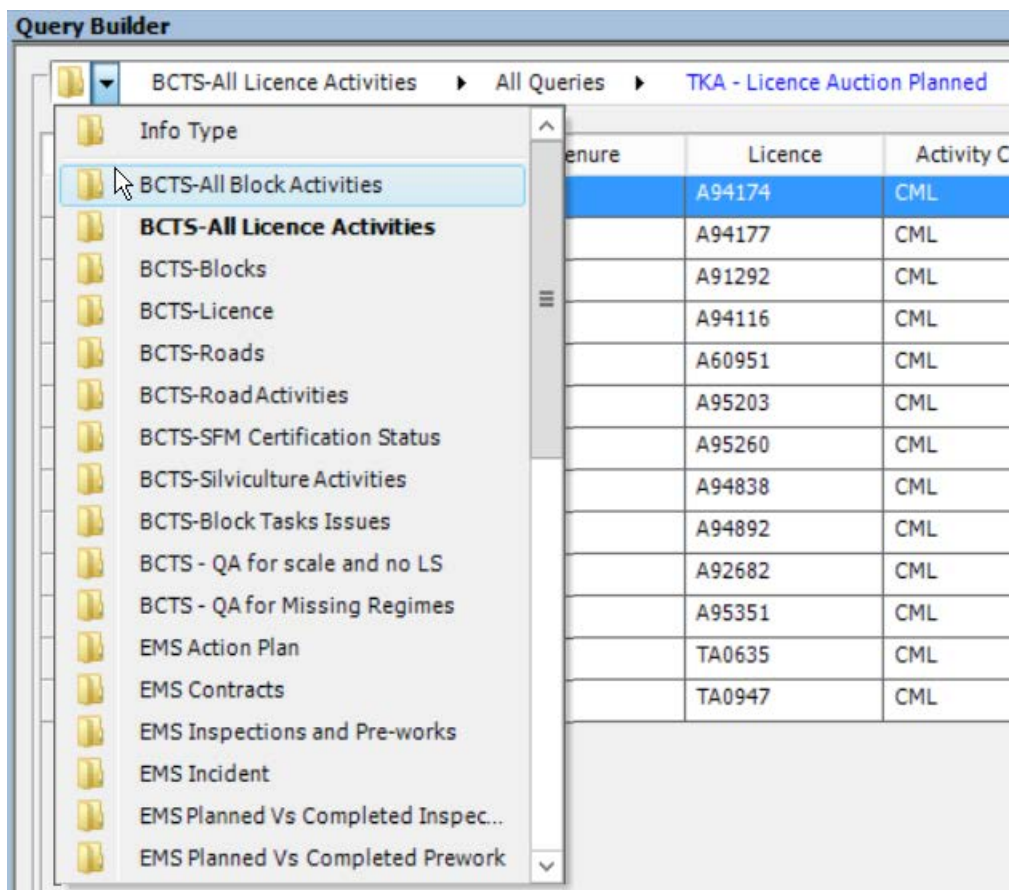


The Bulk Updater tool will allow you to update the date, status, responsibility and comment field on the Block Activity screen in LRM for multiple blocks at one time. In order to use the tool on multiple blocks, a working set has to be created first from the block activity records that you wish to update. You can't use a working set containing just the block records, it needs to contain the block activity records that you wish to update. You can use Query Builder to select a set of block activity records and create a working set from the selection. A number of TKA-specific planned block activity queries have been created and saved in Query Builder for commonly used activities to help you get started. You can use these or create your own queries. Below are instructions on how to run the existing TKA queries and create a working set.

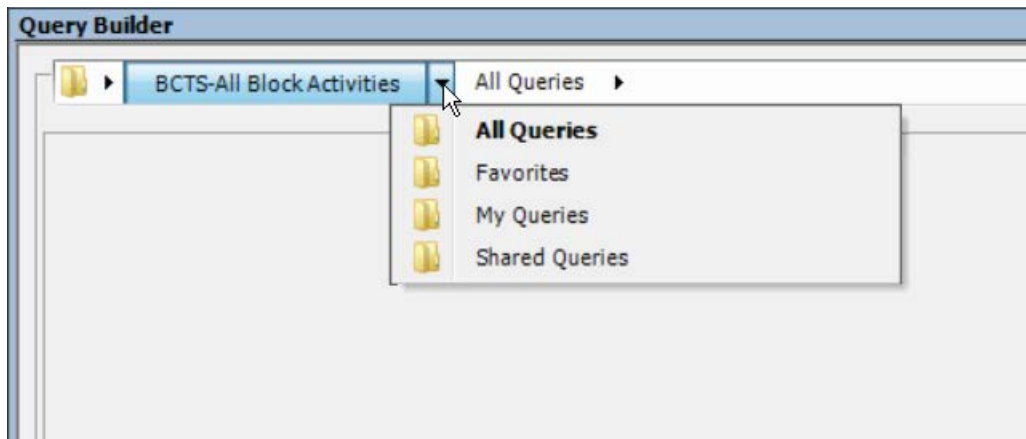
To learn more about Query Builder to create your own queries, refer to the UDUTU module BAWF05 – Introduction to Query Builder and BAWF10 – Master Detail View in the Basics classroom. There is also a module on the Bulk Updater (AWF06 – Bulk Update).

