



# USER GUIDE

## Bulk Updates

2024.3 – September 2024

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# Bulk Updates

Bulk update is an efficient way of updating multiple objects in a single operation, and it is available on the majority of objects in Tree or System Setup that have an editor. A user can also run the bulk update process on a collection, on a search result, or multiple selected objects.

The Bulk Update wizard guides a user through the process, and ensures all necessary settings and data is provided to run the update.

## Setup Requirements

Setting up and using a bulk update involves the following steps:

1. Determine the method required to start the Bulk Update wizard as described in **Creating a Bulk Update**.
2. In the wizard, choose a previously saved configuration or create a new one as described in **Bulk Update Configuration**.
3. In the wizard, choose one or more operations that will run during the update as described in **Bulk Update Operations**.
4. In the wizard, supply the required parameters as described in **Bulk Update Parameters**.
5. In the wizard, review the expected results of the update as described in **Bulk Update Preview**.
6. In the wizard, set the required options and run the bulk update as described in **Bulk Update Advanced**.

## Additional Information

The following information is useful once a bulk update is created or run:

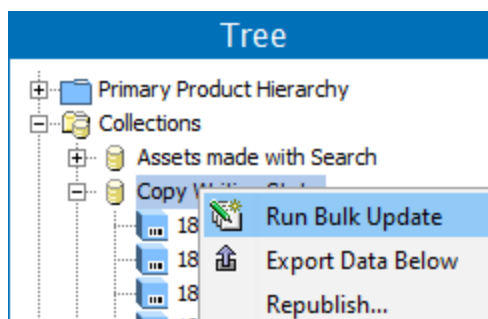
1. Monitor a bulk update through a background process as described in **Monitoring Bulk Updates**.
2. Schedule a bulk update as described in **Scheduling Bulk Updates for Collections**.
3. Export a bulk update definition as comments and submit to an external source control system for comparison purposes as described in **Configuration Management** documentation.

# Creating a Bulk Update

The bulk update functionality allows a user to easily update a large number of objects in a single operation.

To perform a bulk update:

1. Determine the data that should be updated.
2. Use one of the following methods to select data to be updated and launch the Bulk Update wizard.
  - **Run on all objects in a single collection or multiple collections:** In Tree, select one or more collections, right-click and choose **Run Bulk Update**.

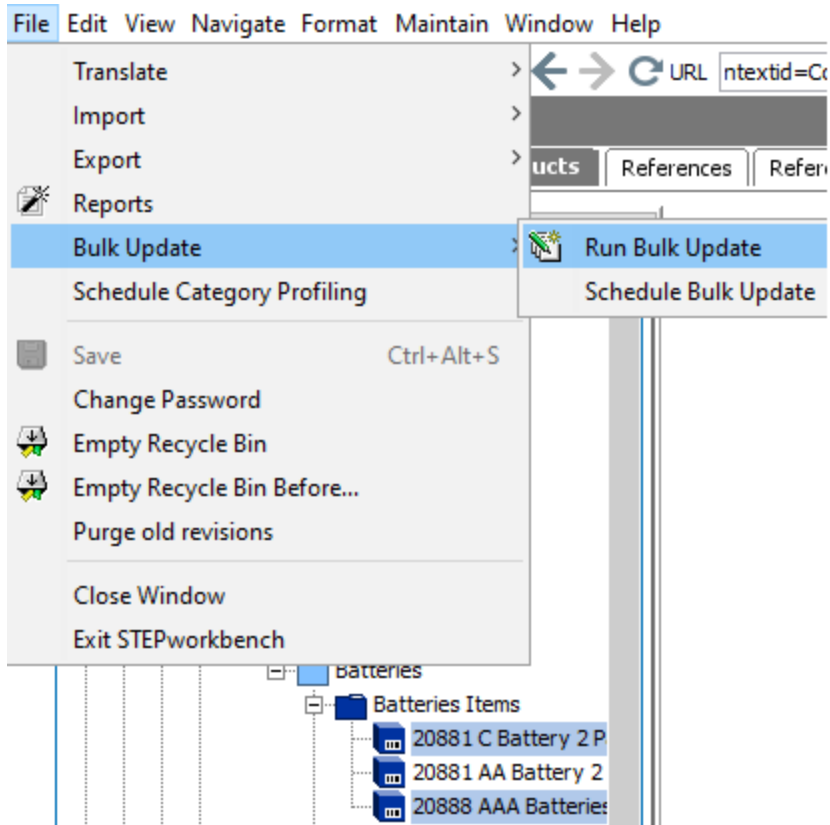


- **Run on a single or multiple selected objects in Tree or System Setup:** Select one or more of the objects defined in the following table, then from the menu choose File > Bulk Update > **Run Bulk Update**.

**Note:** To run a saved bulk update configuration (which loads the operations and settings) first start the wizard, and then choose the existing configuration on the Configuration step shown below.

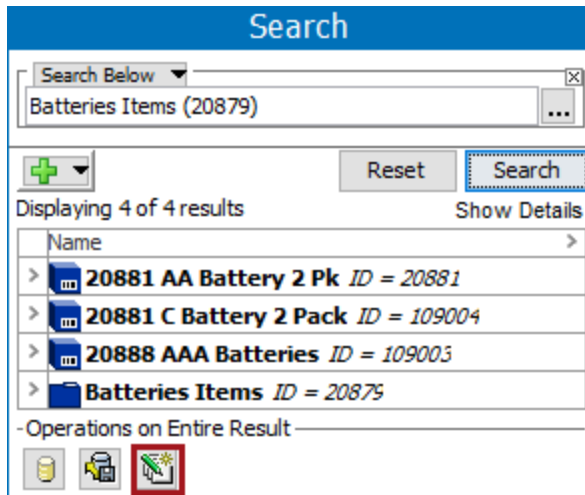
| Tree Objects                                                                                                                                                                                                                                                                                                                | System Setup Objects                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>• Assets</li> <li>• Classifications</li> <li>• Collections</li> <li>• Configurations</li> <li>• eCatalogs</li> <li>• Entities</li> <li>• Index Words</li> <li>• Products</li> <li>• Publication groups</li> <li>• Publication object sections</li> <li>• DTP documents in</li> </ul> | <ul style="list-style-type: none"> <li>• Attributes</li> <li>• Attribute Transformations</li> <li>• Asset Importer</li> <li>• Change Packages</li> <li>• Completeness Metrics</li> <li>• Event Processors</li> <li>• Event Queues</li> <li>• Gateway Endpoints</li> <li>• GDSN- Data pool- Receiver or publisher</li> <li>• Global Business Rules (actions, conditions, and libraries)</li> </ul> | <ul style="list-style-type: none"> <li>• List of Values</li> <li>• Match Codes and Matching Algorithms</li> <li>• Outbound Integration Endpoints</li> <li>• Tables</li> <li>• Tags</li> <li>• Units</li> <li>• Users and Groups</li> <li>• Web UIs</li> <li>• Workflows</li> <li>• Workflow Profiles</li> <li>• Reference types / link types</li> <li>• Object type &amp; structures (asset,</li> </ul> |

| Tree Objects              | System Setup Objects                                                                          |                                                                                                                                |
|---------------------------|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| the publication hierarchy | <ul style="list-style-type: none"> <li>Inbound Integration Endpoints</li> <li>Keys</li> </ul> | classification, publication, setup group, etc.)<br><ul style="list-style-type: none"> <li>Context -Dimension points</li> </ul> |



- **Run on search results:** Perform a search, and click the **Bulk Update** button ().

For more on the Advanced Search tab in workbench, refer to the Advanced Search topic in the Getting Started documentation.



**Search**

Search Below  
Batteries Items (20879)

Reset Search

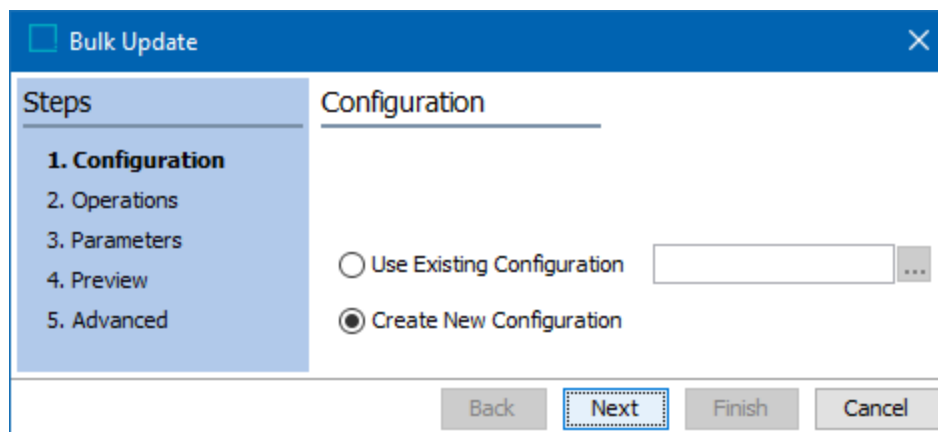
Displaying 4 of 4 results Show Details

| Name                                 |
|--------------------------------------|
| > 20881 AA Battery 2 Pk ID = 20881   |
| > 20881 C Battery 2 Pack ID = 109004 |
| > 20888 AAA Batteries ID = 109003    |
| > Batteries Items ID = 20879         |

Operations on Entire Result

Icons: Database, Print, Bulk Update (highlighted)

3. The Bulk Update wizard displays and can involve the following steps:



**Bulk Update**

Steps

- 1. Configuration
- 2. Operations
- 3. Parameters
- 4. Preview
- 5. Advanced

Configuration

☐ Use Existing Configuration

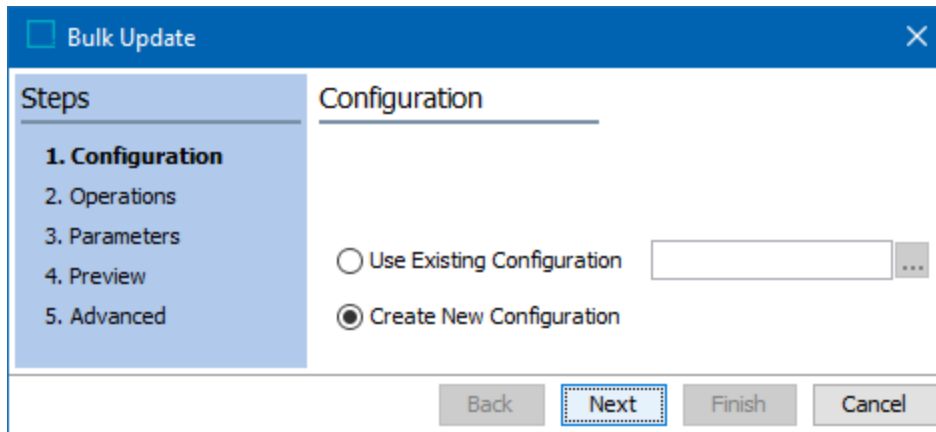
☒ Create New Configuration

Back Next Finish Cancel

- Bulk Update Configuration allows you to choose a previously saved configuration or create a new one.
- Bulk Update Operations allows you to choose one or more operations that will run during the update.
- Bulk Update Parameters allows you to supply any required parameters.
- Bulk Update Preview allows you to review the expected results of the update.
- Bulk Update Advanced allows you to set the required options and start the background process that runs the bulk update.

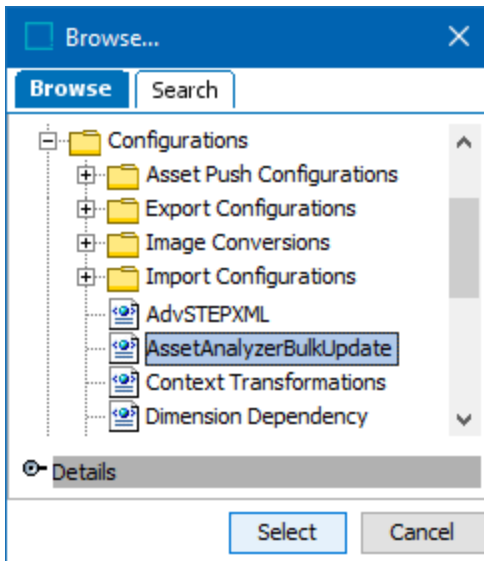
# Bulk Update Configuration

Specify the configuration that should be run for the bulk update.



The dialog box is titled "Bulk Update" and has a close button (X) in the top right corner. It is divided into two main sections: "Steps" on the left and "Configuration" on the right. The "Steps" section contains a list of five steps: 1. Configuration, 2. Operations, 3. Parameters, 4. Preview, and 5. Advanced. Step 1 is currently selected. The "Configuration" section contains two radio buttons: "Use Existing Configuration" and "Create New Configuration". The "Create New Configuration" radio button is selected. To the right of the "Use Existing Configuration" radio button is a text box with an ellipsis button (...). At the bottom of the dialog box are four buttons: "Back", "Next", "Finish", and "Cancel". The "Next" button is highlighted with a dashed border.

1. Choose the option for the desired configuration:
  - Click the 'Use Existing Configuration' radio button to use a saved bulk update configuration, then click the ellipsis button (...) to display the configuration selection dialog. Use the Browse or Search tab to select the relevant configuration and click the **Select** button.



The dialog box is titled "Browse..." and has a close button (X) in the top right corner. It has two tabs: "Browse" and "Search". The "Browse" tab is selected. The main area of the dialog box shows a tree view of configurations. The tree structure is as follows:
 

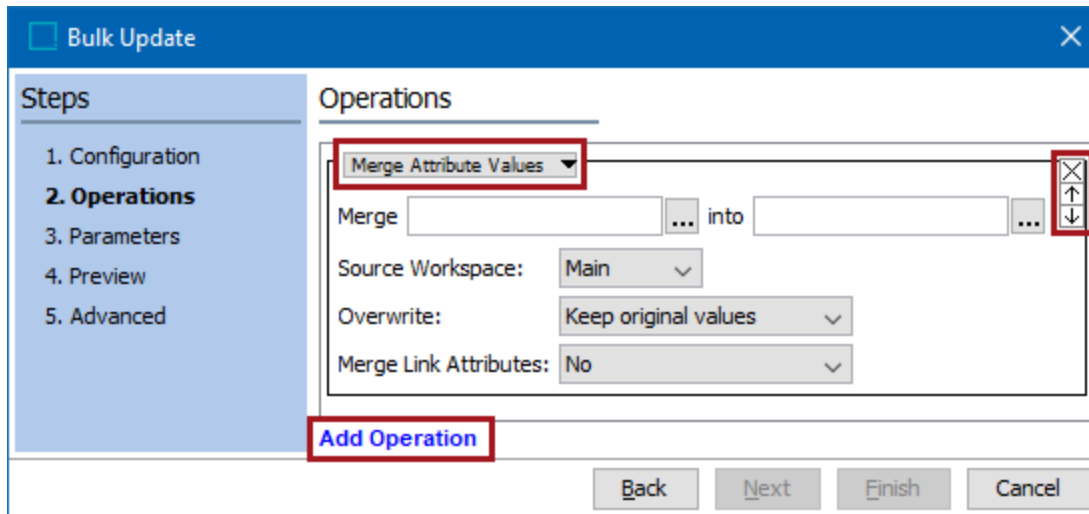
- Configurations
  - Asset Push Configurations
  - Export Configurations
  - Image Conversions
  - Import Configurations
  - AdvSTEPXML
  - AssetAnalyzerBulkUpdate (selected)
  - Context Transformations
  - Dimension Dependency

 At the bottom of the dialog box are two buttons: "Select" and "Cancel".

- Click the 'Create New Configuration' radio button to create a new configuration.
2. Click the **Next** button to display the **Bulk Update Operations** step.

# Bulk Update Operations

Specify the operations the bulk update should perform on the selected objects. When an existing configuration is selected, all saved operations are displayed.



**Bulk Update**

**Steps**

- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

Merge Attribute Values

Merge [ ] ... into [ ] ...

Source Workspace: Main

Overwrite: Keep original values

Merge Link Attributes: No

**Add Operation**

Back Next Finish Cancel

1. Add or edit the required operations as follows:
  - For a new configuration, the default 'Merge Attribute Values' operation is displayed. Select the desired operation from the dropdown as defined in the individual topics that follow this topic.
  - Click the 'Add Operation' link to configure an additional operation.
  - Click the delete button (✕) to remove an operation.
  - Click the up and down arrow buttons (↑↓) to change the order of the operations applied to the update.

**Important:** Ensure that the operations are listed in the order that they need to be performed—from the top down. This means that when multiple operations are included, those run first can be overwritten by operations that run later. If one operation fails for an object (for example, due to validation base type mismatch), all changes to the object will be rolled back and the object will be left as it was prior to applying the Bulk Update.

2. Click the **Next** button to display the **Bulk Update Parameters** step.

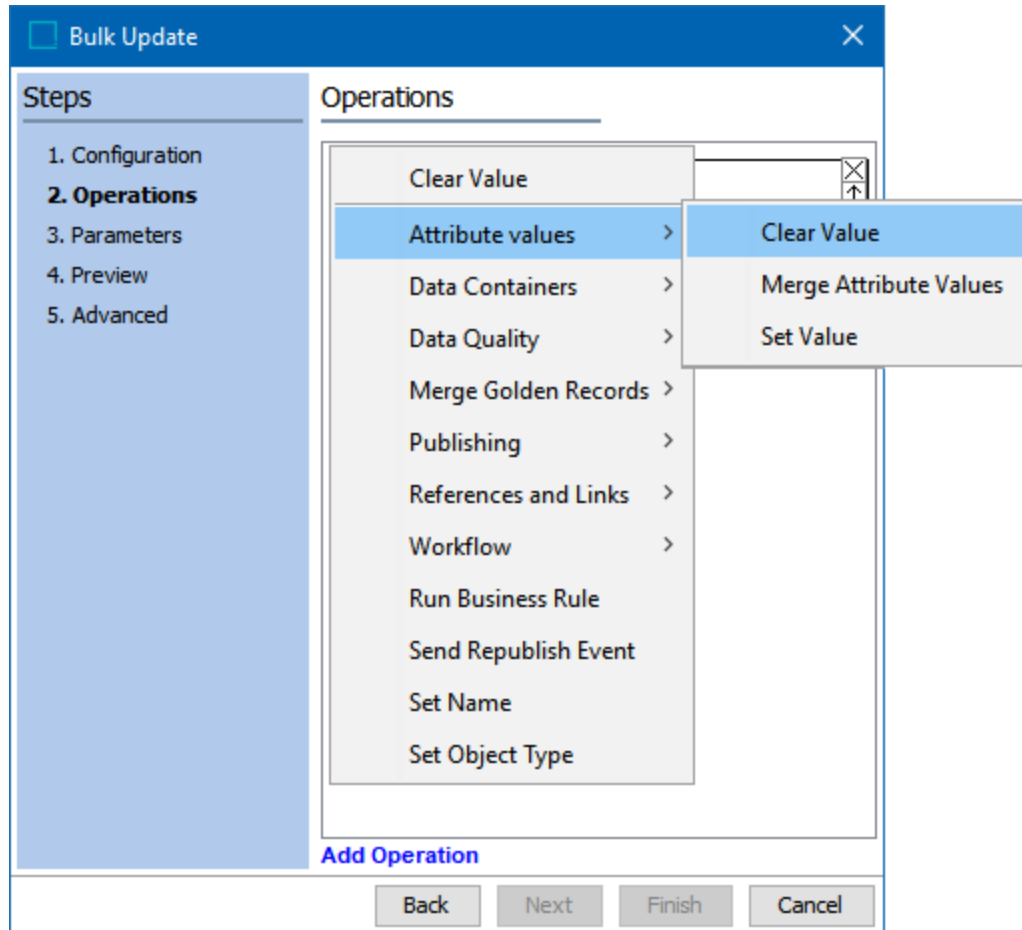
# Attribute Values: Clear Value Operation

The Clear Value bulk update plugin allows for clearing values across one or all contexts.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Clear Value** (found under 'Attribute values') from the dropdown.



2. For the Attribute parameter, click the ellipsis button (...) and make an attribute selection using standard Browse / Search node picker functionality within the Select Attribute dialog.

**Bulk Update**

**Steps**

- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

Clear Value ▼

No Attribute Selected

Attribute

In all contexts ☐

[Add Operation](#)

Back Next Finish Cancel

- Click to enable the 'In all contexts' checkbox if you are clearing an attribute value in all contexts. Otherwise, the values will only be cleared for the context you are currently in.
- Click Next or Finish to save your selections and complete the Bulk Update wizard setup.

