

USER GUIDE

Bulk Updates

Release 9.3-MP3 (April 2020)

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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:

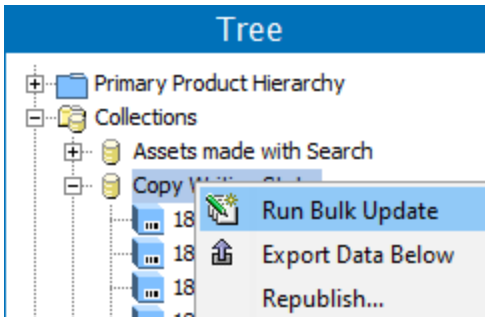
1. Monitor a bulk update through a background process as described in **Monitoring Bulk Updates**.
2. Schedule a bulk update as described in **Scheduling Bulk Updates for Collections**.

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:

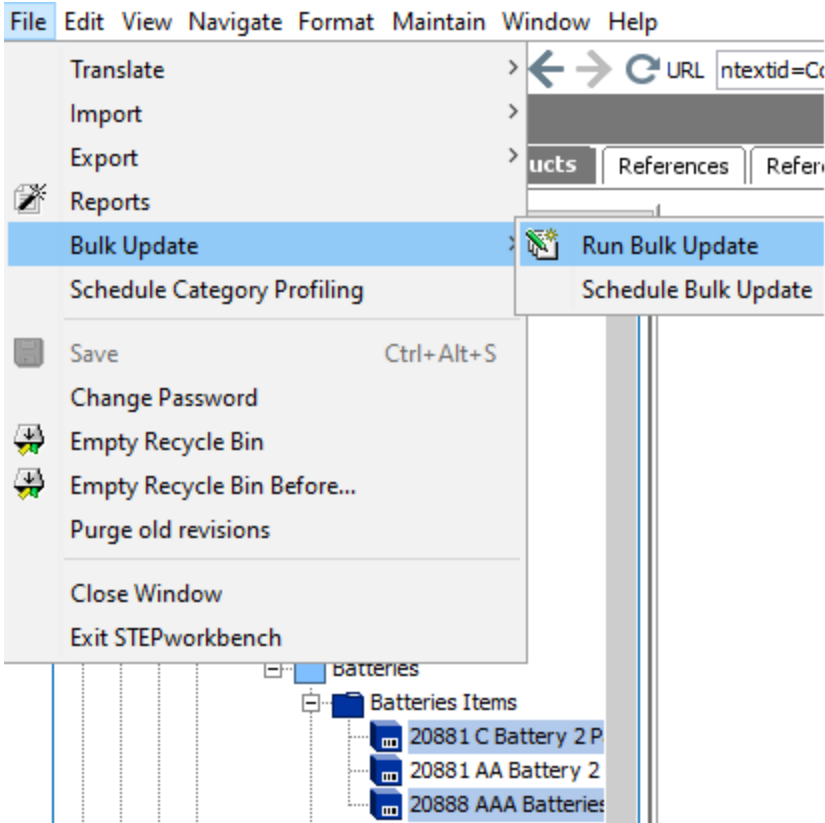
1. Determine the data that should be updated.
2. Use one of the following methods to select data to be updated and launch the Bulk Update wizard.
 - **Run on all objects in a single collection or multiple collections:** In Tree, select one or more collections, right-click and choose **Run Bulk Update**.




- **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**.

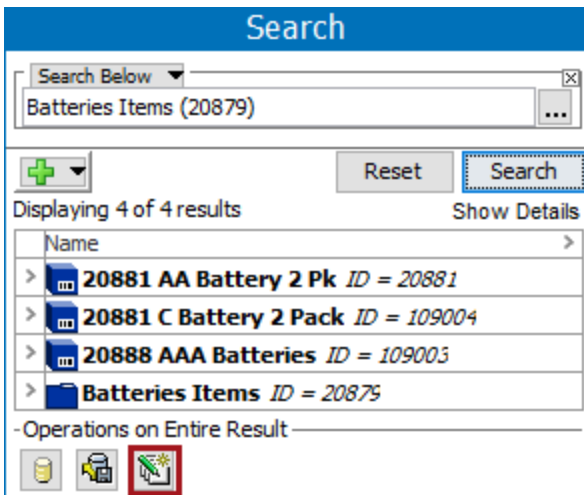
Note: To run a saved bulk update configuration (which loads the operations and settings) first start the wizard, and then choose the existing configuration on the Configuration step shown below.

Tree Objects	System Setup Objects	
<ul style="list-style-type: none"> • Assets • Classifications • Collections • Configurations • eCatalogs • Entities • Index Words • Products • Publication groups • Publication object sections • DTP documents in the publication hierarchy 	<ul style="list-style-type: none"> • 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 	<ul style="list-style-type: none"> • 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

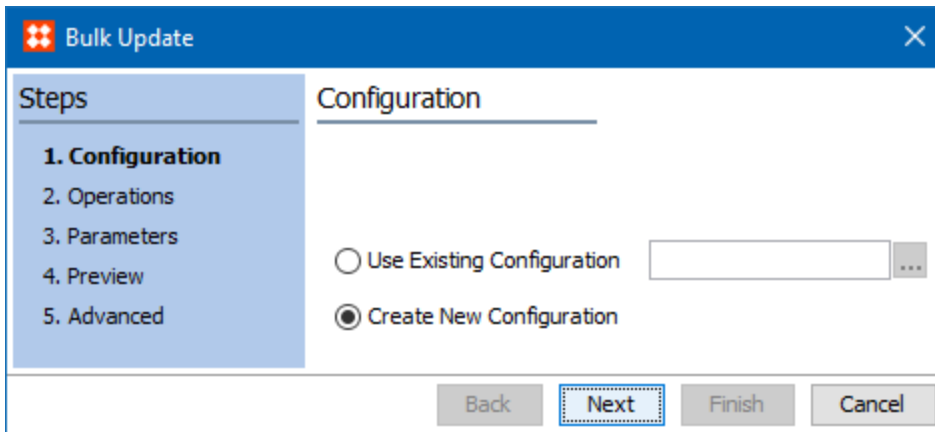


- **Run on search results:** Perform a search, and click the **Bulk Update** button ()

For more on the Search tab in workbench, see the **Search** topic in the **Getting Started / User Guide** documentation.



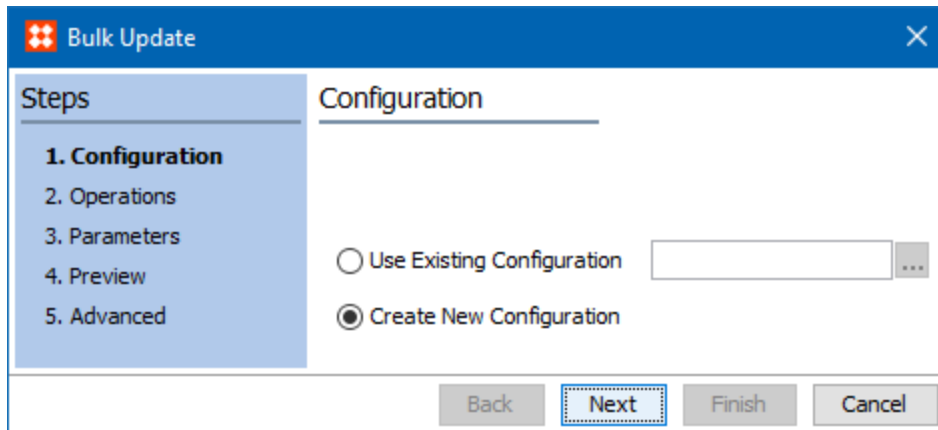
3. The Bulk Update wizard displays and can involve the following steps:



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

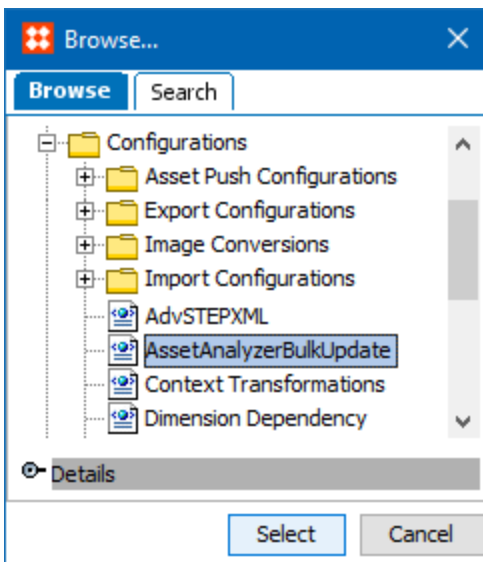
Bulk Update Configuration

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



1. Choose the option for the desired configuration:

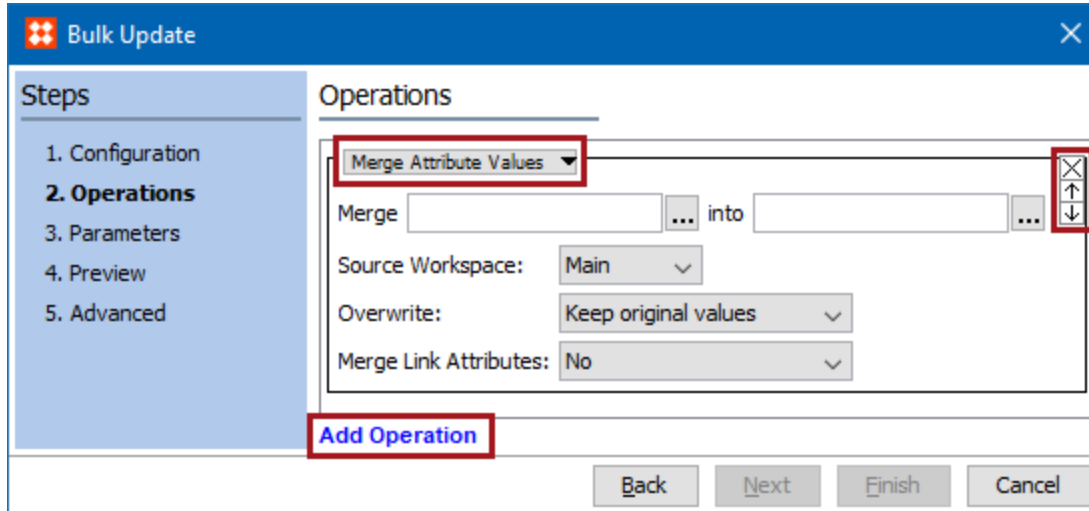
- Click the 'Use Existing Configuration' radio button to use a saved bulk update configuration, then click the ellipsis button (...) to display the configuration selection dialog. Use the Browse or Search tab to select the relevant configuration and click the **Select** button.



