Bulk Editing Organizations

25Live allows for editing multiple organizations (in bulk) based on saved organization searches.

> 🔒 **Security Note**
>
> Bulk editing of organizations can be opened up to users who are not in the (-1) administrator group using the Series25 Group Administration tool permission:
> Administrative: 15.0 *Edit Organizations*
> Administrative: 28.0 *Override Organization Security*
>
> If you would like your permissions changed, contact your 25Live administrator.
>
> If an administrator wishes to only open bulk editing rights for specific actions, please expand the list below for details.
>
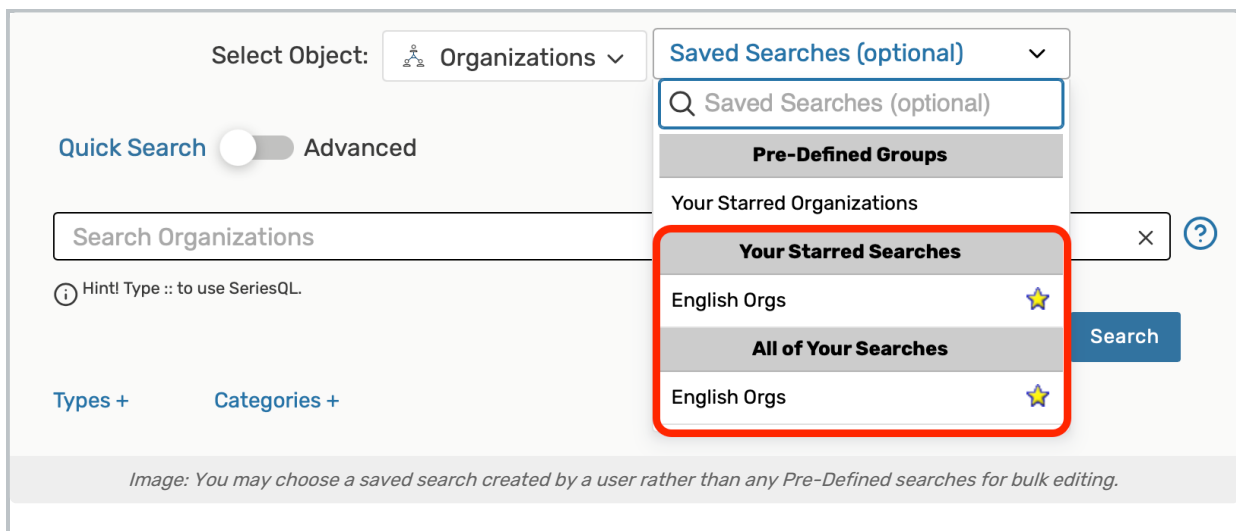> ⊠ **Details for Specific Bulk Editing Permissions**

How to Bulk Edit Organizations

1. Go to the Search Section

Image: You can use the Go to Search button or the Search link in the More menu.
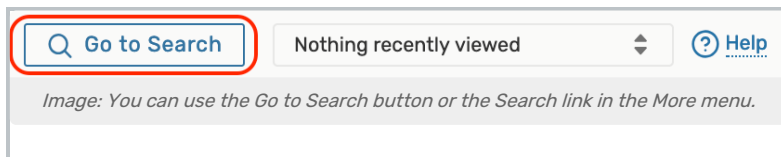
Navigate to the Search section using the **Go to Search** button in the top navigation bar. There is also a Search link in the **More** menu in the top navigation.

2. Choose a Saved Organization 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 **Organizations** 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.

> ℹ️ **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**.
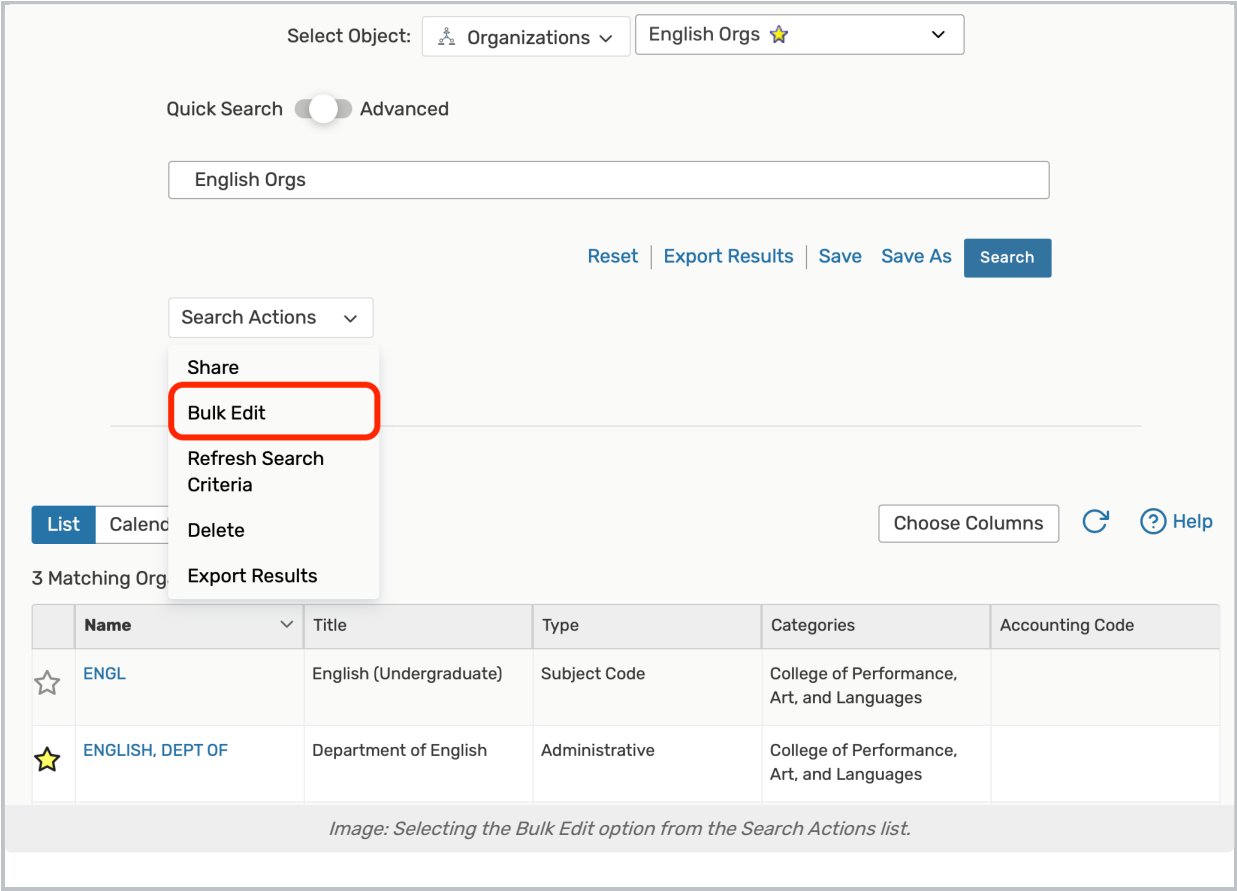
If you don't currently have a saved search available that includes all the organizations you want to bulk edit, you may perform a new search or create and save a new saved search, then come back to bulk edit those organizations.