# Attribute Values: Merge Attribute Values Operation

This operation copies the values from the first selected attribute to another selected attribute, in the current workspace, based on the parameter settings. For dimension dependent attributes, the copy is performed across all dimensions or applicable combinations of dimensions.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can be started from System Setup by selecting an attribute, then right-click and select Merge Attribute Values. For details about verifying the attributes before performing this operation, refer to the **Merging Attribute Values** section of the **System Setup**.

This operation can also be run via the business rules functionality, as described in the **Business Action: Merge Attribute Values** topic in the **Business Rules** documentation.

**Note:** The Merge Attribute Values operation does not delete any attributes, it can only update values. If desired, manually delete the source attribute once you confirm the merged data.

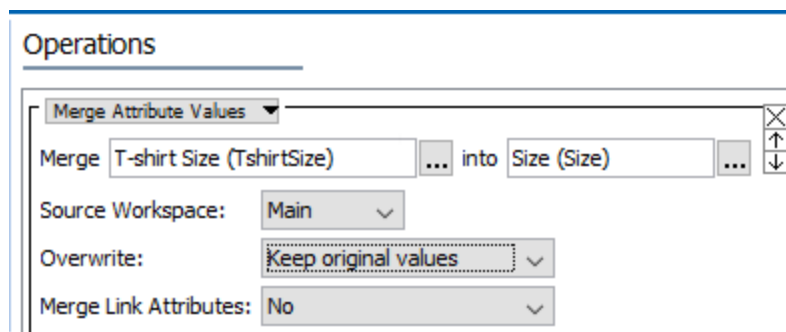
## Prerequisites

Before using this operation:

1. Ensure the source and target attributes are valid for all of the same object types, and for the object on which the business action will be run.
2. Ensure the source and target attributes are valid for all of the same product links and classification links.
3. Ensure the source and target attributes are valid for all of the same reference types.
4. Ensure the source and target attributes have the same dimension dependencies.

## Configuration

1. Select **Merge Attribute Values** from the dropdown.



The screenshot shows the 'Operations' window with the 'Merge Attribute Values' operation selected. The configuration fields are as follows:

- Merge:** A dropdown menu showing 'Merge Attribute Values'.
- Source:** A text box containing 'T-shirt Size (TshirtSize)' followed by an ellipsis button (...).
- into:** A text box containing 'Size (Size)' followed by an ellipsis button (...).
- Source Workspace:** A dropdown menu showing 'Main'.
- Overwrite:** A dropdown menu showing 'Keep original values'.
- Merge Link Attributes:** A dropdown menu showing 'No'.

2. For the **Merge** parameter, click the ellipsis button (...) to display the Select Attribute dialog, choose the attribute to copy values from, and click the **Select** button.

3. For the **into** parameter, click the ellipsis button (...) to display the Select Attribute dialog, choose the attribute to copy values to, and click the **Select** button.
4. For the **Source Workspace** parameter, use the dropdown to select the workspace that holds the values to be copied. Values are always pasted into the Main workspace.
5. For the **Overwrite** parameter, use the dropdown to select one of the following options. Validation errors are displayed when a value cannot be modified. Refer to an illustration of the results in the **Merge Results** section below.
  - **Overwrite existing values** means the source value overwrites the target value, except when the source attribute is blank. If the source attribute is blank, the target value is not changed.
  - **Keep Original values** means the source value is only copied to the target attribute when the target attribute is blank. If the target attribute contains a value, the target value is not changed.
6. For **Merge Link Attributes**, use the dropdown to select one of the following options. If the selected attributes are both used as an attribute on a reference, a product classification link, or an attribute link, merging of those values are based on the **Yes** or **No** set in this parameter, as well as the other parameters on the operation. This option is not relevant when values do not exist on references for the selected attributes.

## Merge Results

As indicated in the following table, the source attribute value, target attribute values, and the overwrite setting together determine the end result of this action.

| Source Attribute Value | Target Attribute Value | Overwrite Setting      | Target After Merge |
|------------------------|------------------------|------------------------|--------------------|
| <empty>                | OriginalValue          | <any>                  | OriginalValue      |
| NewValue               | <empty>                | <any>                  | NewValue           |
| NewValue               | OriginalValue          | [Overwrite Existing]   | NewValue           |
| NewValue               | OriginalValue          | [Keep Original Values] | OriginalValue      |

## Examples

Consider the following example data, and assume that Overwrite existing values is selected (as described above). Selecting the Source Workspace = Main will result in writing the T-shirt Size value of S, while selecting Source Workspace = Approved will write the XS value.

**Tree**

- Cotton T-Shirts
  - 18210 M B
  - 18212 L B
  - 18213 M O
  - 18216 L O
- T-Shirts Sales Items

18210 M B rev.0.23 - Compare Workspa...

Compare Workspaces
References
Referenced By

View: MergeValues

|              | Main      | Approved    |
|--------------|-----------|-------------|
| ID           | 18210     | 18210       |
| Name         | 18210 M B | 18210 M B   |
| Size         | small     | extra small |
| T-shirt Size | S         | XS          |

Consider the following data and the effects of the options as shown in the Preview images below. 'T-shirt Size' is the source attribute and 'Size' is the target attribute:

**Tree**

- Cotton T-shirts
  - 18210 M B
  - 18212 L B
  - 18213 M O
  - 18216 L O
- T-Shirts Sales Items

Products

Products
References
Referenced By

View: SizeAttrs

| ID    | Name      | T-shirt Size | Size   |
|-------|-----------|--------------|--------|
| 18210 | 18210 M B | S            | small  |
| 18212 | 18212 L B | S            |        |
| 18213 | 18213 M O |              | Medium |
| 18216 | 18216 L O |              |        |

- Notice that the only value changed in this scenario is for object 18212 L B, since the source object had a value and the target value was blank. Since the other objects either had values for the target or the source was blank, none of them were modified.

| Preview   |     |                        |
|-----------|-----|------------------------|
| Object    |     | Merge Attribute [Size] |
| 18210 M B | Old | [small]                |
|           | New | [small]                |
| 18212 L B | Old |                        |
|           | New | [S]                    |
| 18213 M O | Old | [Medium]               |
|           | New | [Medium]               |
| 18216 L O | Old |                        |
|           | New |                        |

- Notice that two values changed in this scenario: object 18210 M B had its value overwritten since a value existed for the source, and object 18212 L B was overwritten since the source object had a value and the target value was blank. Objects 18213 M O and 18216 L O both had blank source values, so the target values were not overwritten.

Preview

| Object >    |     | Merge Attribute [Size] > |
|-------------|-----|--------------------------|
| > 18210 M B | Old | [small]                  |
| > 18210 M B | New | [S]                      |
| > 18212 L B | Old |                          |
| > 18212 L B | New | [S]                      |
| > 18213 M O | Old | [Medium]                 |
| > 18213 M O | New | [Medium]                 |
| > 18216 L O | Old |                          |
| > 18216 L O | New |                          |

Consider the following values for the attributes 'Qty of Next Lower Package' and 'Qty of Next Higher Package' on the Case to Child reference.

Tree

- Collections
  - All PPH
  - Backplate
  - Baskets
  - Beds
  - Bottled Water
  - Tshirt Case
    - T-shirt, case (L B)
    - T-shirt, case (L O)
    - T-shirt, case (M B)
    - T-shirt, case (M O)

No Title

Products Refereres Referenced by

Item References, Cossification

Packaging HierarchReferences

Reference Type: Case to Child

| Source                  | Reference Type > | Target    | Qty Of Next Lower Package > | Qty of Next Higher Package > |   |
|-------------------------|------------------|-----------|-----------------------------|------------------------------|---|
| > T-shirt, case (L B) + | Case To Child    | 18212 L B | 48                          | 96                           | X |
| > T-shirt, case (L O) + | Case To Child    | 18216 L O | 24                          |                              | X |
| > T-shirt, case (M B) + | Case To Child    | 18210 M B |                             | 36                           | X |
| > T-shirt, case (M O) + | Case To Child    | 18213 M O |                             |                              | X |

- Setting the operation parameters as 'Qty of Next Lower Package' for the source, 'Qty of Next Higher Package' for the target, using the Overwrite existing values, and setting Merge Link Attribute = Yes results in this preview of resulting values:

Preview

| Object >              |     | Merge Attribute [QtyNextHigherPackage] > |
|-----------------------|-----|------------------------------------------|
| > T-shirt, case (L B) | Old | [18212(96)]                              |
| > T-shirt, case (L B) | New | [18212(48)]                              |
| > T-shirt, case (L O) | Old |                                          |
| > T-shirt, case (L O) | New | [181951(24)]                             |
| > T-shirt, case (M B) | Old | [18210(36)]                              |
| > T-shirt, case (M B) | New | [18210(36)]                              |
| > T-shirt, case (M O) | Old |                                          |
| > T-shirt, case (M O) | New |                                          |

For more information about attributes on references, refer to the **Product Attribute Link Type** section of the **System Setup** documentation.

# Attribute Values: Set Value Operation

Sets the value of the selected attribute based on a value entered manually or via a function.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

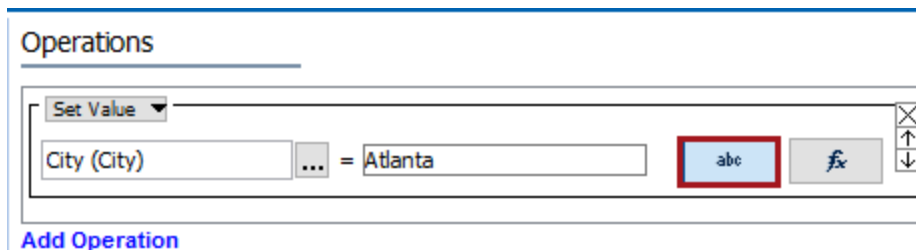
This operation is similar to one in the business rules functionality, as described in the **Business Action: Set Attribute Value** topic in the **Business Rules** documentation.

## Configuration

1. Select **Set Value** from the dropdown.
2. For the first parameter, click the manual () button or the function () button and then click the ellipsis button ().

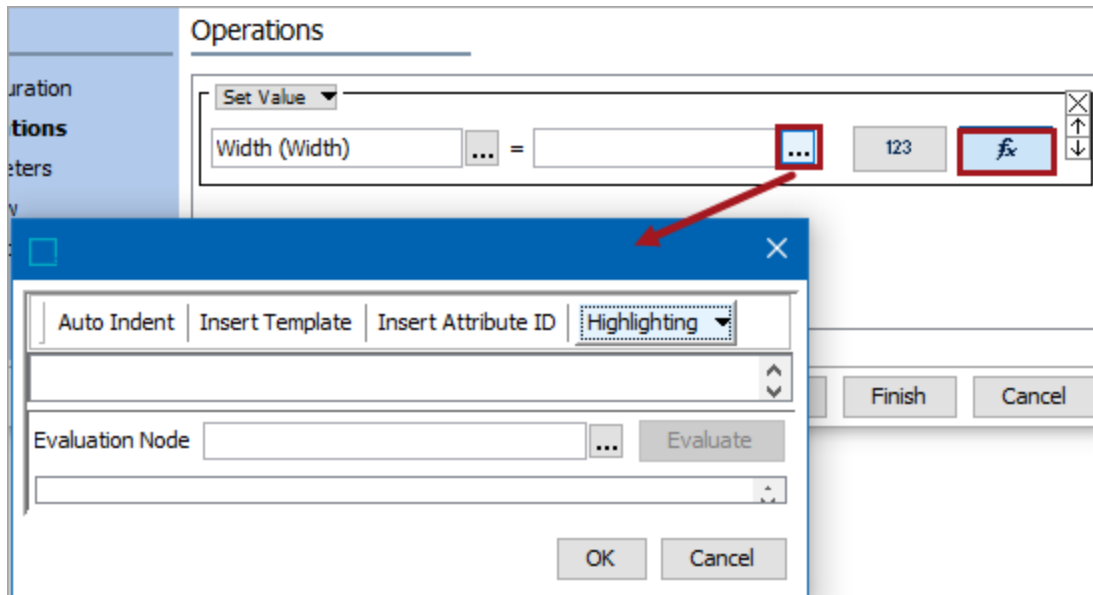
**Note:** The selected object dictates the label on the manual button. If the selected object requires a text value, the label is 'abc.' If the selected object is numeric, '123' is displayed, and so on for each validation base type.

- For manual selection, the Select Attribute dialog is displayed, select an attribute, and click **Select**.



The screenshot shows a dialog box titled "Operations". Inside, there is a dropdown menu set to "Set Value". Below it, a configuration row is shown: "City (City)" followed by an ellipsis button "...", an equals sign "=", and the text "Atlanta". To the right of "Atlanta" is a manual button labeled "abc" (which is highlighted with a red rectangle in the image) and a function button labeled "fx". To the right of the function button are up and down arrow buttons. Below the entire configuration area is a button labeled "Add Operation".

- For function selection, click the ellipsis button () displayed near the text field to display the Function Editor dialog. Add a function and evaluate, then click **OK**. Refer to the **Using Function Editor** topic within the **Resource Materials** online help for more information on writing functions.
3. For the second parameter (=), click the manual () button or the function () button.
    - For manual selection, type the value required for the selected attribute into the text field.
    - For function selection, click the ellipsis button () displayed near the text field to display the Function Editor dialog. Add a function and evaluate, then click **OK**. Refer to the **Using Function Editor** topic within the **Resource Materials** online help for more information on writing functions.



# Data Containers: Update Data Containers Operation

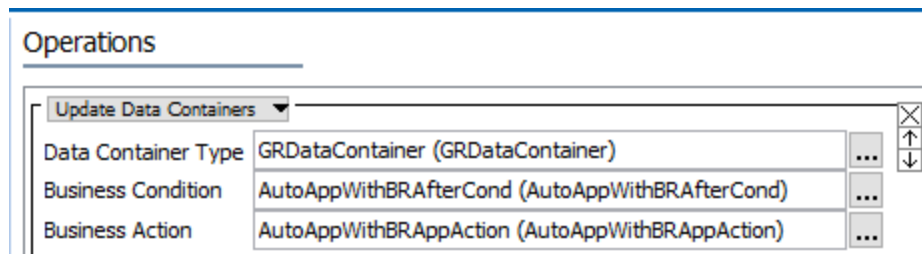
This operation is available for Data Containers. For more information on Data Containers, refer to the **Data Containers** topic in the **System Setup** documentation.

This operation allows users to run business actions on selected data container objects. When executing this operation, users can filter which data container objects to work with by specifying a business condition and/or data container type, before running the specified business action on those objects.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Update Data Containers** from the dropdown.



| Operations               |                                                 |     |
|--------------------------|-------------------------------------------------|-----|
| Update Data Containers ▼ |                                                 |     |
| Data Container Type      | GRDataContainer (GRDataContainer)               | ... |
| Business Condition       | AutoAppWithBRAfterCond (AutoAppWithBRAfterCond) | ... |
| Business Action          | AutoAppWithBRAppAction (AutoAppWithBRAppAction) | ... |

2. In the **Data Container Type** parameter, (optional) click the ellipsis button (...), select the data container type this operation should apply to, and click **Select**.
3. In the **Business Condition** parameter, (optional) click the ellipsis button (...), select the data container type this operation should apply to, and click **Select**.
4. In the **Business Action** parameter, (required) click the ellipsis button (...), select the data container type this operation should apply to, and click **Select**.

# Data Quality: Generate Match Codes Operation

Use this operation to generate match code values for the selected objects of the bulk update.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

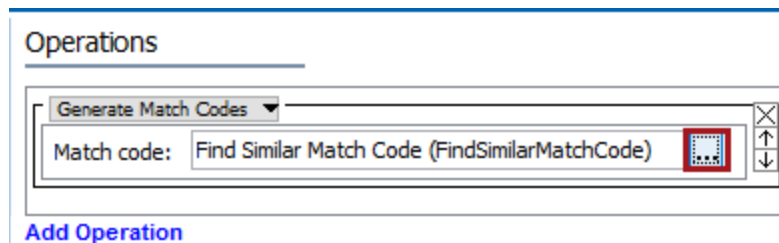
This operation can also be run via the business rules functionality, as described in the **Business Action: Generate Match Codes** topic in the **Business Rules** documentation.

## Prerequisites

Before using this operation, ensure match code objects exist as defined in the **Match Codes** topic of the **Matching, Linking, and Merging** documentation.

## Configuration

1. Select **Generate Match Codes** from the dropdown.



2. For **Match Code**, click the ellipsis button (...) to display the Select a Match Code dialog, and the relevant match code.

**Note:** Collection objects should match to the match code object type and category.

# Data Quality: Match Duplicates Operation

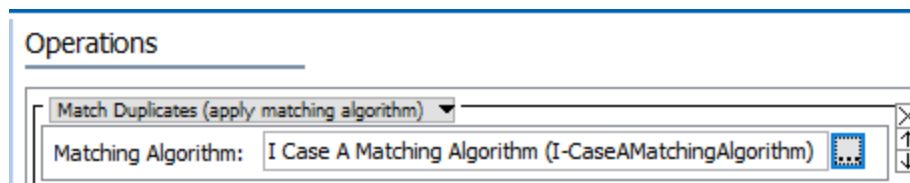
**DEPRECATED.** Instead, use 'Send Republish Event' to Event Processor configured to apply matching using user's matching algorithm, as defined in the **Send Republish Event Operation** topic.

This operation applies the selected matching algorithm on selected objects for the bulk update. This includes generating a list of possible duplicates and a score that indicates how identical the objects are. And if a golden record matching algorithm is used it will also update golden record links and re-apply survivorship rules.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Match Duplicates (apply matching algorithm)** from the dropdown.



2. For the **Matching Algorithm** parameter, click the ellipsis button (...), select the algorithm to use, and click **Select**.

# Data Quality: Standardize Address Operation

This operation allows for different standardization actions to be taken on addresses by using the Loqate solution. If applicable, CASS (Coding Accuracy Support System) operations can also be performed to apply a stricter level of address validation to US-based addresses.

Standardize Address bulk update operations are valid for execution on entities with flat attributes, e.g., Address object types and address Data Containers (Data Containers with address attributes).

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Standardize Address** topic in the **Business Rules** documentation.

## Prerequisites

Before a Standardize Address bulk update operation can be run, the following conditions must be met:

- Users must be connected to a Loqate server, either through a cloud API or local API.
- The Address Component Model must already be configured. It is strongly recommended to configure this component model using the 'Easy setup of Address Component Model' wizard. For more information, refer to the **Address Component Model** section of the **Loqate** documentation.
- To view and use the CASS features, users must:
  - Purchase a CASS license
  - Be connected to Loqate through a *local* API (CASS components will not work with a Loqate Cloud API)
  - Be based in the US, as CASS is not valid outside of the US
  - Configure the CASS Address Component Model. For more information, refer to the **CASS Address Component Model** topic in the **Loqate** documentation.

## Configuration

This documentation topic describes the options available when configuring a Standardize Address bulk update operation. For more detailed information on the overall Loqate and CASS solutions, refer to the **Loqate Integration** section of the **Data Integration** documentation.

1. Select **Standardize Address** from the dropdown.

2. Make selections for the parameters as defined in the following sections.

## Address Standardization Modes Parameter

Three options are available from the Address Standardization Mode dropdown list.

- **Overwrite Existing Standardized Address:** Overwrites an existing standardized address by making a call to Loqate, which returns the latest standardized address and overwrites the existing one.
- **Generate Hash Value Only:** When this option is chosen, the business action will recalculate the 'Validation Hash' value without making a call to Loqate. The hash value is based on the address input fields only and is calculated and maintained by STEP.