Creating a Working Set for Block Activities:

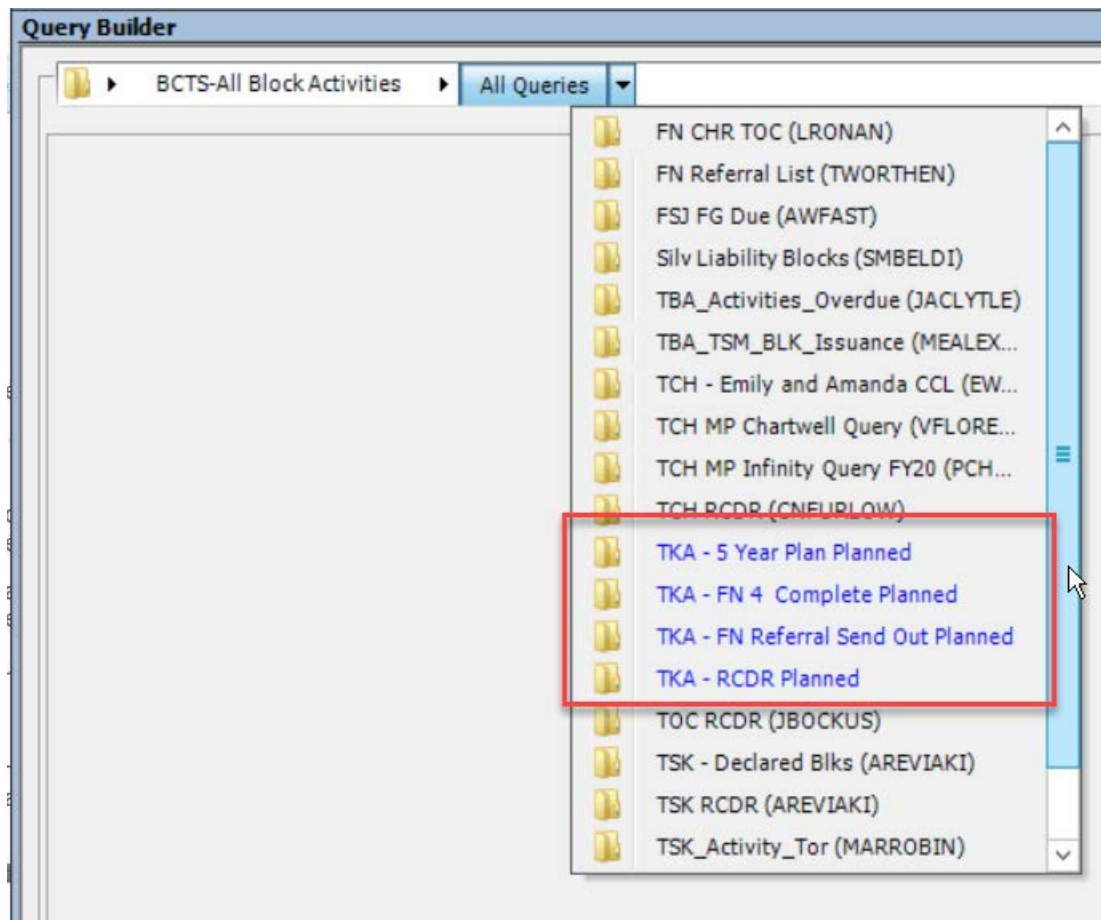
1. Make sure you are in the Blocks Module in LRM.
2. Open Query Builder  Query Builder
3. Starting on the left hand side of the QB screen click the dropdown arrow beside the yellow folder and choose BCTS – All Block Activities



4. Next click the dropdown to the right of BCTS-All Block Activities and choose All Queries



5. Next click the dropdown to the right of All Queries and choose one of the TKA block activity queries. (Note these queries will not display in blue on your screen, the one's in blue are the ones that you have personally created).



