

Admin Tips & Tricks: Bulk Tools

Customer Success Events 2021

Welcome

Welcome to our Customer Success events – these are all about effective practice and Tips & Tricks with Brightspace tools.

Are you looking for training? Check out our guided training webinars – in the community click on the traveling moose



[Access Brightspace Guided Training](#)

Customer Success Events 2021

Find information on the customer events offered by the Customer Success team in 2021.

🕒 Mar 17, 2021 • Knowledge

Attachment

Details



Customer Success Events - 2021

Based on feedback from customers, the Customer Success team has refreshed our approach to delivering events for 2021.

We're developing a full calendar of events to provide targeted information to administrators, instructors, and others involved in the management of Brightspace. There will be several sessions offered each month on a variety of topics throughout the upcoming year to ensure that you have access to the information your organization needs to be successful with Brightspace.

Select the following links to access a calendar of events specific to your interests:



[Administrators \(ASCs\)](#)



[Instructors & Content Creators](#)


CD Release Notes Highlights - Quarterly Review

Quarterly recurring 30-minute webinar for a review of the highlights from the last three months' CD Release Notes to ensure you're aware of new product changes and feature

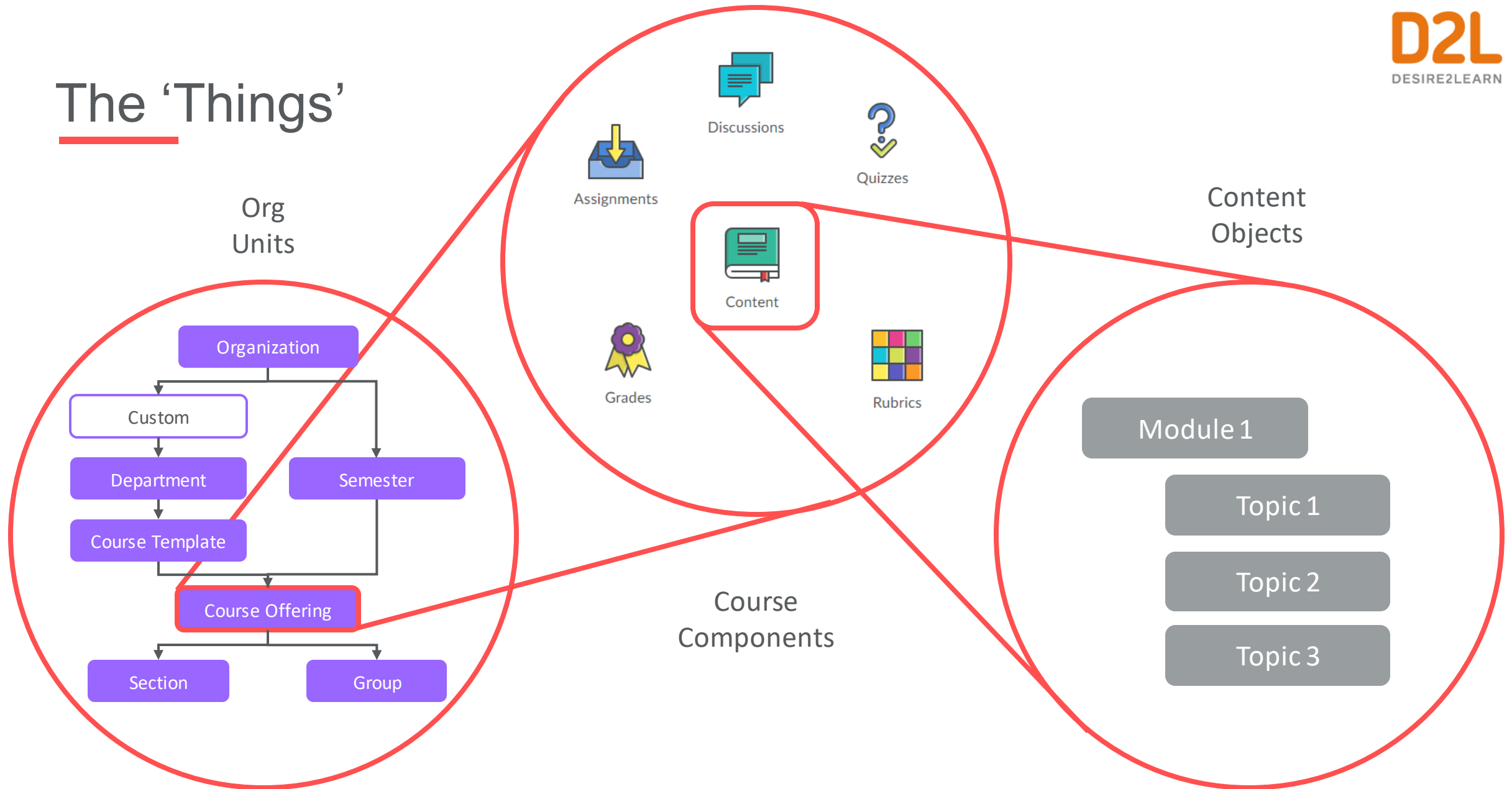
Tool Specific Tips and Tricks - Monthly

We will continue to deliver our Tips and Tricks series covering some best practices and innovative ways to use some of the most loved Brightspace tools.

