Bulk Editing Multiple 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 a number of actions:

- Add/Remove Event Categories
- Add/Edit Event Custom Attribute
- Remove Event Custom Attribute
- Add/Edit Contact Role
- Remove Contact Role
- Edit Event Name
- Edit Event Title
- Edit Event Primary Organization
- Edit Event Type
- Edit Event State
- Unassign Locations
- Add/Edit Event Requirement
- Remove Event Requirement
- Delete Events
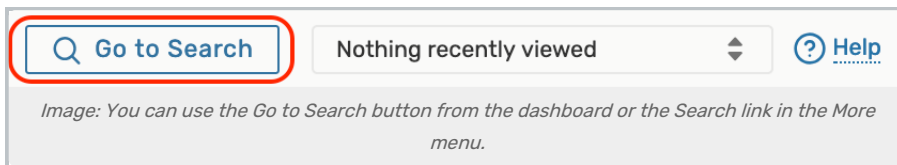- Inherit Events (This option is exclusive to instances that do not use LYNX)

> 🔒 **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: Admin: 1.0 *Bulk Editing on Location Assignments*.
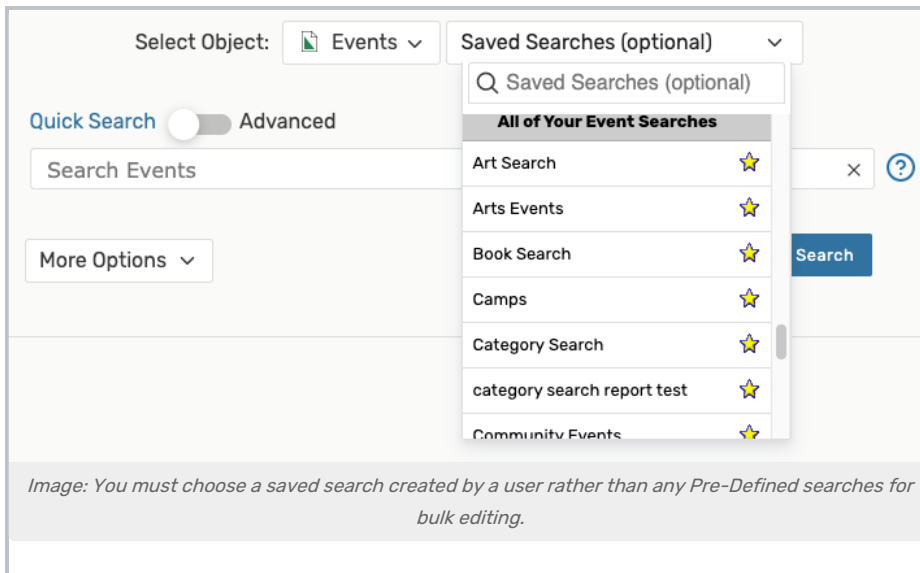
How to Bulk Edit Events

1. Go to the Search Section

Image: You can use the Go to Search button from the dashboard or the Search link in the More menu.

