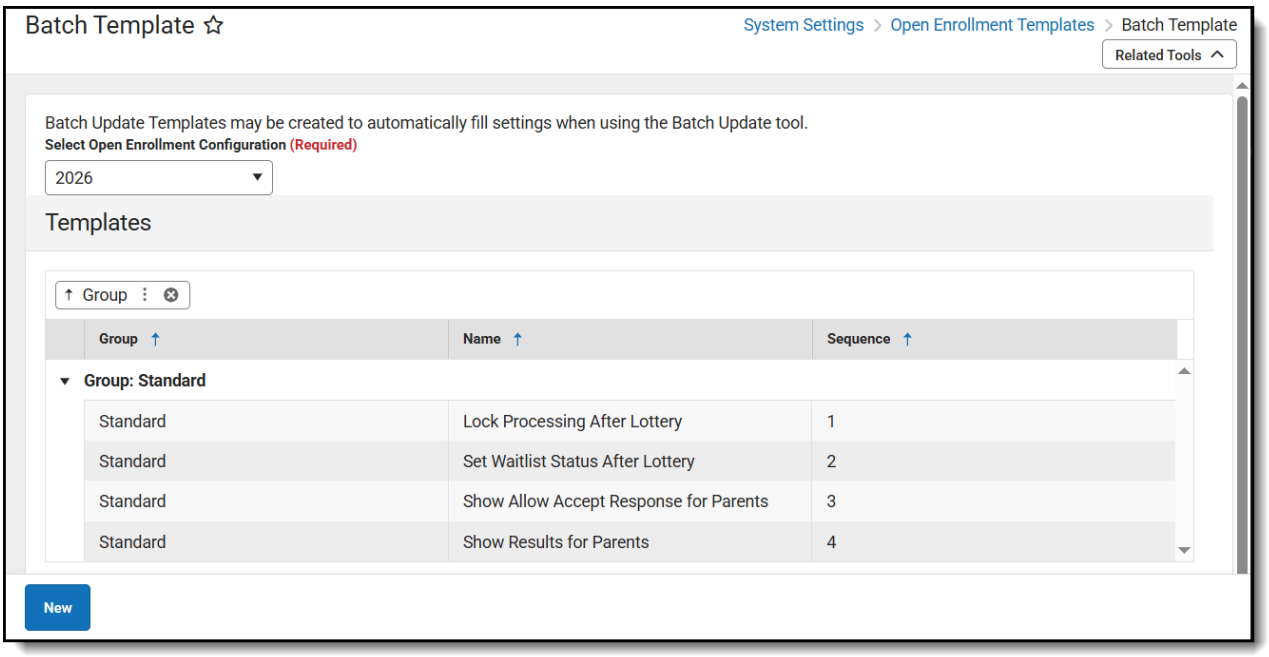
Batch Template

Last Modified on 07/09/2026 12:12 pm CDT

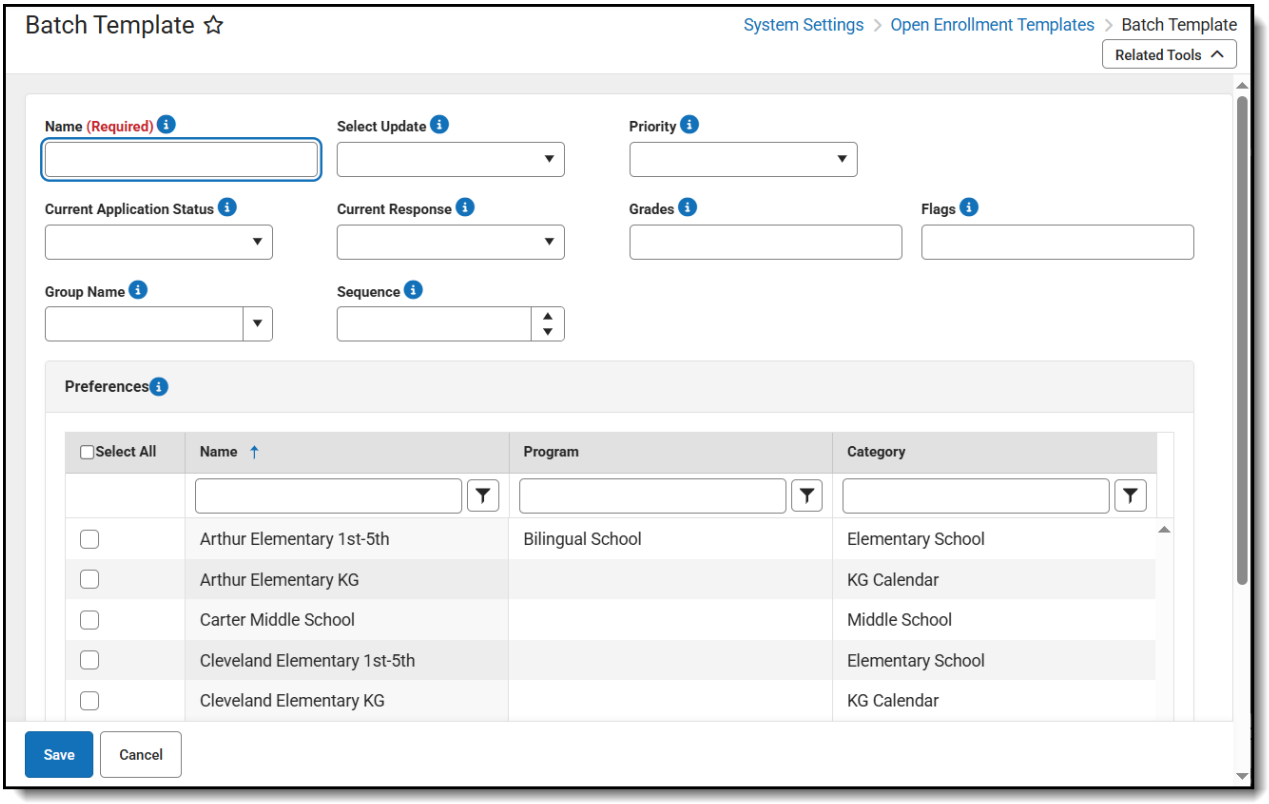
Tool Search: Batch Template

The Batch Template tool is used to automatically fill settings when using the Batch Updates tool. Templates for a specific configuration can be viewed by selecting a configuration from the Select Open Enrollment Configuration and then clicking the name of the template within the list.

See the Open Enrollment Templates Tools Tool Rights article for information on rights needed to use this and related tools.



Creating a New Batch Template



Select all filters and options you wish to apply to Batch Updates using a template in the future. Templates can be deleted by clicking them from the list of available templates and clicking Delete.

1. Click **New.**
2. Enter a Name. Names must be unique for this Configuration.
3. Select an **Update**. This will be the update that is applied to the selected applications. The following updates are available:
    - Set Application Status - Sets the Application Status of all applications found via the filters and options below to the Application Status of your choosing.
    - Set Response - Sets the Response of all applications found via the filters and options below to the Response of your choosing.
    - Lock Lottery Processing - Locks all applications found via the filters and options below from being processed in a lottery.
    - Unlock Lottery Processing - Unlocks all applications found via the filters and options below and allows them to be processed in a lottery.
    - Show Results in OLR - Show the lottery results in OLR for all applications found via the filters and options below.
    - Hide Results in OLR - Hide the lottery results in OLR for all applications found via the filters and options below.