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

Bulk Update Operations

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



1. Add or edit the required operations as follows:

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

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

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

Attribute Values: 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, see 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, see the **Merging Attribute Values** section of the **System Setup / Super User Guide**.

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

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

Prerequisites

Before using this operation:

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

Configuration

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

The screenshot shows the 'Merge Attribute Values' configuration dialog. At the top, a dropdown menu is set to 'Merge Attribute Values'. Below this, the 'Merge' field contains 'T-shirt Size (TshirtSize)' and the 'into' field contains 'Size (Size)'. Both fields have ellipsis buttons to the right. The 'Source Workspace' is set to 'Main'. The 'Overwrite' dropdown is set to 'Keep original values'. The 'Merge Link Attributes' dropdown is set to 'No'. There are also up and down arrow buttons on the right side of the dialog.

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

5. For the **Overwrite** parameter, use the dropdown to select one of the following options. Validation errors are displayed when a value cannot be modified. See 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.

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

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

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

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

Preview

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

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

Preview

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

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

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)]
	New	[18212(48)]
T-shirt, case (L O)	Old	
	New	[181951(24)]
T-shirt, case (M B)	Old	[18210(36)]
	New	[18210(36)]
T-shirt, case (M O)	Old	
	New	

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

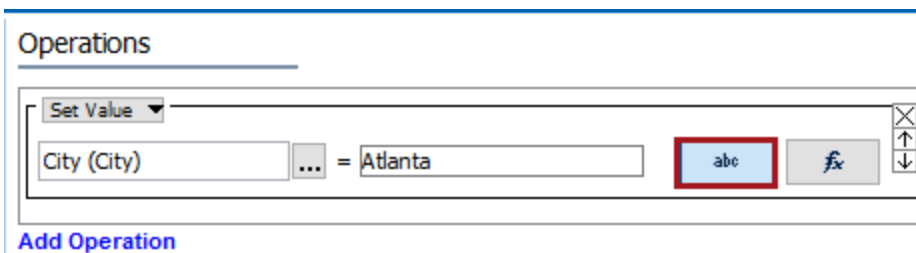
This operation is similar to one in the business rules functionality, as described in the **Business Action: Set Attribute Value** topic in the **Business Rules** documentation.

Configuration

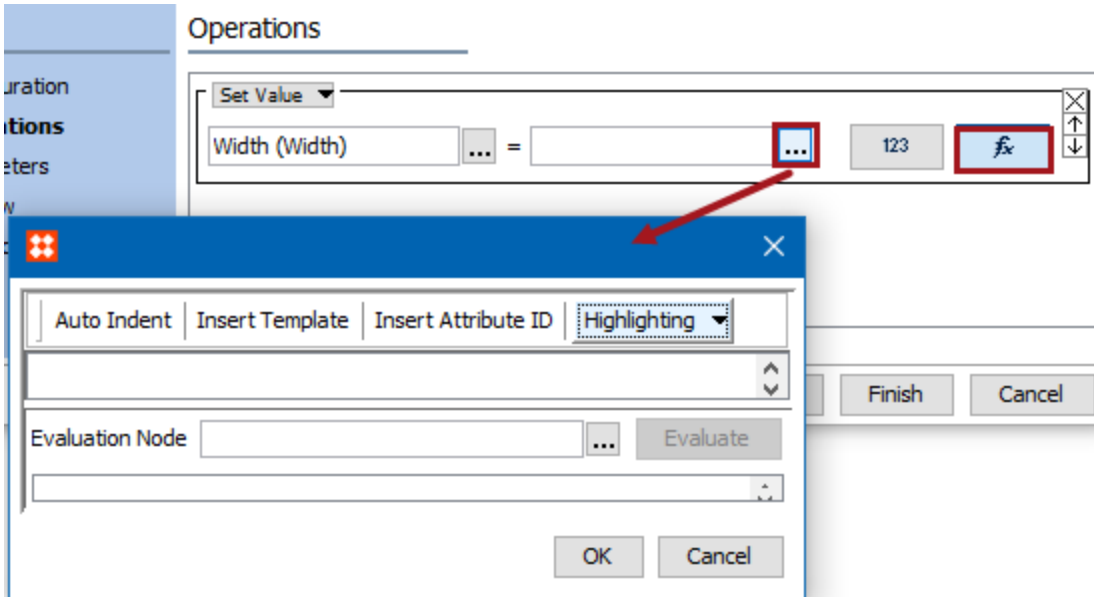
1. Select **Set Value** from the dropdown.
2. For the first parameter, click the manual (abc) button or the function (fx) button and then click the ellipsis button (...).

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

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



- 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**. See the **Using Function Editor** topic within the **Resource Materials** online help for more information on writing functions.
3. For the second parameter (=), click the manual (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**. See the **Using Function Editor** topic within the **Resource Materials** online help for more information on writing functions.



Data Containers: Update Data Containers Operation

This operation is available for Data Containers. For more information on Data Containers, see the **Data Containers** topic in the **System Setup / Super User Guide** 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, see the **Creating a Bulk Update** topic.

Configuration

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

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

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

Data Quality: Generate Match Codes Operation

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

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

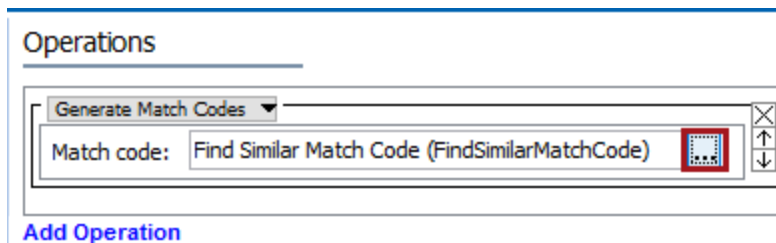
This operation can also be run via the business rules functionality, as described in the **Business Action: Generate Match Codes** topic in the **Business Rules** documentation.

Prerequisites

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

Configuration

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



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

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

Data Quality: Match Duplicates Operation

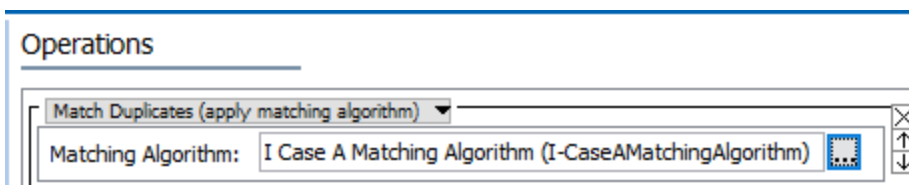
DEPRECATED. Instead, use 'Send Republish Event' to Event Processor configured to apply matching using user's matching algorithm, as defined in the **Send Republish Event Operation** topic.

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

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

Configuration

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



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

Data Quality: Standardize Address Operation

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

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

For more information on the Bulk Update wizard, see 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, 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.

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

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

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

Address Standardization Modes Parameter

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

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

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

Tree	3550 George Busbee Pkwy rev.0.11 - Address	
	Address	References
(ADD_192264)		
(ADD_192265)		
(ADD_192269)		
(ADD_192272)		
(ADD_215171)		
3550 George Busbee Pkwy		
ADD_BLANK		
	State	abc GA
	Street	abc 3550 George Busbee Pkwy NW
	Validation Hash	abc -1618871087
		Loqate/-1618871087/<?xml version="1.0" encod <qt>

- **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): 160 Days

Turn on CASS validation for US addresses:

CASS Certification Report Event Processor: []

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

Tree

- (ADD_192268)
- (ADD_192269)
- (ADD_192272)
- (ADD_215171)
- 3550 George Busbee Pkwy
- ADD_BLANK

3550 George Busbee Pkwy rev.0.11 -

Address	References	Referenced By	Matching
> Validation Time	abc	2017-06-09 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 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: 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.

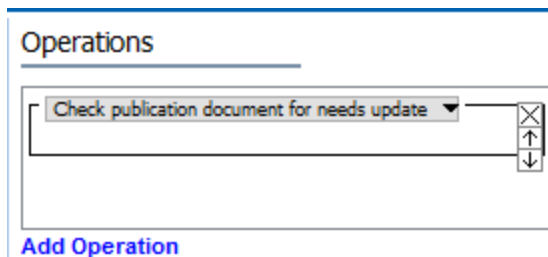
Checking documents for updates from within STEP Workbench is primarily useful for AutoPage and Flatplanner publications. Since near-identical functionality can be accessed from other locations in the workbench (including right-clicking on a publication or section object in the Tree and clicking 'Check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

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

Configuration

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



2. No parameter configuration is required.

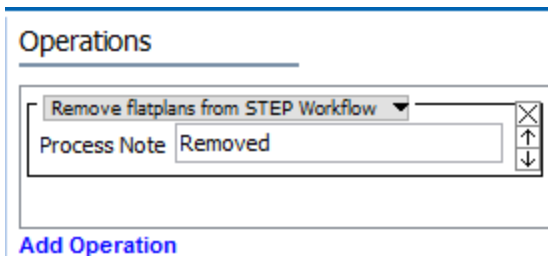
Publishing: Remove Flatplans from STEP Workflow Operation

