

## Bulk Editing Locations

25Live allows for editing multiple locations (in bulk) based on saved location searches.



### Security Note

Bulk editing of locations can be opened up to users who are not in the (-1) administrator group using the [Series25 Group Administration tool permissions](#):

Administrative: 10.0 *Edit Locations* and

Administrative: 24.0 *Override Location Security*

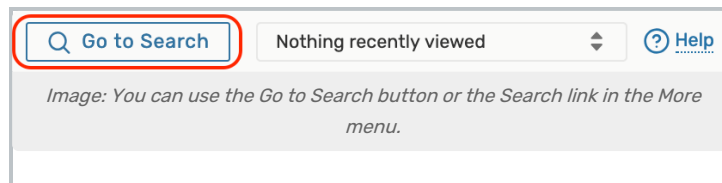
If you would like your permissions changed, contact your Series25 administrator.

If an administrator wishes to only open bulk editing rights for specific actions, see the list below.

- For the "Edit Location Policy" action, Administrative: 10.4 *Set Location Notification Policy*
- For the "Delete Locations" action, Administrative: 10.1 *Delete Locations*
- For the "Edit Location Hours" action, Administrative: 10.6 *Edit Location Open/Closed/Blackout Hours*

## How to Bulk Edit Locations

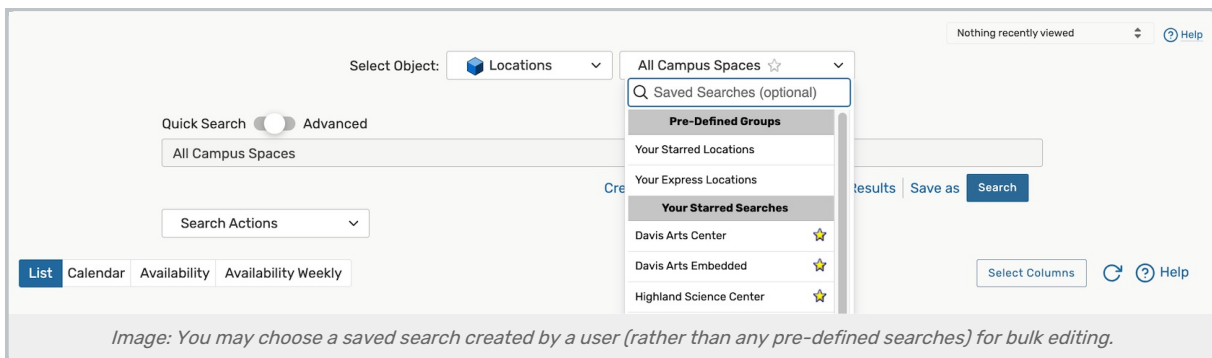
### 1. Go to the Location Search Section



*Image: You can use the Go to Search button 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 Location Search or Perform a Search



*Image: You may choose a saved search created by a user (rather than any pre-defined searches) for bulk editing.*

Be sure the **Locations** 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 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 Searches) when bulk editing locations. Instead, choose from your saved searches under **All of Your Searches**.

If you don't currently have a saved search available that includes all the locations you want to bulk edit, you may [perform a new search](#) or [create and save a new saved search](#), then come back to bulk edit those locations.

Use the **Search** button to run the search if the search doesn't automatically load.

### 3. Choose From the Locations List after Selecting the Bulk Edit Option

The screenshot shows a search results interface with tabs for 'List', 'Calendar', 'Availability', and 'Availability Weekly'. On the right, there are buttons for 'Select Columns', 'Bulk Edit' (highlighted with a red box), a refresh icon, and a 'Help' icon. Below the tabs, it says '73 Matching Locations'. A table with columns: Name, Formal Name, Categories, Features, Layouts, Max Capacity, Default Capacity, and Building. One row is visible with a star icon, '1B/C 12', '1B/C 12 Art Class Lab', 'Type - 210 Class Lab', 'Active - Not On Abridged List', '20', '20', and 'Active - Not On Abridged List'. Below the table, a caption reads: 'Image: You may choose to use the Bulk Edit button from the search results of a new search.'

