# 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 Options > 10.0 Create, Edit and Copy Locations* and *Administrative Options > 21.0 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 Options > 10.4 Set Location Notification Policy*
> - For the "Delete Locations" action, *Administrative Options > 10.1 Delete Locations*
> - For the "Edit Location Hours" action, *Administrative Options > 10.6 Edit Location Open/Closed/Blackout Hours*

## How to Bulk Edit Locations

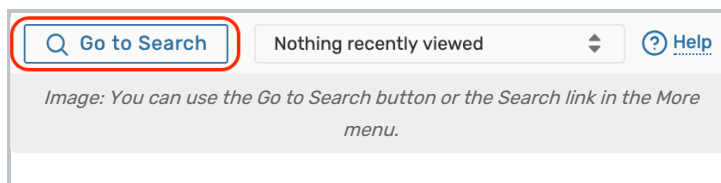### 1. Go to the Location Search Section



*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.
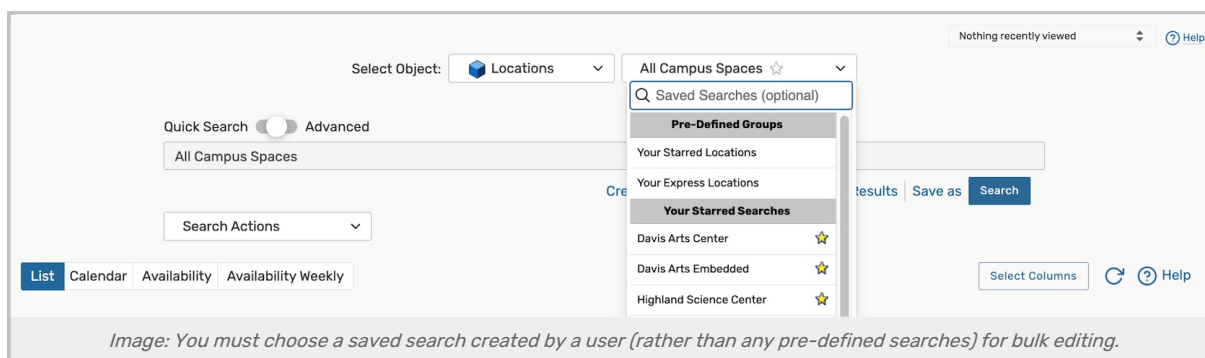
### 2. Choose a Saved Location Search



*Image: You must 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 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 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 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 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.

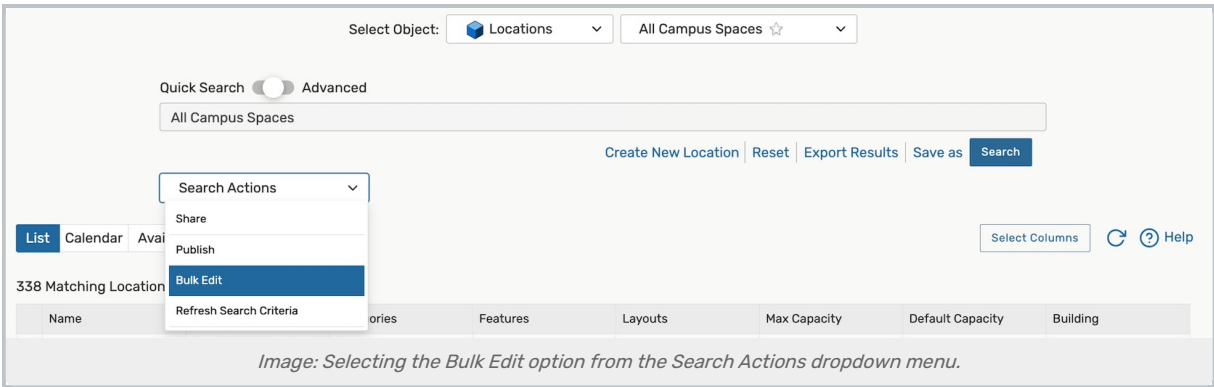## 3. Choose From the Locations List after Selecting the Bulk Edit Option