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

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

Configuration

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



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

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

Publishing: Start Flatplans in STEP Workflow Operation

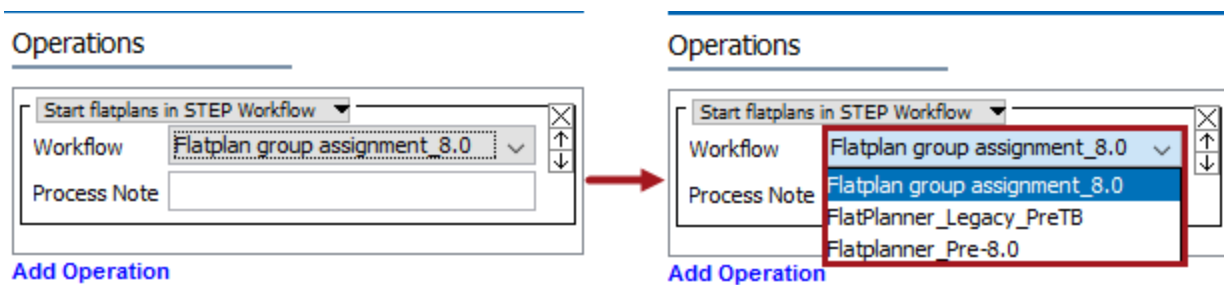
This operation adds all Flatplanner spreads (planned pages) in the selected publication group, publication, or section into the specified Flatplanner workflow. The bulk update is initiated by right-clicking on the desired publication group, publication, or section. A selection of planned pages can also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

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

Configuration

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

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



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

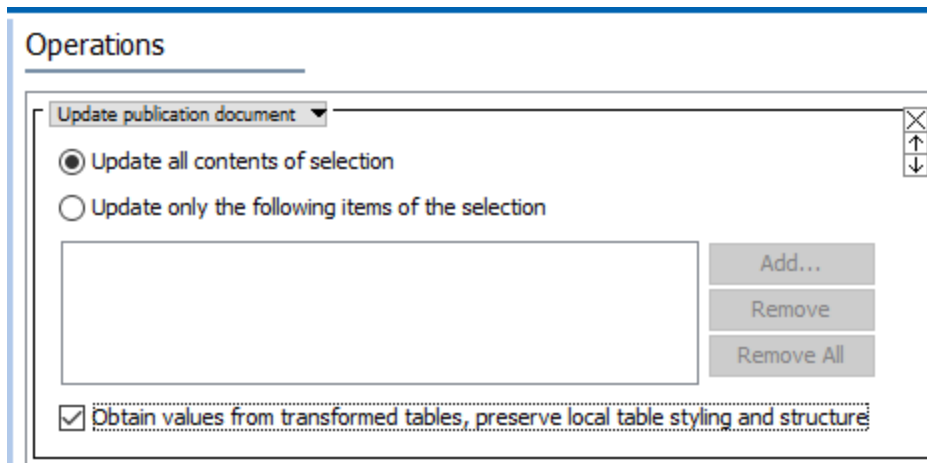
Publishing: Update Publication Document Operation

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

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

Configuration

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



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

References and Links: Add Attribute Link Operation

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

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

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

For more information on the Bulk Update wizard, see 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.

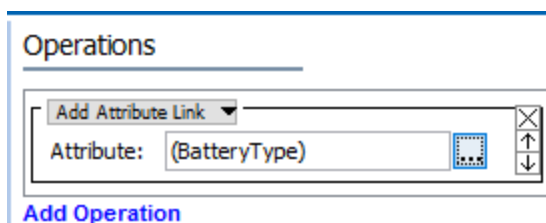
Prerequisites

Before using this operation:

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

Configuration

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



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

Example

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

Tree

- Primary Product Hierarchy
 - Products
 - Apparel
 - Footwear
 - Safety
 - Hardware
 - Tools
 - Task Lighting
 - Flashlights
 - Flashlights Items
 - (111204)
 - 20862
 - 20883

Flashlights Items rev.0.5 - References

Images & Documents | Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Product Variants | Sub Products | **References** | Referenced By

> Add Index Word

Publications

ID > Name >

> Link to Publication or Section

Linked Attributes from Product Hierarchy

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



Tree

- Primary Product Hierarchy
 - Products
 - Apparel
 - Footwear
 - Safety
 - Hardware
 - Tools
 - Task Lighting
 - Flashlights
 - Flashlights Items
 - (111204)
 - 20862
 - 20883

Flashlights Items rev.0.5 - References

Images & Documents | Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Product Variants | Sub Products | **References** | Referenced By

> Add Index Word

Publications

ID > Name >

> Link to Publication or Section

Linked Attributes from Product Hierarchy

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

References and Links: Add Reference or Add Referenced By Operations

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

For more information on the Bulk Update wizard, see 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, see the **Reference and Link Types** topic in the **System Setup / Super User Guide** documentation.

Configuration

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

Operations

Add Reference

Type: Supplier Link (SupplierLink) ...

Target: Products (ProductsGaloreProducts) ... abc f

Add Operation

Operations

Add Referenced By

Type: Supplier Link (SupplierLink) ...

Source: B&D Display Rack (22208) ... abc f

Add Operation

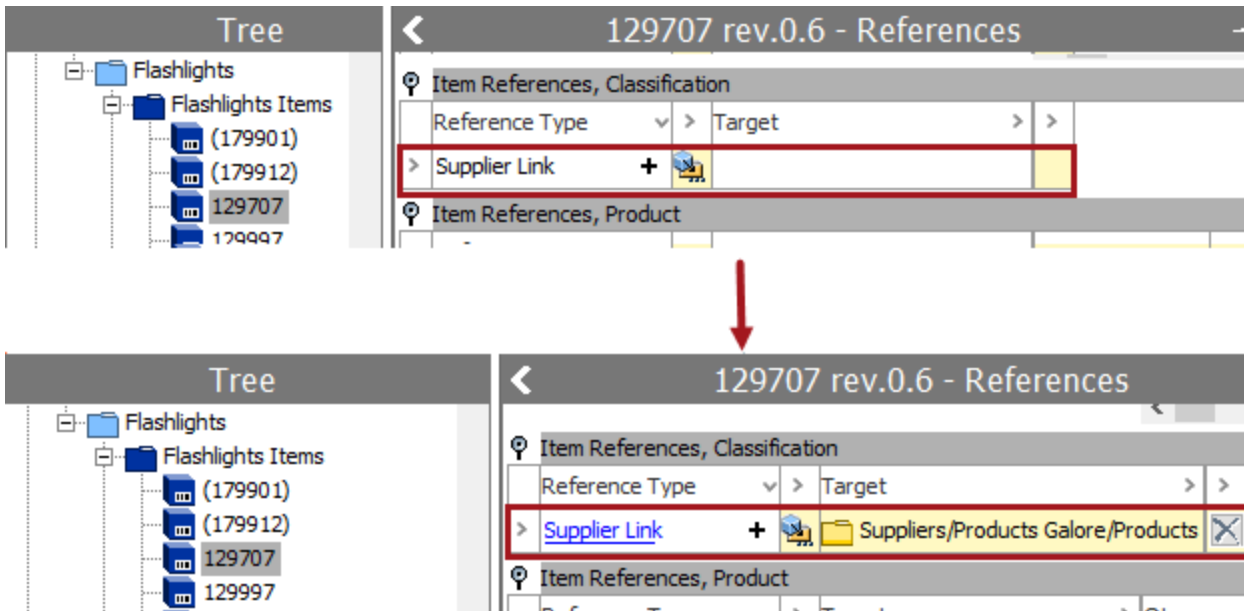
2. For the **Type** parameter, click the ellipsis button (...), select the reference type, and click **Select**.
3. For the **Target** or **Source** parameter, use one of these methods to select the relevant target or source.

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

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

Examples

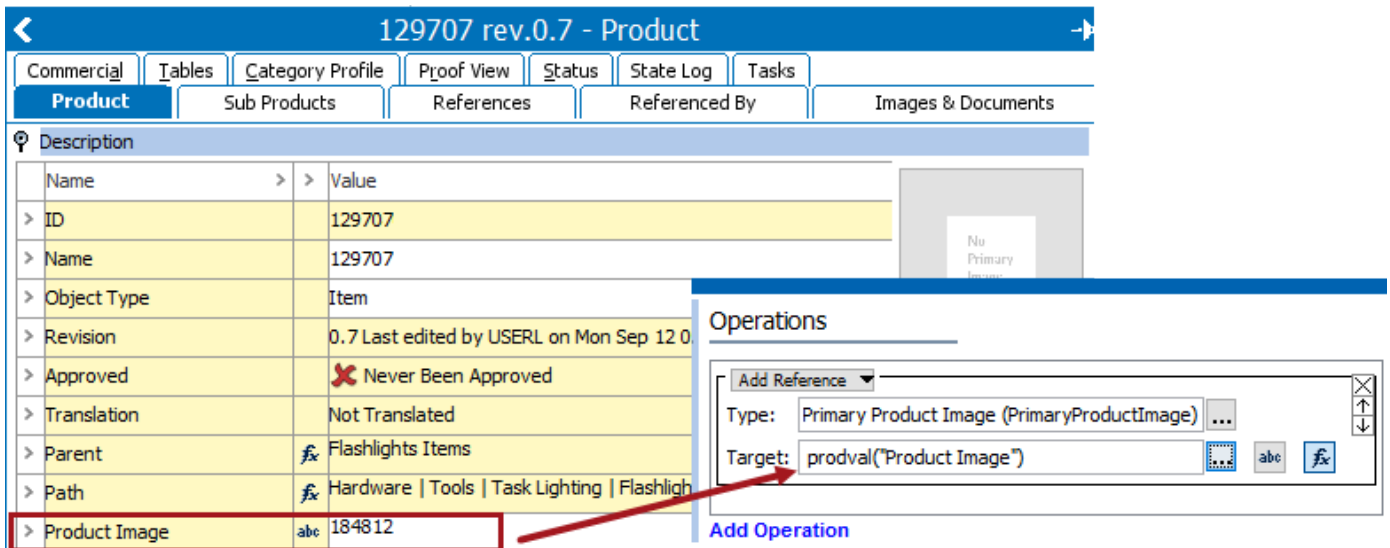
An example using **Add Reference** is below:



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

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

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



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

Tree

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

← 129707 rev.0.7 - References →

Category Profile
Proof View
Status
State Log
Tasks

Referred By	Images & Documents	Commercial	Tables
Product	Sub Products	References	

Image References

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

References and Links: Automatic Classification Operation

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

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

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

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

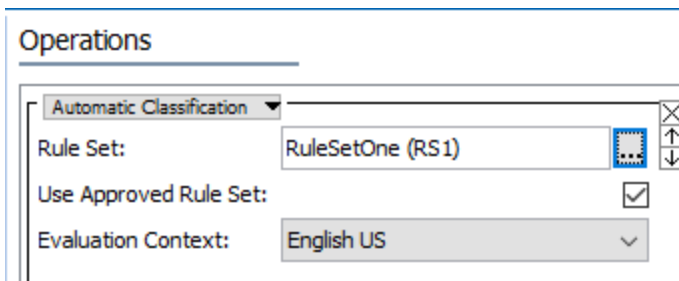
Prerequisites

Before using this operation:

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

Configuration

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



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

References and Links: Industry Classification Synchronization Operation

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

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

Configuration

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

Operations

Industry Classification Synchronization ▼

Industry standard matcher: eClass

Source classification root: eClass 9.1 (eClass_9.1) ...