The screenshot shows the search interface with 'Select Object: Locations' and 'All Campus Spaces'. There are buttons for 'Quick Search', 'Advanced', 'All Campus Spaces', 'Create New Location', 'Reset', 'Export Results', 'Save as', and 'Search'. A 'Search Actions' dropdown menu is open, showing options: 'Share', 'Publish', 'Bulk Edit' (highlighted), and 'Refresh Search Criteria'. Below the dropdown, it says '338 Matching Location'. A table with columns: Name, Categories, Features, Layouts, Max Capacity, Default Capacity, and Building. Below the table, a caption reads: 'Image: Selecting the Bulk Edit option from the Search Actions dropdown menu.'

**Note: Bulk Selection is Limited**

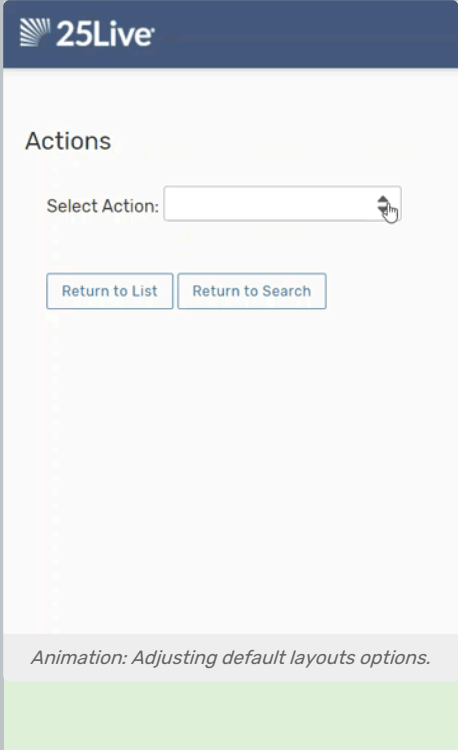
Selection for bulk editing is currently limited to 1,000 locations or less to optimize performance.

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.

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

**Tip: Mass Adjusting Default Layouts**

When you need to adjust the default layout for multiple locations at once:



The screenshot shows the 25Live interface. At the top is the 25Live logo. Below it is the 'Actions' section. There is a 'Select Action:' dropdown menu with a hand cursor icon. Below the dropdown are two buttons: 'Return to List' and 'Return to Search'. At the bottom of the screenshot area, there is a caption: 'Animation: Adjusting default layouts options.'

- Select the **Add/Edit Layouts** option
- Set **Create New Layout** to **No**
- Select the desired layout
- Set **Update Capacity for Existing** to **No**
- Check the **Set as Default Layout** box

See the video demonstration example.

#### 4. Select and Run Available Actions

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

#### Add/Edit Layouts

The screenshot shows a configuration panel with the following sections:

- Create New Layout:** A toggle switch set to 'Yes'.
- Select Layout:** A dropdown menu with the text 'Select from Layouts'.
- Update Capacity for Existing:** A toggle switch set to 'Yes'.
- Calculate New Layout Capacity Using:** Two toggle switches, 'Flat Number' (selected) and 'Percentage'.
- Add/Subtract Current Layout Capacity:** A toggle switch set to 'Yes'.
- Layout Capacity:** A numeric input field.
- Default Layout:** A checkbox labeled 'Set as Default Layout'.
- Layout Image:** Two toggle switches, 'Remove' and 'Add/Edit'.
- Layout Diagram:** Two toggle switches, 'Remove' and 'Add/Edit'.