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

Image: You must 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 choose the search you want to use from the **Saved Searches** dropdown menu. 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.
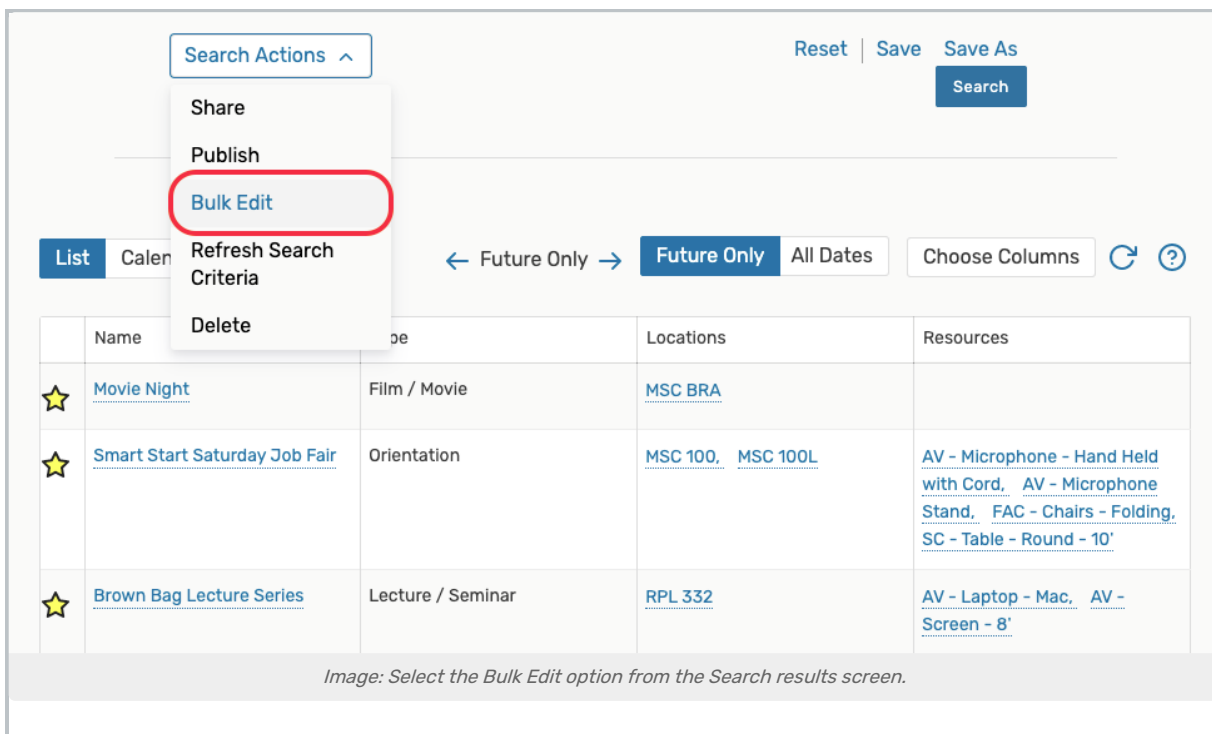
> **Reminder: Choose a User Saved Search**
>
> You may not choose from the **Pre-Defined Groups** list of searches (such as Your Starred Events) when bulk editing events.
>
> If you don't currently have a saved search available that includes all the events you want to bulk edit, you may create and save a new saved search, then come back to the search screen to begin the steps to bulk edit events.
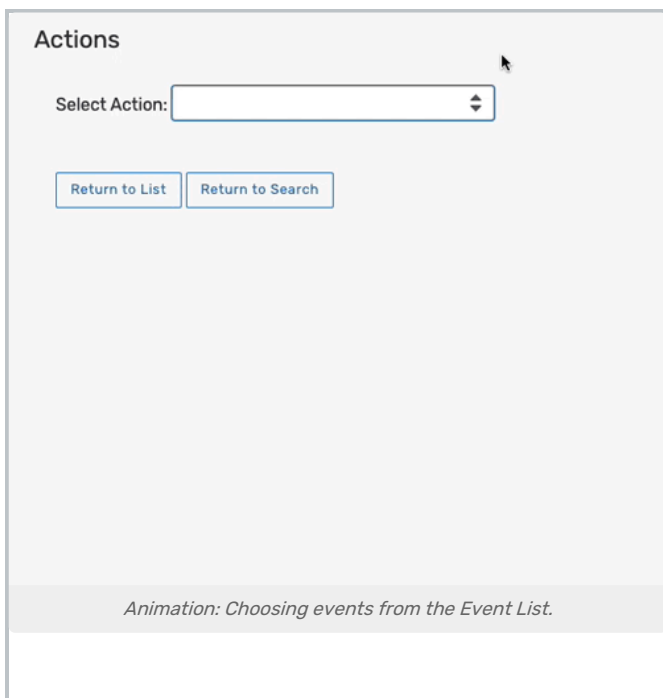
Use the **Search** button to run the search.

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

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

ℹ️ **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.