6. Choose the desired Field Team and Target Date range and click OK to run the query:

Enter Query Parameters for BCTS-All Block Activities: TKA - 5 Year Plan Planned

Name	Operator	Value(s)
Field Team:	=	Merritt
Target Date:	Between	4/ 1/2019 And 3/31/2020

☒ Match Case

OK Cancel Help

NOTE: Target Date = Planned Date in the Planning Info section of the Block Activity screen in LRM

Block Activity

Task	Activity Type	Status	Planning Info		Actual Info		Responsibility	Project Name	Contract Info	
			Planned Date	Planned Cost	Completion Date	Actual Cost			Contract ID	Contract
CMB	CMB - Referral-Complete-Dev-R	Done	2018/02/07		2018/02/07		DAVID LISHMAN			
CMB	CMB - Work in Progress	Done	2018/06/25		2018/06/25		JILL GAYFER			
CMB	CMB - Logging Started	Planned	2019/07/15		2019/07/15		RENE PIKE			
CMB	CMB - Logging Completed	Planned				\$0.00				
CMB	CMB - Free Growing Met	Planned								
FDP/FSP	FDP/FSP - Planned 5YR DP Sal	Planned	2019/07/01		2019/07/01		CHRISTIAN SHEARS			
Planning	Planning - Referrals Send Out	Planned								
Planning	Planning - Frst Nat 2 PFR	Planned								
Planning	Planning - Frst Nat 4 Complete	Planned								

If you want to query on block activities that have no Planned Date entered at all, change the Target Date Operator to 'Is NULL' (instead of Between) prior to clicking OK.

If you want to query on the Completion Date (Actual Info section) instead, you can modify the query to filter on the Activity Date field by running the query as shown above and then clicking the magnifying glass icon at the top right corner of the QB window and modifying the query parameters.

Once your query has executed, it will display in a table view. The bottom left corner will indicate how many records have been returned in your query.

Query Builder

BCTS-All Block Activities > All Queries > TKA - 5 Year Plan Planned

Business Unit	Management Unit	Field Team	Tenure	Licence	Permit	Mark	Block ID	Block Number	Activity Type	Activity Code	Activity Date	Activity Status	Responsibility	Contractor	Cost
TKA	Herrett	Herrett	820	A1008		93560	CO868	CO868	Planned SVR CP S	SVR	2018-07-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A82766		95766	TN8Y6	TN_2016_FFT204	Planned SVR CP S	SVR	2018-11-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A52676		92676	CO87Q	CO87Q	Planned SVR CP S	SVR	2020-03-30	P	CASCADE FIELD		
TKA	Herrett	Herrett	820	A52676		92676	CO86C	CO86C	Planned SVR CP S	SVR	2020-01-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A52656		92656	RL8JL	RL8JL	Planned SVR CP S	SVR	2019-04-01	P	CASCADE FIELD		
TKA	Herrett	Herrett	820	A52656		92656	RL7Q4	RL7Q4	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	(Herrett Plans	Write_off	_Unassigned	WL8TV		Planned SVR CP S	SVR	2019-05-01	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	(Herrett Plans	Pinnarus - PH	_Unassigned	PH_2016_02	PH_2016_02	Planned SVR CP S	SVR	2020-01-01	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	(Herrett Plans	Pinnarus - PH	_Unassigned	PH_2016_03	PH_2016_03	Planned SVR CP S	SVR	2020-01-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	(Herrett Plans	Pinnarus - PH	_Unassigned	PH_2016_FFT204	PH_2016_FFT204	Planned SVR CP S	SVR	2020-01-01	P	CASCADE FIELD		
TKA	Herrett	Herrett	820	A94003		94003	PH94I	94	Planned SVR CP S	SVR	2019-10-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94727		94727	PH94R	PH_2016_011	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94J	PH_2016_018	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94V	PH_2016_032	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94I	PH_2016_034	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94I	PH_2016_02	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94Q	PH_2016_04	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94G	PH_2016_07	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94727		94727	PH94R	PH_2016_026	Planned SVR CP S	SVR	2019-07-01	P	CHRISTIAN SHEA		
TKA	Herrett	Herrett	820	A94728		94728	PH94E	PH_2016_038	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94728		94728	PH94F	PH_2016_041	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94728		94728	PH94G	PH_2016_042	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94728		94728	PH94D	PH_2016_013	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94728		94728	PH94E	PH_2016_014	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A94728		94728	PH94L	PH_2016_035	Planned SVR CP S	SVR	2019-04-01	P	JILL GAYNER		
TKA	Herrett	Herrett	820	A95789		95789	MD87I		Planned SVR CP S	SVR	2019-04-01	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	A95789		95789	WL8TU		Planned SVR CP S	SVR	2019-04-01	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	A95760		95760	MD87P		Planned SVR CP S	SVR	2019-04-11	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	A95760		95760	WL87T		Planned SVR CP S	SVR	2019-04-01	P	DAVID LISHMAN		
TKA	Herrett	Herrett	820	A95760		95760	MD87N		Planned SVR CP S	SVR	2019-04-01	P	DAVID LISHMAN		