Agenda

1. Why Bulk Tools?
2. Bulk Tools Overview
3. Tips & Tricks 
4. Case Study
5. Resources
6. Q/A

The 'Things'



Properties

Identifiers (Name, Code)

Dates (Start, End, Due)

Status (Inactive, Active)

Relationships (org structure, enrollment)

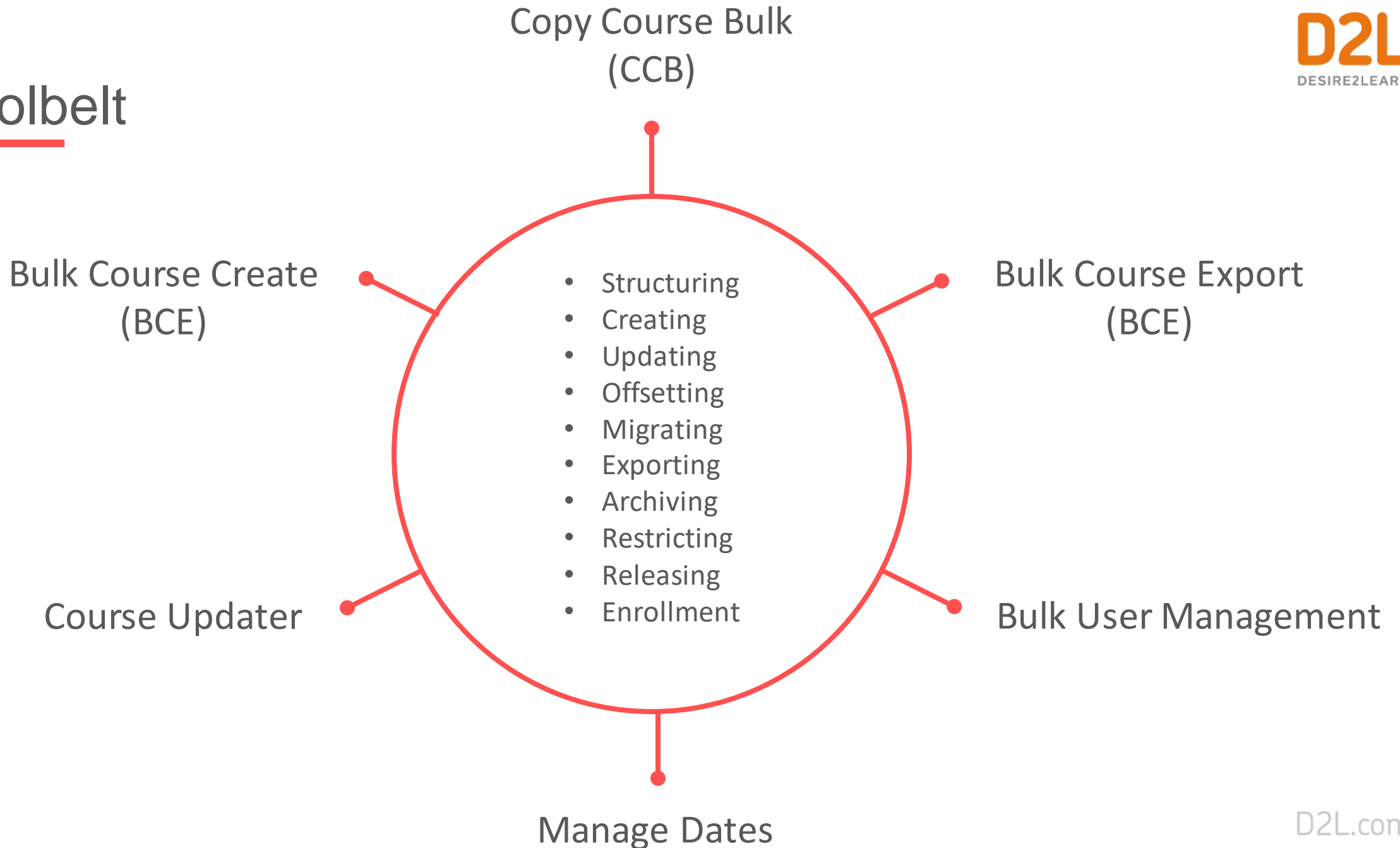
“things”

“First, I want to **inactivate** any **course** with an end date prior to Jan 01, 2021.

I also want to create and copy new **course** shells for **compliance courses only**, and offset **course** and **activity** dates by **365 days**. I want to exclude any **discussion topics**, however. Furthermore, I want to exclude **course code** CP9 from the list.

I then want to **enroll** any **active user** related to **division X** into the 2022 compliance **courses**, and delete any **user** that has been **inactive** for more than five years.”

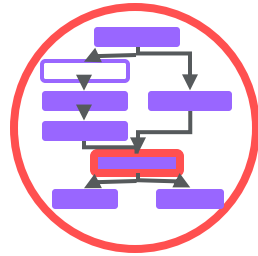
Toolbelt



Do it in Bulk

The properties of a user, org unit, or its related components and activities shape the user experience. Various Bulk tools allow you to create, delete, update, or migrate at scale.

Doing such actions using a tool with bulk capabilities can help **mitigate user error, increase efficiency, and promote consistency**, in turn contributing to a **better user experience**.



- at the beginning of end of a course cycle (i.e. activate all courses, inactivate all courses)
- changes to a live course
- troubleshooting / adjusting bad values

- **Updating** properties of **multiple courses**, where change applies to all users
- helpful in environments where course information is not governed by another mechanism or system
- good for updating course dates and active stats to a common value based on qualifying criteria (i.e. all courses of department X, with start date in the past)

- Navbar link only (typically organization homepage)

1. Organization Tools > Course Updater
2. Permission > See Course Updater
3. Add tool link to Navbar
4. Access Tool
5. Search and/or filter your courses
6. Configure properties to update (start date, end date, active status, days offset)
7. Select targeted course
8. Update

Do not run the update while courses are being created, whether manually or using BCC, SIS or otherwise

Search

- target courses by searching for values found in course name or code

Filter

- apply additional filtering to narrow down your shortlist

Define

- configure the logic, settings, and values you wish to apply in the update

Target

- select which courses to apply the changes against

D2L Support

Awards
Quick Eval
Manager Resources
Discover
Data
Course Updater
Course Admin

Course Updater

pdc
X

Show Advanced Filters

Settings to Apply

Course Start
☐ Update Course Start
☐ Update By Date
☐ Update By Offset

Course End
☐ Update Course End
☐ Update By Date
☐ Update By Offset

Active
☐ Update Active

Active

Update Selected

Update All

3 items in the list.

