



USING THE BULK EDIT TOOL

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Qdabra's Bulk Edit Tool allows users to quickly perform operations on more than one xml document. It is a standalone tool which is separate from DBXL installation. However, it still requires DBXL to be installed on the server machine, as the tool will perform bulk edits on the documents submitted to the DBXL Web Service. If database mapping is specified on DBXL, the tool will also shred the edited documents.

This document provides step-by-step instructions on how use the Bulk Edit Tool. Follow these steps to see how the tool can help make working with DBXL forms a bit easier.

INSTALL THE BULK EDIT TOOL

1. Run the **BulkEditInstall.msi** file to start the installation.
2. Follow the on-screen instructions as you go through the installation process.
3. Choose the directory to install the program to. By default, it will be installed in *C:\Program Files\Qdabra Software\Qdabra Bulk Edit Tool*.
4. After successful installation, run the tool from your start menu. It will be located at:
Start > All Programs > Qdabra > Tools > Qdabra Bulk Edit Tool.



5. Alternatively, if you installed the tool in the default location, you can navigate to *C:\Program Files\Qdabra Software\Qdabra Bulk Edit Tool* and run **BulkEditTool.exe**.

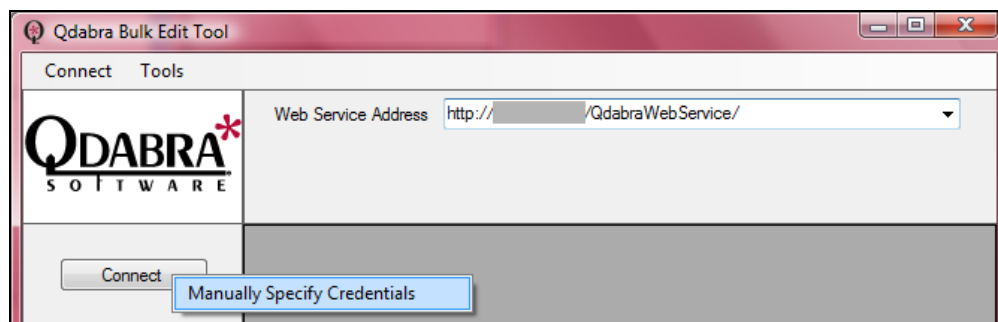
PERFORM THE BULK EDIT

1. Run the Bulk Edit Tool from your start menu. It will be located at: *Start > All Programs > Qdabra > Tools > Qdabra Bulk Edit Tool*. Alternatively, if you installed the tool in the default location, you can navigate to *C:\Program Files\Qdabra Software\Qdabra Bulk Edit Tool* and run **BulkEditTool.exe**.
2. Enter the DBXL URL in the **Web Service Address** field in the format:
http://<servername>/QdabraWebService

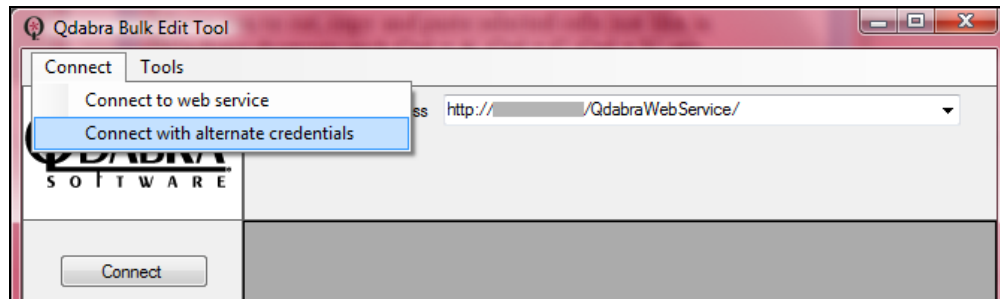
Hints:

- Any URL that is used to connect to the Web Service is added to the dropdown box and remains there when the program is closed and opened.
 - The last-used URL also remains as the current text in the dropdown box the next time you open the tool.
 - URLs can be removed from the list by opening the Settings dialog from the Tools menu and removing them from the list on the DBXL URLs tab.
3. Click on the **Connect** button. *If you wish to connect to the Web Service using alternate credentials, there are two ways:*

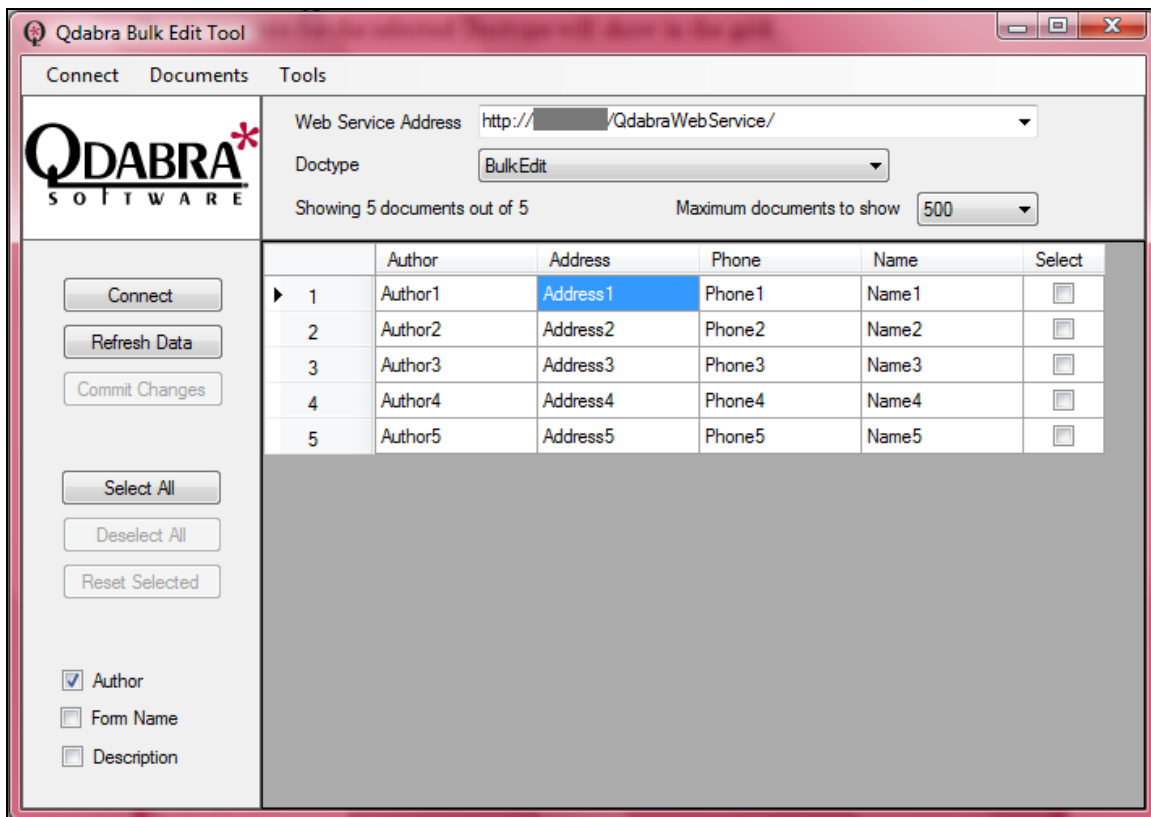
- a. Right-click on the **Connect button** and click **Manually Specify Credentials**



- b. Click **Connect** from the tool menu, then select **Connect with alternate credentials**. You will then be prompted to enter an alternate **Username** and **Password**.



4. Select the Doctype that you want to edit from the **Doctype** dropdown box that appears under the **Web Service Address** box. You can set the maximum number of documents to display at one time on by selecting a value from the **Maximum Documents to Show** dropdown box.
5. Click Load Doctype. The documents for the selected Doctype will show in the grid. To display/hide the documents' Metadata Fields, check or uncheck the checkboxes for the **Author**, **Form Name**, and **Description** fields. You can also choose which Metadata fields are visible by default in the Settings dialog. For this example, check the **Author** Metadata Field.