Totals: 40 rows

Query Builder Tips:

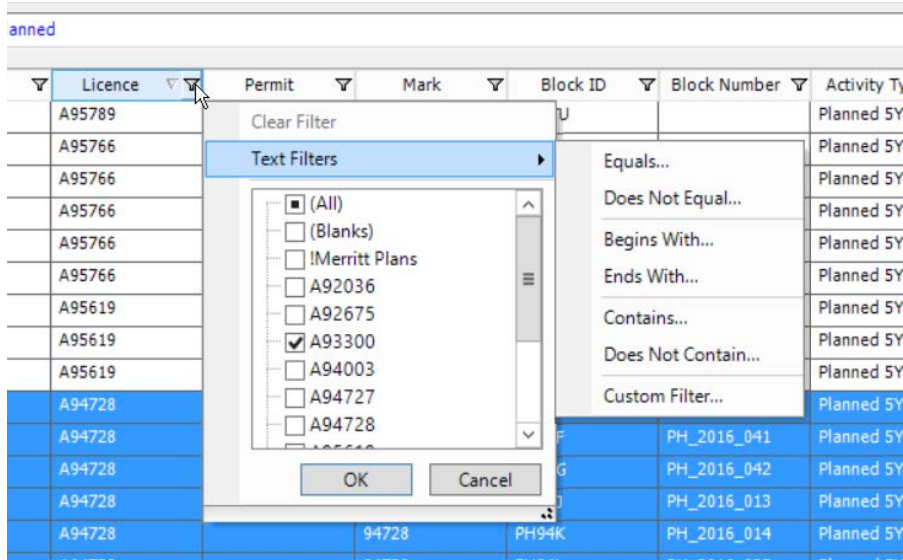
You can sort on any field in the query results by clicking the column header once to sort ascending and twice for descending.

Licence
A95789
A95766

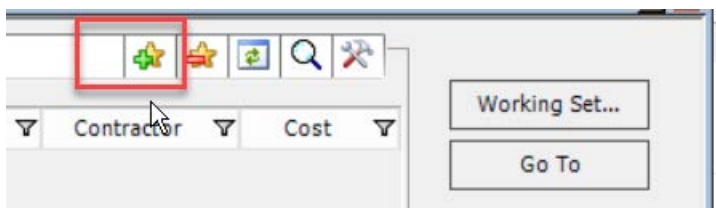
Right-clicking anywhere in the query results table and choosing AutoFilterEnabled will make the fields filterable so you can choose only desired values.

Planned

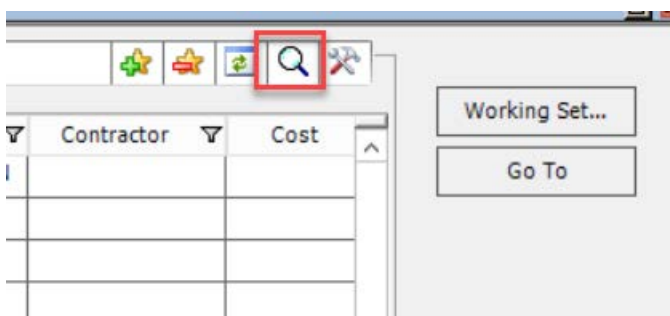
Licence	Block ID	Block Number
A95789	WL8TU	
A95766	TN8Y6	TN_2016_FFT
A95766	TN9DP	TN_2017_06
A95766	TN9DR	TN_2017_08
A95766	TN9DS	TN_2017_09
A95766	TN9DT	TN_2017_01
A95619	PH94N	PH_2016_01
A95619	PH94R	PH_2016_06
A95619	PH94T	PH_2016_08
A94728	PH8YB	PH_2016_038
A94728	PH8YF	PH_2016_041
A94728	PH8YG	PH_2016_042
A94728	PH94J	PH_2016_013
A94728	PH94K	PH_2016_014
A94728	PH94L	PH_2016_035