<input type="checkbox"/>	Course Name	Course Code	Semester	Department	Course Start	Course End	Active
<input type="checkbox"/>	PDCourse1	PDC1	PD Semester	PDDepartment	Jan 3, 2022 7:00 PM	Jan 23, 2022 7:00 PM	✓
<input type="checkbox"/>	PDCourse2	PDC2	PD Semester	PDDepartment	Jan 3, 2022 7:00 PM	Jan 23, 2022 7:00 PM	✓
<input type="checkbox"/>	PDCourse3	PDC3	PD Semester	PDDepartment	Jan 3, 2022 7:00 PM	Jan 23, 2022 7:00 PM	✓

Manage Dates



When

- after importing new courses
- while updating master courses
- Troubleshooting

Why

- **Updating** properties of **multiple course objects**
- Used to view, bulk edit, and bulk offset the date availability and set the calendar status of course objects of the following types:
 - Content modules and topics
 - Discussion topics and forums
 - Assignment submission folders
 - Grade categories and items
 - Announcement items
 - Quizzes
 - Checklists
 - Surveys

Where

- Course Administration Tools

How

1. Organization Tools > Manage Dates
2. Permission > See Manage Dates
3. Access Tool (Course > Course Admin > Manage Dates)
4. Filter you objects and select targeted objects
5. Choose Bulk Edit Dates or Bulk Offset Dates and fill out respective form



If you want to setup a link for Manage Dates in your navbar, create a custom link and point it's path to this:

/d2l/lms/manageDates/date_manager.d2l?fromCMC=1&ou={OrgUnitId}

brightspace PDCourse1

Content Communication Assessments Data Hub **Course Admin**

Course Administration

Category Name

Site Setup

- Completion Tracking
- Navigation & Themes
- Course Offering Information
- Widgets
- Homepages

Site Resources

- Book Management
- Course Builder
- Forms
- Glossary
- Links
- Calendar
- Course Design Accelerator
- Frequently Asked Questions
- Import / Export / Copy Components
- Manage Dates
- Content
- External Learning Tools
- Game Based Learning
- Instructional Design Wizard
- Learning Activity Library
- Manage Files

Manage Dates

Course Duration

Course Start: Jan 3, 2022 7:00 PM Course End: Jan 23, 2022 7:00 PM

Duration: 2 week(s) and 6 day(s)

Filter by Tool

☐ All

☒ Specific Tools

☐ Assignments

☐ Calendar

☐ Checklist

☒ Content

☐ Discussions

☐ Grades

☐ News

☐ Quizzes

☐ Survey

► Show Advanced Filter Options

Apply Filter

☐

Bulk Edit Dates

Bulk Offset Dates

	Type	Name ▲	Due Date	Availability				Other Dates	Visibility Status
				Start Date	End Date	Days	Calendar		
<input type="checkbox"/>	Content Module	Week 1 - PDC1 ▼	-	1/3/2022 12:00 AM ×	1/9/2022 11:59 PM ×	7	<input checked="" type="checkbox"/>		Visible if conditions met
<input type="checkbox"/>	Content Topic	Week 1 - Topic 1 ▼	-	1/3/2022 4:00 PM ×	1/5/2022 4:00 PM ×	2	<input checked="" type="checkbox"/>		Visible if conditions met
<input type="checkbox"/>	Content Topic	Week 1 - Topic 2 ▼	-	1/5/2022 4:00 PM	1/7/2022 4:00 PM	2	<input checked="" type="checkbox"/>		Visible if

Filter

- narrow down your shortlist of objects to target

Define

- configure the logic, settings, and values you wish to apply in the update

Target

- select which object to apply the changes against

Bulk User Management



When

- May be tied into client-side registration processes for the purpose of creating users and enrolling users into their courses.
- Typically used after course development is complete to enroll users into a course
- Commonly used during time of rollover or semester start
- Troubleshooting

Why

- **creating / updating** properties or enrollments of **multiple users**
- Used to speed up user management process, including creating, deleting, update users, as well as enrollment or unenrolling users into course
- Provides validation and helps to catch or measure errors or upstream process gaps
- Equity of access (or lack there of) across user base

Where

- UI interface (Users tool)

How

1. Configure Permissions (multiple)
1. Access Tool
2. Select Bulk User Management Tab
3. Create BUM Request File
4. Upload BUM Request File



If you plan to use BUM to enroll users into groups, consider turning on `d2l.Tools.Groups.IncludeOrgUnitIdInGroupCode`, which will include the Org Unit ID in the group code to keep these codes unique.

