

# Section 15

## Bulk Edit

[Select Categories for Bulk Edit](#)

[Bulk Edit Screen](#)

[Apply Edits](#)

The screenshot shows a software interface with a top navigation bar containing a search bar, user profile (Mike Foster), and various notification icons. Below the navigation bar is a 'Favorites' section with a list of documents. A context menu is open over the second document, showing options like 'Move To', 'Copy', 'Delete', 'Share', 'Bulk Edit', and 'D-Link'. Three blue callout boxes provide instructions: 1. Lock all documents before bulk edit. 2. Select the records to perform Bulk Edit operation. 3. From the More dropdown menu, select Bulk Edit option to edit the properties of multiple records that are the same or different categories.

3. From the *More* dropdown menu, select *Bulk Edit* option to edit the properties of multiple records that are the same or different categories.

2. Select the records to perform Bulk Edit operation.

1. You need to Lock all documents before bulk edit.

| Document ID        | Title                                   | Size    | Change Information | Effective    | Modified   | Author |
|--------------------|---|---------|--------------------|--------------|------------|--------|
| RPT-0000017        | CONTROL PANEL CP...                     |         | In Work            | Controlled   | 19/05/2017 | Mike F |
| 2012006-1EC-GA...  | Business Plan Agenda...                 |         | In Work            | Uncontrolled | 19/05/2017 | Mike F |
| 2012006-1EF-ELD... | CONTROL PANEL CP-024B PANEL ARRANGEMENT | 0 Bytes | In Work            | Controlled   | 20/07/2016 | Mike F |

**Bulk-Edit**

All fields available for bulk edit action are presented on this page. If you selected records for different category, or  
Only make the changes you want applied to all of the records you just selected. When you're done, select 'Save'

5. Click Save to apply the changes across all records.



Save

✕ Cancel



Lifecycle

- Select
- In Work
- Submitted
- Approved
- Released
- Rejected
- Cancelled
- On Hold
- None
- Archived

Status

Uncontrolled ▾

Change Info

Size :



Modified :

Select Lifecycle/Status

**Properties****Details**

Fields will be greyed out where you cannot make changes.

Primary Identifier

Secondary Identifier

Title

Prefix Title

Business Agenda

2017

Description

Category

General Arrangement Drawing

Project

Pump Station Upgrade



4. Make the changes you wish to apply to all selected records.

Designated Owner

Mike Foster



Designated User

Mike Foster





## Bulk-Edit

All fields available for bulk edit action are presented on this page. If you selected records for different category, only common fields are presented. Only make the changes you want applied to all of the records you just selected. When you're done, select 'Save' to apply the changes across all records.

Save

Cancel

Lifecycle Submitted

Status Uncontrolled

Change Info\*

Title :

RID :

Category : Version :

Size :

Modified :

7. Confirmation message will be displayed that all selected records have been successfully updated.

### Properties

#### Details

Bulk Edit Confirmation window will display.



### Bulk Edit Confirmation



Edits will be applied-are you sure?

