



# USER GUIDE

## Bulk Updates

2025.4 - December 2025



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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:

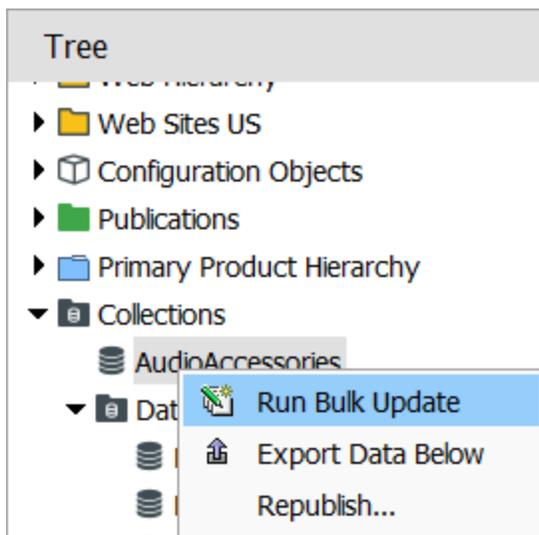
1. Monitor a bulk update through a background process as described in [Monitoring Bulk Updates](#).
2. Schedule a bulk update as described in [Scheduling Bulk Updates for Collections](#).
3. Export a bulk update definition as comments and submit to an external source control system for comparison purposes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

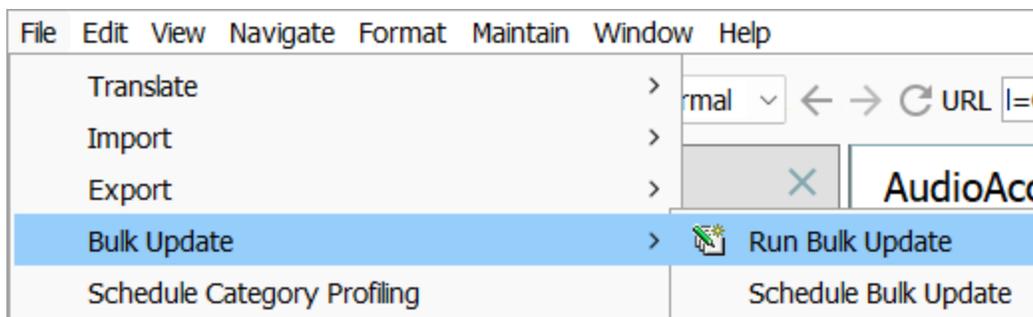


- **Run on a single or multiple selected objects in Tree or System Setup:** Select one or more of the objects defined in the following table, then from the menu choose File > Bulk Update > **Run Bulk Update**.



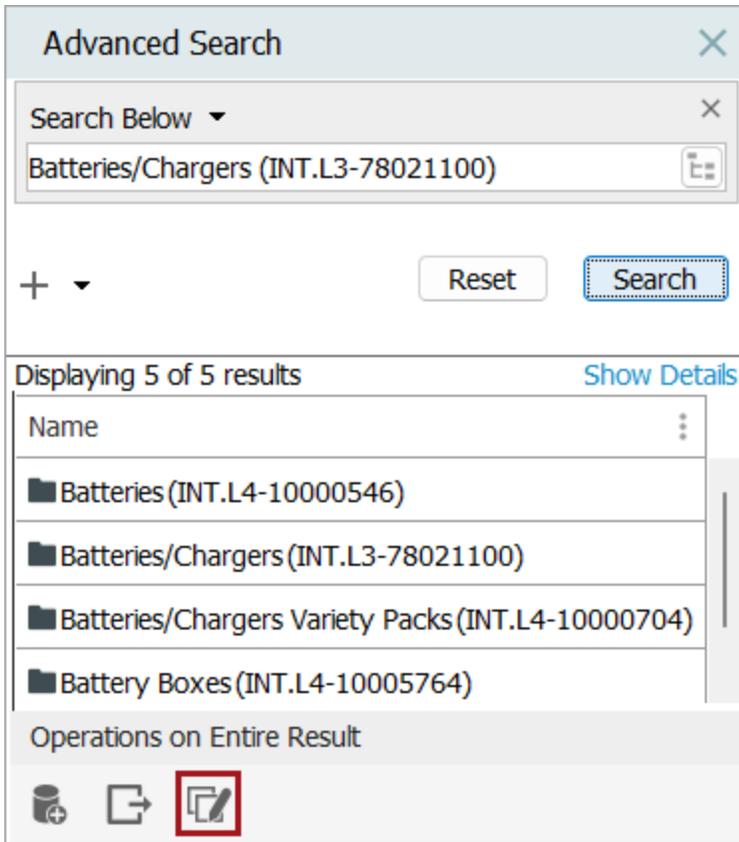
**Note:** To run a saved bulk update configuration (which loads the operations and settings) first start the wizard, and then choose the existing configuration on the Configuration step shown below.

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 the publication hierarchy</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> <li>• Inbound Integration Endpoints</li> <li>• Keys</li> <li>• List of Values</li> </ul>	<ul style="list-style-type: none"> <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, classification, publication, setup group, etc.)</li> <li>• Context -Dimension points</li> </ul>

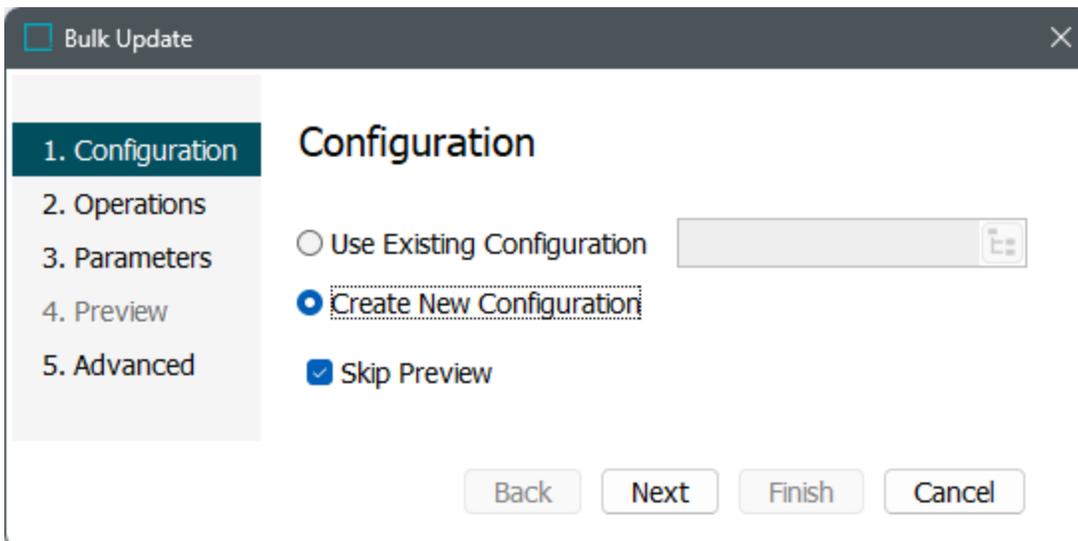


- **Run on search results:** Perform an advanced search, and click the **Bulk Update** button ()

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



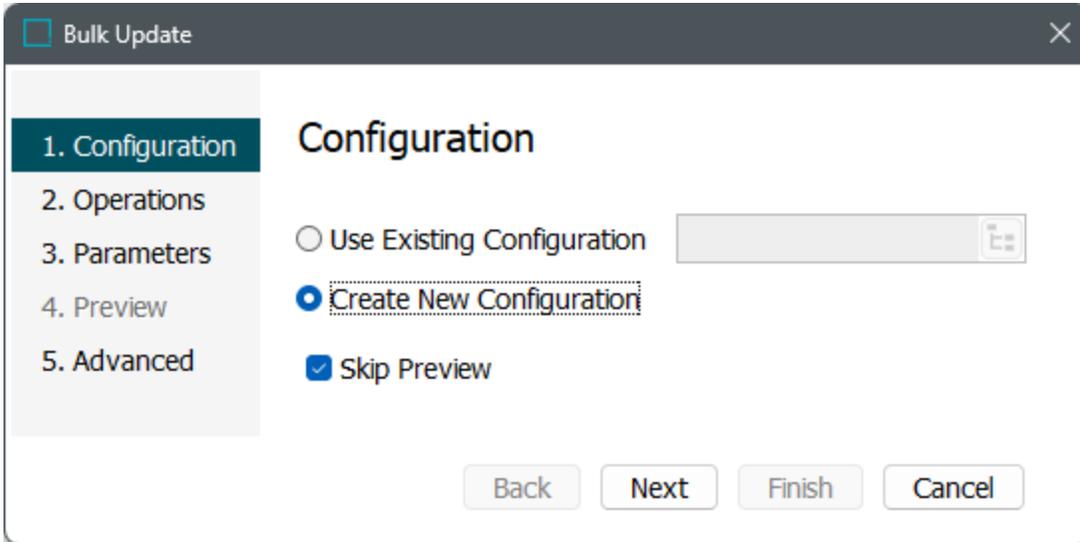
3. The Bulk Update wizard displays and can involve the following steps:



- 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.

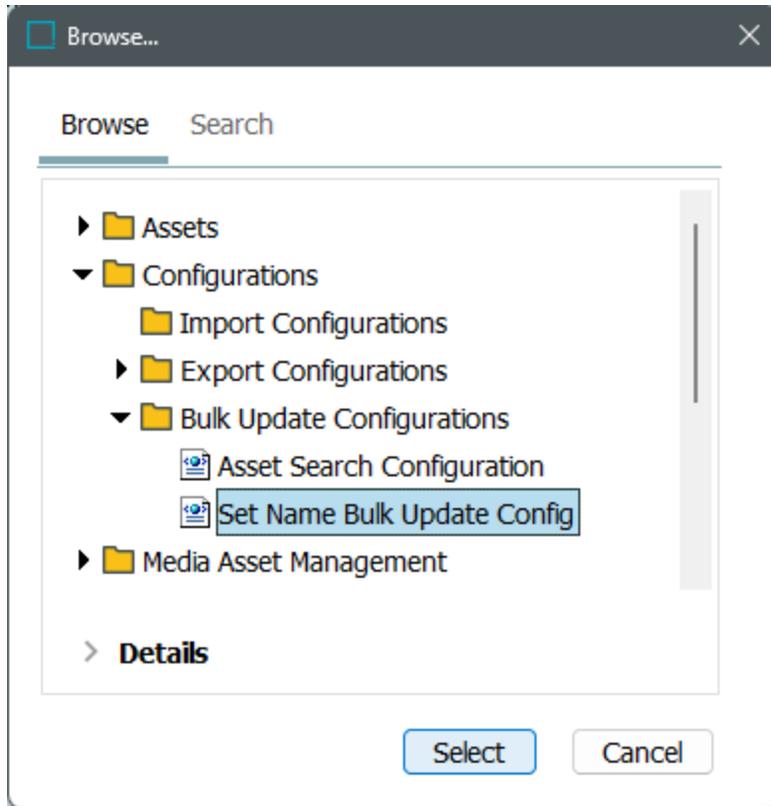
# Bulk Update Configuration

Specify the configuration to run for the bulk update.



1. Choose the option for the desired configuration:

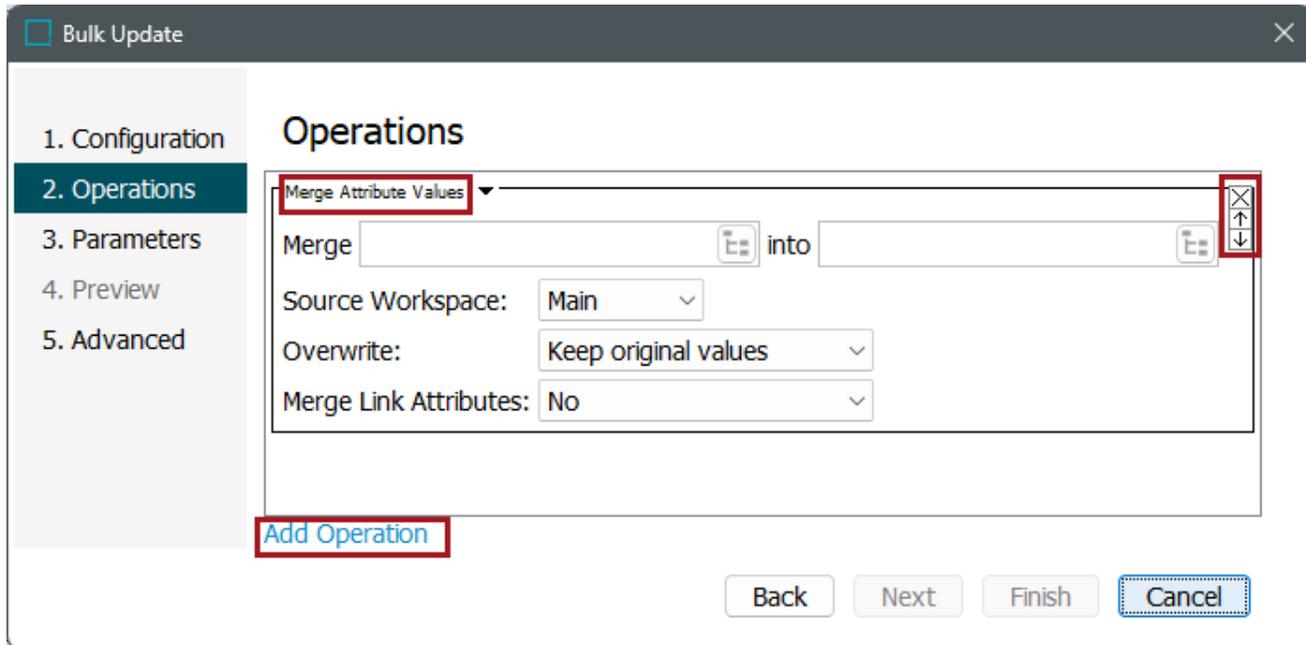
- Click the 'Use Existing Configuration' radio button to use a saved bulk update configuration, then click the selector button  to display the configuration selection dialog. Use the Browse or Search tab to select the relevant configuration and click the **Select** button.



- Click the 'Create New Configuration' radio button to create a new configuration.
2. Set the 'Skip Preview' checkbox as required. Depending on configured operations, the Preview step can execute irreversible actions in business rules such as email notifications or REST calls. By default, this option is checked, and the Preview is skipped.
    - Check to skip the preview step.
    - Uncheck to display the preview results and run associated business rules.
  3. Click the **Next** button to display the Bulk Update Operations step.

# Bulk Update Operations

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



## 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 for the operation.
- 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.

**Important:** Ensure that the operations are listed in the order that they need to be performed—from the top down. When multiple operations are included, the operations that 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, the Bulk Update Preview step, or the Bulk Update Advanced step, depending on the configured operations and the Skip Preview parameter selection in the Configuration step.

# Attribute Values: Clear Value Operation

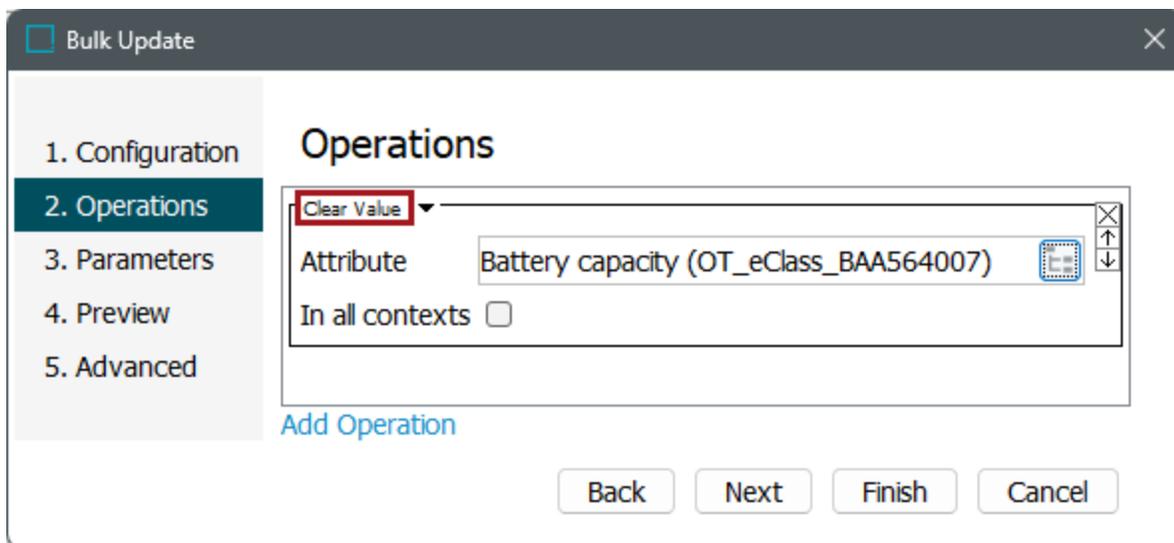
The Clear Value bulk update plugin allows for clearing values across one or all contexts.

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

## Configuration

1. From the dropdown, under 'Attribute values' select **Clear Value**.
2. For the Attribute parameter, click the selector button (  ) and choose an attribute using standard Browse / Search node picker functionality within the Select Attribute dialog.

Until an attribute is selected, the error message 'No Attribute Selected' is displayed and the Next button is disabled.



3. For the 'In all contexts' checkbox, check the box to clear an attribute value in all contexts. Otherwise, the values are only cleared for the context you are currently in.
4. 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 documentation.

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.

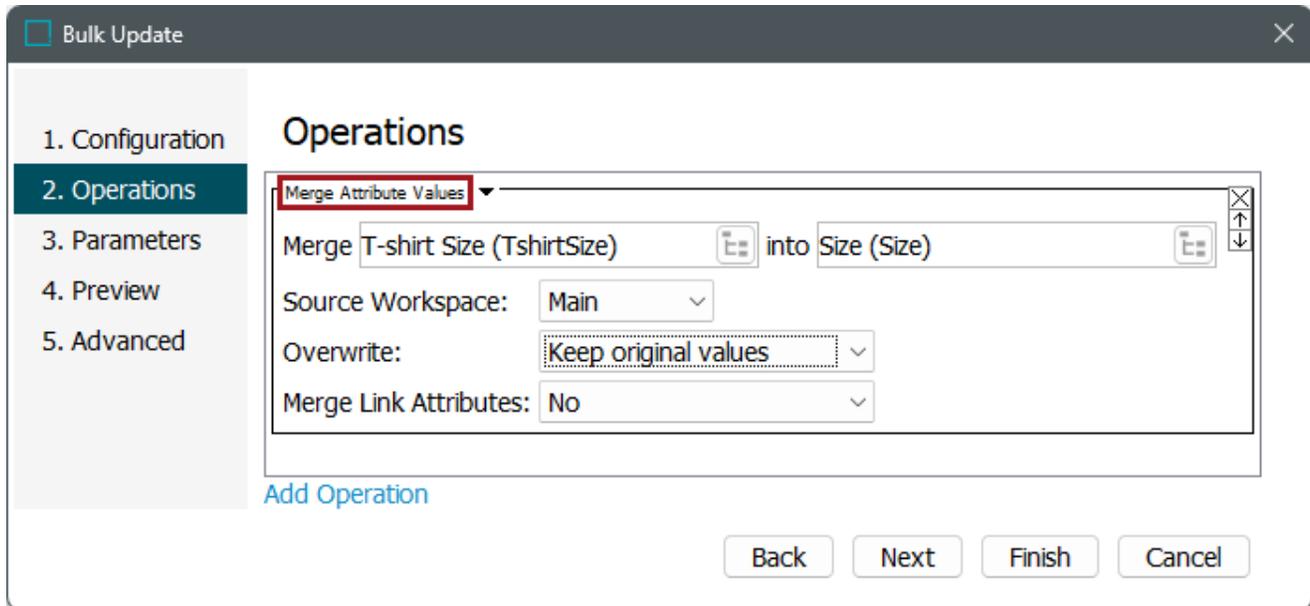
### Prerequisites

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.



2. For the **Merge** parameter, click the selector 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 selector 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.

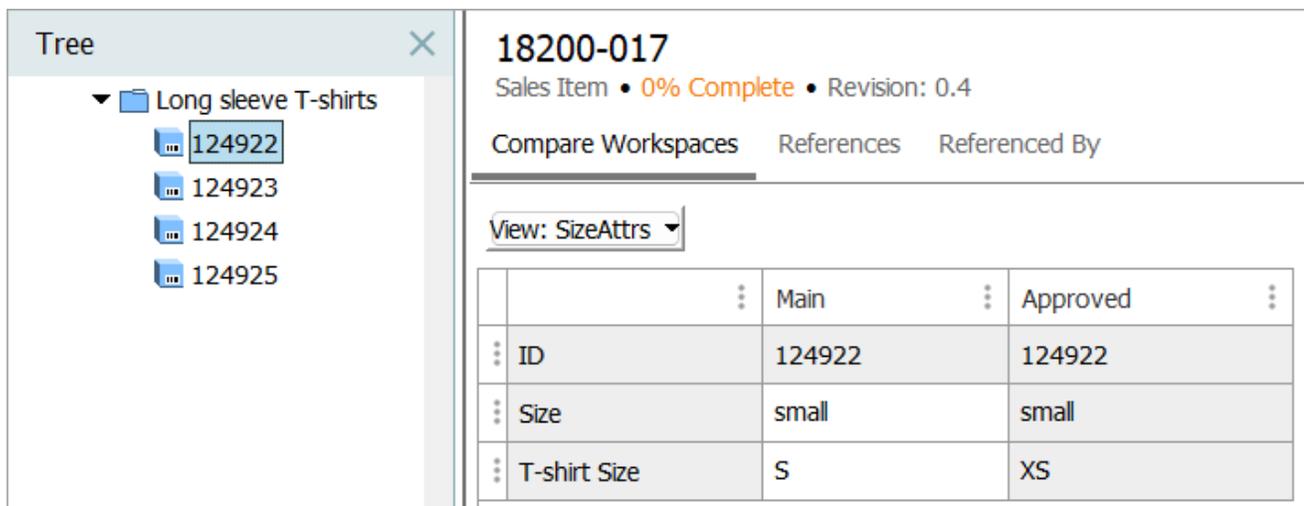
## Merge Results

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.



**18200-017**  
Sales Item • 0% Complete • Revision: 0.4

Compare Workspaces    References    Referenced By

View: SizeAttrs

	Main	Approved
ID	124922	124922
Size	small	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 ✕

- ▼ Long sleeve T-shirts
  - 124922
  - 124923
  - 124924
  - 124925

### Products

Products   References   Referenced By

---

View: SizeAttrs ▼

	ID	Size	T-shirt Size
⋮	124922	small	S
⋮	124923		S
⋮	124924	medium	
⋮	124925		

- Notice that the only value changed in this scenario is for object 124923, 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.

Bulk Update ✕

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

### Preview

	Object	Old	Merge Attribute [Size]
⋮	124922	Old	[small]
⋮		New	[small]
⋮	124923	Old	
⋮		New	[S]
⋮	124924	Old	[medium]
⋮		New	[medium]
⋮	124925	Old	
⋮		New	

Back   Next   Finish   Cancel

- Notice that two values changed in this scenario: object 124922 had its value overwritten since a value existed for the source, and object 124923 was overwritten since the source object had a value and the target value was blank. Objects 124924 and 124925 both get updated values that are the same as before, so essentially they are not overwritten.