Bulk User Management

Available Actions:

CREATE	<p>This action is used to create a new user. If the user already exists, no action will be performed. Fields indicated with a dagger (†) will result in updates to Contact Information in both the User Profile and User Management. The format of this action is as follows:</p> <p>CREATE, *Username, Org Defined ID, *First Name, Preferred First Name, *Last Name, Preferred Last Name, Password, *Role Name, Is Active, *Email</p>
UPDATE	<p>This action is used to update information for an existing user. Fields indicated with a dagger (†) will result in updates to Contact Information in both the User Profile and User Management. The format of this action is as follows:</p> <p>UPDATE, *Username, Org Defined ID, First Name, Last Name, Password, Is Active, Email</p>
DELETE	<p>This action is used to delete an existing user. The format of this action is as follows:</p> <p>DELETE, *Username, Org Defined ID</p>
ENROLL	<p>This action is used to enroll an existing user in a specified org unit. The format of this action is as follows:</p> <p>ENROLL, *Username, Org Defined ID, *Role Name, *Org Unit Code</p>
UNENROLL	<p>This action is used to unenroll an existing user from a specified org unit. The format of this action is as follows:</p> <p>UNENROLL, *Username, Org Defined ID, *Org Unit Code</p>
IMPORT	<p>This action is used to create a new user and enroll the user in a specified Org Unit. Fields indicated with a dagger (†) will result in updates to Contact Information in both the User Profile and User Management. The format of this action is as follows:</p> <p>IMPORT, Username, Org Defined ID, *First Name, *Last Name, Password, *Role Name, Is Active, *Email, *Org Unit Code</p>

brightspace[™] by D2L

Awards Quizzes

User Related
Notifications
Profile Cards
User Attributes
Users

Locale Management
Locations
Login Page Management
Mail Management
Manage Extensibility

Grade Schemes
Learning Activity Library
Rubrics
View Copy Course History

Product/Tool Administration
Bulk Tool Configuration
View Product Versions
D2L Administration

Users User Collections **Bulk User Management**

Click Browse to select a comma separated file (CSV) in ASCII text format. Fields must be included in a specific order for each action. [View instructions.](#)

Upload File *

Choose File No file chosen

Next

Always use **View Instructions** as a source of truth for this process.

This page responds to changes made in the **Bulk User** form elements, configured in the **Form Elements** tool.

Each form element has properties that allow you to control whether a property is parsed and/or required for each of the respective commands – this can vary from environment to environment.

Copy Course Bulk (CCB)

When

- preparing for a new semester or calendar year (Rollover)
- building out new offerings
- updating existing courses with new components or objects
- troubleshooting

Why

- **copying components** between **multiple courses** within same learning environment
- saves time when completing similar actions across multiple org units

Where

- UI interface (organization / manage files)
- FTP possible is setup

How

1. Enable Tool (Organization Tools > Bulk Course Copy)
2. Configure Permissions (Bulk Course Copy > Manage Settings)
3. Configure Tool (Admin Tools > Bulk Tool Configuration)
4. Prepare CSV request file
5. Upload CSV request file to designated inbox location and wait for runtime (overnight)*

* jobs can be triggered real-time upon request via support case to D2L Support (D2L Support Only)



CCB Copy logic is **additive**. If you make multiple copies into the same course, you will end up with multiple iterations of the same content objects. Furthermore, matching filenames are not overwritten – for the latter, use BCC.

Copy Course Bulk (CCB)

Does

- copy components between courses within same learning environment

Can (Optional)

