Tap the **Inherit date to event** button to save.

## 5. After Success, Return to Event List or Search



After completing each action, a **Success** message will be displayed. You may also see a **Locked Events List** of events that could not be edited due to a lock or insufficient permissions. You can try to [edit those events individually](#) or contact your 25Live Administrator to discuss the locks or your current security permissions.