**Bulk Update**

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

**Preview**

Object	Merge Attribute [Size]	Old	New
124922	[small]	Old	[S]
		New	[S]
124923	[S]	Old	
		New	[S]
124924	[medium]	Old	[medium]
		New	[medium]
124925	[medium]	Old	
		New	

Back **Next** Finish Cancel

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**

- Refrigerator Extras
- Refrigerator pallet
- T-shirt, case (124922)
- T-shirt, case (124923)
- T-shirt, case (124924)
- T-shirt, case (124925)
- T-shirt, pallet (mixed)
- T-shirt, pallet (M O)
- Sell Side Packaging
- External Products
- GDSN Products

**No Title**

Products References Referenced By

**▼ Packaging Hierarchy References**

Reference Type: Case To Child

Source	Reference Type	Target	Qty of Next Lower P...	Qty of Next Higher P...
T-shirt, case (124922)	Case To Child	18210 M B		36
T-shirt, case (124924)	Case To Child	18212 L B	48	96
T-shirt, case (124923)	Case To Child	18213 M O		
T-shirt, case (124925)	Case To Child	18216 L O	24	

- 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:

**Bulk Update**

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

**Preview**

Object	Old	Merge Attribute [QtyNextHigherPackage]
T-shirt, case (124922)	Old	[96]
	New	[48]
T-shirt, case (124923)	Old	
	New	[24]
T-shirt, case (124924)	Old	[36]
	New	[36]
T-shirt, case (124925)	Old	
	New	

Back Next Finish Cancel

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.

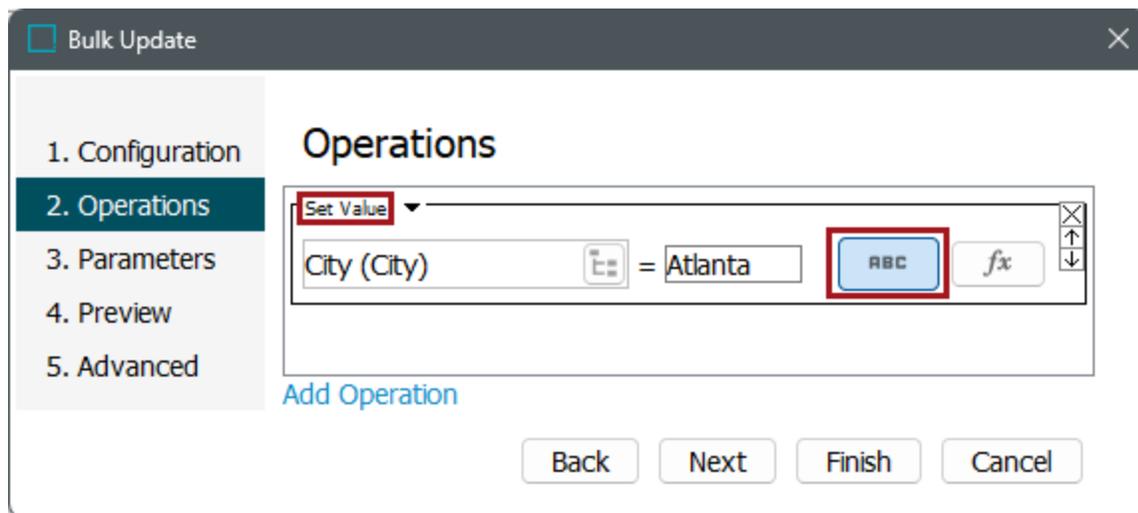
## Configuration

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

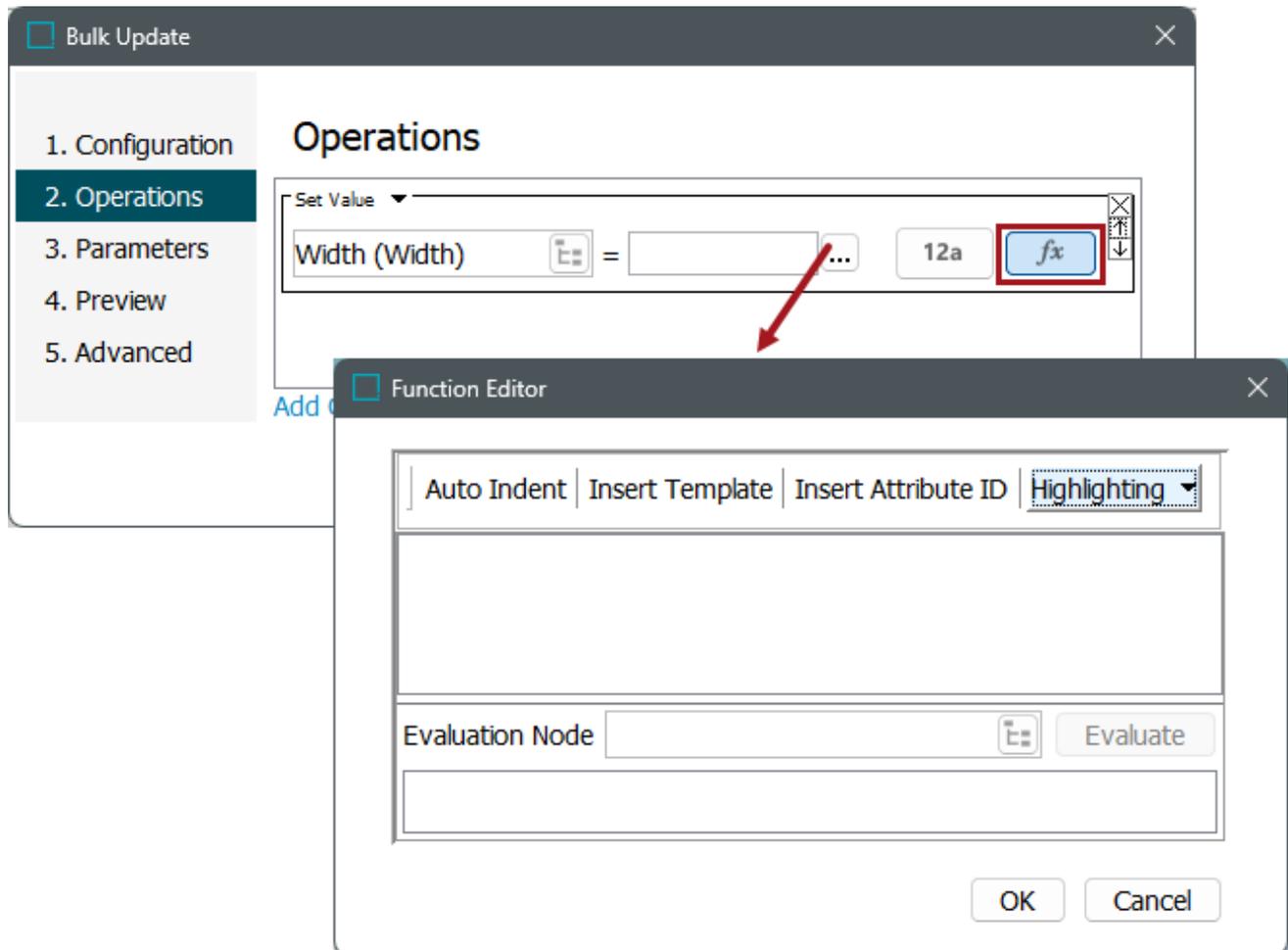
- For manual selection, the Select Attribute dialog is displayed, select an attribute, and click **Select**.



- 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 documentation for more information on

writing functions.

3. For the second parameter (=), click the manual (**ABC**) button or the function (**fx**) 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 documentation for more information on writing functions.



## Data Containers: Update Data Containers Operation

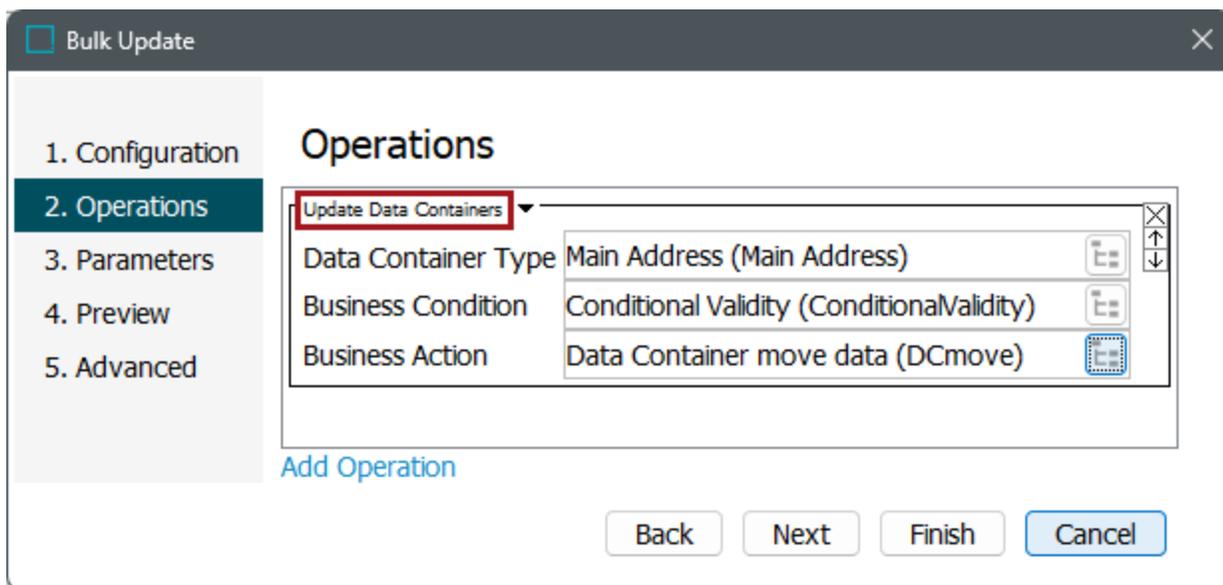
This operation is available for Data Containers. For more information on Data Containers, refer to the Data Containers topic in the System Setup documentation.

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.



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

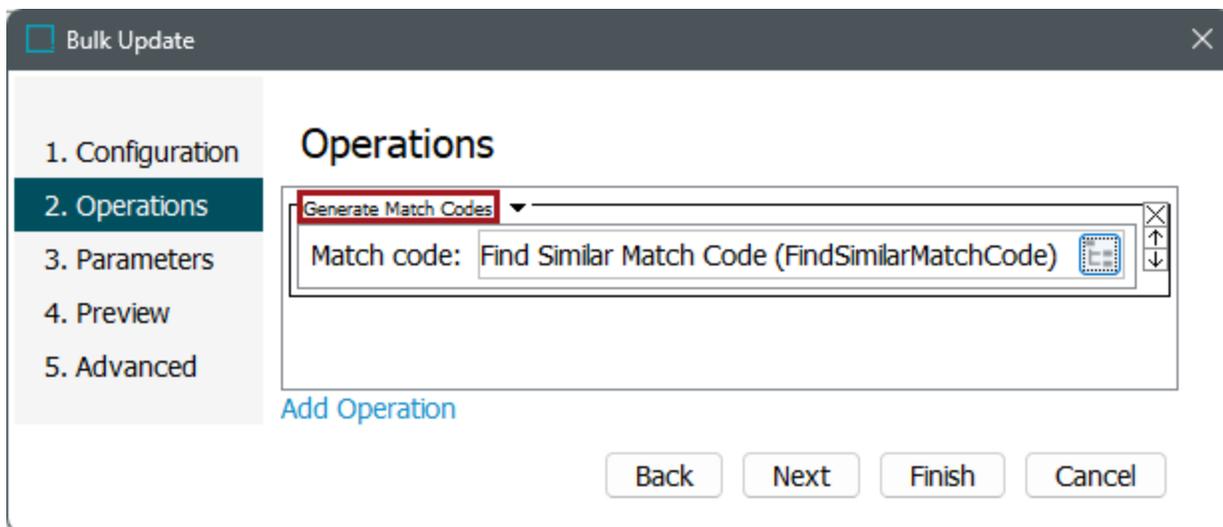
This operation can also be run via the business rules functionality, as described in the Business Action: Generate Match Codes topic in the Business Rules documentation.

## 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 selector 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

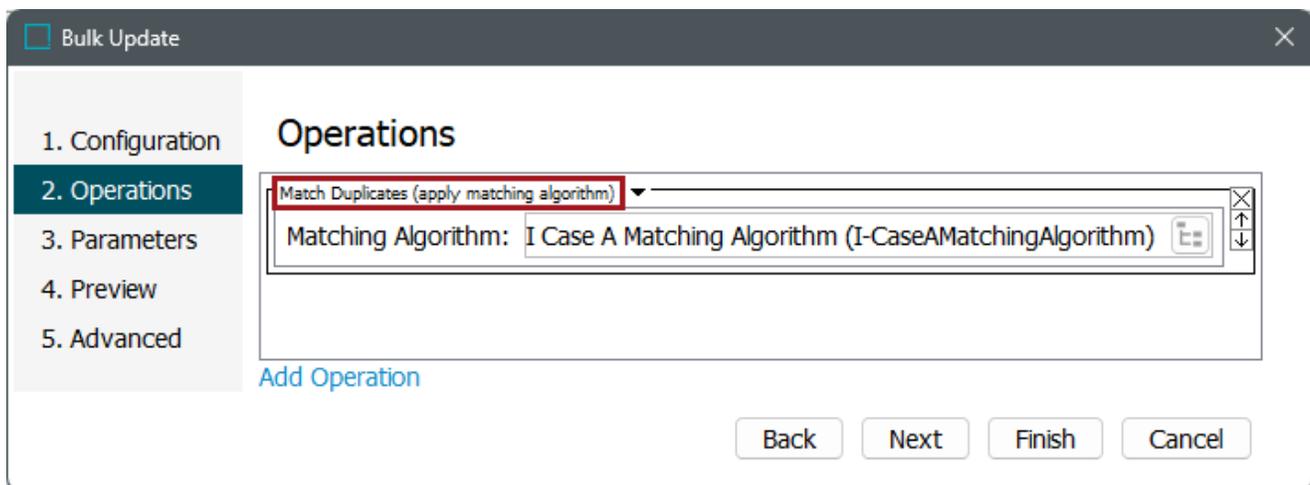
**DEPRECATED.** Instead, use 'Send Republish Event' to Event Processor configured to apply matching using user's matching algorithm, as defined in the Send Republish Event Operation topic.

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 selector 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

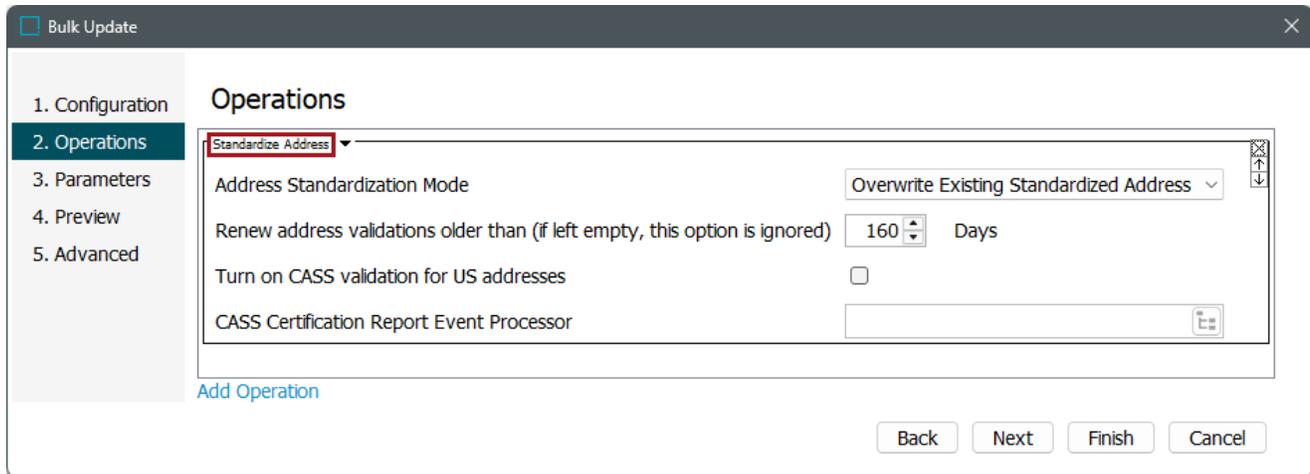
Before a Standardize Address bulk update operation can be run, the following conditions must be met:

- 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 Data Integration 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 Data Integration 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.

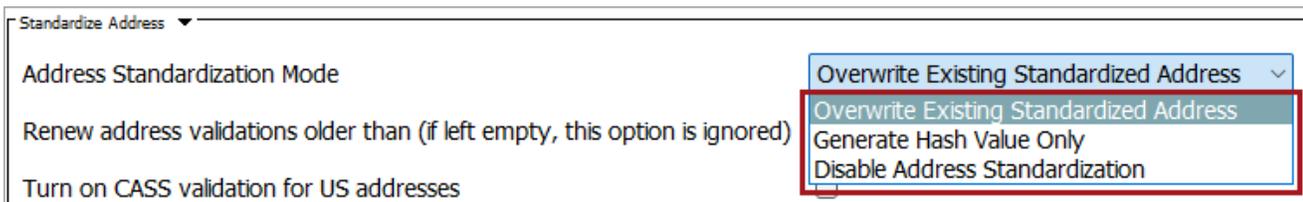
1. Select **Standardize Address** from the dropdown.



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.

Axel Kiers Vej 11			
Address • Revision: 0.8			
Address    Data Containers    References    Referen			
⋮	Street	ABC	Axel Kiers Vej
⋮	Validation Hash	ABC	-16 18871087
⋮	Zip	12a	8270

- 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.'

Standardize Address ▾

Address Standardization Mode Overwrite Existing Standardized Address ▾

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

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

Tree

- Customer Hierarchy
  - Customer A
  - Customer B
    - 3550 George Busbee Pkwy
    - John Smith
  - Customer C
  - Customer D

3550 George Busbee Pkwy  
Address • Revision: 0.1

Address    Data Containers    References    Referenced By

Street	RBC	
Validation Time	RBC	2024-06-09 09:41:15
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 selector 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 System Setup documentation.

## Merge Golden Records: Merge Clerical Review Tasks

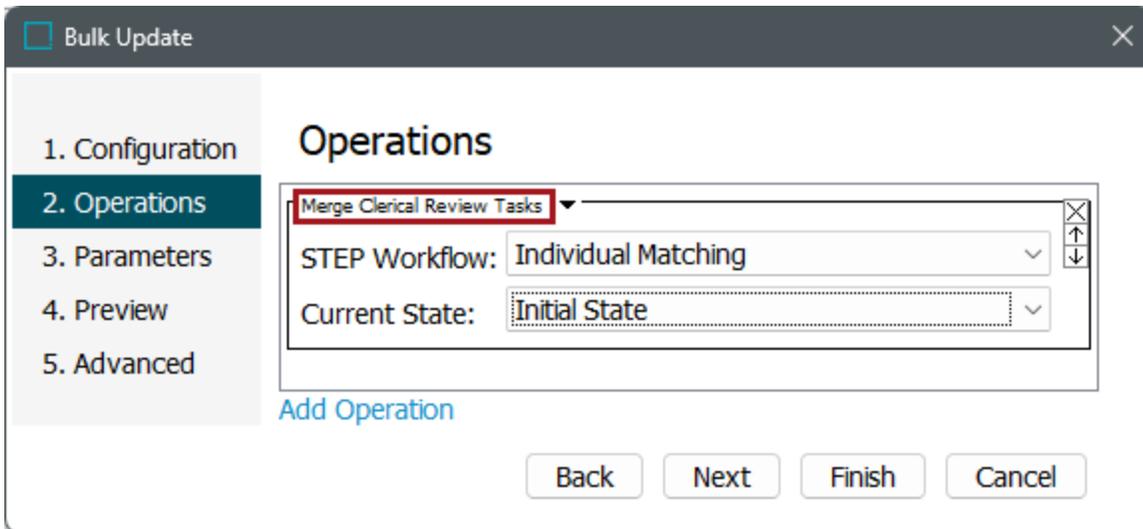
This operation is available for Merge Golden Records. For more information on a golden records merge solution, refer to the Match and Merge topic in the Matching, Linking, and Merging documentation.

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**.
2. Use the dropdowns to select the required configurations.



The screenshot shows the 'Bulk Update' wizard window. On the left is a navigation pane with steps: 1. Configuration, 2. Operations (selected), 3. Parameters, 4. Preview, and 5. Advanced. The main area is titled 'Operations' and contains a dropdown menu with 'Merge Clerical Review Tasks' selected. Below this are two more dropdowns: 'STEP Workflow' set to 'Individual Matching' and 'Current State' set to 'Initial State'. At the bottom of the main area is an 'Add Operation' link. At the very bottom of the window are four buttons: 'Back', 'Next', 'Finish', and '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.

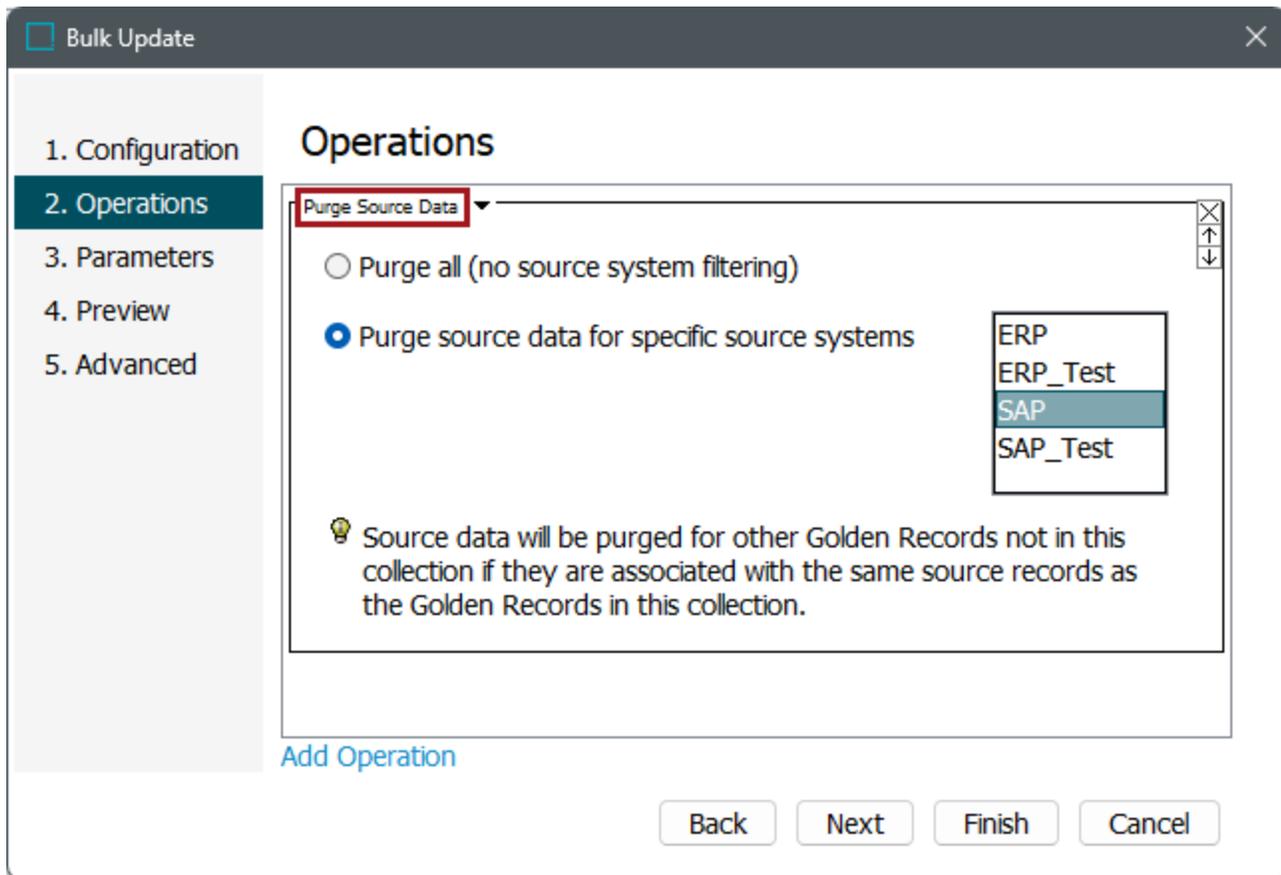
This operation allows Source Record Data for all sources or per source system to be purged for records with a current source system / record ID reference to the Golden Records.