- create new course shells
- offset dates & times

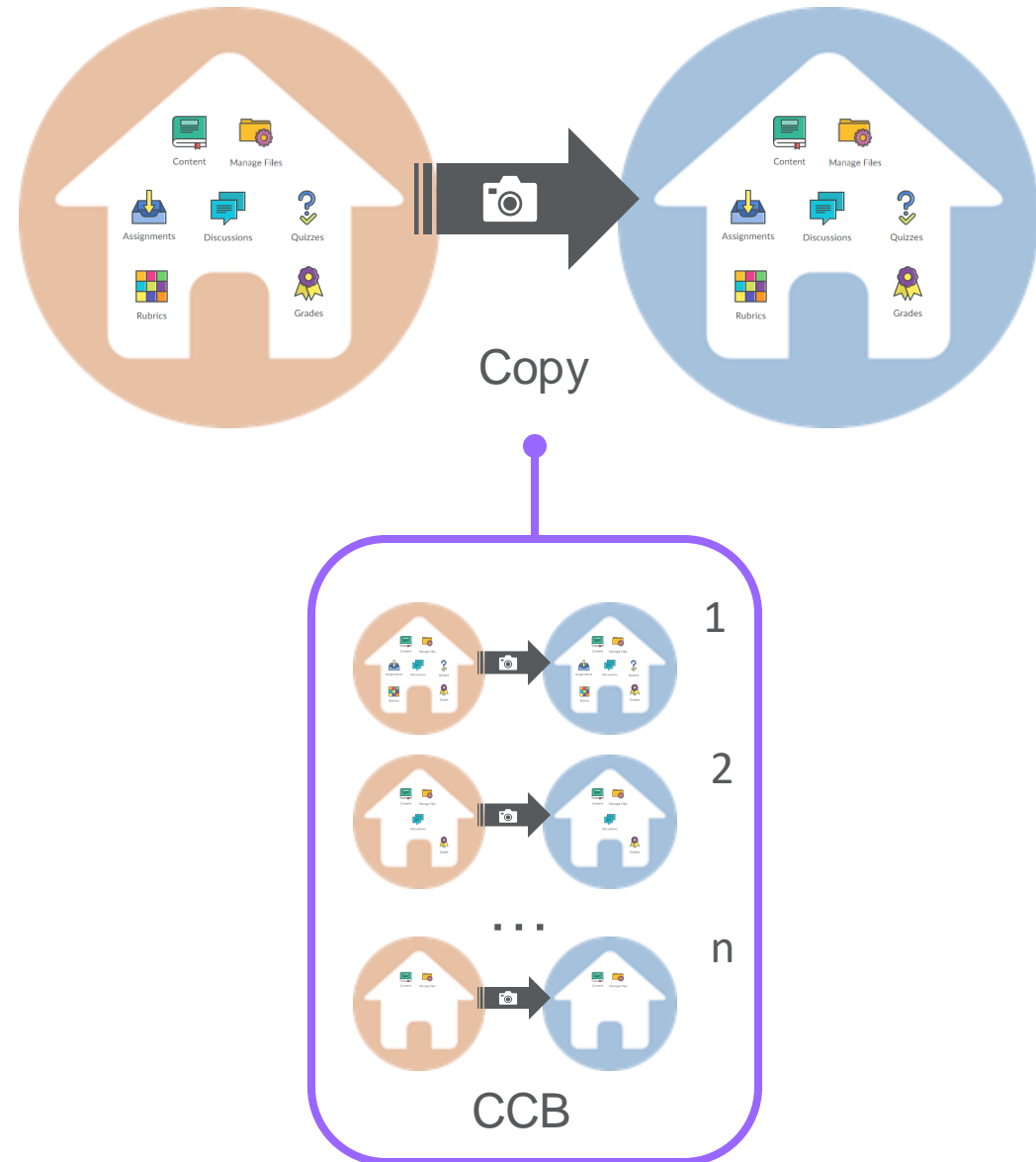
Cannot

- handle course packages to move components
- facilitate moving components into different environments



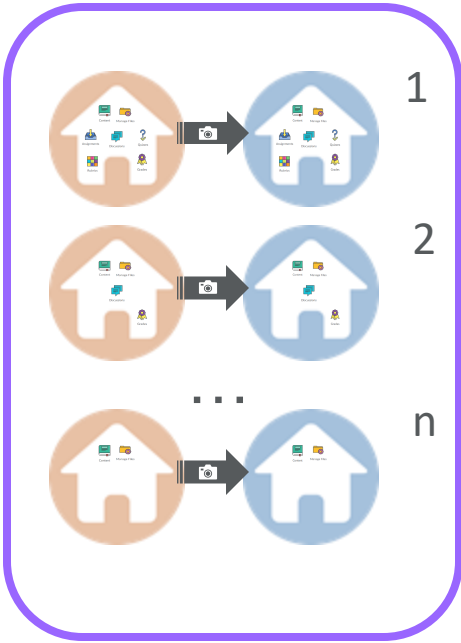
Batch your requests in separate CSVs if

- You have large copy requests (i.e. 100+ copies)
- You have different criteria for which components should be copied in the copy job



Copy Course Bulk (CCB)

★ Source Course (ID)	★ Destination Course (Name)	★ Destination Course (Code)	★ Course Template (Code)	Semester (Code)	Day Offset	Hour Offset
7001	Onboarding 2021	ON21	ONTemp21		90	
7002	Safety 2021	SF21	SFTemp21	2021		2
7003	Policy 2021	PL21	PLTemp21			6



★ required parameters

Check the **View Copy Course History** link in Admin tools to validate the status of your copy jobs after they've been queued through the CSV request process

Bulk Course Export (BCE)

When

- migrating courses between environments
- decommissioning site
- regular Maintenance (backing up old courses before purge)
- responding to Ad-Hoc requests (course creator requests past course)
- troubleshooting

Why

- **Creating course packages for multiple courses**
- allows you to get courses / content out of Brightspace
- allows you to preserve old courses
- offline process (gets around timeouts)
- saves time when completing similar actions across multiple org units

Where

- UI interface (organization / manage files)
- FTP possible is setup

How

1. Enable Tool (Organization Tools > Bulk Course Export)
2. Configure Permissions (Bulk Course Export > Manage Settings)
3. Configure Tool (Admin Tools > Bulk Tool Configuration)
4. Prepare CSV request file
5. Upload CSV request file to designated inbox location and wait for runtime (overnight)*

* jobs can be triggered real-time upon request via support case to D2L Support (D2L Support Only)



If you are exporting **large** course – courses that may fail to download – work with D2L Support to setup FTP logic so that packages can be retrieved from that location

Bulk Course Export (BCE)

Does

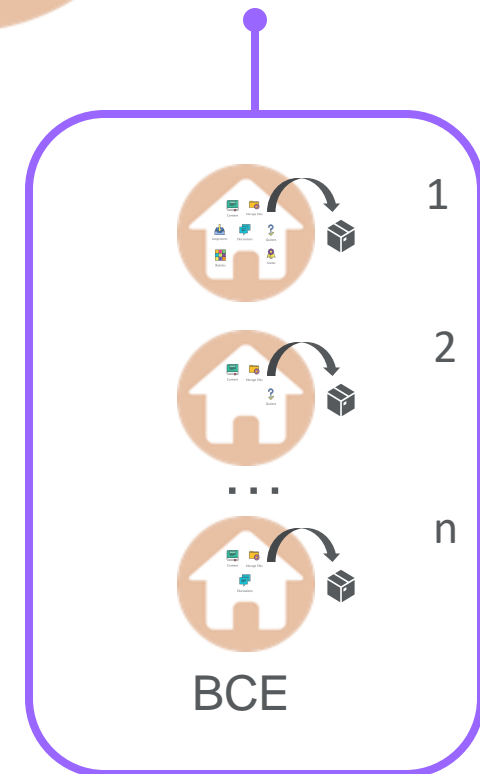
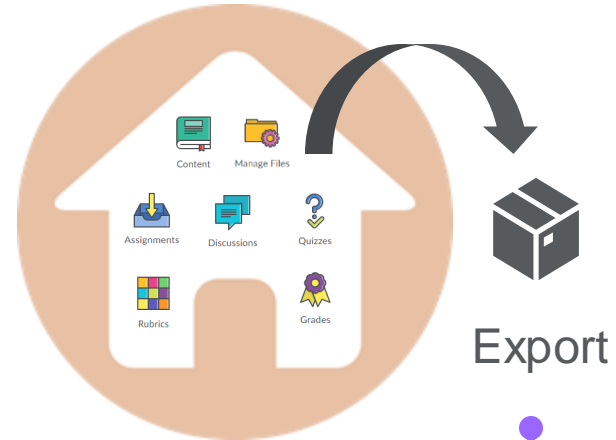
- export course packages (Brightspace or Common Cartridge)