To save a query as a favorite to make it easier to find in the list later, click the Add to Favorites button icon in the top right corner of the QB window:



To modify the parameters of an existing query or make a new query, click the magnifying glass icon in the top right corner of the QB window:



If you have a short list of blocks/licences you want to query out you can use the Licence or Block ID field and change the Operator to In and then click the ... button to the right of the Values(s) field:

Order	Name	Operator	Value(s)	Prompt	Visible
1	Business Unit:	=	TKA	☒	☒
3	Management Unit:	=		☐	☒
4	Field Team:	=	Merritt	☒	☒
5	Tenure:	=		☐	☒
6	Licence:	=	In	☐	☒
7	Permit:	=		☐	☒
8	Mark:	=		☐	☒
9	Block ID:	=		☐	☒
10	Block Number:	=		☐	☒

Choose each block/licence you want to include in your query from the dropdown list to build your list and click OK:

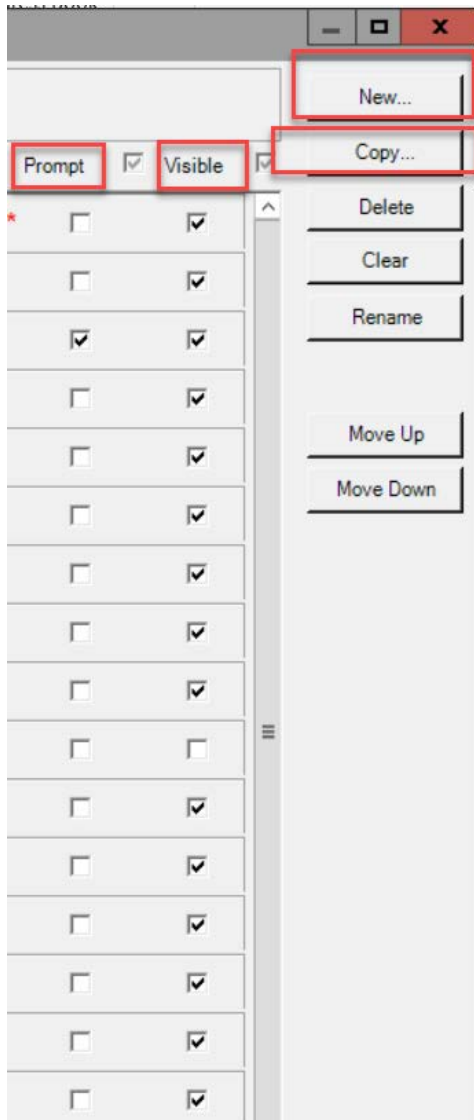
NOTE: You may need to change some of the other default query parameters when you choose this option or your query may not return any results (ie the blocks you have listed don't have activities in the default date range).

To save a copy of the query so you can save your changes click the Copy.... button and name your query (click the Shared box at the top if you want others to be able to see your query).

To create a new query from scratch click the New... button and name your query and set your own parameters (click the Shared box at the top if you want others to be able to see your query).

Fields with the Prompt box checked will prompt the user to input values each time the query is run.

Fields with Visible box checked will be visible in the query table. If you don't want to see a field you can uncheck the Visible box to hide it from your query results.