**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**.



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

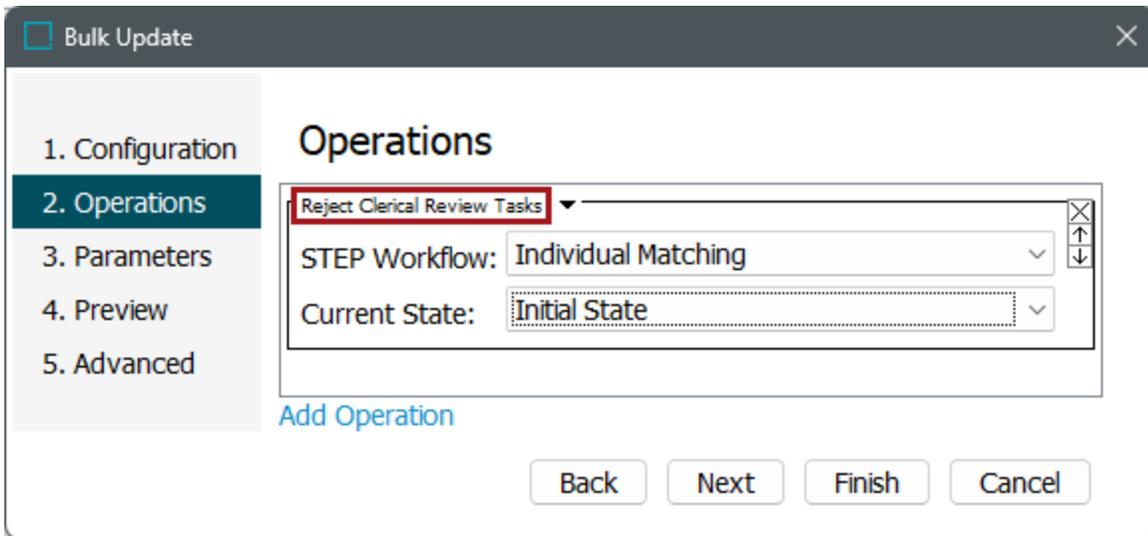
This operation is available for Merge Golden Records. For more information on a golden records merge solution, refer to the Match and Merge topic in the Matching, Linking, and Merging documentation.

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**.
2. Use the dropdowns to select the required configurations.



The screenshot shows the 'Bulk Update' wizard window. On the left is a navigation pane with five steps: 1. Configuration, 2. Operations (selected), 3. Parameters, 4. Preview, and 5. Advanced. The main area is titled 'Operations' and contains a list of operations. 'Reject Clerical Review Tasks' is selected and highlighted with a red box. Below it are two dropdown menus: 'STEP Workflow' set to 'Individual Matching' and 'Current State' set to 'Initial State'. There is an 'Add Operation' link below the list. At the bottom of the window are four buttons: 'Back', 'Next', 'Finish', and '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.

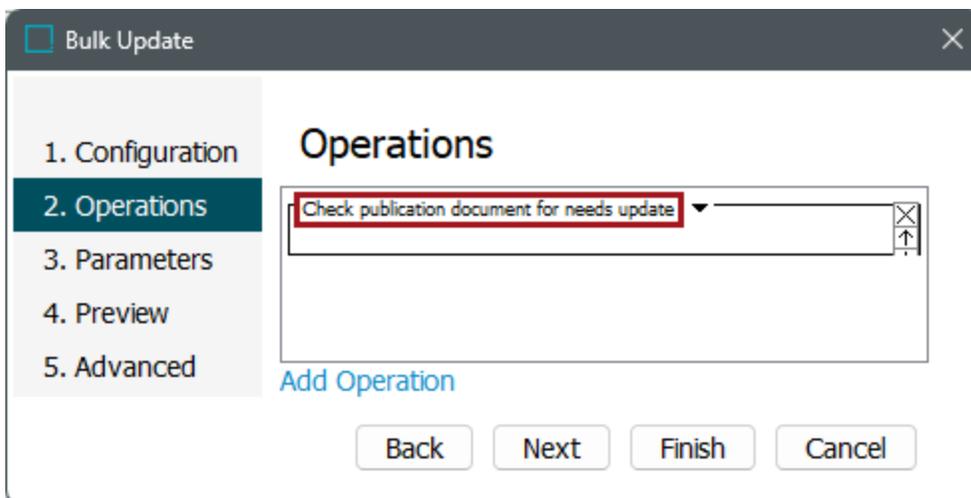
Checking documents for updates from within STEP Workbench is primarily useful for Print AutoPage and Print Flatplanner publications. Since near-identical functionality can be accessed from other locations in the workbench (including right-clicking on a publication or section object in the Tree and clicking '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 Publisher (Adobe InDesign Integration) documentation
- Updating Documents in Flatplanner in the Publisher (Adobe InDesign Integration) documentation

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

## Configuration

1. From the dropdown, click Publishing and select **Check Publication Document for Needs Update**.



2. No parameter configuration is required.

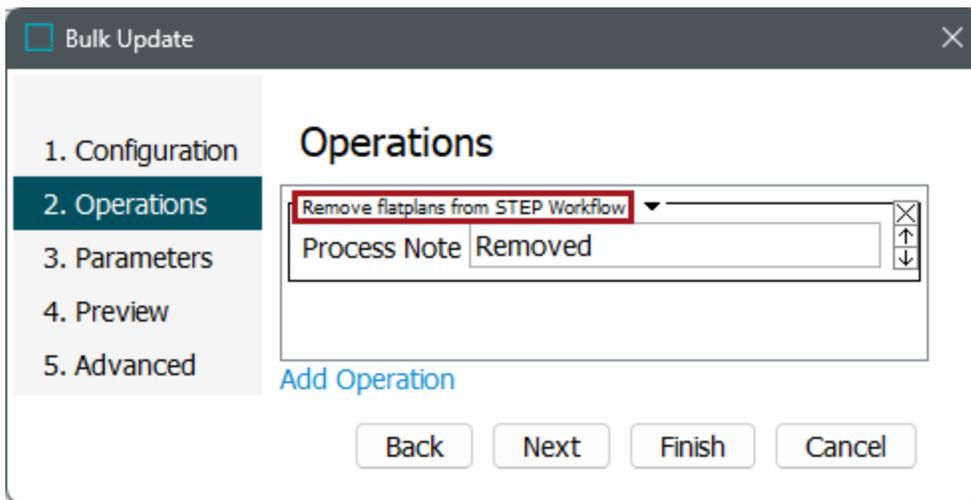
# Publishing: Remove Flatplans from STEP Workflow Operation

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. From the dropdown, click Publishing and select **Remove Flatplans from STEP Workflow**.



2. For the **Process Note** parameter, add text to be displayed in 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 the File menu, highlight the 'Bulk Update' option and then select the 'Run Bulk Update' option.

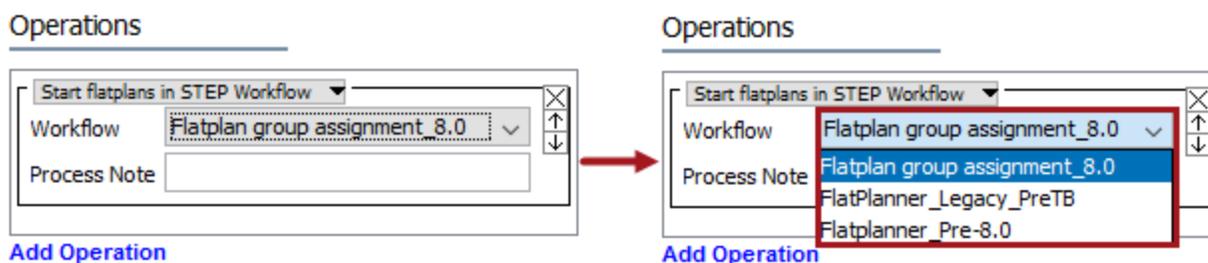
For more information on the Bulk Update wizard, refer to the Creating a Bulk Update topic.

### Configuration

1. From the dropdown, click Publishing and select **Start Flatplans in STEP Workflow**.
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, add text to be displayed in the background process.

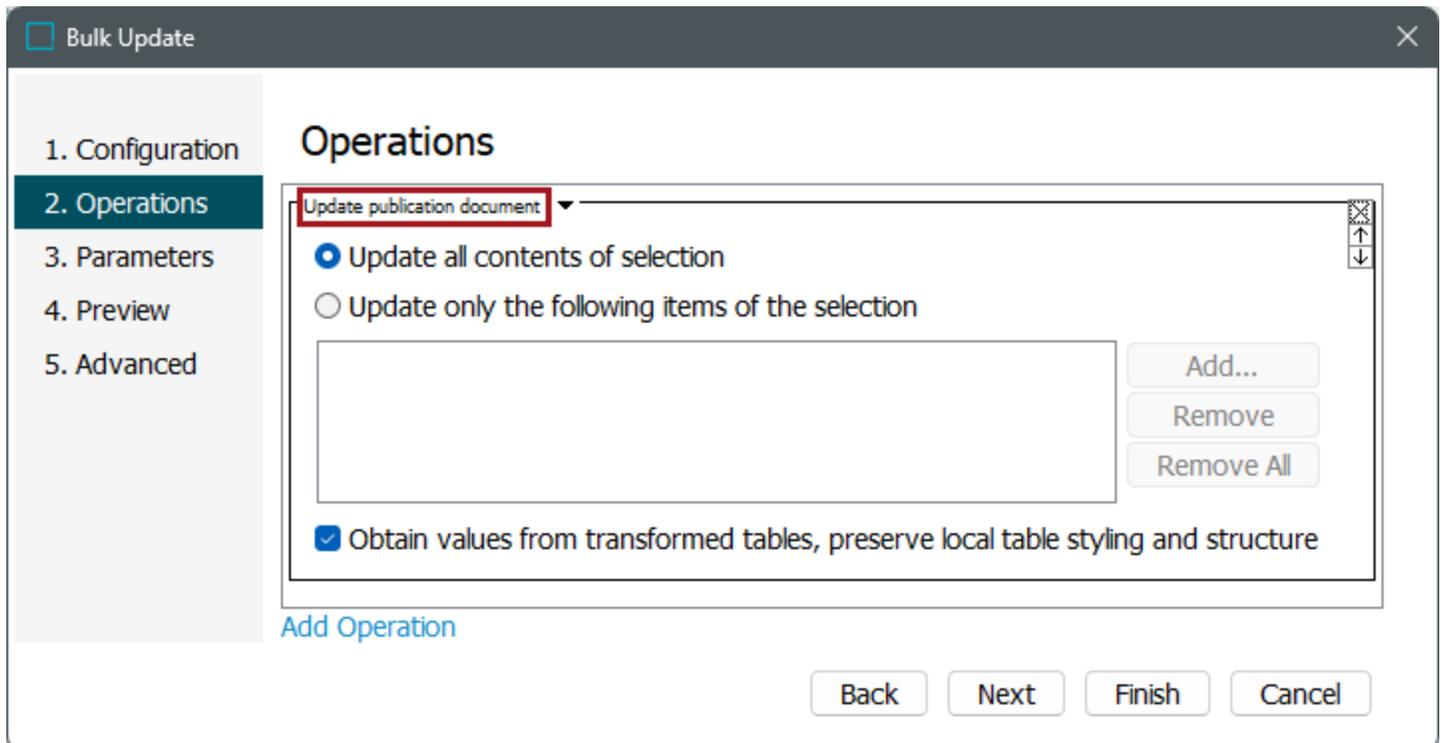
## Publishing: Update Publication Document Operation

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 topic 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. From the dropdown, click Publishing and select **Update Publication Document**.



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.

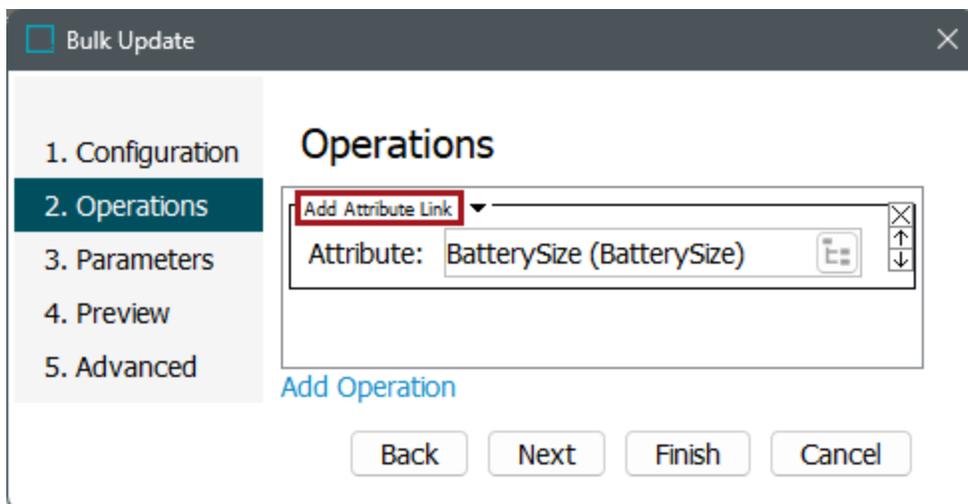
### Prerequisites

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. From the dropdown, click References and Links and select **Add Attribute Link**.



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

### Example

The following images show before (with gray read-only cells) and after (with white editable cells) the 'BatteryType' Add Attribute Link bulk update is run.

The screenshots show the 'Flashlight Items' product hierarchy in the STIBO SYSTEMS interface. The top screenshot shows the 'BatteryType' attribute as a read-only cell (gray), while the bottom screenshot shows it as an editable cell (white) after a bulk update. A red arrow points from the 'BatteryType' cell in the bottom screenshot to the 'BatteryType' cell in the top screenshot.

**Tree**

- Task Lighting
  - Flashlights
    - Flashlight Items
      - Green Flashlight
      - Red flashlight
      - Blue Flashlight
      - Flashlight C Batteries
      - Today Red Light

**Flashlight Items**  
Item Folder • 8% Complete • Revision: 0.10

Product Data Containers Product Variants Sub Products References Referenced By Image

▼ **Linked Attributes from Product Hierarchy**

DisplaySequence	ID	Name	Product Variant Priority
⋮	BatteriesIncluded	Batteries Included	
⋮	BatteryType	Battery Type	

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

Add Reference and Add Referenced By have similar configurations for bulk updates.

- The **Add Reference** operation adds a reference of a specified type to a target.
- 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.

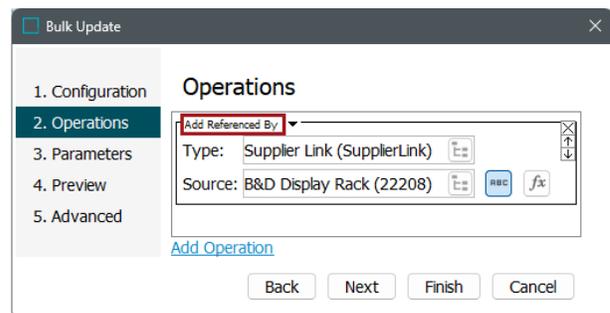
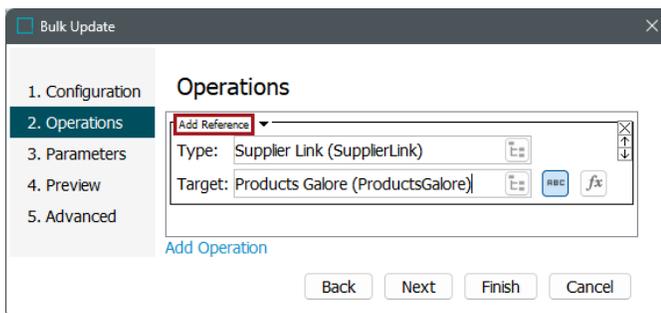
This operation can also be run via the business rules functionality, as described in the Business Action: Add Reference topic and the Business Action: Add Referenced By topic in the Business Rules documentation.

## 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. From the dropdown, click References and Links and select **Add Reference** or **Add Referenced By**.



2. For the **Type** parameter, click the selector 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.

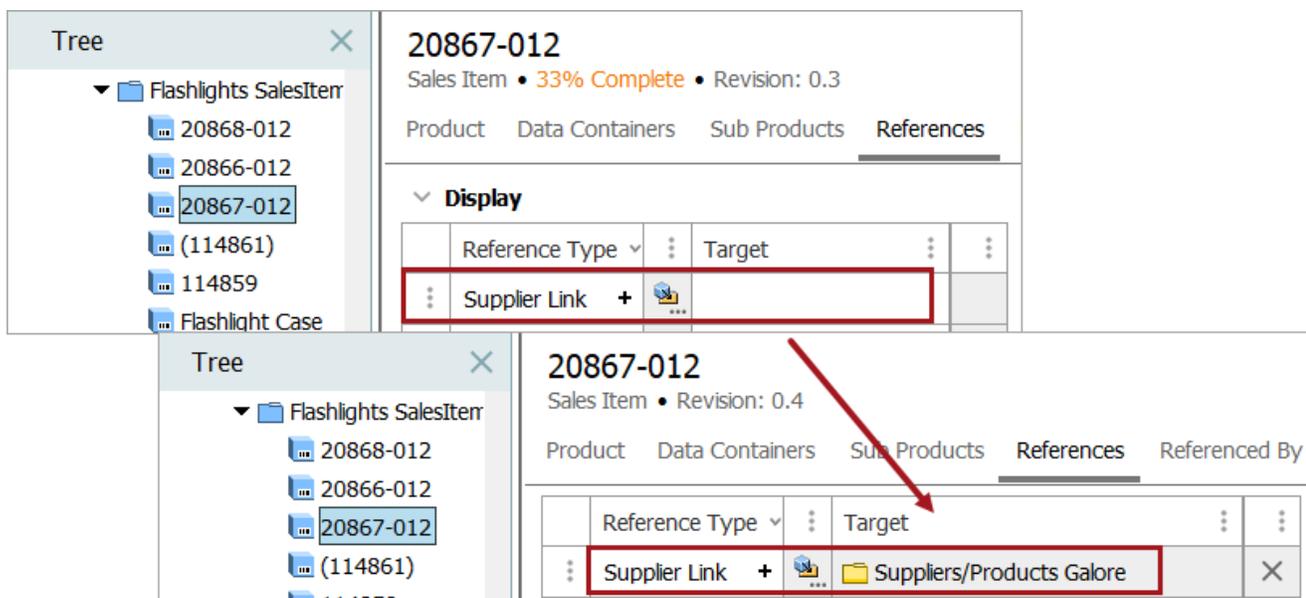


**Note:** The selected object dictates the label on the manual button. If the selected object requires a text value, the label is 'abc.' If the selected object is numeric, '123' is displayed, and so on for each validation base type.

- For manual selection, click the 'abc' button (  ), click the selector 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 (  ), click the selector 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 documentation.

## Examples

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



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

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.

Tree

- ▼ Cotton T-Shirts
  - 297361
  - 297408
  - 297624
  - 354402
  - 355326

**297408**  
Item • 13% Complete • Revision: 0.8

Product    Data Containers    Sub Products    Ref

	Name			Value
	Product image	ABC		190426

Bulk Update

1. Configuration

**2. Operations**

3. Parameters

4. Preview

5. Advanced

### Operations

Add Reference ▼

Type: Primary Product Image (PrimaryProductImage)

Target: prodval("Product image")

Add Operation

Back
Next
Finish
Cancel

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.

**HanesGrayT**  
Product Image • Revision: 1.1

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

▼ **Image References**

	Reference Type		Source		Thumbnail		ID		Name	
	Primary Product Image	+	297408				297408		297408	✕

## 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.

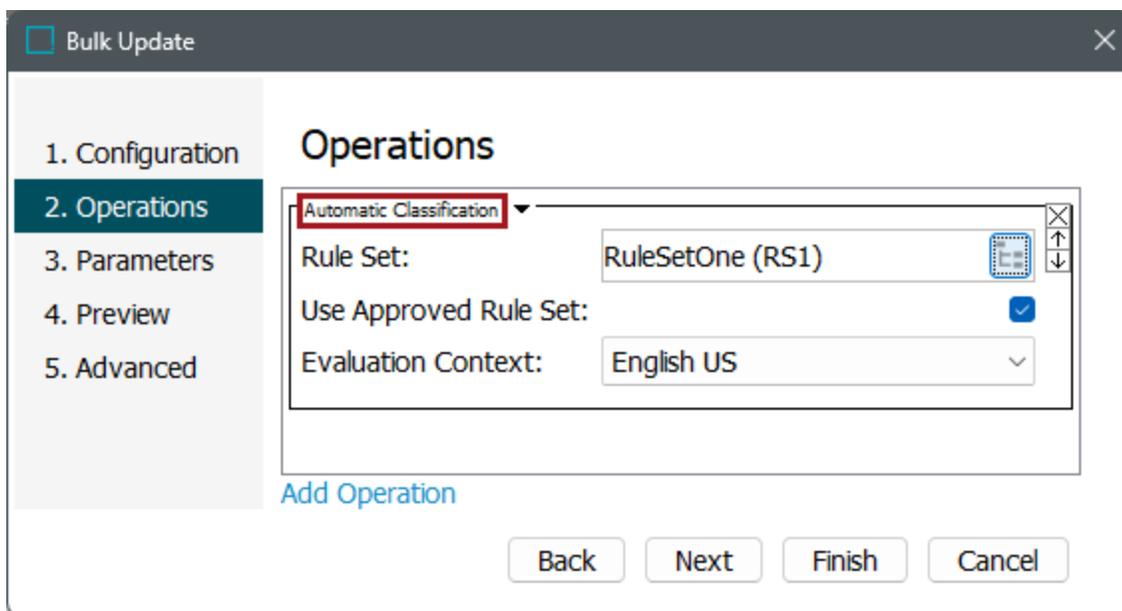
### Prerequisites

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. From the dropdown, click References and Links and select **Automatic Classification**.



2. For the **Rule Set** parameter, click the selector 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.

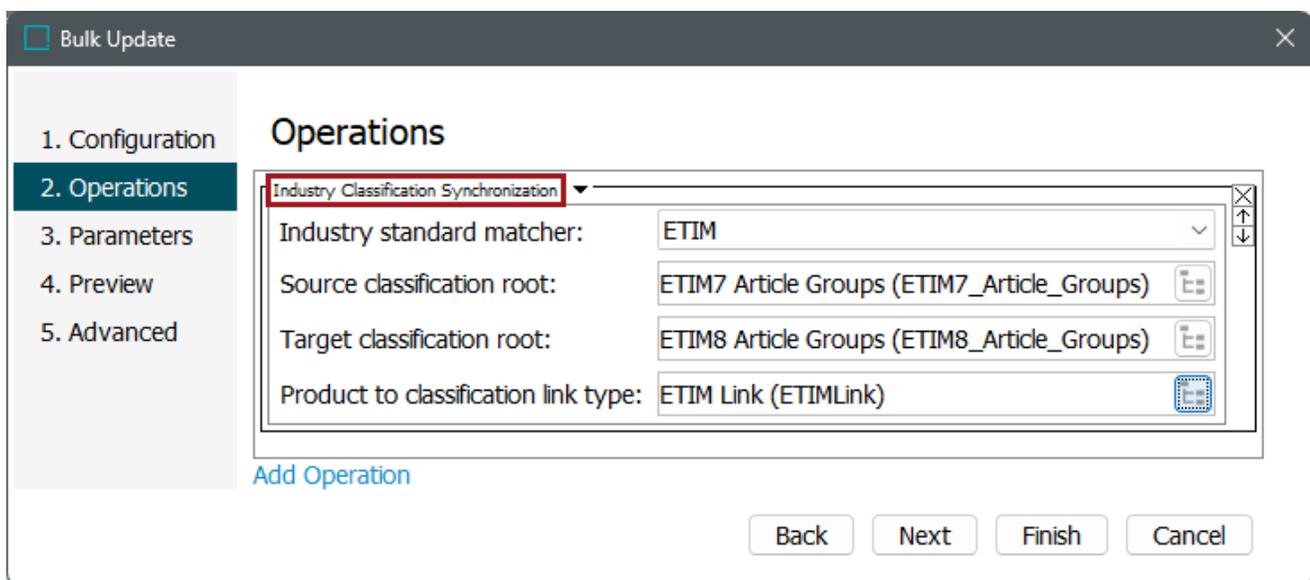
# References and Links: Industry Classification Synchronization Operation

This operation allows users to reclassify products when adding an additional version of eCI@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 eCI@ss, ETIM, or UNSPSC classification hierarchy, and run the bulk update wizard.
2. From the dropdown, click References and Links and select **Industry Classification Synchronization**.