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

Product to classification link type: eClassSEG (eClassSEG) ...

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

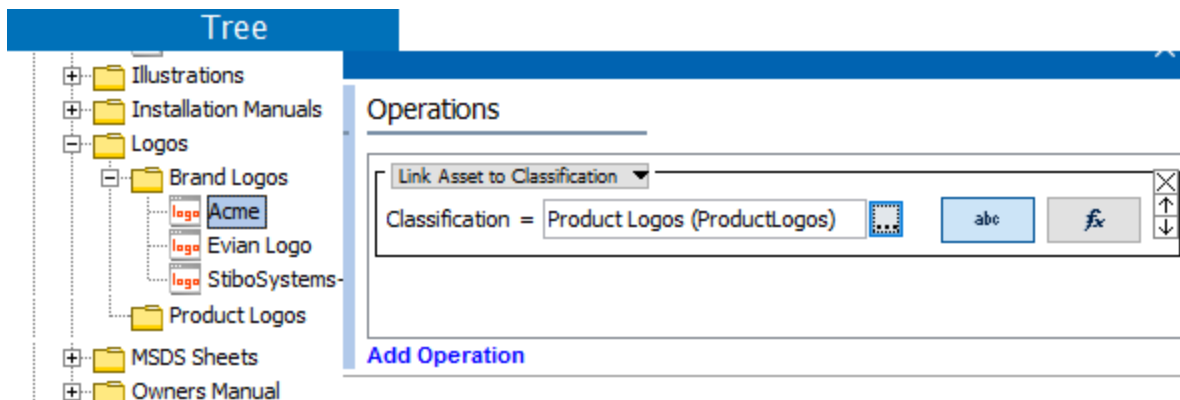
References and Links: Link Asset to Classification Operation

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

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

Configuration

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

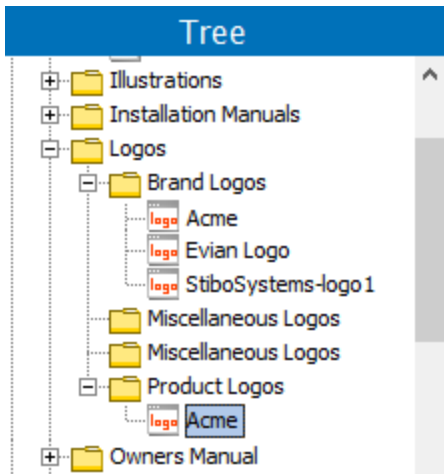


3. In the **Classification** parameter, use one of these methods to select the relevant classification.

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

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

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



References and Links: Remove Attribute Link Operation

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

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

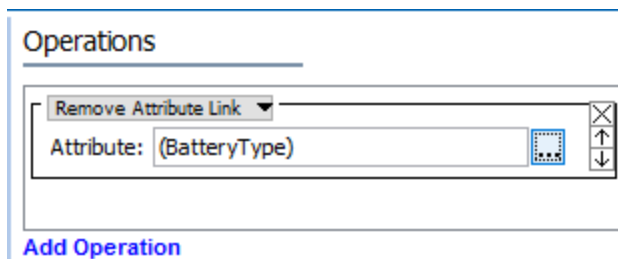
This operation can also be run via the business rules functionality, as described in the **Business Action: Remove Attribute Link** topic in the **Business Rules** documentation.

Prerequisite

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

Configuration

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



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

Example

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

Tree

- Primary Product Hierarchy
 - Products
 - Apparel
 - Footwear
 - Safety
 - Hardware
 - Tools
 - Task Lighting
 - Flashlights
 - Flashlights Items
 - (111204)
 - 20862
 - 20883

Flashlights Items rev.0.5 - References

Images & Documents | Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Product Variants | Sub Products | **References** | Referenced By

> Add Index Word

Publications

ID > Name >

> Link to Publication or Section

Linked Attributes from Product Hierarchy

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



Tree

- Primary Product Hierarchy
 - Products
 - Apparel
 - Footwear
 - Safety
 - Hardware
 - Tools
 - Task Lighting
 - Flashlights
 - Flashlights Items
 - (111204)
 - 20862
 - 20883

Flashlights Items rev.0.5 - References

Images & Documents | Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Product Variants | Sub Products | **References** | Referenced By

> Add Index Word

Publications

ID > Name >

> Link to Publication or Section

Linked Attributes from Product Hierarchy

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

References and Links: Remove Reference Operation

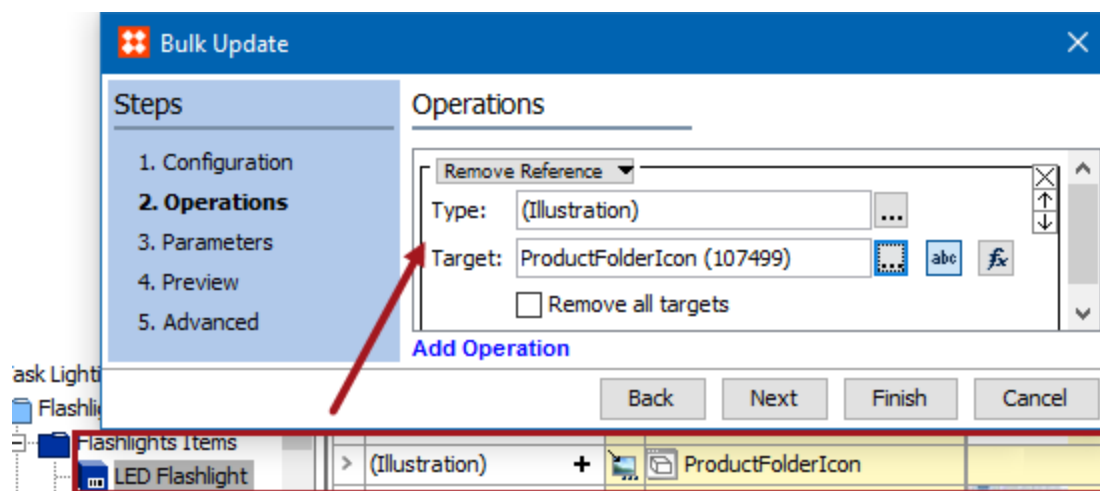
This operation removes references to a specific target or all references of a specific type.

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

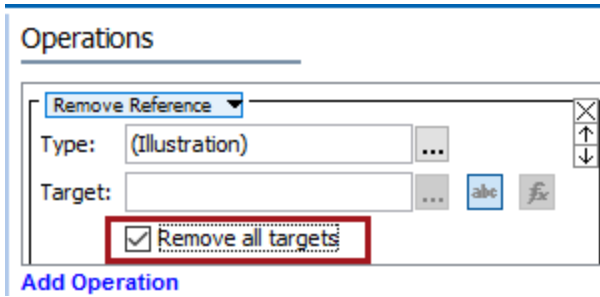
This operation can also be run via the business rules functionality, as described in the **Business Action: Remove Reference** topic in the **Business Rules** documentation.

Configuration

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



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



Example

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

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 Toc
Product Image	abc 184812

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

Tree


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

129707 rev.0.7 - References

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

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

Image References

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

Tree

- Ware
- Tools
 - Task Lighting
 - Flashlights
 - Flashlights Items
 - (179901)
 - (179912)
 - 129707**
 - 129997
 - 130000

129707 rev.0.7 - References

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

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

Image References

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

References and Links: Set Product to Classification Link Type Operation

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

For more information on the Bulk Update wizard, see 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, see the **Reference and Link Types** topic in the **System Setup / Super User Guide** documentation.
2. Ensure a valid classification object type should be linked to the same parent classification of the object type being changed to.
3. Classification Link Type should have the object type valid.