Can (optional)

- facilitate moving components into different environments

Cannot

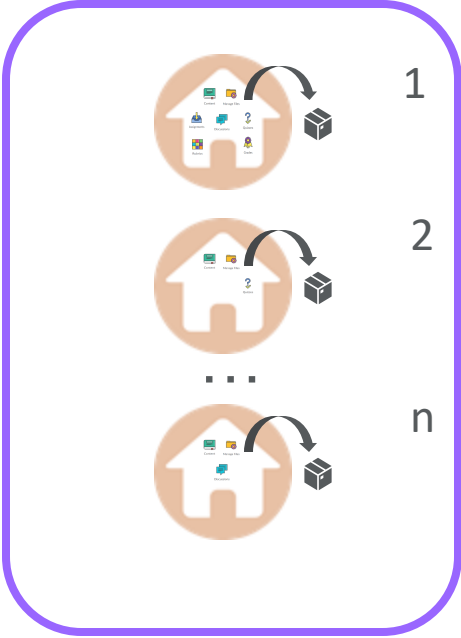
- create courses
- copy components between courses



Consider your organization's data retention policy and establish a process for using BCE to archive old courses. Used in conjunction with other tools like Data Purge, this can be an effective way to keep your storage footprint under control and keep your org structure lean.

Bulk Course Export (BCE)

★ Source Course (ID)	★ Source Course (Code)	Source Course (Name)	Export Package Type (null or 0=BS, 1=CC)
8001	BF21	Benefits 2021	
8002	SC21		0
8003	DV21	Diversity 2021	1



Consider creating a template file that reflects your organization's use of the tool so that it can be referenced when creating request files

★ required parameters

Bulk Course Create (BCC)

When

- launching a new program
- providing empty course shells for course creators
- preparing for a new semester or calendar year (Rollover)
- troubleshooting

Why

- **creating** and/or **importing multiple courses**
- ingests courses that may not already exist within the learning environment
- capable of creating empty course shells
- offline process (gets around timeouts)
- saves time when completing similar actions across multiple org units

Where

- UI interface (organization file, manage files)
- FTP possible is setup

How

1. Enable Tool (Organization Tools > Bulk Course Create)
2. Configure Permissions (Bulk Course Create > Manage Settings)
3. Configure Tool (Admin Tools > Bulk Tool Configuration)
4. Prepare CSV request file
5. Upload CSV request file and course packages to designated inbox and course package location, and wait for runtime (overnight)*

* jobs can be triggered real-time upon request via support case to D2L Support (D2L Support Only)



Check logs and spot check course to ensure things went along as expected. If you made a mistake, consider what other bulk tools might be available to help you correct course

Bulk Course Create (BCC)

Does

- Imports and/or creates new course shells

Can (optional)

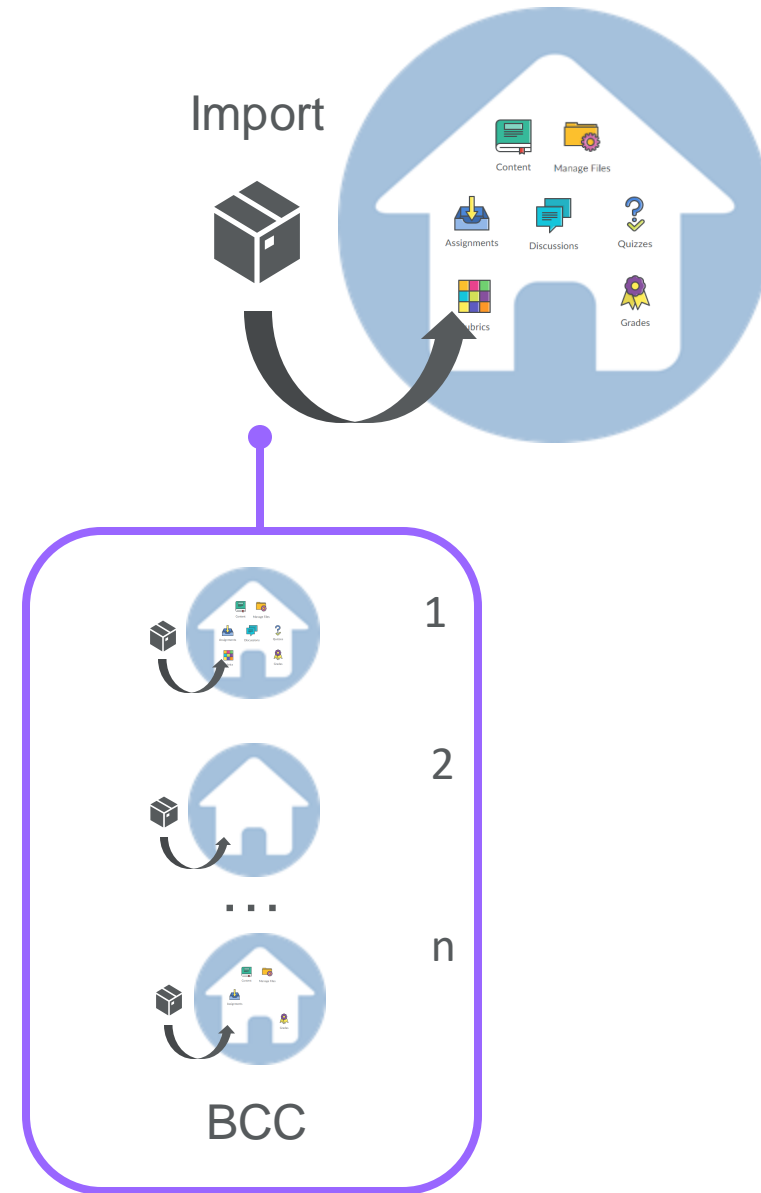
- handles course packages to move components
- Facilitate moving components into different environments

