

BULK UPDATES USER GUIDE

The logo for StiboSystems, featuring the company name in a white sans-serif font with a small crown-like icon above the 'i' in 'Stibo'. It is positioned on a large orange triangle that points to the right.

StiboSystems

STEP Trailblazer 8.2

Table of Contents

- Table of Contents 2
- Bulk Updates 4
- Running Bulk Updates 5
 - Objects that it can be run on in Tree are: 6
 - Objects that it can be run on in System Setup are: 7
- Bulk Update Wizard 8
 - Step 1 - Configuration 8
 - Step 2 - Operations 9
 - Step 3 - Preview 10
 - Step 4 - Advanced 11
- Bulk Update Operations 14
 - Attribute Values Operations for Bulk Updates 15
 - Merge Attribute Values 15
 - Set Value 18
 - Data Containers Operations for Bulk Updates 20
 - Update Data Containers 20
 - Data Quality Operations for Bulk Updates 20
 - Generate Match Codes 20
 - Match Duplicates (apply matching algorithm) 21
 - Standardize Address 21
 - Publishing Operations for Bulk Updates 24
 - Start flatplans in STEP Workflow 26
 - Remove flatplans from STEP Workflow 26
 - Check publication document for needs update 27
 - Update publication document 27
 - References and Links Operations for Bulk Updates 28

Add Attribute Link	28
Add Reference or Add Reference By	29
Automatic Classification	31
Industry Classification Synchronization	32
Link Asset to Classification	32
Remove Attribute Link	33
Remove Reference	35
Set Product to Classification Link Type	37
Unlink Asset from Classification	38
Workflow Operations for Bulk Updates	40
Claim	40
Initiate items in STEP Workflows	40
Remove items from STEP Workflow	41
Trigger STEP Workflow Event	41
Run Business Rule Operation for Bulk Updates	41
Send Republish Event Operation for Bulk Updates	42
Set Name Operation for Bulk Updates	44
Set Object Type Operation for Bulk Updates	46
Monitoring Bulk Updates	47
Scheduling Bulk Updates for Collections	50
Scheduling Bulk Updates	50

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.

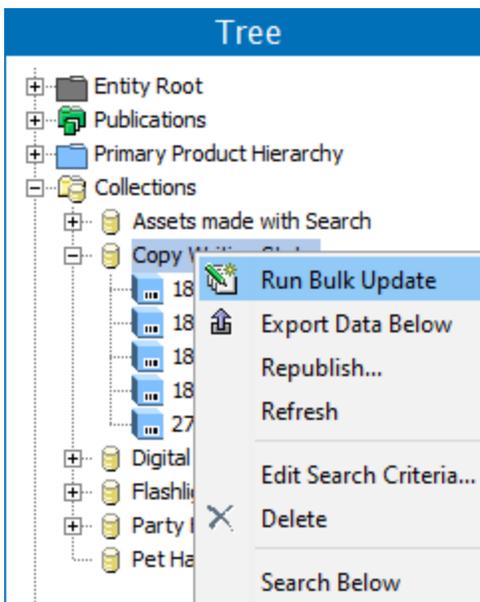
A user can run the bulk update process on a collection, a search result, or objects in tree or system setup. It is also possible to select multiple objects and run a bulk update on all selected objects. See the **Running Bulk Updates** topic within the **Bulk Updates** documentation for more information.

Running Bulk Updates

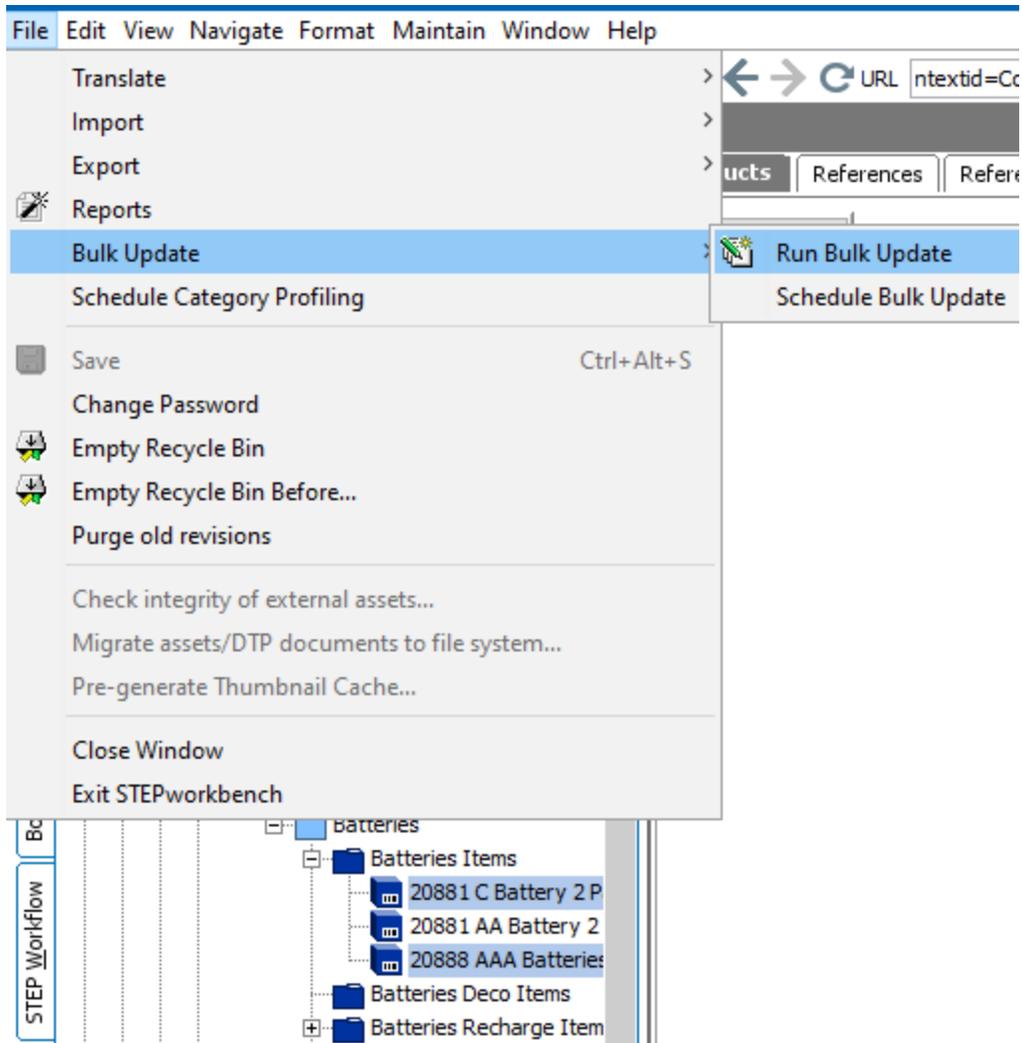
The bulk update functionality allows a user to easily update large amounts of objects in a single operation.

There are three possible ways to run a Bulk Update:

1. It can be run on all objects in a single collection or multiple collections. To do so, right-click the relevant collection(s) in Tree and choose **Run Bulk Update**.



2. It can be run on a single or multiple selected objects in Tree or System Setup. To do so go to File > Bulk Update > **Run Bulk Update**.

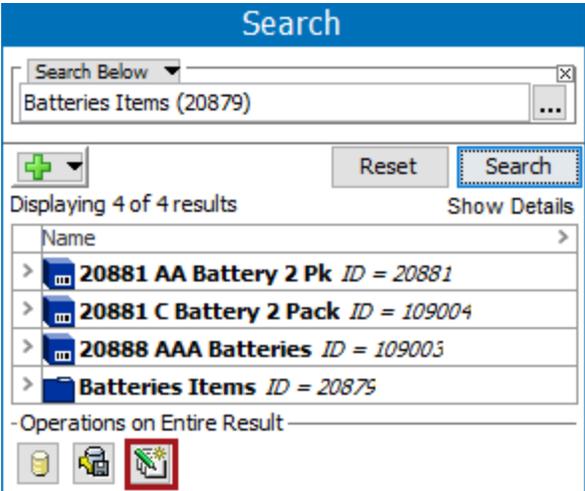


Objects that it can be run on in Tree are:

- Assets
- Classifications
- Collections
- Configurations
- eCatalogues
- Entities
- Index Words
- Products
- Publications

Objects that it can be run on in System Setup are:

- Attributes
 - Attribute Transformations
 - Asset Importer
 - Change Packages
 - Completeness Metrics
 - Event Processors
 - Event Queues
 - Gateway Endpoints
 - GDSN- Data pool- Receiver or publisher
 - Global Business Rules (actions, conditions, and libraries)
 - Inbound Integration Endpoints
 - Keys
 - List of Values
 - Match Codes and Matching Algorithms
 - Outbound Integration Endpoints
 - Tables
 - Tags
 - Units
 - Users and Groups
 - Web UIs
 - Workflows
 - Workflow Profiles
 - Reference types / link types
 - Object type & structures (asset, classification, publication, setup group, etc.)
 - Context -Dimension points
3. Lastly, it can be run on search results. To do so, perform a search and then click on the **Bulk Update** button, , at the bottom of the **Search** pane.



For more on how to perform searches using the Search tab in STEP Workbench, see the **Search Overview** topic in the **Getting Started / User Guide** documentation.

After selecting one of the three options above to run a bulk update, the Bulk Update wizard will appear. Steps for navigating through the Bulk Update wizard are described in the **Bulk Update Wizard** in the **Bulk Updates** documentation.

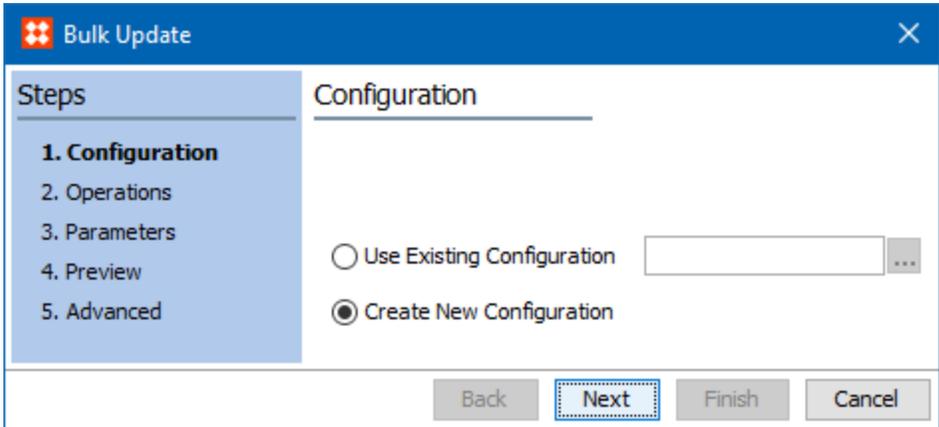
Bulk Update Wizard

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

Step 1 - Configuration

In step 1, specify whether an existing configuration should be run for the bulk update, or if a new configuration should be created.

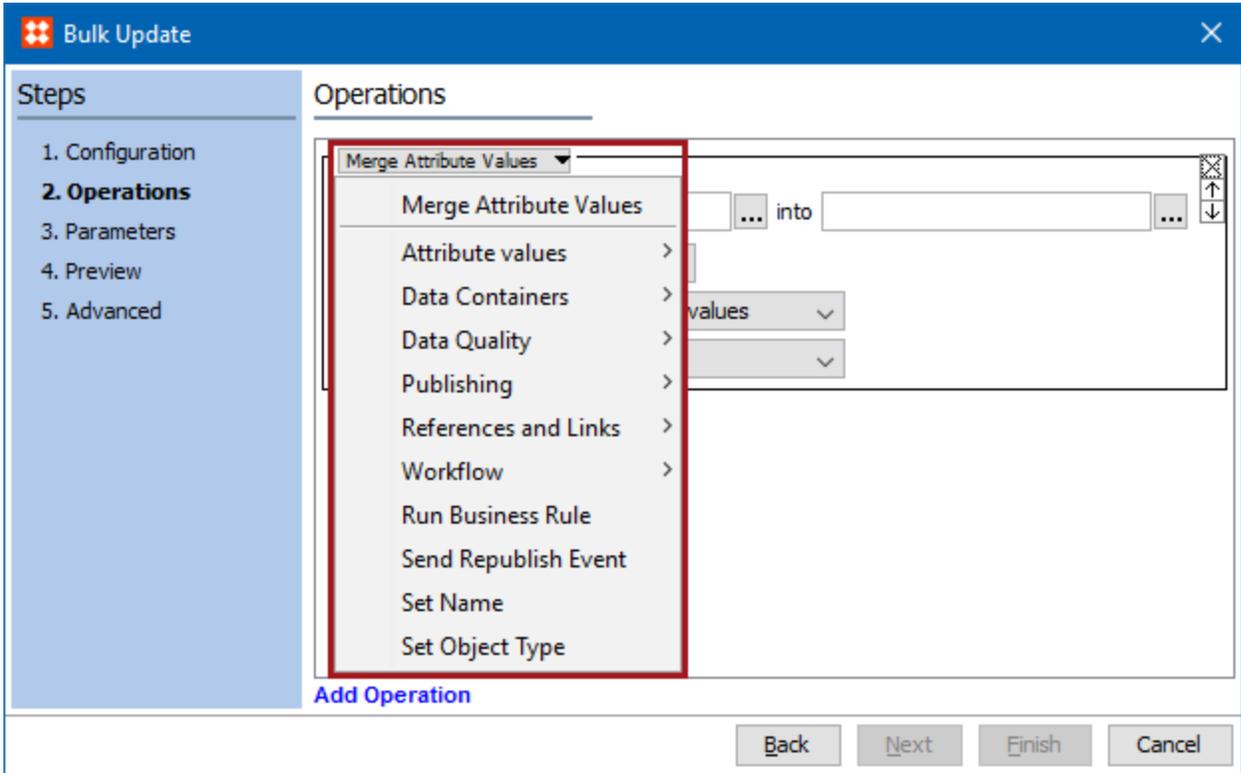
If a user has a saved bulk update configuration they can click the ellipsis button (...) to select the relevant configuration. Otherwise, select **Create New Configuration**, and click **Next**.



Step 2 - Operations

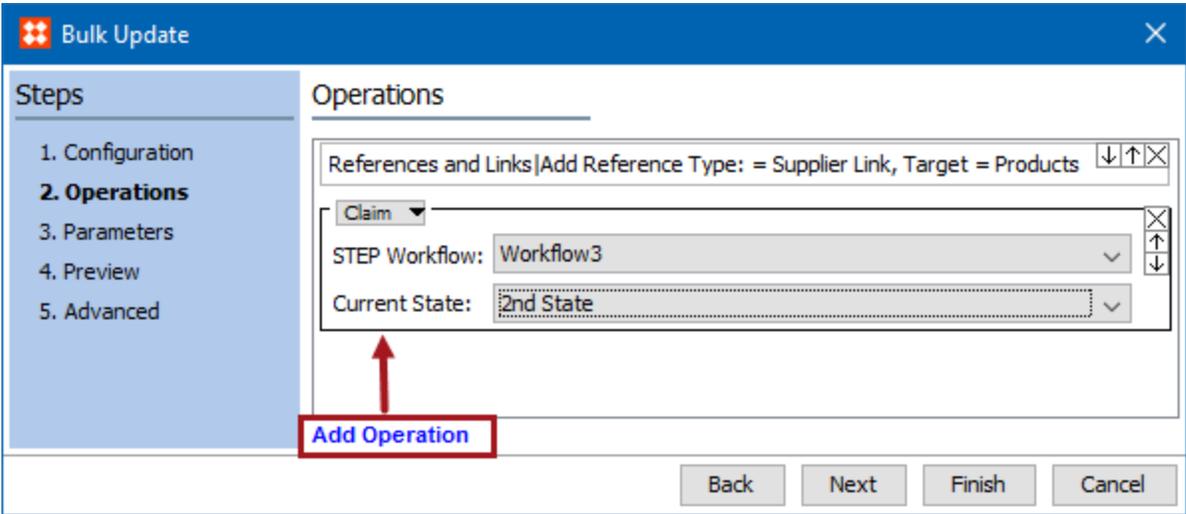
In step 2, specify the operations needed for the bulk update to perform. If an existing configuration was selected, all operations are listed in the order they are carried out.

