

# USER MANUAL – BULK OPERATIONS

TARGET AUDIENCE: ADMINISTRATORS

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Updated August 24, 2023

## Brief explanation of Bulk Operations

### Bulk Edit

Allows administrators to edit courses/rotations by batches.

Administrators can:

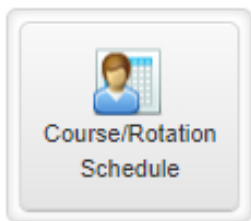
- a) Add data to changes that already exist.
- b) Override all data.
- c) Clear the fields for supervisors and locations.

### Bulk Delete

Allows administrators to delete rotations by batches.

## Bulk Operation Process

To access bulk operations, you must access the Learner Schedule. Click on the menu item called Course/Rotation Schedule. Then click on Learner Schedule.

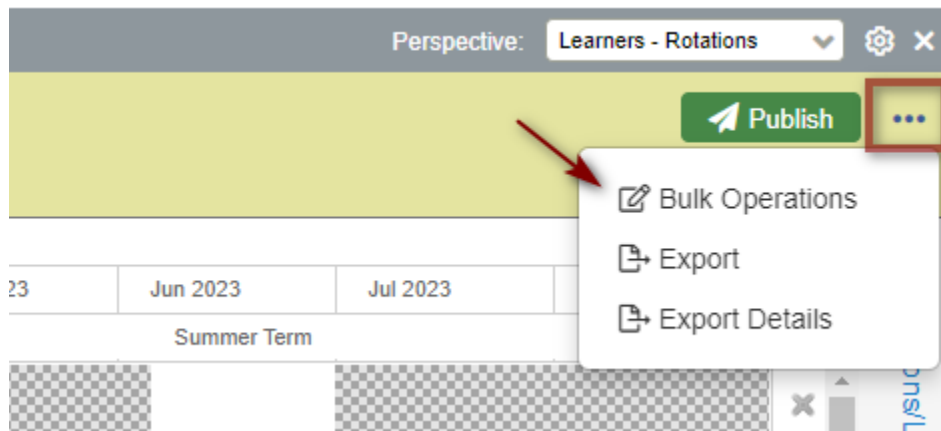


**Step 1:** Use the “Learners” and “Rotations” filters to refine which courses/rotations are appearing in the schedule.

Only those filtered will appear as options for Bulk Operations. If no filter is selected, all courses/rotations in the schedule will appear as options for Bulk Operations.