Cannot

- Move components without handling course packages
- Offset dates & times

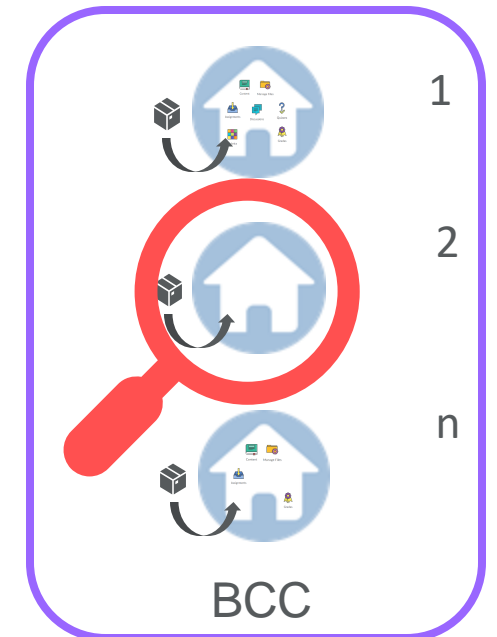


Before you begin inputting data into your request file, start by formatting your cells to be text-based to avoid leading 0s from being dropped



Bulk Course Create (BCC)

★ Destination Course (Code)	★ Destination Course (Name)	Semester (Code)	★ Course Template (Code)	★ Course Template (Name)	★ Department (Code)	★ Course Package Path	Active Status	Link to Existing
MS21	Master Shell 2021	2021	MC21	Master Courses 2021	HR	/content/BCC/CoursePackages/D2LExport_7500_masterofmasters_202191829.zip		TRUE
NES21	New Empty Shell 2021		SFTemp21	2021	HR	none	TRUE	
0002_MASTER	Policy 2021		PLTemp21		HR	/content/BCC/CoursePackages/D2LExport_7501_policymaster_202191830.zip	FALSE	

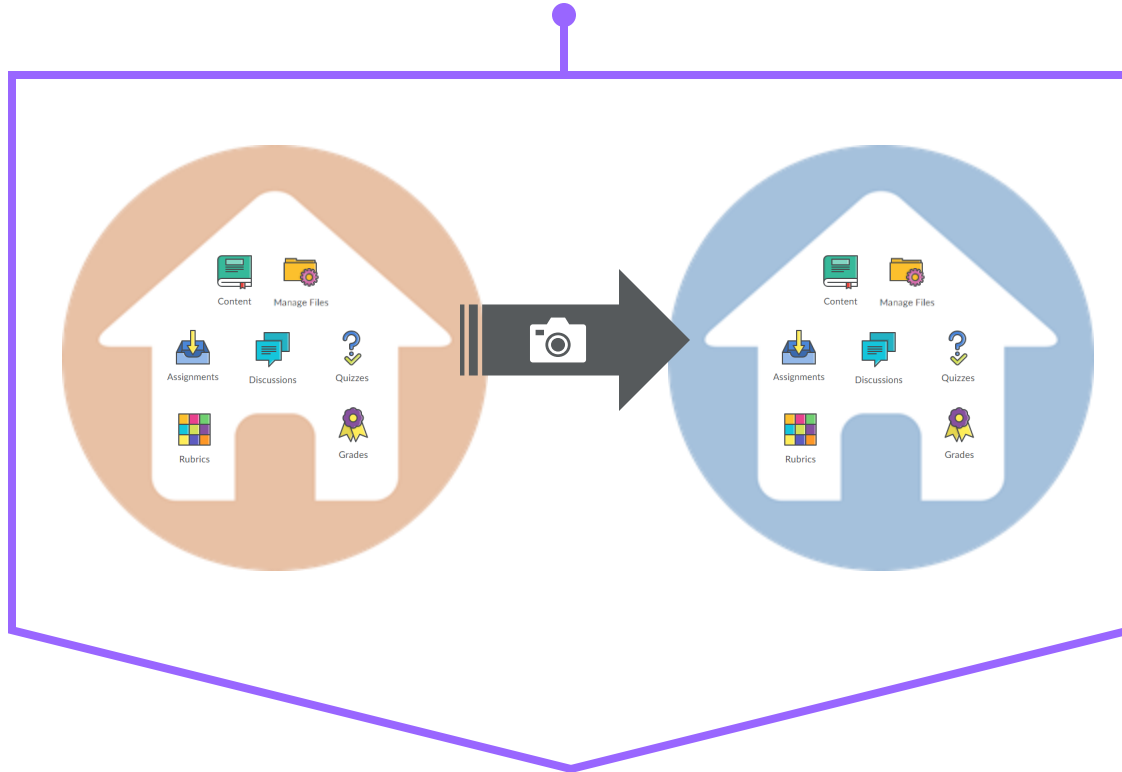


Omitting a course package path will result in the creation of empty course shells, which in some cases is desirable

