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
2. Select all documents you wish to update. You can select documents individually, or you can use the checkbox in the top left to select all listed documents.
3. Click on the **Actions** dropdown.
4. Select which action you wish to perform.

The actions that can be performed in bulk are:

- **Incomplete:** This option is only available to administrative users.
- **Complete:** If you're not an administrative user, a document must pass all validation checks before it can be completed.
- **Star:** Add all selected documents to your Caseload.
- **Unstar:** Remove all selected documents from your Caseload.
- **Delete:** In order to view deleted documents, while on a document list page, you must select **Show: Deleted**.
- **Undelete:** This option becomes available when viewing deleted documents.
- **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.

💡 Tip   If you are not an administrative user, you must be the owner of a document in order to 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**.