If an operation is not already present, select from the dropdown menu the operations that should be applied to the set of objects.



The selected operation dictates what elements need to be filled out. The required elements vary from operation to operation. For a detailed description of the operations, see the **Bulk Update Operations** topic within the **Bulk Update** documentation.

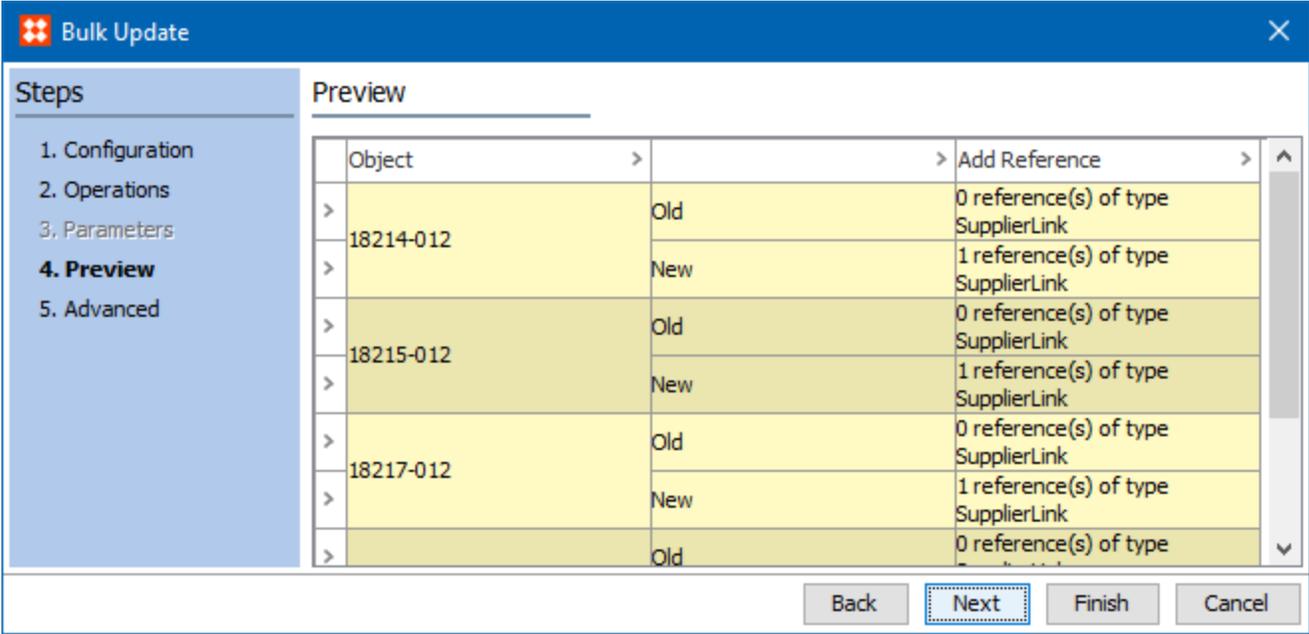
More than one operation can be applied to a bulk update by selecting 'Add Operation'. To change the order of the operations applied to the update, use the up and down arrows . An operation can be deleted by clicking the



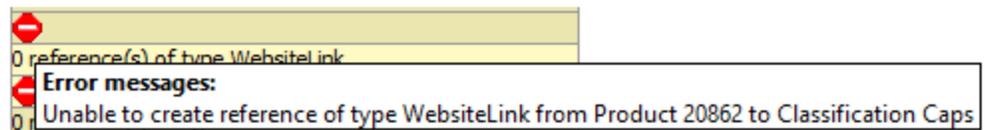
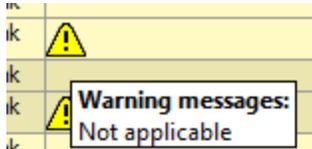
Important: Ensure that the operations are listed in the order that they are needed to perform. Operations are performed from the top down. This means that operations further down the list overwrite operations further up. This includes when more than one operation is specified. The operations still are applied in the listed order. If one operation fails for an object (ex: due to validation base type mismatch), all changes to the object will be rolled back and the object will be left as if was prior to applying the Bulk Update.

Step 3 - Preview

This screen shows examples of the results of the update. It displays a maximum of 10 objects. For each object the existing data and how the data will look after the update is applied displays.



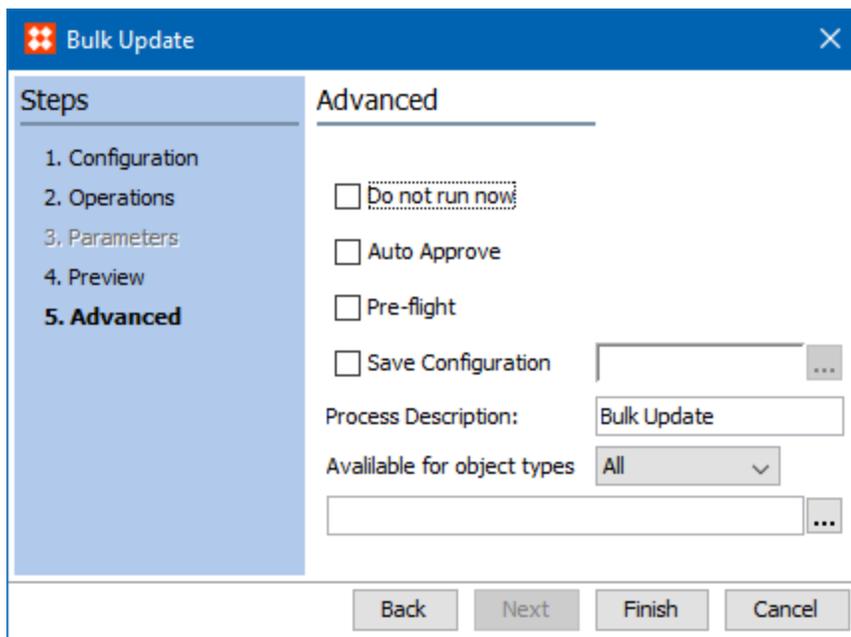
The preview also displays warnings and errors if an operation that a user has chosen is not applicable. If a user hovers the cursor over the icons, they can see the error or warning text.



Click the **Back** button to change an operation or parameter. When satisfied with the preview, click **Next** to continue.

Step 4 - Advanced

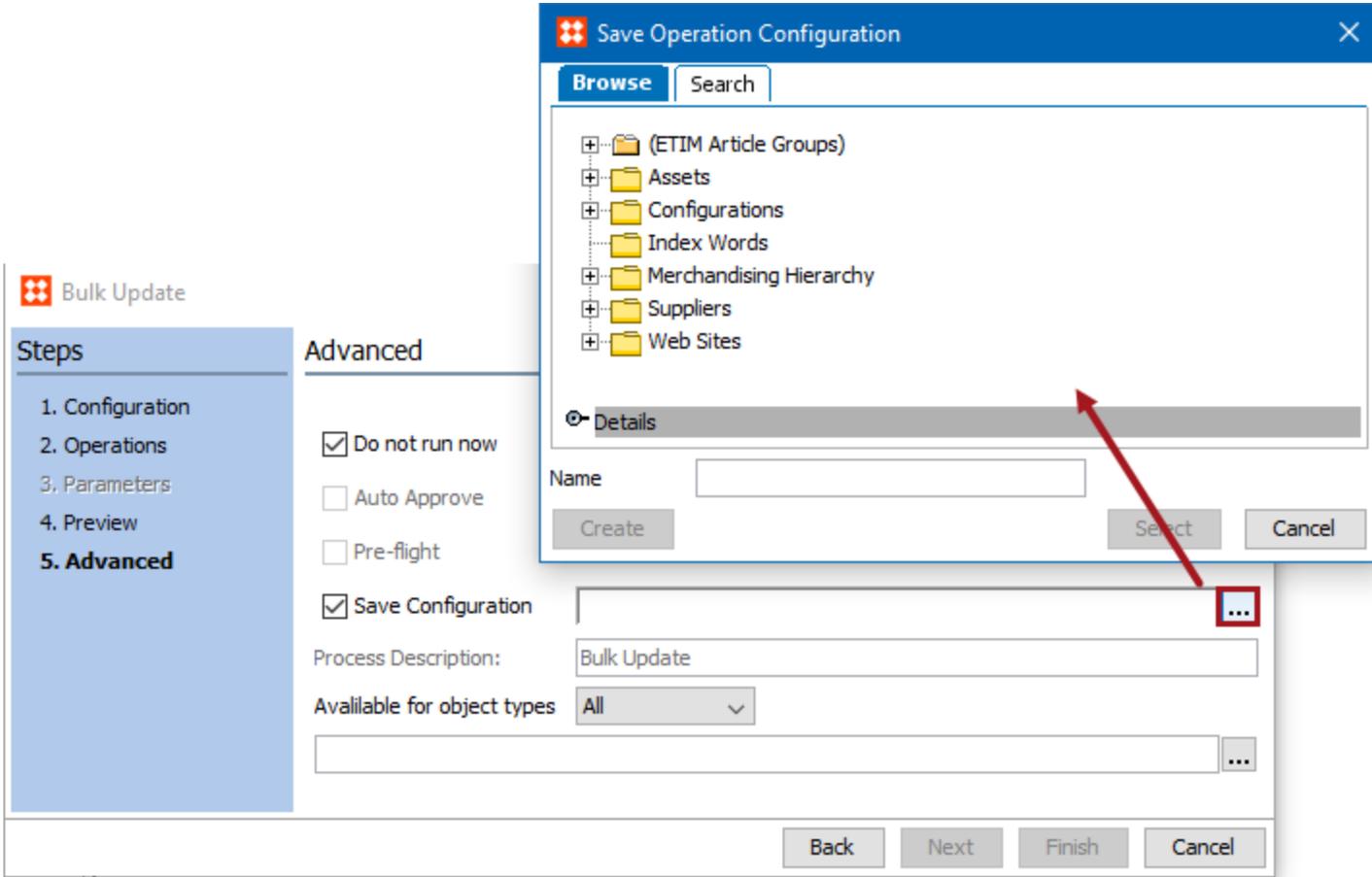
In the final step, select one or more options, some of which can be selected simultaneously.



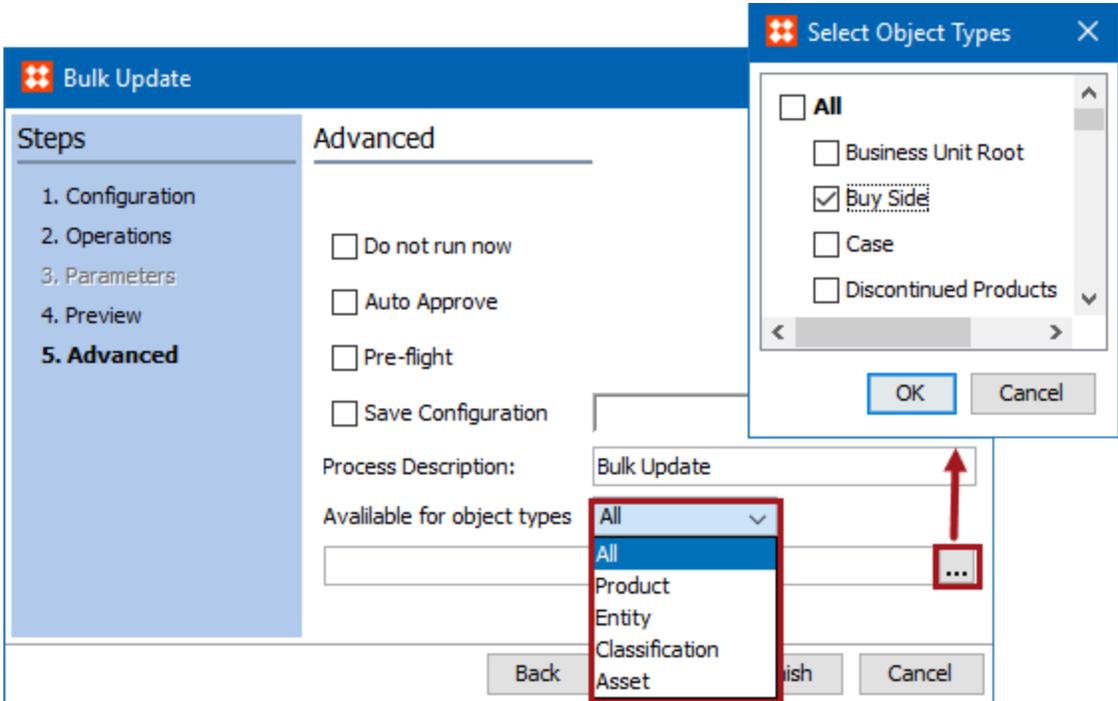
- Selecting **Do not run now** allows the user to run the bulk update later, and not immediately when the wizard is finished. When selecting this option, a user can still save the configuration, but **Auto Approve** and **Pre-flight** are disabled.
- Selecting **Auto Approve** approves the objects automatically after the update, and then places the objects in the approved workspace.
- Selecting **Pre-flight** allows a user to perform a test run of the update. When the user clicks 'Finish', the test runs in the background. This will apply the operations selected, and then roll them back. Additionally an execution report and an Impact Report will be generated. Temporary collections will also be created for the objects where the operations were successfully applied, and for the ones where errors were generated. The availability of this option depends on the user's system setup.

Note: It is recommended to always run a Pre-flight test or to try applying operations to a small set of objects before large quantities of objects are updated, as there is no 'undo' functionality for bulk updates.

- Selecting **Save configuration** allows a user to save the configuration so that it can be used again.



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



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

For more on monitoring bulk updates through a background process, see the **Monitoring Bulk Updates** topic in this documentation.