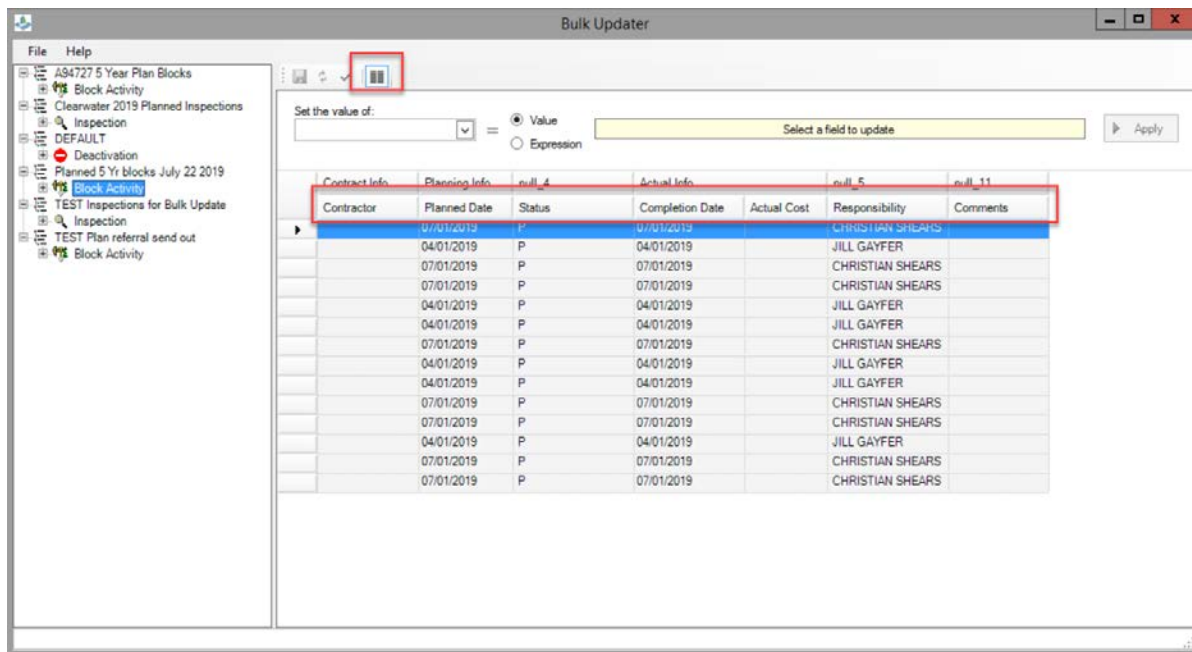


7. Right-click anywhere in the table and choose Select All Rows. Alternatively, if you only want to use certain records and not all, individually select the records you want to include using the Cntrl key to select multiple records.
Once you have selected all the records you want to include, click the Working Set... button at the top right of the QB window. **The working set will only include the records highlighted in blue.**

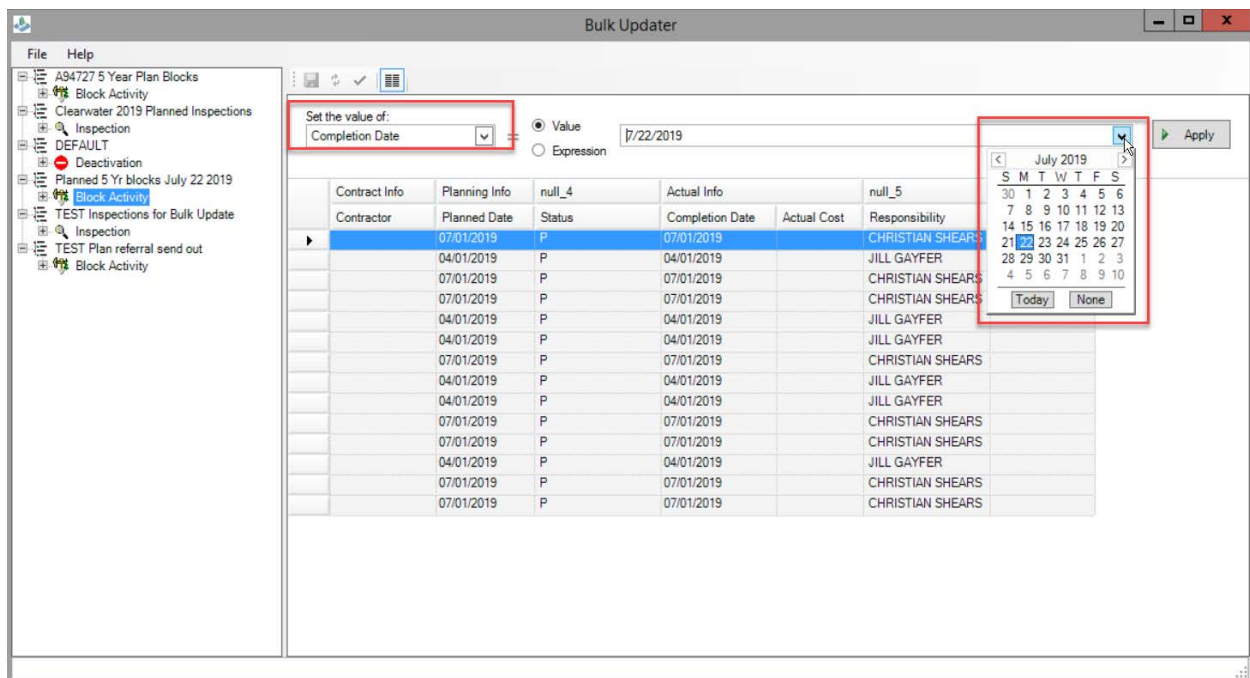
11. Choose the Block Activity node under the working set containing the records you want to update on the left:

The screenshot shows the 'Bulk Updater' application. On the left, a tree view lists various data sources. The 'Block Activity' item under 'Planned 5 Yr blocks July 22 2' is selected and highlighted with a red rectangle. The main window displays a table with the following columns: null_1, Task, Activity Type, Contract Info (sub-columns: Project Name, Contract ID, Contractor), null_12, Attachments, and null_15. The first row of the table is highlighted in blue. Above the table, there is a configuration section for setting values, including a dropdown menu, radio buttons for 'Value' and 'Expression', a text input field labeled 'Select a field to update', and an 'Apply' button.