At the bottom of the panel, there is a grey bar with the text: *Animation: Options when adding or editing layouts.*

Switch the **Create New Layout** toggle:

- **No** to edit an existing layout
  - If you're creating a new layout, name it
- **Yes** to create a new one
  - If you're editing an existing layout, select it from the dropdown

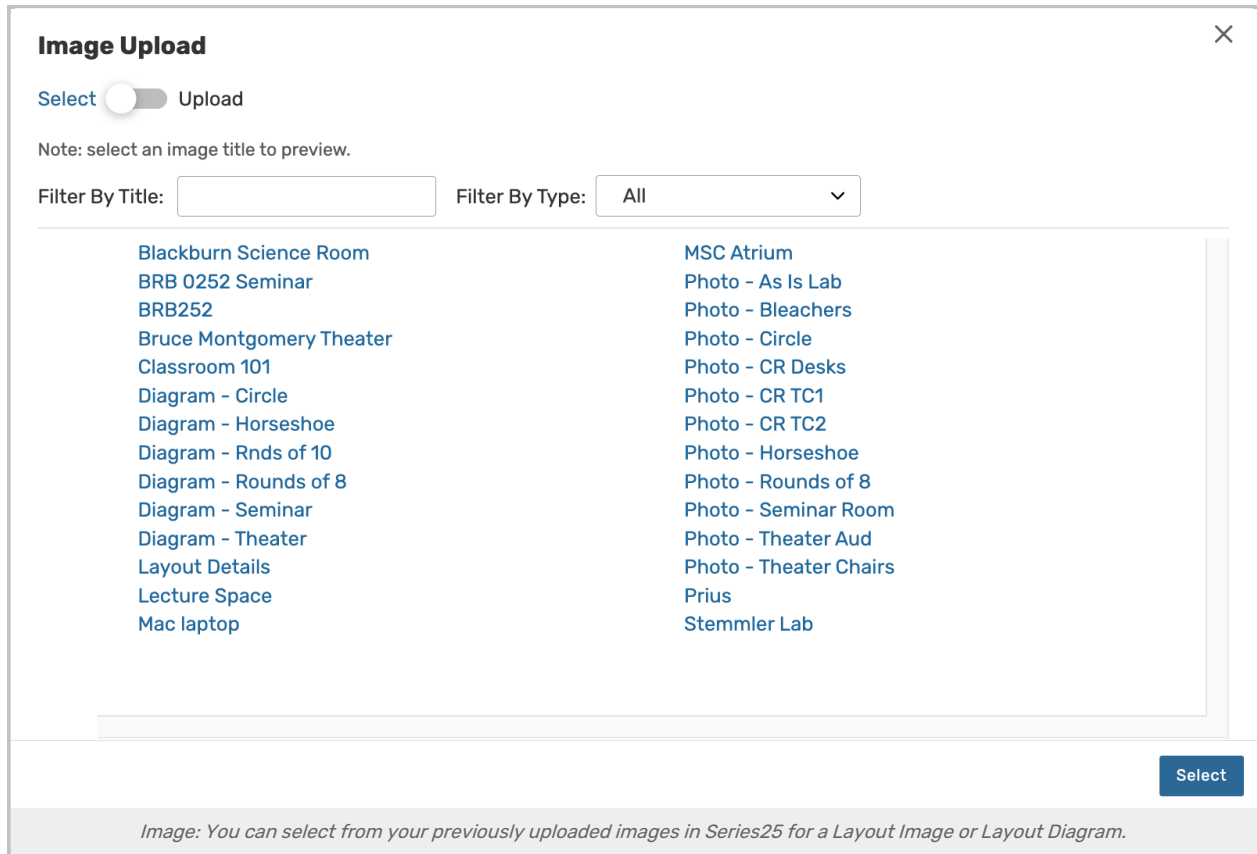
Set the **Update Capacity for Existing** toggle to **Yes** to add or update the selected layout and apply the percentage max capacity.