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 selector button (🔍), select the classification root node for the original industry classification version, and click **Select**.
5. In the **Target classification root** parameter, click the selector 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 selector button () , select the product to classification link type the products use to link into the classification hierarchy, and click **Select**.

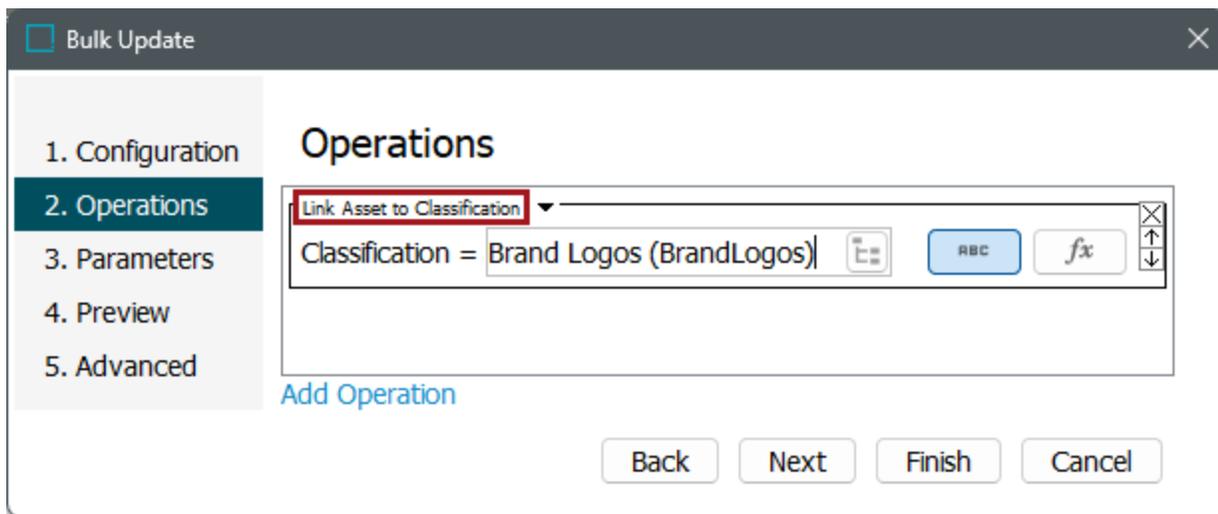
## References and Links: Link Asset to Classification Operation

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. From the dropdown, click References and Links and select **Link Asset to Classification**.

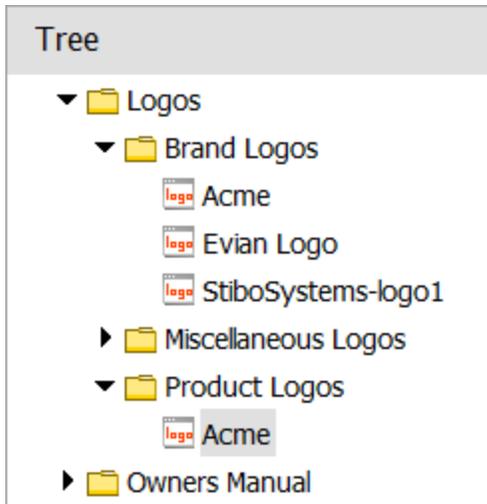


3. In the **Classification** parameter, use one of these methods to select the relevant classification.

**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 , and click the selector button  to display the Select Classification dialog. Select a classification object and click **Select**.
- For function selection, click the 'fx' button , click the selector 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 documentation.

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.

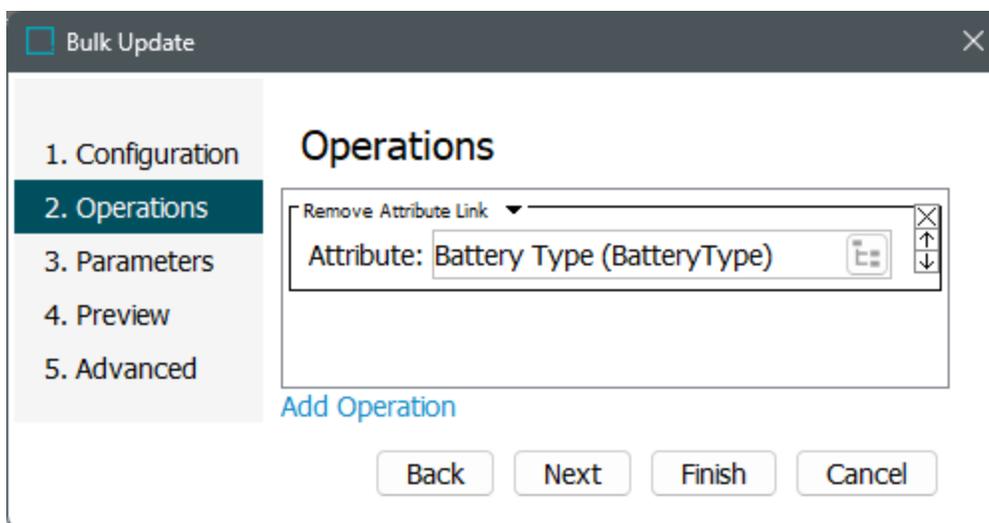
This operation can also be run via the business rules functionality, as described in the [Business Action: Remove Attribute Link](#) topic in the [Business Rules](#) documentation.

### 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. From the dropdown, click **References and Links** and select **Remove Attribute Link**.



2. For the **Attribute** parameter, click the selector 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 (with white editable cells) and after the 'BatteryType' Remove Attribute Link bulk update is run (with gray read-only cells).

Tree

- ▼ Task Lighting
  - ▼ Flashlights
    - Flashlight Items
      - Green Flashlight
      - Red flashlight
      - Blue Flashlight
      - Flashlight C Batteries
      - Today Red Light

### Flashlight Items

Item Folder • 8% Complete • Revision: 0.10

Product   Data Containers   Product Variants   Sub Products   References   Referenced By   Image

▼ **Linked Attributes from Product Hierarchy**

DisplaySequence	ID	Name	Product Variant Priority
⋮	BatteriesIncluded	Batteries Included	
⋮	BatteryType	Battery Type	

Tree

- ▼ Task Lighting
  - ▼ Flashlights
    - Flashlight Items
      - Green Flashlight
      - Red flashlight
      - Blue Flashlight
      - Flashlight C Batteries
      - Today Red Light

### Flashlight Items

Item Folder • 8% Complete • Revision: 0.10

Product   Data Containers   Product Variants   Sub Products   References   Referenced By   Image

▼ **Linked Attributes from Product Hierarchy**

DisplaySequence	ID	Name	Product Variant Priority
⋮	BatteriesIncluded	Batteries Included	
⋮	BatteryType	Battery Type	

## References and Links: Remove Reference Operation

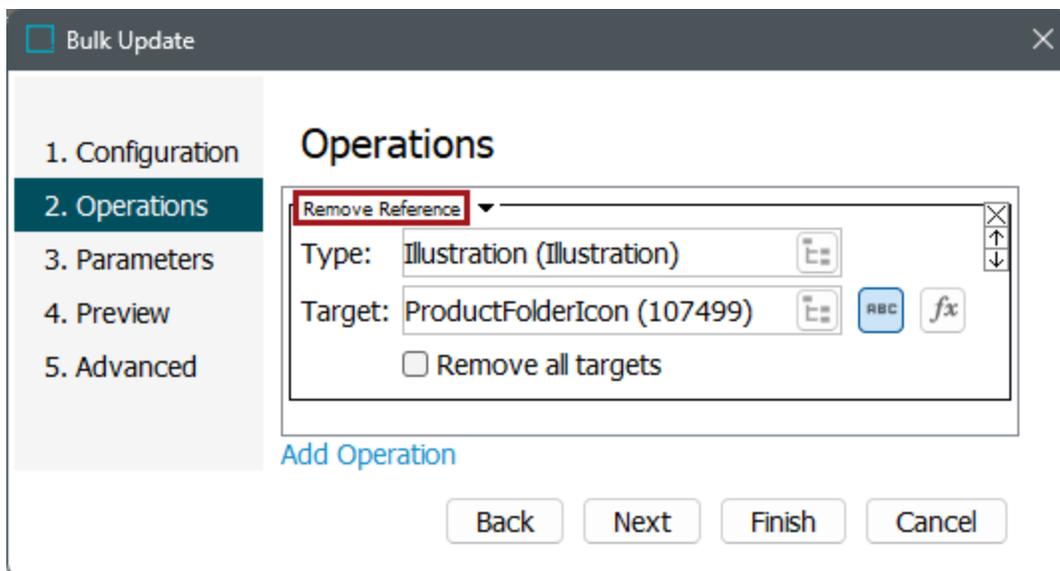
This operation removes references to a specific target or all references of a specific type.

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. From the dropdown, click **References and Links** and select **Remove Reference**.



2. For the **Type** parameter, click the selector 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.

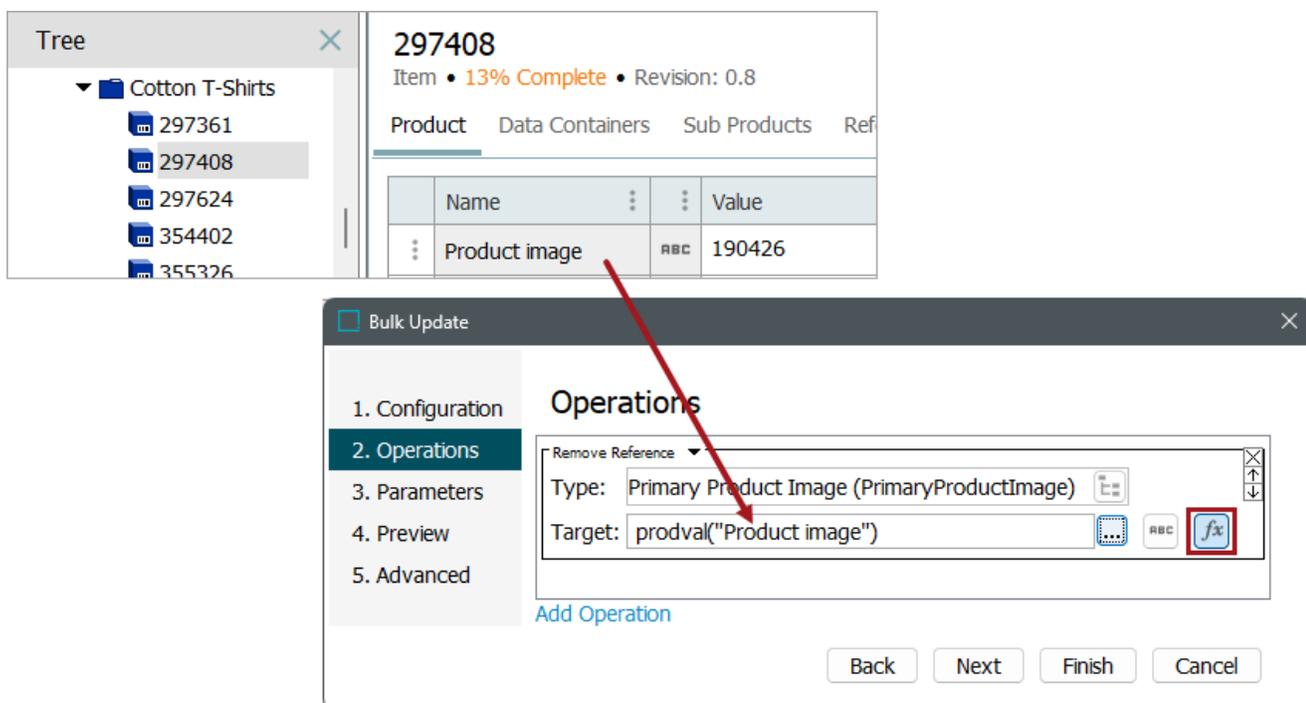
- Click the 'abc' button (  ), click the selector button (  ) to display the Select Reference Target picker, select a valid target, and click the **Select** button.
- Click the 'fx' button (  ), click the selector button (  ) to display the Function Editor dialog, write a function to select a valid target, and click the **Select** button. For more information, refer to the Using Function Editor topic in the Resource Materials online help documentation.

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.

### Example

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



The screenshot shows a 'Bulk Update' dialog with the following configuration:

- Tree:** Cotton T-Shirts (297361, 297408, 297624, 354402, 355326)
- Item:** 297408 (13% Complete, Revision: 0.8)
- Table:**

Name	Value
Product image	190426
- Dialog Configuration:**
  - Operations:** Remove Reference
  - Type:** Primary Product Image (PrimaryProductImage)
  - Target:** prodval("Product image")
  - Buttons:** abc, fx (highlighted with a red box), selector

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 ✕

- ▼ T-shirts
  - ▼ T-shirts Items
    - ▶ 88723-12
      - ▼ Cotton T-Shirts
        - 297361
        - 297408
        - 297624
        - 354402

**297408**  
Item • 13% Complete • Revision: 0.8

Product Data Containers Sub Products References Referenced By Images & Docu

▼ **Image References**

Reference Type	Target	Thumbnail
Primary Product Image +	HanesGrayT	

Tree ✕

- ▼ T-shirts
  - ▼ T-shirts Items
    - ▶ 88723-12
      - ▼ Cotton T-Shirts
        - 297361
        - 297408
        - 297624
        - 354402

**297408**  
Item • 13% Complete • Revision: 0.8

Product Data Containers Sub Products References Referenced By Images & Docu

▼ **Image References**

Reference Type	Target	Thumbnail
Primary 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.

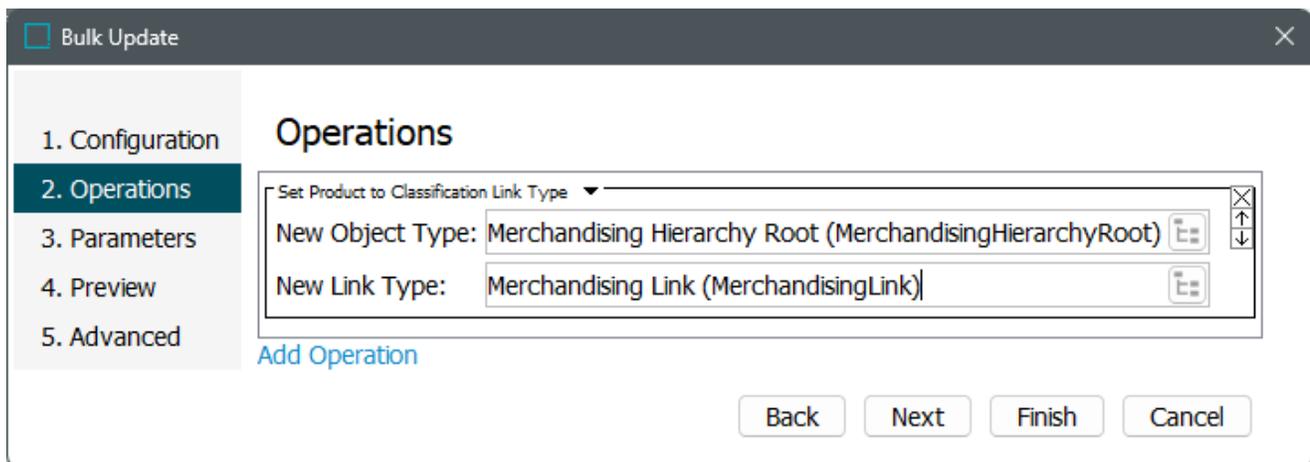
This operation can also be run via the business rules functionality, as described in the Business Action: Set Product to Classification Link Type topic in the Business Rules documentation.

## 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. From the dropdown, click References and Links and select **Set Product to Classification Link Type**.



- In the **New Object Type** parameter, click the selector button ( ) to display the Select Object Type dialog, select the classification, and click the **Select** button.
- In the **New Link Type** parameter, click the selector 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.'

The screenshot shows the 'System Setup' dialog with three main panes:

- Left Pane:** A tree view of the system hierarchy. Under 'Web Hierarchy Root', 'Website Root' is expanded to show 'Web Level 1', 'Web Level 2', and 'WebLevel3'. 'Assets' is also expanded to show 'Availability', 'Basic Object Types', 'Commercial Types', and 'Entity user-type root'.
- Top Right Pane:** 'Web Hierarchy Root' configuration. Under 'Objects of this Object Type', a table lists:
 

ID	Name
Website1	Website
WebHierarchyRoot	Web Sites US
- Bottom Right Pane:** 'Merchandising Hierarchy Root' configuration. Under 'Objects of this Object Type', a table lists:
 

ID	Name
MerchandisingHierarchy1	Merchandising Hierarchy1
MerchandisingHierarchyRoot	Merchandising Hierarchy

 Under 'Parents', a table lists:
 

ID	Name
Classification 1 user-type root	Alternate Classifications

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

The 'Bulk Update' dialog shows a 'Preview' section with a table of changes:

Object	Old	New
Website Root	ObjectType=Website Root, LinkType=Website Link	ObjectType=Merchandising Hierarchy Root, LinkType=Merchandising Link

Navigation buttons at the bottom: Back, Next, Finish, Cancel.

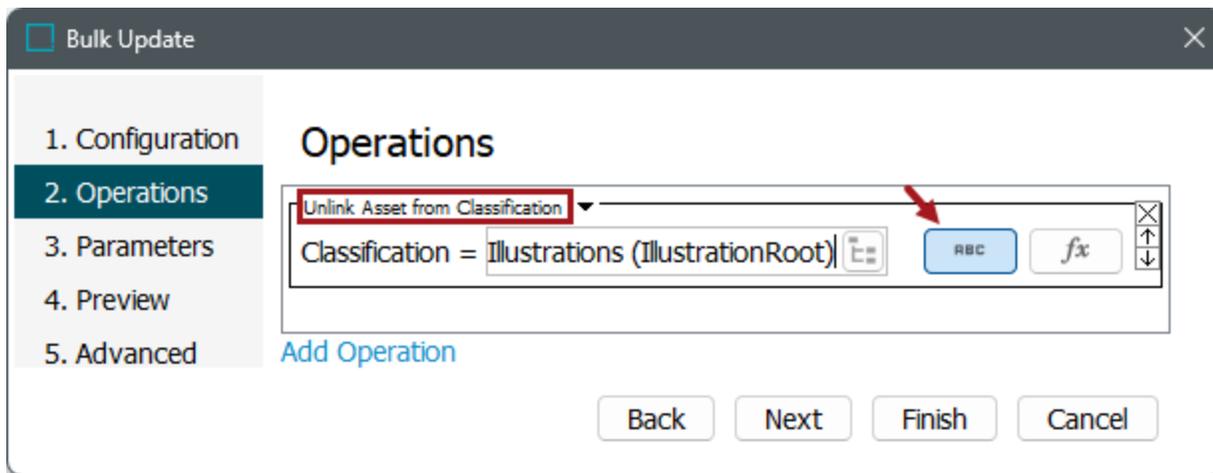
# References and Links: Unlink Asset from Classification Operation

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. From the dropdown, click References and Links and select **Unlink Asset from Classification**.



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 () , and click the selector 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 () , click the selector 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 documentation.

## 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.

The screenshot shows a 'Bulk Update' dialog box with a 'Preview' section. A red arrow points from the 'TruckIcon' item in the left-hand tree to the 'Preview' table. The 'Preview' table shows the following data:

Object	Old	New	Unlink Asset from Classification
TruckIcon	4 links	3 links	

Below the preview table, there is a table of classifications:

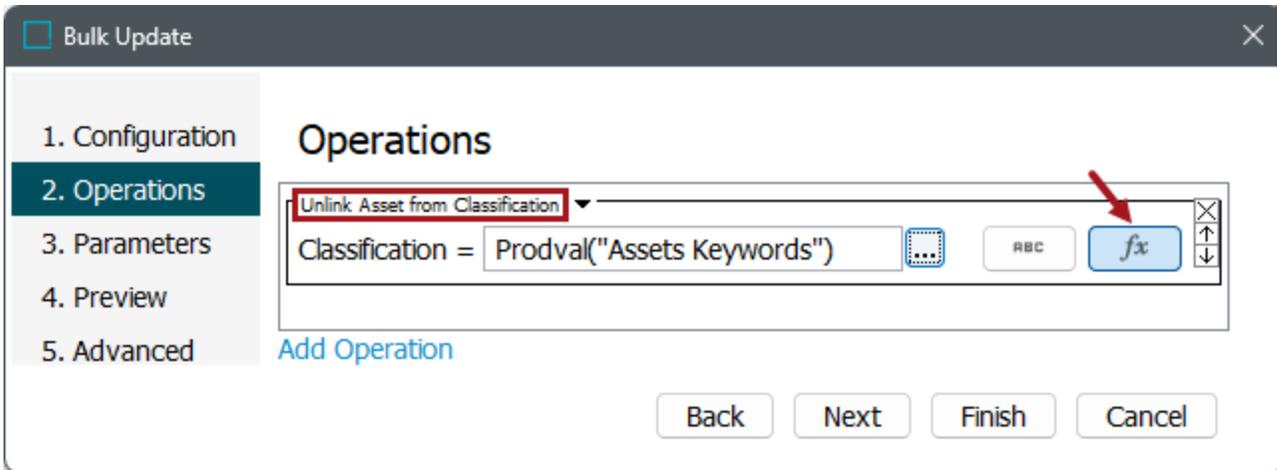
ID	Name	Object Type
AcmeAssets	Assets	Suppliers Assets
IconRoot	Icons	Icons
IllustrationRoot	Illustrations	Illustrations
LogoRoot	Logos	Logos

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.

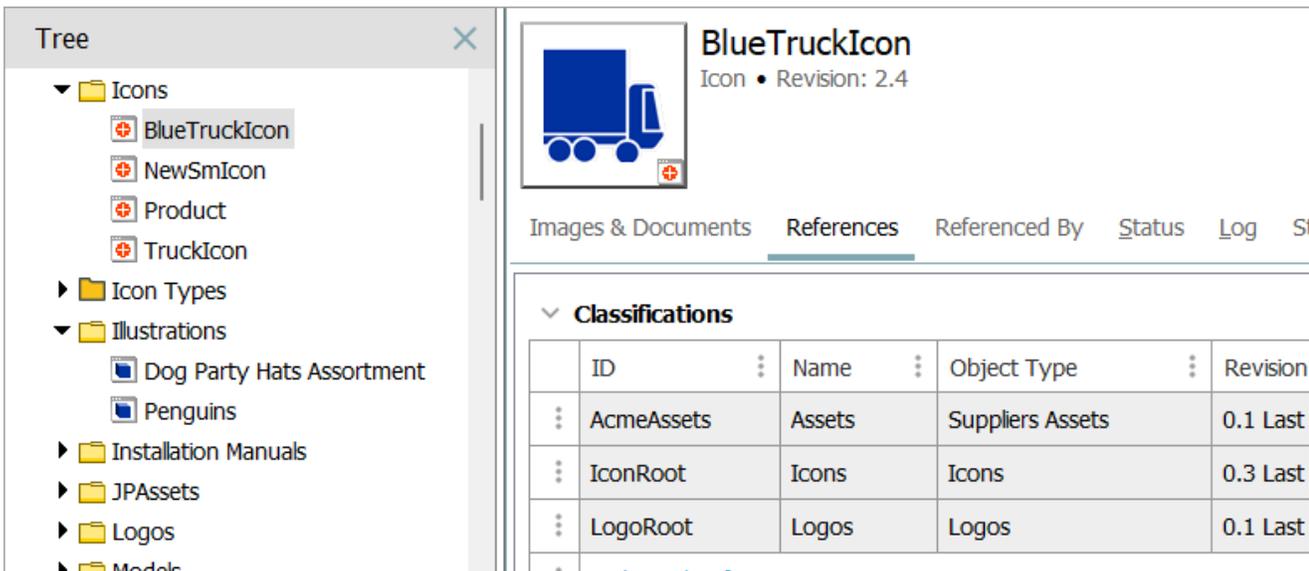
The screenshot shows the details page for the 'BlueTruckIcon' object. A red arrow points from the 'BlueTruckIcon' item in the left-hand tree to the 'Keywords' attribute in the 'Description' table. The 'Keywords' attribute is highlighted with a red box and contains the value 'IllustrationRoot'.