Bulk Update Operations

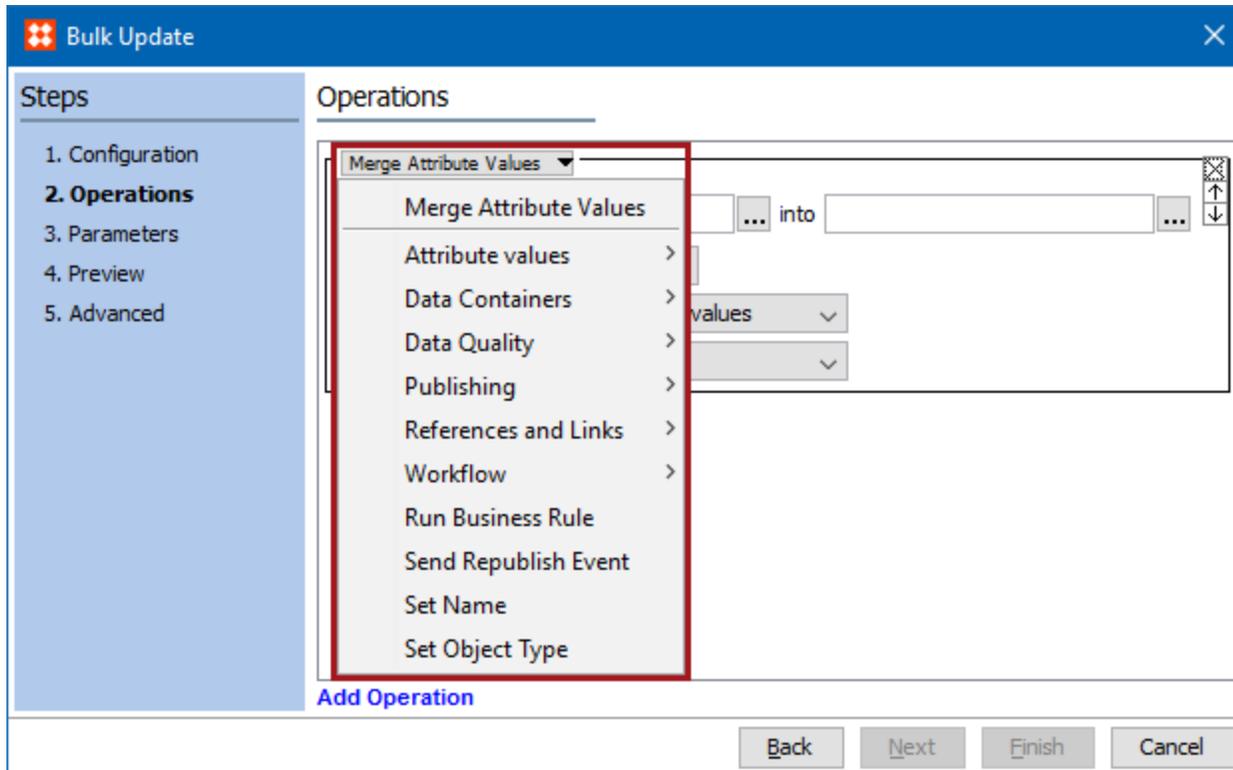
There are a number of operation options available when performing a bulk update. Because more than one operation type can be applied during a bulk update, and the order in which the operations are listed matter when performing a bulk update, it is important to fully understand what each operation does.

Note: Ensure that the operations are listed in the order that they are needed to perform. Operations are performed from the top down. This means that operations further down the list overwrite operations further up.

The following sections contain explanations of each operation type available in the Bulk Update wizard.

- Attribute values
- Data Containers
- Data Quality
- Publishing
- References and Links
- Workflow
- Run Business Rule
- Send Republish Event
- Set Name
- Set Object Type

Operations are can be chosen in the Operations step of the Bulk Update wizard.



See the **Running Bulk Updates** topic within the **Bulk Update** documentation for more information on the Bulk Update wizard.

For some of the operations, a user can specify a function in the Function editor. See the **Using Function Editor** topic within the **Attributes** documentation for more information on writing functions.

Attribute Values Operations for Bulk Updates

The following operations allow you to modify attribute values.

Merge Attribute Values

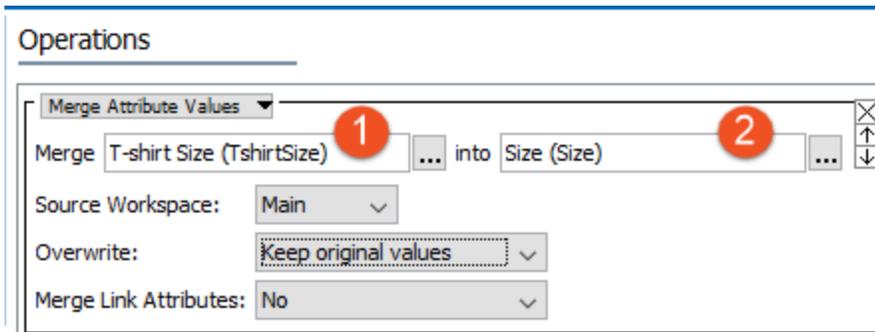
Copies the values from the first selected attribute to the other, in the current workspace, based on the parameter settings. For dimension dependent attributes, the copy is performed across all dimensions or applicable combinations of dimensions.

Verifying Attributes for Merge

This operation can also 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, see the **Merging Attribute Values** section of the **System Setup / Super User Guide**.

To merge attribute values for only some objects, go to the **Search** tab, and create Search Results of the objects to merge. Then either click the **Collections** button to save the results as a collection (which can be used for repeated updates), or click the **Bulk Update** button and click **Next** to display the Operations page and the following Merge Attribute Values parameters.

Merge Attribute Values Operation



1. In the **Merge** parameter, click the ellipsis button (...) to display the Select Attribute dialog, choose the attribute to copy values from, and click the **Select** button.
2. In the **into** parameter, click the ellipsis button (...) to display the Select Attribute dialog, choose the attribute to copy values to, and click the **Select** button.
3. For the **Source Workspace** field, use the dropdown to select the workspace that holds the values to be copied to the target, based on the other parameters. Values are always pasted into the Main workspace.

Consider the following example data, and assume we will choose to Overwrite existing values (as described below). 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.

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

4. For the **Overwrite** field, choose an option to determine when to write to the target attribute. Validation errors are displayed on the Preview page when a value cannot be modified.

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:

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

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

Preview

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

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

Preview

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

- 5. For **Merge Link Attributes** field, 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.

For example, consider the following values for the attributes 'Qty of Next Lower Package' and 'Qty of Next Higher Package' on the Case to Child reference.

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

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

Preview

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

For more information about attributes on references, see the **Product Attribute Link Type** section of the **System Setup / Super User Guide** 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.

Set Value

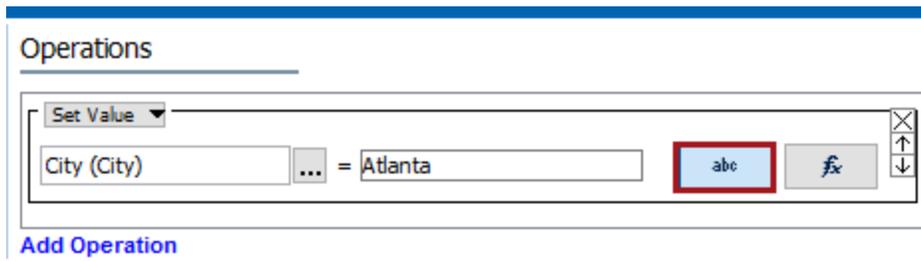
Sets the value of the selected attribute based on a value entered manually or via a function.

Manual Values

1. Click the ellipsis button (...) on the first field and select the attribute that will be updated.

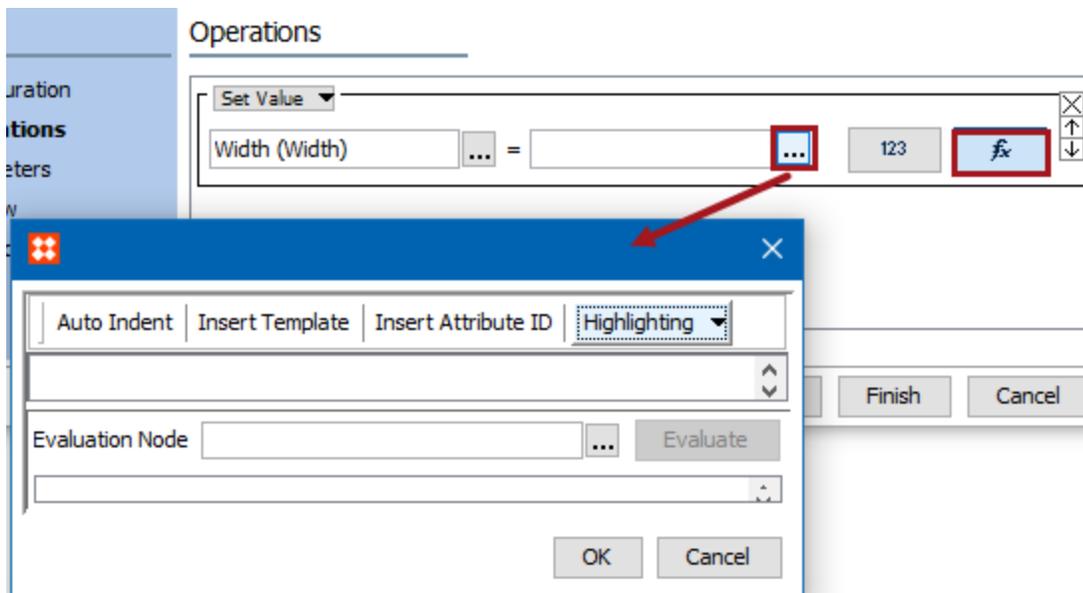
Note: The selected attribute dictates the label on the manual button. In the image below, the selected attribute requires a text value and so the label is 'abc.' If the selected attribute is numeric, '123' is displayed, and so on for each validation base type.

2. Since the manual value button is selected by default, enter the desired value in the '=' field. The value of the selected attribute will be set equal to this manual value.



Function Values

1. Click the ellipsis button (...) on the first field and select the attribute that will be updated.
2. Click the 'fx' button to indicate a function will be used.
3. Click the ellipsis button (...) on the '=' field to display the function editor.
4. Enter a function based on the requirements that will resolve to the desired value.



See the **Using Function Editor** topic within the **Attributes** documentation for more information on writing functions.

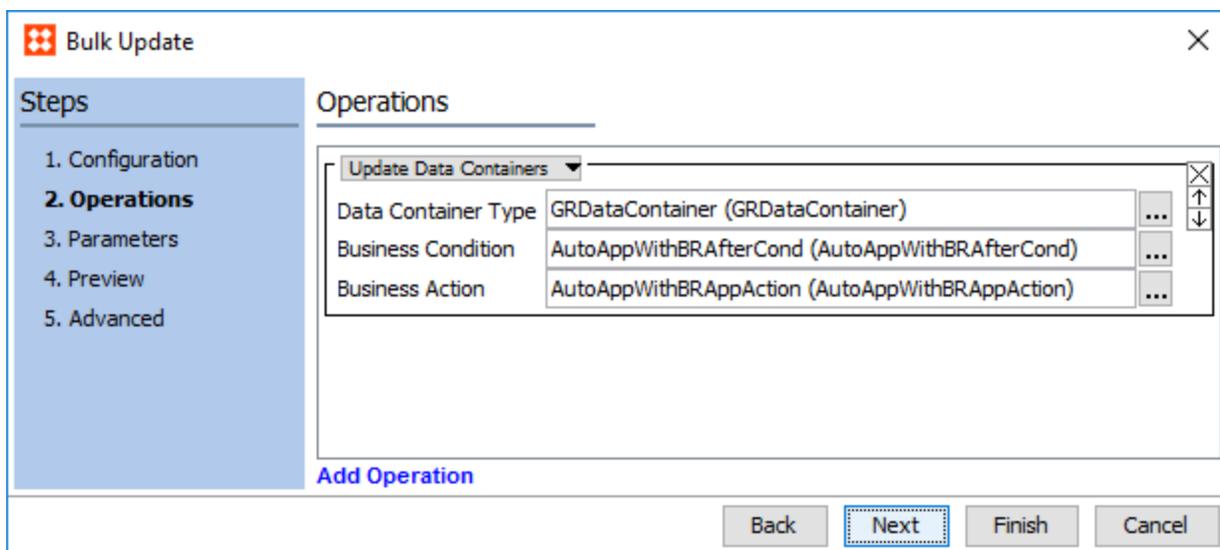
Data Containers Operations for Bulk Updates

The options for Data Containers operations are below:

Update Data Containers

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.

1. Run a search for data containers based on the desired criteria, and run the bulk update by clicking the Bulk Update icon.
2. On the 'Operations' step of the wizard, click **Add Operation**, and select Data Containers > Update Data Containers.



3. In the **Data Container Type** parameter, click the ellipsis button (...) and select the data container type this operation should apply to. This is an optional selection.
4. In the **Business Condition** parameter, click the ellipsis button (...) and select a business condition to filter eligible data container objects further. This is an optional selection.
5. In the **Business Action** parameter, click the ellipsis button (...) and select a business action to apply to the data container objects upon execution of the bulk update. This is a required parameter.

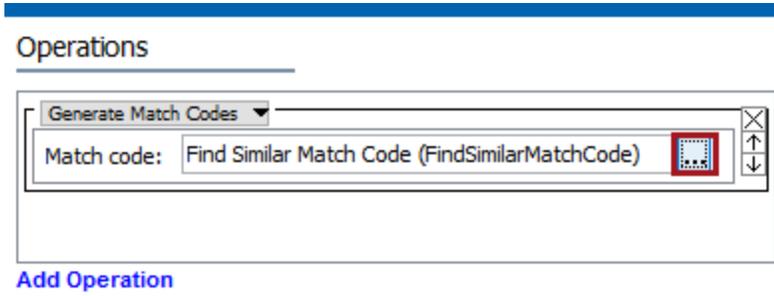
Data Quality Operations for Bulk Updates

The options for Data Quality operations are below:

Generate Match Codes

For this operation, a user needs to select which match code to use. Once selected, it will then generate match code values for the selected objects of the bulk update.

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



For more on match codes and how to create them see the **Configuring Match Codes** topic in the **Matching and Linking** documentation.

Match Duplicates (apply matching algorithm)

DEPRECATED. Suggested to instead use 'Send Republish Event' to Event Processor configured to apply matching using user's matching algorithm.

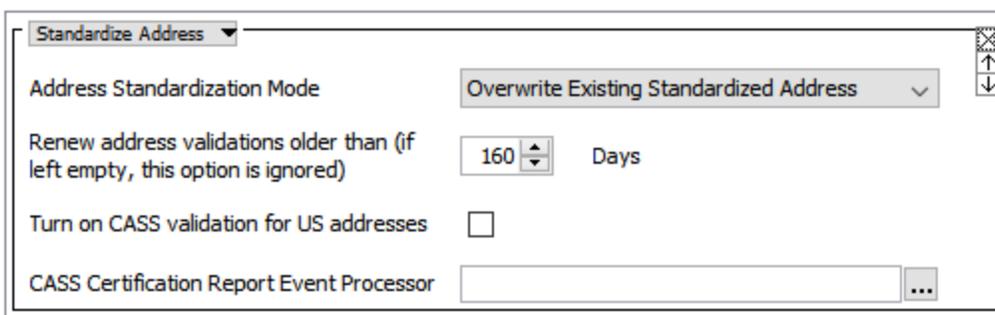
User will have to select which Matching Algorithm to use.

Will then apply the matching algorithm on selected objects of this 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 linkages and re-apply survivorship rules.

Standardize Address

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).



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, see the **Loqate Integration** section of the **Data Integration** documentation.