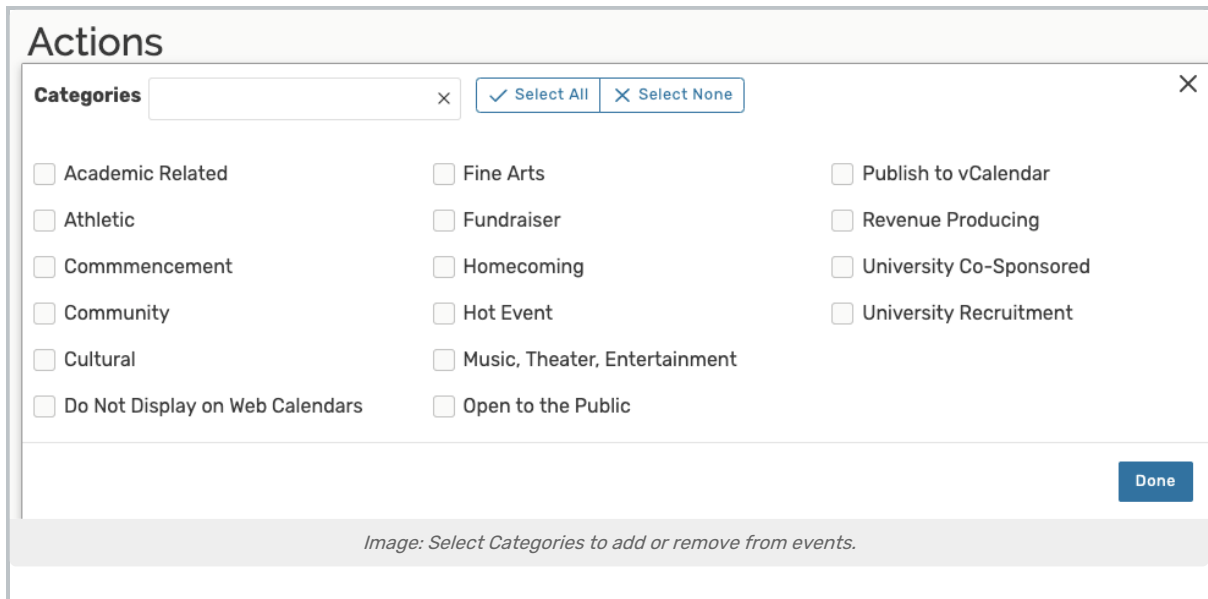*Animation: Choosing events from the Event List.*

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 Categories

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 is not already associated with one of the events, no change will be made when running the action.
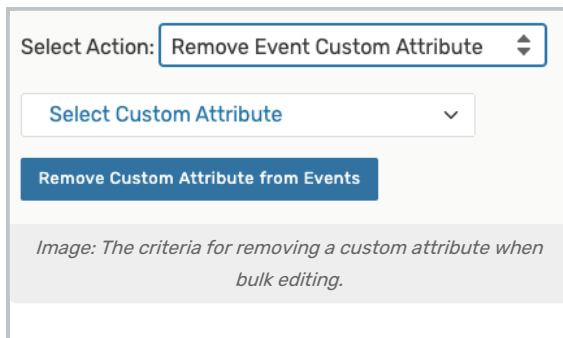
Add/Edit Event Custom Attribute

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.

Remove Event Custom Attribute

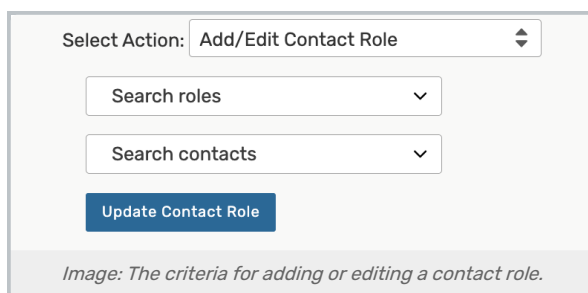*Image: The criteria for removing a custom attribute when bulk editing.*

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

Image: The criteria for adding or editing a contact role.
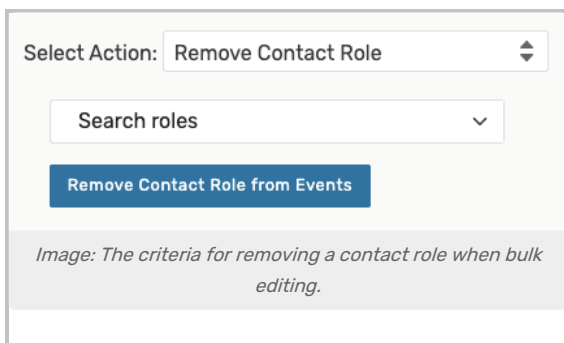
Criteria to Enter

- 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

Select Action: Remove Contact Role

Search roles

Remove Contact Role from Events

Image: The criteria for removing a contact role when bulk editing.

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

Select Action: Edit Event Name

Regular Expression Find & Replace

Find

☐ All Instances
☐ Case Sensitive

Replace:

Preview   Update Event Names

Image: The criteria for editing names and titles when bulk editing.