This option is used in cases when pre-standardized addresses, which are known to be correct, are imported. Because the addresses are new, no hash value is present. When the 'Generate Hash Value only' action is run, STEP generates a hash value and places it into the 'Validation Hash' field. The hash value lets STEP know that the addresses are new, ensuring that they are not picked up and restandardized by STEP shortly after they are imported. For users of the Loqate Cloud API solution, this saves money by avoiding unnecessary calls to Loqate, since users are charged a fee for every call made to Loqate.

| Tree                                                                                                                                                                                                       |  | 3550 George Busbee Pkwy rev.0.11 - Address |            |                                              |          |        |           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------|------------|----------------------------------------------|----------|--------|-----------|
|                                                                                                                                                                                                            |  | Address                                    | References | Referenced By                                | Matching | Status | State Log |
| <ul style="list-style-type: none"> <li>(ADD_192264)</li> <li>(ADD_192265)</li> <li>(ADD_192269)</li> <li>(ADD_192272)</li> <li>(ADD_215171)</li> <li>3550 George Busbee Pkwy</li> <li>ADD_BLANK</li> </ul> |  | > State                                    | abc        | GA                                           |          |        |           |
|                                                                                                                                                                                                            |  | > Street                                   | abc        | 3550 George Busbee Pkwy NW                   |          |        |           |
|                                                                                                                                                                                                            |  | > Validation Hash                          | abc        | -1618871087                                  |          |        |           |
|                                                                                                                                                                                                            |  |                                            |            | Loqate/-1618871087/<?xml version="1.0" encod |          |        |           |
|                                                                                                                                                                                                            |  |                                            |            | <lt>                                         |          |        |           |

- Disable Address Standardization:** This option is primarily useful for users who import addresses in bulk, either manually or by using an inbound integration. If a business rule is in place that runs a Standardize Address bulk update on import, then selecting 'Disable Address Standardization' is a simple way to temporarily turn off automatic address validation on import. This allows users to validate the addresses later.

### Renew Address Validations Parameter

The checkbox option **Renew address validations older than** allows for addresses older than a designated number of days to be revalidated. This is useful in case an address was validated an extended period of time ago and the address may no longer be valid. The default number of days is 160. The field is disabled by entering the value '0.'

STEP determines the age of an address by the value present in the 'Validation Time' field.

| Tree |                         | < 3550 George Busbee Pkwy rev.0.11 - |            |                     |            |
|------|-------------------------|--------------------------------------|------------|---------------------|------------|
|      |                         | Address                              | References | Referenced By       | Matching   |
| ...  | (ADD_192268)            |                                      |            |                     | </result>  |
| ...  | (ADD_192269)            |                                      |            |                     | </results> |
| ...  | (ADD_192272)            |                                      |            |                     | </lgt>     |
| ...  | (ADD_215171)            |                                      |            |                     |            |
| ...  | 3550 George Busbee Pkwy | > Validation Time                    | abc        | 2017-06-09 09:41:15 |            |
| ...  | ADD_BLANK               | > Zip                                | 12a        | 30144               |            |

**Important:** For users of the Loqate Cloud installation, care should be exercised when using this functionality. Since all addresses older than the specified time period will be revalidated, each additional validation will make a chargeable call to Loqate.

### CASS Validation Parameters

Two CASS address validation options are available on the Standardize Address dialog.

Standardize Address ▼

Address Standardization Mode
Overwrite Existing Standardized Address ▼

Renew address validations older than (if left empty, this option is ignored)
160 Days

Turn on CASS validation for US addresses
☐

CASS Certification Report Event Processor
...

- Turn on CASS validation for US addresses:** If checked, all addresses are sent for standardization to the Loqate Local server integration and also validated against CASS data.
- CASS Certification Report Event Processor:** If you would also like a CASS certification report generated after using CASS validation on an address, click the ellipsis button (...) and select the relevant CASS certification report event processor from the 'Select Event Processor' dialog. For more information, refer to the **CASS Certification Report Processing Plugin Parameters and Triggers** section of the **Event Processors** documentation.

# Merge Golden Records: Merge Clerical Review Tasks

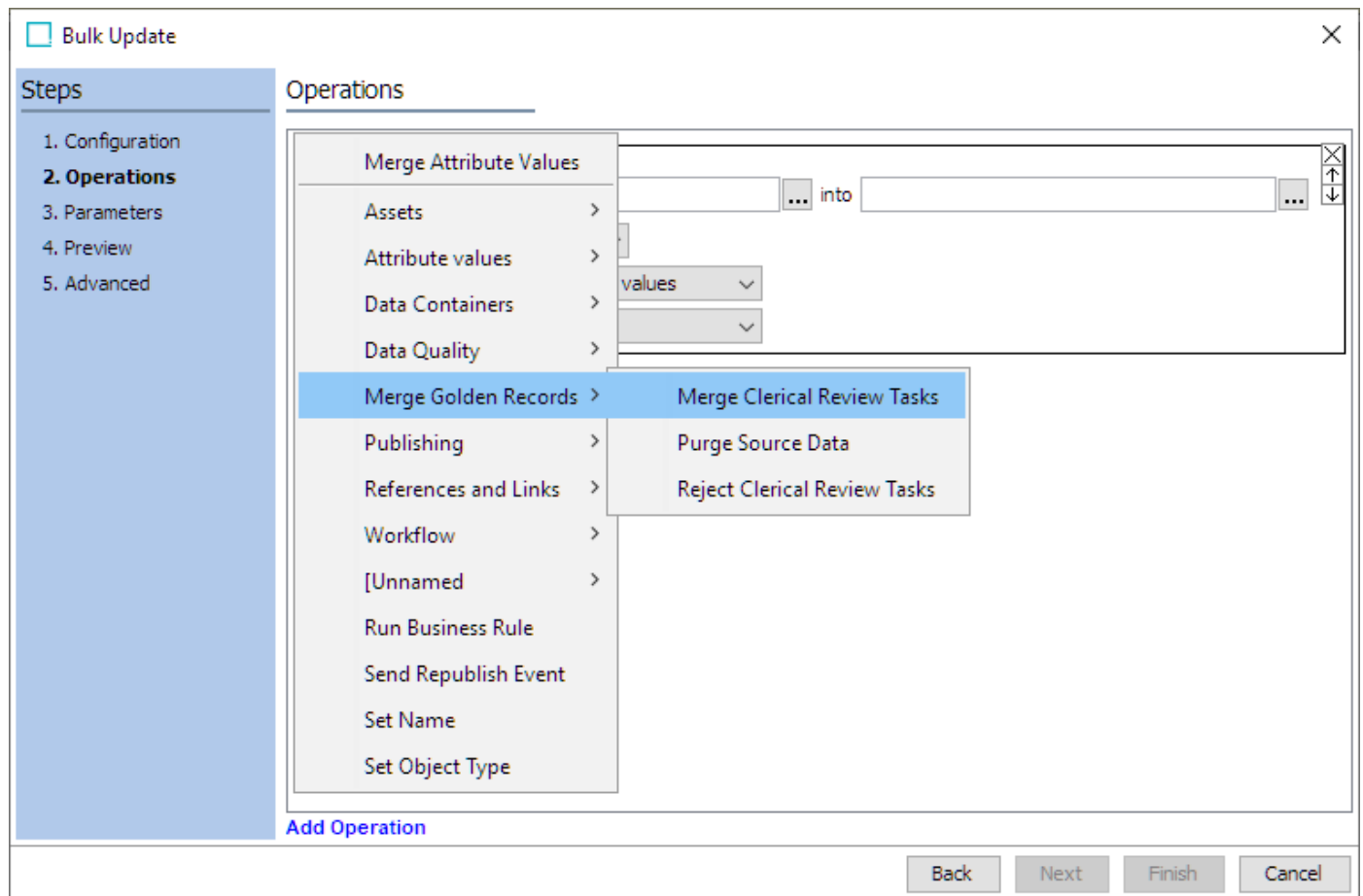
This operation is available for Merge Golden Records. For more information on a golden records merge solution, refer to the **Match and Merge** topic in the **Matching, Linking, and Merging** documentation.

This operation allows you to merge potential duplicates in a Clerical Review workflow from within the workbench.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. From the Operations dropdown, select **Merge Golden Records** and then **Merge Clerical Review Tasks**.



**Bulk Update**

**Steps**

- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

- Merge Attribute Values
- Assets
- Attribute values
- Data Containers
- Data Quality
- Merge Golden Records**
  - Merge Clerical Review Tasks**
  - Purge Source Data
  - Reject Clerical Review Tasks
- Publishing
- References and Links
- Workflow
- [Unnamed]
- Run Business Rule
- Send Republish Event
- Set Name
- Set Object Type

[Add Operation](#)

**Back** **Next** **Finish** **Cancel**

2. Use the dropdowns to select the required configurations.

☐ Bulk Update

Steps

1. Configuration  
**2. Operations**  
3. Parameters  
4. Preview  
5. Advanced

Operations

Merge Clerical Review Tasks

STEP Workflow: Individual Matching

Current State: Initial State

Add Operation

Back
Next
Finish
Cancel

- **STEP Workflow** - Select the Clerical Review workflow
- **Current State** - Select that state of the selected Clerical Review workflow

# Merge Golden Records: Purge Source Data Operation

This operation is available for Merge Golden Records. For more information on a golden records merge solution, refer to the **Match and Merge** topic in the **Matching, Linking, and Merging** documentation.

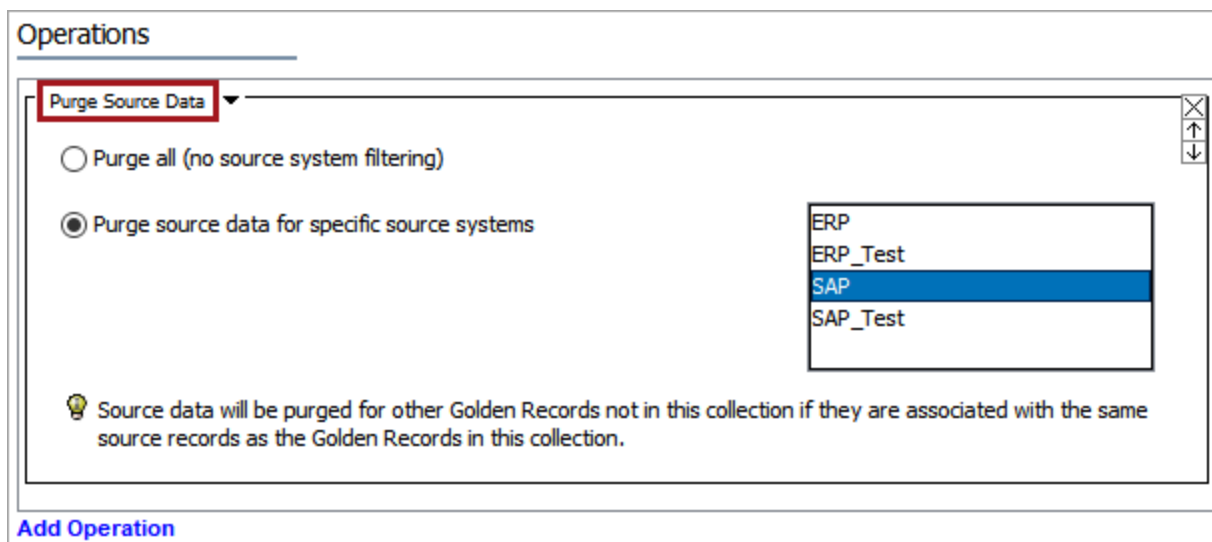
This operation allows Source Record Data for all sources or per source system to be purged for records with a current source system / record ID reference to the Golden Records.

**Important:** Source data is purged for Golden Records that are not in the collection if they are or were previously associated with the same source records as the Golden Records in the collection. This consideration applies for Golden Records and Source Records that were part of a merge or unmerge.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. From the Operations dropdown, select **Merge Golden Records** and then **Purge Source Data**.



The screenshot shows a window titled "Operations". Inside, there is a dropdown menu labeled "Purge Source Data" which is highlighted with a red box. Below the dropdown are two radio buttons: "Purge all (no source system filtering)" and "Purge source data for specific source systems". The second radio button is selected. To the right of the radio buttons is a list box containing the following items: "ERP", "ERP\_Test", "SAP" (which is highlighted in blue), and "SAP\_Test". At the bottom of the window, there is a lightbulb icon and a text box that reads: "Source data will be purged for other Golden Records not in this collection if they are associated with the same source records as the Golden Records in this collection." Below the window, there is a blue button labeled "Add Operation".

2. Select an operation radio button:
  - Purge all (no source system filtering)
  - Purge source data for specific source systems - also select the desired source systems from the dropdown.

# Merge Golden Records: Reject Clerical Review Tasks

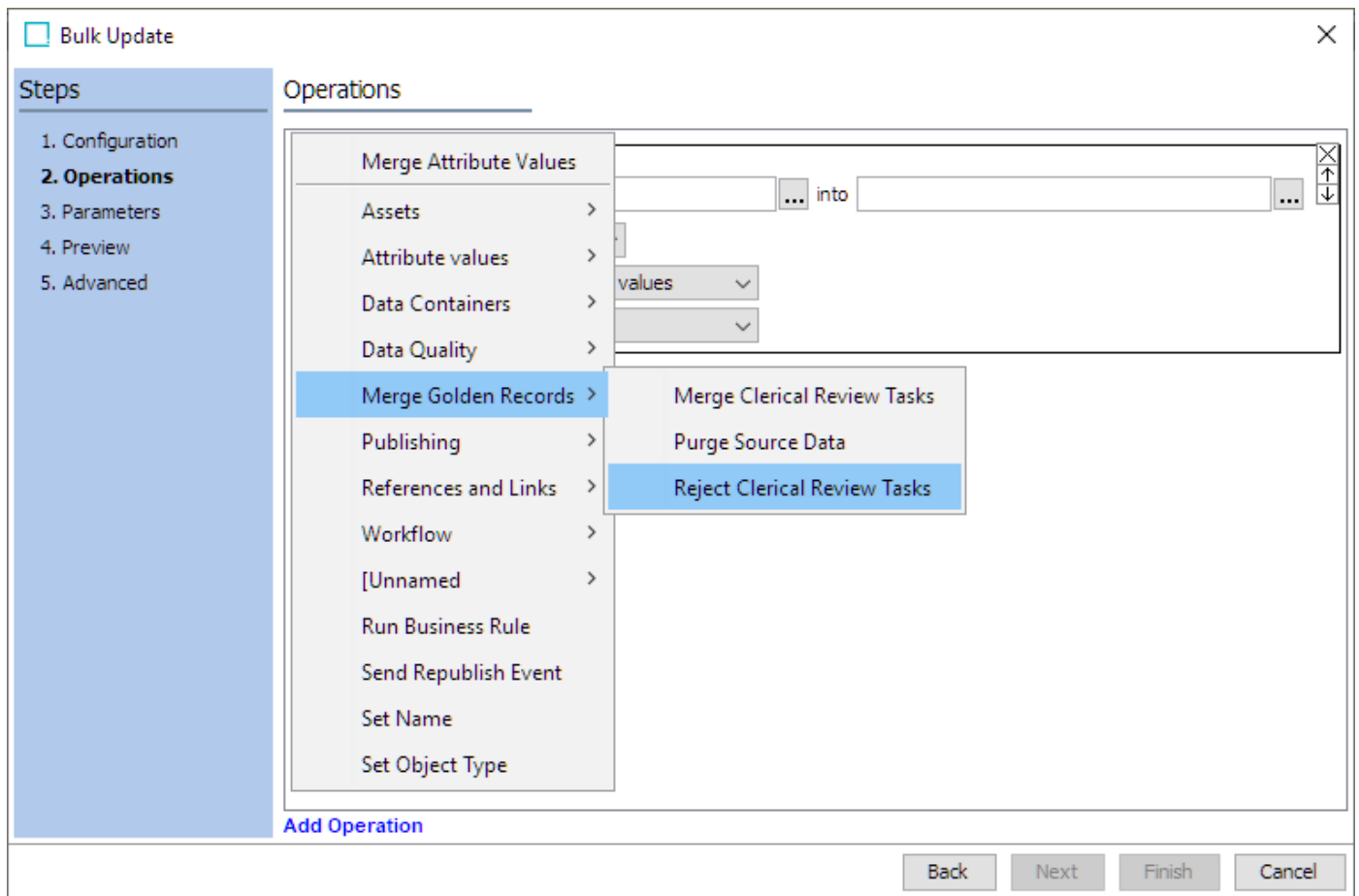
This operation is available for Merge Golden Records. For more information on a golden records merge solution, refer to the **Match and Merge** topic in the **Matching, Linking, and Merging** documentation.

This operation allows you to reject potential duplicates in a Clerical Review workflow from within the workbench.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. From the Operations dropdown, select **Merge Golden Records** and then **Reject Clerical Review Tasks**.



**Bulk Update**

**Steps**

- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

- Merge Attribute Values
- Assets >
- Attribute values >
- Data Containers >
- Data Quality >
- Merge Golden Records >**
  - Merge Clerical Review Tasks
  - Purge Source Data
  - Reject Clerical Review Tasks**
- Publishing >
- References and Links >
- Workflow >
- [Unnamed] >
- Run Business Rule
- Send Republish Event
- Set Name
- Set Object Type

[Add Operation](#)

Back Next Finish Cancel

2. Use the dropdowns to select the required configurations.

☐ Bulk Update

Steps

1. Configuration  
**2. Operations**  
3. Parameters  
4. Preview  
5. Advanced

Operations

Reject Clerical Review Tasks

STEP Workflow: Individual Matching  
Current State: Initial State

Add Operation

Back

Next

Finish

Cancel

- **STEP Workflow** - Select the Clerical Review workflow
- **Current State** - Select that state of the selected Clerical Review workflow

# Publishing: Check Publication Document for Needs Update Operation

A page will need an update if any elements mounted on the page (for example, attribute values or image references) have changed in STEP since the page was originally saved to STEP.

This operation checks all actual pages saved to the selected publication / section to determine if updates are needed.

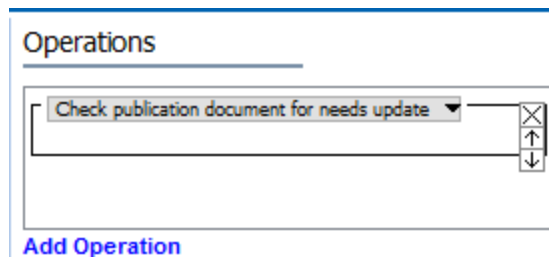
Checking documents for updates from within STEP Workbench is primarily useful for Print AutoPage and Print Flatplanner publications. Since near-identical functionality can be accessed from other locations in the workbench (including right-clicking on a publication or section object in the Tree and clicking 'Check for update needed...'), the use cases and applications for checking documents for updates are detailed in the following publishing-specific topics instead:

- **Updating Documents in AutoPage** in the **Print AutoPage** documentation
- **Updating Documents in Flatplanner** in the **Print Flatplanner** documentation

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Check Publication Document for Needs Update** from the dropdown.



2. No parameter configuration is required.

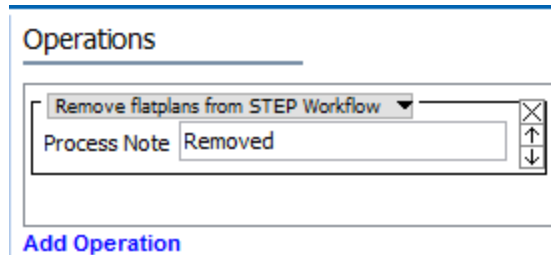
# Publishing: Remove Flatplans from STEP Workflow Operation

This operation is legacy functionality (pre-STEP 8.0) from when only one workflow at a time was allowed for planned pages. There is no ability to select a specified workflow.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Remove Flatplans from STEP Workflow** from the dropdown.



2. For the **Process Note** parameter, type a name to be used by the background process.

**Note:** If only using one Flatplanner workflow, this removes all planned pages from the workflow.

# Publishing: Start Flatplans in STEP Workflow Operation

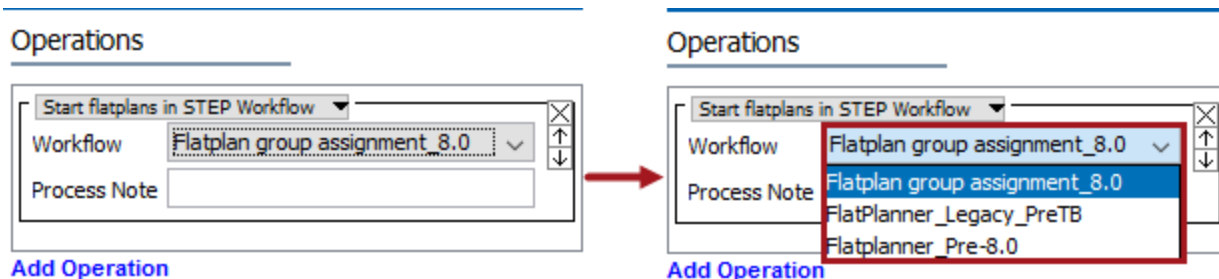
This operation adds all Flatplanner spreads (planned pages) in the selected publication group, publication, or section into the specified Flatplanner workflow. The bulk update is initiated by right-clicking on the desired publication group, publication, or section. A selection of planned pages can also be chosen for bulk initiation into a Flatplanner workflow by multi-selecting them and using to File menu, highlight the 'Bulk Update' option and then select the 'Run Bulk Update' option.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Start Flatplans in STEP Workflow** from the dropdown.
2. In the **Workflow** parameter, select the desired workflow from the dropdown.