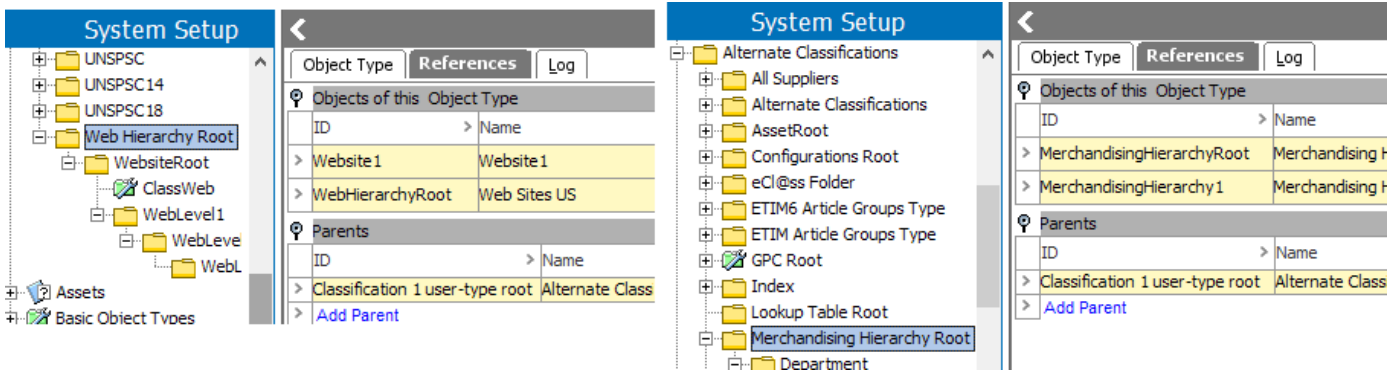
Configuration

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

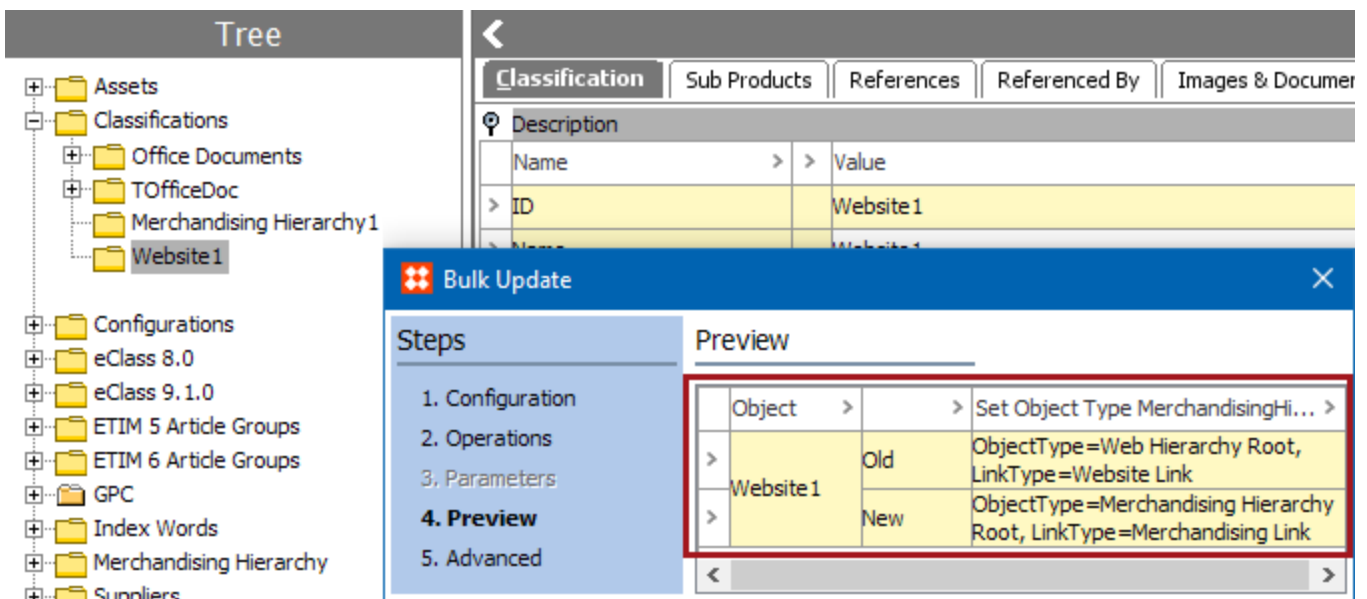
2. In the **New Object Type** parameter, click the ellipsis button (...) to display the Select Object Type dialog, select the classification, and click the **Select** button.
3. In the **New Link Type** parameter, click the ellipsis button (...) to display the Select Product to Classification Link Type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

Example

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



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.



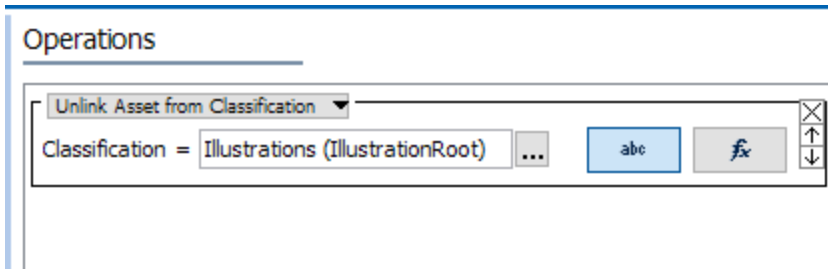
References and Links: Unlink Asset from Classification Operation

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

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

Configuration

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



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

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

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

Examples

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

The screenshot shows the 'Tree' view on the left with 'TruckIcon' highlighted. The 'References' window on the right shows a table of classifications:

ID	Name	Object Type	Revision
> IconRoot	Icons	Icons	0.2 Last edited
> IllustrationRoot	Illustrations	Illustrations	0.1 Last edited
Link to Classification			

The 'Bulk Update' dialog is open, showing the following 'Preview' table:

Object	Old	New	Unlink Asset from Classification
> TruckIcon	2 links	1 links	

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 'Tree' view on the left with 'BlueTruckIcon' highlighted. The 'Description' window on the right shows the following attributes:

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

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

Operations

Unlink Asset from Classification

Classification = ...

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

Tree

- Assets
 - Icons
 - BlueTruckIcon
 - Product
 - TruckIcon
 - Illustrations
 - Pens
 - ProductFolderIcon
 - ProductIcon
 - STEPReferencesTab

BlueTruckIcon rev.0.

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

Classifications

ID	Name	Object Type
> IconRoot	Icons	Icons
> LogoRoot	Logos	Logos

> [Link to Classification](#)

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, see the **Creating a Bulk Update** topic.

Configuration

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

The screenshot shows a configuration window titled "Operations". At the top, there is a dropdown menu with "Run Business Rule" selected. Below this, there are two rows of configuration fields:

Business Rule Condition	LOV_ID_vs_Value (LOV_ID_vs_Value)	...
Business Rule Action	Set Assignee (Set Assignee)	...

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

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

Send Republish Event Operation

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

For more on republishing, see the **Event-Based OIEP Forward, Rewind, Purge, and Republish** topic in the **Outbound Integration Endpoints** section of the **Data Exchange** documentation.

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

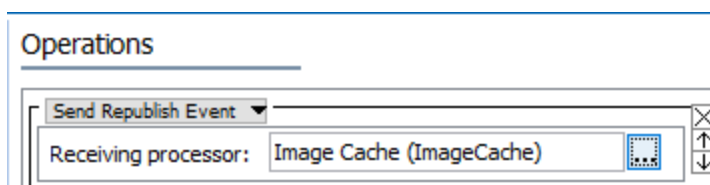
This operation can also be run via the business rules functionality, as described in the **Business Action: Send Republish Event** topic in the **Business Rules** documentation.

Prerequisite

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

Configuration

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



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

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

Example

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

System Setup

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

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

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

Set Name Operation

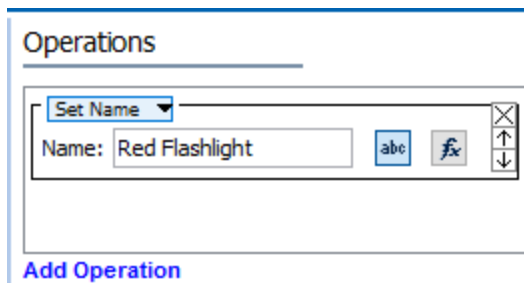
This operation sets the name of the object on which the bulk update is run. A user can either enter the name manually, or specify a function in the Function editor for naming the object.

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

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

Configuration

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



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

Example

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

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

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

Operations

Set Name

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

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

Set Object Type Operation

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

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

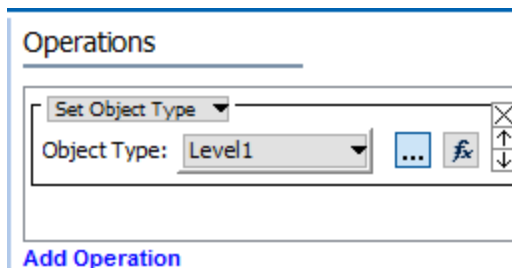
This operation can also be run via the business rules functionality, as described in the **Business Action: Set Object Type** topic in the **Business Rules** documentation.

Prerequisite

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

Configuration

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



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

Example

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

Flashlight Camping rev.0.1 - Product

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

Description

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

Bulk Update Dialog:

Steps:

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

Operations:

Set Object Type:

Object Type: prodval("Attribute1")

Attribute Group Table:

Name	Value
Attribute C	abc Item

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

Flashlight Camping rev.0.1 - Product

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

Description

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

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 see the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

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

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

Configuration

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

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

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 see the **Bulk Update Operations for Workflows** topic in the **Workflows** documentation.

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

Prerequisite

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

Configuration

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

Operations

Initiate items in STEP Workflow

Choose a Workflow: Clerical Review

Process Note: Initiating Items in Clerical Review WF

[Add Operation](#)

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: 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, see the **Remove Objects From Workflows** topic in the **Workflows** documentation.

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

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

Configuration

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

The screenshot shows a configuration window titled "Operations". At the top, there is a dropdown menu currently displaying "Remove items from STEP Workflow". Below this, there are two rows of configuration options. The first row is labeled "Choose a Workflow" and has a dropdown menu showing "Clerical Review". The second row is labeled "Process Note" and has a text input field containing "Remove all items from Clerical Review". To the right of these options are vertical arrows for navigation and a close button (X). At the bottom left of the window, there is a blue button labeled "Add Operation".

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, see the **Creating a Bulk Update** topic.