Name	Value
ID	120833
Name	BlueTruckIcon
Object Type	Icon
Revision	2.4 Last edited by USERJ on Mon Oct 20 13:08:15 EDT 2025
Approved	Last Approved on Tue Oct 23 15:10:56 EDT 2018
Translation	Not Translated
Path	Classification 1 root/Suppliers/Receivers/Assets/BlueTruckIcon
Keywords	IllustrationRoot

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



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



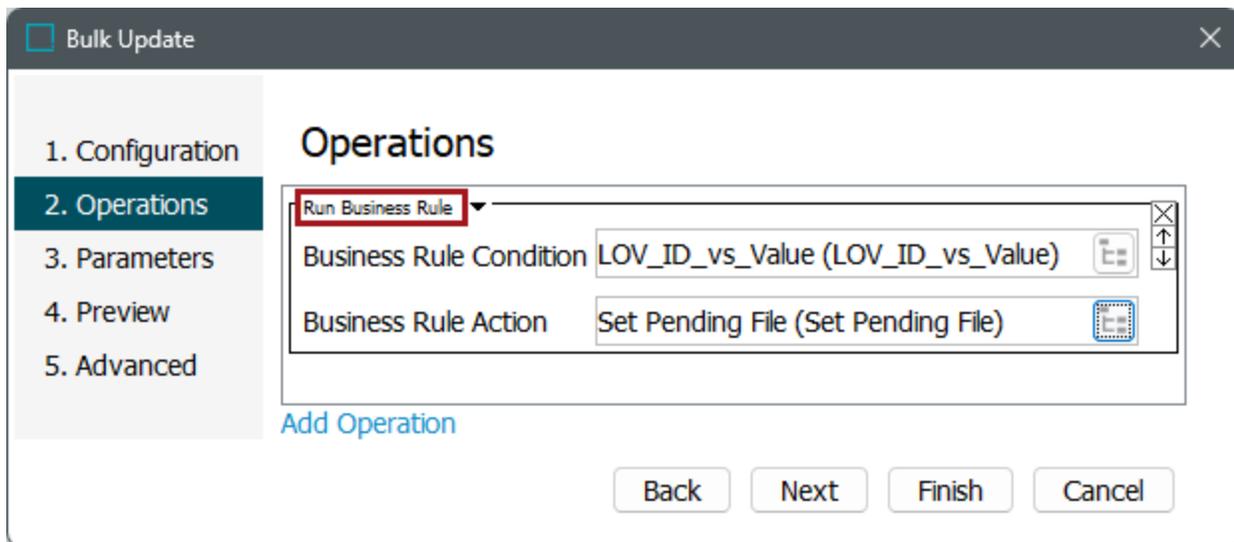
# Run Business Rule Operation

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.



2. For the 'Business Rule Condition' parameter, if a condition should be run, click the selector 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 selector 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 Data Exchange documentation.

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

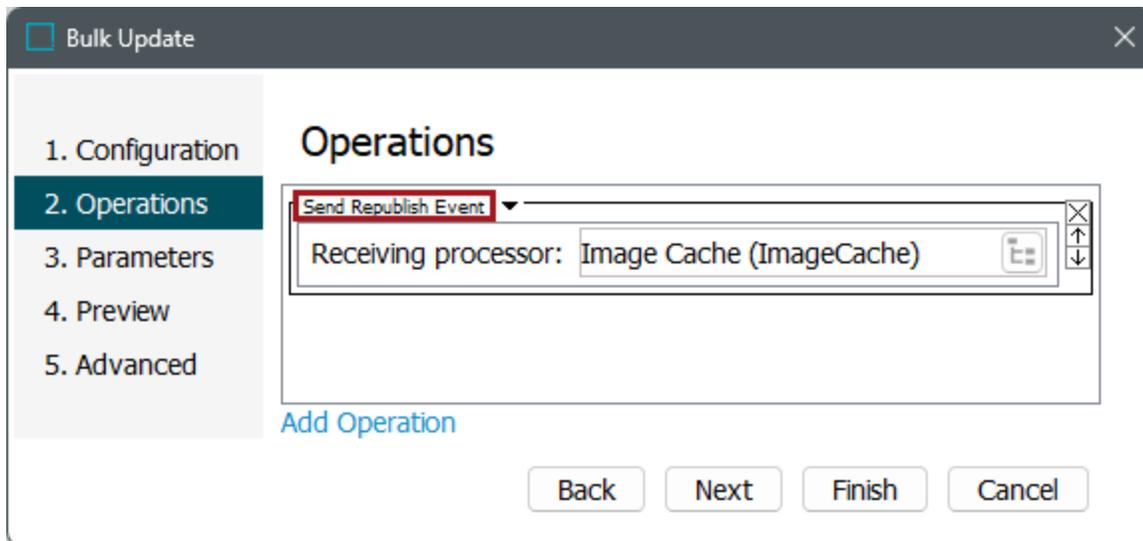
This operation can also be run via the business rules functionality, as described in the Business Action: Send Republish Event topic in the Business Rules documentation.

## 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 selector 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.

The screenshot displays the STIBO SYSTEMS interface. On the left, a 'System Setup' sidebar lists various components, with 'EventsAsCommentsApprvd' selected. The main window shows the configuration for 'EventsAsCommentsApprvd' under the 'Configuration' tab. The 'Event Queue Configuration' section includes a table with the following data:

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 (2025-10-20 13:52:23)

Overlaid on this is a 'Bulk Update' dialog box with the 'Operations' tab selected. The 'Receiving processor' field is set to 'EventsAsCommentsApprvd (EventsAsComments)'. The 'Finish' button in the dialog is highlighted with a red arrow. Below the dialog, the configuration table is updated to show:

Unread events (approximated)	1 (2025-10-20 13:58:12)
Event Mode	Standard

# Set Name Operation

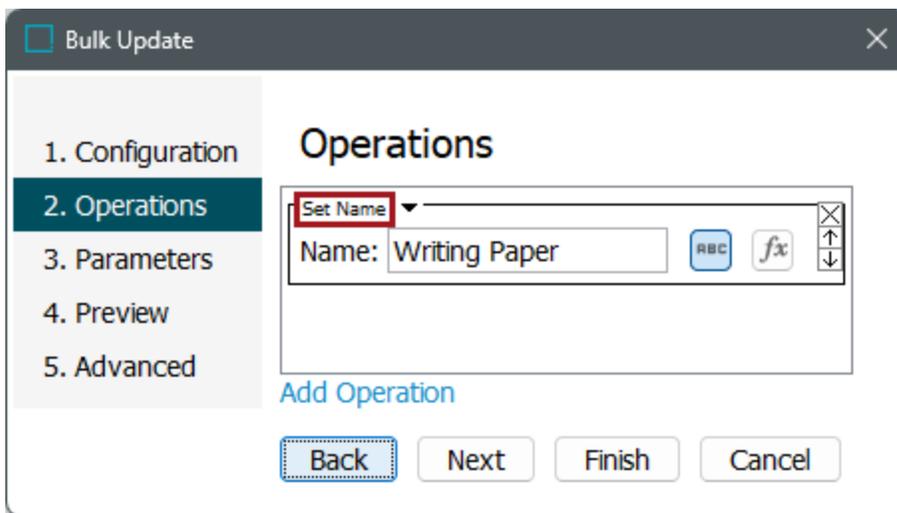
This operation sets the name of the object on which the bulk update is run. A user can either enter the name manually, or specify a function in the Function editor for naming the object.

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 () , type in a constant value that will be used to update the name.
- For function selection, click the 'fx' button () , 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 documentation.

## 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.

Blue Notebook			
Item • Revision: 0.2			
Product   Data Containers   Sub Products   References			
<b>Category Specific Attributes</b>			
	Name	:	Value
:	Primary Color	☰	Blue
<b>Item Brand Information</b>			
	Name	:	Value
:	Brand Name	ABC	Best Notebooks

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

□ Bulk Update
×

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

### Operations

Set Name
×

Name: `Concatenate(Prodval("PrimaryColor"), "-", Prodval("BrandName"))`

Add Operation

**Blue-Best Notebooks**

Item • Revision: 0.2  
 Product   Data Containers   Sub Products   References

**Description**

Name	Value
ID	155906
Name	Blue-Best Notebooks

## 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.

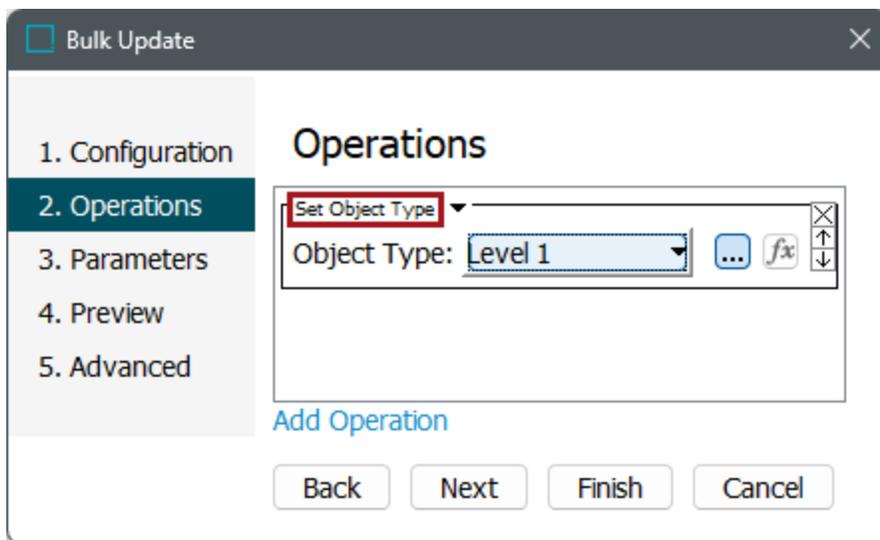
This operation can also be run via the business rules functionality, as described in the [Business Action: Set Object Type](#) topic in the Business Rules documentation.

### 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.



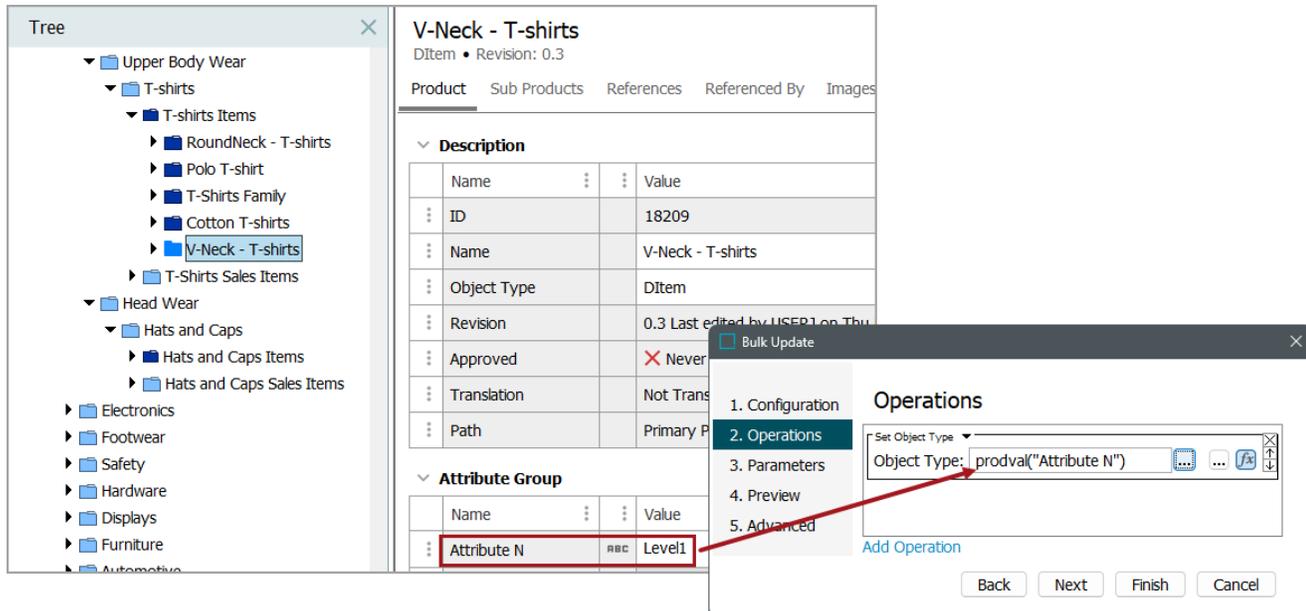
2. In the **Object Type** parameter, use one of these methods to set the relevant object type.
  - For manual selection, click the dropdown to display the available object types in your system. Choose an item from the dropdown.

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 (  ), 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 documentation.

## Example

The example below, 'Attribute 1' on the item holds the ID of an object type.



The screenshot shows the STIBO Systems interface. On the left is a 'Tree' view showing a hierarchy of products, with 'V-Neck - T-shirts' selected. The main area displays the product details for 'V-Neck - T-shirts' (Ditem, Revision: 0.3). Below the description table, there is an 'Attribute Group' table with the following data:

Name	Value
Attribute N	Level1

The 'Attribute N' cell is highlighted with a red box. A 'Bulk Update' dialog is open, showing the 'Operations' tab. The 'Object Type' field contains the formula `prodval("Attribute N")`. A red arrow points from the 'Level1' value in the attribute table to the 'Object Type' field in the dialog.

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

## V-Neck - T-shirts

Level 1 • Revision: 0.3

Product   Sub Products   References   Referenced By   Images

▼ **Description**

	Name	:	:	Value
:	ID			18209
:	Name			V-Neck - T-shirts
:	Object Type			Level 1
:	Revision			0.3 Last edited by USERJ on T

## 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.

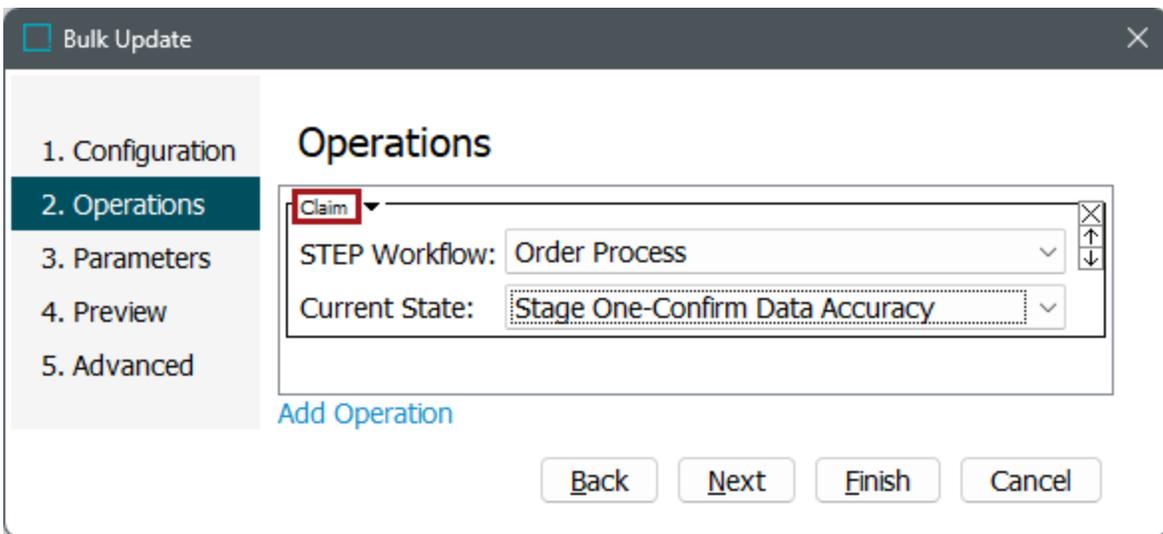
For more information on claiming bulk updates in workflows refer to the Bulk Update Operations for Workflows topic in the Workflows documentation.

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. From the dropdown, click Workflow and select **Claim**.



The screenshot shows the 'Bulk Update' wizard window. On the left is a navigation pane with steps: 1. Configuration, 2. Operations (selected), 3. Parameters, 4. Preview, and 5. Advanced. The main area is titled 'Operations' and contains a dropdown menu with 'Claim' selected. Below the dropdown are two fields: 'STEP Workflow: Order Process' and 'Current State: Stage One-Confirm Data Accuracy'. At the bottom of the main area are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'. A blue link 'Add Operation' is located below the 'Current State' field.

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.

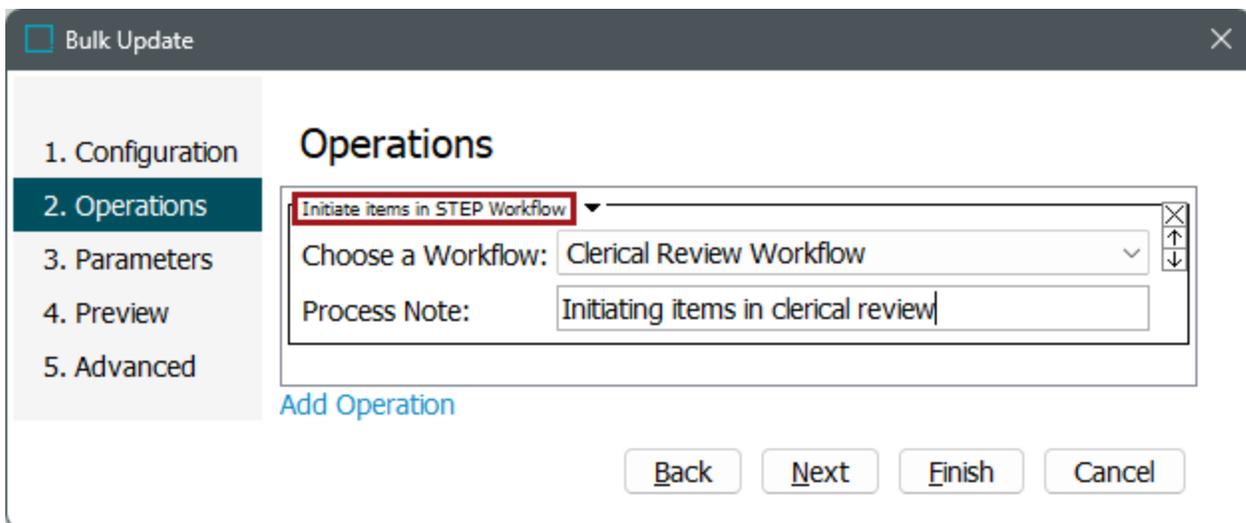
For more information on the Bulk Update wizard, refer to the Creating a Bulk Update topic.

### Prerequisite

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

### Configuration

1. From the dropdown, click **Workflow** and select **Initiate Items in STEP Workflow**.



The screenshot shows the 'Bulk Update' wizard window with the 'Operations' step selected. The 'Initiate items in STEP Workflow' option is highlighted in the dropdown menu. Below it, the 'Choose a Workflow' dropdown is set to 'Clerical Review Workflow' and the 'Process Note' field contains 'Initiating items in clerical review'. The 'Add Operation' button is visible below the form, and the 'Back', 'Next', 'Finish', and 'Cancel' buttons are at the bottom.

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 selector button  or type an ID to display a list of suggested matches and select the

desired user / user group.

**Bulk Update** [Close]

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

### Operations

**Reassign** [Close] [Up] [Down]

STEP Workflow: Contract Agreements [v]

Current State: Review [v]

User/Group: Buyer Group (BuyerGroup) [Grid Icon]

[Add Operation](#)

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

# Workflow: Remove Items from STEP Workflow Operation

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

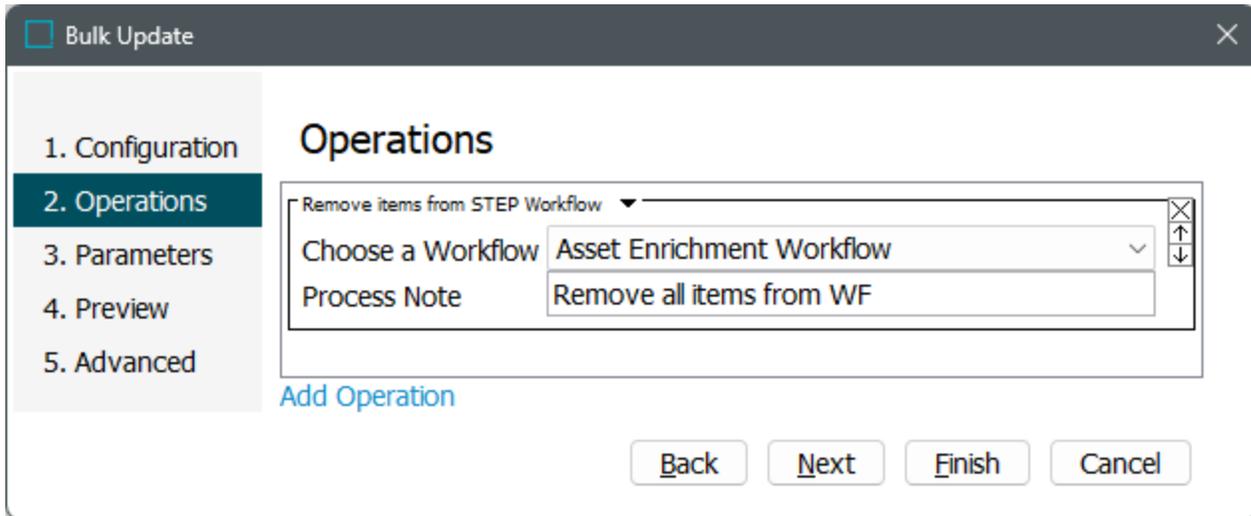
For more on how to remove items from STEP Workflows using bulk updates, refer to the Remove Objects from Workflows topic in the Workflows documentation.

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. From the dropdown, click **Workflow** and select **Remove Items from STEP Workflow**.



The screenshot shows the 'Bulk Update' wizard window. On the left, a navigation pane lists five steps: 1. Configuration, 2. Operations (highlighted), 3. Parameters, 4. Preview, and 5. Advanced. The main content area is titled 'Operations' and contains a configuration box for the 'Remove items from STEP Workflow' operation. This box has a dropdown menu currently showing 'Asset Enrichment Workflow' and a text input field for 'Process Note' with the value 'Remove all items from WF'. Below the configuration box is a blue 'Add Operation' link. At the bottom of the wizard are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

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.

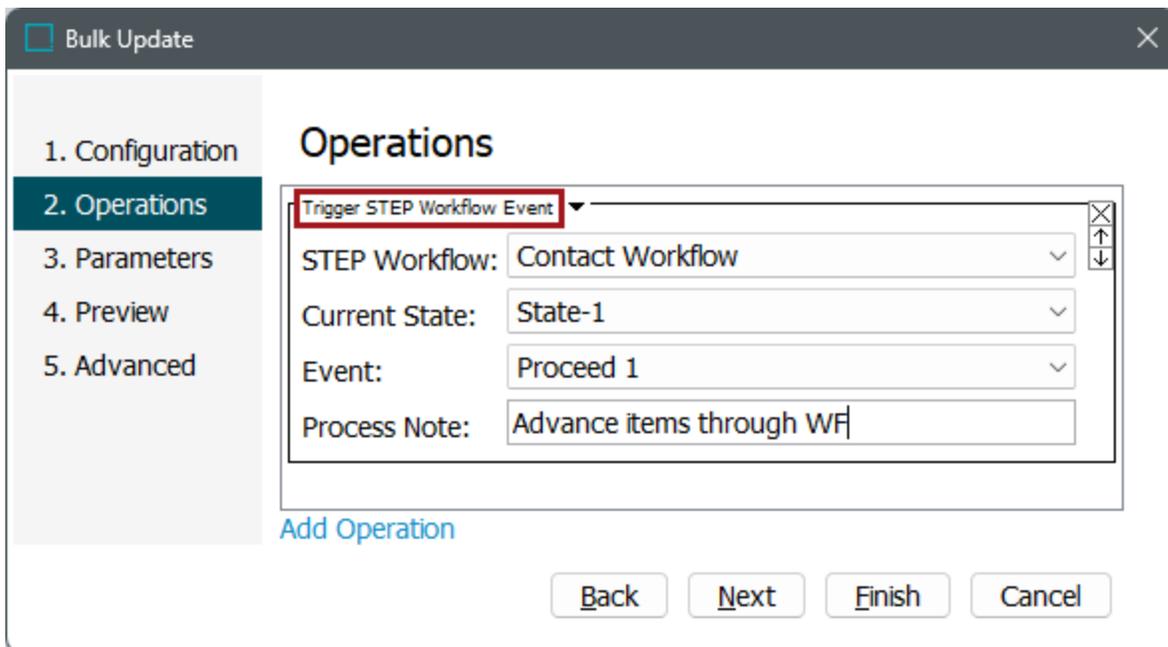
## Prerequisites

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, click Workflow and select **Trigger STEP Workflow Event**.



