

Modes Complete: Global update with an Element group

This function allows you to merge an element group into a set of records. You can merge 'top level' groups such as **Association** or **ObjectLocation** into your records, but not subsidiary groups such as **Person** or **Date**. You may need to begin by storing a suitable element group from the **Editor** tab.

Backup first!

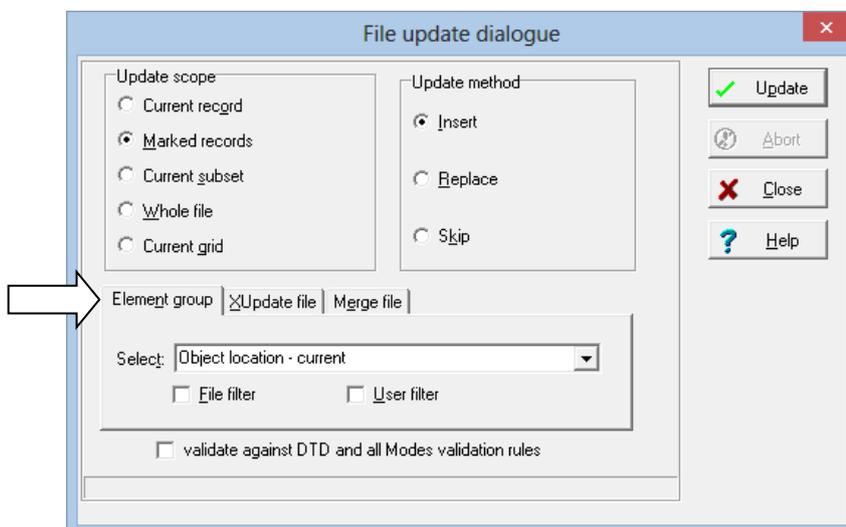
Before you start, make sure that you have a full backup of your records, as it is easy to make irreversible mistakes. See the guides on *Managing backups* and *Exporting data as XML*. You are advised to practice with small groups of records before you attempt global editing on a large-scale.

Setting up the update

You must be logged in with **poweruser** or **admin** rights to carry out global editing.

Create a subset, or mark the records to be updated.

Switch to **Editing** mode, then select **Update** from the **Edit** menu.



Select the **Element group** tab.

Use the **Update scope** section to determine which records will be updated.

Use the **Update method** section to determine how the element group will be inserted.

Pull down the **Select** box to show the list of available element groups. Choose an element group from the list.

The **File filter** and **User filter** boxes allow you to limit the list of element groups to those created from the current data file, or those created by the current user.

Update scope

The **Update scope** options allow you to select which records will be included in the update.

When **Current record** is selected, only the current record will be updated

Select **Marked records** to include only the marked records

Select **Current subset** to include only the records in the current subset

Select **Whole file** to include all the records in the file

Select **Current grid** to include all the records included in the current grid. Records not included in the current sort index will be ignored

Update method

The **Update method** options allow you to determine how records will be updated.

When **Insert** is selected, the update element will be inserted above the corresponding element group in the existing data. If there is more than one occurrence of the element group, then the new element will be inserted above the first one only. If there is no corresponding element group, the update element will be inserted at the end of the record.

Select **Replace** to replace the corresponding element group in the existing data with the update element group. If there is more than one occurrence of the element group in the record, then only the first one will be replaced. If there is no corresponding element group, the update element will be inserted at the end of the record.

Select **Skip** to insert the update element into records which have no corresponding element group. The update element will be added at the end of these records. Records which already include the element will not be updated.

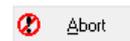
Running the update

Click the **Update** button.



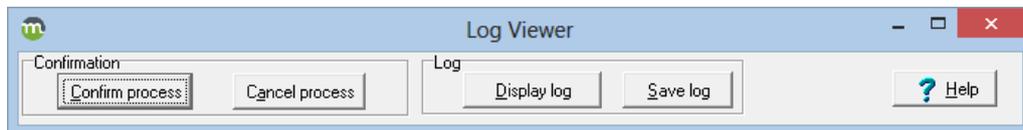
When **validate against DTD and all Modes validation rules** is ticked, the records will be validated as they are processed. If it is not selected, the validation status of the records will not be changed by the global edit. This feature can be used to correct errors in lower case and date elements. It is also a good safeguard against errors inadvertently introduced by the update.

You can interrupt the process by clicking the **Abort** button.



The Log Viewer

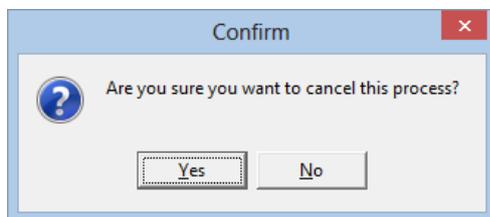
When the process is complete, the **Log Viewer** dialogue will appear.



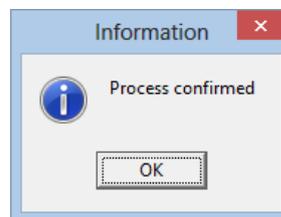
Click **Confirm process** to complete the edit. The updates are saved in your records.

Click **OK** to confirm, then click the **Close** button to finish.

If you think you may have made a mistake, click **Cancel process** to abandon the edit.



Click **Yes** to cancel the update.



Click **OK**, then click the **Close** button to finish.