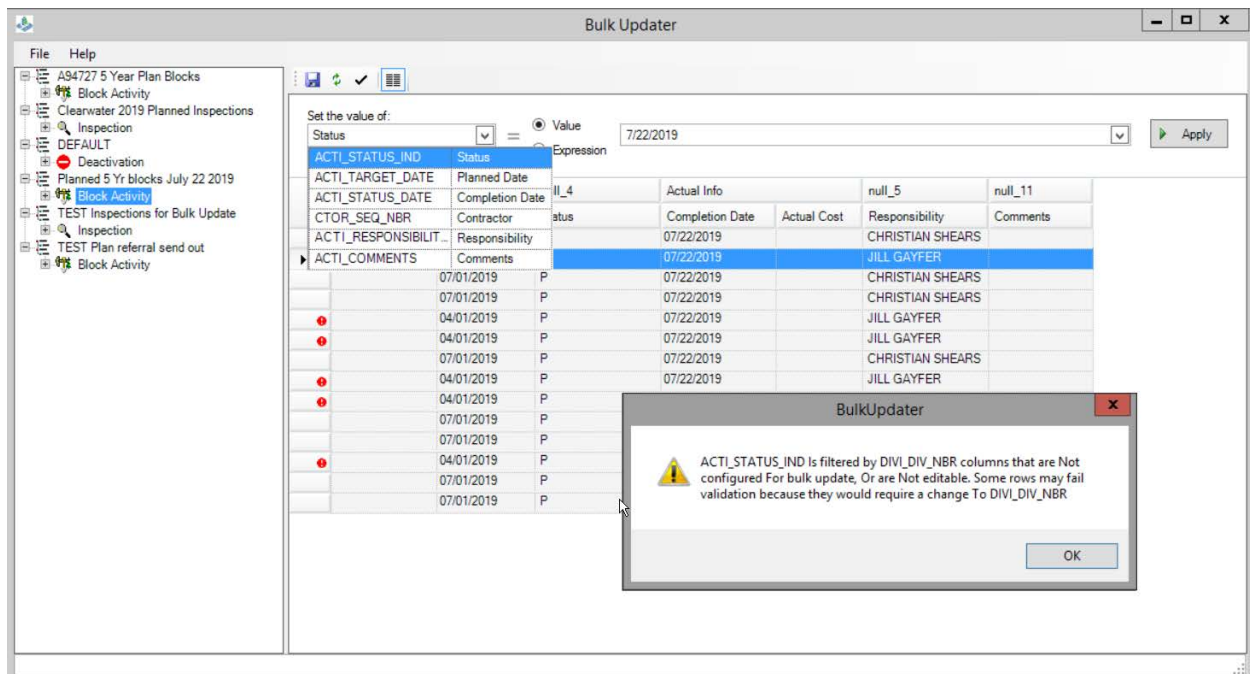
A table will be displayed with all of the block activity records from your working set. To display only the fields that are available to be updated using this tool, click the table button at the top of the window:



12. Choose a field from the *Set the value of* dropdown and select a value from the dropdown to the right (date fields will display a calendar to select a date):