**Bulk Update**

1. Configuration

**2. Operations**

3. Parameters

4. Preview

5. Advanced

### Operations

Trigger STEP Workflow Event

STEP Workflow: Contact Workflow

Current State: State-1

Event: Proceed 1

Process Note: Advance items through WF

[Add Operation](#)

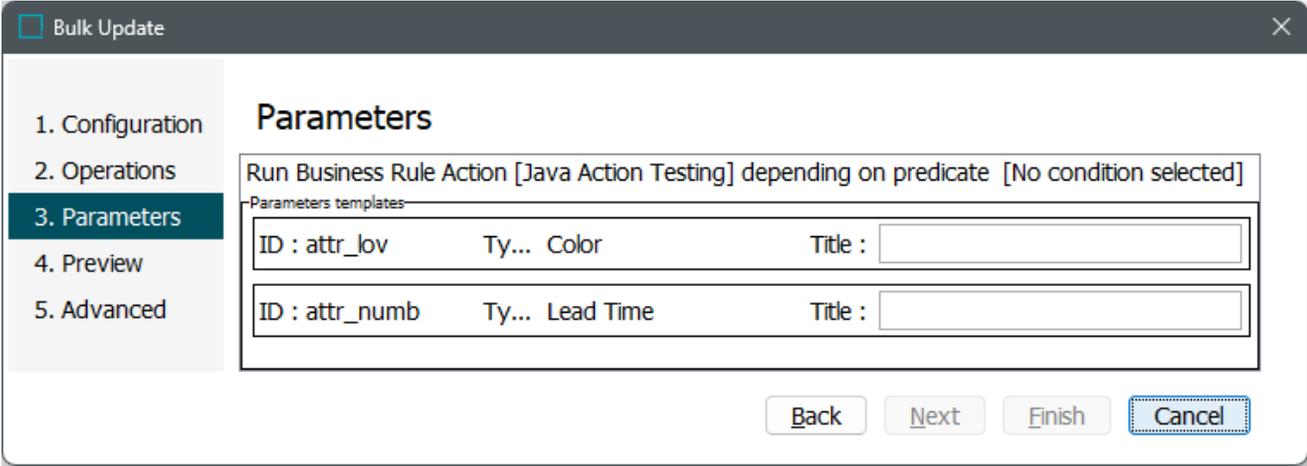
Back Next Finish Cancel

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.



**Parameters**

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

Parameters templates

ID : attr_lov	Ty... Color	Title :	<input type="text"/>
ID : attr_num	Ty... Lead Time	Title :	<input type="text"/>

Back Next Finish Cancel

1. For the 'Run Business Rule' operation, 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 sample results of the configured operations.

**Note:** Depending on business rule configuration, the Preview step can execute irreversible actions such as email notifications or REST calls. By default, the preview is skipped to avoid these types of actions. However, this preview can be useful when configuring operations that are not associated with irreversible actions.

A maximum of 10 objects is 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
✕

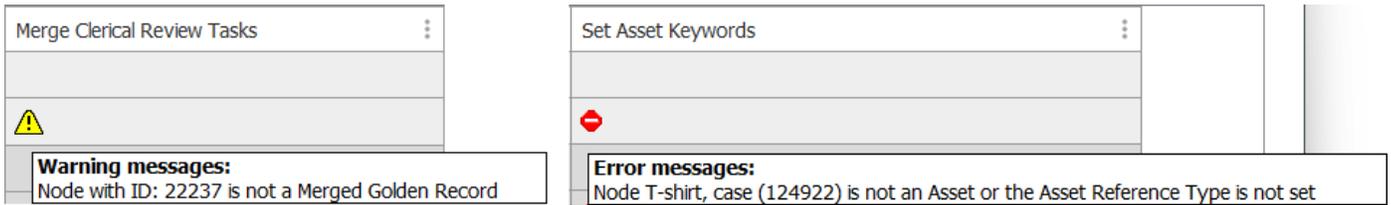
- 1. Configuration
- 2. Operations
- 3. Parameters
- 4. Preview
- 5. Advanced

### Preview

	Object		Add Attribute Link [Website]
⋮	T-shirt, case (124922)	Old	0 link(s) to attribute Website
⋮		New	1 link(s) to attribute Website
⋮	T-shirt, case (124923)	Old	0 link(s) to attribute Website
⋮		New	1 link(s) to attribute Website
⋮	T-shirt, case (124924)	Old	0 link(s) to attribute Website
⋮		New	1 link(s) to attribute Website
⋮	T-shirt, case (124925)	Old	0 link(s) to attribute Website
⋮		New	1 link(s) to attribute Website

Back Next Finish Cancel

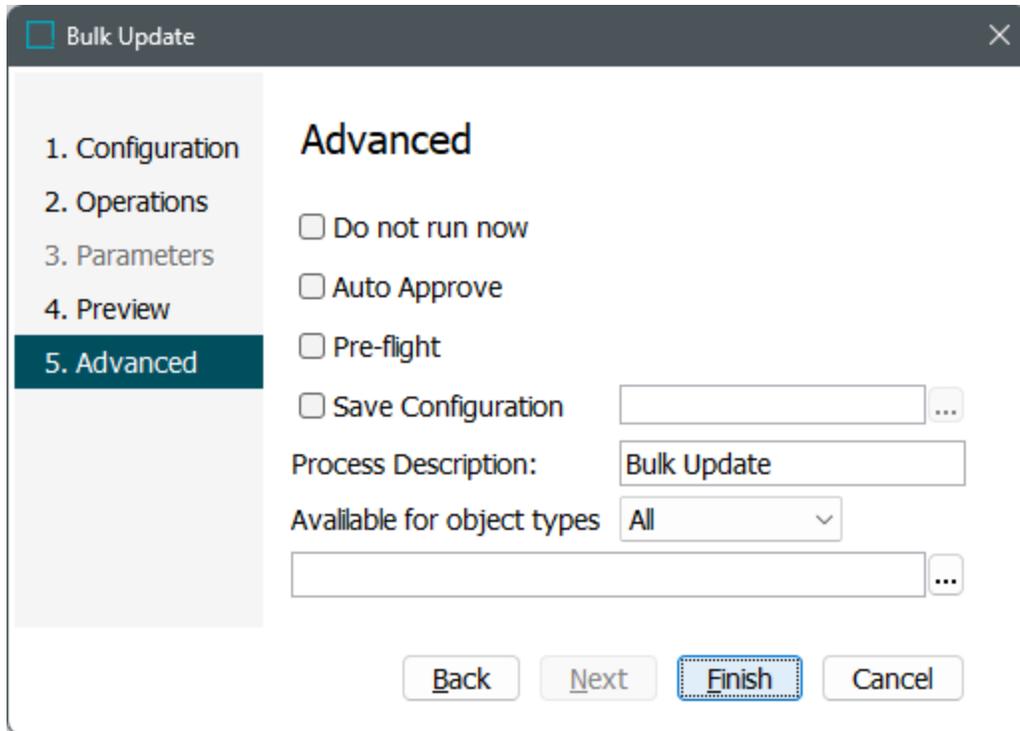
1. Hover over a warning or error icon to review potential problems with the bulk update.



2. Click the **Back** button to resolve warnings and errors by modifying an operation or parameter.
3. Click the **Next** button to display the 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** partially approves updates made by the bulk update and displays them in the approved workspace when the update succeeds.



**Note:** Auto Approve is not supported when the Run Business Rule Operation is used for the bulk update.

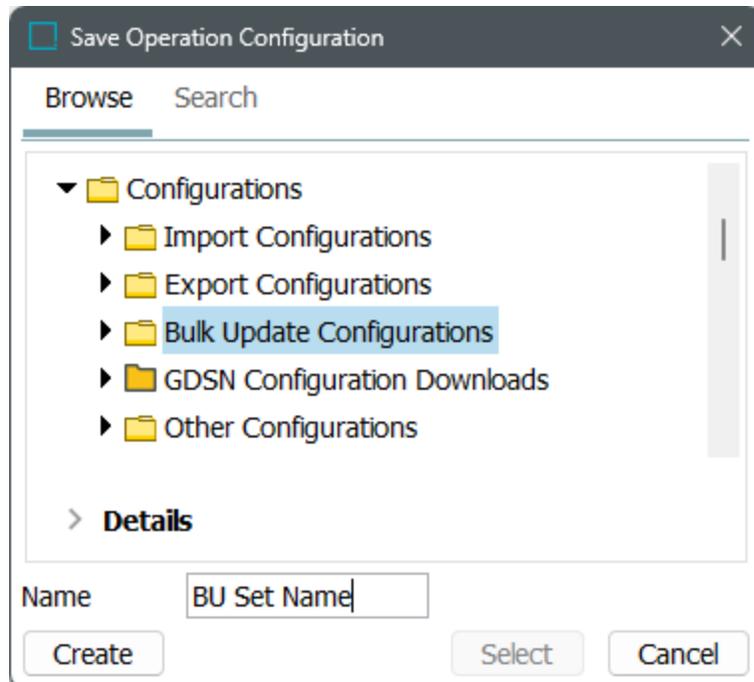
For example, if the bulk update runs on a product attribute and the value is updated, but other changes have been made to the product outside of the bulk update, partial approval is applied only to the bulk-updated value, not to the entire product. However, if the only change(s) on the product are made by the bulk update, the bulk update auto approve changes result 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 another for the object that generated errors. The availability of this option depends on the user's system setup.



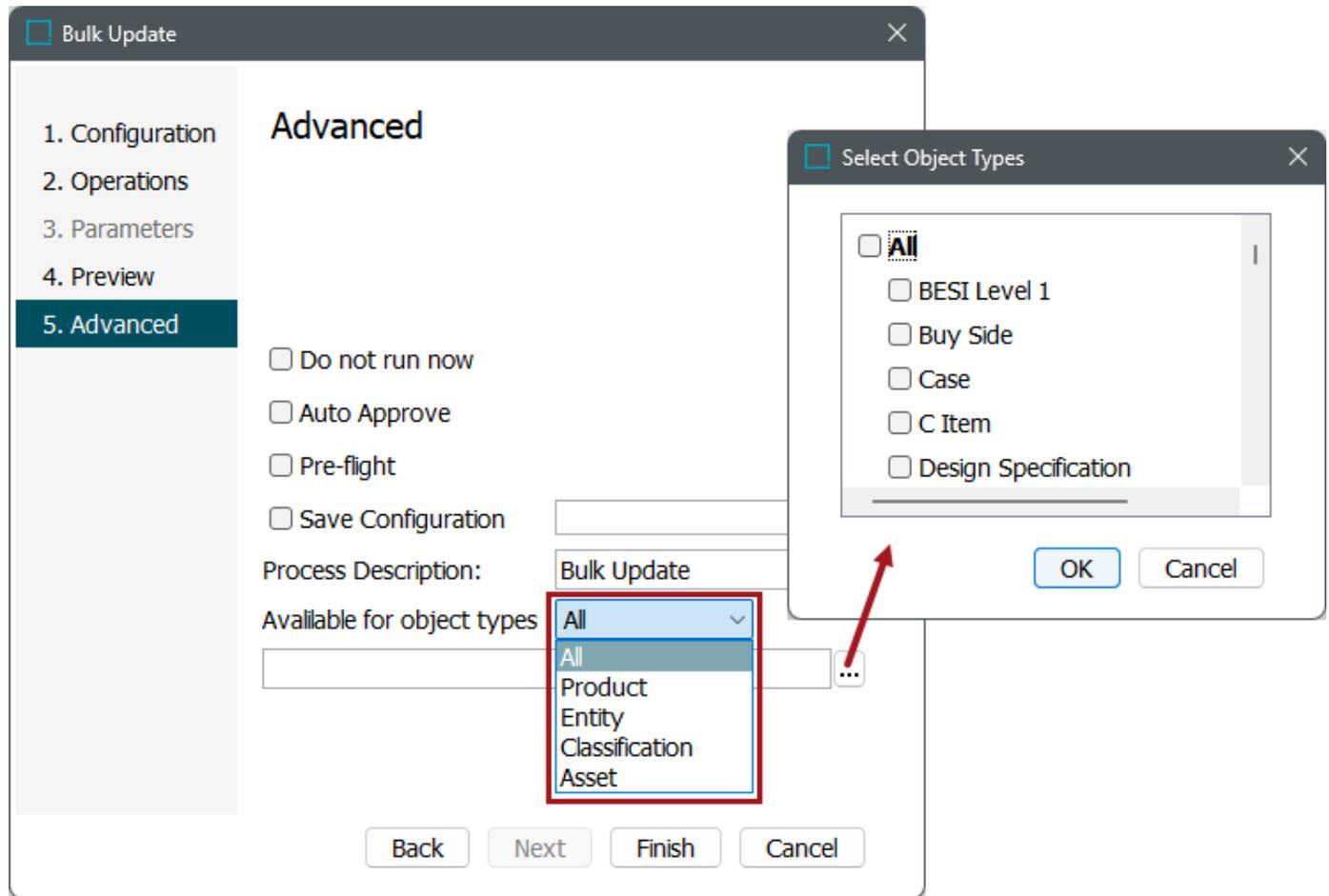
**Important:** Since there is no 'undo' functionality for bulk updates. It is recommended to run a Pre-flight and/or to apply operations to a small set of objects before updating a large number of objects.

- **Save configuration** allows you to save a configuration to 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. Select an object type from the dropdown and then click the ellipsis button (...) to select the nodes to update.

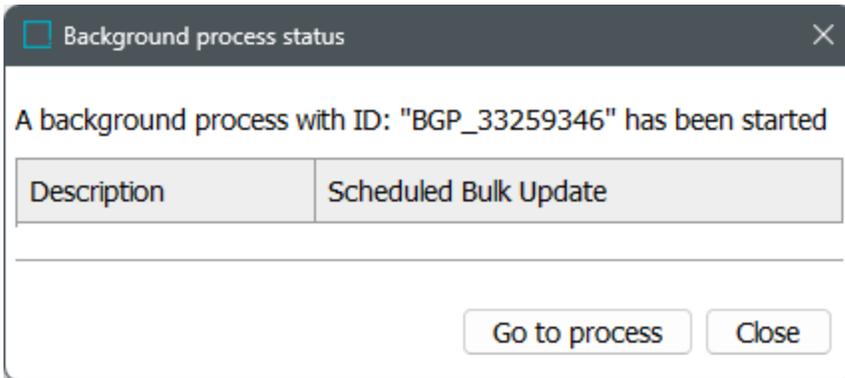


- Click **Finish** to complete the bulk update configuration and start the operation(s) in a background process.

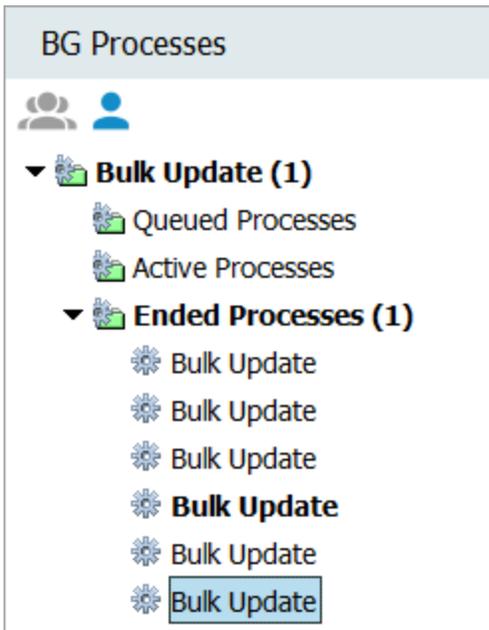
Monitor the bulk update as defined in the Monitoring Bulk Updates topic.

## 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 BGP States and Quarantine Status topic in the System Setup documentation.

## Bulk Update (Pre-flight)

Background Process Queue Info

### Properties

Property	Value
Started by	USERJ
Id	BGP_257815
Description	Bulk Update (Pre-flight)
Execution Server	doc-rel
Progress	Done
Status	succeeded
Created	Mon Oct 20 15:04:15 EDT 2025
Started	Mon Oct 20 15:04:20 EDT 2025
Finished	Mon Oct 20 15:04:20 EDT 2025
Processing Time	0 m 0 s
Time in Queue	0 m 5 s
# of warnings	0
# of errors	7

### Execution Report

```

1 Bulk update background process started (Mon Oct 20 15:04:20 EDT 2025)
2 Context: Context1
3 Workspace: Main
4 Commit Mode: Pre-Flight Check (rollback)
5 Auto Approve: No
6 Collection: BGP\_257815\_tmp\_input
7 Configuration: temporary configuration
8 Read bulk update operation configuration successfully (Mon Oct 20 15:04:20 EDT 2025)
9 Created temporary collection: BGP\_257815\_tmp\_fail (Mon Oct 20 15:04:20 EDT 2025)
10 Applying operations to dataset (Mon Oct 20 15:04:20 EDT 2025)
!11 [Item 2, operation 1]: Error: Object type cannot be changed
!12 [Item 3, operation 1]: Error: Object type cannot be changed
!13 [124628, operation 1]: Error: Object type cannot be changed
!14 [Item 5b, operation 1]: Error: Object type cannot be changed
!15 [Item 6, operation 1]: Error: Object type cannot be changed
!16 [Item 4a, operation 1]: Error: Object type cannot be changed
!17 [Item 7, operation 1]: Error: Object type cannot be changed
18 (rollback) (Mon Oct 20 15:04:20 EDT 2025)
19 Summary (Mon Oct 20 15:04:20 EDT 2025)
20 0 objects OK. 7 objects failed.
21 0 info messages. 0 warning messages. 7 Error messages.
22 Operations Summary (Mon Oct 20 15:04:20 EDT 2025)
23 Operation 1: [Set Object Type]
24 Errors: 7
25 7: Object type cannot be changed
26 End of Summary
    
```

⏪ ⏩ 1-26 of 26 ⏴ ⏵ 1 Save...

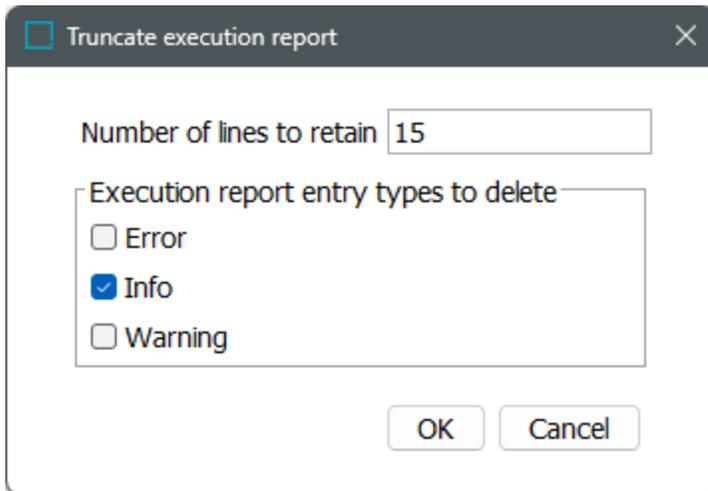
2 Truncate

### Bulk Update Actions

3 Relaunch Wizard 4 Bulk Update OK Objects 5 Save Failed Objects 6 Impact Analysis

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

- Click **Save** to keep a copy of the execution report. This can be saved locally.
- 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.



- 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.
- Click **Bulk Update OK Objects** if a pre-flight process was run, the bulk update will now be run on the objects that were processed without errors.
- 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.
- 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 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** ✕

- ▼ Collections
  - ▶ Addresses
  - ▶ alarms
  - ▶ AllItems
  - ▶ All PPH
  - ▶ auto
  - ▶ Backplate
  - ▶ Baskets
  - ▶ BatteryBackupClocks
  - ▶ Blue
  - ▶ Bottled Water
  - ▶ Bulk Notification Object
    - Primary Product Hierarchy
  - ▶ byName
  - ▶ byNameDK
  - ▶ Collection
  - ▶ Collection2
  - ▶ Collection-ItemColor
  - ▶ CommDataProducts
  - ▶ Copy Writing State
  - ▶ Cotton Shirts with DK Desc
  - ▶ Cotton T-shirts

### Bulk Notification Object

[Collection](#)   [Data Profile](#)   [Log](#)

---

▼ **Description**

	Name			Value
⋮	ID			6000859
⋮	Name			Bulk Notification Object
⋮	Estimated Amount ...			1
⋮	Search URL			step://search?args0.0=IncludeDataContainers%3dno%2csearchStrin
⋮	Last edited By			2025-01-06 10:13:28 by USERJ
⋮	Purpose		ABC	

▼ **Statistics**

**Collection Content**

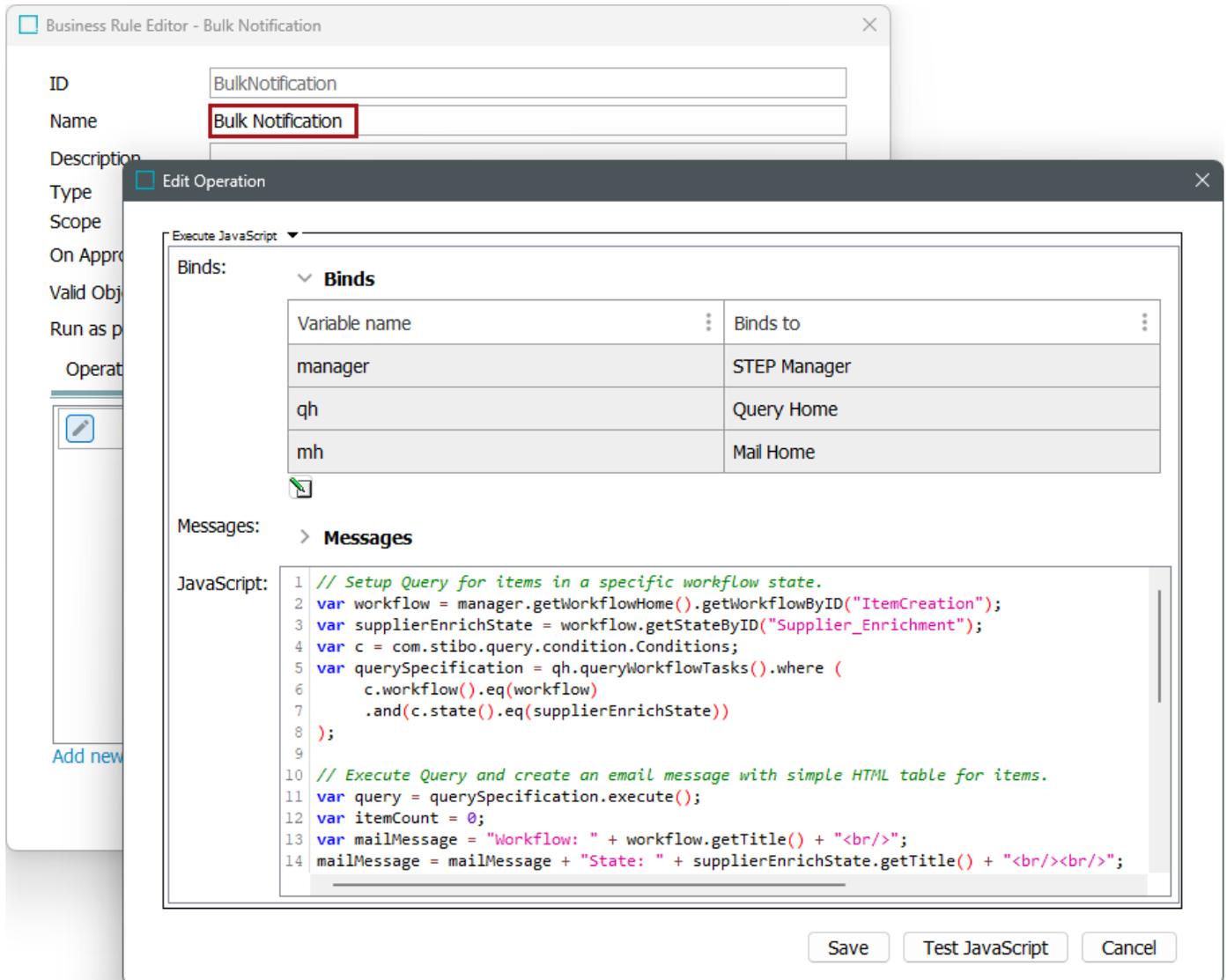
1 object(s)  
Notice: Objects in Collection may be hidden in Tree due to Context/Workspace visibility and/or privilege checks