Apply Edits

Cancel



6. Click *Apply Edits* to proceed.

Secondary Identifier

Title

Prefix Title

Busine

2017

Description

Category

General Arrangement Drawing

Change Category

TINA Help Search here... ACME-EPC Mike Foster

< Favorites

☐ ▾ ↻

☰ 📁 ☆ 📄 New Upload

| Favorites                |  |  |                           |                           |   |                          |  |  |  |
|--------------------------|--|--|---------------------------|---------------------------|---|--------------------------|--|--|--|
| <input type="checkbox"/> |  | 2012006-1EC-GA... <a href="#">0.1.3.0</a>                                | Submitted                 | Uncontrolled              |   | <input type="checkbox"/> |  |  |  |
|                          |  | Title: Business Agenda2017<br>RID: <a href="#">1928659</a> Size: 0 Bytes | Change Information: Rev 0 | General Arrangement D...  | Effective:<br>Modified: 22/05/2017 <a href="#">Mike F</a> |                          |  |  |  |
| <input type="checkbox"/> |  | RPT-0000017 <a href="#">0.1.0.0</a>                                      | Submitted                 | Uncontrolled              |   | <input type="checkbox"/> |  |  |  |
|                          |  | Title: Business Agenda2017<br>RID: <a href="#">2285268</a> Size: 0 Bytes | Change Information:       | Report                    | Effective:<br>Modified: 22/05/2017 <a href="#">Mike F</a> |                          |  |  |  |
| <input type="checkbox"/> |  | 2012006-1EF-EW... <a href="#">0.1.3.0</a>                                | In Work                   | Uncontrolled              |   | <input type="checkbox"/> |  |  |  |
|                          |  | Title: Business Agenda2017<br>RID: <a href="#">1928622</a> Size: 0 Bytes | Change Information: Rev 0 | Electrical Wiring Diagram | Effective:<br>Modified: 18/05/2017 <a href="#">Mike F</a> |                          |  |  |  |
| <input type="checkbox"/> |  | 2012006-1EF-EW... <a href="#">0.1.3.0</a>                                | In Work                   | Controlled                |   | <input type="checkbox"/> |  |  |  |
|                          |  | Title: Business Agenda2017<br>RID: <a href="#">1928622</a> Size: 0 Bytes | Change Information: Rev 0 | Electrical Drawing        | Effective:<br>Modified: 20/07/2016 <a href="#">Mike F</a> |                          |  |  |  |

8. You will see the changes have been applied to both records.

By performing any bulk action, Job number will be created, and notification sent. *Job Status Report* will be available on the header navigation.

Go back to [Section 15: Bulk Edit](#) or continue.

9. You will see the report of records in job status grid.

Export

Drag a column and drop it here to group by that column

| <input type="checkbox"/> | Job Id | Action    | Rids              | Job Status                      | Job Submitted | Job Completed | Notes |
|--------------------------|--------|-----------|-------------------|---------------------------------|---------------|---------------|-------|
| <input type="checkbox"/> | 55     | Bulk Edit | <a href="#">2</a> | <a href="#">(2/2)-Completed</a> | 22/05/2017    | 22/05/2017    |       |
| <input type="checkbox"/> | 47     | Bulk Edit | <a href="#">2</a> | <a href="#">(2/2)-Completed</a> | 18/05/2017    | 18/05/2017    |       |



11. Click on the Rids link will open a popup where user can see the records which has been selected for bulkedit.



10. Click on job status link will open popup where user can see the status of bulkedit records.

### Job Records- 55



Export



Drag a column and drop it here to group by that column

| <input type="checkbox"/> | Status         | Size    | Change Info | Category | Project              | Effective | Modified   | Lock | Menu |
|--------------------------|----------------|---------|-------------|----------|----------------------|-----------|------------|------|------|
| <input type="checkbox"/> | Uncontrolled   | 0 Bytes |             | RPT      | Pump Station Upgrade |           | 22/05/2017 |      |      |
| <input type="checkbox"/> | a Uncontrolled | 0 Bytes | Rev 0       | GAD      | Pump Station Upgrade |           | 22/05/2017 |      |      |

### Job Records- 55

Export [Settings]

Drag a column and drop it here to group by that column

| <input type="checkbox"/> | Type | RID                     | Primary Identifier | Title               | Version                 | Lifecycle S... | Category D... | Status       | Size    | Change |
|--------------------------|------|-------------------------|--------------------|---------------------|-------------------------|----------------|---------------|--------------|---------|--------|
| <input type="checkbox"/> |      | <a href="#">2285268</a> | RPT-0000017        | Business Agenda2017 | <a href="#">0.1.0.0</a> | Submitted      | Report        | Uncontrolled | 0 Bytes |        |
| <input type="checkbox"/> |      | <a href="#">1928659</a> | 2012006-1EC-GAD-C  | Business Agenda2017 | <a href="#">0.1.3.0</a> | Submitted      | General Arra  | Uncontrolled | 0 Bytes | Rev C  |

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