**Note:** Only workflows valid for planned pages are displayed. Flatplans that are already in a workflow are not affected.



3. In the **Process Note** parameter, type a name for the background process.

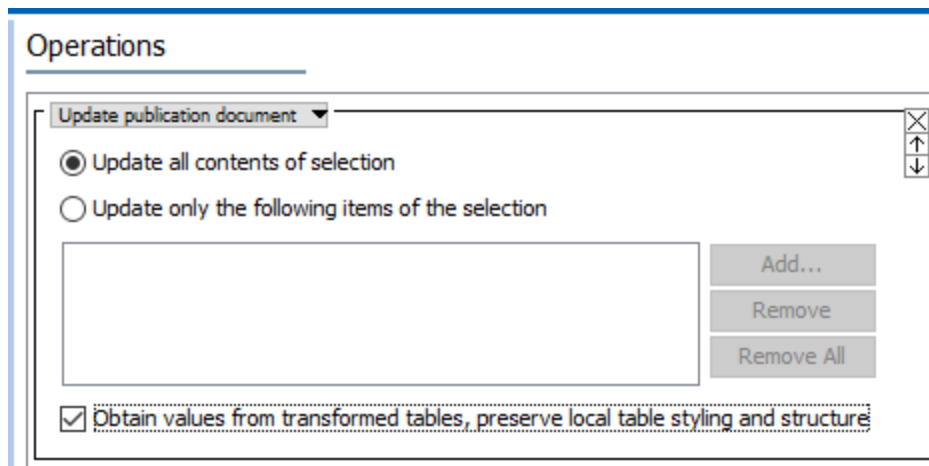
# Publishing: Update Publication Document Operation

This option functions almost identically to the **Update** feature that is directly accessed by right-clicking on publication, section, or DTP document objects in the Tree. The selections in the 'Operations' dialog pictured below are identical to those in the 'Update contents of documents' dialog that is accessed through the 'Update' feature. Because of these similarities—and because the 'Update' feature is more commonly used than the bulk update feature to update documents—this feature is detailed in the **Updating Documents From the Workbench of the Publisher (Adobe InDesign Integration)** documentation for more information.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Update Publication Document** from the dropdown.



2. Choose one of these options:
  - **Update all contents of section:** This updates all information on all actual pages saved to the selected publication, section, or DTP document.
  - **Update only the following items of the selection:** Choosing this allows for the selection of specific items to be updated on the actual pages, such as attributes, image references, and table types.

# References and Links: Add Attribute Link Operation

The selected attribute will be linked to the collection of valid objects.

- If the attribute is on an object, it can be viewed on the References tab on the object, under the 'Linked Attributes from Product Hierarchy' flipper.
- If the attribute does not have an editable field (or link) to store data, this option adds a link and allows data to be stored.

For more information on linked attributes refer to the **Attribute Links** topic in the **System Setup** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Add Attribute Link** topic in the **Business Rules** documentation.

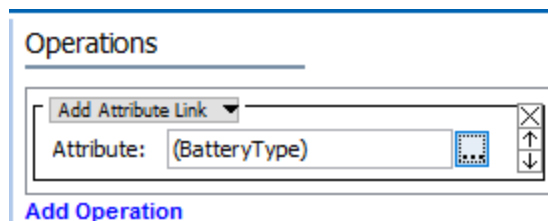
## Prerequisites

Before using this operation:

1. Ensure the product attribute link type is set up. For more information, refer to the **Product Attribute Link Type** topic in the **System Setup** documentation.
2. Ensure the selected attribute is valid on the product object type being linked.

## Configuration

1. Select **Add Attribute Link** from the dropdown.



2. In the **Attribute** parameter, click the ellipsis button (...) to display the Select Attribute dialog, select a reference type, and click the **Select** button.

## Example

The following images show before and after the 'BatteryType' Add Attribute Link bulk update is run.

Tree

Primary Product Hierarchy

Products

Apparel

Footwear

Safety

Hardware

Tools

Task Lighting

Flashlights

Flashlights Items

(111204)

20862

20883

Flashlights Items rev.0.5 - References

Images & Documents

Commercial

Tables

Category Profile

Proof View

Status

State Log

Tasks

Product

Product Variants

Sub Products

References

Referenced By

Add Index Word

Publications

ID

Name

Link to Publication or Section

Linked Attributes from Product Hierarchy

(DisplaySequence)

Completeness Score

ID

Name

(Product Variant Priority)

(Value2)

5

BatteriesIncluded

(BatteriesIncluded)

BatteryType

(BatteryType)

BrandName

(BrandName)

Tree

Primary Product Hierarchy

Products

Apparel

Footwear

Safety

Hardware

Tools

Task Lighting

Flashlights

Flashlights Items

(111204)

20862

20883

Flashlights Items rev.0.5 - References

Images & Documents

Commercial

Tables

Category Profile

Proof View

Status

State Log

Tasks

Product

Product Variants

Sub Products

References

Referenced By

Add Index Word

Publications

ID

Name

Link to Publication or Section

Linked Attributes from Product Hierarchy

(DisplaySequence)

Completeness Score

ID

Name

(Product Variant Priority)

(Value2)

5

BatteriesIncluded

(BatteriesIncluded)

BatteryType

(BatteryType)

BrandName

(BrandName)

# References and Links: Add Reference or Add Referenced By Operations

**Add Reference** and **Add Referenced By** have similar configurations for bulk updates. Performing the operation for **Add Reference** adds a reference of a specified type to a target. Alternatively, the **Add Referenced By** operation adds a reference from a target to the source.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

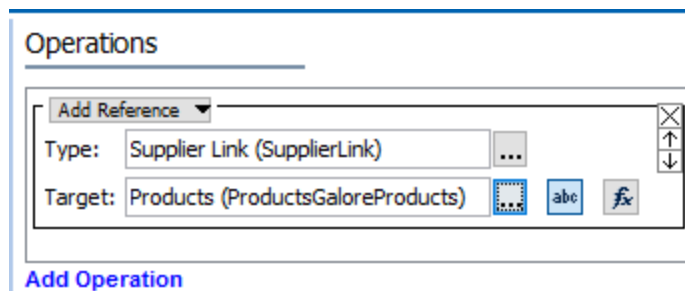
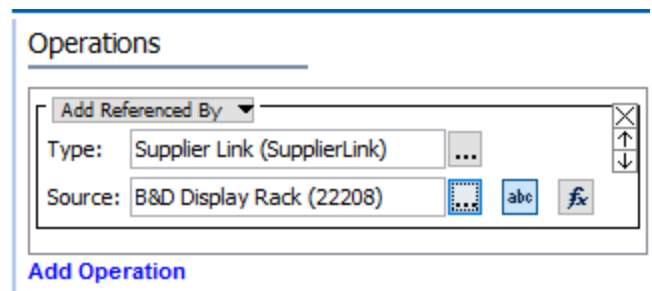
This operation can also be run via the business rules functionality, as described in the **Business Action: Add Reference** topic and the **Business Action: Add Referenced By** topic in the **Business Rules** documentation.

## Prerequisite

Before using this operation, ensure a valid reference type with the necessary source object exists, and that the source object is valid for the target object. For more information, refer to the **Reference and Link Types** topic in the **System Setup** documentation.

## Configuration

1. Select **Add Reference** or **Add Referenced By** from the dropdown.

2. For the **Type** parameter, click the ellipsis button (...), select the reference type, and click **Select**.
3. For the **Target** or **Source** parameter, use one of these methods to select the relevant target or source.

**Note:** The selected object dictates the label on the manual button. If the selected object requires a text value, the label is 'abc.' If the selected object is numeric, '123' is displayed, and so on for each validation base type.

- For manual selection, click the 'abc' button (abc), click the ellipsis button (...) to display the Select Reference Target or Select Reference Source dialog. Select a Target or Source object that is in accordance with the selected link type, and click **Select**.
- For function selection, click the function button (fx), click the ellipsis button (...) to display the Function Editor dialog. Add a function and evaluate, then click **OK**. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.

## Examples

An example using **Add Reference** is below:

The top screenshot shows the '129707 rev.0.6 - References' window. The 'Item References, Classification' table has a row for 'Supplier Link' with a red box around it. The 'Tree' on the left shows the hierarchy: Flashlights > Flashlights Items > (179901) > (179912) > 129707 > 129997.

The bottom screenshot shows the same window after clicking the 'Add Reference' button. The 'Supplier Link' row is still selected, but the 'Target' column now shows 'Suppliers/Products Galore/Products' with a red box around it. The 'Tree' on the left is the same.

Similarly, to specify a function in the function editor, a user can click the  button and then click the ellipsis button  to display the editor.

Again, an example using **Add Reference** is below though it works the same way for **Add Referenced By**:

After selecting the 'Type' of reference, a user opens the function editor and types in the function needed. In this case there is an attribute on the item called 'Product Image' that holds the ID of an image asset.

The screenshot shows the '129707 rev.0.7 - Product' window. The 'Product' tab is selected, and the 'Product Image' attribute is highlighted in the 'Description' table. The 'Value' column for 'Product Image' shows '184812'. The 'Operations' dialog box is open, showing 'Add Reference' as the operation. The 'Type' is set to 'Primary Product Image (PrimaryProductImage)' and the 'Target' is set to 'prodval("Product Image")'. A red arrow points from the 'Product Image' attribute in the table to the 'Target' field in the dialog box.

| Name          | Value                                         |
|---------------|-----------------------------------------------|
| ID            | 129707                                        |
| Name          | 129707                                        |
| Object Type   | Item                                          |
| Revision      | 0.7 Last edited by USERL on Mon Sep 12 0      |
| Approved      | Never Been Approved                           |
| Translation   | Not Translated                                |
| Parent        | Flashlights Items                             |
| Path          | Hardware   Tools   Task Lighting   Flashlight |
| Product Image | 184812                                        |

When the bulk update is run, it uses the ID in the attribute to call forth which asset to put on the Primary Product Image reference.

Tree

- Flashlights
  - Flashlights Item
    - (179901)
    - (179912)
    - 129707
    - 129997
    - 129999
    - 134852
    - 134853
    - 134855

129707 rev.0.7 - References

Category Profile
Proof View
Status
State Log
Tasks

Referenced By
Images & Documents
Commercial
Tables

Product
Sub Products
**References**

Image References

| Reference Type          | Target            | Thumbnail                                                                          |
|-------------------------|-------------------|------------------------------------------------------------------------------------|
| > Brand Name Logo +     |                   |                                                                                    |
| > Illustration +        |                   |                                                                                    |
| > Primary Product ... + | MagLiteFlashlight |  |

# References and Links: Automatic Classification Operation

This operation classifies the selected objects automatically according to a set of rules.

The Automatic Classification functionality is controlled by a component model. For more information, refer to the **Automatic Classification** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Automatic Classification** topic in the **Business Rules** documentation.

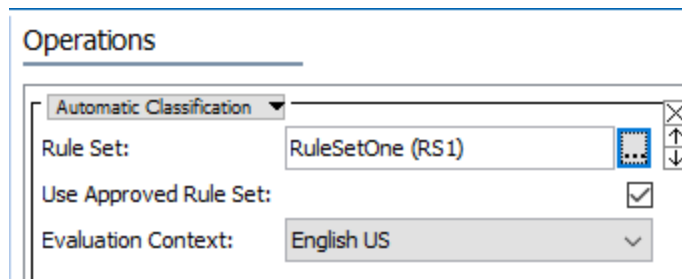
## Prerequisites

Before using this operation:

1. Ensure the Automatic Classification component is activated.
2. Ensure a rule set configuration for automatic classification exists, as defined in the **Initial Setup for Automatic Classification** topic.
3. Ensure the Rule Set object instance in Tree is configured per the component model definition.

## Configuration

1. Select **Automatic Classification** from the dropdown.



2. For the **Rule Set** parameter, click the ellipsis button (...), and select the rule set to be executed.
3. For the **Use Approved Rule Set** parameter, check the checkbox to use the approved version of the rule set.
4. For the **Evaluation Context** parameter, select the context where the action should occur.

# References and Links: Industry Classification Synchronization Operation

This operation allows users to reclassify products when adding an additional version of eCl@ss, ETIM, or UNSPSC. When executing this operation, products that have an existing link to the source classification will also get a link to the target classification, using the specified 'Product-to-Classification' link type.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Run a search for any products that need their classification links updated to a newer eCl@ss, ETIM, or UNSPSC classification hierarchy, and run the bulk update wizard.
2. Select **Industry Classification Synchronization** from the dropdown.

**Operations**

Industry Classification Synchronization ▼

Industry standard matcher: eClass

Source classification root: eClass 9.1 (eClass\_9.1) ...

Target classification root: eCl@ss 9.1.1 (eClass 9.1.1) ...

Product to classification link type: eClassSEG (eClassSEG) 

3. In the **Industry standard matcher** parameter, select the relevant industry standard from the dropdown list.
4. In the **Source classification root** parameter, click the ellipsis button (...), select the classification root node for the original industry classification version, and click **Select**.
5. In the **Target classification root** parameter, click the ellipsis button (...), select the classification root node for the new industry classification version, and click **Select**.
6. In the **Product to classification link type** parameter, click the ellipsis button (...), select the product to classification link type the products use to link into the classification hierarchy, and click **Select**.

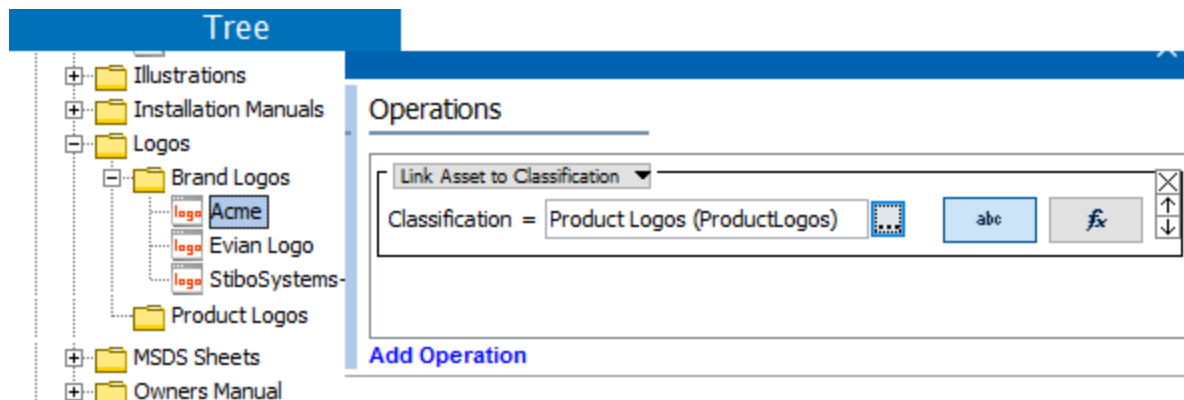
# References and Links: Link Asset to Classification Operation

This operation allows users to link assets to a specified classification.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select the assets that need to be linked, and run the bulk update wizard.
2. Select **Link Asset to Classification** from the dropdown.

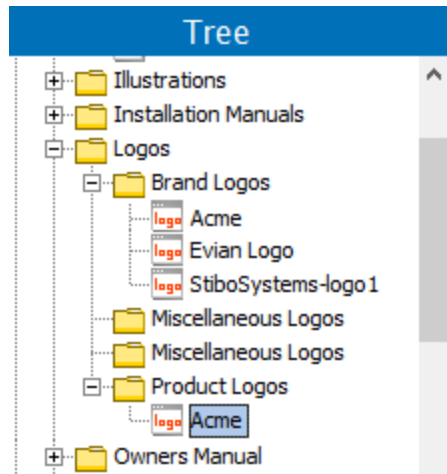


3. In the **Classification** parameter, use one of these methods to select the relevant classification.

**Note:** The selected object dictates the label on the manual button. If the selected object requires a text value, the label is 'abc.' If the selected object is numeric, '123' is displayed, and so on for each validation base type.

- For manual selection, click the 'abc' button (abc), and click the ellipsis button (...) to display the Select Classification dialog. Select a classification object and click **Select**.
- For function selection, click the 'fx' button (fx), click the ellipsis button (...) to display the Function Editor dialog. Add a function and evaluate, then click **OK**. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.

Once the bulk update runs, assets appear under designated classification folder.



# References and Links: Remove Attribute Link Operation

This operation removes the selected link to an attribute when the selected object is linked to the attribute.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

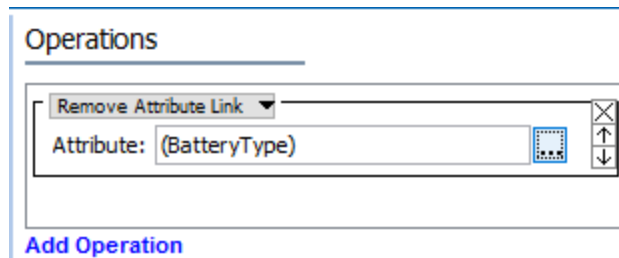
This operation can also be run via the business rules functionality, as described in the **Business Action: Remove Attribute Link** topic in the **Business Rules** documentation.

## Prerequisite

Before using this operation, ensure the valid attribute is linked to the product. For more information, refer to the **Product Attribute Link Type** topic in the **System Setup** documentation.

## Configuration

1. Select **Remove Attribute Link** from the dropdown.



2. For the **Attribute** parameter, click the ellipsis button (...) to display the Select Attribute dialog, choose the attribute that should be removed and click the **Select** button.

## Example

The following images show before and after the 'BatteryType' Remove Attribute Link bulk update is run.

Tree

Primary Product Hierarchy

Products

Apparel

Footwear

Safety

Hardware

Tools

Task Lighting

Flashlights

Flashlights Items

(111204)

20862

20883

Flashlights Items rev.0.5 - References

Images & Documents

Commercial

Tables

Category Profile

Proof View

Status

State Log

Tasks

References

Referenced By

Add Index Word

Publications

ID > Name >

Link to Publication or Section

Linked Attributes from Product Hierarchy

(DisplaySequence) > Completeness Score > ID > Name > (Product Variant Priority) > (Value2)

> BatteriesIncluded (BatteriesIncluded)

> BatteryType (BatteryType)

> 5 BrandName (BrandName)

Tree

Primary Product Hierarchy

Products

Apparel

Footwear

Safety

Hardware

Tools

Task Lighting

Flashlights

Flashlights Items

(111204)

20862

20883

Flashlights Items rev.0.5 - References

Images & Documents

Commercial

Tables

Category Profile

Proof View

Status

State Log

Tasks

References

Referenced By

Add Index Word

Publications

ID > Name >

Link to Publication or Section

Linked Attributes from Product Hierarchy

(DisplaySequence) > Completeness Score > ID > Name > (Product Variant Priority) > (Value2)

> BatteriesIncluded (BatteriesIncluded)

> BatteryType (BatteryType)

> 5 BrandName (BrandName)

# References and Links: Remove Reference Operation

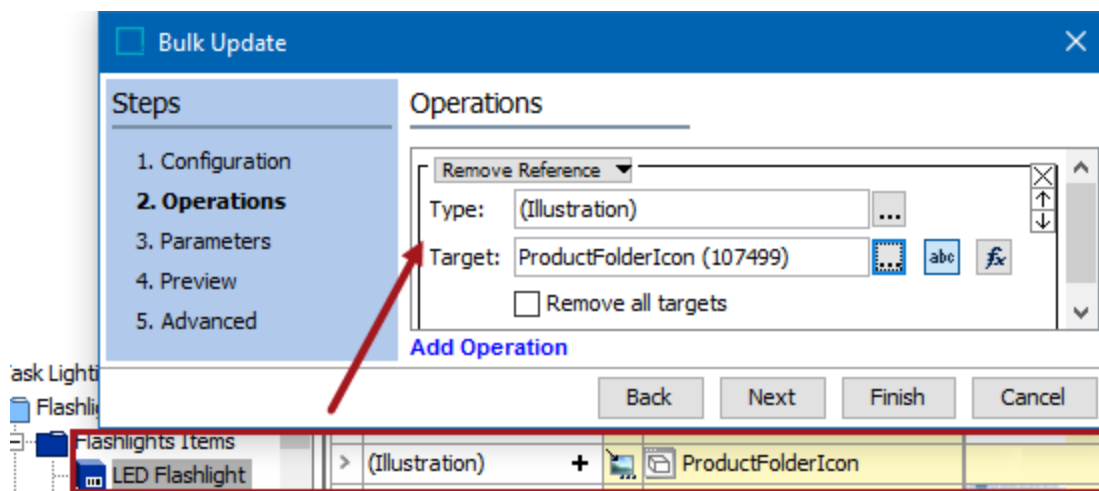
This operation removes references to a specific target or all references of a specific type.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Remove Reference** topic in the **Business Rules** documentation.

