

## Course Marketing: Make bulk updates to plans

How to make bulk updates to multiple publishing plans

This guide is intended for staff who are responsible for managing/maintaining course marketing information for their Faculty or School.

The following instructions provide guidance on how to make changes across multiple degree profiles and prepare them for publishing.

To make bulk updates to publishing plans:

1. Navigate to **Student Recruiting/Publishing Plans/Process/Bulk Copy**.
2. Click on the **Add a New Value** tab.
3. Enter a **name** for your bulk copy request (e.g. Bulk\_copy\_accounting) in the *Run Control ID* field and click **Add**.



Keep note of the name you gave this request as you can reuse it in the future should you need to make bulk changes again. You can enter this name into the *Run Control ID* field on the 'Find an Existing Value' tab.

4. On the Bulk Copy page, you will need to enter information into the *Academic Organization*, *Academic Career*, *Academic Year From* and *Academic Year To* fields. You can also click on the **magnifying glass** to reveal the list of options.
5. From the *Allow Overwrite* field, select **Yes** or **No** and then click the **Search** button.



The *Allow Overwrite* field determines whether you wish to overwrite any existing draft plans. For example, you or a colleague may have created a new draft already for a specific marketing record and made some changes. If you choose **Yes** in *Allow Overwrite*, the existing draft version will be overwritten and any changes will be lost. If you choose **No**, the current draft version will be retained and a new draft will not be created.

6. A list of Academic Plans that match your search criteria will be displayed. Select the **Academic Plans** you want to copy.



To select all of the Academic Plans, click on the box with a tick mark in it.

7. Click on the **Run** button at the top of the page.
8. On the Process Scheduler Request page, click **OK** to confirm you want to proceed with the bulk copy.
9. From the Bulk Copy page, click on the **Process Monitor** link at the top of the page.
10. The Process Monitor page shows you the status of your request, e.g. Queued, Pending, etc. Click the **Refresh** button at the top of the page until your *Run Status* shows as 'Success'.
11. Navigate to **Student Recruiting/Publishing Plans/Process/Bulk Update**.
12. Click on the **Add a New Value** tab.
13. Enter a **new name** for your bulk update request (e.g. Bulk\_update\_accounting) in the *Run Control ID* field and click **Add**.



Again, this name can be reused for a future bulk update.

14. On the Select Records page, you will need to enter information into the *Academic Organization*, *Academic Career* and *Academic Year* fields. The *Effective Date* field will default to the current date. You can also click on the **magnifying glass** to reveal the list of options.
15. Click the **Search** button.
16. The same list of Academic Plans should be listed. Select the **Academic Plans** you want to update.
17. Select the **Select Fields** tab and then select the **Fields** you want to update.
18. Select the **Edit Fields** tab.
19. Use either a pre-defined block of text (click on the **magnifying glass** to access these options) or the HTML editor (click on the **notepad** icon) to enter information into the fields you want to update. The new text that you enter or select will overwrite the existing content for the selected publishing plans.
20. Follow steps 7-10 again.
21. Navigate to **Student Recruiting/Publishing Plans/Process/Bulk Status Change**.
22. Click on the **Add a New Value** tab.

23. Enter a **new name** for your bulk status change request (e.g. Bulk\_status\_accounting) in the *Run Control ID* field and click **Add**.
24. On the Bulk Status Change page, you will need to enter information into the *Academic Organization*, *Academic Career* and *Academic Year* fields. You can also click on the **magnifying glass** to reveal the list of options.
25. Click the **Search** button.
26. The same list of Academic Plans should be listed. Select the **Academic Plans** you want to update.
27. In the *Status To* field, select **Approved**.
28. Follow steps 7-10 again.
29. The bulk updates will now need to be published (see [Publish bulk updates](#)).