

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*

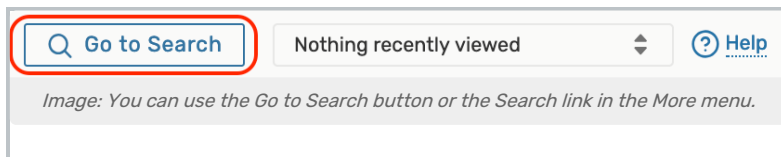
If you would like your permissions changed, contact your 25Live administrator.

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](#)

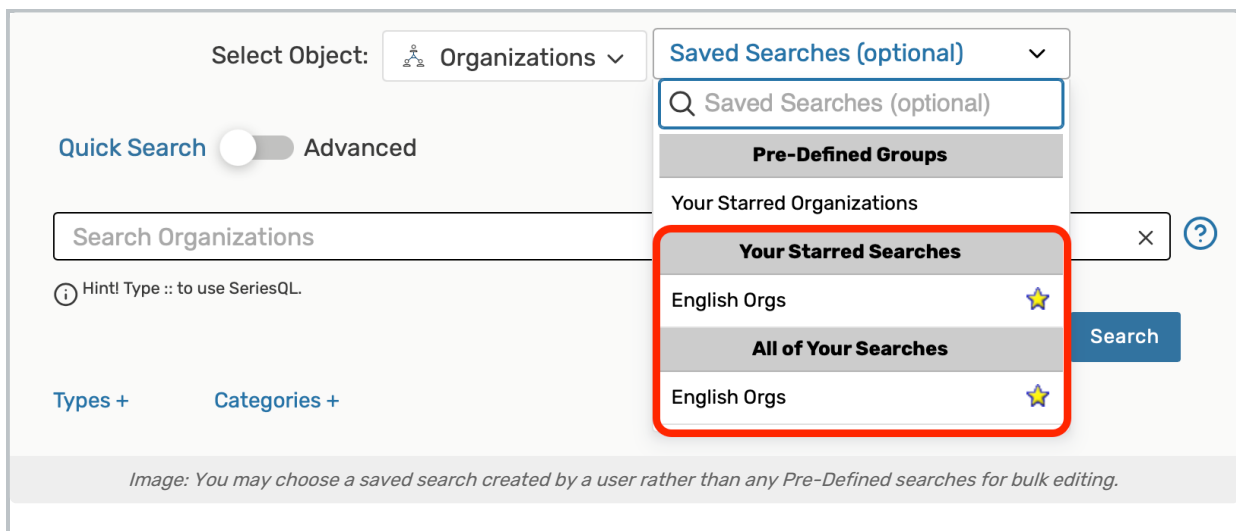
How to Bulk Edit Organizations

1. Go to the Search Section



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



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.



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**.