## Configuration

1. Select **Remove Reference** from the dropdown.



2. For the **Type** parameter, click the ellipsis button (...) to display the Select Reference Type dialog, choose the reference type that should be removed and click the **Select** button.
3. For the **Target** parameter, use one of these methods to select the relevant target. Leave this parameter blank to remove all references of a specific type without limiting removal to a node. The target must be in accordance with the selected type, otherwise an error is displayed.
  - Click the 'abc' button (abc), click the ellipsis button (...) to display the Select Reference Target picker, select a valid target, and click the **Select** button.
  - Click the 'fx' button (fx), click the ellipsis button (...) to display the Function Editor dialog, write a function to select a valid target, and click the **Select** button. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.
4. For the **Remove all targets** parameter, set the checkbox as follows:
  - Unchecked means references of the specified type are removed from the modified objects.
  - Checked with a blank Target parameter means all references of the specified type are removed from the modified objects.

**Operations**

Remove Reference

Type: (Illustration) ...

Target: ... abc

☒ Remove all targets

Add Operation

## Example

The 'Product Image' attribute on the item holds the ID of an image asset.

**Tree**

- Task Lighting
  - Flashlights
    - Flashlights Items
      - (179901)
      - (179912)
      - 129707
      - 129997
      - 129999
      - 134852
      - 134853
      - 134855
      - 134856
      - 134857
      - 134858

**129707 rev.0.7 - Product**

Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

**Product** | Sub Products | References | Referenced By | Images & Documents

Description

| Name          | Value            |
|---------------|------------------|
| ID            | 129708           |
| Name          | 129707           |
| Object Type   | Item             |
| Revision      | 0.7 Last edited  |
| Approved      | Never Been       |
| Translation   | Not Translated   |
| Parent        | Flashlights Item |
| Path          | Hardware   Tool  |
| Product Image | 184812           |

**Operations**

Remove Reference

Type: Product Image (ProductImage) ...

Target: prodval("Product Image") ... abc

☐ Remove all targets

When the bulk update runs, it uses function to determine the value of the attribute, to find which reference to remove from the Product Image type.

**Tree**

- Task Lighting
  - Flashlights
    - Flashlights Items
      - (179901)
      - (179912)
      - 129707**
      - 129997
      - 129999
      - 134852
      - 134853

**129707 rev.0.7 - References**

Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Sub Products | **References** | Referenced By | Images & Documents

**Image References**

| Reference Type          | Target            | Thumbnail                                                                           |
|-------------------------|-------------------|-------------------------------------------------------------------------------------|
| > Brand Name Logo +     |                   |                                                                                     |
| > Illustration +        |                   |                                                                                     |
| > Primary Product ... + |                   |                                                                                     |
| > Product Image +       | MagLiteFlashlight |  |

**Tree**

- Iware
- Tools
  - Task Lighting
    - Flashlights
      - Flashlights Items
        - (179901)
        - (179912)
        - 129707**
        - 129997
        - 129999

**129707 rev.0.7 - References**

Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Sub Products | **References** | Referenced By | Images & Documents

**Image References**

| Reference Type          | Target | Thumbnail |
|-------------------------|--------|-----------|
| > Brand Name Logo +     |        |           |
| > Illustration +        |        |           |
| > Primary Product ... + |        |           |
| > Product Image +       |        |           |

# References and Links: Set Product to Classification Link Type Operation

This assigns a new object type and a classification link type to the selected classifications.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Set Product to Classification Link Type** topic in the **Business Rules** documentation.

## Prerequisites

1. Ensure a valid Classification Link Type and the Target Classification Object Type exists. For more information, refer to the **Reference and Link Types** topic in the **System Setup** documentation.
2. Ensure a valid classification object type should be linked to the same parent classification of the object type being changed to.
3. Classification Link Type should have the object type valid.

## Configuration

1. Select **Set Product to Classification Link Type** from the dropdown.

2. In the **New Object Type** parameter, click the ellipsis button (...) to display the Select Object Type dialog, select the classification, and click the **Select** button.
3. In the **New Link Type** parameter, click the ellipsis button (...) to display the Select Product to Classification Link Type dialog, select the link type, and click the **Select** button. The target must comply with the selected type. If the link type does not match the object type selected, an error message displays.

## Example

In the following example data, Website1 object type is valid for the 'WebHierarchyRoot', but will be changed to be valid for 'MerchandisingHierarchyRoot.'

**System Setup**

- UNSPSC
- UNSPSC14
- UNSPSC18
- Web Hierarchy Root**
  - WebsiteRoot
  - ClassWeb
  - WebLevel1
  - WebLevel2
  - WebLevel3
- Assets
- Basic Object Types

**Object Type** | **References** | **Log**

Objects of this Object Type

| ID               | Name         |
|------------------|--------------|
| Website1         | Website 1    |
| WebHierarchyRoot | Web Sites US |

Parents

| ID                              | Name            |
|---------------------------------|-----------------|
| Classification 1 user-type root | Alternate Class |

[Add Parent](#)

**System Setup**

- Alternate Classifications
  - All Suppliers
  - Alternate Classifications
  - AssetRoot
  - Configurations Root
  - eClass Folder
  - ETIM6 Article Groups Type
  - ETIM Article Groups Type
  - GPC Root
  - Index
  - Lookup Table Root
  - Merchandising Hierarchy Root**
  - Department

**Object Type** | **References** | **Log**

Objects of this Object Type

| ID                         | Name            |
|----------------------------|-----------------|
| MerchandisingHierarchyRoot | Merchandising t |
| MerchandisingHierarchy1    | Merchandising t |

Parents

| ID                              | Name            |
|---------------------------------|-----------------|
| Classification 1 user-type root | Alternate Class |

[Add Parent](#)

The items under the WebHierarchyRoot with the Website Link are now going to be of the object type 'Merchandising Hierarchy Root' with the MerchandisingLink type.

**Tree**

- Assets
- Classifications
  - Office Documents
  - TOOfficeDoc
  - Merchandising Hierarchy 1
  - Website 1**
- Configurations
- eClass 8.0
- eClass 9.1.0
- ETIM 5 Article Groups
- ETIM 6 Article Groups
- GPC
- Index Words
- Merchandising Hierarchy
- Suppliers

**Classification** | **Sub Products** | **References** | **Referenced By** | **Images & Documents**

Description

| Name | Value     |
|------|-----------|
| ID   | Website 1 |

☐ Bulk Update

| Steps             | Preview                                                                                                                                                                                                                                                                                      |                                                                      |     |     |           |                                                      |                                                                      |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-----|-----|-----------|------------------------------------------------------|----------------------------------------------------------------------|
| 1. Configuration  |                                                                                                                                                                                                                                                                                              |                                                                      |     |     |           |                                                      |                                                                      |
| 2. Operations     |                                                                                                                                                                                                                                                                                              |                                                                      |     |     |           |                                                      |                                                                      |
| 3. Parameters     |                                                                                                                                                                                                                                                                                              |                                                                      |     |     |           |                                                      |                                                                      |
| <b>4. Preview</b> | <table border="1"> <thead> <tr> <th>Object</th> <th>Old</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Website 1</td> <td>ObjectType=Web Hierarchy Root, LinkType=Website Link</td> <td>ObjectType=Merchandising Hierarchy Root, LinkType=Merchandising Link</td> </tr> </tbody> </table> | Object                                                               | Old | New | Website 1 | ObjectType=Web Hierarchy Root, LinkType=Website Link | ObjectType=Merchandising Hierarchy Root, LinkType=Merchandising Link |
| Object            | Old                                                                                                                                                                                                                                                                                          | New                                                                  |     |     |           |                                                      |                                                                      |
| Website 1         | ObjectType=Web Hierarchy Root, LinkType=Website Link                                                                                                                                                                                                                                         | ObjectType=Merchandising Hierarchy Root, LinkType=Merchandising Link |     |     |           |                                                      |                                                                      |
| 5. Advanced       |                                                                                                                                                                                                                                                                                              |                                                                      |     |     |           |                                                      |                                                                      |

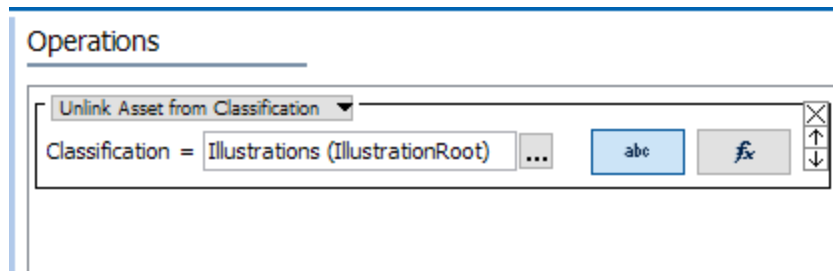
# References and Links: Unlink Asset from Classification Operation

Using this operation, selected assets are unlinked from the specified classification.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Unlink Asset from Classification** from the dropdown.



2. For the **Classification** parameter, use one of these methods to select the relevant classification.

**Note:** The selected object dictates the label on the manual button. If the selected object requires a text value, the label is 'abc.' If the selected object is numeric, '123' is displayed, and so on for each validation base type.

- For manual selection, click the 'abc' button (abc), and click the ellipsis button (...) to display the Select Classification dialog. Select a classification object where the assets will be unlinked and click **Select**.
- For function selection, click the 'fx' button (fx), click the ellipsis button (...) to display the Function Editor dialog. Add a function and evaluate, then click **OK**. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.

## Examples

Using the setting displayed in the image above, the operation is run on the data shown below. The preview shows that the IllustrationRoot classification reference will be removed.

**Tree**

- Assets
  - Icons
    - BlueTruckIcon
    - Product
    - TruckIcon**
  - Illustrations
    - Pens
    - ProductFolderIcon
    - ProductIcon
    - STEPReferencesTab
    - TruckIcon
  - Installation Manuals
  - Logos
  - MSDS Sheets
  - Owners Manual
  - Product Images
  - Product Videos
- Classifications
- Configurations

**TruckIcon rev.0.1 - References**

Images & Documents | **References** | Referenced By | Status | State Log | Tasks

**Classifications**

| ID                 | Name          | Object Type   | Revision        |
|--------------------|---------------|---------------|-----------------|
| > IconRoot         | Icons         | Icons         | 0.2 Last edited |
| > IllustrationRoot | Illustrations | Illustrations | 0.1 Last edited |

[Link to Classification](#)

**Bulk Update**

☐ Bulk Update

**Steps**

1. Configuration
2. Operations
3. Parameters
- 4. Preview**
5. Advanced

**Preview**

| Object      | Unlink Asset from Classification |
|-------------|----------------------------------|
| > TruckIcon | Old: 2 links<br>New: 1 links     |

Back | **Next** | Finish | Cancel

Another example uses the following product and a function to determine the link being removed. The 'Asset Keywords' attribute on the 'BlueTruckIcon' item holds the ID of the classifications folder. In this case, the reference to 'BlueTruckIcon' should be removed from the Illustrations classification folder.

**Tree**

- Assets
  - Icons
    - BlueTruckIcon**
    - Product
    - TruckIcon
  - Illustrations
    - BlueTruckIcon
    - Pens
    - ProductFolderIcon
    - ProductIcon
    - STEPReferencesTab
  - Installation Manuals
  - Logos
  - MSDS Sheets
  - Owners Manual
  - Product Images

**References**

Images & Documents | **References** | Referenced By | Status | State Log

**Description**

| Name             | Value                                                  |
|------------------|--------------------------------------------------------|
| > ID             | 120833                                                 |
| > Name           | BlueTruckIcon                                          |
| > Object Type    | Icon                                                   |
| > Revision       | 0.6 Last edited by USERL on Mon Nov 21 11:41:19 EST 20 |
| > Approved       | ✗ Last Approved on Tue Sep 13 11:58:54 EDT 2016        |
| > Translation    | Not Translated                                         |
| > Path           | Classification 1 root/Assets/Icons/BlueTruckIcon       |
| > Content In     | Language=Language Root, Country=Country Root           |
| > Asset Keywords | abc IllustrationRoot                                   |

The **Prodval("Asset Keywords")** function is used to remove the classification link by getting the value of the attribute that holds the ID of the link to be removed.

Operations

Unlink Asset from Classification

Classification = 

Prodval("Asset Keywords")

...

abc

Once completed, the asset is no longer linked to the Illustrations classification folder.

Tree

Assets

Icons

BlueTruckIcon

Product

TruckIcon

Illustrations

Pens

ProductFolderIcon

ProductIcon

STEPReferencesTab

BlueTruckIcon rev.0.

Images & Documents

References

Referenced By

Status

State Log

Tasks

Classifications

| ID                                     | Name  | Object Type |
|----------------------------------------|-------|-------------|
| IconRoot                               | Icons | Icons       |
| LogoRoot                               | Logos | Logos       |
| <a href="#">Link to Classification</a> |       |             |

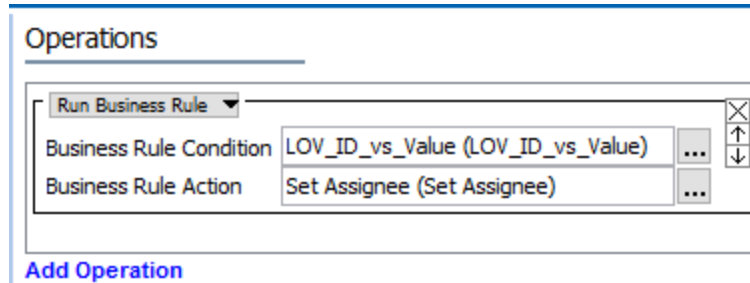
# Run Business Rule Operation

This operation runs a business condition and/or action on the selected objects.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Configuration

1. Select **Run Business Rule** from the dropdown.



**Operations**

Run Business Rule ▼

Business Rule Condition: LOV\_ID\_vs\_Value (LOV\_ID\_vs\_Value) ...

Business Rule Action: Set Assignee (Set Assignee) ...

[Add Operation](#)

2. For the 'Business Rule Condition' parameter, if a condition should be run, click the ellipsis button (...), select the condition, and click **Select**. If the condition evaluates to 'true', the selected business action will run.
3. For the 'Business Rule Action' parameter, click the ellipsis button (...), select the action, and click **Select**. If the action should always run, no condition should be selected.

# Send Republish Event Operation

This option performs the same operation as selecting 'Republish' on a receiving processor. A republish event is sent to the event queue of the selected processor for all objects selected for the bulk update.

For more on republishing, refer to the **Event-Based OIEP Event Actions** topic in the **Outbound Integration Endpoints** section of the **Data Exchange** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

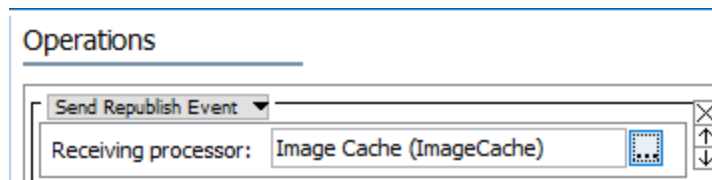
This operation can also be run via the business rules functionality, as described in the **Business Action: Send Republish Event** topic in the **Business Rules** documentation.

## Prerequisite

Before using this operation, ensure the event queue is enabled and set to Read Events as defined in the **Maintaining Event Queues** topic of the **Business Rules** documentation.

## Configuration

1. Select **Send Republish Event** from the dropdown.



2. For the **Receiving Processor** parameter, click the ellipsis button (...) to display the Select Processor for Events dialog, choose an OIEP or Event Processor that has an event queue, or choose an actual event queue object. Click the **Select** button.

This can be an event processor, outbound integration endpoint with an event queue, or an event queue directly.

## Example

For example, in the images below, the 'Item Attribute Change' OIEP is selected as the receiving processor. It has no events ready to process. Running this bulk update operation adds an event to the OIEP.

### System Setup

- Delete LOV
- Delete Prod Ref redo
- Delete Product References
- DimDepLOV
- Downstream Data\_Event-base
- Downstream Data\_Object-Bas
- EmptyValues
- Event Processor
- Item Attribute Change**
- LOV Definitions
- LOV Value Update On Prods
- Ma
- Mo
- OIE
- Ou
- Put
- Put
- RE
- Sel
- Ter
- Use

## Item Attribute Change - Configuration

Background Processes
Statistics
Error Log Excerpts
Log
Status

Outbound Integration Endpoint
**Configuration**
Event Triggering Definitions

Event Actions:
Forward
Rewind
Purge
Republish

|                                                   |                         |
|---------------------------------------------------|-------------------------|
| > Days to retain events                           | 0                       |
| > Number of events to batch                       | 1000                    |
| > Number of event batches to include per delivery | 1                       |
| > Queue Status                                    | Read Events             |
| > Unread events (approximated)                    | 0 (2016-09-13 12:37:37) |

☐ Bulk Update

### Steps

1. Configuration
- 2. Operations**
3. Parameters
4. Preview
5. Advanced

### Operations

Send Republish Event

Receiving processor: Item Attribute Change (ItemAttributeChange)

Add Operation



### System Setup

- Delete LOV
- Delete Prod Ref redo
- Delete Product References
- DimDepLOV
- Downstream Data\_Event-base
- Downstream Data\_Object-Bas
- EmptyValues
- Event Processor
- Item Attribute Change**
- LOV Definitions
- LOV Value Update On Prods
- Matchcodeprocess
- Mongo1

## Item Attribute Change - Configuration

Background Processes
Statistics
Error Log Excerpts
Log
Status

Outbound Integration Endpoint
**Configuration**
Event Triggering Definitions

Event Queue Configuration

Event Actions:
Forward
Rewind
Purge
Republish
Skip All Events

|                                                   |                         |
|---------------------------------------------------|-------------------------|
| > Days to retain events                           | 0                       |
| > Number of events to batch                       | 1000                    |
| > Number of event batches to include per delivery | 1                       |
| > Queue Status                                    | Read Events             |
| > Unread events (approximated)                    | 1 (2016-09-13 12:34:46) |

Edit Configuration

# Set Name Operation

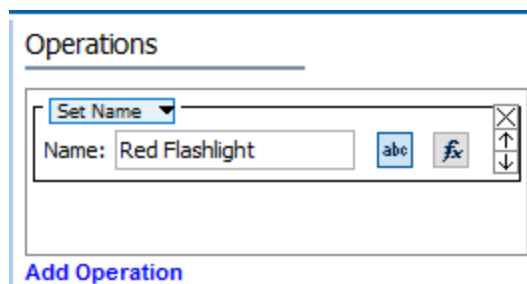
This operation sets the name of the object on which the bulk update is run. A user can either enter the name manually, or specify a function in the Function editor for naming the object.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Set Name** topic in the **Business Rules** documentation.

## Configuration

1. Select **Set Name** from the dropdown.



2. In the **Name** parameter, use one of these methods to set the relevant name.
  - For manual selection, click the 'abc' button (abc), type in a constant value that will be used to update the name.
  - For function selection, click the 'fx' button (fx), then click the ellipsis button (...) to display the Function Editor dialog. Write a function to set a name and click the **Select** button. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.

