

Use bulk operations

Administrators sometimes must change multiple objects (hundreds or even thousands of documents). It is inefficient to change objects individually. But you can change multiple objects by using bulk actions and batch operations.

You can perform bulk actions on search and sweep results. In this unit, you will learn about bulk operations on searches.

You can find the documents by using a search, and then update them by using a bulk action. The application of these actions occurs either while the query runs or after the query runs. For actions that are applied after a query runs, you select the search results to which the actions apply.

Bulk actions and bulk operations

Bulk actions:

- are performed on objects during a search
- affect all objects that the search returns
- can be combined to perform several actions at the same time
- must be enabled before initiating the search

Batch operations:

- can be accessed from searches and other containers
- affect only selected objects
- can perform only one action at a time

Types of Bulk actions

The following are the two main types of bulk actions:

- **Predefined** - The actions are predefined and you specify them by selecting checkboxes, such as deletion or canceling check-out of documents.
You can select actions that might not be relevant for all search results. If an action is not relevant to a particular search result, it is not executed for that result.
- **Script** - You can define more bulk actions with a JavaScript script. To allow future reuse, save your scripts with a .js extension.

For more information, refer to the IBM FileNet P8 Platform V5.5.x Knowledge Center:

https://www.ibm.com/support/knowledgecenter/SSNW2F_5.5.0/com.ibm.p8.ce.admin.tasks.doc/p8pcc438.htm

Activity: Use bulk actions to modify security for multiple documents

Bulk actions are a powerful way to update multiple documents and should be used with caution. In this activity, you will create a search with a bulk action to update multiple documents simultaneously.

In this activity, you will accomplish the following:

- Check the security before running the bulk actions.
- Create a search for marketing materials.
- Create and run bulk actions that update security on the search results.
- Verify the security change on the marketing materials.

Check the security before running the bulk actions.

In this task, you will check the security of the documents before you run the bulk actions that adds the Marketing security group.

- Ensure that the IBM FileNet P8 Platform components are started.
If you have not started them earlier, start the components by using the earlier activity: *Prepare your system - Start IBM FileNet P8 Platform*.
- In the **Mozilla Firefox** browser, click the **ACCE** bookmark or type the following URL: **http://vclassbase:9080/acce**
- Type **p8admin** for the **User name** field, **FileNet1** for the **Password** field, and then click **Log In**.
- On the left pane of the **EDU_P8** tab, expand the **Object Stores** folder and then click the **Sales** object store.
- From the **Sales** tab, expand the **Sales > Browse > Root Folder** node on the left pane and then click **Marketing**.
- From the **Marketing** tab on the right pane, click the link of a document (Example: **MarketingPlan1.docx**).
- On the **MarketingPlan1.docx** tab, select the **Security** subtab and verify that the **Marketing** security group is not listed under the **Access Permissions** section.

The Marketing group is already configured in the Active Directory on your student system. You will run a bulk action to add the Marketing group to the documents in the next task.

- Close the **Marketing** and **MarketingPlan1.docx** tabs.
- Leave the administration console open for the next task.

Create a search for marketing materials.

In this task, you will create a search for use in bulk actions. You have already logged in to the administration console as p8admin and the Sales object store tab is opened.

- From the **Sales** tab, click **Search** on the left pane.
- From the **Saved Searches** tab on the right pane, click **New Object Store Search**.
- On the **New Object Store Search** tab > **Simple View** subtab, select **Document** for the **Class** field and then click **Yes** when you are prompted to fetch properties for the Document of Subclasses.
- Enter the following values under the **Criteria** section:
 - Property: **Document Title**
 - Condition: **Starts With**
 - Value: **Marketing**

Search: New Object Store Search

Simple View SQL View Bulk Actions (Disabled)

Class ⓘ Document ▼

Criteria ⓘ

Property	Condition	Value
A Document Title	▼ Starts With	▼ Marketing

The values you entered are used to construct a query for the objects of Document class. For an SQL statement, class (Document) is the table, each object is a row, and object properties (Document Title) are the selected columns.

You will enable the bulk actions in the next task and then run the search.

Create and run bulk actions that update security on the search results.

The search is open and the bulk actions are currently disabled. In this task, you will enable them, configure the update security bulk action, and then run the search.

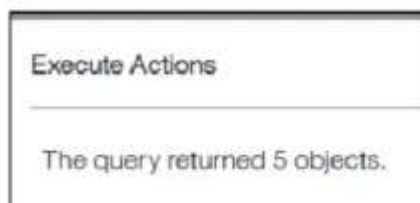
- On the **New Object Store Search** tab, click the **Bulk Actions (Disabled)** subtab and then select **Enable**.



- Scroll down to the **Security** area and then select the **Update security** option.
- Click **Add** and then select **Add User/Group Permission**.
You can also specify a role for role-based access.
- On the **Add Users and Groups** page, type **Marketing** in the **Search** field and then click **Search**.
- Select the **Marketing** group, move it to **Selected Users and Groups** by using the right arrow, and then click **OK**.
- Back the **New Object Store Search** tab, verify that the **Marketing** group is listed under the **Security** section.
- Scroll down to the **Permissions** area and then select the checkboxes under the **Add Allow** column for the following permissions.
 - View all properties
 - Modify all properties
 - View content
 - Create an instance
 - Change state
 - Minor versioning
 - Major versioning
 - Read permissions

- Click **Run**.