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

Prerequisites

Before using this operation:

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

Configuration

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

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

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

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

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

Bulk Update Parameters

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

For more information, see the **Parameterized Business Actions in Web UI** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Bulk Update

Steps

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

Parameters

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

Parameters templates

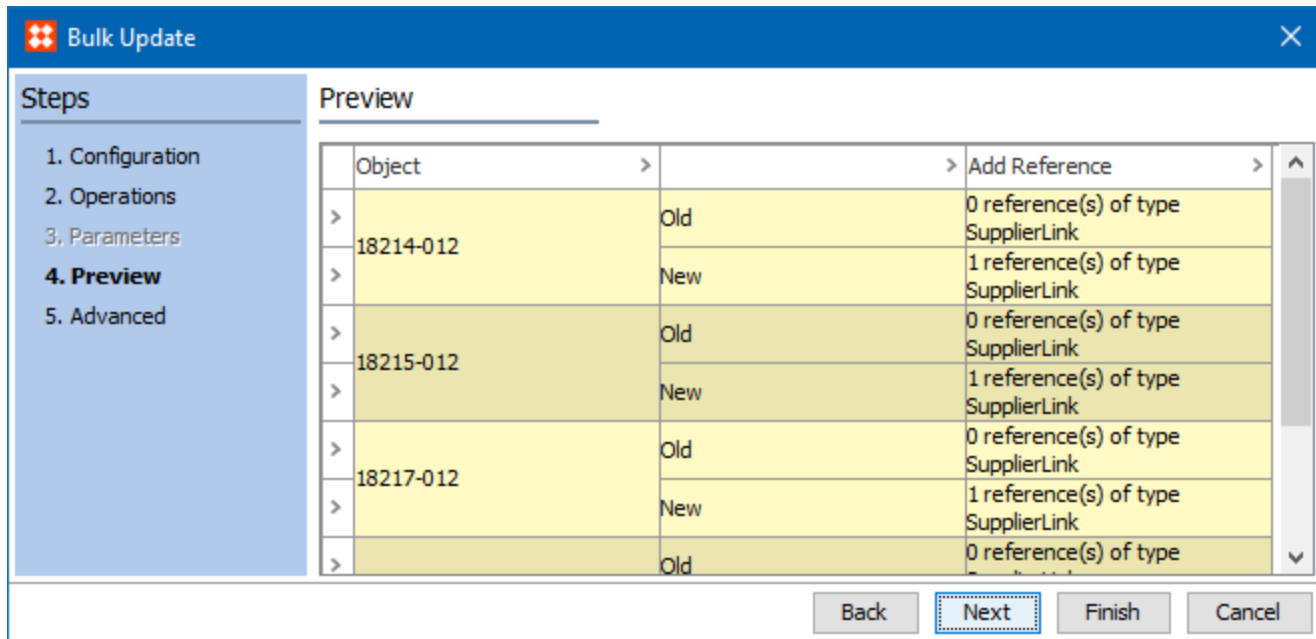
ID : attr_lov	Type : Color	Title : <input type="text"/>
ID : attr_num	Type : Lead Time	Title : <input type="text"/>

Back Next Finish **Cancel**

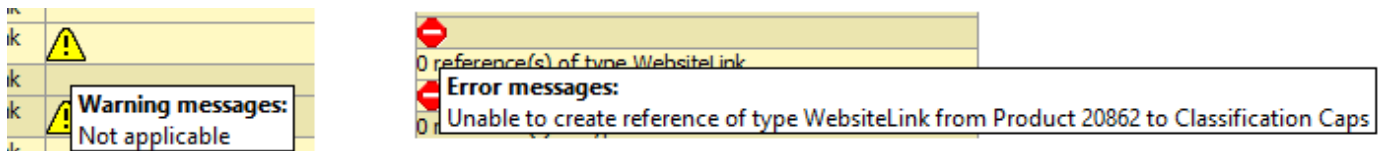
1. If the Parameters step is enabled, supply the necessary data.
2. Click the **Next** button to display the **Bulk Update Preview** step.

Bulk Update Preview

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



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 **Bulk Update Advanced** step.

Bulk Update Advanced

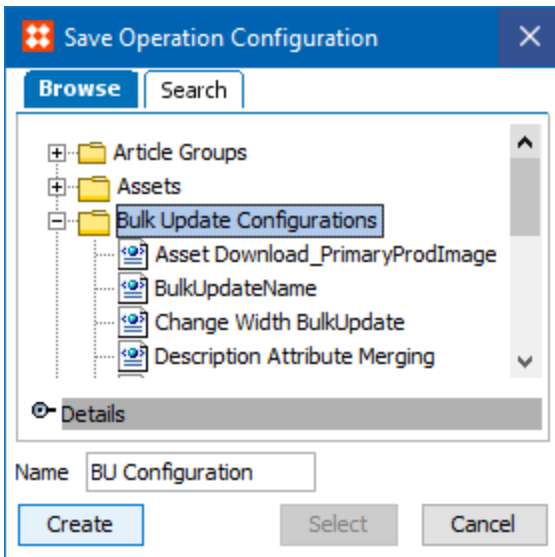
In the final step, select one or more of the available options.

1. Set the following parameters as necessary:

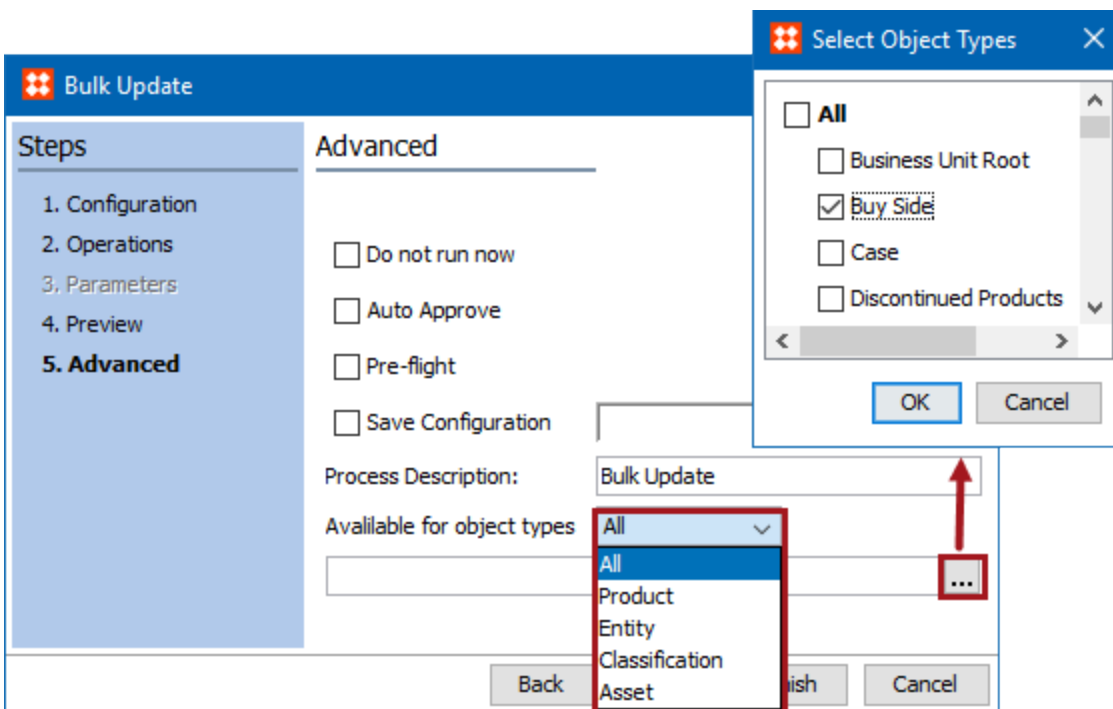
- **Do not run now** runs the bulk update later, and not immediately when the wizard is finished. This allows a user to save the configuration. When checked, the **Auto Approve** and **Pre-flight** parameters are disabled.
- **Auto Approve** approves the updated objects once the update succeeds. The objects are displayed in the approved workspace.
- **Pre-flight** performs a test run of the update. When the user clicks 'Finish', the test runs in a background process. Selected operations are applied and then rolled back. An execution report and an impact report is generated. Temporary collections are created for the objects where the operations were successfully applied, and for the ones where errors were generated. The availability of this option depends on the user's system setup.

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

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



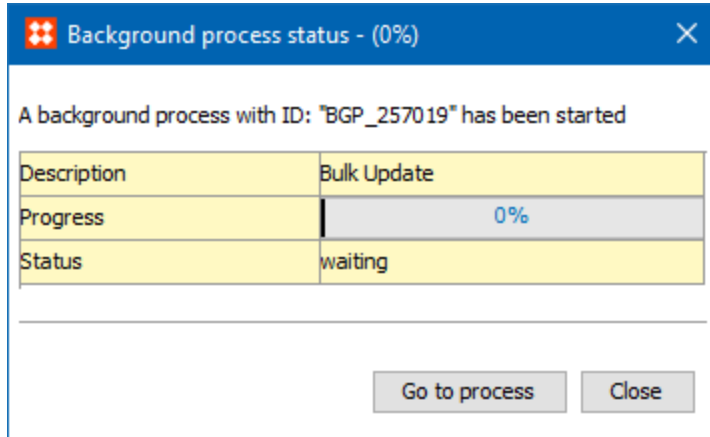
- **Process Description** displays the name for the background process.
- **Available for object types** limits the object types and nodes affected by the bulk update operations. First select an object type from the dropdown, then click the ellipsis button (...) to select the nodes to update.



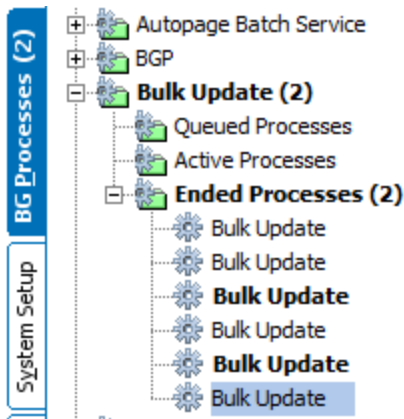
2. Click **Finish** to complete the bulk update configuration and start the operation(s) in a background process.
3. Monitor the bulk update as defined in the **Monitoring Bulk Updates** topic.

Monitoring Bulk Updates

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



Click **Go to Process** to display the Background Process tab for 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.

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

⏪
⏴
1-20 of 20
⏵
⏩

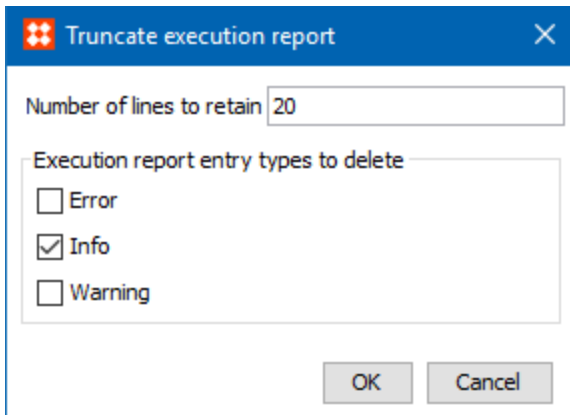
Save...
Truncate

Bulk Update Actions

Relaunch Wizard
Bulk Update OK Objects
Save Failed Objects
Impact Report

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

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



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

Scheduling Bulk Updates for Collections

Scheduling a bulk update with collections is useful for a group of objects that needs to be updated on a regular basis. The scheduled collection can save time instead of performing it manually. For example, if all current accessory references should be removed before a group of objects is implemented into a workflow.