## Example

To create a name using the function editor, often attribute values on an item are concatenated. In the image below, the 'Primary Color' and 'Brand Name' attributes will be combined to create the name of this flashlight.

| 129707 rev.0.7 - Product     |              |                                                          |
|------------------------------|--------------|----------------------------------------------------------|
| Product                      | Sub Products | References                                               |
| Name                         | >            | Value                                                    |
| > ID                         |              | 129708                                                   |
| > Name                       |              | 129707                                                   |
| > Object Type                |              | Item                                                     |
| > Revision                   |              | 0.7 Last edited by USERL on Mon Sep 12 14:59:21 EDT 2016 |
| > Approved                   |              | ✖ Never Been Approved                                    |
| > Translation                |              | Not Translated                                           |
| Category Specific Attributes |              |                                                          |
| Name                         | >            | Value                                                    |
| > Batteries Included         |              | Yes                                                      |
| > Primary Color              |              | Black                                                    |
| Item Brand Information       |              |                                                          |
| Name                         | >            | Value                                                    |
| > Brand Owner                | abc          | Beaming Glow Inc                                         |
| > Brand Name                 | abc          | Beaming Glow Light                                       |

Using the Concatenate function, the value from two attributes make a name for this flashlight item.

| Operations                                                                                  |         |                                                          |
|---------------------------------------------------------------------------------------------|---------|----------------------------------------------------------|
| <div> Set Name Name: Concatenate(Prodval("PrimaryColor"), " ", Prodval("BrandName")) </div> |         |                                                          |
| Add Operation                                                                               | Product | Sub Products                                             |
| Description                                                                                 |         |                                                          |
| Name                                                                                        | >       | Value                                                    |
| > ID                                                                                        |         | 129708                                                   |
| > Name                                                                                      |         | Black Beaming Glow Light                                 |
| > Object Type                                                                               |         | Item                                                     |
| > Revision                                                                                  |         | 0.7 Last edited by USERL on Mon Sep 12 15:26:17 EDT 2016 |

# Set Object Type Operation

This operation changes the object type of the object on which the bulk update is run. The selected object type must be valid under the parent of the current object.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

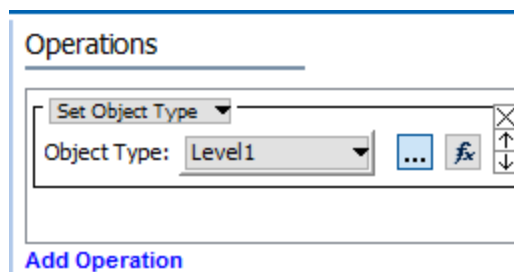
This operation can also be run via the business rules functionality, as described in the **Business Action: Set Object Type** topic in the **Business Rules** documentation.

## Prerequisite

Before using this operation, ensure the objects being modified are valid for the new object type.

## Configuration

1. Select **Set Object Type** from the dropdown.



2. In the **Object Type** parameter, use one of these methods to set the relevant object type.
  - For manual selection, click the dropdown to display the available object types in your system. Choose an item from the dropdown.  
  
When available, you can choose the **Other...** option to display the Choose Object Type dialog. Then use the Browse or Search tabs to select an object type and click the **Select** button.
  - For function selection, click the 'fx' button (fx), then click the ellipsis button (...) to display the Function Editor dialog and write a calculation to select an object type. Click the **OK** button to save the function. For more information, refer to the **Using Function Editor** topic in the **Resource Materials** online help.

## Example

The example below, 'Attribute C' on the item holds the ID of an object type.

**Tree**

- Publications
  - Primary Product Hierarchy
    - Products
      - Apparel
      - Footwear
      - Safety
      - Hardware
        - Tools
          - Task Lighting
          - Flashlights
            - Flashlight Camping
          - Anvils
          - Drills
          - High Quality Drills
        - Doors and Doorknobs
      - Displays
      - Furniture
      - Automotive
      - Building Products

**Flashlight Camping rev.0.1 - Product**

**Product** | References | Referenced By | Images & Documents | Commercial | Tables | Proof View | Status | State Log | Tasks

**Description**

| Name        | Value              |
|-------------|--------------------|
| ID          | FlashlightCamping  |
| Name        | Flashlight Camping |
| Object Type | Fl-Item            |
| Revision    | 0.1 Last           |
| Approved    | Never              |
| Translation | Not Translated     |
| Path        | Primary            |

**Bulk Update**

**Steps**

1. Configuration
2. Operations
3. Parameters
4. Preview
5. Advanced

**Operations**

Set Object Type

Object Type: prodval("Attribute1")

**Add Operation**

Back Next Finish Cancel

**Attribute Group**

| Name        | Value |
|-------------|-------|
| Attribute C | Item  |

When the bulk update runs, it uses the value in the attribute to determine the object type.

**Tree**

- Publications
  - Primary Product Hierarchy
    - Products
      - Apparel
      - Footwear
      - Safety
      - Hardware
        - Tools
          - Task Lighting
          - Flashlights
            - Flashlight Camping
          - Anvils
          - Drills
          - High Quality Drills
        - Doors and Doorknobs
      - Displays
      - Furniture
      - Automotive
      - Building Products

**Flashlight Camping rev.0.1 - Product**

**Product** | References | Referenced By | Images & Documents | Commercial | Tables | Proof View | Status | State Log | Tasks

**Description**

| Name        | Value                                                    |
|-------------|----------------------------------------------------------|
| ID          | FlashlightCamping                                        |
| Name        | Flashlight Camping                                       |
| Object Type | Item                                                     |
| Revision    | 0.1 Last edited by USERL on Tue Sep 13 10:38:39 EDT 2016 |
| Approved    | Never Been Approved                                      |

# Workflow: Claim Operation

Workflow tasks are assigned to user groups where individual users in those groups can then claim the task for themselves. A user can use the Claim operation to claim a number of tasks at once based on workflow and state.

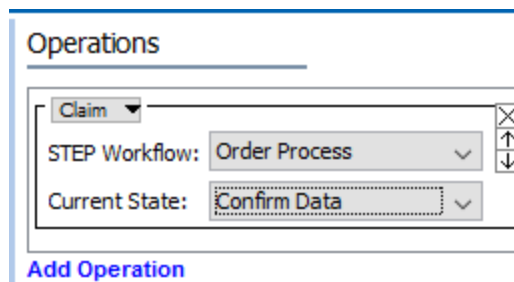
For more information on claiming bulk updates in workflows refer to the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Claim** topic in the **Business Rules** documentation.

## Configuration

1. Select **Claim** from the dropdown.



The screenshot shows a configuration window titled "Operations". Inside, there is a dropdown menu with "Claim" selected. Below this, there are two more dropdown menus: "STEP Workflow" with "Order Process" selected, and "Current State" with "Confirm Data" selected. To the right of these dropdowns are small icons for deleting (X), moving up (↑), and moving down (↓). At the bottom left of the window is a blue button labeled "Add Operation".

2. For the **STEP Workflow** parameter, select the relevant workflow from the dropdown.
  3. For the **Current State** parameter, from the dropdown, select from the available states for the workflow.
- When the bulk update runs, all tasks in the selected workflow with the selected state are claimed for the user.

# Workflow: Initiate Items in STEP Workflow Operation

This operation initiates the bulk update objects into the selected workflow, assuming that the objects selected are valid for the workflow.

For more information on initiating items in a STEP Workflow via bulk updates refer to the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

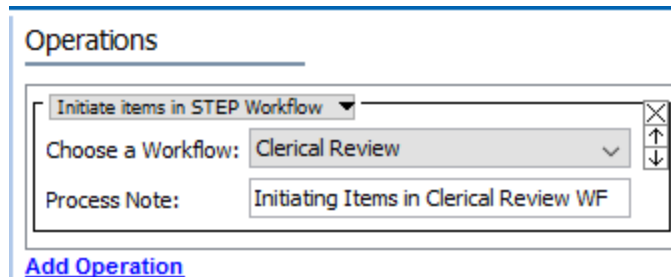
For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Prerequisite

Before using this operation, ensure the workflow exists, and the object is valid for the workflow.

## Configuration

1. From the dropdown, select the Workflow group and then select the **Initiate Items in STEP Workflow** option.



2. For the **Choose a Workflow** parameter, select a workflow from the dropdown.
3. For the **Process Note** parameter, type a note for the background process.

# Workflow: Reassign

This operation allows the user to reassign workflow tasks to another user.

For more on triggering STEP Workflow events, the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

## Prerequisites

Before using this operation:

1. Ensure the workflow exists including states and events.
2. Ensure the node is present in the state defined in the operation.
3. Identify the user or group that will be assigned the tasks.

## Configuration

- **STEP Workflow** - From the dropdown select the relevant workflow with tasks to be reassigned.
- **Current State** - From the dropdown select the relevant state. All tasks in the selected state on the specified workflow will be reassigned to the user or group chosen below.
- **User/Group** - Click the ellipsis button (...) or type an ID to display a list of suggested matches and select the desired user / user group.

### Operations

Reassign

STEP Workflow: Insufficient Data
Current State: Needs More Information
User/Group: user3 (USER3)

Add Operation

# Workflow: Remove Items from STEP Workflow Operation

This operation removes all objects from one state in a workflow.

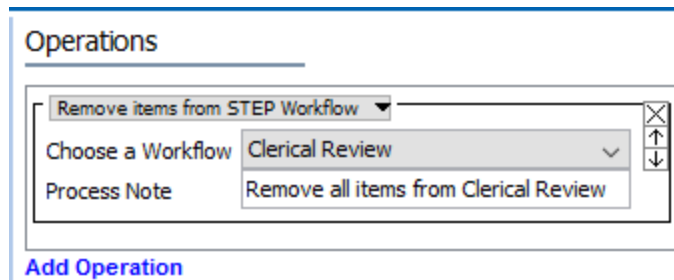
For more on how to remove items from STEP Workflows using bulk updates, refer to the **Remove Objects From Workflows** topic in the **Workflows** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation is similar to one in the business rules functionality, as described in the **Business Action: Remove Object from STEP Workflow** topic in the **Business Rules** documentation.

## Configuration

1. Select **Remove Items from STEP Workflow** from the dropdown.



2. For the **Choose a Workflow** parameter, select the workflow from the dropdown.
3. For the **Process Note** parameter, type a note for the background process.

# Workflow: Trigger STEP Workflow Event Operation

This operation allows a user to move a task from one state to another state.

For more on triggering STEP Workflow events, the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

For more information on the Bulk Update wizard, refer to the **Creating a Bulk Update** topic.

This operation can also be run via the business rules functionality, as described in the **Business Action: Trigger STEP Workflow Event** topic in the **Business Rules** documentation.

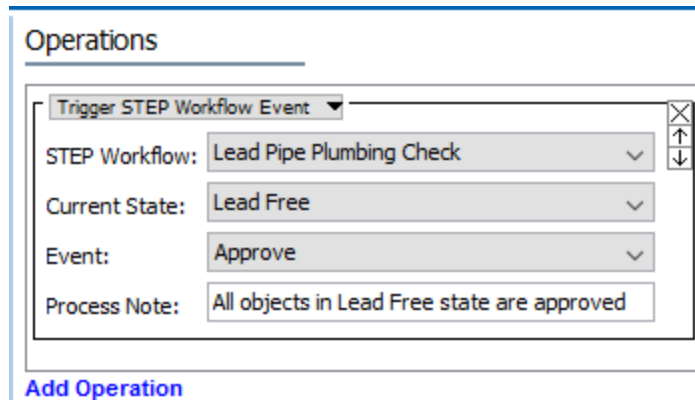
## Prerequisites

Before using this operation:

1. Ensure the workflow exists including states and events.
2. Ensure the node is present in the state defined in the operation.

## Configuration

1. From the dropdown, select the Workflow group and then the **Trigger STEP Workflow Event** option.



The screenshot shows a configuration window titled "Operations". Inside, there is a dropdown menu set to "Trigger STEP Workflow Event". Below this, there are four fields:

- STEP Workflow:** A dropdown menu with "Lead Pipe Plumbing Check" selected.
- Current State:** A dropdown menu with "Lead Free" selected.
- Event:** A dropdown menu with "Approve" selected.
- Process Note:** A text box containing "All objects in Lead Free state are approved".

At the bottom left of the window, there is a blue button labeled "Add Operation".

2. In the **STEP Workflow** parameter, from the dropdown select the relevant workflow.
3. In the **Current State** parameter, from the dropdown select the state that the workflow object must be in when the action is applied.
4. In the **Event** parameter, from the dropdown select the event that the action triggers.
5. In the **Process Note** parameter, enter a comment to be written in the state log when the event is triggered.

# Bulk Update Parameters

The parameters step is only enabled when the 'Run Business Rule' operation is selected on the Operations step, and the selected JavaScript business rule includes one or more 'Attribute Validated Parameter' binds.

For more information, refer to the **Parameterized Business Actions in Web UI** topic in the **Web User Interfaces** documentation.

☐ Bulk Update

Steps

1. Configuration  
2. Operations  
**3. Parameters**  
4. Preview  
5. Advanced

Parameters

Run Business Rule Action [Java Action Testing] depending on predicate [No condition selected]

Parameters templates

|                |                  |         |  |
|----------------|------------------|---------|--|
| ID : attr_lov  | Type : Color     | Title : |  |
| ID : attr_numb | Type : Lead Time | Title : |  |

Back
Next
Finish
Cancel

1. If the Parameters step is enabled, supply the necessary data.
2. Click the **Next** button to display the **Bulk Update Preview** step.

# Bulk Update Preview

This step of the wizard shows some of the results of the configured operations. A maximum of 10 objects are displayed. For each object, the existing data is shown on the 'Old' row and the data that will result from the update is shown on the 'New' row.

Bulk Update

Steps

1. Configuration

2. Operations

3. Parameters

4. Preview

5. Advanced

Preview

| Object    |     | Add Reference                       |
|-----------|-----|-------------------------------------|
| 18214-012 | Old | 0 reference(s) of type SupplierLink |
|           | New | 1 reference(s) of type SupplierLink |
| 18215-012 | Old | 0 reference(s) of type SupplierLink |
|           | New | 1 reference(s) of type SupplierLink |
| 18217-012 | Old | 0 reference(s) of type SupplierLink |
|           | New | 1 reference(s) of type SupplierLink |
|           | Old | 0 reference(s) of type SupplierLink |

Back

Next

Finish

Cancel

1. Hover over a warning or error icon to review potential problems with the bulk update

Warning messages:

Not applicable

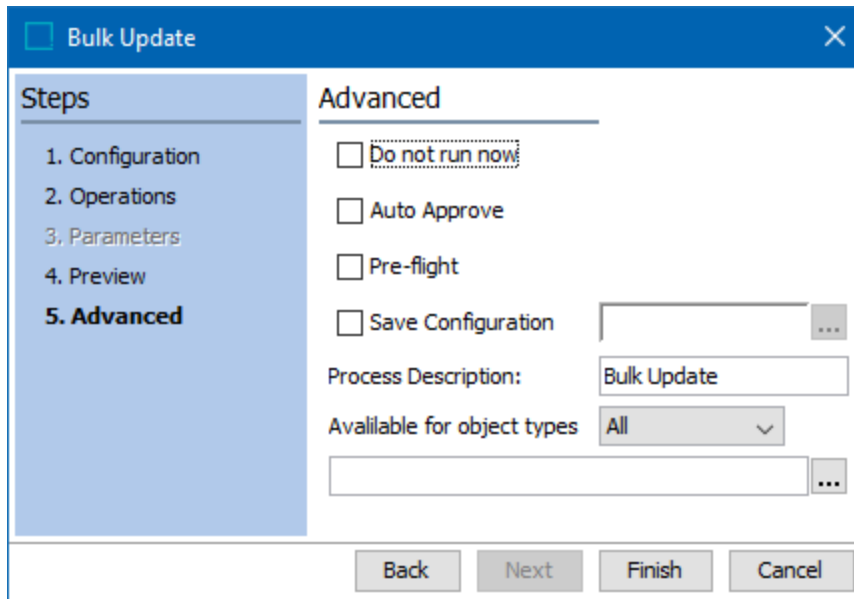
Error messages:

Unable to create reference of type WebsiteLink from Product 20862 to Classification Caps

- Click the **Back** button to resolve warnings and errors by modifying an operation or parameter.
- Click the **Next** button to display **Bulk Update Advanced** step.

# Bulk Update Advanced

In the final step, select one or more of the available options.



1. Set the following parameters as necessary:

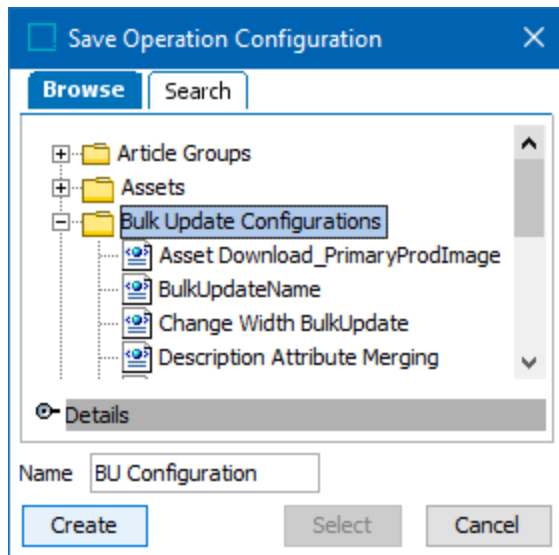
- **Do not run now** runs the bulk update later, and not immediately when the wizard is finished. This allows a user to save the configuration. When checked, the **Auto Approve** and **Pre-flight** parameters are disabled.
- **Auto Approve** approves only updates made by the bulk update and displays them in the approved workspace when the update succeeds. Only a partial approval is performed.

For example, if the bulk update runs on a product attribute and the value is updated, but other changes have been made to the product that were not done by the bulk update, then the partial approval is applied only to the bulk-updated value, not to the entire product. However, if the only change(s) on the product are made by the bulk update, since the bulk update changes are auto approved, the partial approval actually results in a full approval.

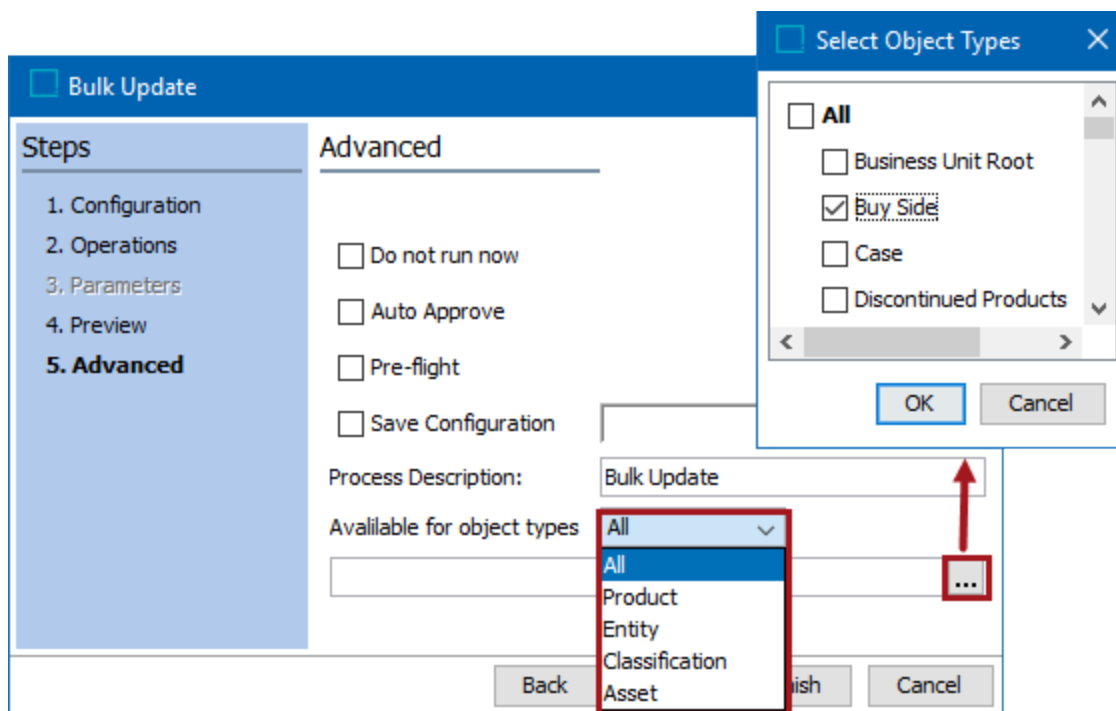
- **Pre-flight** performs a test run of the update. When the user clicks 'Finish', the test runs in a background process. Selected operations are applied and then rolled back. An execution report and an impact report is generated. Temporary collections are created for the objects where the operations were successfully applied, and for the ones where errors were generated. The availability of this option depends on the user's system setup.

**Important:** There is no 'undo' functionality for bulk updates. It is recommended to run a Pre-flight and/or to apply operations to a small set of objects before updating a large number of objects.

- **Save configuration** defines a location and name for the saved configuration so that it can be used again. Click the ellipsis button (...) to display the 'Save Operation Configuration' dialog. To name a new configuration, select a folder and type a name in the Name parameter, and click **Create**. To overwrite an existing configuration, select the configuration and click **Select**.



