

Bulk Editing Tasks

25Live allows for editing multiple tasks (in bulk) based on saved task searches.

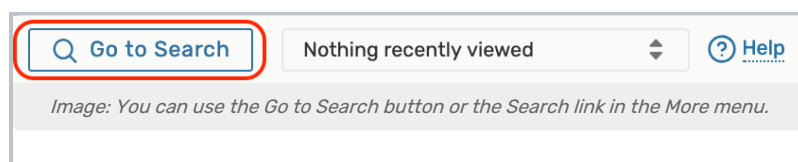


Security Note

Bulk editing tasks requires the following permission in [Series25 Group Administration tool permissions](#):
Basic: 10.0 *View Tasks List* = **Yes**.

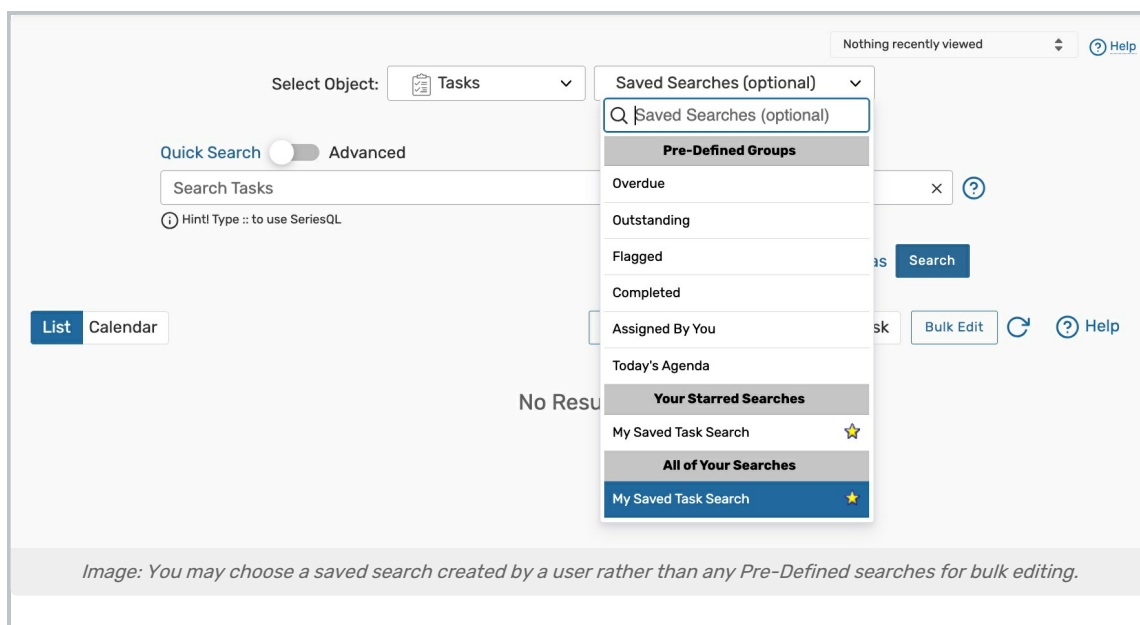
How to Bulk Edit Tasks

1. Go to the Saved Task Search



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 or Perform a Search

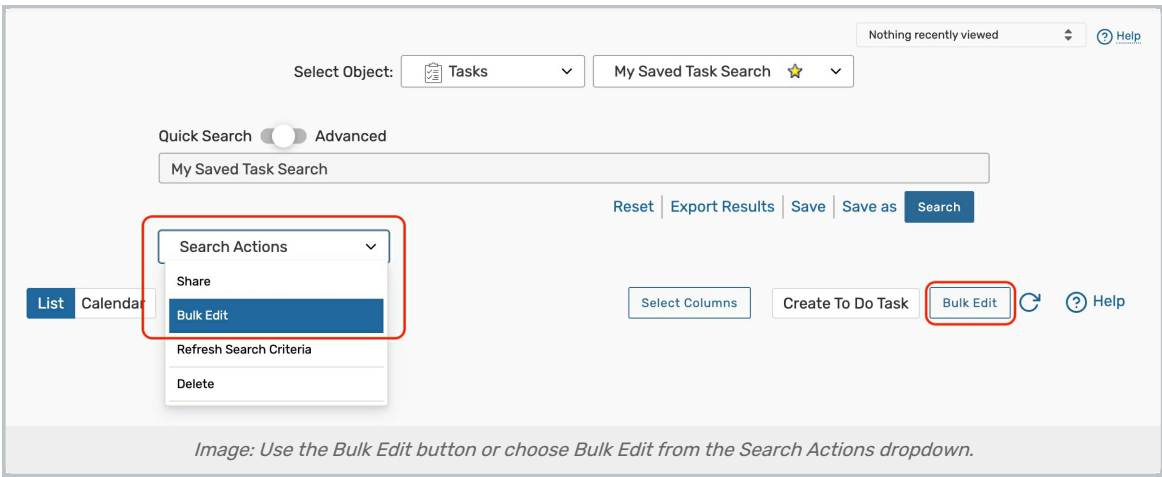


Be sure the **Task** search type is selected, and perform a search or choose the search you want to use from the **Saved Searches** dropdown menu. If selecting a search, you must select a saved search that was created by you or another user, such as those in the **All of Your Searches** section of the list. Pre-defined groups such as **Completed** cannot be selected for bulk editing.

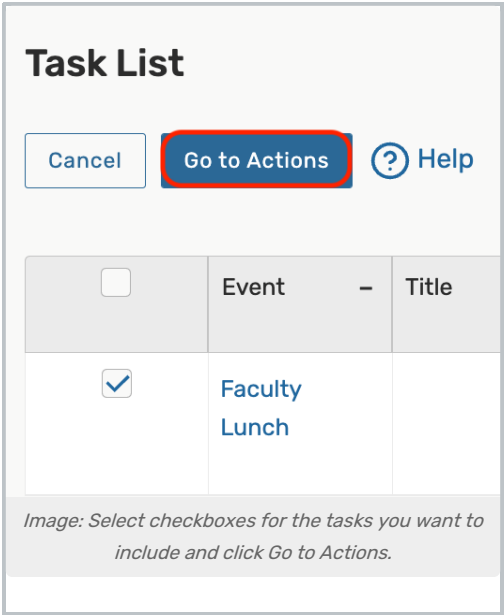
If you don't currently have a saved search available that includes all the tasks you want to bulk edit, you may [perform a new search](#) or [create and save a new saved search](#), then come back to bulk edit those tasks.

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



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.

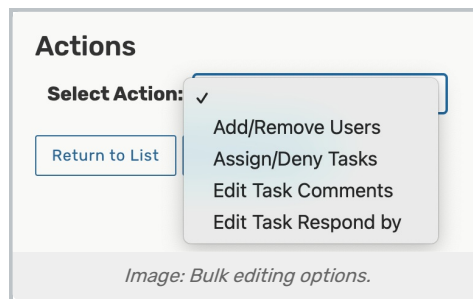


The **Tasks List** screen allows you to check which tasks you want to bulk edit. After selecting, use the **Go to Actions** button to continue.

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.



Add/Remove Users

- Select the **Add Remove Users** button
- Choose between:
 - **Add Users**
 - **Remove Users**
 - **Add Group**
 - **Remove Group**
- Search for a **Security Group** or individual **Contacts** (*depending on your previous selection*)
- 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 [To Do](#) 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

