Setting Bulk Tasks and Statuses

Setting Standard statuses in bulk within an assessment can be a huge time saver. This article will show you how to set a group of standard statuses all at the same time.
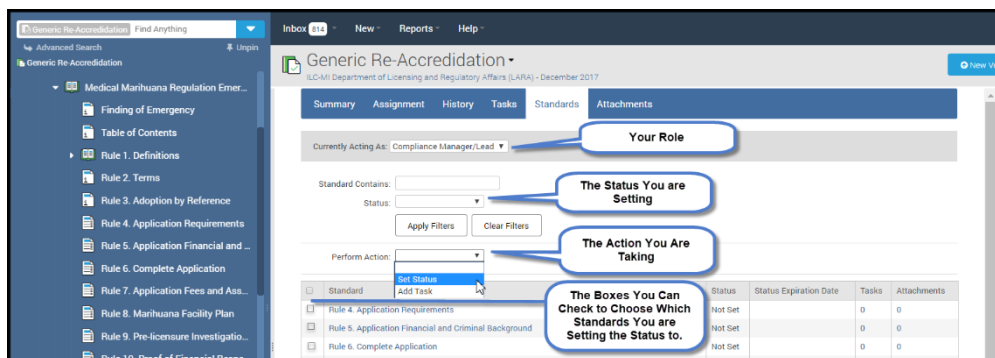
SUMMARY
Briefly describe the article. The summary is used in search results to help users find relevant articles. You can improve the accuracy of search results by including phrases that your customers use to describe this issue or topic.

Setting Standard statuses in bulk within an assessment can be a huge time saver. This article will show you how to set a group of standard statuses all at the same time.

CONTENT
To set assessment tasks or statuses in bulk, navigate to the manual title or specific chapter of the manual from the table of contents on the left of your screen. Then click the **Standards** tab.

As you can see in the example below, the root of the manual is selected and therefore, we can check off any standards within the manual.
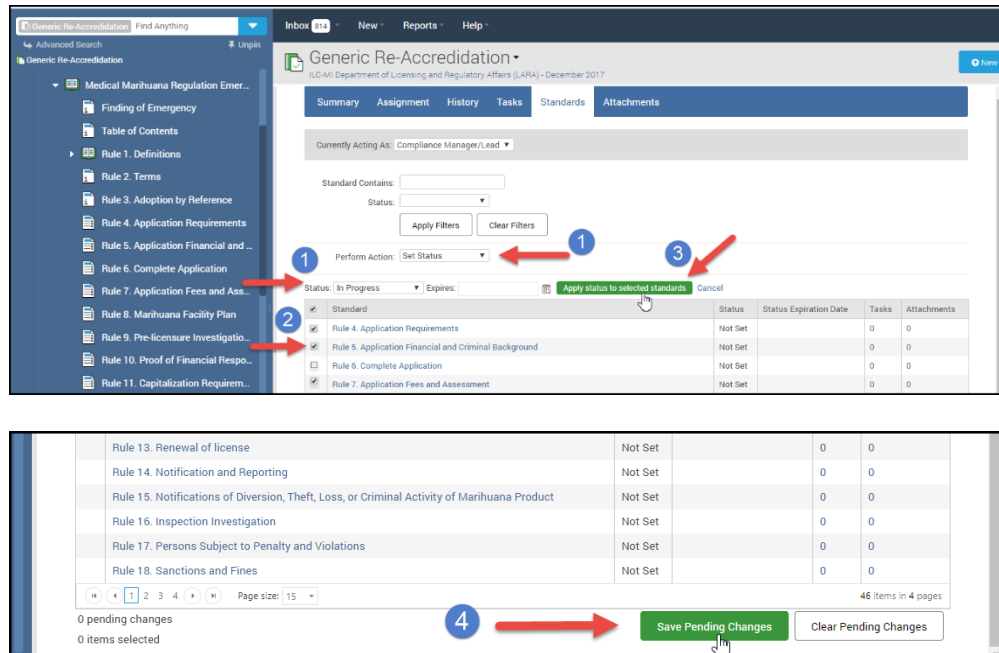

Getting Started

1. Verify you are participating under the appropriate role. **Note:** For the check boxes to be clickable in order to set a status, you must be assigned to **Participate** in the selected role (in this case as Compliance Manager).
2. Check off all the standards to which you wish to set the same status.
3. Using the **Perform Action** drop-down menu, choose whether you would like to **Set Status** or **Add Task** (See below for further instructions).

Setting Statuses to Multiple Standards

1. Once you select **Set Status** from the drop-down menu, use the drop-down to select the appropriate **Status.** You can also set an expiration date here if you choose.
2. Check off the Standards for which you'd like to set the Status.
3. Select **Apply Status to Selected Standards.**
4. Scroll down and select Save Pending Changes.

Adding Tasks to Multiple Standards

1. Once you select Add Task from the drop-down, enter the task in the Description box, and the task due date in the Date box.
2. Check off the Standards you'd like to add the task to.
3. Click Add Task to Selected Standards.
4. Scroll down and select Save Pending Changes.