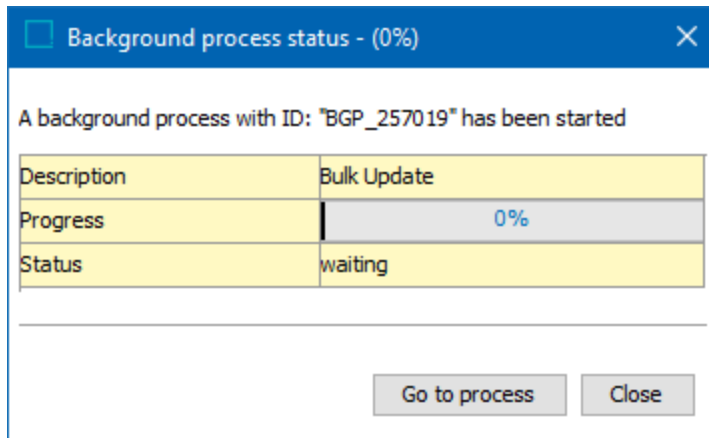
- **Process Description** displays the name for the background process.
- **Available for object types** limits the object types and nodes affected by the bulk update operations. First select an object type from the dropdown, then click the ellipsis button (...) to select the nodes to update.



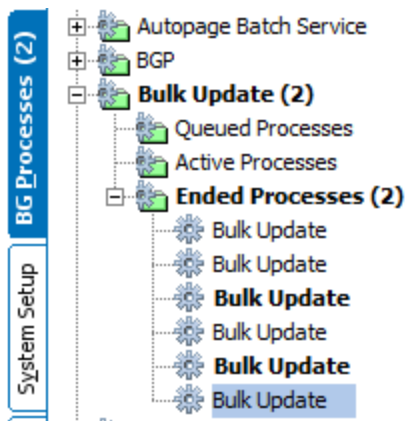
2. Click **Finish** to complete the bulk update configuration and start the operation(s) in a background process.
3. Monitor the bulk update as defined in the **Monitoring Bulk Updates** topic.

# Monitoring Bulk Updates

When a user completes the Bulk Update wizard, the **Background process status** dialog displays. This allows a user to monitor the status of the bulk update that was created.



Click the **Go to Process** button to display the BG Processes tab for additional information about the process.



**Note:** If one operation on an object or the auto approval of the object fails, changes made by other operations are rolled back, and the object is left as it was prior to the bulk update.

For details on the states of a background process, refer to the **BG Processes States** topic in the **System Setup** documentation.

Background Process

Queue Info

|                 |                              |
|-----------------|------------------------------|
| Created         | Tue Aug 23 16:48:11 EDT 2016 |
| Started         | Tue Aug 23 16:48:13 EDT 2016 |
| Finished        | Tue Aug 23 16:48:13 EDT 2016 |
| Processing Time | 0 m 0 s                      |
| Time in Queue   | 0 m 2 s                      |
| # of warnings   | 0                            |
| # of errors     | 1                            |

Execution Report

1 Bulk update background process started (Tue Aug 23 16:48:13 EDT 2016)

2 Context: Context6

3 Workspace: Main

4 Commit Mode: Pre-Flight Check (rollback)

5 Auto Approve: No

6 Collection: [BGP\\_111871\\_tmp\\_input](#)

7 Configuration: temporary configuration

8 Read bulk update operation configuration successfully (Tue Aug 23 16:48:13 EDT 2016)

9 Created temporary collection: [BGP\\_111871\\_tmp\\_fail](#) (Tue Aug 23 16:48:13 EDT 2016)

10 Applying operations to dataset (Tue Aug 23 16:48:13 EDT 2016)

11 [(111204), operation 1]: Error: Unable to create reference of type WebsiteLink from Product (111204) to Classification Exterior (Tue Aug 23 16:48:13 EDT 2016)

12 (rollback) (Tue Aug 23 16:48:13 EDT 2016)

13 Summary (Tue Aug 23 16:48:13 EDT 2016)

14 0 objects OK. 1 objects failed.

15 0 info messages. 0 warning messages. 1 Error messages.

16 Operations Summary (Tue Aug 23 16:48:13 EDT 2016)

17 Operation 1: [Add Reference]

18 Errors: 1

19 1: Unable to create reference

20 End of Summary

1

2

1-20 of 20

Save...

Truncate

Bulk Update Actions

3

4

5

6

Relaunch Wizard

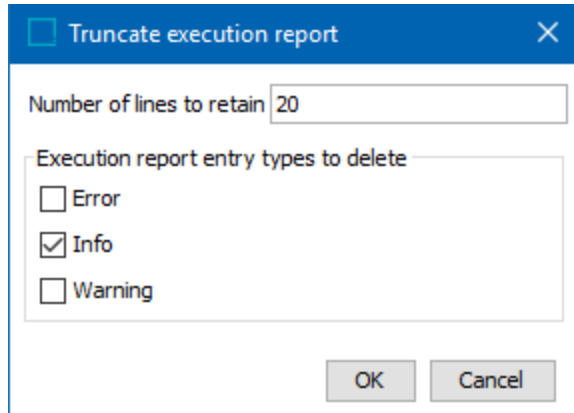
Bulk Update OK Objects

Save Failed Objects

Impact Report

When the process has completed, the following options are available in the **Bulk Update Actions** flipper on the Background Process tab.

1. Click **Save** to keep a copy of the execution report. This can be saved locally.
2. Click **Truncate** if not all lines in the execution report are needed. Upon selecting Truncate, a dialog will appear allowing users to select which lines to delete, and how many lines to retain.



The dialog box titled "Truncate execution report" has a blue header bar with a close button (X) on the right. Below the header, there is a text input field labeled "Number of lines to retain" with the value "20" entered. Underneath this is a section titled "Execution report entry types to delete" containing three checkboxes: "Error" (unchecked), "Info" (checked), and "Warning" (unchecked). At the bottom right of the dialog are two buttons: "OK" and "Cancel".

3. Click **Relaunch Wizard** to open the Bulk Update wizard again. The wizard opens with the same objects selected and with the same operations specified in the process that was just completed.
4. Click **Bulk Update OK Objects** if a pre-flight process was run the bulk update should now be run on the objects that were processed without errors.
5. Click **Save Failed Objects** to save the objects for which the bulk update failed as a new collection. Note that this option is only available if there were failed objects.
6. Click **Impact Report** to view a report of the errors that occurred during the bulk update process. This option is only available if objects failed during the bulk update.

# Scheduling a Task Notification Email

It is possible to send an automated email notifying users of all required workflow tasks by scheduling a bulk update that uses a business action. This email notification provides users with a single location for all assigned tasks, and enables users to better prioritize which tasks need to be addressed first.

## Prerequisites

All of the configuration steps provided in this topic assume the user has knowledge of configuring collections, bulk updates, business actions, and workflows.

For more information on collections, refer to the **Collections** topic in the **Getting Started** documentation.

For more information on bulk updates, refer to the **Bulk Updates** topic in the **Bulk Updates** documentation.

For more information on business actions, refer to the **Business Actions** topic in the **Business Rules** documentation.

For more information on workflows, refer to **Workflows** topic in the **Workflows** documentation.

## Setting Up Email Notifications

To email a user their assigned tasks from a workflow the following elements must be created: a collection, a business action, and a bulk update. Once configured, an email notification containing a consolidation of all active tasks from one or more workflows is sent to the user(s) or user group(s) that are assigned the tasks.

To configure these, follow the directions listed below.

1. Create a collection with a single object in it that is permanent. The chosen permanent object needs to be something that will never be deleted from the system because it will be used in the scheduled bulk update. Additionally, if more than one object is added to the collection, multiple email notifications could be sent, which is not the desired outcome. The 'Primary Product Hierarchy' is used in this example.

Tree

- Publications
  - Primary Product Hierarchy
    - Collections
      - assets
      - Blue and Red items
      - Bulk Notification Object**
        - Primary Product Hierarchy
        - Collection of Cotton T-shirts
        - Cotton T-shirts
        - Cust2
        - Customer Type
        - Digital Asset Review State
        - Image Dedup Demo Assets
        - Item List
        - Items List
        - Marks collection
        - Party Hats
        - Products collections
        - Products with Assets
        - Temporary Collections
        - TshirtCollections
      - eCatalogs
      - Recycle Bin

Bulk Notification Object - Collection

Collection | Data Profile | Log

Description

| Name                        | Value                                                           |
|-----------------------------|-----------------------------------------------------------------|
| ID                          | 158901                                                          |
| Name                        | Bulk Notification Object                                        |
| Estimated Amount of Objects | 1                                                               |
| Search URL                  | step://search?args0.0=nodetype%3dproduct%2cobjecttype%3dProduct |
| Last edited By              | 2022-08-16 00:10:06 by USER2                                    |

Statistics

Collection Content

1 object(s)

Notice: Objects in Collection may be hidden in Tree due to Context/Workspace visibility and/or privilege checks

Content by Object Type

Product (1)

- Primary Product Classification (1)

2. Next, create a business action that checks the relevant workflow(s) and their state(s) for tasks. Configure the business action so that if the desired object types are in the designated workflow state(s), then an email will be created and sent to the designated user. In this example, the business action is called 'Bulk Notification.'

**Business Rule Editor - Bulk Notification**

ID: BulkNotification

Name: Bulk Notification

Description:

Type: Edit Operation

Scope:

On Activation:

Valid:

Run:

Open:

Messages:

| Variable name | Message      | Translations |
|---------------|--------------|--------------|
| manager       | STEP Manager |              |
| qh            | Query Home   |              |
| mh            | Mail Home    |              |

```
JavaScript:
1 // Setup Query for items in a specific workflow state
2 var workflow = manager.getWorkflowHome().getWorkflowByID("ItemCreation");
3 var supplierEnrichState = workflow.getStateByID("Supplier_Enrichment");
4 var c = com.stibo.query.condition.Conditions;
5 var querySpecification = qh.queryWorkflowTasks().where (
6     c.workflow().eq(workflow)
7     .and(c.state().eq(supplierEnrichState))
8 );
9
10 // Execute Query and create mail message with simple HTML table for items
11 var query = querySpecification.execute();
12 var itemCount = 0;
13 var mailMessage = "Workflow: " + workflow.getTitle() + "<br/>";
14 mailMessage = mailMessage + "State: " + supplierEnrichState.getTitle() + "<br/><br/>";
15
16 mailMessage = mailMessage + "<table>\n<tr><th>ID</th><th>Name</th></tr>\n";
17 query.forEach(function(aTask) {
18     itemCount++;
19     var objID = aTask.getNode().getID();
20     var objTitle = aTask.getNode().getTitle();
21     mailMessage = mailMessage + "<tr><td>" + objID + "</td><td>" + objTitle + "</td></tr>\n";
22     return true;
23 });
24 mailMessage = mailMessage + "</table>\n";
25
26 // Send mail if we found any items
27 if (itemCount > 0) {
28     var mail = mh.mail();
29     mail.addTo("laal@stibosystems.com");
30     mail.subject("" + itemCount + " Products in Supplier_Enrichment");
31     mail.htmlMessage(mailMessage);
32     mail.send();
33 }
```

Edit externally

Save Test JavaScript Cancel

To create this business action, under 'Binds,' create variable names to bind to STEP Manager, Query Home, and Mail Home. In the example, the following binds were created:

| Variable name | Bind to      |
|---------------|--------------|
| manager       | STEP Manager |
| qh            | Query Home   |
| mh            | Mail Home    |

The following JavaScript can be used as a template:

```

1 // Setup Query for items in a specific workflow state.
2 var workflow = manager.getWorkflowHome().getWorkflowByID("ItemCreation");
3 var supplierEnrichState = workflow.getStateByID("Supplier_Enrichment");
4 var c = com.stibo.query.condition.Conditions;
5 var querySpecification = qh.queryWorkflowTasks().where (
6     c.workflow().eq(workflow)
7     .and(c.state().eq(supplierEnrichState))
8 );
9
1 // Execute Query and create an email message with simple HTML table for items.
0
1 var query = querySpecification.execute();
1
1 var itemCount = 0;
2
1 var mailMessage = "Workflow: " + workflow.getTitle() + "<br/>";
3
1 mailMessage = mailMessage + "State: " + supplierEnrichState.getTitle() + "<br/><br/>";
4
1 mailMessage = mailMessage + "<table>\n<tr><th>ID</th><th>Name</th></tr>\n";
5
1 query.forEach(function(aTask) {
6
1     itemCount++;
7
1     var objID = aTask.getNode().getID();
8
1     var objTitle = aTask.getNode().getTitle();

```

```

9
2     mailMessage = mailMessage + "<tr><td>" + objID + "</td><td>" + objTitle +
0 "</td></tr>\n";
2
2     return true;
1
2
2     });
2
2     mailMessage = mailMessage + "</table>\n";
3
2
4
2     // Send an email if any items are found. (If needed additional email addresses can be
5 configured depending on products in a Task List.)
2
2     if (itemCount>0) {
6
2
2     var mail = mh.mail();
7
2
2     mail.addTo("UserL@stibosystems.com");
8
2
2     mail.subject("'" + itemCount + " Products in Supplier_Enrichment");
9
3
0     mail.htmlMessage(mailMessage);
3
1     mail.send();
3
2     }

```

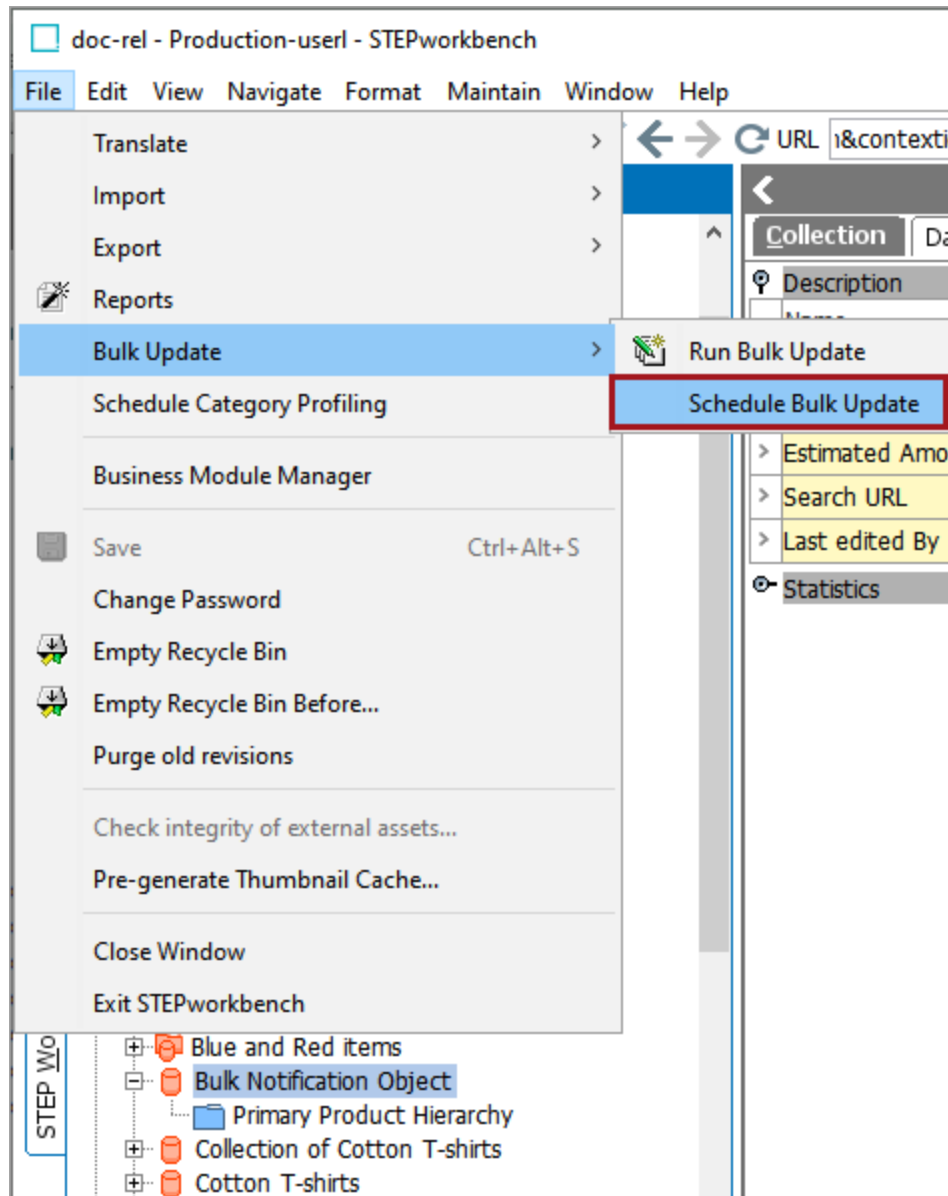
3. Next, create a bulk update configuration that runs the business action just created, as shown in the screenshot below. Schedule the bulk update to run with the collection that was defined using the business action.

The screenshot shows the 'Bulk Update' dialog box with the 'Operations' step selected. The 'Steps' list on the left includes: 1. Configuration, 2. **Operations**, 3. Parameters, 4. Preview, and 5. Advanced. The 'Operations' section contains a 'Run Business Rule' dropdown, a 'Business Rule Condition' field, and a 'Business Rule Action' field set to 'Bulk Notification (BulkNotification: ...)'. Below these fields is an 'Add Operation' button. At the bottom of the dialog are 'Back', 'Next', 'Finish', and 'Cancel' buttons.

4. Save the Bulk Update configuration.

The screenshot shows the 'Bulk Update' dialog box with the 'Advanced' step selected. The 'Steps' list on the left includes: 1. Configuration, 2. Operations, 3. Parameters, 4. Preview, and 5. **Advanced**. The 'Advanced' section contains several options: ☒ Do not run now, ☐ Auto Approve, ☐ Pre-flight, and ☒ Save Configuration (highlighted with a red box). Below these are fields for 'Process Description' (containing 'Bulk Update') and 'Available for object types' (set to 'All'). At the bottom of the dialog are 'Back', 'Next', 'Finish', and 'Cancel' buttons.

5. Next, navigate to the saved collection created earlier with only one object in it, and click on it. Go up to File > Bulk Update > Schedule Bulk Update.



6. Select the bulk update configuration just created and click through the wizard to set the schedule for the bulk update.

☐ Schedule Bulk Update

Steps

1. Setup  
2. Preview  
**3. Schedule Process**  
4. Name Process

Schedule Process

Start

☐ Now

Start at (hh:mm): 16:59

☐ Later

Start on (yyyy-mm-dd): 2022-08-19

☒ Weekly

End on (yyyy-mm-dd): -

☐ Monthly

Every:

☒ Mon
☐ Sat

☒ Tue
☐ Sun

☒ Wed

☒ Thu

☒ Fri

☐ Later and repeat

Start every Mon, Tue, Wed, Thu, Fri 16:59:00 CST, starting Fri Aug 19 2022

Back
Next
Finish
Cancel

Since there is only one object in the collection configured on the bulk update, the business action will only run one single time.

- When complete, an email is sent to the user listing the tasks they are responsible for in the designated workflow(s) and their state(s).

















151 Products in Su...









File

Message

Help



Tell me what you want to do



Delete



Respond



Share to Teams

Teams



Quick Steps

Quic...



Move



Tags



Editing



Speech



Zoom



Zoom

151 Products in Supplier\_Enrichment



doc@stibo.com

To  Loren Taalenha









2:59 PM

Workflow: Item Creation

State: Supplier Enrichment

| ID     | Name                        |
|--------|-----------------------------|
| 121171 | Pink & Green Party Hat      |
| 112823 | Purple & White Party Hat(2) |
| 112825 | Yellow & Pink Party Hat(2)  |
| 112834 | Cosmic Party Hat            |
| 112839 | Pink & Green Pom-Pom Hat    |
| 112841 | Pink & Green Pom-Pom Hat    |

# Scheduling Bulk Updates for Collections

Scheduling a bulk update for a collection can be useful when a group of objects needs to be updated on a regular basis. A scheduled bulk update on a collection can reduce the amount of time required to make those same updates manually. For example, if products incoming from a specific supplier feature a measurement with 'millimeters' spelled out, but the internal standard requires only 'mm' to be used, scheduling a bulk update to make that change periodically can be an effective data management tool.

**Important:** Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instruction to the server to run the job. This can cause confusion about when the job will run since the scheduled time is not automatically converted to accommodate potential differences in time zones.

