Overview

The Workflow system is set up with a tool that helps users take actions on groups of eDocs at one time. The user will find that this tool is useful in situations where one of the following is needed across any number of applications.

- Bulk Cancelling (i.e. dropping an application from the Workflow process)
- Bulk Acknowledgement (i.e. indicating that you have seen the eDoc)
- Bulk Approval (when there is not a need to view or change the admit decisions or reasons)
  - Approval should not be confused with admitting or denying applications. Approval in Workflow can be understood as passing any number of values and decisions along to the next stop in the flow.

**CAUTION:** This tool should be used with caution, since it can take actions on many documents at once.

This document will assume that only SIS Admissions documents are currently showing in the user’s Action List.

Since at any time there can be eDocs at different stages in the Workflow process, the defaults at the top right of the Action List will vary in contents. The basic idea is that for eDocs on the current page in the Action List, all pertinent possible actions are listed. For example, if all documents showing are at the stage where only acknowledgement is possible, then the list at the top right will only contain an ACKNOWLEDGE action. If there are documents where both ACKNOWLEDGE and APPROVE are possible, then both of these options will be available.

In the case of the above graphic, all of these actions are possible since the documents vary in their progress in the Workflow.

**NOTE:** Approval is only available when admit decisions and reasons have already been specified earlier. For example, if an eDoc comes to a departmental person for approval, it does not have a default admit decision entered, so in this case bulk approval of these cannot happen since there is nothing to approve at this point. This is beneficial further along in the flow. Admissions staff have the ability to simply ‘agree’ with what decisions were entered by the departments.
### Admissions

**Grad eApp – Using Bulk Actions**

## Steps

### Login to One.IU

1. Login to one.iu.edu.
2. In the **Search** box, type, “action list” and press **ENTER**.
3. Click the **Action List (Kuali Rice)** task icon.

### Take Bulk Action on the Documents

1. To take bulk action on the documents on the page, click on the desired action in the drop down list and then click the **apply default** button. When this is done, you will see all drop down values next to the documents that are able to take on this action change value to the one selected. Below is an example of **ACKNOWLEDGE** being selected. Note that the document waiting for approval was not changed.

   ![Example of ACKNOWLEDGE action](image)

   - To ACKNOWLEDGE a document, select **ACKNOWLEDGE** from the drop-down list and click **apply default**.

2. Scroll to the bottom of the list and click **take action**. This will immediately change the eDocs according to the indicated actions.