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# BULK UPDATE

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# Bulk Update Purpose and User Accessibility

## **[Bulk Update] Purpose**

The [Bulk Update] feature will allow GroveSite users to easily update or add information to existing records via an excel spreadsheet. Simply download a populated template which contains existing data, delete columns and rows that will not be updated, make necessary changes or additions save and upload the new data.

## **User Accessibility**

The [Bulk Update] link will be displayed to Moderators and Admin within an active Organization. Participants can be granted access to this link, however; the hosting Organization would need to contact GroveSite to enable this feature for Participants.

# Features, Requirements & Security

## Features

- **Built in Drop Down Lists** - Included on the template for drop down, lookup, radio buttons and checkbox fields. If a value is entered on the spreadsheet and does not match a selection in one of these fields, then the update will not allow the change. Therefore, by including the built in drop down lists on the spreadsheet; it ensures that the value is correct and will get updated properly.
- **Required Fields** - Will be indicated with a Red Asterisk after the field name.
- **Ability to Remove Columns** - Often, a database can have many columns, but only a portion are needed. Therefore, any columns not needed can be removed except for TableRecordID, OwnerEmail and ParticipantGroupName.

## Template Requirements & Security

- **TableRecordID and OwnerEmail** - These are system fields that are always required to be on the spreadsheet. During an update the system will render an error message if uploaded without these two fields. The system will also render an error message if the "TableRecordID's" are missing. When the template is uploaded, the system uses the "TableRecordID's" from the spreadsheet to match up the "TableRecordID" from the database table.
- **ParticipantGroupName** - This is a system field that is required if Participant Groups are turned on for the Organization. The update will render an error message if uploaded without this field.
  - **Note:** If Participant Groups are turned on the populated template downloaded will include this field.
- **User Friendly Column Names** - The top two rows need to be on the template in order for the update to work. Row one has the database field names and the second row on the template will be the "user friendly" label names. Occasionally, database table field names can differ from the label names. Therefore, we have added both rows for easy identification.
- **Moderator Edit and Moderator View Fields** - All fields will be displayed on the template. However, fields that are "Moderator View Only" will not display any data on the populated template. Fields that are "Moderator View" will display data. Either "Moderator Edit or Moderator View" fields can't be updated by a Participant. If a participant were to try and update either one of these fields, the data entered would be ignored.

# New Form & Link

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The screenshot shows a web browser window with the title "Product Development Bulk Update" and the GroveSite logo. The page is divided into two main sections: a configuration area on the left and a data table area on the right.

**Left Panel (Configuration):**

- Step 1 of 3:** "Select the Database Table you wish to update. Next, download the Excel import template below and enter your data. You will upload your saved Excel spreadsheet in step 2." The "Database Table" dropdown is set to "Easy Issue Tracking". "Template Style" has "Populated Template" selected. "Include Thumbnail?" is unchecked. A "Template" link with a download icon points to "Click here to download the template for Easy Issue Tracking".
- Step 2 of 3:** "Upload the template here." The "Upload Template" section shows a "Browse..." button with the text "No file selected." and "Upload template" and "Cancel" buttons below it.

**Right Panel (Data Table):**

- Section: "Easy Issue Tracking"
- Buttons: "[Add a New Issue]", "[Export Records]", "[Import Records]", "[Bulk Import]", "[Bulk Update]", "[Quick Edit]", "[Quick Discussion Post]". The "[Bulk Update]" button is highlighted with a yellow circle.
- Text: "Column Headers" with an unchecked checkbox.
- Table: A table with columns "Category" and "Issue". The table is empty, displaying "No data to display".
- Bottom Buttons: "[Add a New Issue]", "[Export Records]", "[Import Records]", "[Bulk Import]", "[Bulk Update]", "[Quick Edit]", "[Quick Discussion Post]".

At the bottom left, it says "Powered by GroveSite".