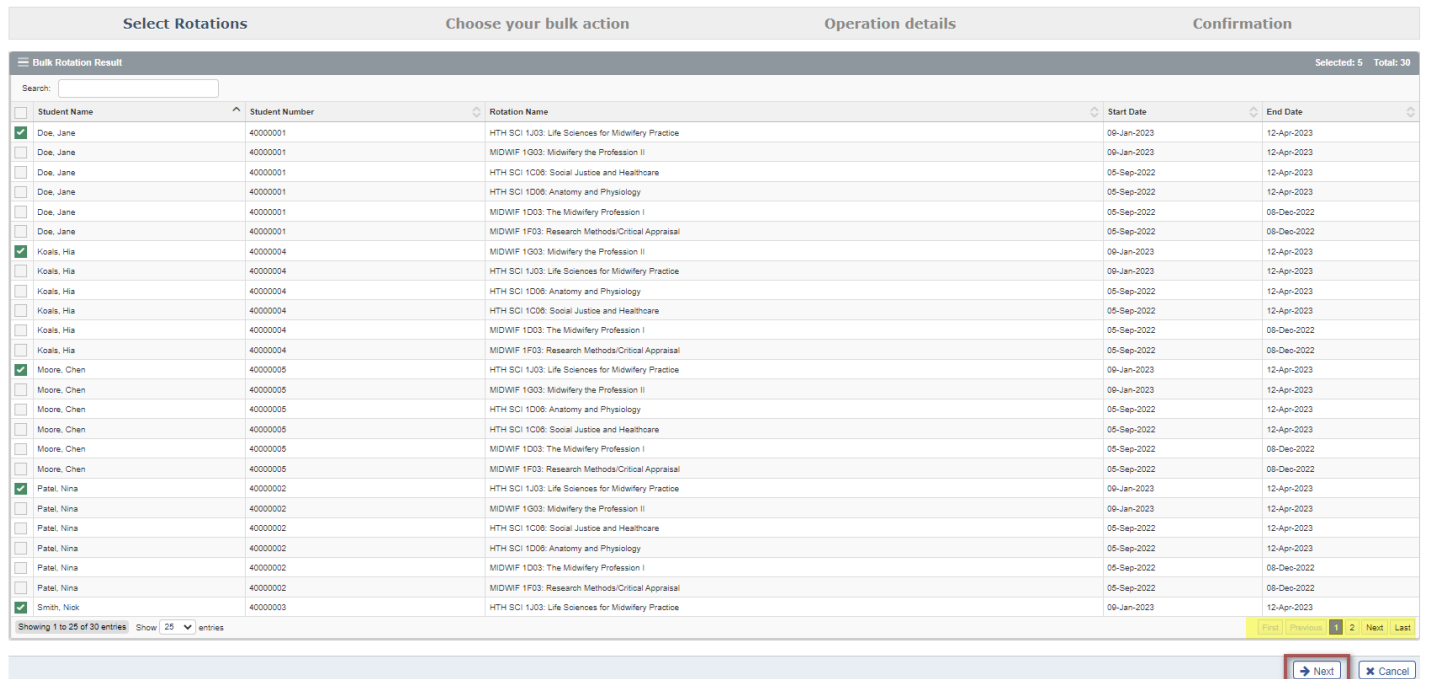


**Step 2:** Click on the 3 dots located on the right-hand side of the yellow filter panel and select “Bulk Operations”.

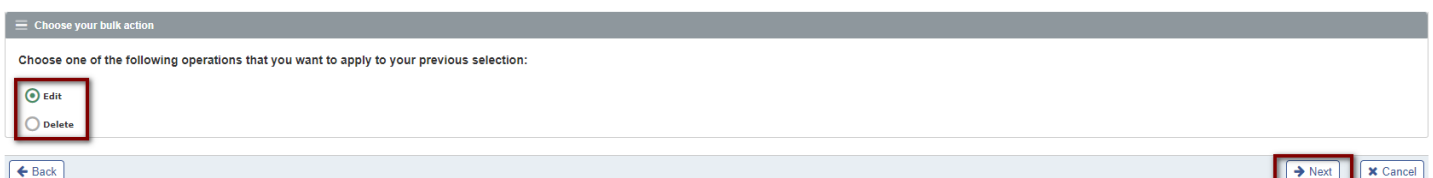


**Step 3:** Select the courses/rotations from the list needing a bulk operation and “next” once done.

If more rotations need to be selected past page 1, use the navigation buttons in the bottom right-hand corner (highlighted yellow in screenshot below).



**Step 4:** Select the bulk operation you want to apply to the selected courses/rotations and then “next” once done. (If using the bulk delete, please skip to step 8).



**Step 5:** If editing, select the bulk action(s) you wish to perform on the selected courses/rotations.

Select Rotations	Choose your bulk action	Operation details
<div style="background-color: #f2f2f2; padding: 5px;"> <span>≡ Operation details</span> </div> <p>Choose the bulk action(s) you wish to perform on the selected (5) courses/rotations:</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p><input checked="" type="checkbox"/> <b>Supervisors</b></p> <p>Option: <span style="border: 1px solid #ccc; padding: 2px;">Add Changes to data that already exists</span></p> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;"> --Select--  Add Changes to data that already exists  Override all data  Clear fields </div> </div> <div style="width: 50%;"> <p>Supervisor</p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 45%;"> <p><input checked="" type="checkbox"/> <b>Locations</b></p> <p>Option: <span style="border: 1px solid #ccc; padding: 2px;">--Select--</span></p> </div> <div style="width: 50%;"> <p>Location</p> <div style="border: 1px solid #ccc; padding: 2px;">--Select--</div> </div> </div>		
<span style="border: 1px solid #ccc; padding: 2px 5px;">← Back</span>		

The Bulk Actions:

Bulk Action	What will occur
<b>Add Changes to data that already exists</b>	This will add another layer of supervisors/locations to the rotations. What exist will remain and the new information will be added.
<b>Override all data</b>	This will wipe all supervisor/location information in that rotation and replace it with the edits.
<b>Clear Fields</b>	Clears all supervisor and location fields.