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

Prerequisites

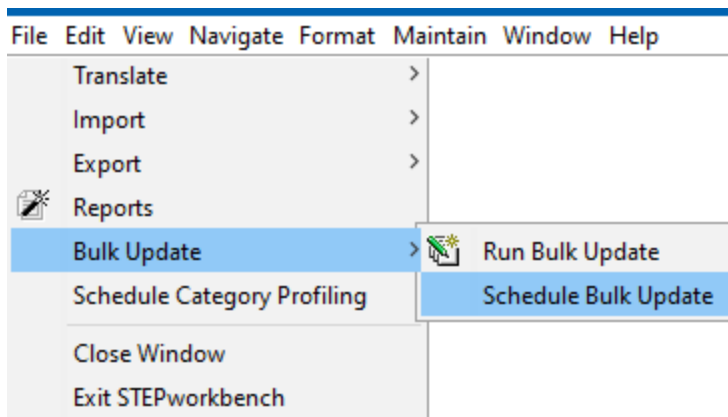
The following tasks must be completed before a collection is scheduled to run a bulk update.

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

Scheduling Bulk Updates

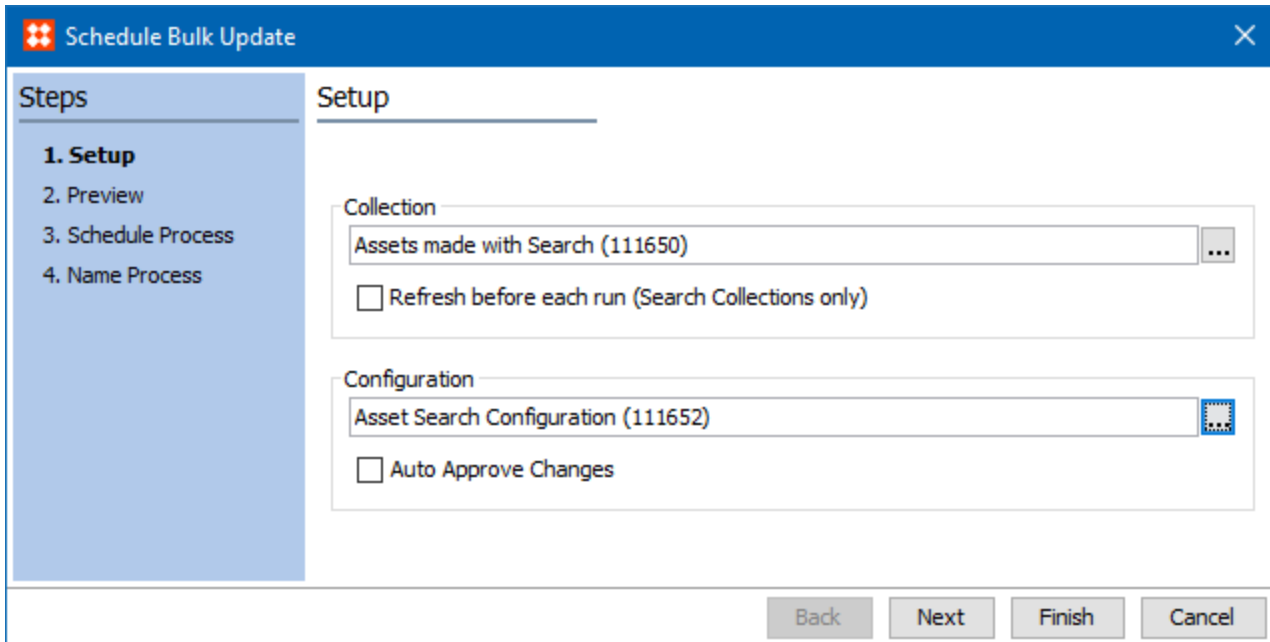
To perform a bulk update on a collection at regular intervals, create a schedule that applies to a particular collection. The bulk update is then automatically run at the scheduled time.

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

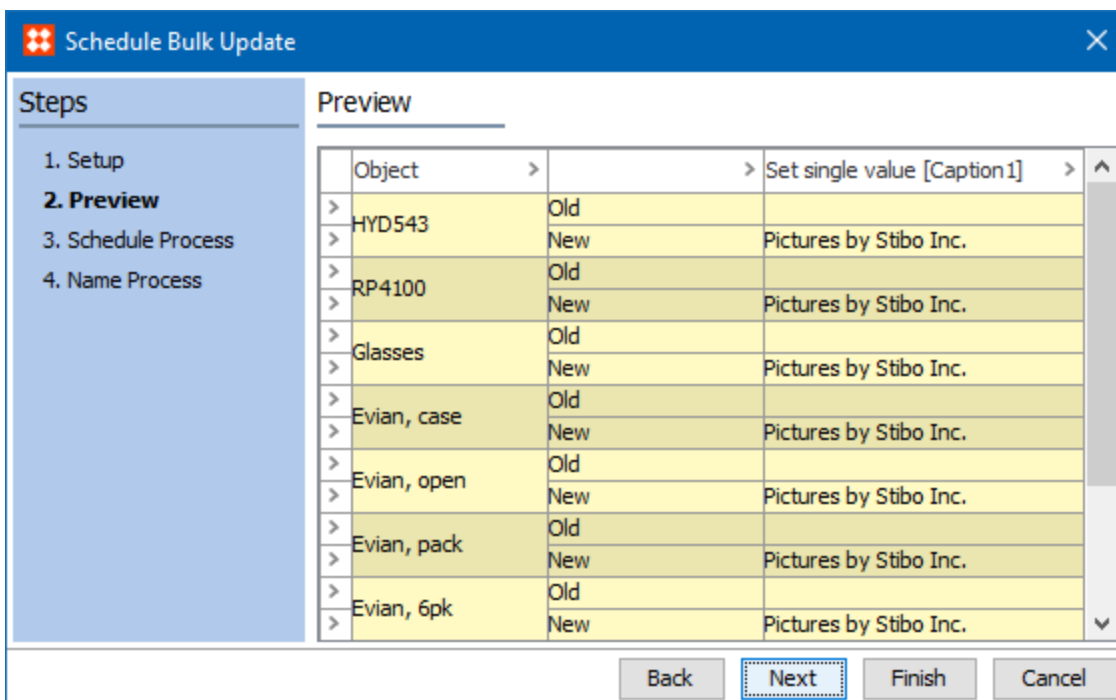


2. On Setup, for the Collection parameter, click the ellipsis button (...) to locate and select the relevant collection. This option is not valid if the collection is created from the File menu, Bulk Update option, Run Bulk Update.
 - For the **Refresh before each run (Search Collections only)** parameter, if the collection selected was created using the search criteria, and the checkbox is selected, it will refresh the collection based on the

current data in STEP using search criteria, before executing the bulk update operation(s).



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



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

Schedule Bulk Update

Steps

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

Schedule Process

Start

Now Start at (hh:mm): 11:04
 Later Start on (yyyy-mm-dd): 2016-08-19
 Weekly End on (yyyy-mm-dd): -
 Monthly Every: Mon Sat
 Later and repeat Tue Sun
 Wed
 Thu
 Fri

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

Back Next Finish Cancel

- 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.

Schedule Bulk Update

Steps

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

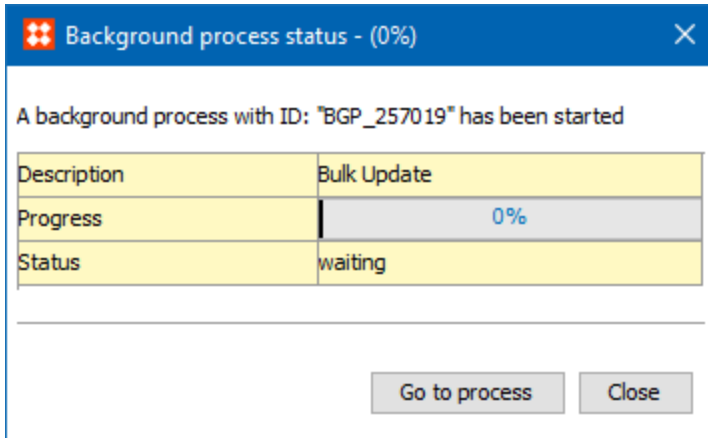
Name Process

Schedule Process Name: Scheduled Bulk Update

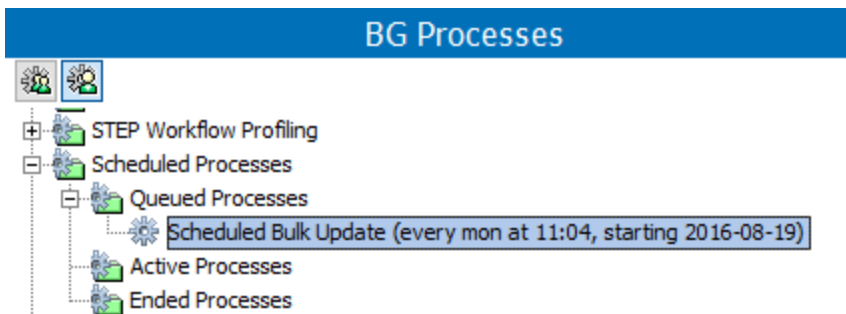
Process Name: Bulk Update

Back Next **Finish** Cancel

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



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



Below, on the BG Processes tab, the Execution Report shows the process with a Status of 'waiting.'