*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.
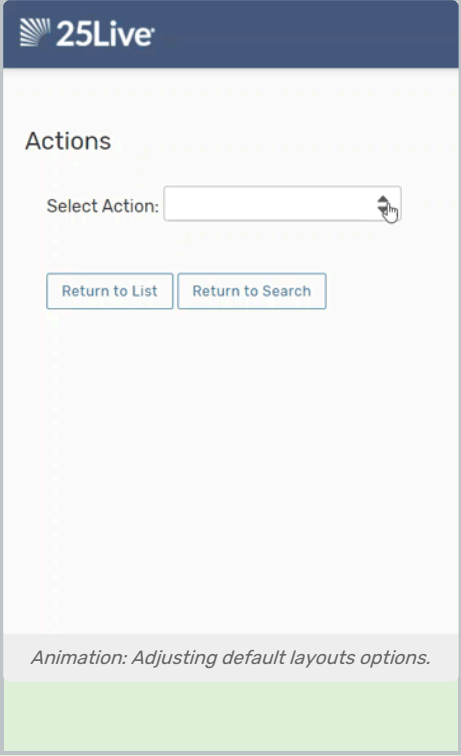
On the search screen, use the **Search Actions** dropdown to select the **Bulk Edit** option.

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:

*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

*Animation: Options when adding or editing layouts.*

Switch the **Create New Layout** toggle:

- to **No** to edit an existing layout
  - If you're creating a new layout, name it

- or to **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

**Image Upload**

Select ⬤ Upload

Note: select an image title to preview.

Filter By Title: [        ]     Filter By Type: [ All ▾ ]

| | |
|---|---|
| Blackburn Science Room | MSC Atrium |
| BRB 0252 Seminar | Photo – As Is Lab |
| BRB252 | Photo – Bleachers |
| Bruce Montgomery Theater | Photo – Circle |
| Classroom 101 | Photo – CR Desks |
| Diagram – Circle | Photo – CR TC1 |
| Diagram – Horseshoe | Photo – CR TC2 |
| Diagram – Rnds of 10 | Photo – Horseshoe |
| Diagram – Rounds of 8 | Photo – Rounds of 8 |
| Diagram – Seminar | Photo – Seminar Room |
| Diagram – Theater | Photo – Theater Aud |
| Layout Details | Photo – Theater Chairs |
| Lecture Space | Prius |
| Mac laptop | Stemmler Lab |

[ Select ]

*Image: You can select from your previously uploaded images in Series25 for a Layout Image or Layout Diagram.*

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.

**Image Upload**

Select ⬤ Upload

Image Name:
[        ]

Image Description (optional):
[        ]

Image Type:
[ Photograph ▾ ]

[ Upload a file ]

Note: a light gray background is used behind your image to display any transparent text or designs. It is not part of the image that will be uploaded.

[ Upload ]

*Image: Upload a Photograph or Diagram and set the name and description.*

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**.

> ℹ️ **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



*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 |
|---|---|
| Max Capacity | 44 |
| Social Distance (default) | 26 |
| Banquet | 26 |
| Open | 44 |
| Tables – Round | 18 |
| U-shape | 44 |

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

| Layouts | Capacity |
|---|---|
| Max Capacity | 22 |
| 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.

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## 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.
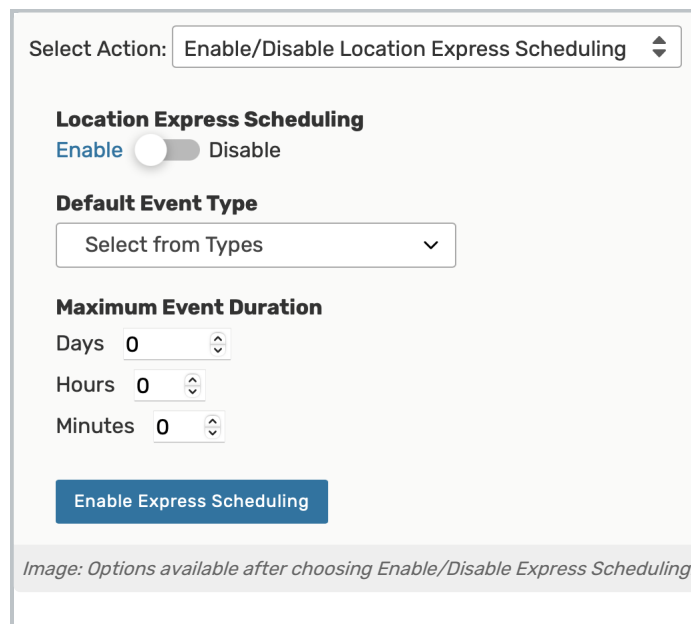
## Remove Location Custom Attributes

