samegoal

Bulk Actions

Bulk actions

Bulk actions allow users to save time by updating multiple documents at once.

Steps *Update multiple documents at once:*

1. Navigate to a document list page or **Students / create new**
2. Select all items you wish to update. You can select documents individually, or you can use the checkbox in the top left to select all listed documents.
    - If you want to run a bulk action on more than 50 items at a time, you will need to select the option at the top of the screen to **Select all**.
3. Click on the **Actions** or **Share** dropdown, or one of the icons in the top right.
4. Select which action you wish to perform.
    - If your action is being run for more than 50 items, you will receive a notification when the action has completed.

The document actions that can be performed in bulk are:

- **Complete:** If you're not an administrative user, a document must pass all validation checks before it can be completed.
- **Delete**
- **Undelete:** This option becomes available when viewing deleted documents.
- **Star**
- **Unstar**
- **Copy to a new document:** This creates a new document of the same form type for the student and copies over relevant information. A document must be completed in order to copy it to a new document.
- **Update Collaborators**
- **Print:** You can bulk print whole documents or additional views.

- **Share/Present Meeting**

The student actions that can be performed in bulk are:

- **Create Document** Create documents of a single form type for multiple students at once.
- **Change Building**

Tip If you are not an administrative user, you must be the owner of a document in order to complete, share, delete, or undelete it.

Tip You may also bulk create documents and bulk print documents, but the workflow to do so is different than other bulk actions.

Tip Use document list filters to limit the list to just documents you want to update, then use the checkbox in the top left to select all listed documents.

Tip You can also share documents in bulk by selecting the documents you wish to share and clicking **Share > Update Collaborators**.