**Content by Object Type**

**Product (1)**

- Primary Product Classification (1)

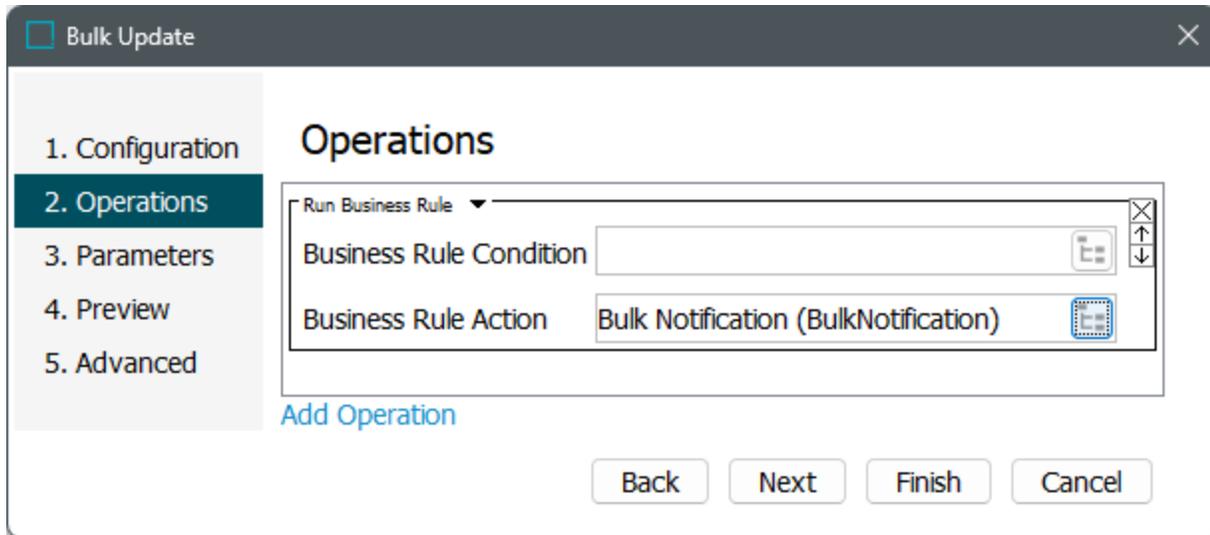
2. Create a business action that checks the relevant workflow(s) and their state(s) for tasks. Configure the business action so that if the desired object types are in the designated workflow state(s), then an email will be created and sent to the designated user. In this example, the business action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



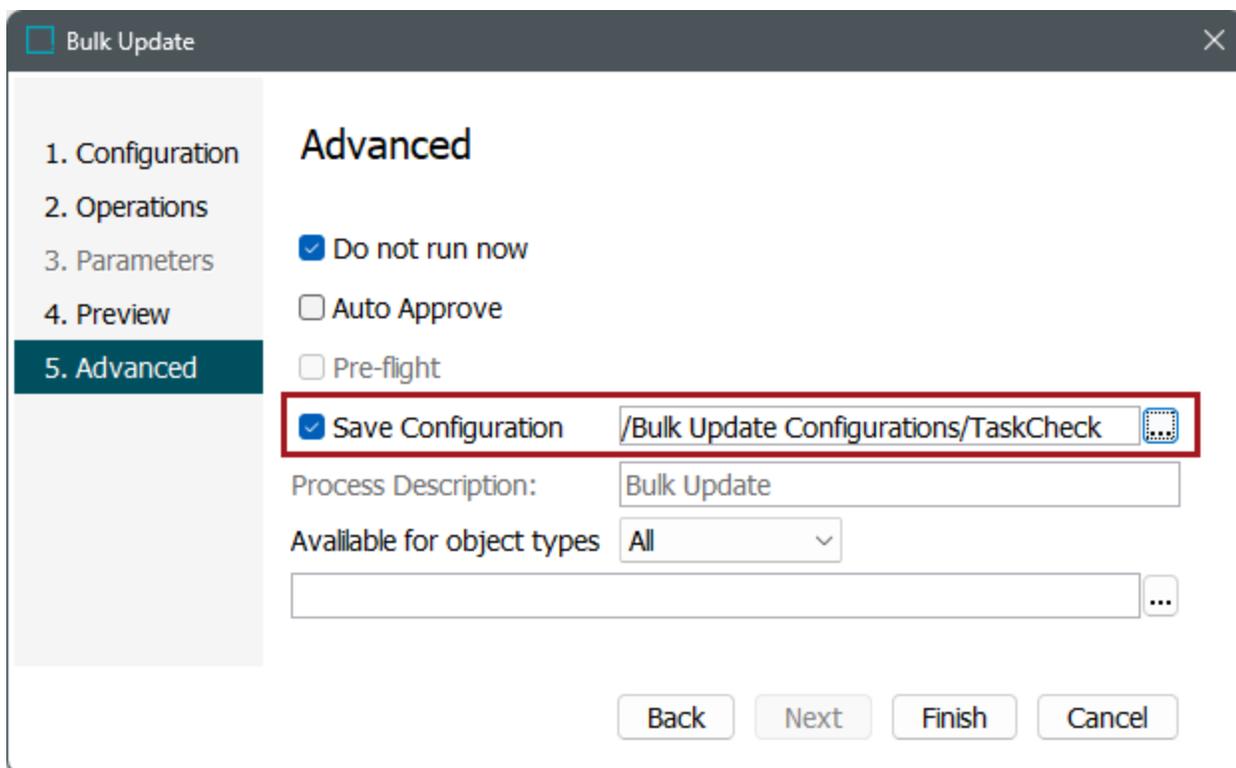
To create this business action, under 'Binds,' create variable names to bind to STEP Manager, Query Home, and Mail Home (in the Other category). In the example, the following binds were created:

For a full JavaScript code example, refer to the online version of this topic.

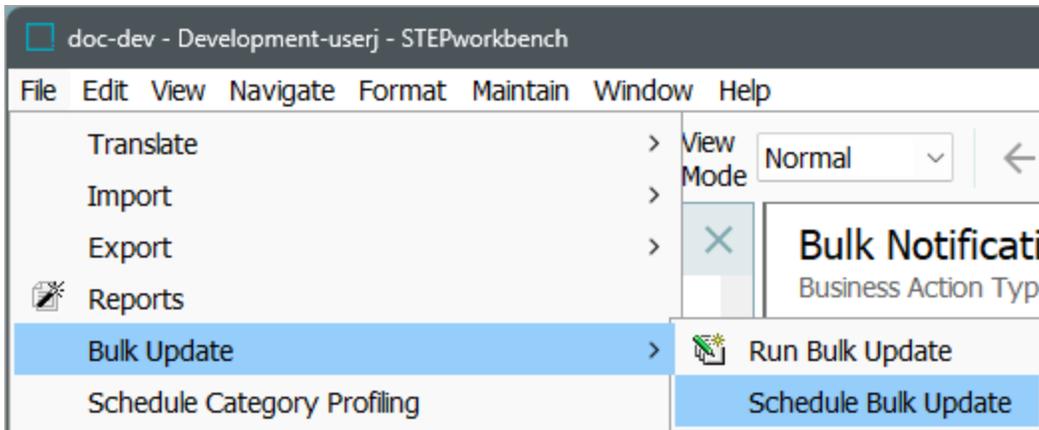
3. Create a bulk update configuration that runs the business action just created, as shown in the screenshot below. Schedule the bulk update to run with the collection that was defined using the business action.



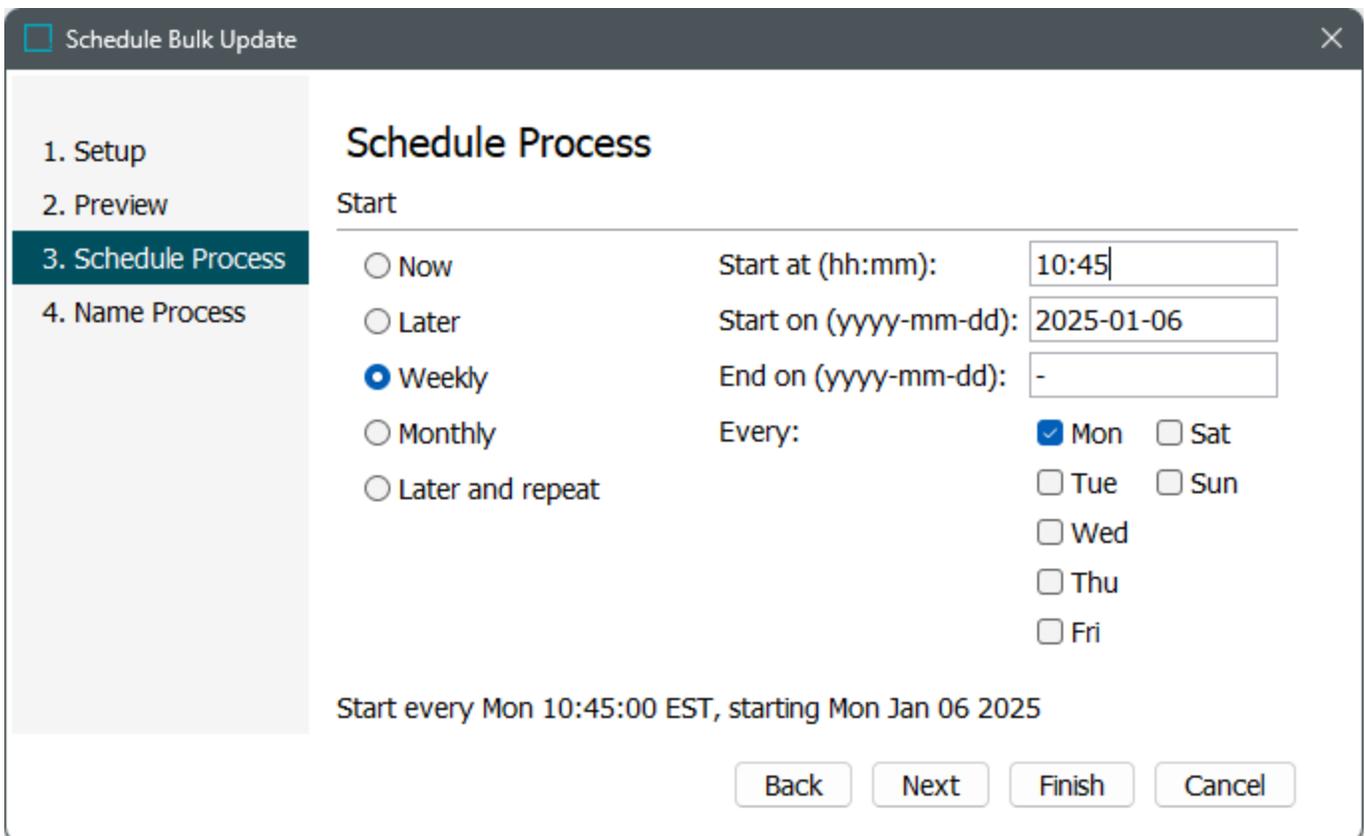
4. Save the Bulk Update configuration.



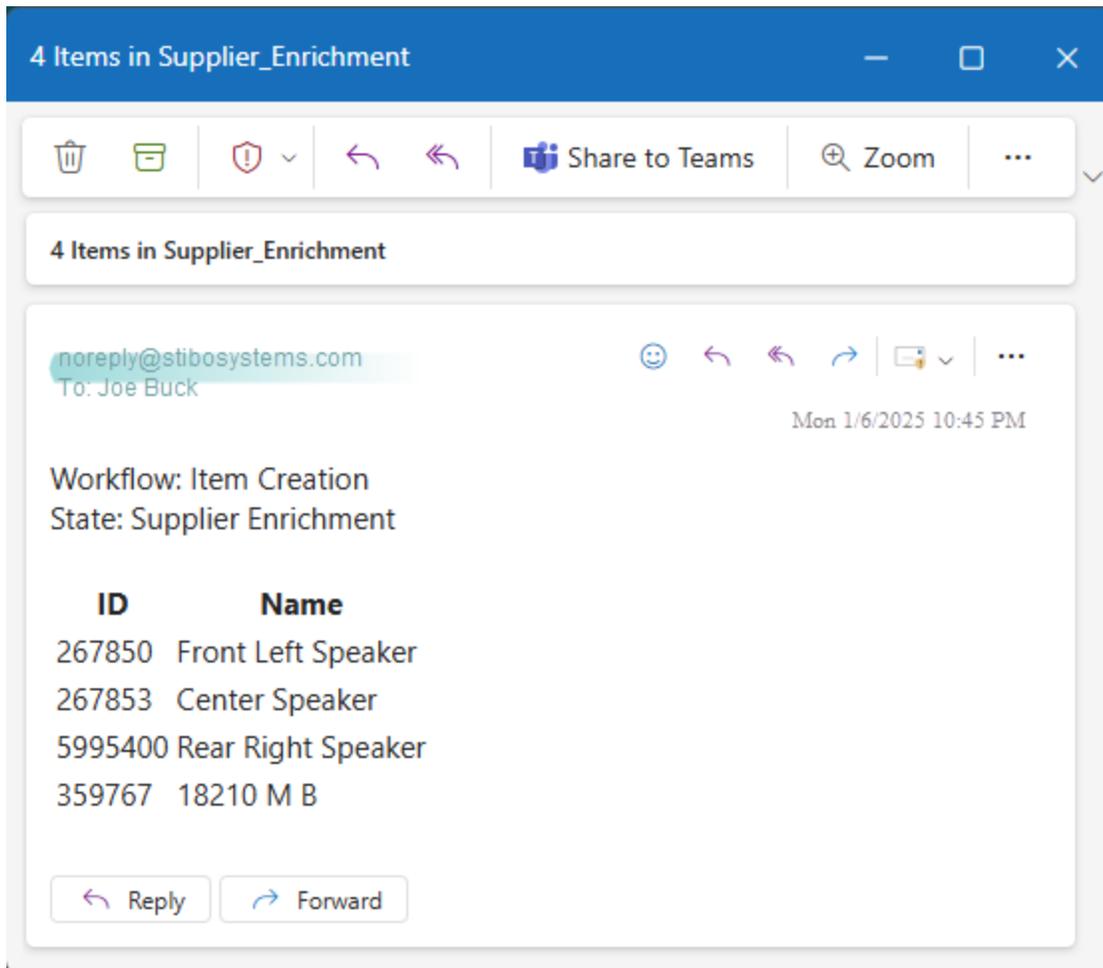
5. Navigate to and select the saved collection created earlier with only one object in it. From the File menu, select Bulk Update and Schedule Bulk Update.



6. Select the bulk update configuration just created and proceed through the wizard to set the schedule. Since there is only one object in the collection configured on the bulk update, the business action will only run one single time.



7. 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).



## 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 from a specific supplier include a measurement with 'millimeters' spelled out, but the STEP requires 'mm', a scheduled bulk update that makes the change periodically can be an effective data management tool.

**Important:** Consider the time zone of the application server compared to 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. Once the process is scheduled, the **Schedule** field shows the server time zone regardless of the time zone of the user who scheduled the process. The **Next Run** field shows the local time zone.

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

### Prerequisites

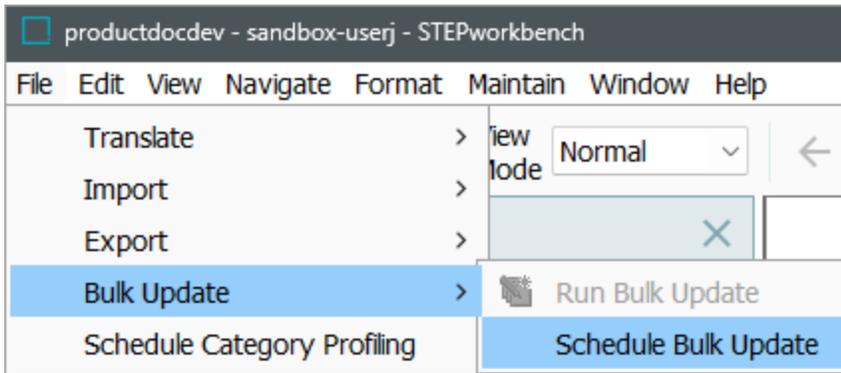
Complete the following tasks before scheduling a collection to run a bulk update.

1. Create a collection. For more on creating a collection, refer to 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

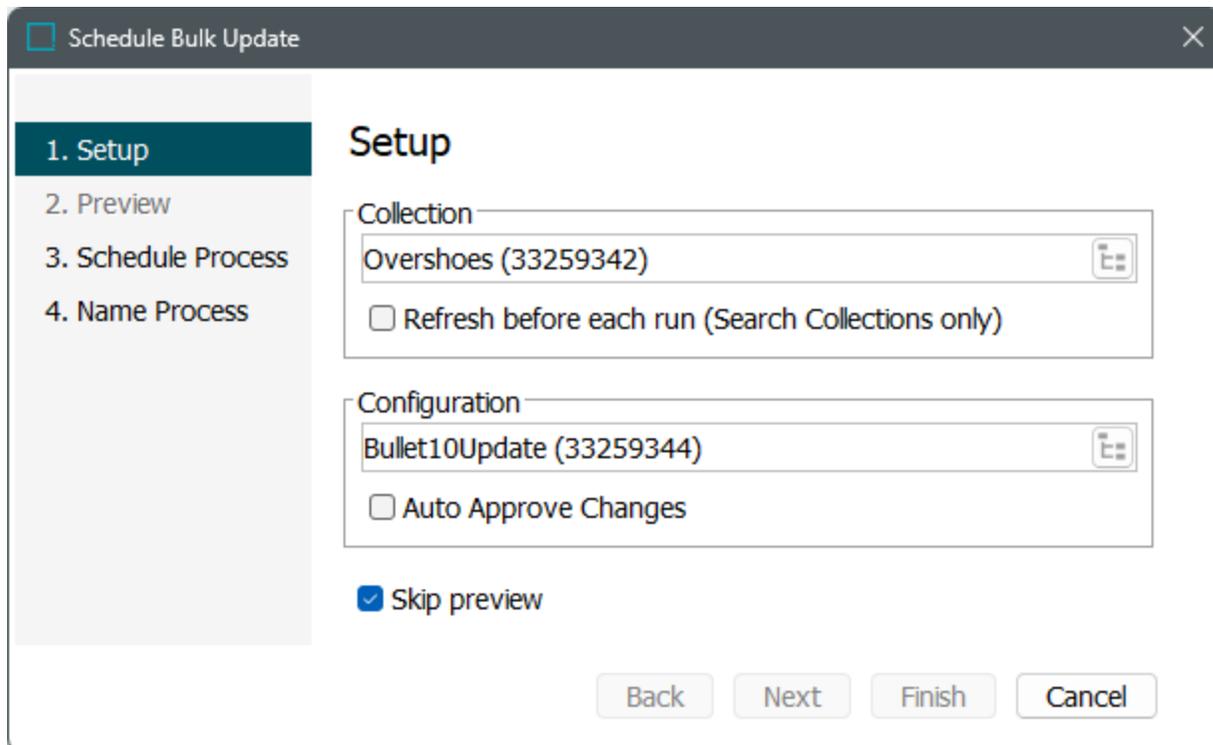
To perform a bulk update on a collection at regular intervals, create a schedule that applies to the collection. The bulk update is then automatically run at the scheduled time.

1. From the File menu, select Bulk Updates and **Schedule Bulk Update**.



2. On the Schedule Bulk Update wizard, for the **Collection** parameter, click the selector button  to locate and select the relevant collection. This option is not valid if the collection is created from the Run Bulk Update option.

- For the **Refresh before each run (Search Collections only)** parameter, if the selected collection was created using the search criteria, check this option to 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 selector button  to locate and select the relevant configuration.
  - For the **Auto approve changes** parameter, check this option to place the updated objects in the approved workspace immediately after the update.
4. Set the **Skip Preview** parameter as required. Depending on the operations in the bulk update configuration, the Preview step can execute irreversible actions such as email notifications or REST calls.
  - Check to skip the preview step, which is the default.
  - Uncheck to display the preview results and run associated business rules.
5. Click **Next** to display the optional Preview step (based on the Skip Preview parameter selection in the Configuration step).

If the Preview is available, review the example results of the update.

**Schedule Bulk Update**

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

### Preview (first 10 objects)

Object	Old	New
Plastic Shoe Cover		Men's sizes available in either white or black PVC.
Yellow Slush Boots		Men's sizes available in either white or black PVC.
Size #9 Men Yellow Rubber Slush Boots		Men's sizes available in either white or black PVC.

Buttons: Back, **Next**, Finish, Cancel

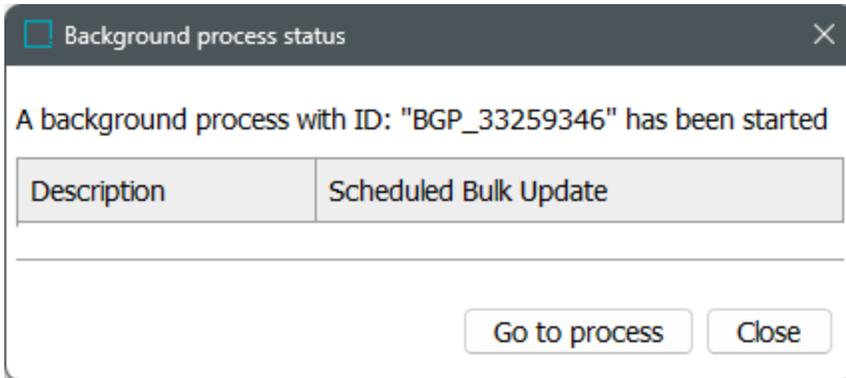
6. Click **Next** to display the Schedule Process step and create the time schedule by selecting either **Now**, **Later**, **Weekly**, **Monthly**, or **Later and repeat**. Complete the options related to the schedule.

The screenshot shows the 'Schedule Bulk Update' dialog box with the 'Schedule Process' step selected. The left sidebar contains four steps: 1. Setup, 2. Preview, 3. Schedule Process (highlighted), and 4. Name Process. The main area is titled 'Schedule Process' and has a 'Start' section. It includes radio buttons for 'Now', 'Later', 'Weekly' (selected), 'Monthly', and 'Later and repeat'. To the right, there are input fields for 'Start at (hh:mm):' (05:00), 'Start on (yyyy-mm-dd):' (2025-02-25), and 'End on (yyyy-mm-dd):' (-). Below these are 'Every:' checkboxes for days of the week: Mon, Tue (checked), Wed, Thu, Fri, Sat, and Sun. At the bottom, a summary text reads 'Start every Tue 05:00:00 EST, starting Tue Feb 25 2025'. At the very bottom are four buttons: 'Back', 'Next', 'Finish', and 'Cancel'.

7. 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.