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

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

Image: Selecting the Bulk Edit option from the Search Actions list.

> ℹ **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 **Organization 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

Animation: Organization 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 Organization Comments

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

Edit Organization Types

Select Type and use the **Update Type** button to save.

See Adding and Editing Org Types in Master Definitions.
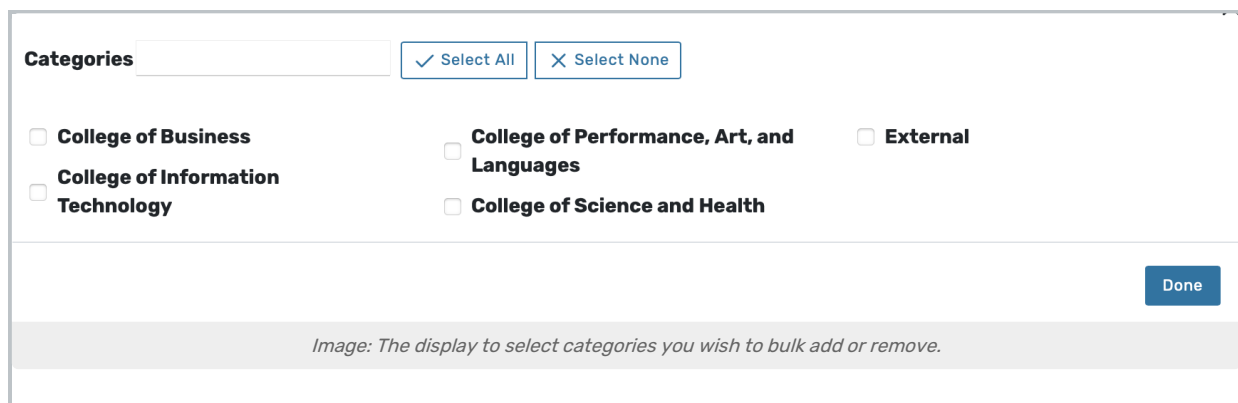
Edit Organization Rating

Select Rating and use the **Update Rating** button to save.

See Adding and Editing Org Ratings in Master Definitions.

Edit Accounting Code

Type in an **Accounting Code** and use the **Update Accounting Code** button to save.

Add/Remove Organization Categories

Categories	✓ Select All	✗ Select None
☐ **College of Business**	☐ **College of Performance, Art, and Languages**	☐ **External**
☐ **College of Information Technology**	☐ **College of Science and Health**	
		Done

Image: The display to select categories you wish to bulk add or remove.

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 Organization Custom Attributes

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

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

See Adding and Editing Custom Attributes in Master Definitions.

Remove Organization Custom Attributes

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

Add/Remove Associated Contacts

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

Use the **Add Contact** dropdown menu to search and/or select a contact, then use the **Add (or Remove)**

Associated Contacts button to save.

Remove Contacts by Roles

Tap the **Select Roles** button, check one or multiple roles from the list, and tap **Done**.

Click **Remove Contact Role** to remove contacts that are in the selected roles from your selected organizations.

Edit Organization Partitions

Images: Use the arrows and X controls to adjust the order and included locations in partition groups.

Use the **New Partition Group** button to create a group of locations.

Your instance's locations are listed within the **Select from Partitions** control. Check the boxes next to the locations you wish to include, then use the **Done** button.

If you create multiple partition groups, use the arrow controls to adjust the order preference of each group.

Save using the **Save Partition Preferences** button.

Removing Items

- Remove any location from a group using the **X** control to the right of each location name.
- To remove a partition group, use the **X** near the arrows to remove a partition group.

Delete Organization

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

Deleting an organization is permanent and cannot be reversed. Deleting organizations will also remove all references to them, including within events.

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

Be sure to note the warning

Use the **Delete** button