

Bulk Editing Organizations

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



Security Note

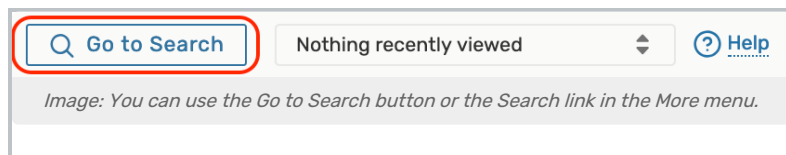
Bulk editing of organizations can be opened up to users who are not in the (-1) administrator group using the [Series25 Group Administration tool permission](#). Administrative Options: 13.0 *Create, Edit and Copy Organizations* and Administrative Options: 25.0 *Override Organization Security*. If you 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](#)

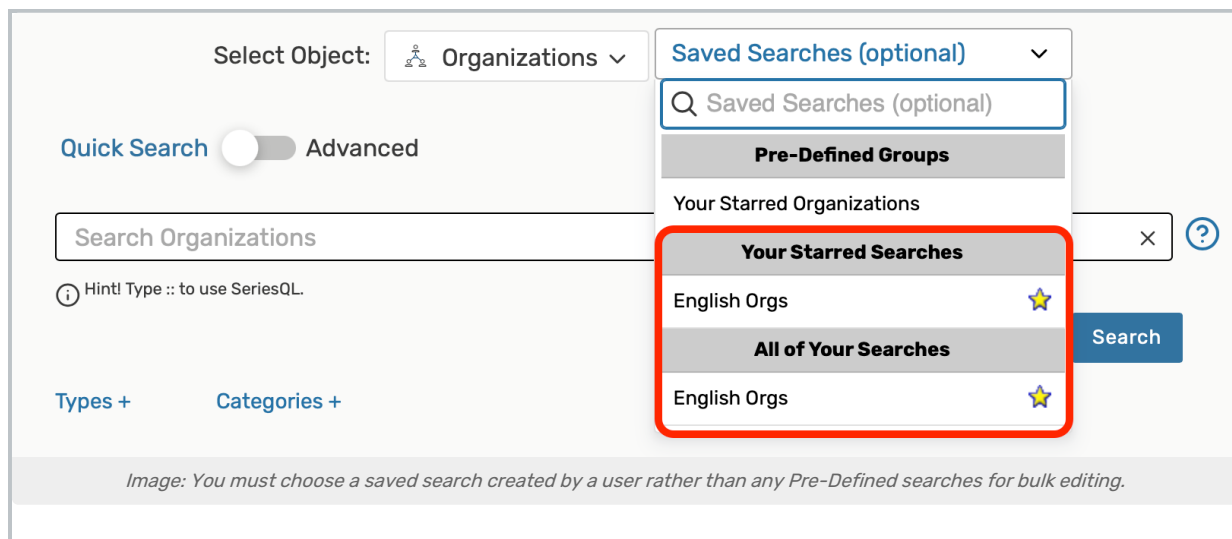
How to Bulk Edit Organizations

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



Be sure the **Organizations** search type is selected, and choose the search you want to use. 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. 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 [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

Select Object:

Organizations

English Orgs

Quick Search

Advanced

English Orgs

Reset

Export Results

Save

Save As

Search

Search Actions

Share

Bulk Edit

Refresh Search Criteria

Delete

Export Results

List

Calendar

Choose Columns

Help

3 Matching Org

	Name	Title	Type	Categories	Accounting Code
☆	ENGL	English (Undergraduate)	Subject Code	College of Performance, Art, and Languages	
★	ENGLISH, DEPT OF	Department of English	Administrative	College of Performance, Art, and Languages	

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



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.

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

<input type="checkbox"/>	Name	Title	Type	Accounting Code
<input type="checkbox"/>	ALTERNATIVE FILM CLUB	Alternative Film Club	Student	
<input checked="" type="checkbox"/>	ESPORTS CLUB	ESports Club	Student	
<input checked="" type="checkbox"/>	GOLF CLUB	Golf Club	Student	
<input checked="" type="checkbox"/>	JUDO CLUB	Judo Club	Student	
<input type="checkbox"/>	STITCH IN TIME	Stitch in Time Knitting Club	Student	
<input type="checkbox"/>	Tabletop Gaming Club	Tabletop Gaming Clue	Student	
<input type="checkbox"/>	Theater Club		Student	

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

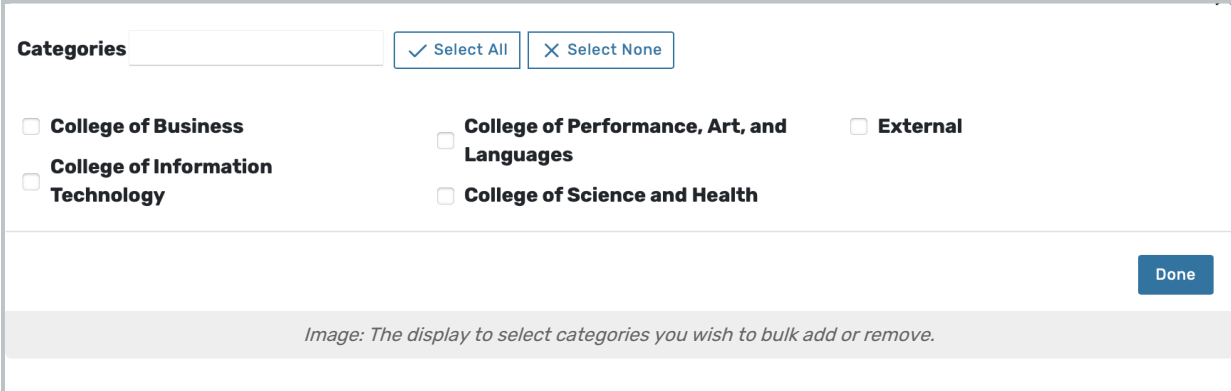
Select **Rating** and use the **Update Rating** button to save.

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" text input field, followed by two buttons: "✓ Select All" and "✗ Select None". Below these are six checkboxes arranged in two columns. The first column contains "College of Business" and "College of Information Technology". The second column contains "College of Performance, Art, and Languages" and "College of Science and Health". A third checkbox labeled "External" is positioned to the right of the second column. At the bottom right of the dialog is a blue "Done" button. Below the dialog box, a grey banner contains the text: "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.

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.

Edit Organization Partitions

The screenshot shows the 'Edit Organization Partitions' interface. 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 set of controls on the left: an upward arrow, a downward arrow, and an 'X' icon. Red arrows point to these controls with the following annotations:

- An arrow pointing to the first group's controls: "Use the arrows to change order of groups."
- An arrow pointing to the second group's controls: "The group X removes a partition group."
- An arrow pointing to an 'X' icon next to a location name: "Each item arrow removes a location from a group."

Each group also has a 'Select from Partitions' dropdown menu with a 'Done' button. Below the groups is a 'New Partition Group' button and a 'Save Partition Preferences' button. At the bottom, a note reads: "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