- Set the **Calculate New Layout Capacity Using** toggle depending on whether you'd like to use a **Flat Number** or **Percentage**
- Use the **Add/Subtract Current Layout Capacity** toggle depending on whether you wish to change
  - Options will become available to set the **Layout Capacity** or to **+/- Current Layout Capacity**

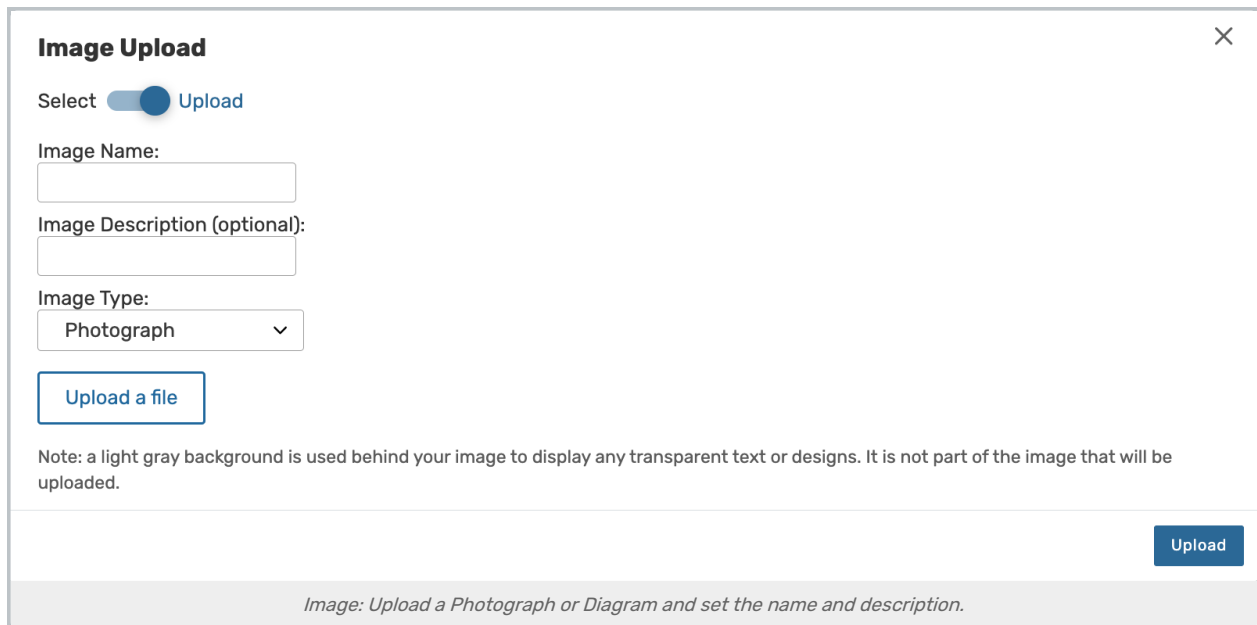
Check the **Set as Default Layout** box if you want this to be the default, whether you are adding a new layout or editing an existing layout.

You also have two image options to edit:

- **Layout Image** - a simple image of the layout when set up
- **Layout Diagram** - an image showing how the layout is set up, often in the form of a line drawing



For both of these options, change the **Remove - Add/Edit** toggle. If you are adding or editing (changing) either image, use the **Edit** link to view the 25Live image dialog where you can use the toggle to **Select** an image from your Series25 library of previously uploaded images or choose to **Upload** a new image.



Use the **Update Layout** button to save the changes.



### Tip: Planning to Transition Between Different Capacities?

If you need to plan to transition or build a hybrid social distancing schedule between capacities, see [Managing Location Capacities for Pandemic Planning](#) (*Series25 Customer Resources login required*) for best practices and advice.

### Example: Adding a New Layout

For example, if the location(s) you're editing has a max capacity of 100. To add a new "Social Distancing" layout with a third of that location's max capacity, you'd name the layout, enter 33 as the **Percent of Location Max Capacity**, and click **Add/Edit Layout**.