6. You can now start performing bulk edits on the documents of your choice.

CUT AND PASTE

The Bulk Edit Tool allows you to cut, copy and paste selected cells just like Excel. You can even use Windows shortcuts such Ctrl + A, Ctrl + C, Ctrl + V, etc. To demonstrate this, follow these steps:

Change the other **Author** entries (promoted by the **Author** Metadata field) to **Author1**.

- Click the cell that says **Author1**.
- Press **Ctrl + C** on your keyboard to copy the contents of this cell to the clipboard.
- Drag your mouse cursor over the **Author** entries in Rows 2 and 3 and press **Ctrl + V** on your keyboard to paste the data from the clipboard into the selected cells. You will notice that the modified cells are highlighted, showing you which fields will be changed once you commit your changes, thus allowing you to undo or make more changes as necessary. (See **Page 17** for *Useful tips on how to undo changes*.) Cells in rows that contain changes, but do not actually have any changes themselves, will be displayed in gray.

	Author	Address	Phone	Name	Select
1	Author1	Address1	Phone1	Name1	☐
2	Author1	Address2	Phone2	Name2	☐
3	Author1	Address3	Phone3	Name3	☐
4	Author4	Address4	Phone4	Name4	☐
5	Author5	Address5	Phone5	Name5	☐

- Click Commit Changes.
- Depending on how many documents are being changed, the process may take a while. The tool will start the bulk edit process by first locking the individual documents so that nobody else (except you) will be able to modify the documents you are performing bulk editing on. The tool will then commit all the changes you have made and finally unlock the documents to make them available for other users once again.
- You will get a confirmation message stating that the changes have been committed. Click OK.
- To check that the bulk editing succeeded, open the DBXL Administration Tool.
- Click on the **Docs** cell (represented by the number of docs present in the corresponding doctype) for the **BulkEdit** doctype. In this example, we have 5 documents.



DATABASE ACCELERATOR Administration Tool					
Configure Licenses			New Configuration	Refresh List	
Document Type Configuration					
Name	Descriptions	Form Version	Docs	Edit	Del
BulkEdit		1.0.0.7	5		
QdNotification		1.0.0.914	0		

- i) On the **Documents** tab in DAT, you will see that the **Author** Metadata column shows that the **Author** fields for the 2nd and 3rd documents have changed to **Author1**.

Documents						
Doc. ID	Ref. ID	Version #	Name	Author	Description	New
1	1	1	FormName1	Author1	Description1	Open
2	2	2	FormName2	Author1	Description2	Open
3	3	2	FormName3	Author1	Description3	Open
4	4	1	FormName4	Author4	Description4	Open
5	5	1	FormName5	Author5	Description5	Open

FILTERING

We can also set filters in the Bulk Edit Tool.

- a) Back in the tool, right-click on the **Author** column header and click **Set Filter**.

	Author	Address	Phone	Name	Select
1	Author1		Phone1	Name1	☐
2	Author1	Address2	Phone2	Name2	☐
3	Author1	Address3	Phone3	Name3	☐
4	Author4	Address4	Phone4	Name4	☐
5	Author5	Address5	Phone5	Name5	☐

- b) In the **Custom Filter** dialog, specify the appropriate filter/s that you wish to apply. For this example, select **equals** from the dropdown list and enter **Author1** in the textbox, then click **OK**.

- c) After setting the filter, only the documents that have **Author1** value in the **Author** field, will be displayed.