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 Fair
☐ All Instances
☐ Case Sensitive
Replace: Expo

[Preview] **Update Event Names**

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.

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

> **ℹ 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

Select Action: Edit Primary Organization

Search organizations

Edit Event Primary Organization

Image: The criteria for editing the primary organization when bulk editing.

> **⚠ 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.
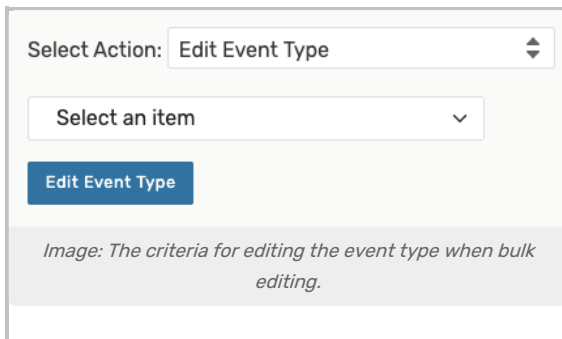
Criteria to Enter

- 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

Select Action: Edit Event Type

Select an item

Edit Event Type

Image: The criteria for editing the event type when bulk editing.

Criteria to Enter

- Select an event type from the **Select from Types** dropdown.
- Use the **Update Event 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

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.

Unassign Locations

Image: The criteria for unassigning locations when bulk editing.

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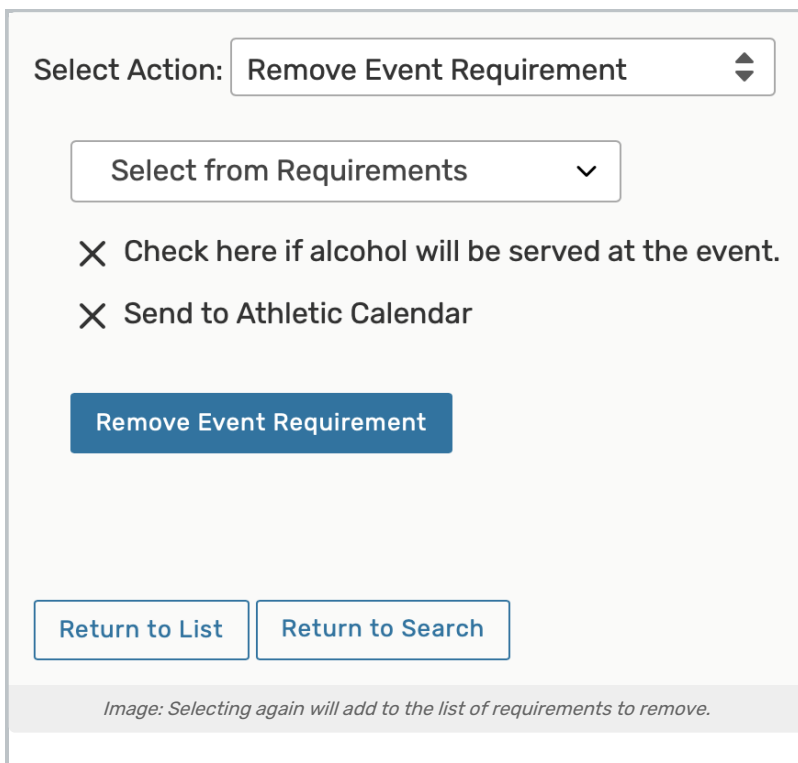
Image: Comments are available to also add to the event with requirements.

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.

Remove Event Requirement

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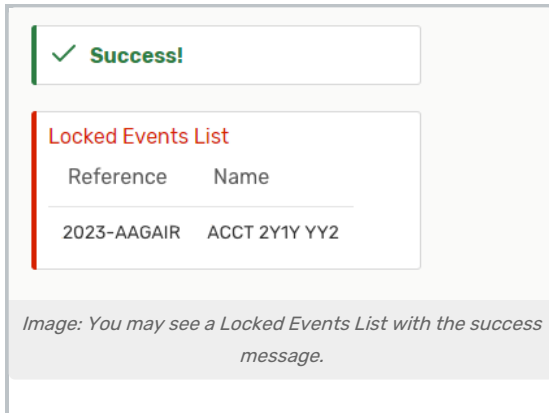> Deleting an event is permanent and cannot be reversed. Deleting events will also remove all references to them.

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

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

Image: You may see a Locked Events List with the success message.

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.