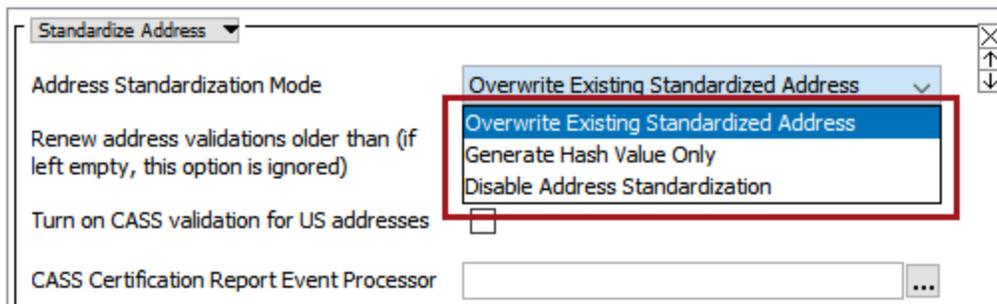
Prerequisites

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, see the **Address Component Model** section of the **Loqate** documentation.
- To view and use the CASS features, users must:
 - Purchase a CASS license
 - Be connected to Loqate through a *local* API (CASS components will not work with a Loqate Cloud API)
 - Be based in the US, as CASS is not valid outside of the US
 - Configure the CASS Address Component Model. For more information, see the **CASS Address Component Model** topic in the **Loqate** documentation.

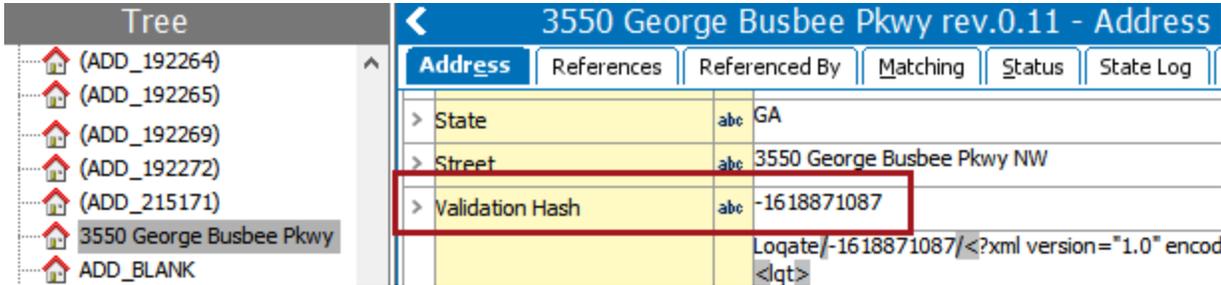
Address Standardization Modes

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.

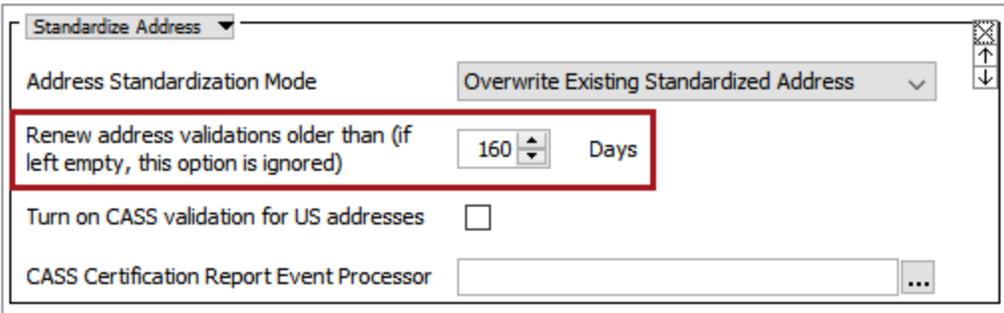
This option is used in cases when pre-standardized addresses, which are known to be correct, are imported. Because the addresses are new, no hash value is present. When the 'Generate Hash Value only' action is run, STEP generates a hash value and places it into the 'Validation Hash' field. The hash value 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.



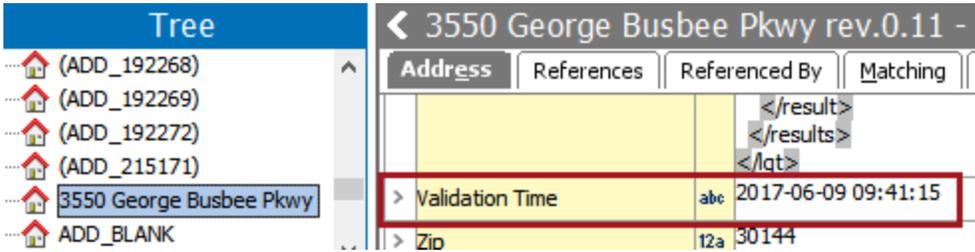
- Disable Address Standardization:** This option is primarily useful for users who import addresses in bulk, either manually or by using an inbound integration. If a business rule is in place that runs a Standardize Address bulk update on import, then selecting 'Disable Address Standardization' is a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

Renew Address Validations

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



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



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

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

Standardize Address

Address Standardization Mode: Overwrite Existing Standardized Address

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

Turn on CASS validation for US addresses:

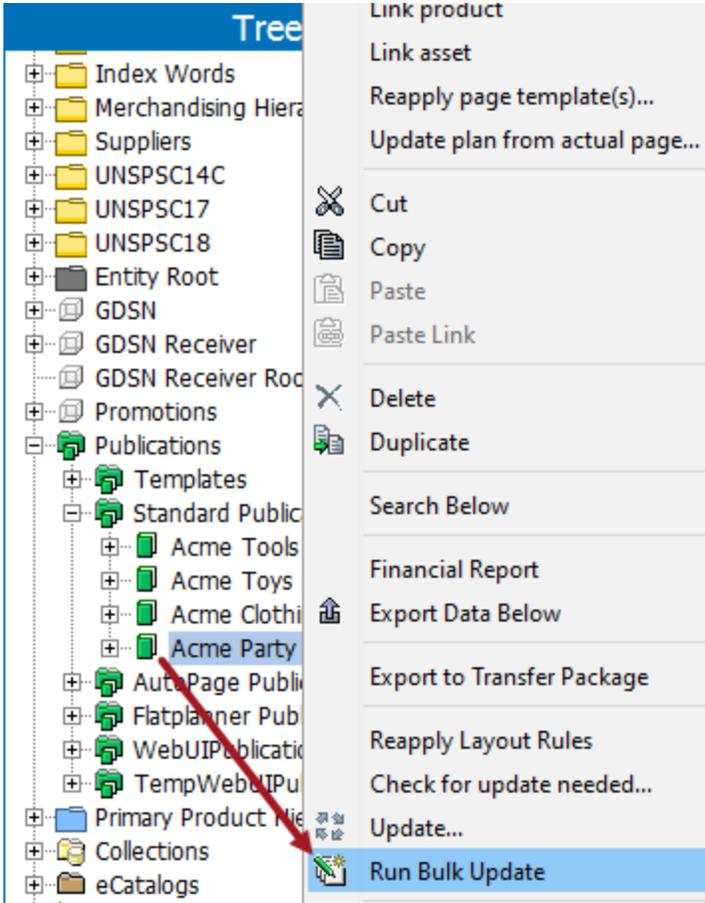
CASS Certification Report Event Processor: []

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

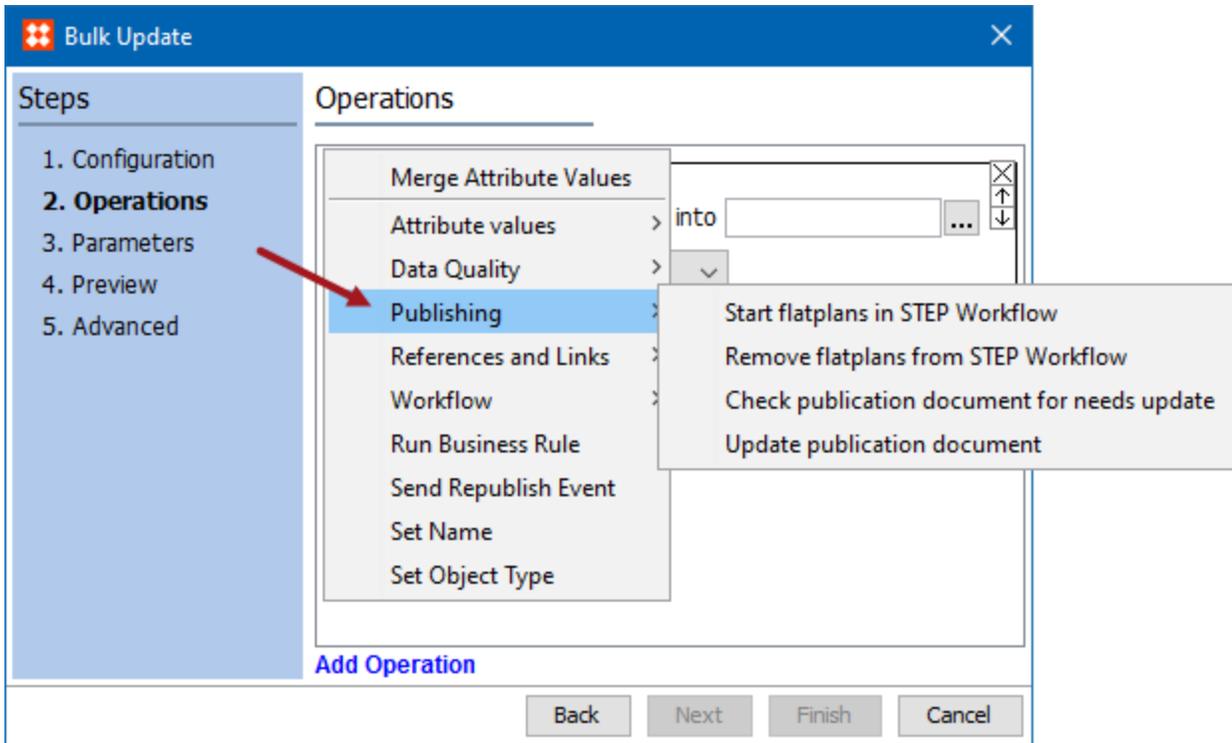
Publishing Operations for Bulk Updates

Several bulk update operations are available for publications in STEP.

Bulk update operations for publications can be accessed either by selecting File > Bulk Update > Run Bulk Update, or by right-clicking on a publication group object, publication object (pictured in the below screenshot), section object, or DTP document in the publication hierarchy and selecting **Run Bulk Update**.



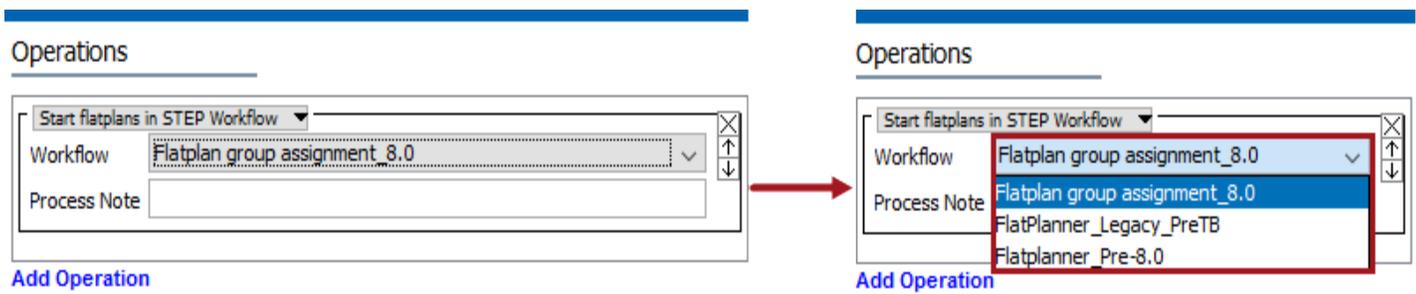
Once the Bulk Update wizard is launched, the publishing options are accessed in step 2 of the Bulk Update wizard (Operations) by selecting 'Publishing' from the operations dropdown menu.



Start flatplans in STEP Workflow

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 going to File > Bulk Update > Run Bulk Update.

The desired workflow is chosen from the 'Workflow' dropdown list. Note that only workflows valid for planned pages will appear. Flatplans that are already in a workflow are not affected.

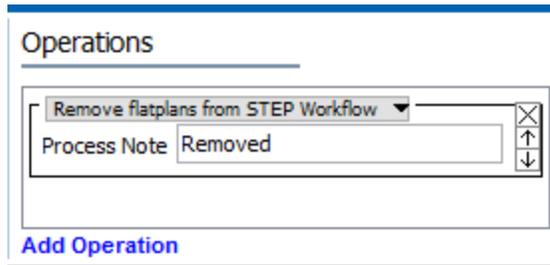


After selecting which workflow to initiate the Flatplans into, a 'Process Note' can be entered to name the resultant background process.

Remove flatplans from STEP Workflow

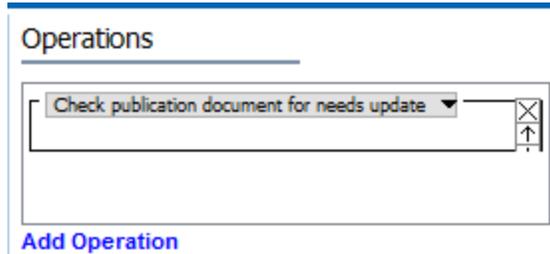
This option is legacy functionality (pre-STEP 8.0) from when only one workflow at a time was allowed for planned pages. There is no ability to select a specified workflow.

A 'Process Note' can be entered to name the background process that takes place.



Check publication document for needs update

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



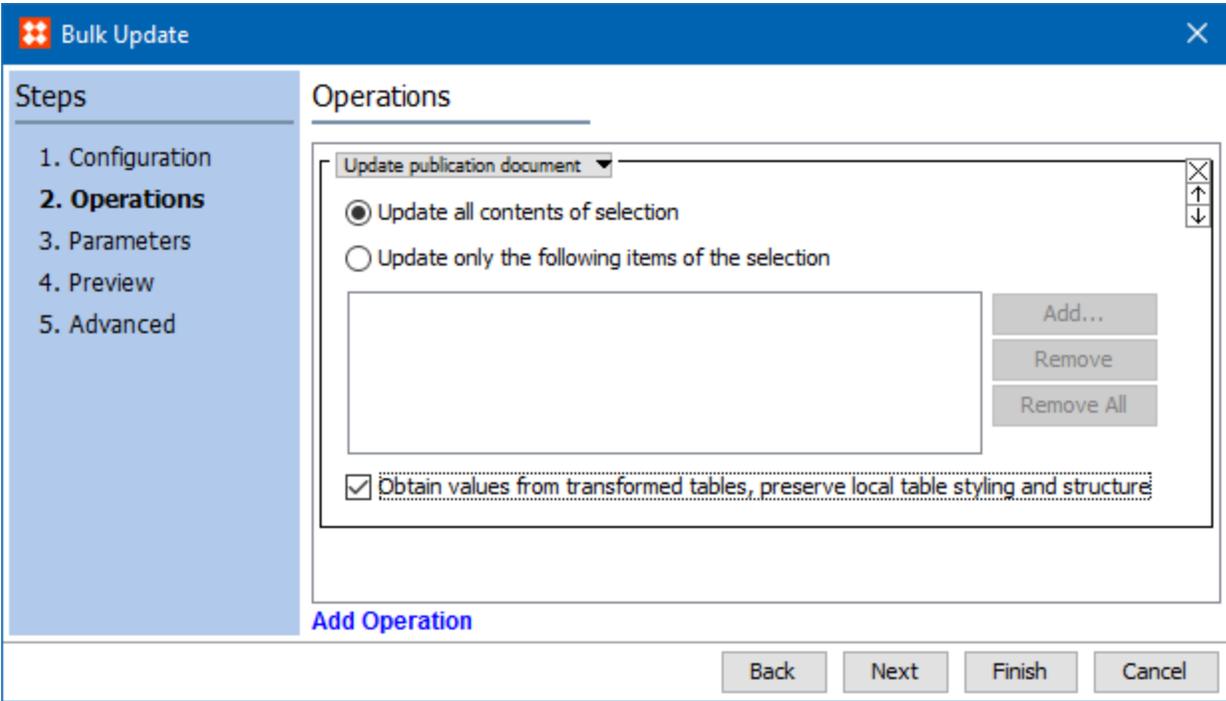
Checking documents for updates is only useful for AutoPage and Flatplanner publications. Since near-identical functionality can be accessed from other locations in the workbench (including right-clicking on a publication or section object in the Tree and clicking 'Check for update needed...'), the use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

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

Update publication document

When updating a publication document there are two options to choose from:

1. **Update all contents of section:** This updates all information on all actual pages saved to the selected publication, section, or DTP document.
2. **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.