### Note: Capacity is Always Rounded Down

The calculated layout max capacity is always rounded down to the next lower whole number.

## Remove Layouts

Use the **Select Layouts** button to choose the layouts you'd like removed

Confirm your selections

Select the **Remove Layouts** button to remove the selected layouts from your locations

## Edit Location Capacity

**Actions**

Select Action: Add/Edit Layouts

**Create New Layout**  
No  Yes

**New Layout Name**

**Update Capacity for Existing**  
No  Yes

**Calculate New Layout Capacity Using**  
Flat Number  Percentage

**Add/Subtract Current Layout Capacity**  
No  Yes

**Layout Capacity**

**Default Layout**  
 Set as Default Layout

*Animation: Options when editing an existing location's overall capacity.*

Using the **Select Action** list, choose **Edit Location Capacity**.

- Set the **Calculate New Max Capacity Using** toggle depending on whether you'd like to use a **Flat Number** or **Percentage**
- Use the **Add/Subtract Current Max Capacity** toggle depending on whether you wish to change
  - Options will become available to set the **Location Max Capacity** or to **+/- Current Max Capacity**

Use the **Update Capacity** button to save the changes.

### Example: Editing Overall Location Capacity

For example, for the location in the first image below, there is an overall **Max Capacity** of 44 with five layouts (one of them a new Social Distance layout).

Layouts	
	Capacity
<b>Max Capacity</b>	<b>44</b>
Social Distance (default)	26
Banquet	26
Open	44
Tables - Round	18
U-shape	44

*Image: The layouts and capacities before...*

Layouts	
	Capacity
<b>Max Capacity</b>	<b>22</b>
Social Distance (default)	13
Banquet	13
Open	22
Tables - Round	9
U-shape	22

*Image: The layouts and capacities after entering 50 percent Location Max Capacity.*

To decrease the location's max capacity and that of its layouts by half, you'd enter 50 as the **Percentage of Location Max Capacity** which would result in the capacity changes in the second image above.

It's easy to double the capacity again (200 percent) when you're ready to move back to full capacity.

### Edit Location Fill Ratio

Enter a **Location Fill Ratio** percentage number.

Use the **Update Fill Ratio** button to save.

### Edit Location Comments

Type within the rich text editor to add or edit comments for the locations, including text styling.

Use the **Update Comments** button to save.

### Edit Location Default Setup Instructions

Type within the rich text editor to add or edit instructions for the locations, including text styling.

Use the **Update Default Set Up Instructions** button to save.

### Edit Location Partition

Use the **Select an item** dropdown menu to choose an available location or "No Partition".

The **Update Partition** button will save your change.

### Add/Remove Location Scheduler

Toggle the **Add/Remove Scheduler** control to the desired action. Then, search and choose from the **Select Scheduler** dropdown menu.

Use the **Add (or Remove) Scheduler** button to commit the change.



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

Adding, changing, or removing a scheduler can affect your event/course workflow, interrupt or remove important notifications, and affect approvals.

### Add/Remove Location Categories

Toggle the **Add/Remove Categories** control according to whether you wish to **Add** or **Remove**.

Use the **Select Categories** button to reveal a category search with checkboxes. Save using the **Done** button in that display.

The **Add (or Remove) Categories** button will save your choices.

See [Adding and Editing Categories](#) in Master Definitions.

### Add/Remove Location Features

Toggle the **Add/Remove Features** control according to whether you wish to **Add** or **Remove**.

Use the **Select Features** button to reveal a feature search with checkboxes. Save using the **Done** button in that display.

The **Add (or Remove) Categories** button will save your choices.

See [Adding and Editing Features](#) in Master Definitions.

### Edit Notification Policy

With the **Update Notify Type Only** toggle, choose between **No** or **Yes**.