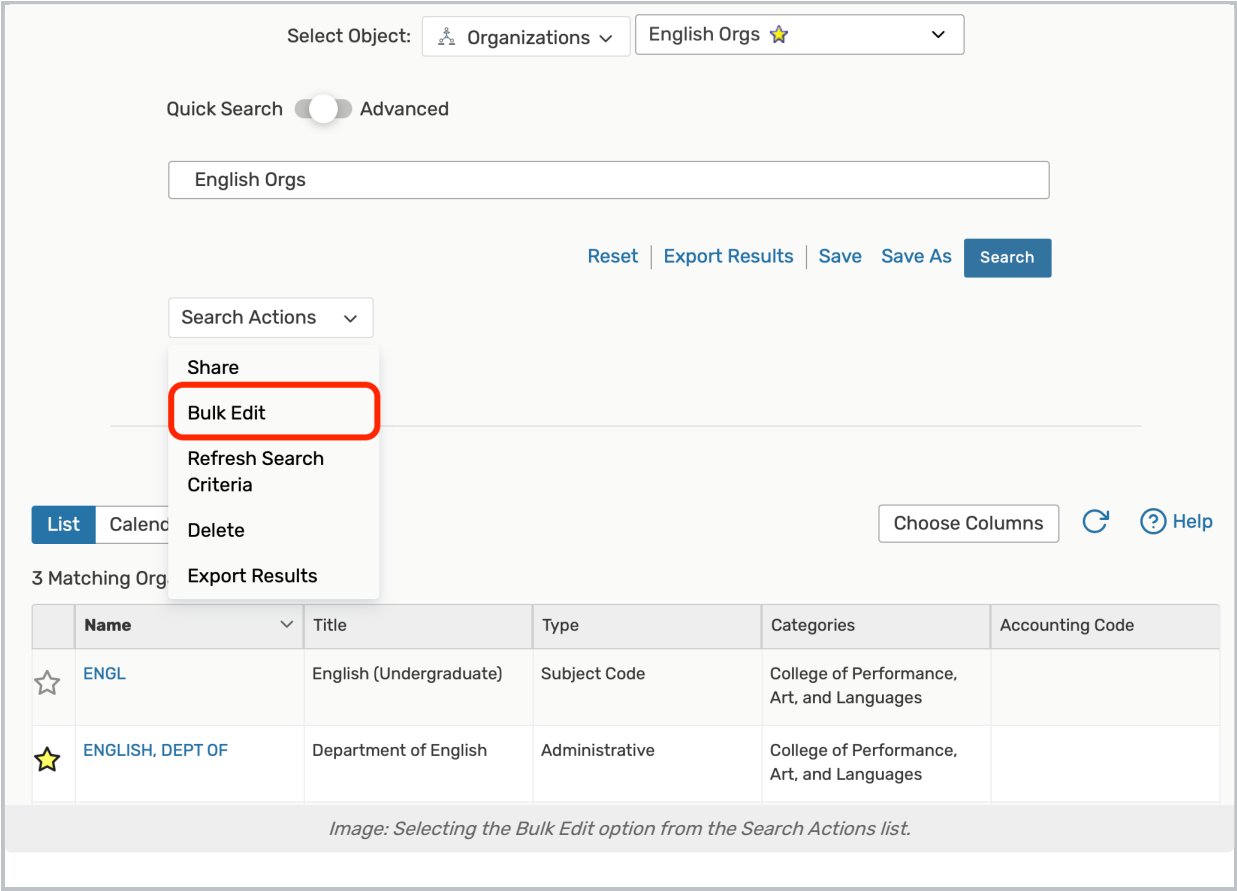
If you don't currently have a saved search available that includes all the organizations you want to bulk edit, you may [perform a new search](#) or [create and save a new saved search](#), then come back to bulk edit those organizations.

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

The screenshot shows the CollegeNET interface with search results. At the top, there are tabs for 'List' and 'Calendar'. On the right, there are buttons for 'Select Columns', 'Bulk Edit' (highlighted with a red box), a refresh icon, and a 'Help' button. Below the tabs, it says '24 Matching Organizations'. A table with 6 columns (Name, Title, Type, Categories, Accounting Code) displays three rows of organization data. Below the table, a caption reads: 'Image: You may choose to use the Bulk Edit button from the search results of a new search.'

Name	Title	Type	Categories	Accounting Code
American Medical Student Assoc	American Medical Student Assoc	Clubs		
COPY OF STUDENTS FOR AN ORWELLIAN SOCIET	Students for an Orwellian Society	Student		
Muslim Student Association	Muslim Student Association	Organizations		