The screenshot shows the 'Schedule Bulk Update' dialog box with the 'Name Process' step selected. The left sidebar now highlights step 4, 'Name Process'. The main area is titled 'Name Process' and contains two input fields: 'Schedule Process Name:' with the value 'Scheduled Bulk Update' and 'Process Name:' with the value 'Bulk Update'. At the bottom are four buttons: 'Back', 'Next', 'Finish' (highlighted), and 'Cancel'.

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



The following information is available on the BG Processes tab:

**BG Processes**

- ▶ RuleSetExporter
- ▶ RuleSetImporter
- ▶ Run Business Action Search
- ▶ Run Business Action Search All
- ▶ STEP Workflow Profiling
- ▶ **Scheduled Empty Recycle Bin (1)**
- ▼ Scheduled Processes
  - ◻ Queued Processes
    - ⚙ Weekly Scheduled Recycle Bin Purg
    - ⚙ **Scheduled Bulk Update**
  - ▶ Active Processes
  - ▶ Ended Processes
- ▶ Seal Change-Package
- ▶ Smartsheet Export
- ▶ Smartsheet Import
- ▶ StateflowDeadline
- ▶ Subscription import
- ▶ SuspendBGPs
- ▶ Translation
- ▶ Translation Import

**Scheduled Bulk Update**

Background Process

▼ **Properties**

Property	Value
Started by	User J (USERJ)
Id	BGP_257908
Description	Scheduled Bulk Update
Schedule	Every 1440 Minutes, Starting Tue Oct 21 20:00:00 EST 2025
Execution Server	doc-rel
Status	waiting
Created	Tue Oct 21 09:38:16 EDT 2025
Started	Tue Oct 21 09:38:20 EDT 2025
# of warnings	0
# of errors	0
Next Run	Tue Oct 21 20:00:00 EDT 2025

▼ **Execution Report**

- On the left side, under the Scheduled Processes node, a bulk update that is scheduled to run later is displayed under the 'Queued processes' node.
- On the right side, in the Properties section, the schedule is displayed, and the process shows a Status of 'waiting.'
- On the BG Processes tab, the Properties section includes the 'Started by' parameter which reflects the user who created the scheduled background process. To change the user for a scheduled or queued BGP, add the 'Manage Background Process Execution' Setup Action privilege to the relevant user group. This privilege enables a selector button on the 'Started by' parameter.

The screenshot displays the 'BG Processes' interface. On the left, a tree view shows 'Scheduled Processes' expanded to 'Queued Processes', where 'Scheduled Bulk Update' is highlighted. The main panel shows the details for this process:

**Scheduled Bulk Update**  
Background Process

**Properties**

Property	Value
Started by	User J (USERJ)
Id	BGP_257908
Description	Scheduled Bulk Update
Schedule	Every 1440 Minutes, Starting Tue Oct 21 20:00:00 EST 2025
Execution Server	doc-rel
Status	waiting
Created	Tue Oct 21 09:38:16 EDT 2025
Started	Tue Oct 21 09:38:20 EDT 2025
# of warnings	0
# of errors	0
Next Run	Tue Oct 21 20:00:00 EDT 2025

**Execution Report**

1 Collection: [Baskets](#)  
2 Configuration: [BasketsConfig](#)

Navigation: 1-2 of 2, Save..., Truncate

**Bulk Update Actions**

Edit Schedule

- The Execution Report records the progress of the background process.
- The Bulk Update Actions section allows users to make an adjustment to the scheduled bulk update.

Click the 'Edit Schedule' button to 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 next bulk update run.

For details on the states of a background process, refer to the BGP States and Quarantine Status topic in the System Setup documentation.

## Scheduling a Collection Refresh in Web UI

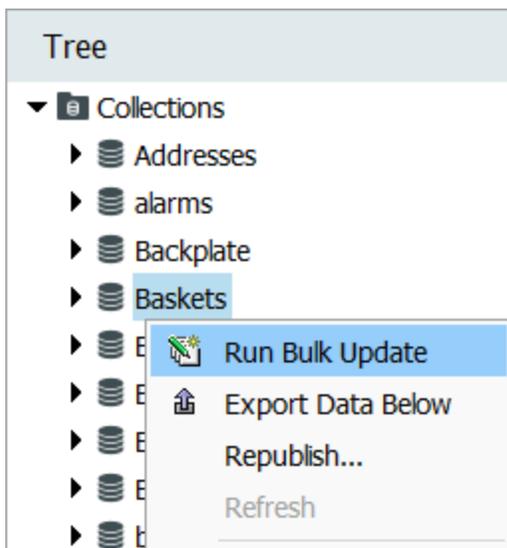
Collections are often used as filters on status selectors, though to refresh a collection in the Web UI you must go to the collection directly to refresh it in Web UI without going to the collection directly. This can be accomplished by going to the collection content screen directly or via a scheduled 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 Web User Interfaces documentation.

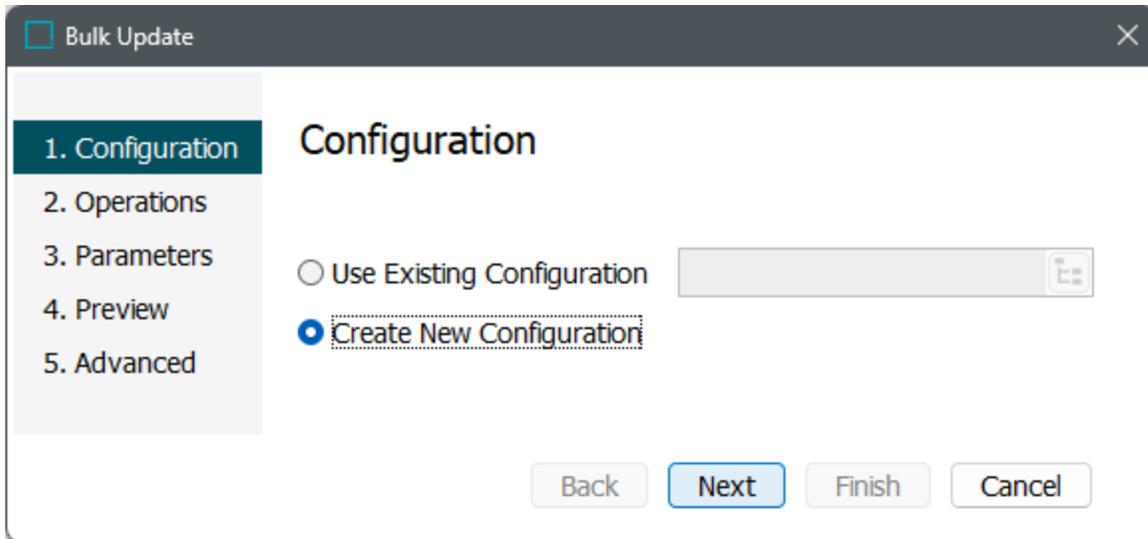
**Important:** Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although displayed, the time zone of the client is not included in the instructions 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. In the workbench, right-click the desired collection and click **Run Bulk Update**.



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



**Bulk Update** [Close]

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

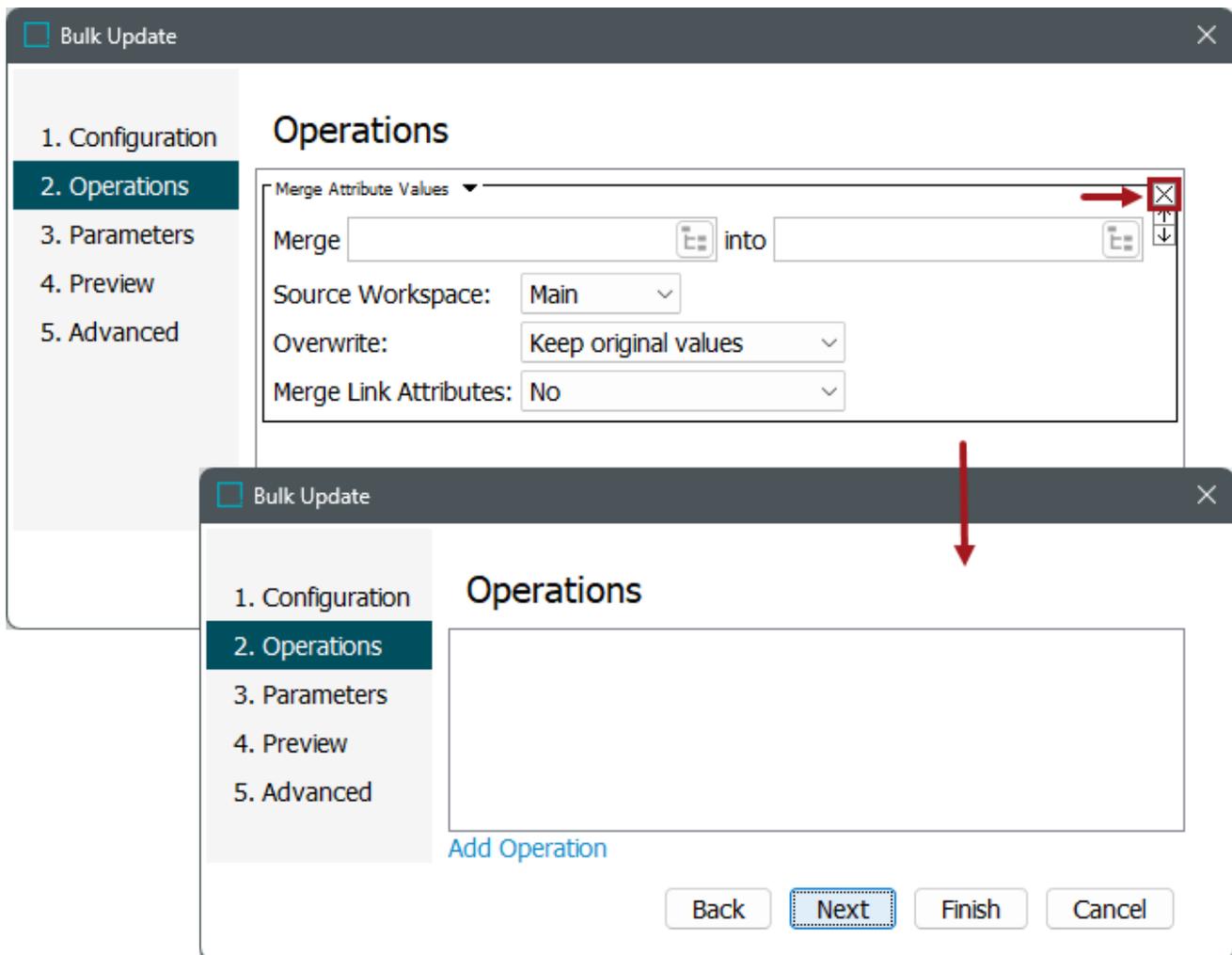
### Configuration

Use Existing Configuration [Text Field]

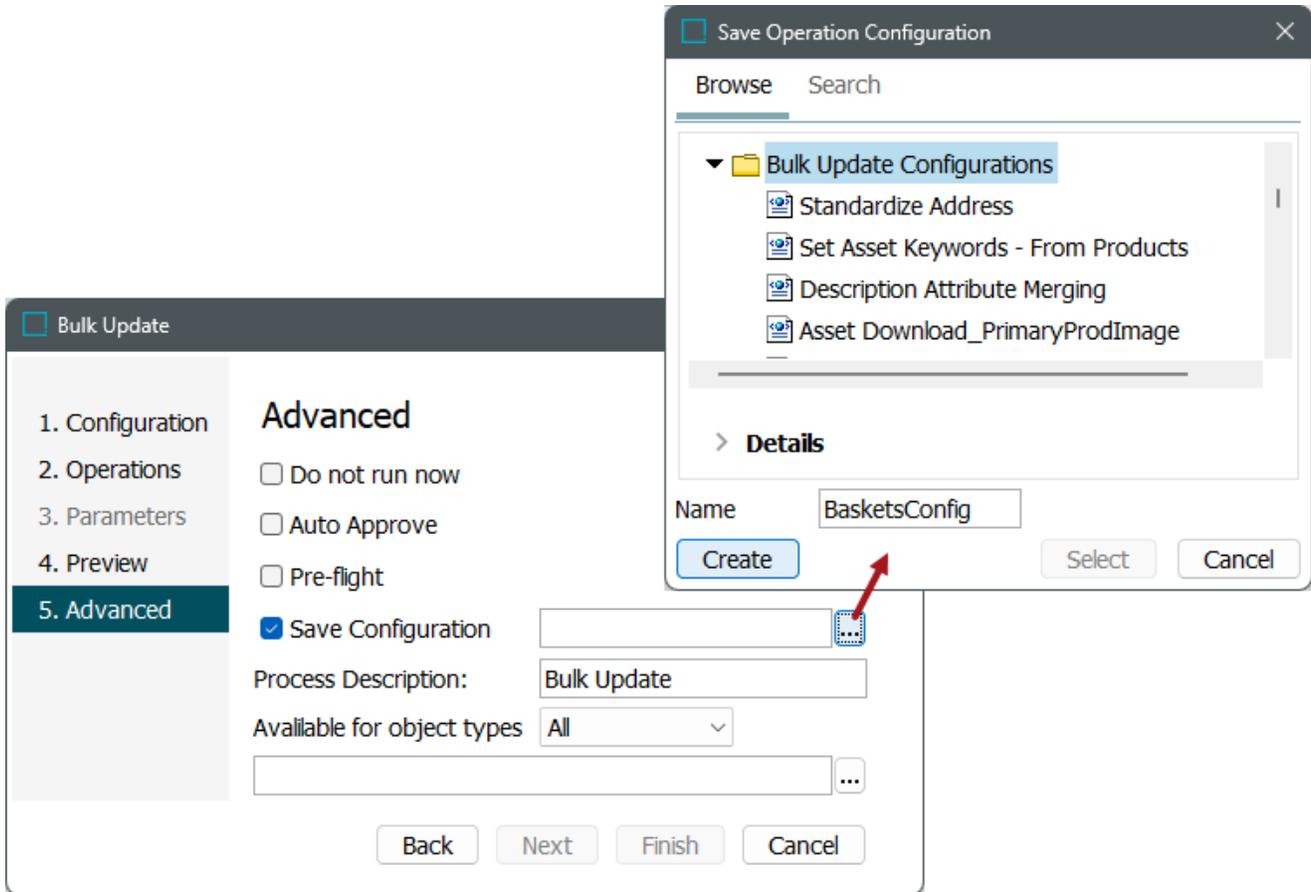
Create New Configuration

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

3. In the Operations step, remove the default operation and proceed with no operations selected and click **Next**.

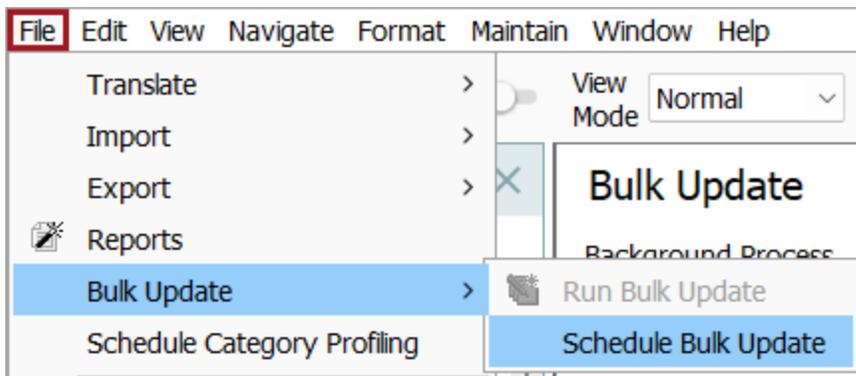


4. Click **Next** to display the Advanced step, check the **Save Configuration** option, click the ellipsis button (...) to select a location and name for the configuration.

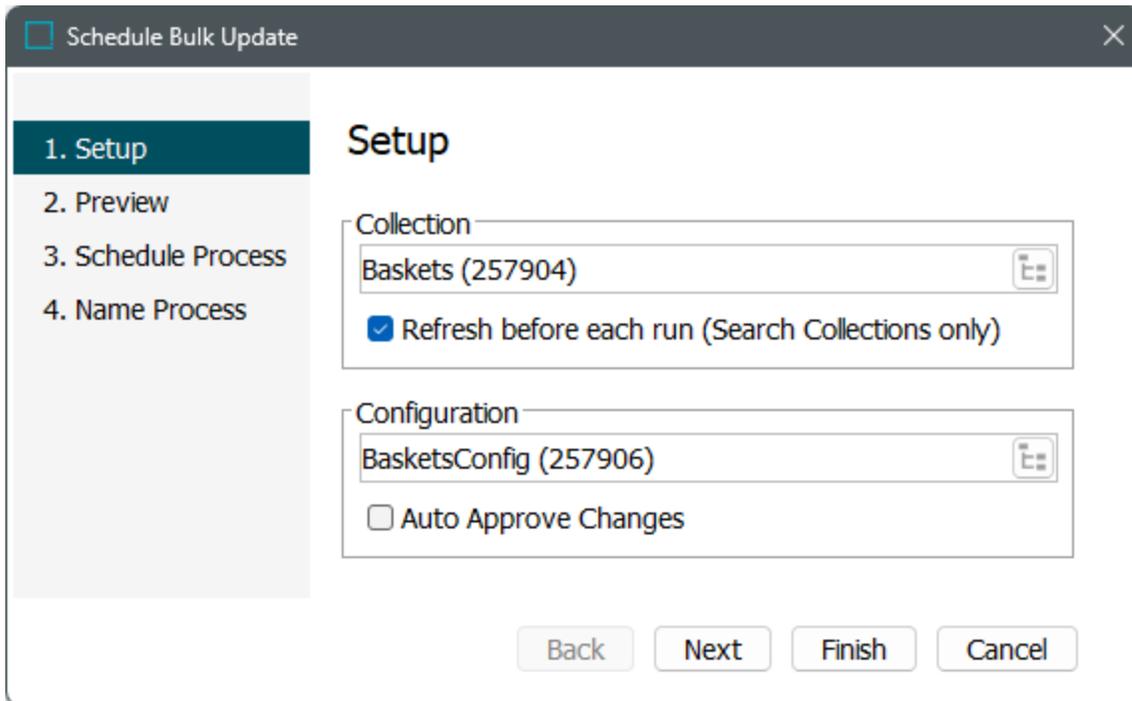


Once complete, this will trigger

5. Click **Finish**. The background process runs but does not make any changes. View the background process or close the dialog.
6. On the File menu, select Bulk Update and **Schedule Bulk Update**.



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



**Schedule Bulk Update**

**1. Setup**

2. Preview

3. Schedule Process

4. Name Process

**Setup**

Collection  
Baskets (257904)

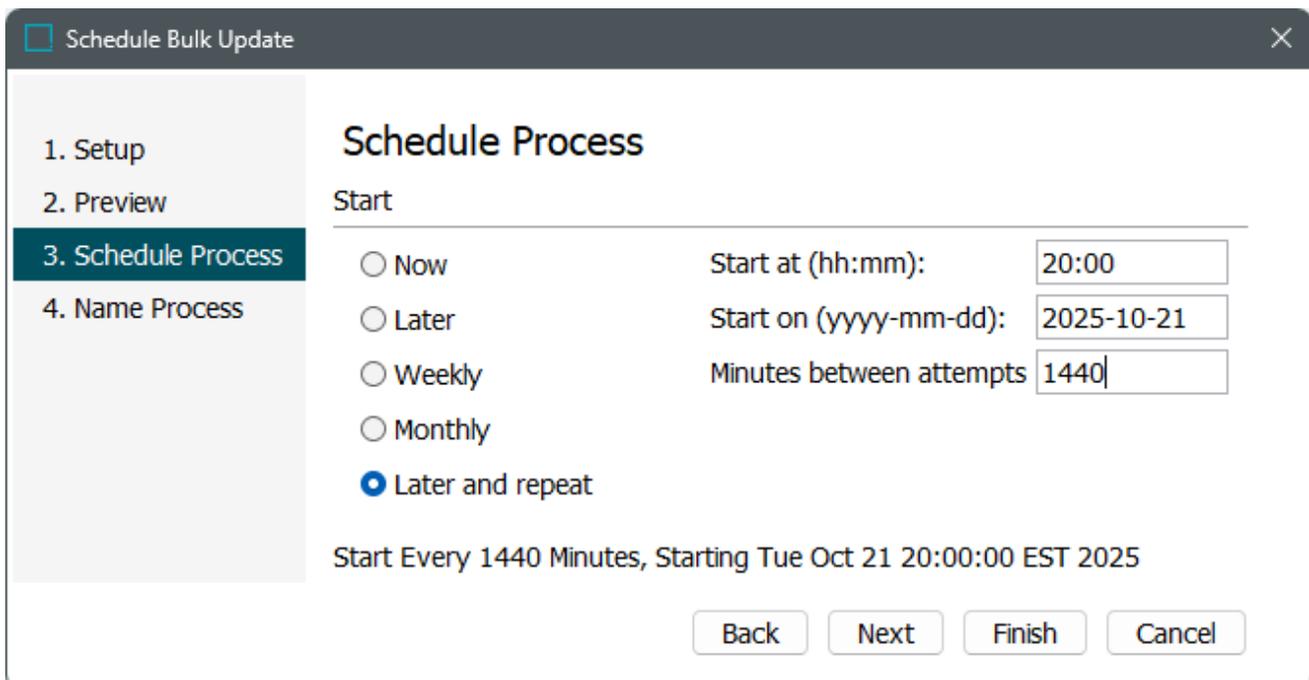
Refresh before each run (Search Collections only)

Configuration  
BasketsConfig (257906)

Auto Approve Changes

Back Next Finish Cancel

- Click **Next** until the Schedule Process step displays. Select the **Later and repeat** option and specify the interval at which the update should be run.



**Schedule Bulk Update**

1. Setup

2. Preview

**3. Schedule Process**

4. Name Process

**Schedule Process**

Start

Now      Start at (hh:mm): 20:00  
 Later      Start on (yyyy-mm-dd): 2025-10-21  
 Weekly      Minutes between attempts 1440  
 Monthly  
 **Later and repeat**

Start Every 1440 Minutes, Starting Tue Oct 21 20:00:00 EST 2025

Back Next Finish Cancel

9. Click **Next** and then click **Finish** to complete the scheduling wizard.

## Editing a Scheduled Bulk Update

To change the schedule for the Bulk Update:

1. On the BGProcesses tab, select the scheduled bulk update.
2. In the Bulk Update Actions section, click the 'Edit Schedule' button to reopen the 'Schedule Bulk Update' wizard on the 'Schedule Process' step. Modify the schedule as needed. The changes will be applied to the next scheduled run.

**BG Processes**

- ▶ Revive Recursively
- ▶ RuleSetExporter
- ▶ RuleSetImporter
- ▶ Run Business Action Search
- ▶ Run Business Action Search All
- ▶ STEP Workflow Profiling
- ▶ **Scheduled Empty Recycle Bin (1)**
- ▼ Scheduled Processes
  - ▼ Queued Processes
    - ⚙ Weekly Scheduled Recycle Bin Purg
    - ⚙ **Scheduled Bulk Update**
  - ▶ Active Processes
  - ▶ Ended Processes
- ▶ Seal Change-Package
- ▶ Smartsheet Export
- ▶ Smartsheet Import
- ▶ StateflowDeadline
- ▶ Subscription import
- ▶ SuspendBGPs
- ▶ Translation
- ▶ Translation Import
- ▶ Unique Key Processes
- ▶ Unlink Object Type
- ▶ Update actual page from plan
- ▶ UploadDTPDocument
- ▶ Web UI Asset Pipeline Download
- ▶ Web UI Download

### Scheduled Bulk Update

Background Process

▼ **Properties**

Property	Value
Started by	User J (USERJ)
Id	BGP_257908
Description	Scheduled Bulk Update
Schedule	Every 1440 Minutes, Starting Tue Oct 21 20:00:00 EST 2025
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# of warnings	0
# of errors	0
Next Run	Tue Oct 21 20:00:00 EDT 2025

▼ **Execution Report**

- 1 Collection: [Baskets](#)
- 2 Configuration: [BasketsConfig](#)

⏪ ⏴ 1-2 of 2 ⏵ ⏩ Save... Truncate

▼ **Bulk Update Actions**

Edit Schedule