    - Enable Allow Accept in OLR - Enabled the ability of a parent or guardian to accept their OE results for all applications found via the filters and options below.
    - Disable Allow Accept in OLR - Disabled the ability of a parent or guardian to accept their OE results for all applications found via the filters and options below.
    - Lock Application Changes - Lock all applications found via the filters and options below from having changes made.
    - Unlock Application Changes - Unlock all applications found via the filters and options

below, and allow them to be changed.

4. Select a **Priority**.
    - Only applications for the selected Priority will be included. If blank, all priorities will be included.
5. Select a **Current Application Status**.
    - Only applications that currently have the selected Status will be included. If blank, all statuses will be included.
6. Select a **Current Response**.
    - Only applications that currently have the selected Response will be included. If blank, all responses will be included.
7. Select **Grades**.
    - Only applications for the selected Grades will be included. At least one Grade is required.
8. Select any of the available **Flags**.
    - If at least one Flag is selected, only applications for the selected Flags will be included. Flags are not required.
9. Select an existing Group Name or enter a new Group Name.

    This field places the template in a Group. Groups are used to help organize templates.

10. Enter a **Sequence**. This will determine the order the templates will be listed.
11. Select any **Preferences**.
    - Only applications for the selected Preference will be included. At least one Preference is required.
12. Click **Save**.