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

Organization List

Cancel

Go to Actions

49 Matching Organizations

<input type="checkbox"/>	Name	Title	Type	Accounting
<input checked="" type="checkbox"/>	ACCT	Accounting	Subject Code	
<input checked="" type="checkbox"/>	ACSC	Actuarial Science	Subject Code	
<input type="checkbox"/>	ACST	American Cultural Studies	Subject Code	
<input type="checkbox"/>	AERO	Aerospace Studies	Subject Code	
<input type="checkbox"/>	ARAB	Arabic	Subject Code	
<input type="checkbox"/>	ARHS	Art History (Graduate)	Subject Code	
<input type="checkbox"/>	ARTH	Art History (Undergraduate)	Subject Code	
<input type="checkbox"/>	BCOM	Business Communication	Subject Code	
<input type="checkbox"/>	BETH	Business Ethics	Subject Code	
<input type="checkbox"/>	BIOL	Biology	Subject Code	
<input type="checkbox"/>	BLAW	Business Law	Subject Code	
<input type="checkbox"/>	BUSN	Business	Subject Code	

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

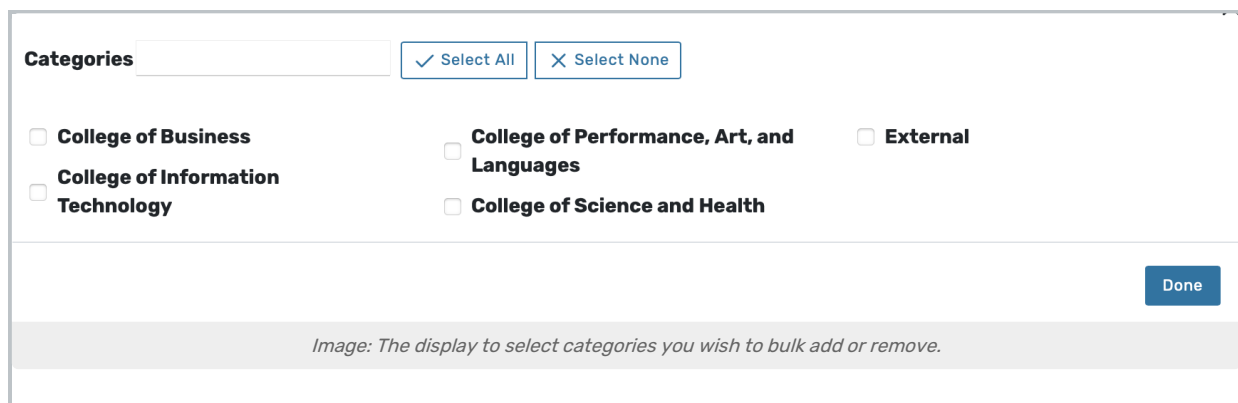
Select **Rating** and use the **Update Rating** button to save.

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

The screenshot shows a dialog box titled "Add/Remove Organization Categories". At the top, there is a "Categories" label followed by a search input field. To the right of the input field are two buttons: "Select All" (with a checkmark icon) and "Select None" (with an 'X' icon). Below the search field, there are six checkboxes arranged in two columns. The first column contains "College of Business", "College of Information Technology", and "College of Performance, Art, and Languages". The second column contains "College of Science and Health" and "External". A "Done" button is located in the bottom right corner of the dialog box. Below the dialog box, there is a caption: "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

The screenshot shows the 'Edit Organization Partitions' screen. At the top, there is a 'Select Action:' dropdown menu set to 'Edit Organization Partitions'. Below this is the 'Partition Preferences' section. It contains two groups of locations. Each group has a header with a number (1 and 2), up and down arrows, and an 'X' icon. The locations listed are Davis Arts Center, Highland Science Center, BJJ Culinary Building, Bray Hall, and Business Administration Quad. Each location has a checkbox and an 'X' icon to its right. Below the locations are 'Select from Partitions' dropdowns and 'Done' buttons. At the bottom of the partition preferences are a 'New Partition Group' button and a 'Save Partition Preferences' button. Red arrows and text provide instructions: 'Use the arrows to change order of groups.' points to the arrows in group 1; 'The group X removes a partition group.' points to the 'X' in group 1; 'Each item arrow removes a location from a group.' points to the 'X' next to 'Highland Science Center'. A footer note states: '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