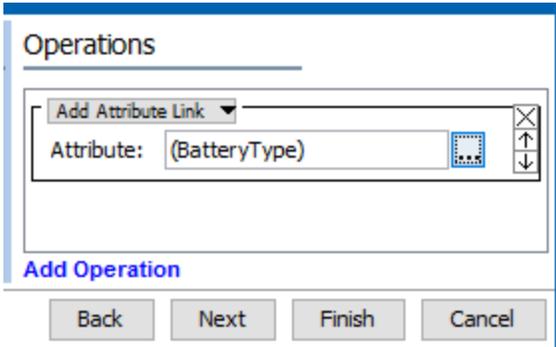
The 'Update publication document' bulk update option functions almost identically to the **Update** feature that is directly accessed by right-clicking on publication, section, or DTP document objects in the Tree. The selections in the 'Operations' dialog pictured above are identical to those in the '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 STEP'n'design documentation instead. See **Updating Documents From the Workbench** in the **STEP'n'design** documentation for more information.

References and Links Operations for Bulk Updates

Bellow are all options for adding references and links:

Add Attribute Link

When choosing this object, the selected attribute will be linked to the collection of valid objects.



If an attribute is on an object, it is also viewable by going to the References tab on the object, and selecting the flipper 'Linked Attributes from Product Hierarchy'. If there is an attribute that does not have an edible field (or link) to store data, choosing this option adds a link to an attribute, and allows data to be stored.

The screenshot shows the 'Flashlights Items rev.0.5 - References' interface. On the left, a tree view shows the product hierarchy: Primary Product Hierarchy > Products > Hardware > Task Lighting > Flashlights > Flashlights Items. The main panel displays the 'References' tab with a table of linked attributes. The table has columns: (DisplaySequence), Completeness Score, ID, Name, (Product Variant Priority), and (Value2). The 'BatteryType' row is highlighted with a red box.

(DisplaySequence)	Completeness Score	ID	Name	(Product Variant Priority)	(Value2)
>		BatteriesIncluded	(BatteriesIncluded)		
>		BatteryType	(BatteryType)		
> 5	▼	BrandName	(BrandName)		
> 6	▼	BrandOwner	(BrandOwner)		
>		Brightness	(Brightness)		



This screenshot is identical to the one above, showing the 'Flashlights Items rev.0.5 - References' interface. The 'BatteryType' row is now highlighted in yellow, indicating it has been successfully added or updated.

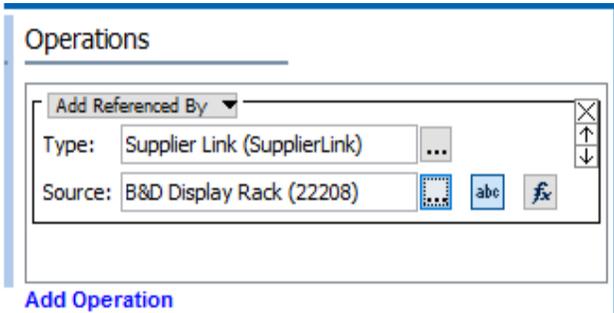
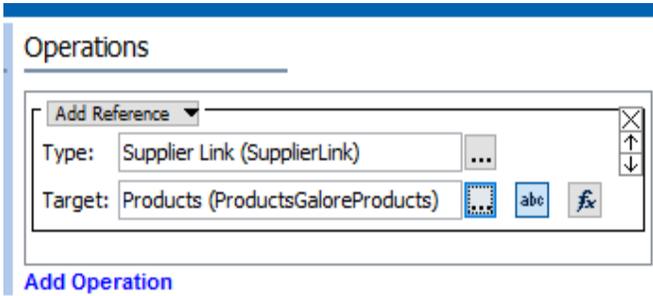
For more information on linked attributes see the **Attribute Links** topic in the **System Setup / Super User Guide** documentation.

Add Reference or Add Reference By

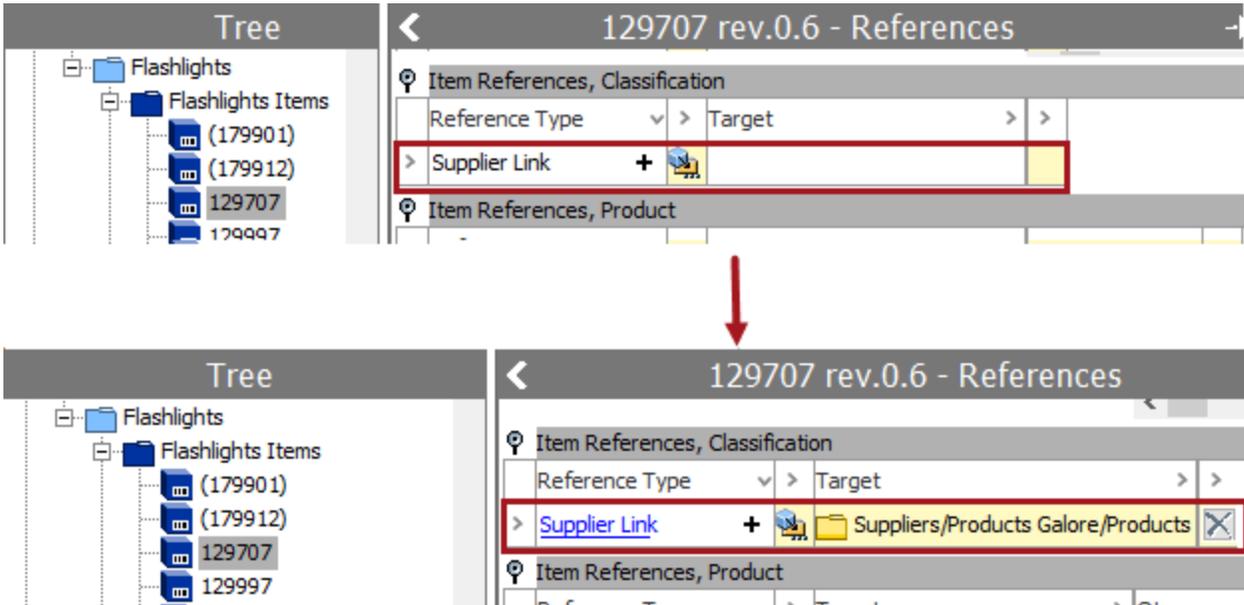
Add Reference and **Add Reference By** both have similar configurations for bulk updates. Performing this action for **Add Reference** adds a reference of a specified type to a target. Alternatively, for **Add Reference By** this adds a reference from a target to the source. It is important that the objects that are to receive the reference are

selected before the bulk update is run.

First, select a reference type, and then choose a target (object) or Source that is in accordance with the selected type.



When finished, a user should see the added type reference to the target. An example using **Add Reference** is below:



Similarly, a user could specify a function in the function editor by selecting the 'fx' button and clicking the ellipsis buttons to bring up the editor.

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

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

The screenshot displays the '129707 rev.0.7 - Product' detail view. On the left, a tree view shows 'Flashlights' items with IDs ranging from 179901 to 134863. The main panel shows a 'Description' table with the following data:

Name	Value
ID	129708
Name	129707
Object Type	Item
Revision	0.7 Last edited by USERL on Mon Sep 12 0
Approved	Never Been Approved
Translation	Not Translated
Parent	Flashlights Items
Path	Hardware Tools Task Lighting Flashligh
Product Image	abc 184812

An 'Operations' dialog box is open, showing 'Add Reference' with 'Type: Primary Product Image (PrimaryProductImage)' and 'Target: prodval("Product Image")'. A red arrow points from the 'Product Image' field in the table to the 'Target' field in the dialog.

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.

The screenshot displays the '129707 rev.0.7 - References' view. The left sidebar shows a tree view of 'Flashlights' items with IDs ranging from 179901 to 134855. The main panel shows a table of 'Image References' with the following data:

Reference Type	Target	Thumbnail
Brand Name Logo		
Illustration		
Primary Product ...	MagLiteFlashlight	

The 'Primary Product ...' row is highlighted with a red box, and a red arrow points from the 'Product Image' field in the previous screenshot to this row.

Automatic Classification

Classifies the selected objects automatically according to a set of rules. To perform this operation, a user selects the following:

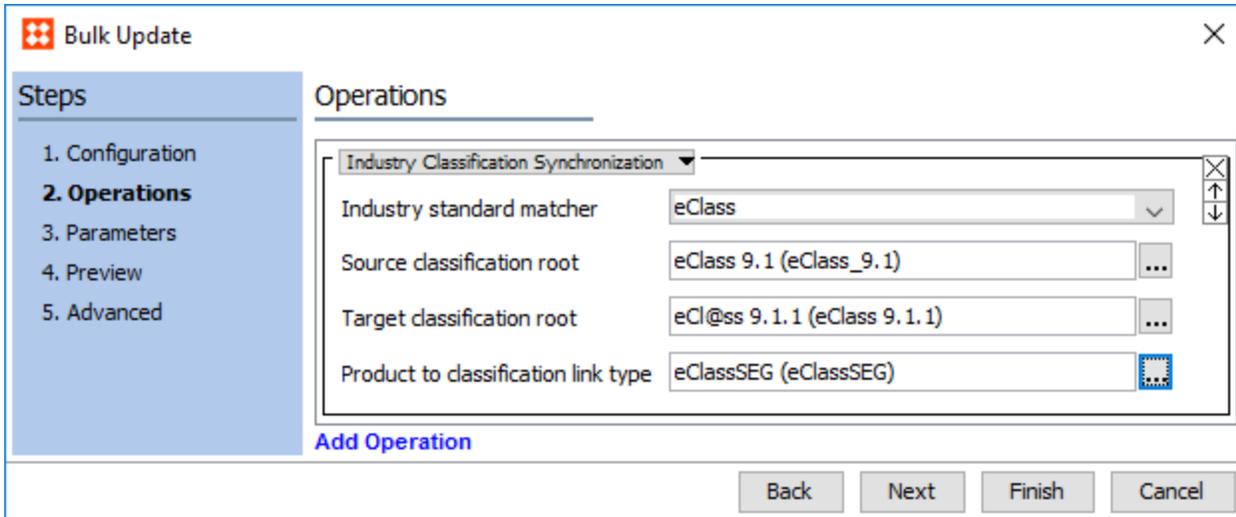
- A rule set which is selected using the ellipsis button.
- The context in which the rule conditions should be evaluated.
- If 'Use approved rule set' is checked, then only approved rule sets can be used for this operation.

See **Automatic Classification** documentation for more information.

Industry Classification Synchronization

This operation allows users to reclassify products to newer eCl@ss, ETIM, or UNSPSC versions. When executing this operation the specified product to classification link type will be overwritten with the new version of the classification hierarchy for all updated products.

1. Run a search for any products that need their classification links updated to a newer eCl@ss, ETIM, or UNSPSC classification hierarchy, and run the bulk update by clicking the Bulk Update icon.
2. On the 'Operations' step of the wizard, click **Add Operation** and select References and Links > Industry Classification Synchronization.

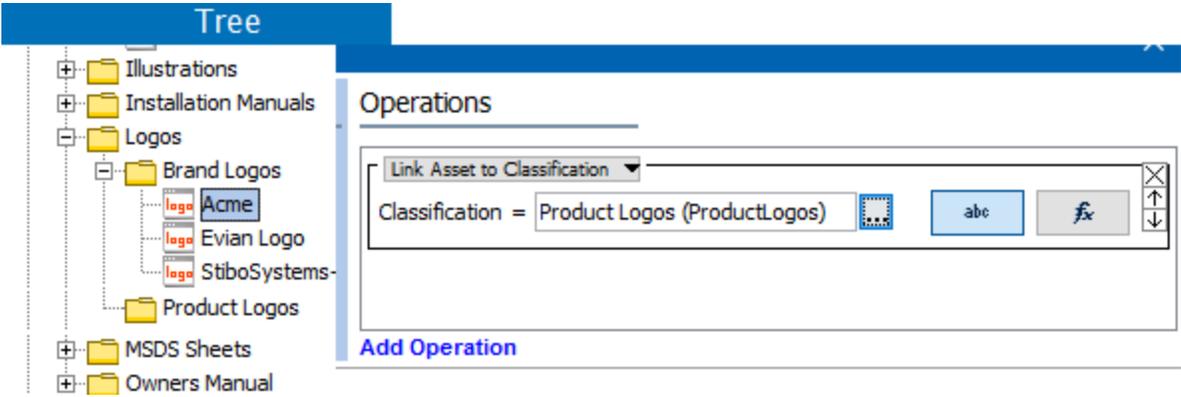


3. In the **Industry standard matcher** parameter, select the relevant industry standard from the dropdown list.
4. In the **Source classification root** parameter, click the ellipsis button (...) and select the classification root node for the original industry classification version.
5. In the **Target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

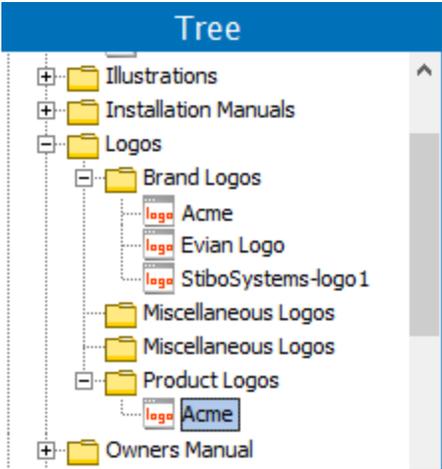
Link Asset to Classification

This allows users to link assets to a specified classification.

1. Select the assets that need to be linked, and run the bulk update by going to File > Bulk Update > Run Bulk Update
2. In the Wizard select References and Links > Link Asset to Classification
3. Select the classification the asset should be linked to and run the bulk update.



4. Assets should now appear under designated classification folder.



For more information on how to use the function editor option, 'fx', please see the **Using Function Editor** topic in the **System Setup / Super User Guide** documentation.

Remove Attribute Link

This option removes the selected link to an attribute. Note that the selected object should have a direct link to the attribute.