- **Yes**
  - Select from **Notify Only** or **Approval Required**
- **No**
  - Use the **Update Notification Policy By** toggle to choose between **Contacts** or **Template** as an organizing option.
    - If by **Contacts**, toggle the **Add/Remove Contacts** control to reveal the **Select Contacts** button. You can then search and select one or more contacts to add or remove.
    - If by **Template**, **Select Template** and select from the **Approval Type** dropdown menu.

Use the **Update Notification Policy** button to save.

### Add/Edit Location Custom Attributes

Choose from the dropdown menu, then complete any fields revealed by your choice.

Use the **Update Custom Attributes** button to save.



See [Adding and Editing Custom Attributes](#) in Master Definitions.

### Remove Location Custom Attributes

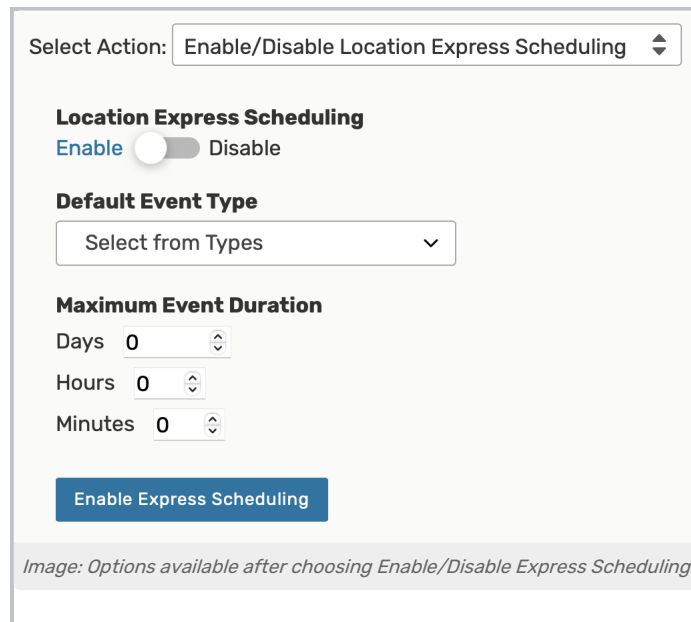
Choose from the dropdown menu, then use the **Remove Custom Attributes** button to save.

### Add/Remove Location Relationships

Toggle the **Relationships** control to **Add** or **Remove**. Then **Select a relationship** and use the **Select Locations** button.

Save using the **Update Relationships** button.

### Enable/Disable Location Express Scheduling



You may toggle the **Location Express Scheduling** control to **Enable** or **Disable** for the location(s).

If enabling:

- Select the **Default Event Type** to set it for the location(s)
- Set the **Maximum Event Duration** using the arrows in the **Days**, **Hours**, **Minutes** fields or typing numbers

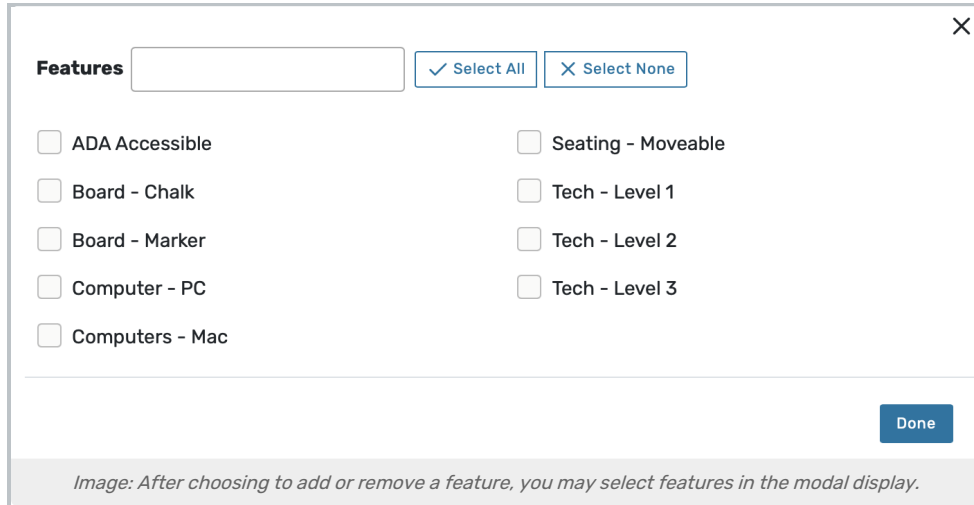
Save your choices using the **Enable Express Scheduling** button.