The **Execute Actions** page with a message about the query results is displayed.



- Click **Close** on the **Execute Actions** page and leave the **New Object Store Search** tab opened for the next activity.

Verify the security change on the marketing materials.

In the previous task, you ran a search that included a bulk action to update security. The action occurred as the search ran. Inspect one of the documents to ensure that the Marketing group was added to the document. The search tab is open, displaying the search that you recently ran.

- On the **Bulk Actions (Enabled)** tab, clear the **Enable** checkbox to disable bulk actions, click **Run** to run the search again, and then view the search results.
- Click the title of one of the documents in the **Search Results** table.

The document properties page opens in a tab.

- On the document properties page, open the **Security** tab and then verify that **Marketing** is now displayed in the **Access Control List**.

<input type="checkbox"/>	Name	Source	Permission Type	Permission Group
<input type="checkbox"/>	Marketing	Direct	Allow	Custom

If Marketing is not displayed, click Refresh.

- Select the checkbox for the **Marketing** row and then click **Edit**.
Verify that the permissions match the permissions that you specified for this group in the bulk action.
- Click **Cancel** and then click **Close** to close the document properties page.
- Click **Close** on the **New Object Store Search** tab, click **OK** to close when you are prompted, and then close the **Saved Searches** tab.
- Log out of the administration console and then close the browser.

Activity: Use bulk operations to cancel checkout of documents

Assume an example scenario where Misty, a member of the Marketing group, has left the company. Some of the documents were still checked out by this user. As an administrator, you must cancel the checkout so that other users can edit these documents. In this activity, you will use bulk operations that cancels checkout on all of the documents that Misty has checked out.

Important note: This activity builds on the previous activity and so ensure that the *Use bulk actions to modify security for multiple documents* activity is completed.

In this activity, you will accomplish the following:

- Preparation: Check out documents.
- Use batch operations to cancel the check out.


Preparation: Check out documents.

In this task, you will log on as Misty and check out some documents in the IBM Content Navigator (ICN) client to use later with the bulk action.


- In the **Mozilla Firefox** browser, click the **Finance Desktop** bookmark or enter the following URL: **<http://vclassbase:9081/navigator/?desktop=FinanceDesktop>**
- Type **Misty** for the **User name** field, **FileNet1** for the **Password** field, and then click **Log In**.
- Click the down arrow next to **Finance** on the upper right and select the **Sale** repository from the list.
- On the left pane, click the **Marketing** folder.
- Right a click a document that begin with **MarketingPlan** in the title and then select **Properties**.
- On the **Properties** page, select the **Security** tab, and verify that the **Marketing** group is listed for the **Author** field.

Author:	Marketing
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- Select all the documents that begin with **MarketingPlan** in the title (5 documents) and then click **Actions > Check Out > Check Out Only** to check out the documents.


			Details			
	Testfile4.docx	200 KB	p8adm	Check Out	Check Out and D	
	MarketingPlan5.docx	43 KB	p8adm	Check In	Check Out Only	
	MarketingPlan4.docx	43 KB	p8adm	Cancel Check Out	50 AM	1
	MarketingPlan3.docx	43 KB	p8adm	Link	50 AM	1
	MarketingPlan2.docx	43 KB	p8adm	Send Email	50 AM	1
	MarketingPlan1.docx	42 KB	p8adm	Version	50 AM	1

Misty is a member of the Marketing group and she can check out only documents to which the Marketing group has major and minor versioning permissions. You set these permissions in the previous task through a bulk action.

- Verify the checked out documents have a lock  icon and then log out of the ICN desktop and close the Browser.

Use batch operations to cancel the check out.

In this task, you will log in as an administrator (p8admin) and use batch operations to cancel the checkout of the Marketing documents that Misty has checked out.

- In the **Mozilla Firefox** browser, click the **ACCE** bookmark or type the following URL: **http://vclassbase:9080/acce**
- Type **p8admin** for the **User name** field, **FileNet1** for the **Password** field, and then click **Log In**.
- On the left pane of the **EDU_P8** tab, expand the **Object Stores** folder and then click the **Sales** object store.
- In the **Sales** tab, expand the **Sales > Browse > Root Folder** node on the left pane and then click **Marketing**.
- From the **Marketing** tab on the right pane, select the documents that begin with **MarketingPlan** in the title (5 documents that have lock  icon) and then click **Actions > Batch Operations**.

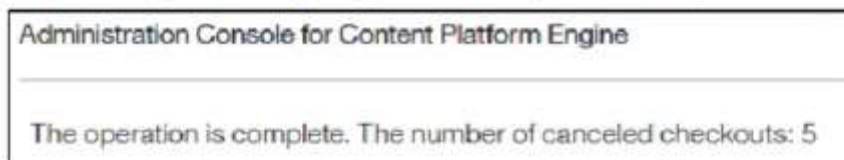
Use the Actions menu from the Contents subtab.

- On the **Batch Operations** page, open the **Actions** tab, select the **Cancel checkout** option under **Versioning**, and then click **OK**.

- Click **OK** when you are prompted with the message for the Cancel checkout.



- Click **OK** again when you get a message that the operation is complete.



- Back on the **Marketing** tab, verify that the checkout is cancelled for the documents that you selected (The lock icon is not shown now).
- Log out of the administration console and then close the browser.