Flashlights Items rev.0.5 - References

Product Product Variants Sub Products References Referenced By

Publications

(DisplaySequence)	Completeness Score	ID	Name	(Product Variant Priority)	(Value2)
>		BatteriesIncluded	(BatteriesIncluded)		
>		BatteryType	(BatteryType)		
5	▼	BrandName	(BrandName)		
6	▼	BrandOwner	(BrandOwner)		
>		Brightness	(Brightness)		



Flashlights Items rev.0.5 - References

Product Product Variants Sub Products References Referenced By

Publications

(DisplaySequence)	Completeness Score	ID	Name	(Product Variant Priority)	(Value2)
>		BatteriesIncluded	(BatteriesIncluded)		
>		BatteryType	(BatteryType)		
5	▼	BrandName	(BrandName)		
6	▼	BrandOwner	(BrandOwner)		
>		Brightness	(Brightness)		

Select the attribute that is to be removed by clicking the ellipsis button, and run the bulk update.

Operations

Remove Attribute Link

Attribute: (BatteryType)

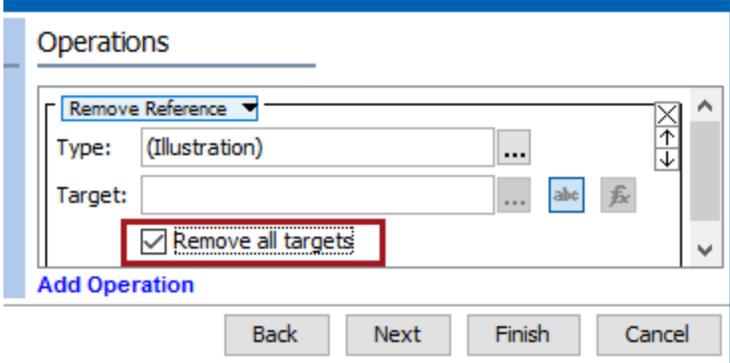
Add Operation

Back Next Finish Cancel

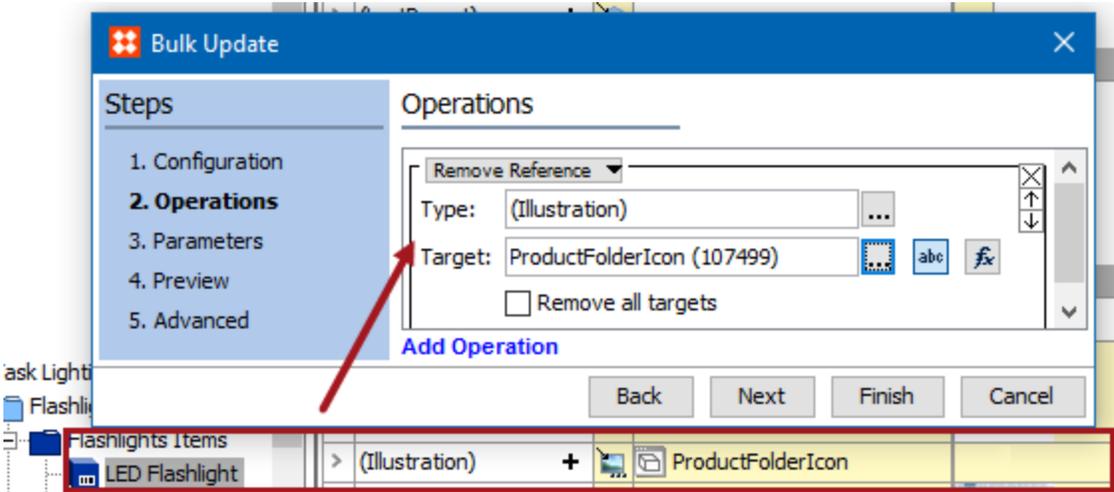
Remove Reference

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

To remove all references of a specific type select the reference type, and then check 'Remove All'.



To remove references of a specific target select a reference type, and then select the target.



This can also be done by specifying a function in the function editor. For more information on how to use the function editor option, 'fx', please see the **Function Editor** topic in the **System Setup** documentation.

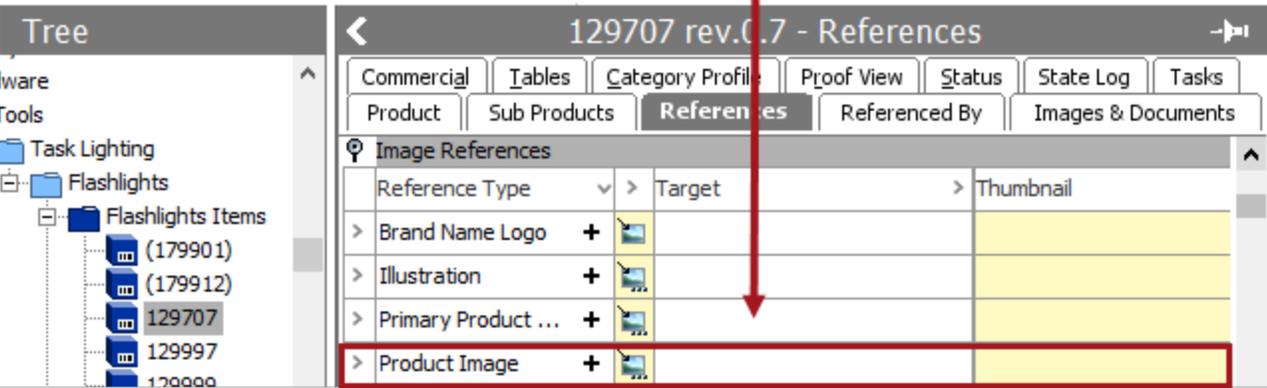
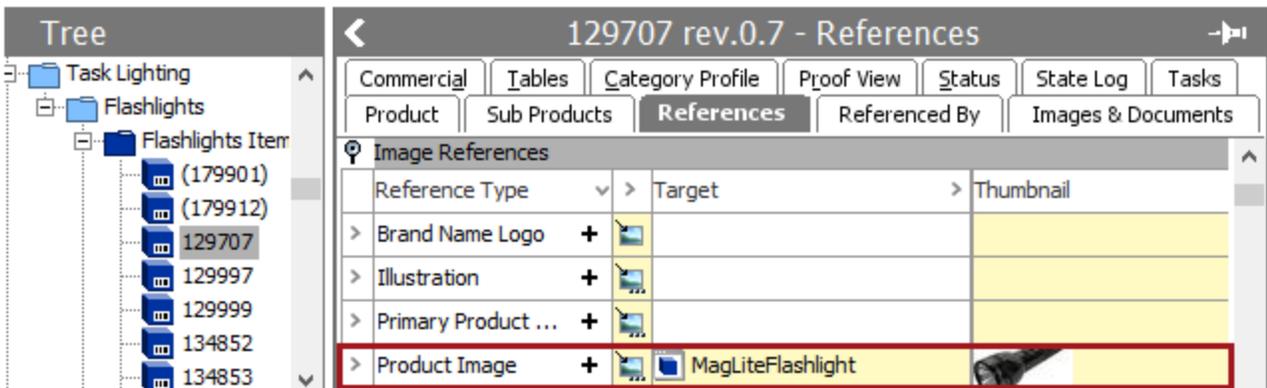
After selecting the 'Type' of reference, a user opens the function editor and types in the function needed. In this example there is an attribute on the item called 'Product Image' that holds the ID of an image asset.

The screenshot displays the Stibo Systems interface. On the left is a 'Tree' view showing a hierarchy: Hardware > Tools > Task Lighting > Flashlights > Flashlights Items. A list of items follows, with '129707' selected. The main window is titled '129707 rev.0.7 - Product' and contains a table with the following data:

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

An 'Operations' dialog box is open, showing 'Remove Reference' as the selected operation. The 'Type' is 'Product Image (ProductImage)' and the 'Target' is 'prodval("Product Image")'. A red arrow points from the '184812' value in the 'Product Image' row of the table to the 'Target' field in the dialog. The dialog also includes a 'Remove all targets' checkbox and 'Add Operation', 'Back', 'Next', 'Finish', and 'Cancel' buttons.

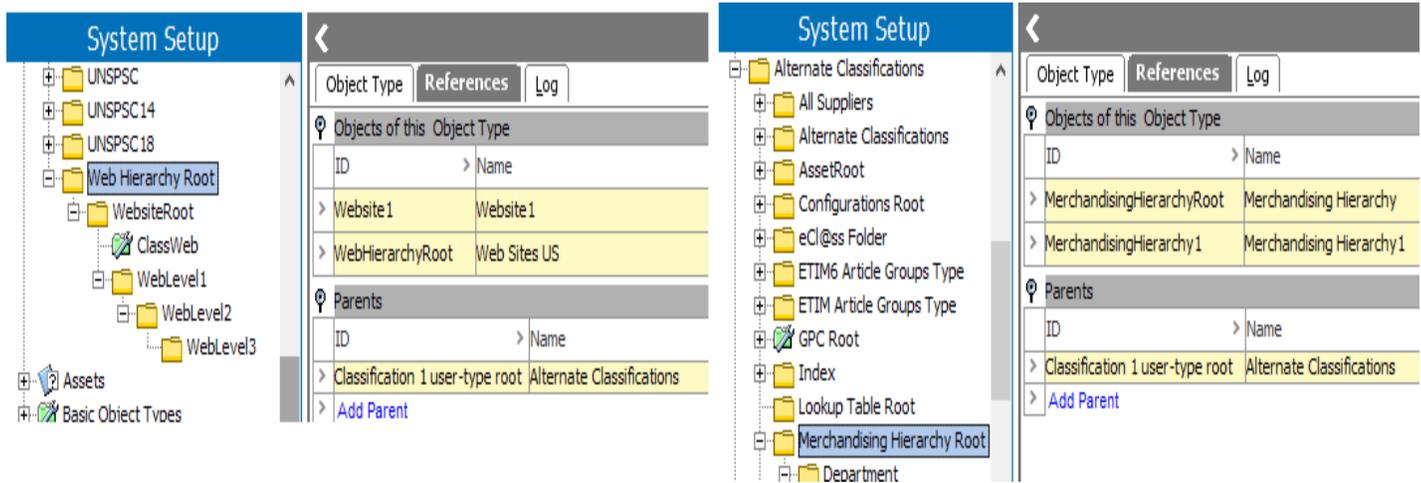
When the bulk update is run, it uses the ID in the attribute to call forth which reference to remove from the Product Image reference.



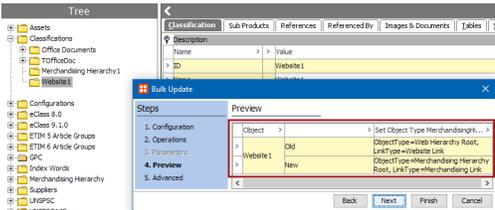
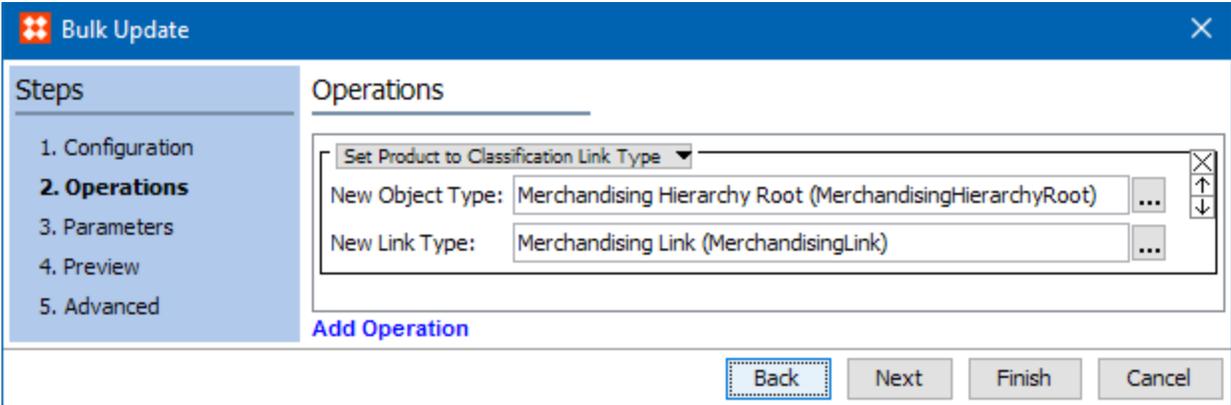
Set Product to Classification Link Type

This assigns a new object type and a classification link type to the selected classifications. To do this a new object type needs to be selected first, and then the relevant classification link type needs to be selected.

It is important to note that the object types needs to be made valid for the classification type.

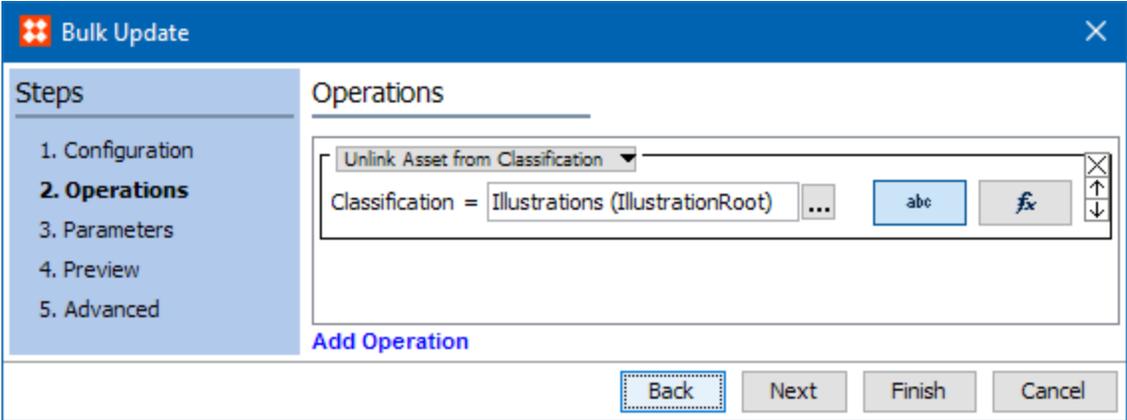


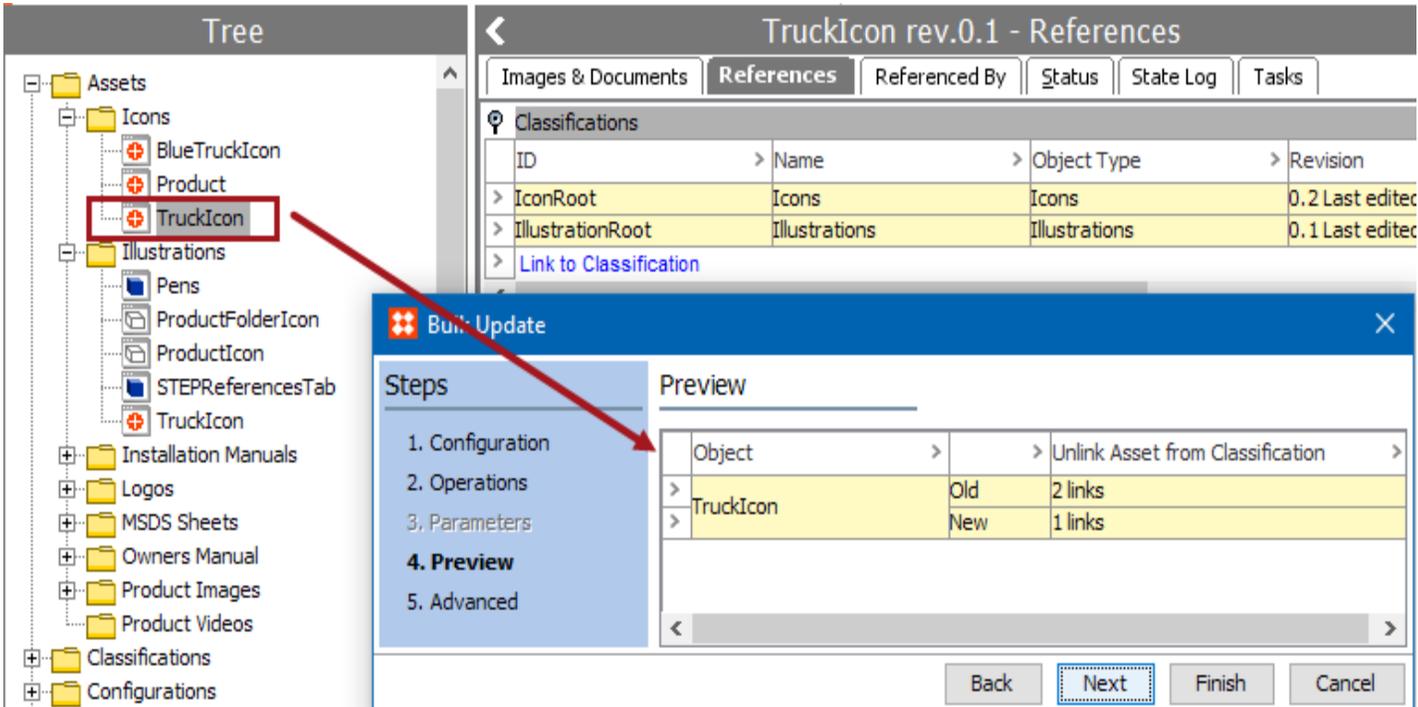
Once validity is checked, a user can choose a new Object type and a new Link Type. As seen in the example below, the items under the WebHierarchyRoot with the Website Link are now going to be of the object type 'Merchandising Hierarchy Root' with the MerchandisingLink type.



