USER MANUAL – BULK OPERATIONS

TARGET AUDIENCE: ADMINISTRATORS

Updated December 18, 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.
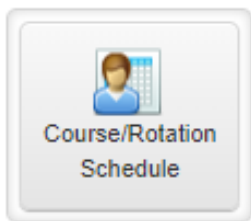

Step 1: Use the "Learners" and "Rotations" filters to refine which courses/rotations are appearing in the schedule.

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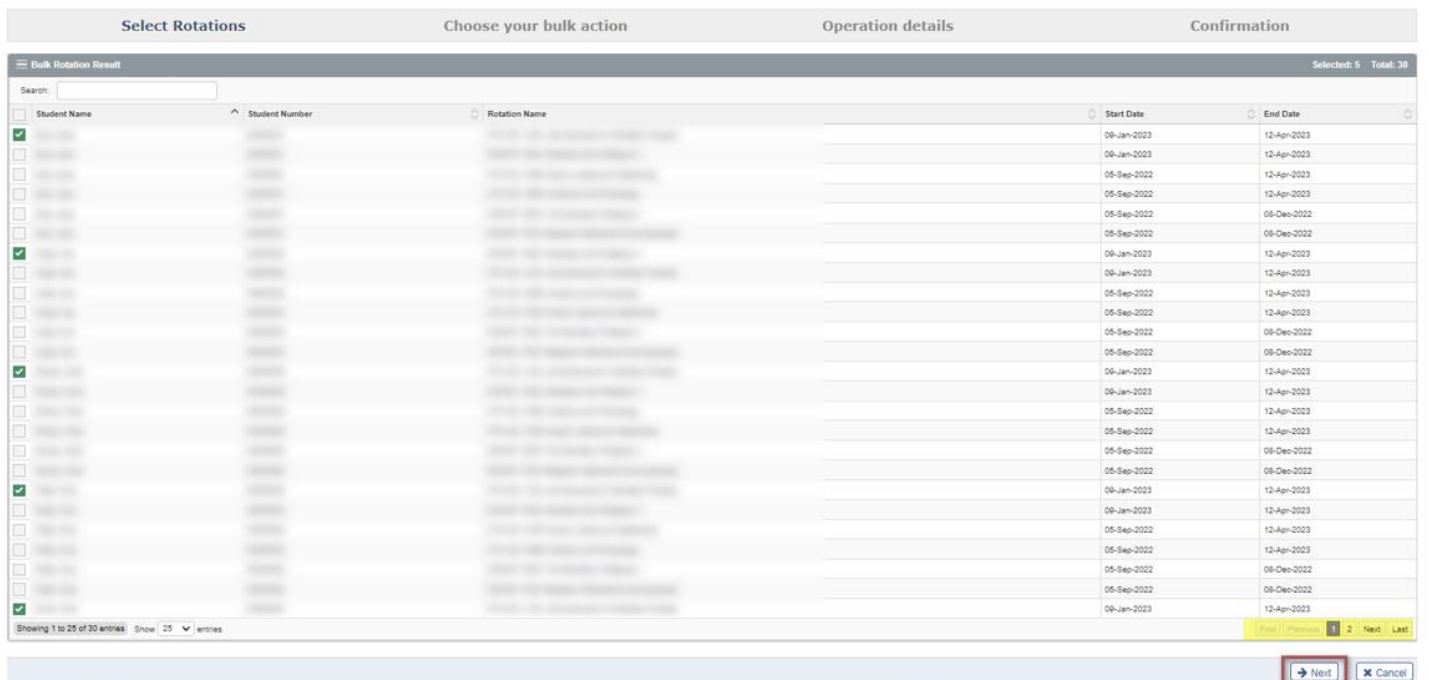
Step 2: Click on the 3 dots located on the right-hand side of the yellow filter panel and select "Bulk Operations".
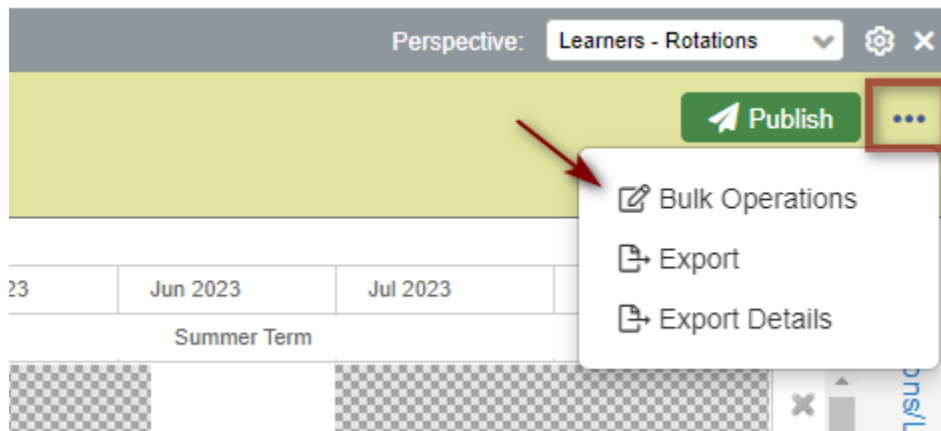

Step 3: Select the rotations from the list needing a bulk operation and "next" once done.

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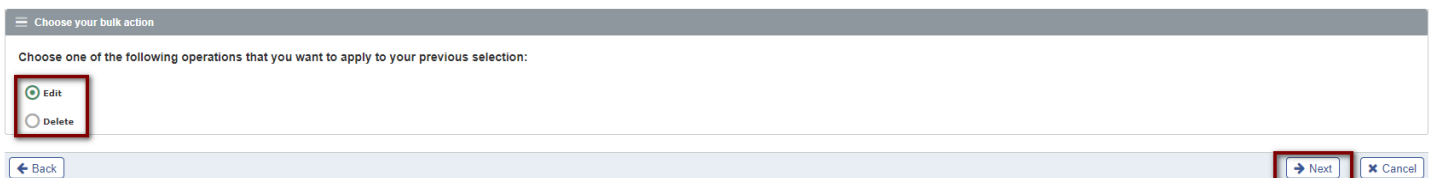
Step 5: If editing, select the bulk action(s) you wish to perform on the selected courses/rotations.

The Bulk Actions:

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

Step 7: Select "Next"

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

Updated fields:

Operation details

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:

Bulk Rotation Result — Total: 5

Student Name	Student Number	Rotation Name	Start Date	End Date
			09-Jan-2023	12-Apr-2023
			09-Jan-2023	12-Apr-2023
			09-Jan-2023	12-Apr-2023
			09-Jan-2023	12-Apr-2023
			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

Some Notes:

- If your auto publish is on, any bulk copy changes made will be published and you cannot roll back the changes.
- You cannot bulk edit/delete expired rotations.
- You can only bulk edit/delete rotations for your own internal learners.

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

User Guide: How to Submit a Ticket