**Step 6:** If editing, enter in the applicable supervisor and/or location information.

To open the editable fields, click the plus sign in the last column. Please also ensure to select the green checkmark after entering the information.

*Tip: If the location/supervisor being added is not in the drop-down, submit a MedSIS JIRA ticket to have it added.*

≡ Operation details

Choose the bulk action(s) you wish to perform on the selected (3) courses/rotations:

**Supervisors**

Option: Add Changes to data that already exists

Supervisor\*

--Select--

Time Spent %

Categories\*

Format

+

---

**Locations**

Option: --Select--

Location\*

--Select--

Time Spent %

Categories

Primary

+

≡ Operation details

Choose the bulk action(s) you wish to perform on the selected (3) courses/rotations:

**Supervisors**

Option: Add Changes to data that already exists

Supervisor\*

--Select--

Time Spent %

Categories\*

Format

+

Time Spent %

Categories\*

Format

+

100

--Select--

--Select--

✓ ✕

---

**Locations**

Option: --Select--

Location\*

--Select--

Time Spent %

Categories

Primary

+

Operation details

Choose the bulk action(s) you wish to perform on the selected (3) courses/rotations:

**3. Click checkmark after filling in information**

**Supervisors** Option: Add Changes to data that already exists

Supervisor*	Time Spent %	Categories*	Format	
Carl, Steven	100	Contributor	Faculty/Tutor	<input checked="" type="checkbox"/>

**Locations** Option: --Select--

Location*	Time Spent %	Categories	Primary	
				<input type="checkbox"/>

### Step 7: Next

Operation details

Choose the bulk action(s) you wish to perform on the selected (3) courses/rotations:

**Supervisors** Option: Add Changes to data that already exists

Supervisor*	Time Spent %	Categories*	Format	
Carl, Steven	100	Contributor	Faculty/Tutor	<input checked="" type="checkbox"/>

**Locations** Option: --Select--

Location*	Time Spent %	Categories	Primary	
				<input type="checkbox"/>

**Step 8:** If editing or deleting, review the confirmation page to ensure the correct actions will occur. Once reviewed, select “confirmation”.

Select Rotations	Choose your bulk action	Operation details	Confirmation
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Updated fields:

Section Name	Action	Value
Supervisor	Add Changes to data that already exists	Adams, Adam; 100%; Contributor; Faculty/Tutor

The above table summarizes the changes you are about to make to the following 5 rotations:

Student Name	Student Number	Rotation Name	Start Date	End Date
Doe, Jane	40000001	HTH SCI 1J03: Life Sciences for Midwifery Practice	09-Jan-2023	12-Apr-2023
Koals, Hia	40000004	MIDWIF 1G03: Midwifery the Profession II	09-Jan-2023	12-Apr-2023
Moore, Chen	40000005	HTH SCI 1J03: Life Sciences for Midwifery Practice	09-Jan-2023	12-Apr-2023
Patel, Nina	40000002	MIDWIF 1G03: Midwifery the Profession II	09-Jan-2023	12-Apr-2023
Smith, Nick	40000003	MIDWIF 1G03: Midwifery the Profession II	09-Jan-2023	12-Apr-2023

Showing 1 to 5 of 5 entries Show 25 entries

**Step 9:** Review the Summary page and select “ok.”

Summary

5 rotations have been successfully edited

## **QUESTIONS?**

If you have any questions or difficulties with this process, please submit them through our ticketing system.

To submit a ticket, please visit [medsishelp.mcmaster.ca](https://medsishelp.mcmaster.ca)

User Guide: [How to Submit a Ticket](#)