# Update Template

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1. On the populated template delete any rows or columns not being updated. Do not hide or filter rows or columns on the spreadsheet.
  - TableRecordID (Column 1), and OwnerEmail (Column 2) are always required fields and must always be on the spreadsheet in the first two columns.
  - ParticipantGroupName (Column 3) is a required field if the organization is using this feature. If Participant Groups are turned on, when the spreadsheet is downloaded, that field will be displayed in the 3rd column and should not be removed from the spreadsheet.
2. Edit rows with new data and save a new version of your template to your PC
3. Click on the Browse button in Step 3 to select your saved template.
4. Click Upload template

A	B	C	D	E	F	G	
1	TableRecordID	OwnerEmail	-view-	QuoteValidTo	Vendor	VendorNumber	VendorContact
2	TableRecordID	OwnerEmail	-view-	Quote Valid To	Vendor Name	Vendor ID Number	Vendor Contact Name
	1977318	part1@grovesite.com		1/2/2017 0:00	Designs R Us	125	Julie
3							
	1977319	part1@grovesite.com		1/2/2017 0:00	Designs R Us	125	Julie
4							

A	B	C	D	E	F	
1	TableRecordID	OwnerEmail	ParticipantGroupName	-view-	ChannelCom	VendorStyleNumber
2	TableRecordID	OwnerEmail	ParticipantGroupName	-view-	_Com Channel Mod Edit	Vendor Style Number
	1972292	part1@grovesite.com	Clever Creations		Unchecked	HG-45813
3			O'Brien World		Checked	KL-21330
4						

## Step 2 of 3

Upload the template here.

[Upload Template](#)

No file selected.

For more information regarding features, requirements and security, please see slide 4.

Note: Image can't be updated using this process. The image is only included as a reference.





# Update Review Screen

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1. Review records for complete and accurate content.
  - The row highlighted in green indicates that a field that had data in it was blanked out. This is correct as the category “Baskets” was removed. This record can still be updated by checking the box to the left.
  - The row highlighted in yellow indicates that the record ID is not found. The record ID on the spreadsheet does not exist for the user logged in, and that record can’t be updated.
2. Click Finish and Close.

**Product Development**  
**Bulk Update**

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**Step 3 of 3**

- Review your records below: Note that if you are updating existing records, the columns and data shown will **overwrite any previous data**.
- Uncheck records that you do not want to process.
- When you are finished reviewing, scroll to the bottom of form and click **Finish**.

	TableRecordID	OwnerEmail	-view-	QuoteValidFrom	QuoteValidTo	Season	Department	Category	Theme	Buyer	Vendor	VendorNumber
<input checked="" type="checkbox"/>	1977550	part1@grovesite.com		4/22/2017 12:00:00 AM	4/22/2018 12:00:00 AM	2017 Summer	310 Outdoor	Accessories	Casual Fusion	Sara Andrews	Designs R Us	8989
<input type="checkbox"/>	Existing Data Cleared*** 1977551	part1@grovesite.com		4/22/2017 12:00:00 AM	4/22/2018 12:00:00 AM	2017 Summer	310 Outdoor		Casual Fusion	Sara Andrews	Designs R Us	8001
<input type="checkbox"/>	ID not found* 1977899	part1@grovesite.com				2017 Spring		Accessories	Casual Fusion	Sara Andrews	Designs R Us	

**Error Message Key**

- \* Record id not found in page
- \*\* Parent Record id not found in page
- \*\*\* Record has existing data that will be cleared by update. Check box to continue to update or leave unchecked to ignore update.

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**Product Development**  
**Bulk Import**

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**Step 3**  
Summary of this import

Rows Added: 3

Rows Updated: 0

Rows Skipped by User: 0

Rows with Errors:

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**Note:**

- ID not found means that you have entered a table record ID that does not exist for the user logged in, and that record can’t be updated.
- Existing Data Cleared – If you have receive this error message, you can still check the box to proceed; however, this is a warning that you have cleared existing data in one or more fields and if you proceed you will wipe out the data for those fields.