Unlink Asset from Classification

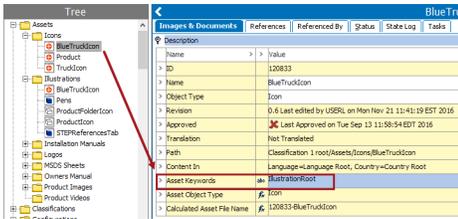
Selected assets will be unlinked from specified classification. A user needs to select the classification using the ellipsis button where the assets are to be unlinked.





This can also be done by specifying a function in the function editor by clicking the 'fx' button. For more information on how to use the function editor option, 'fx', please see the **Function Editor** topic in the **System Setup** documentation.

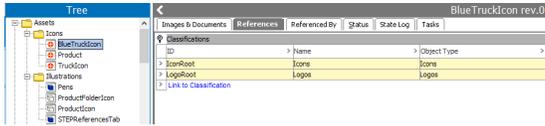
A user opens the function editor, and types in the function needed. In this example there is an attribute on the item "BlueTruckIcon" called 'Asset Keywords' that holds the ID of the Illustrations classifications folder. The user in this case no longer wants 'BlueTruckIcon' to be in the Illustrations classification folder.



If the user wishes to remove this Asset from the Illustrations folder using the 'fx' function, they would need to type in the ID of the attribute that holds the value that they want to get rid of. In this case **Prodval("Asset Keywords")**.



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

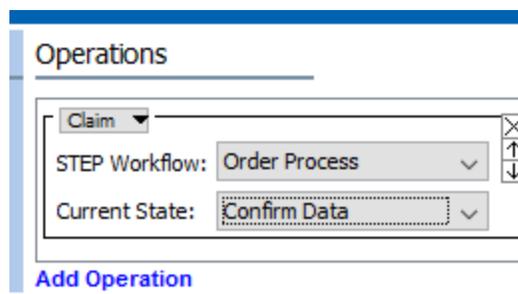


Workflow Operations for Bulk Updates

The following options are actions that take place with workflows:

Claim

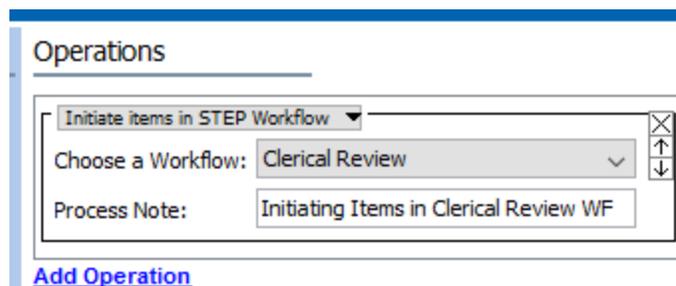
Workflow tasks are assigned to user groups where individual users in those groups can then claim the task for themselves from the group. As a user, to claim a number of tasks at once, select a workflow from the dropdown menu and then select the required state from the dropdown list.



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

Initiate items in STEP Workflows

This initiates any objects that the bulk update is performed on in the selected workflow, assuming that the objects selected are valid for the workflow. To perform this action, select a workflow from the dropdown list and enter the process note / background process note.



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

Remove items from STEP Workflow

This removes all objects from one state in a workflow. Remove objects by selecting the workflow and entering in a process note for the background process that takes place.

The screenshot shows a dialog box titled 'Operations' with a dropdown menu set to 'Remove items from STEP Workflow'. Below this, there are two fields: 'Choose a Workflow' with a dropdown menu showing 'Clerical Review', and 'Process Note' with a text box containing 'Remove all items from Clerical Review'. A blue 'Add Operation' button is located at the bottom left of the dialog.

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

Trigger STEP Workflow Event

This allows a user to move an task from one state to another state. This can be performed by selecting a workflow, selecting the desired state in the workflow, and then choosing the event that needs to be triggered. A process note can also be added.

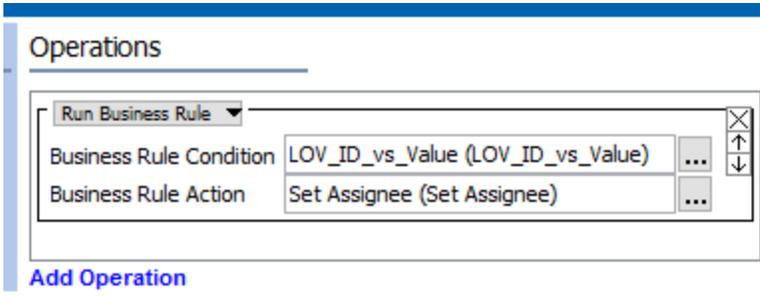
The screenshot shows a dialog box titled 'Operations' with a dropdown menu set to 'Trigger STEP Workflow Event'. Below this, there are four fields: 'STEP Workflow:' with a dropdown menu showing 'Lead Pipe Plumbing Check', 'Current State:' with a dropdown menu showing 'Lead Free', 'Event:' with a dropdown menu showing 'Approve', and 'Process Note:' with a text box containing 'All objects in Lead Free state are approved'. A blue 'Add Operation' button is located at the bottom left of the dialog.

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

Run Business Rule Operation for Bulk Updates

This runs a business rule on the selected objects. To run this business rule condition needs to be selected first, and then a business rule action needs to be selected. When the bulk update is run, it will then evaluate the business condition, and if it equates to 'true' then the selected action will take place.

Alternately, if there is not a condition that needs to be applied, this field can be left blank and only a business action needs to be selected.



Send Republish Event Operation for Bulk Updates

To perform this, a user will have to select a receiving processor to send the republished event to. It could be an Event Processor, Outbound Integration Endpoint with an event queue, or an Event Queue directly. This option is the same as selecting 'Republish' on one of the receiving processors. A republished event will then be sent to the event queue of the selected processor for all objects in the bulk update.

System Setup

- Delete LOV
- Delete Prod Ref redo
- Delete Product References
- DimDepLOV
- Downstream Data_Event-base
- Downstream Data_Object-Bas
- EmptyValues
- Event Processor
- Item Attribute Change
- LOV Definitions
- LOV Value Update On Prods

Item Attribute Change - Configuration

Background Processes | Statistics | Error Log Excerpts | Log | Status

Outbound Integration Endpoint | **Configuration** | Event Triggering Definitions

Event Actions: Forward | Rewind | Purge | Republish

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

Bulk Update

Steps

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

Operations

Send Republish Event

Receiving processor: Item Attribute Change (ItemAttributeChange)

Add Operation

System Setup

- Delete LOV
- Delete Prod Ref redo
- Delete Product References
- DimDepLOV
- Downstream Data_Event-base
- Downstream Data_Object-Bas
- EmptyValues
- Event Processor
- Item Attribute Change
- LOV Definitions
- LOV Value Update On Prods
- Matchcodeprocess
- Mongo 1
- OIEP Sample
- Outbound_GDSN
- PublicationEventOTEN

Item Attribute Change - Configuration

Background Processes | Statistics | Error Log Excerpts | Log | Status

Outbound Integration Endpoint | **Configuration** | Event Triggering Definitions

Event Queue Configuration

Event Actions: Forward | Rewind | Purge | Republish

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

Edit Configuration

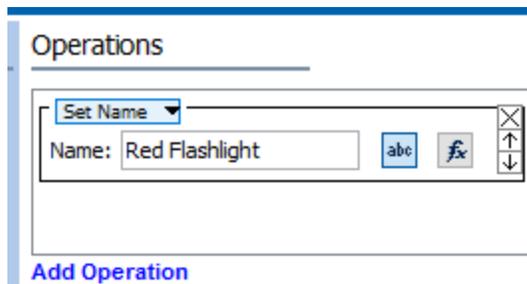
Output Templates

Object-Eventtype	> Format	> Pre-Processor	> Post-Process
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For more on republishing see the **Event-Based OIEP Forward, Rewind, Purge, and Republish** topic in the **Outbound Integration Endpoints** section of the **Data Exchange** documentation.

Set Name Operation for Bulk Updates

This 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.



See the **Using Function Editor** topic within the **Attributes** documentation for more information on writing functions.

To create a name using the editor, it is often attributes on an item that are concatenated to make the name. For example, in the image below there are two attributes that are populated that will be set to create the name of this flashlight: 'Primary Color' and 'Brand Name'.

129707 rev.0.7 - Product		
Images & Documents	Commercial	Tables
Category Profile	Proof View	Status
State Log	Tasks	
Product		
Sub Products		
References		
Name	> >	Value
ID		129708
Name		129707
Object Type		Item
Revision		0.7 Last edited by USERL on Mon Sep 12 14:59:21 EDT 2016
Approved		Never Been Approved
Translation		Not Translated
Parent		Flashlights Items
Path		Hardware Tools Task Lighting Flashlights Flashlights Items
WWW		http://www.stibosystems.com
Item Description Information		
Sales Item Marketing Descriptions		
Calculated Attributes		
Category Specific Attributes		
Name	> >	Value
Batteries Included		Yes
Primary Color		Black
Item Brand Information		
Name	> >	Value
Brand Owner		Beaming Glow Inc
Brand Name		Beaming Glow Light

By concatenating these two attributes together, it is possible to make a name for this flashlight item.

Operations

Set Name

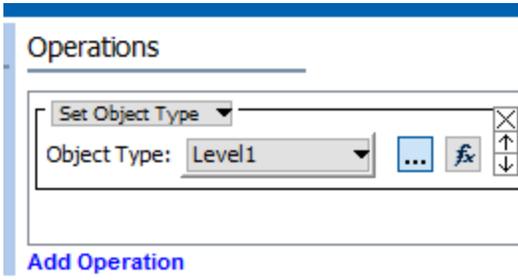
Name: Concatenate(Prodval("PrimaryColor"), " ", Prodval("BrandName"))

Add Operation

Product		
Sub Products		
References		
Rel		
Description		
Name	> >	Value
ID		129708
Name		Black Beaming Glow Light
Object Type		Item
Revision		0.7 Last edited by USERL on Mon Sep 12 15:26:17 EDT 2016

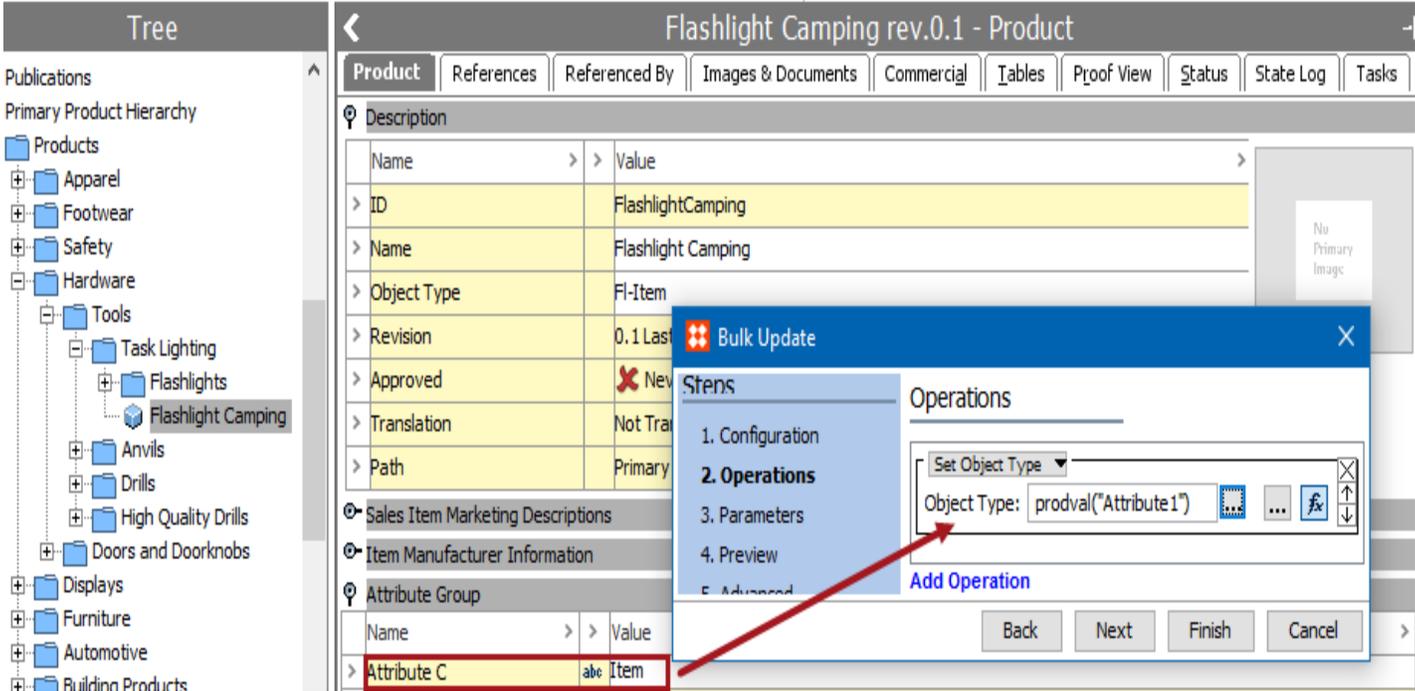
Set Object Type Operation for Bulk Updates

Changes the object type of the object on which the bulk update is run. You can select a specific object type or construct a formula expression. Selected object type should be valid under the parent of current object.