★ required parameters

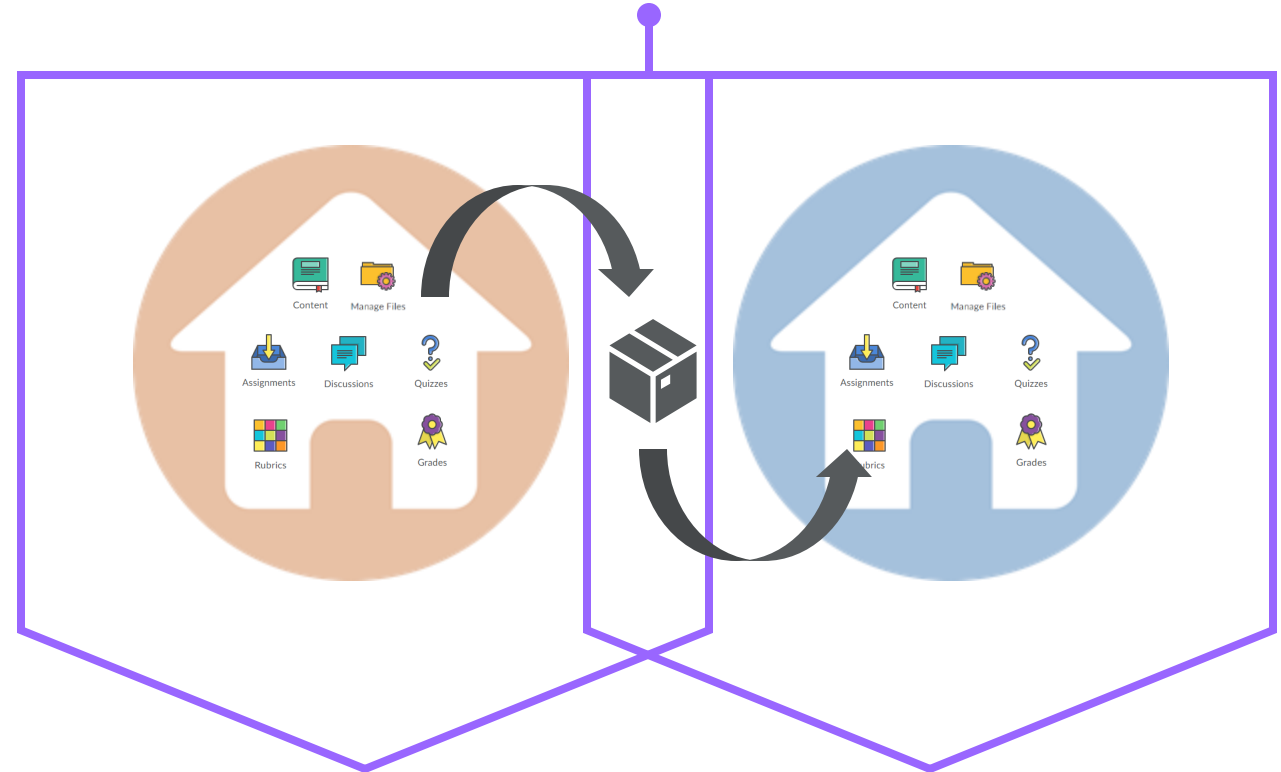
CCB, BCE, BCC Delineation

does not handle course packages



Copy Course Bulk
(CCB)

handles course packages



Bulk Course Export
(BCE)

Bulk Course Create
(BCC)

CCB, BCE, BCC Delineation

I want to populate course shell with content from source courses within the same learning environment.

I want to offset dates at the same time as copying course components

Copy Course Bulk
(CCB)

I want to backup my courses in bulk

I want to migrate content out of the learning environment

Bulk Course Export
(BCE)

I want to create empty course shells

I want to create a course and source its content from outside the learning environment

Bulk Course Create
(BCC)

Bulk Tool Delineation

Copy Course Bulk
(CCB)

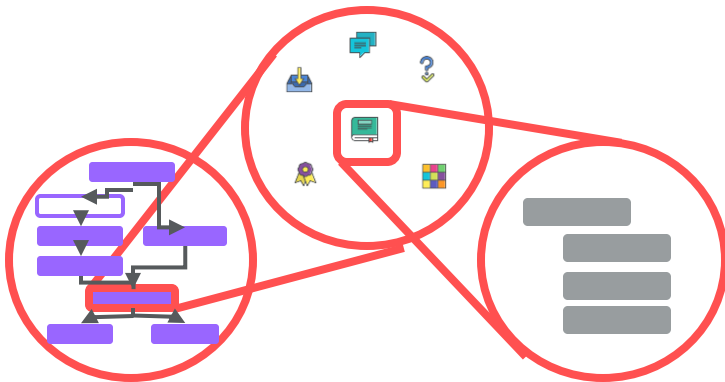
Bulk Course Export
(BCE)

Bulk Course Create
(BCC)

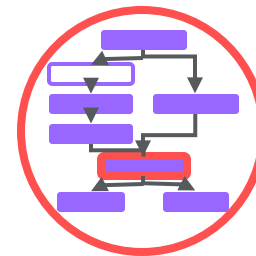
Course Updater

Manage Dates

Bulk User
Management



Courses, Components, Course Objects



Courses



Course Objects



Users

Case Study

A fictional organization has piloted some new professional development courses inside of their existing Brightspace Learning Environment. They've had great success and they are now looking to decouple these offerings into a dedicated PD org that they plan to launch Jan 2022.

They want to migrate some existing offerings that they piloted in their production environment, as well as move over some new courses that they developed in their dev environment.

They want to proactively complete user enrollment so that learners will be able to see any future-dated courses they've been enrolled into. They do not, however, want users to be able to access them until the go-live when their new PD initiative launches in Jan 2022.

At some point, they will also need to backup the courses as their data retention policy states that all courses and content must be removed no more than two years past the course end date.



Additional Resources

Bulk User Management

[Import multiple users with the Bulk User Management tool](#)
[Bulk User Management Tool](#)

Course Updater

[Update course start and end dates](#)
[Update Course Start And End Dates](#)

Bulk Course Tools (CCB, BCE, BCC)

[Perform bulk course operations](#)
[Bulk Course Tools – Administrator Guide](#)

Manage Dates

[About Manage Dates](#)
[Offset Dates in Manage Dates](#)

Q/A

Thank you!

Want a different topic? Comment on our
community page!