	Author	Address	Phone	Name	Select
1	Author1	Address1	Phone1	Name1	☐
2	Author1	Address2	Phone2	Name2	☐
▶ 3	Author1	Address3	Phone3	Name3	☒

- d) Change the fields for the first document as specified below:

Address: Kirkland, WA

Phone: (877) 544-2389

Name: Qdabra Software

	Author	Address	Phone	Name	Select
1	Author1	Kirkland, WA	(877) 544-2389	Qdabra Software	☐
2	Author1	Address2	Phone2	Name2	☐
▶ 3	Author1	Address3	Phone3	Name3	☒

- e) Click on the cell for the **Address** field on the first document and Press **Ctrl + C**.
- f) Drag your mouse cursor over the **Address** entries in Rows 2 and 3 and press **Ctrl + V**.



	Author	Address	Phone	Name	Select
1	Author1	Kirkland, WA	(877) 544-2389	Qdabra Software	☐
2	Author1	Kirkland, WA	Phone2	Name2	☐
3	Author1	Kirkland, WA	Phone3	Name3	☐

- g) Click Commit Changes.
- h) Click OK to close the confirmation dialog.
- i) To verify that the changes were committed, open the first document. Aside from opening through the DAT, you can also open the document from the Bulk Edit Tool itself. Right-click on the DocId which is found on the first column of the table, then click Open document.

	Author	Address	Phone	Name	Select
1	Author1	Kirkland, WA	(877) 544-2389	Qdabra Software	☐
2		nd, WA	Phone2	Name2	☐
3		nd, WA	Phone3	Name3	☐

The document/form will open in InfoPath, showing all the changes made.

File Edit View Insert Format Tools Table Help	
Submit	
Verdana	10 B I U
Start Ink Entry	
Author	Author1
Form Name	FormName1
Description	Description1
Name	Qdabra Software
Phone	(877) 544-2389
Address	Kirkland, WA
Submit	



BULK EDIT A NEW FIELD

Before we can use the Bulk Edit tool on a new field, we must first make sure to promote it in our InfoPath form.

1. Promote the field in InfoPath:
 - a. Open your InfoPath form (XSN) in design mode.
 - b. Go to **Tools > Form Options > Promoted Properties**.
 - c. Click **Add** and select the field you wish to promote. Click **OK**.
 - d. Repeat step (c) is promoting more than one field. When done, click **OK** to exit the **Form Options** window.
 - e. Save the XSN and close InfoPath.
2. Update the XSN in the Central Admin site and in DAT by following the document named: **How to Edit and Re-publish your Form Template**.
3. Reshred
 - a. Still in DAT, switch to the Database tab.
 - b. Click **Reshred All Documents**. Click **Yes** on the warning, and then click **OK** on the confirmation dialog.
4. Bulk Edit
 - a. Launch the Bulk Edit tool and proceed with the Bulk Edit operation as described in Page 2.

The reshred operation allows DBXL to update all the xmls with the new field that was added and promoted in the XSN.



OTHER USEFUL TIPS

1. **Sorting:** You can sort the data in each column either by ascending or descending order. To do this, click on the Column Name (Metadata Field Name) that you want the data sorted by. For example, click on **Author** to sort the **Phone** entries. A small arrow beside the Column Name indicates whether the data are sorted by ascending or descending order.
2. **Undo Changes:** Note that you can only undo the changes that you have made prior to clicking the **Commit Changes** button. Under the **Select** column, tick the checkbox for the corresponding row/s that you want to undo the changes with, and then click on **Reset Selected** on the left pane of the tool.
3. **Refresh Data:** This button acts similarly to the **Refresh** icon in the DBXL Administration Tool (DAT). This is useful if you or someone else has made changes to the documents through other means and you want the changes to be reflected on the Bulk Edit Tool.
4. **Create new document:** You can create a new document directly from the Bulk Edit Tool. This is done by right-clicking the Doctype Name in the **Doctype** dropdown and clicking **Create New Document**, or by selecting **Open a new document** from the **Documents** menu.
5. **Delete documents:** You can delete document(s) from within the Bulk Edit Tool. After selecting the documents you want to delete by ticking the corresponding checkbox(es), click on **Delete selected documents** from the **Documents** menu.