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**.