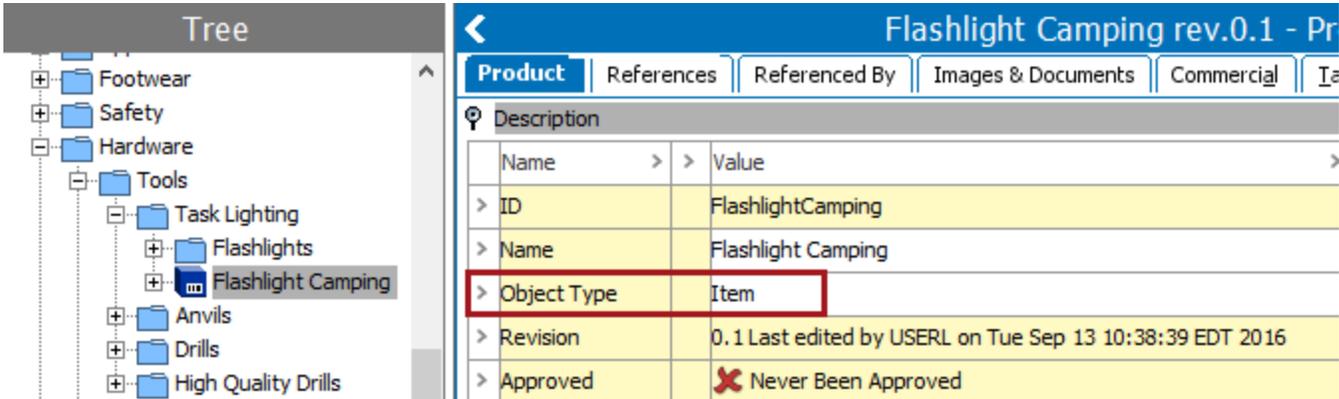


See the **Using Function Editor** topic within the **Attributes** documentation for more information on writing functions.

To set the specified object type using a formula expression, the user needs to select the 'fx' button and then click the ellipsis button to bring up the function editor. Enter in the appropriate function, and then proceed through the editor. The example below there is an attribute on the item called 'Attribute C' that holds the ID of an object type.



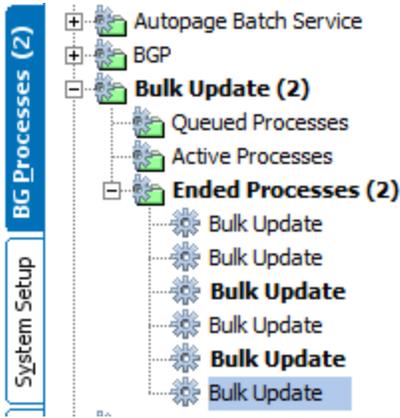
When the bulk update is run, it uses the ID in the attribute to determine what object type the item should be set to.



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 **Go to Process** to display the Background Process tab where there is additional information about the process execution.



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.

When the process has completed, the following options are available beneath the **Bulk Update Actions** flipper at the bottom of the Background Process tab.

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

Execution Report

- 1 **Bulk update background process started** (Tue Aug 23 16:48:13 EDT 2016)
- 2 Context: Context6
- 3 Workspace: Main
- 4 Commit Mode: Pre-Flight Check (rollback)
- 5 Auto Approve: No
- 6 Collection: [BGP_111871_tmp_input](#)
- 7 Configuration: temporary configuration
- 8 Read bulk update operation configuration successfully (Tue Aug 23 16:48:13 EDT 2016)
- 9 Created temporary collection: [BGP_111871_tmp_fail](#) (Tue Aug 23 16:48:13 EDT 2016)
- 10 **Applying operations to dataset** (Tue Aug 23 16:48:13 EDT 2016)
- ! 11 [(111204), operation 1]: Error: Unable to create reference of type WebsiteLink from Product (111204) to Classification Exterior
- 12 (rollback) (Tue Aug 23 16:48:13 EDT 2016)
- 13 **Summary** (Tue Aug 23 16:48:13 EDT 2016)
- 14 0 objects OK. 1 objects failed.
- 15 0 info messages. 0 warning messages. 1 Error messages.
- 16 **Operations Summary** (Tue Aug 23 16:48:13 EDT 2016)
- 17 Operation 1: [Add Reference]
- 18 Errors: 1
- 19 1: Unable to create reference
- 20 End of Summary

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1-20 of 20
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Save...

Truncate

Bulk Update Actions

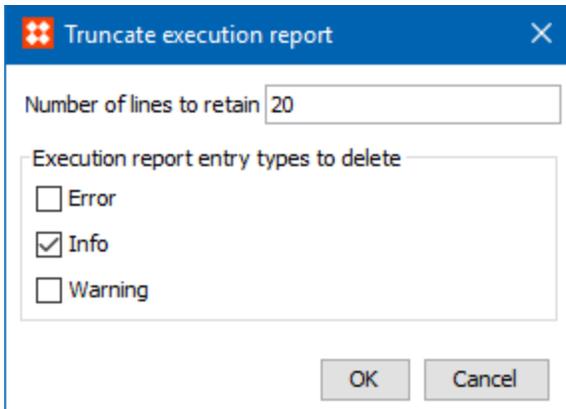
Relaunch Wizard

Bulk Update OK Objects

Save Failed Objects

Impact Report

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



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

Scheduling Bulk Updates for Collections

Scheduling a bulk update with collections can be useful for a group of objects that need to be updated on a regular basis. Additionally, should a user want to schedule a group of objects for a bulk update instead of performing it manually, they can only do so using collections. An example of this might be if a user knows that they need all current accessory references removed at a certain time on a group of objects before they are to be implemented into a workflow.

There are a few prerequisites that must take place before a collection is scheduled to run a bulk update.

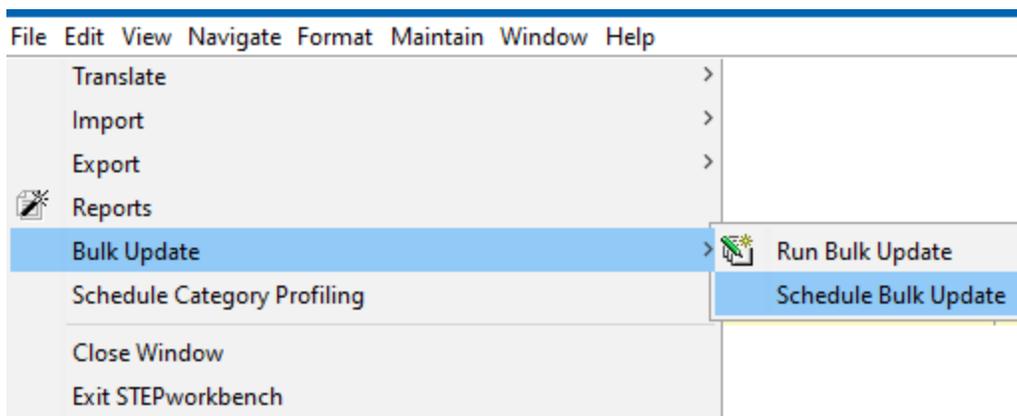
1. A collection must first be created. More on creating a collection can be found in the **Creating Collections** topic in the **Getting Started / User Guide** documentation.
2. A bulk update configuration must be created. See **Running Bulk Updates** in the **Bulk Updates** documentation for more on how to configure a bulk update.

The steps below explain how to schedule a bulk update using collections.

Scheduling Bulk Updates

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

To begin, open the Schedule Bulk Update wizard by going to File > Bulk Updates > **Schedule Bulk Updates**.

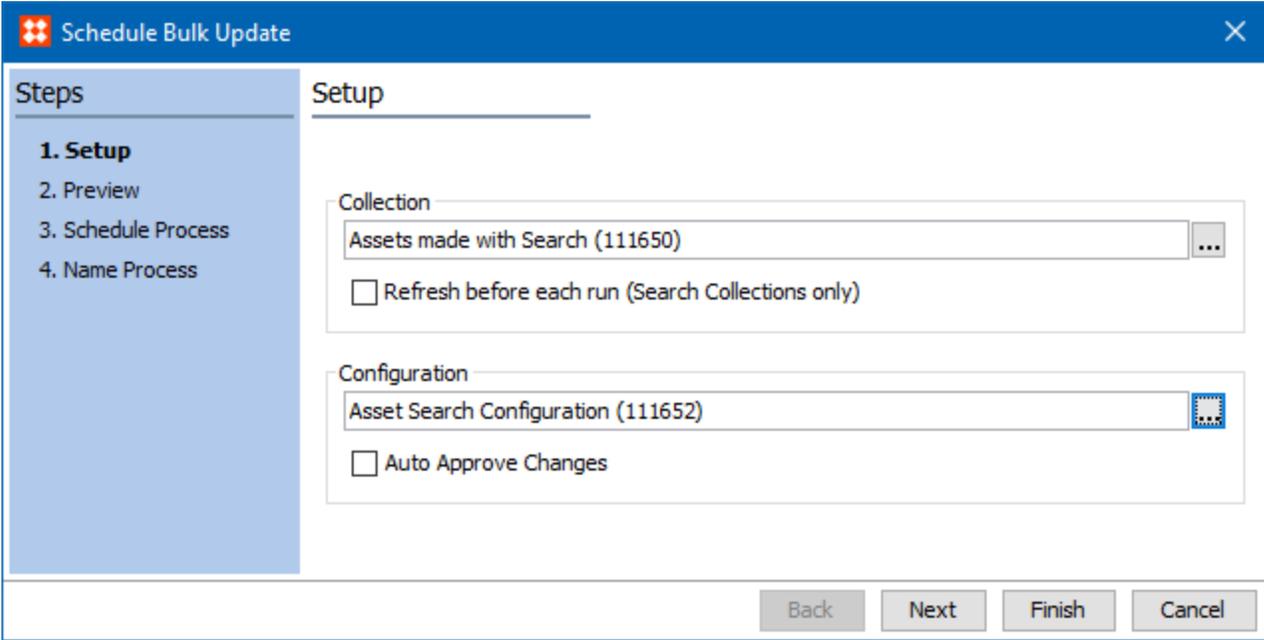


Step 1 - Setup

On the first screen, specify the collection and the configuration that is needed.

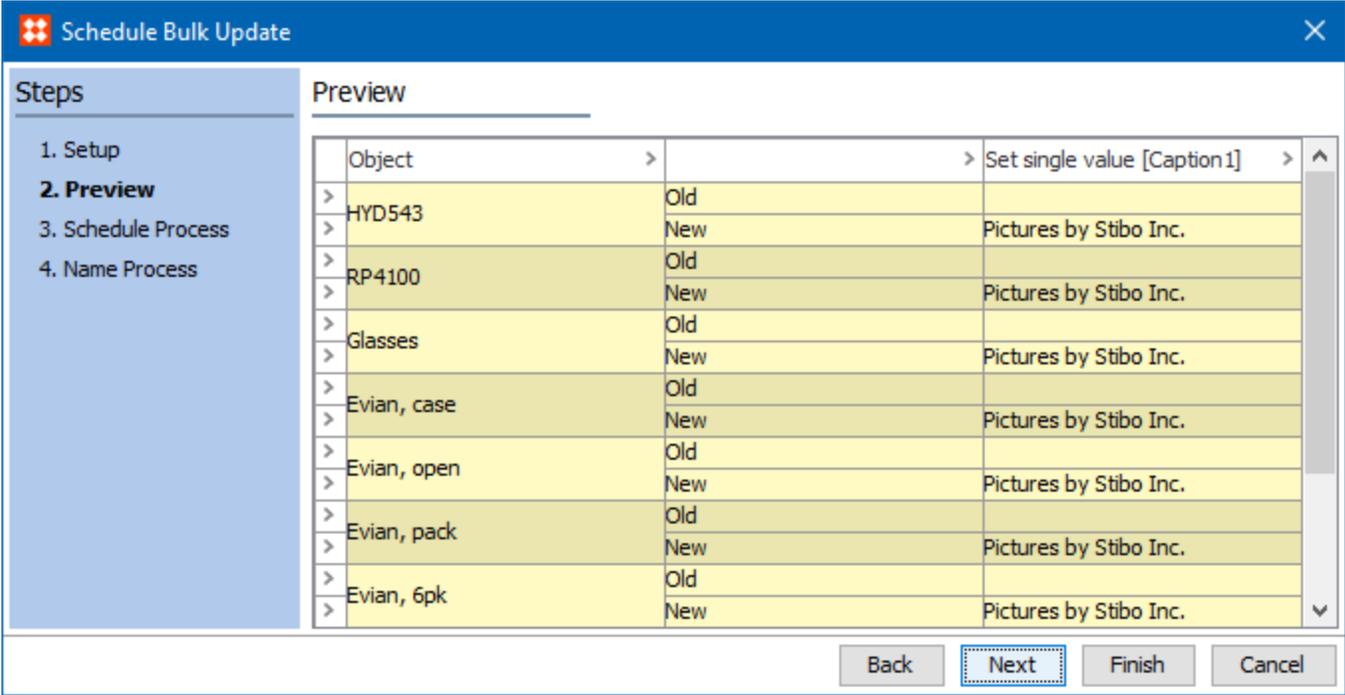
1. Click the ellipsis button (...) to locate and select the relevant collection. If the collection selected is created using the search criteria, and the **Refresh before each run (Search Collections only)** checkbox is selected, it will refresh the collection based on the current data in the STEP system using search criteria, and execute the bulk update operations. If the collection was created by going to File > Bulk Update > Run Bulk Update, then this option will not be valid.
2. Click the ellipsis button (...) to locate and select the relevant configuration.

- 3. Check **Auto approve changes** if you want to place the updated objects in the approved workspace immediately after the update.
- 4. Click **Next**.



Step 2 - Preview

This screen shows an examples of the results of the update. Click **Next** to continue.



Step 3 - Schedule Process

In Step 3, create the time schedule. Select either **Now**, **Later**, **Weekly** or **Monthly**. The available options depend on user selection. Select the options needed, and then click **Next**.

Schedule Bulk Update

Steps

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

Schedule Process

Start

Now Start at (hh:mm): 11:04

Later Start on (yyyy-mm-dd): 2016-08-19

Weekly End on (yyyy-mm-dd): -

Monthly

Later and repeat

Every: Mon Sat
 Tue Sun
 Wed
 Thu
 Fri

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

Back Next Finish Cancel

Step 4 - Name Process

In the final step, enter a name for the **Schedule Process** and for the **Process**. Click **Finish** to complete the wizard.

The screenshot shows a software dialog box titled "Schedule Bulk Update" with a close button (X) in the top right corner. On the left side, there is a "Steps" sidebar with a list: "1. Setup", "2. Preview", "3. Schedule Process", and "4. Name Process" (which is highlighted in bold). The main area of the dialog 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 right, there are four buttons: "Back", "Next", "Finish" (which is highlighted with a dashed border), and "Cancel".

Upon hitting **Finish**, it will give the user an option of going to the background process. If selected it will take the user to the background process tab and display the background process.

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

Background Process

🔍 Properties

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

🔍 Execution Report

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

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If the bulk update is scheduled, then it will show under 'Queued process'.

BG Processes

- STEP Workflow Profiling
- Scheduled Processes
 - Queued Processes
 - Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19)**
 - Active Processes
 - Ended Processes