Bulk Editing Tasks

25Live allows for editing multiple tasks (in bulk) based on saved task searches.
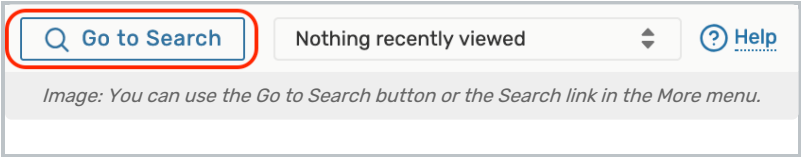
> 🔒 **Security Note**
>
> Bulk editing tasks requires the following permission in Series25 Group Administration tool permissions:
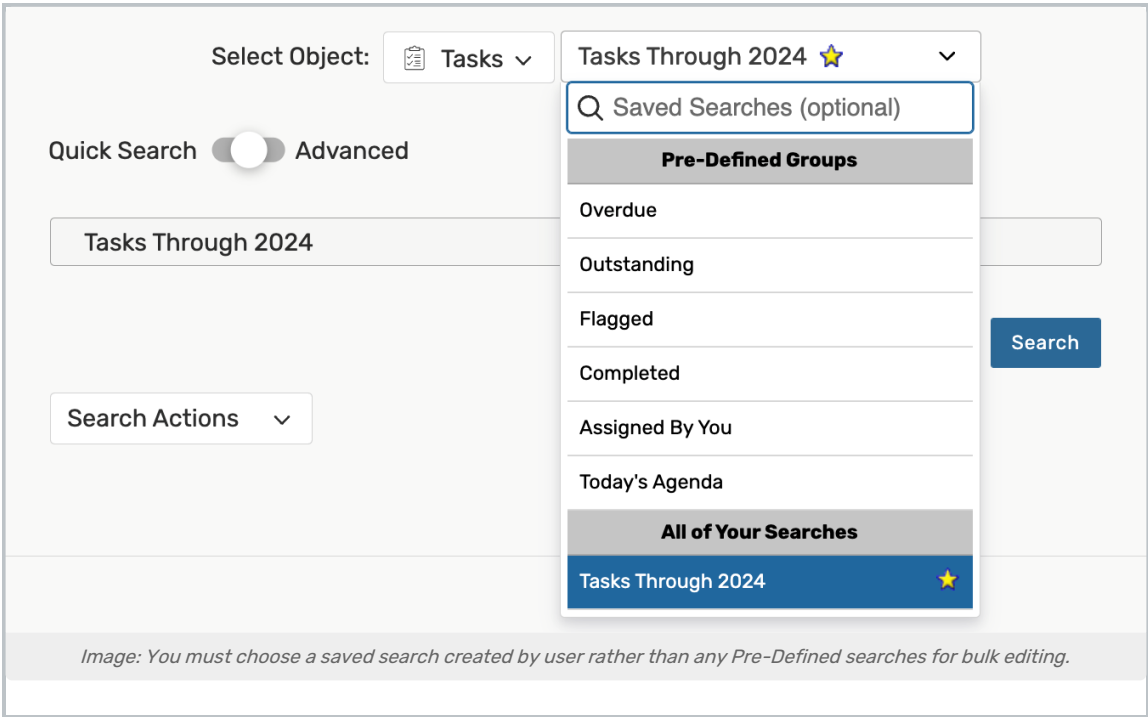> Basic: 8.0 *View Tasks List* = **Yes**.

How to Bulk Edit Tasks

1. Go to the Saved Task Search

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 Task Search

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

Be sure the **Task** 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. Pre-Defined Groups such as **Completed** cannot be selected for bulk editing.

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

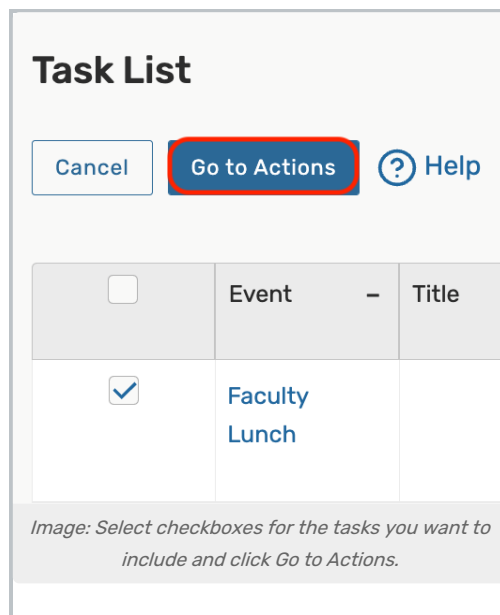Use the **Search** button to run the search if the search doesn't automatically load.

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

Image: After choosing a search, select Bulk Edit from the Search Actions dropdown.
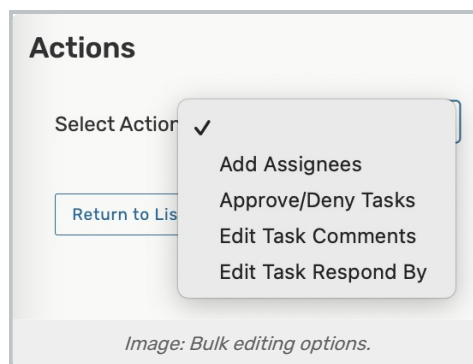
On the search screen, use the **Search Actions** dropdown to select the **Bulk Edit** option.

Task List

Cancel   Go to Actions   ? Help

	Event −	Title
☑	Faculty Lunch	

Image: Select checkboxes for the tasks you want to include and click Go to Actions.

The **Tasks List** screen allows you to check which tasks you want to bulk edit. After selecting, use the **Go to Actions** button to continue.

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.

Actions

Select Action ✓

Return to Lis

Add Assignees
Approve/Deny Tasks
Edit Task Comments
Edit Task Respond By

Image: Bulk editing options.

Add Assignees

- Select the **Add Assignees** button
- Set the toggle search for a **Security Group** or individual **Contacts**
- Select the new groups/contacts and click **Done**
- Click **Update** to save your changes

Approve/Deny Tasks

- Set the toggle to **Approve** OR **Deny**
- Click **Update** to save your changes

> **ⓘ Notes:**
>
> - This edit will **not** skip tasks that have already been Approved/Denied
> - Approve/Deny is not an available action for <u>To Do</u> tasks

Edit Task Comments

- Add a new message in the **Comment** text box
- Click **Update** to save your changes

Edit Task Respond By

- Select the **Date** field
- Use the calendar picker to choose a new **Respond by** date
- Click **Update** to save your changes