← 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](#)

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

Scheduling a Collection Refresh in Web UI

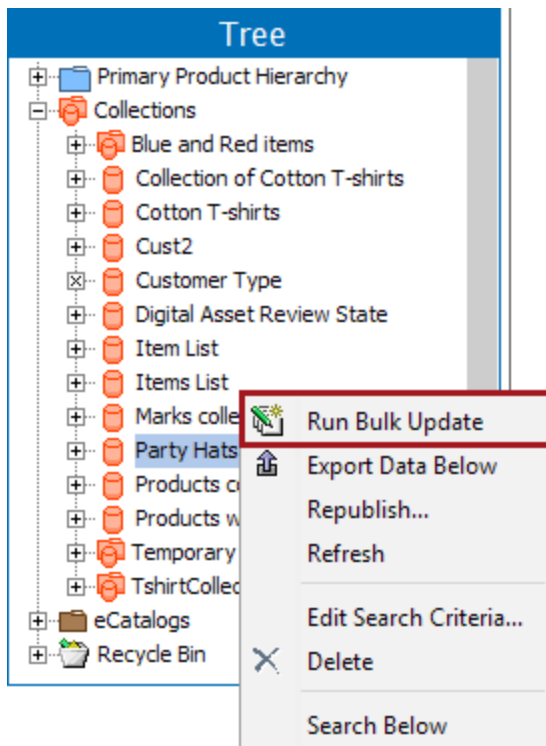
Collections are often used as filters on status selectors, though to refresh a collection in the Web UI you must go to the collection directly to refresh it in Web UI without going to the collection directly. This can be accomplished by going to the collection content screen directly or via a scheduled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

For more information on status selectors, see the **Status Selector Homepage Widget** topic in the **Workflows in Web UI** section of the **Web User Interfaces / Web UI Setup and User Guide** documentation.

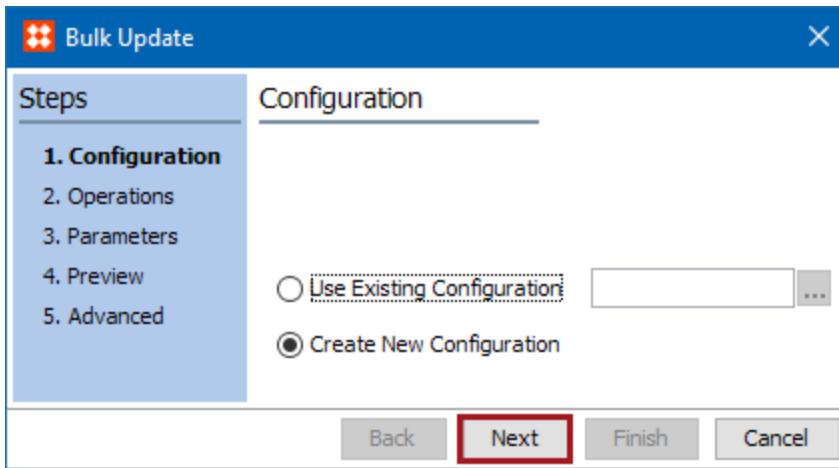
Important: Consider the time zone of the application server compared to that of the workbench (the client) where the schedule is created or viewed. When scheduling a job, the local time zone is displayed in the workbench, but the time zone of the server is used to run the background process. Although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

To schedule a collection refresh, follow the directions below:

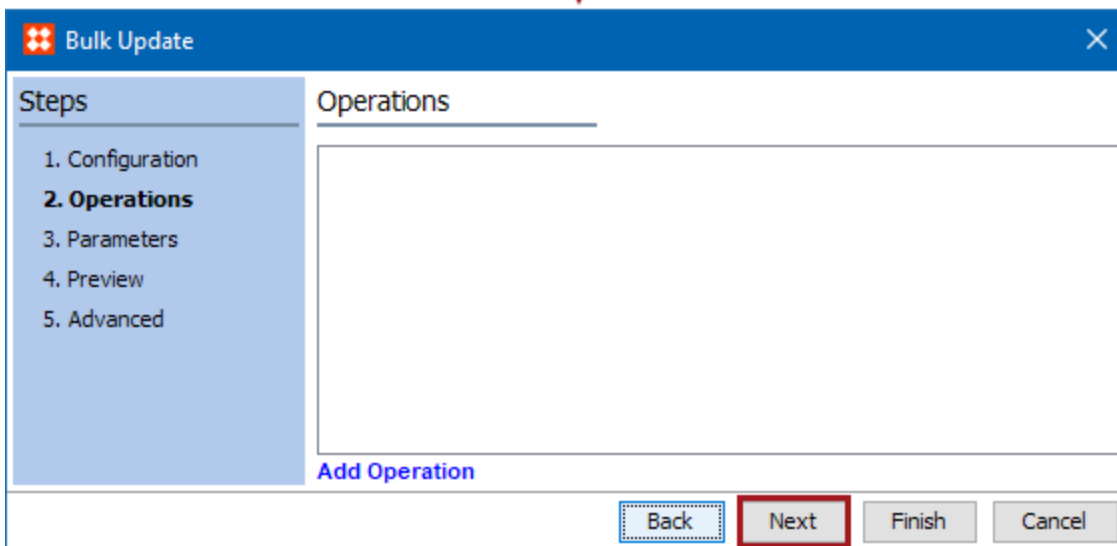
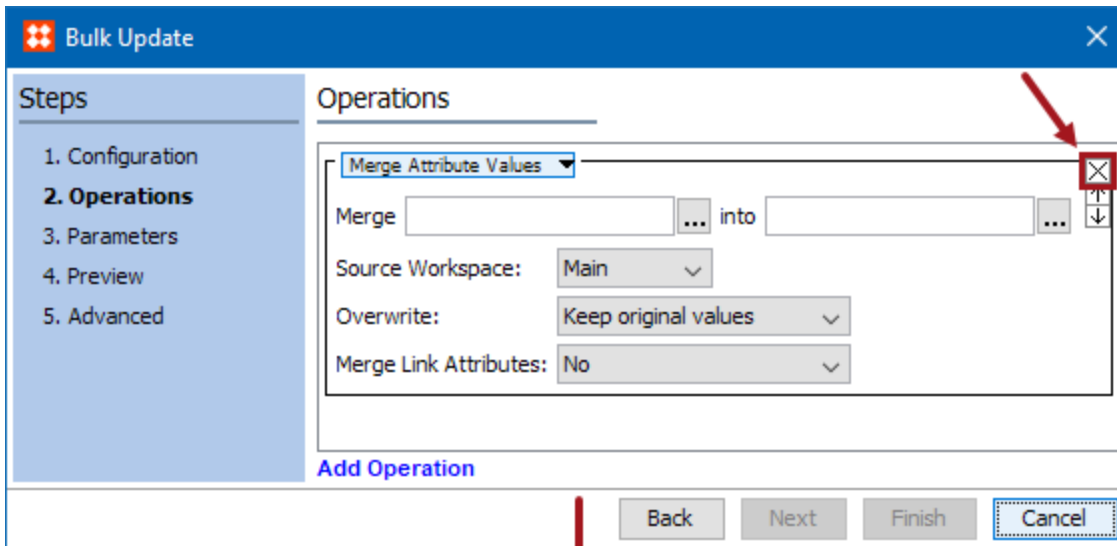
1. Create a new bulk update configuration. In the example below, a collection is created by right-clicking on the desired collection in workbench and selecting **Run Bulk Update**.



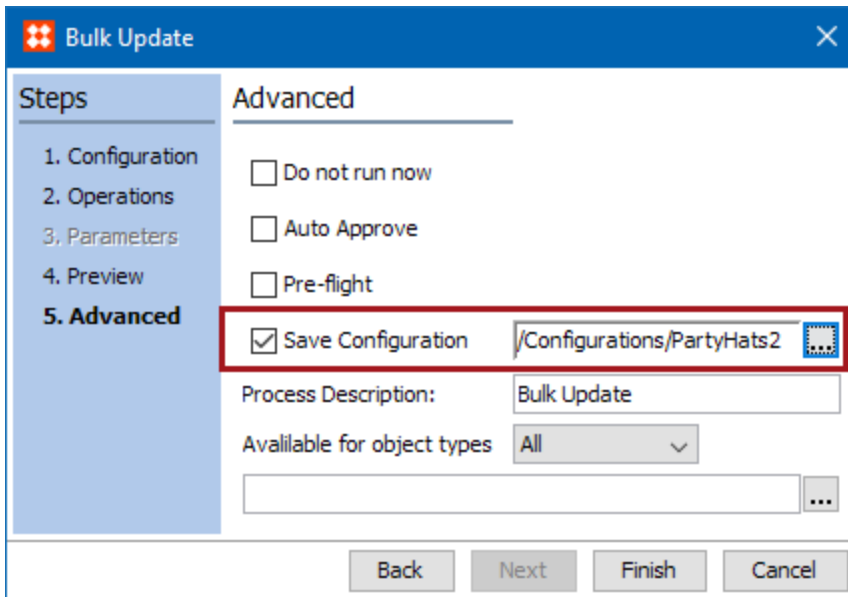
2. In the Bulk Update dialog, select **Create New Configuration**, and click **Next**.



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

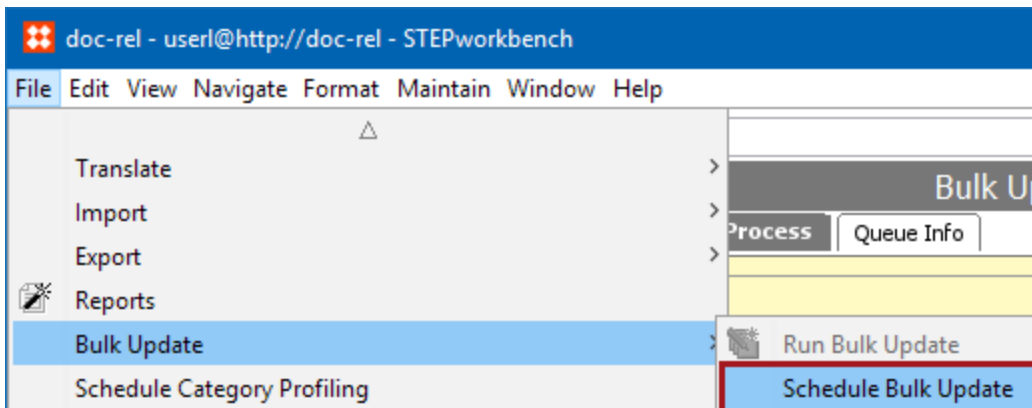


4. Continue to click **Next** to get to the final step, and be sure to select **Save Configuration** before finishing.



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

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



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

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

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

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

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