## Prerequisites

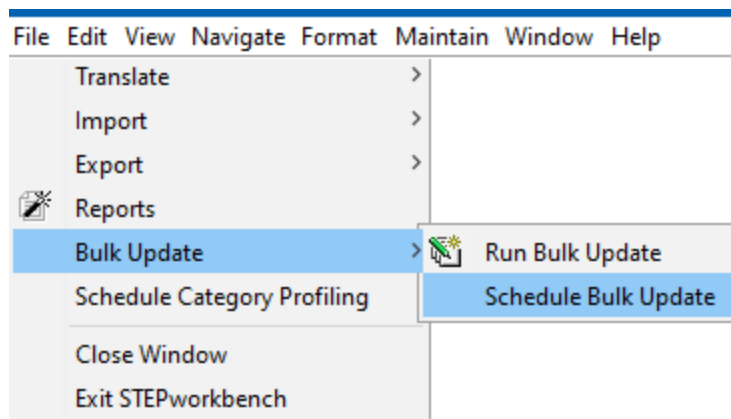
The following tasks must be completed before a collection is scheduled to run a bulk update.

1. Create a collection. More on creating a collection can be found in the **Creating Collections** topic in the **Getting Started** documentation.
2. Create a bulk update configuration. Refer to **Creating a Bulk Update** topic for more on how to configure a bulk update.

## Scheduling Bulk Updates

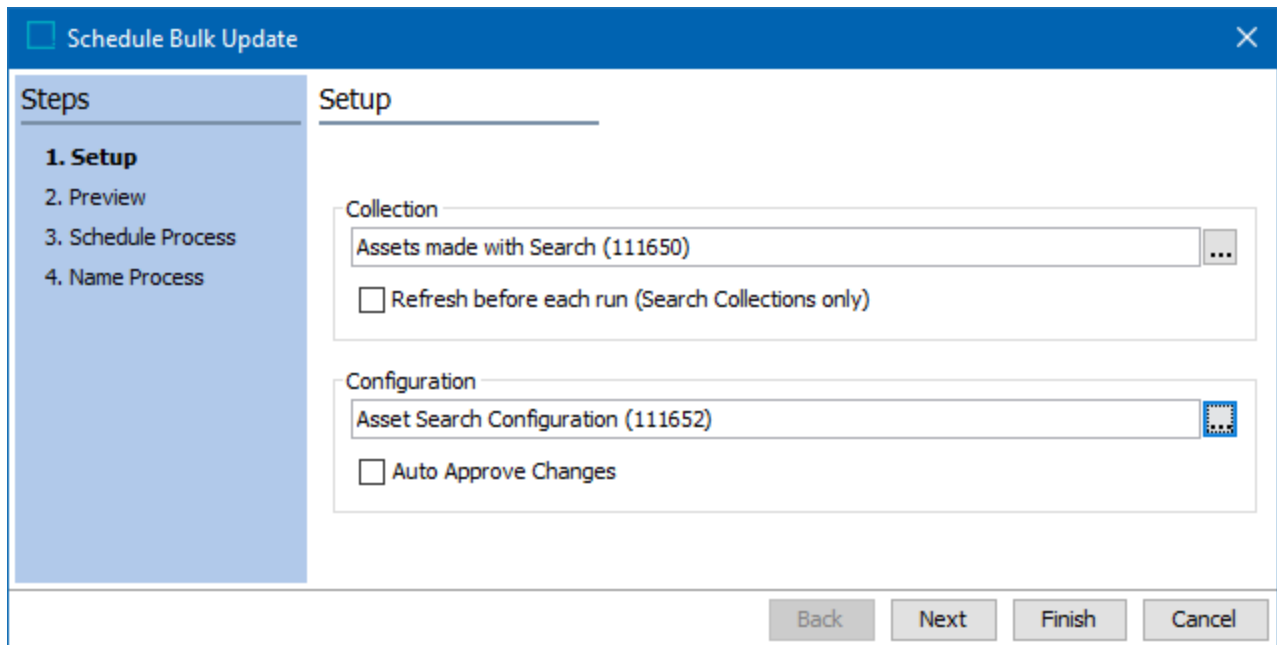
To perform a bulk update on a collection at regular intervals, create a schedule that applies to a particular collection. The bulk update is then automatically run at the scheduled time.

1. Open the Schedule Bulk Update wizard from File > Bulk Updates > **Schedule Bulk Update**.



2. On Setup, for the Collection parameter, click the ellipsis button (...) to locate and select the relevant collection. This option is not valid if the collection is created from the File menu, Bulk Update option, Run Bulk Update.

- For the **Refresh before each run (Search Collections only)** parameter, if the collection selected was created using the search criteria, and the checkbox is selected, it will refresh the collection based on the current data using search criteria, before executing the bulk update operation(s).



3. For the Configuration parameter, click the ellipsis button (...) to locate and select the relevant configuration.
  - For the **Auto approve changes** parameter, check the checkbox to place the updated objects in the approved workspace immediately after the update.
4. Click **Next** to display Preview and review the example results of the update.

☐ Schedule Bulk Update

Steps

1. Setup  
**2. Preview**  
3. Schedule Process  
4. Name Process

Preview

| Object        |     | Set single value [Caption1] |
|---------------|-----|-----------------------------|
| > HYD543      | Old |                             |
| > RP4100      | New | Pictures by Stibo Inc.      |
| > Glasses     | Old |                             |
| > Evian, case | New | Pictures by Stibo Inc.      |
| > Evian, open | Old |                             |
| > Evian, pack | New | Pictures by Stibo Inc.      |
| > Evian, 6pk  | Old |                             |
| >             | New | Pictures by Stibo Inc.      |

Back
Next
Finish
Cancel

5. Click **Next** to display Schedule Process and create the time schedule by selecting either **Now**, **Later**, **Weekly**, **Monthly**, or **Later and repeat**. Complete the options related to the schedule.

☐ Schedule Bulk Update

Steps

1. Setup  
2. Preview  
**3. Schedule Process**  
4. Name Process

Schedule Process

Start

☐ Now  
☐ Later  
☒ **Weekly**  
☐ Monthly  
☐ Later and repeat

Start at (hh:mm): 11:04  
Start on (yyyy-mm-dd): 2016-08-19  
End on (yyyy-mm-dd): -  
Every:

☒ Mon ☐ Sat  
☐ Tue ☐ Sun  
☐ Wed  
☐ Thu  
☐ Fri

Start every mon at 11:04, starting 2016-08-19

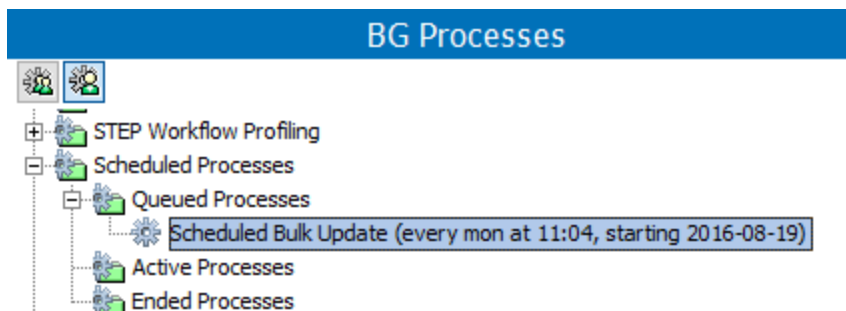
Back
Next
Finish
Cancel

6. Click **Next** to display Name Process and enter a name for the **Schedule Process Name** parameter. The **Process Name** parameter displays the name displayed in the Background Processes tab.

7. Click **Finish** to complete the wizard.
8. On the Background Processes dialog choose an option:
  - Click **Go to process** to display the background process.
  - Click **Close** to display the workbench.

|             |             |
|-------------|-------------|
| Description | Bulk Update |
| Progress    | 0%          |
| Status      | waiting     |

Below, on the BG Processes tab, viewing the process shows a bulk update that is scheduled to run at a later time under 'Queued processes.'



For details on the states of a background process, Refer to the **BG Processes States** topic in the **System Setup** documentation.

Below, on the BG Processes tab, the Execution Report shows the process with a Status of 'waiting.' If users need to make an adjustment to the scheduled bulk update, clicking the 'Edit Schedule' button (shown at the bottom of the screenshot below) will reopen the 'Schedule Bulk Update' wizard on the 'Schedule Process' step. Users can then amend the schedule as needed, and the changes will be applied to the bulk update.

< Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19) - Background Process

Background Process

Properties

| Property         | Value                                                           |
|------------------|-----------------------------------------------------------------|
| Started by       | USERL                                                           |
| Id               | BGP_111657                                                      |
| Description      | Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19) |
| Execution Server | doc-rel                                                         |
| Status           | waiting - 1 of 1 in SCHEDULE                                    |
| Created          | Fri Aug 19 11:13:35 EDT 2016                                    |
| Started          | Fri Aug 19 11:13:36 EDT 2016                                    |
| Finished         | Fri Aug 19 11:13:36 EDT 2016                                    |
| Processing Time  | 0 m 0 s                                                         |
| Time in Queue    | 0 m 1 s                                                         |
| # of warnings    | 0                                                               |
| # of errors      | 0                                                               |
| Start After      | Mon Aug 22 11:04:00 EDT 2016                                    |

Execution Report

1 Collection: [Assets made with Search](#)  
2 Configuration: [Caption 1 Configuration](#)

<< < 1-2 of 2 > >>

Save...

Truncate

Bulk Update Actions

Edit Schedule

For information on how to schedule bulk updates for collections in Web UI, refer to the **Scheduling a Collection Refresh in Web UI** topic in this documentation.

# Scheduling a Collection Refresh in Web UI

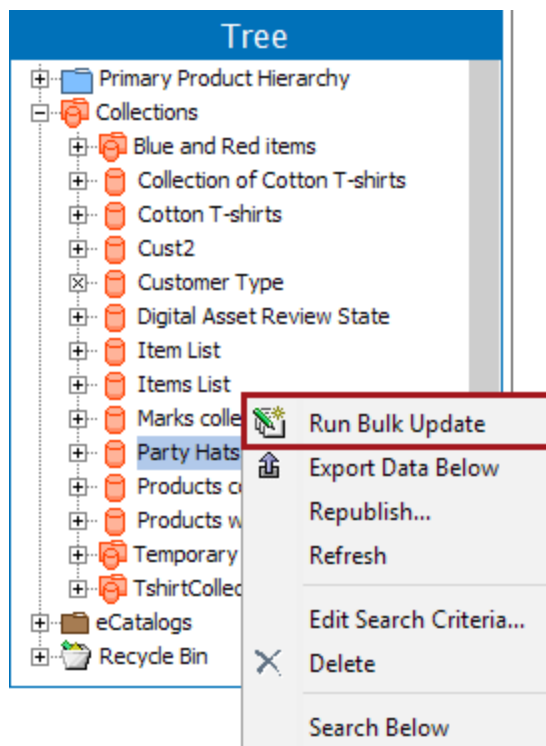
Collections are often used as filters on status selectors, though to refresh a collection in the Web UI you must go to the collection directly to refresh it in Web UI without going to the collection directly. This can be accomplished by going to the collection content screen directly or via a scheduled bulk update. Using a scheduled bulk update you can control the amount and frequency of the collection refresh processes.

For more information on status selectors, refer to the **Status Selector Homepage Widget** topic in the **Workflows in Web UI** section of the **Web User Interfaces** documentation.

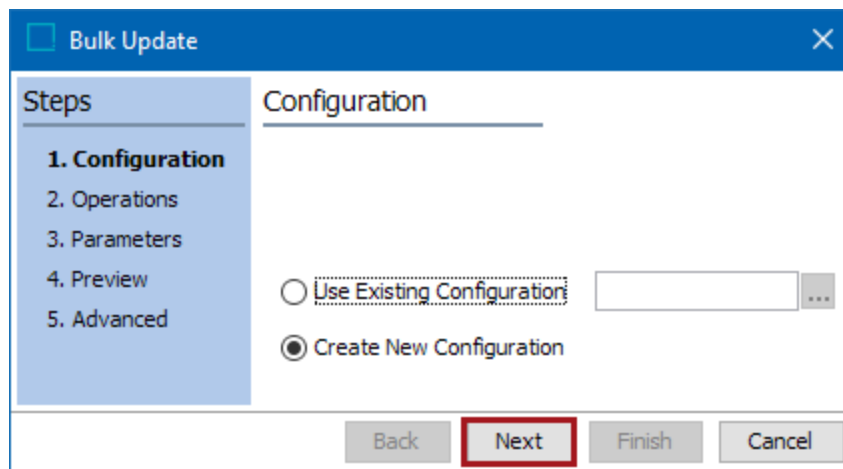
**Important:** Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instruction to the server to run the job. This can cause confusion about when the job will run since the scheduled time is not automatically converted to accommodate potential differences in time zones.

To schedule a collection refresh, follow the directions below:

1. Create a new bulk update configuration. In the example below, a collection is created by right-clicking on the desired collection in workbench and selecting **Run Bulk Update**.



2. In the Bulk Update dialog, select **Create New Configuration**, and click **Next**.



**Bulk Update** [X]

**Steps**

- 1. Configuration**
- 2. Operations
- 3. Parameters
- 4. Preview
- 5. Advanced

**Configuration**

☐ Use Existing Configuration [Text Field] [...]

☒ Create New Configuration

[Back] **Next** [Finish] [Cancel]

3. In the Operations step, close the default operation template to remove all operations. This will enable the action buttons so that you can proceed with no operation selected.

**Bulk Update**

**Steps**

- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

Merge Attribute Values

Merge [ ] ... into [ ] ...

Source Workspace: Main

Overwrite: Keep original values

Merge Link Attributes: No

Add Operation

Back Next Finish Cancel

**Bulk Update**

**Steps**

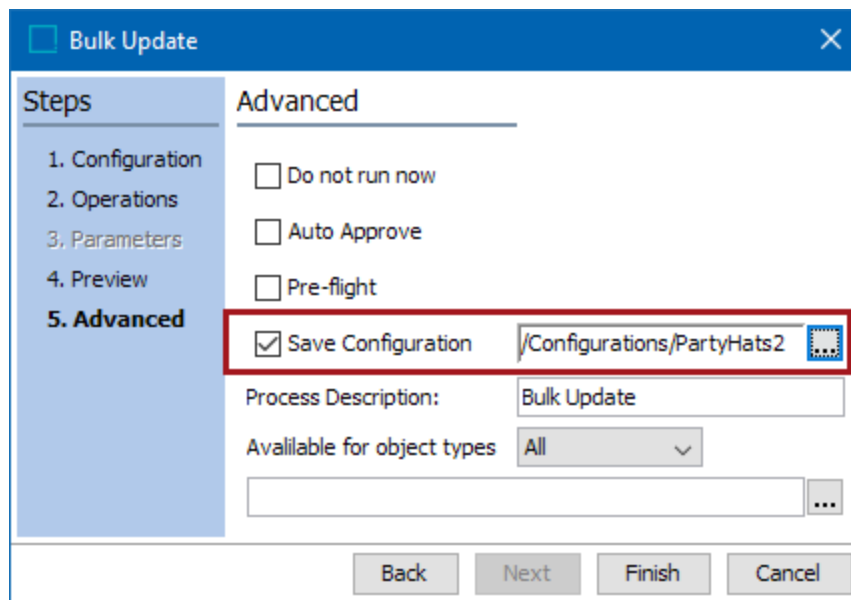
- 1. Configuration
- 2. Operations**
- 3. Parameters
- 4. Preview
- 5. Advanced

**Operations**

Add Operation

Back Next Finish Cancel

- Continue to click **Next** to get to the final step, and be sure to select **Save Configuration** before finishing.



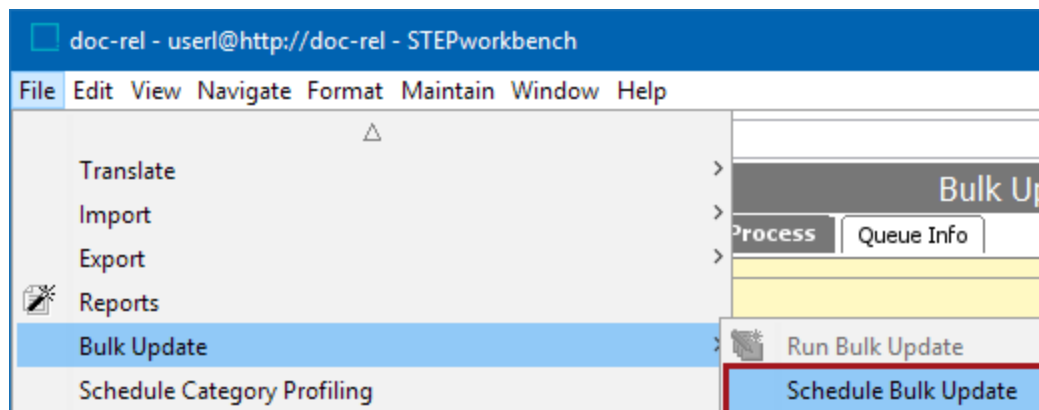
The image shows the 'Bulk Update' dialog box with the 'Advanced' tab selected. The 'Steps' list on the left includes: 1. Configuration, 2. Operations, 3. Parameters, 4. Preview, and 5. Advanced (highlighted). In the 'Advanced' section, the following options are visible:

- ☐ Do not run now
- ☐ Auto Approve
- ☐ Pre-flight
- ☒ Save Configuration (highlighted with a red box)
  - Path: /Configurations/PartyHats2 (highlighted with a red box)
- Process Description: Bulk Update
- Available for object types: All (dropdown menu)

At the bottom, there are buttons for 'Back', 'Next', 'Finish', and 'Cancel'.

Once complete, this will trigger the update, but it does not actually execute any changes. You may view the background process, or close the dialog prompt.

- Next, navigate to File > Bulk Update > **Schedule Bulk Update**.



- Select the relevant collection, check the refresh option, and select the bulk update configuration that you just created in the previous steps.

The screenshot shows the 'Schedule Bulk Update' dialog box with the 'Setup' step selected. The 'Steps' list on the left includes: 1. Setup (highlighted), 2. Preview, 3. Schedule Process, and 4. Name Process. The 'Setup' section contains two input fields: 'Collection' with the value 'Party Hats (111807)' and a dropdown arrow, and 'Configuration' with the value 'PartyHats2 (136001)' and a dropdown arrow. A checkbox labeled 'Refresh before each run (Search Collections only)' is checked. Below these fields is an unchecked checkbox labeled 'Auto Approve Changes'. At the bottom are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

7. Continue to click **Next** to get to the Schedule Process step. Select the **Later and repeat** option, and specify the interval at which it should be run.

The screenshot shows the 'Schedule Bulk Update' dialog box with the 'Schedule Process' step selected. The 'Steps' list on the left includes: 1. Setup, 2. Preview, 3. Schedule Process (highlighted), and 4. Name Process. The 'Schedule Process' section has a 'Start' section with five radio button options: 'Now', 'Later', 'Weekly', 'Monthly', and 'Later and repeat' (which is selected). To the right of these options are three input fields: 'Start at (hh:mm):' with the value '15:02', 'Start on (yyyy-mm-dd):' with the value '2018-12-17', and 'Minutes between attempts' with the value '30'. Below these fields, a summary text reads: 'Start every 30 minutes, starting Mon Dec 17 15:02:00 EST 2018'. At the bottom are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

8. Click Next / Finish to complete the 'Schedule Bulk Update' process.
9. Repeat steps 5-8 as needed to schedule auto-refreshes for additional collections.

If the schedule for the Bulk Update must be amended, users can click on the scheduled bulk update on the BGProcesses tab, and then click the 'Edit Schedule' button (shown at the bottom of the screenshot below). This will reopen the 'Schedule Bulk Update' wizard on the 'Schedule Process' step from which users can then amend the schedule as needed. The changes will be applied to the scheduled bulk update.

## < Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19) - Background Process -|>

### Background Process

#### 🔑 Properties

| Property         | Value                                                           |
|------------------|-----------------------------------------------------------------|
| Started by       | USERL                                                           |
| Id               | BGP_111657                                                      |
| Description      | Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19) |
| Execution Server | doc-rel                                                         |
| Status           | waiting - 1 of 1 in SCHEDULE                                    |
| Created          | Fri Aug 19 11:13:35 EDT 2016                                    |
| Started          | Fri Aug 19 11:13:36 EDT 2016                                    |
| Finished         | Fri Aug 19 11:13:36 EDT 2016                                    |
| Processing Time  | 0 m 0 s                                                         |
| Time in Queue    | 0 m 1 s                                                         |
| # of warnings    | 0                                                               |
| # of errors      | 0                                                               |
| Start After      | Mon Aug 22 11:04:00 EDT 2016                                    |

#### 🔑 Execution Report

- 1 Collection: [Assets made with Search](#)
- 2 Configuration: [Caption 1 Configuration](#)

⏪
⏮
1-2 of 2
⏭
⏩
Save...
Truncate

#### 🔑 Bulk Update Actions

[Edit Schedule](#)