

Bulk Editing Resources

25Live allows for editing multiple resources (in bulk) based on resource searches.



Security Note

Bulk editing of resources 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*

Administrative: 24.0 *Override Location Security*

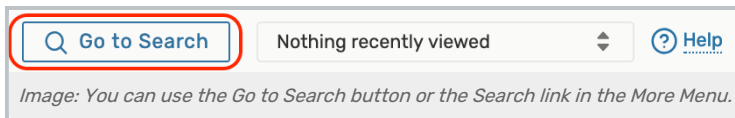
If you would like your permissions changed, contact your Series25 administrator.

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

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

How to Bulk Edit Resources

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 Resource Search or Perform a Search

Select Object: Resources

Quick Search ☐

Advanced

Search Resources

Hint! Type :: to use SeriesQL.

Categories +

Saved Searches (optional)

Q Saved Searches (optional)

Pre-Defined Groups

Your Starred Resources

Your Starred Searches

Catering Resources

Student Center Media Equipment

All of Your Searches

Catering Resources

Student Center Media Equipment

Search

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

Be sure the **Resources** search type is selected, and perform a search or choose the search you want to use. 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. 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 resources 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 resources.

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

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

ListCalendarAvailability

Select Columns

Bulk Edit

Help

4 Matching Resources

Name	Categories	Custom Attributes	Quantity
AV - Laptop - Mac	Wednesday Test 70 Resources, Wednesday Test 60 Resources, Wednesday Test 50 Resources, Wednesday Test 77 Resources, Media Services	Deposit for Use (\$), Test1	17
AV - Laptop - PC	Wednesday Test 70 Resources, Wednesday Test 60 Resources, Wednesday Test 50 Resources, Wednesday Test 77 Resources, Media Services	Deposit for Use (\$), Image Attribute, Last Service Date	17
Laptop (PC)-AUD/Wabash	Media Services		7
RMU Laptop - PC			7

Image: You may choose to use the Bulk Edit button from the search results of a new search.

The screenshot displays the search interface for CollegeNET Series25. At the top, there is a 'Select Object:' section with a dropdown menu set to 'Resources' and a search box containing 'Student Center Media Eq...'. Below this, a toggle switch for 'Quick Search' is set to 'Advanced'. A search bar contains the text 'Student Center Media Equipment'. To the right of the search bar are buttons for 'Reset', 'Export Results', 'Save', 'Save As', and a blue 'Search' button. Below the search bar, a 'Search Actions' dropdown menu is open, showing options: 'Share', 'Bulk Edit' (highlighted with a red rectangle), 'Refresh Search Criteria', 'Delete', and 'Export Results'. To the right of the dropdown menu is a 'Choose Columns' button. At the bottom of the interface, a caption reads: 'Image: Selecting the Bulk Edit option from the Search Actions list with a saved search.'



Note: Bulk Selection is Limited

Selection for bulk editing is currently limited to 1,000 objects 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 **Resource List** screen allows you to check which locations you want to bulk edit. After selecting, use the **Go to Actions** button to continue.

4. Select and Run Available Actions

Resource List

Cancel

Go to Actions

17 Matching Resources

<input type="checkbox"/>	Name ^	Quantity
<input checked="" type="checkbox"/>	AV - Blu-ray Player	2
<input checked="" type="checkbox"/>	AV - Data Projector	5
<input type="checkbox"/>	AV - DVD Player	5
<input type="checkbox"/>	AV - Extension Cords	15
<input type="checkbox"/>	AV - Laptop - Mac	15
<input type="checkbox"/>	AV - Laptop - PC	15
<input type="checkbox"/>	AV - Microphone - Hand Held Wireless	5
<input type="checkbox"/>	AV - Microphone - Hand Held with Cord	5
<input type="checkbox"/>	AV - Microphone - Lapel	2
<input type="checkbox"/>	AV - Microphone Stand	8

Animation: Resource bulk editing 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.

To cancel your current action, use either **Return to List** button or **Return to Search**.

Edit Resource Comments

Type within the rich text editor to add or edit comments for the resources, including text styling. Use the **Update Comments** button to save.

Edit Resource Default Setup Instructions

Type within the rich text editor to add or edit instructions for the resources, including text styling. Use the **Update Default Set Up Instructions** button to save.

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/Remove Resource 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/Edit Resource Custom Attributes

Choose from the **Select Custom Attribute** dropdown menu, then complete any fields revealed by your choice. Multiple values are available to bulk edit where needed.

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

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

Remove Resource Custom Attributes

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

Add/Remove Resource Relationships

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

Save using the **Update Relationships** button.

Add Resource Stock Totals

Use the small arrows to adjust the **Stock Totals** number up or down or type a numeric value in the field. Then, use the calendar controls to set a **Start Date** and **End Date**.

Save using the **Update Stock Totals** button.

Delete Resource



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

Deleting a resource is permanent and cannot be reversed. Deleting resources 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