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



Image: Options available after choosing Enable/Disable 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
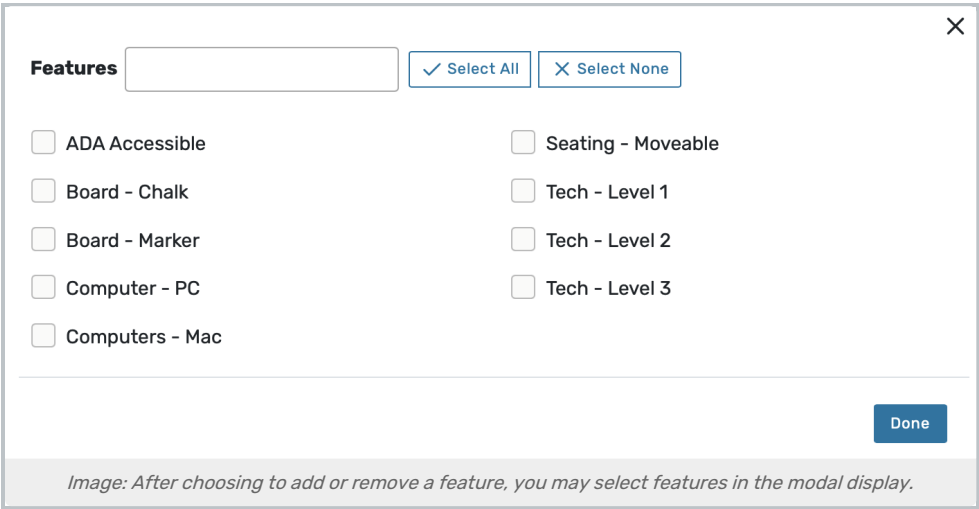
Save your choices using the **Enable Express Scheduling** button.

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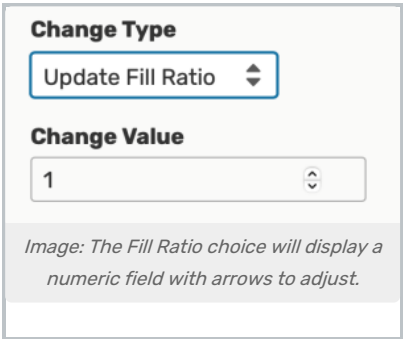
Edit the **Effective Date** field. 25Live will add a default date. If you wish to edit the date, tap or click in the date's field to choose a different date.

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

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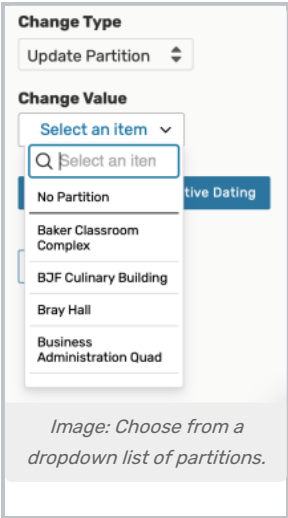
Use the **Select Features** button to open the display where you may select one or more features. Check the boxes next to features you'd like to add or remove, then use the **Done** button to save your choices.

## Fill Ratio Change Type



*Image: The Fill Ratio choice will display a numeric field with arrows to adjust.*

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



*Image: Choose from a dropdown list of partitions.*

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

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**