### Add Optimizer Effective Dating

Changes for items based on date can be added in bulk to multiple locations to be used in the [Schedule25 Optimizer](#) with Effective Dating. See [Using Optimizer Effective Dating in 25Live](#) for more.

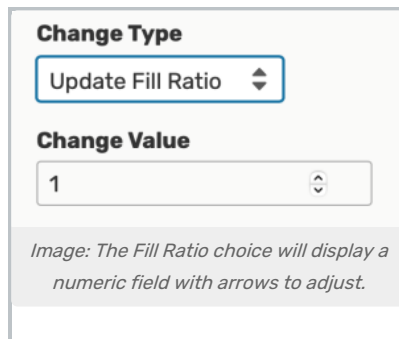
Edit the **Effective Date** field. 25Live will add a default date. If you wish to edit the date, tap or click in the date's field to choose a different date.

Then, use the **Change Type** field to select your change. Feature Change Type



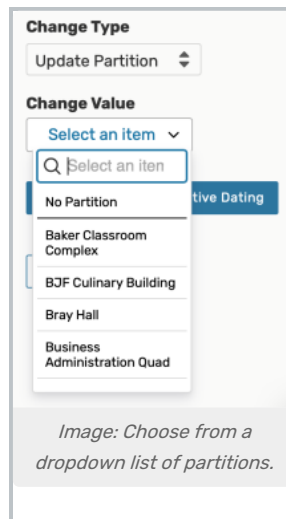
Use the **Select Features** button to open the display where you may select one or more features. Check the boxes next to features you'd like to add or remove, then use the **Done** button to save your choices.

### Fill Ratio Change Type



After selecting **Update Fill Ratio** from the **Change Type** dropdown menu, you can edit the numeric field in the **Change Value** field by typing a positive number or using the arrows to adjust the number up or down.

### Partition Change Type



Select **Update Partition** from the **Change Type** dropdown menu. Then, use the **Change Value** dropdown menu to

select from available partitions.

### Capacity Change Type

After selecting **Update Capacity** from the **Change Type** dropdown menu, you can edit the numeric field in the **Change Value** field by typing a positive number or using the arrows to adjust the number up or down.

After setting up your change, use the **Update Optimizer Effective Dating** button to save your change. A success message will appear. You can then use the **Return to List** button.

### Edit Location Hours

**Actions**

Select Action:

**Monday**  
 -   Update

**Tuesday**  
 -   Update

**Wednesday**  
 -   Update

**Thursday**  
 -   Update

**Friday**  
 -   Update

**Saturday**  
 -   Update

**Sunday**  
 -   Update

*Image: Update location hours by ticking the Update checkbox, entering a new start/end time, and clicking Update Location Hours*

Under each weekday that you'd like to update, tick the **Update** checkbox

Enter a new start and/or end time OR select **Close**

Use the **Update Location Hours** button to save your changes

### Delete Locations



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

Deleting a location is permanent and cannot be reversed. Deleting locations will also remove all references to them, including assignments to events.

Toggle **Delete Mode** from **Off** to **On**

Be sure to note the warning

Use the **Delete** button

### Edit Location Building

To add a Building to your locations, choose from the **Select Building** dropdown

OR

Remove a Building from your locations by selecting **No Building** from the **Select Building** dropdown

Click **Update Building**

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