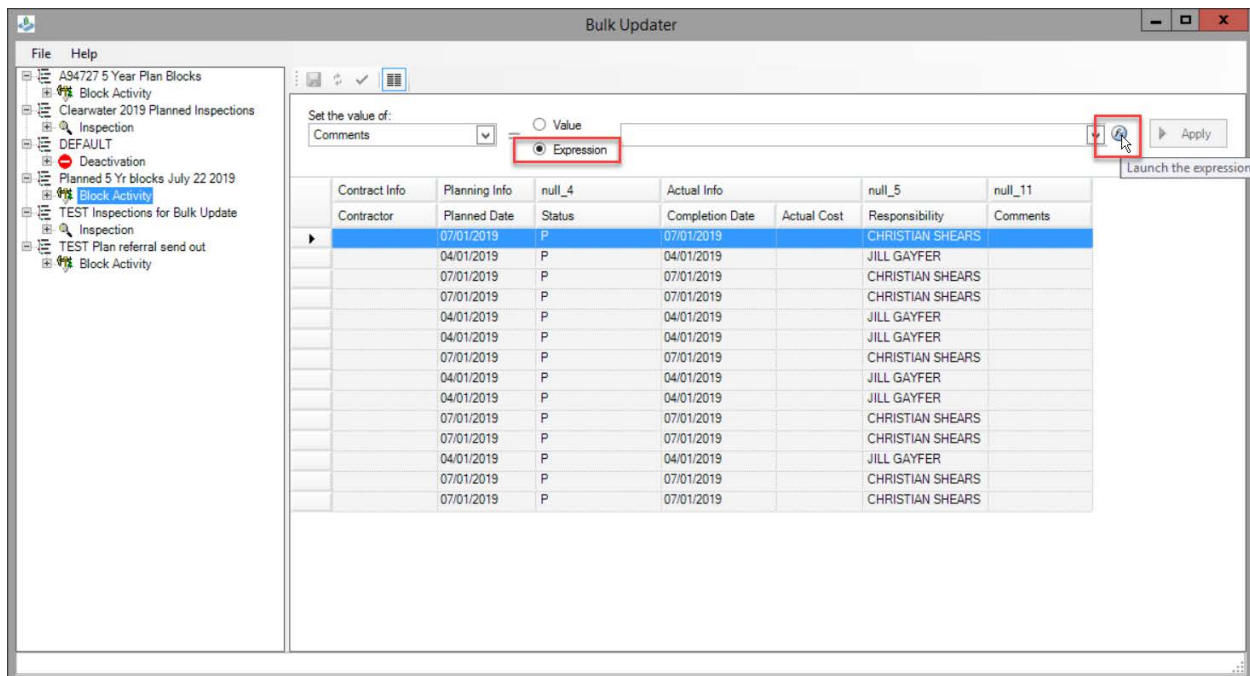


NOTE: When you choose the Status or Responsibility fields from the Set the value of dropdown it will throw an error as shown below. Click OK to continue and choose a Value from the dropdown and it will actually proceed to update the Status field despite this error message:

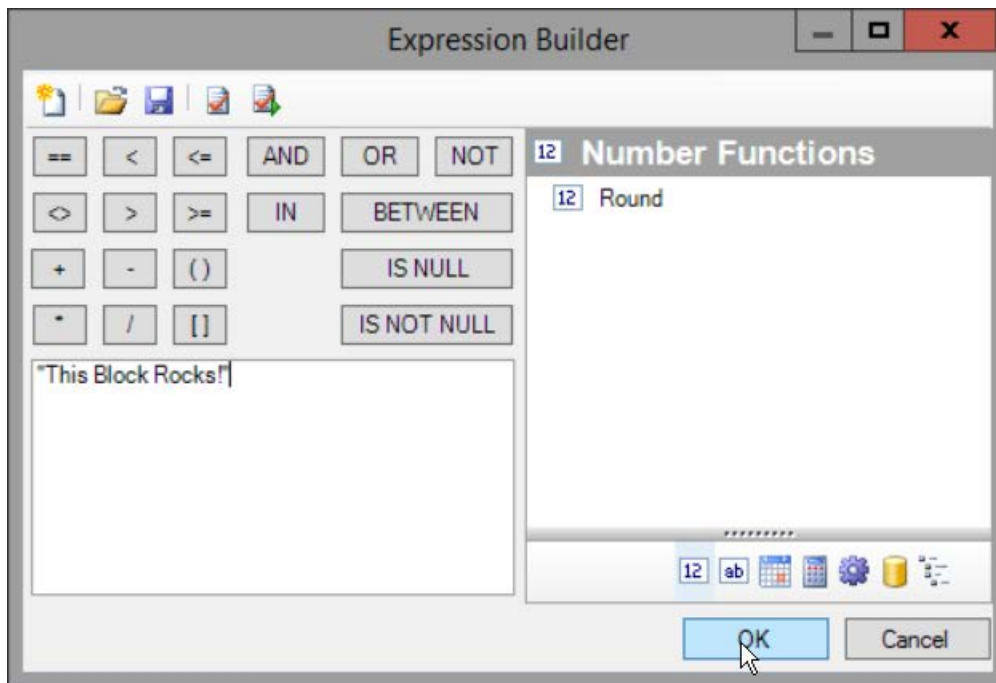


To update the Comments field or other fields that are freeform text fields (not dropdown values), you must use the Expression option.

Choose the Expression radio button and then click the fx expression builder button to the right of the dropdown box:

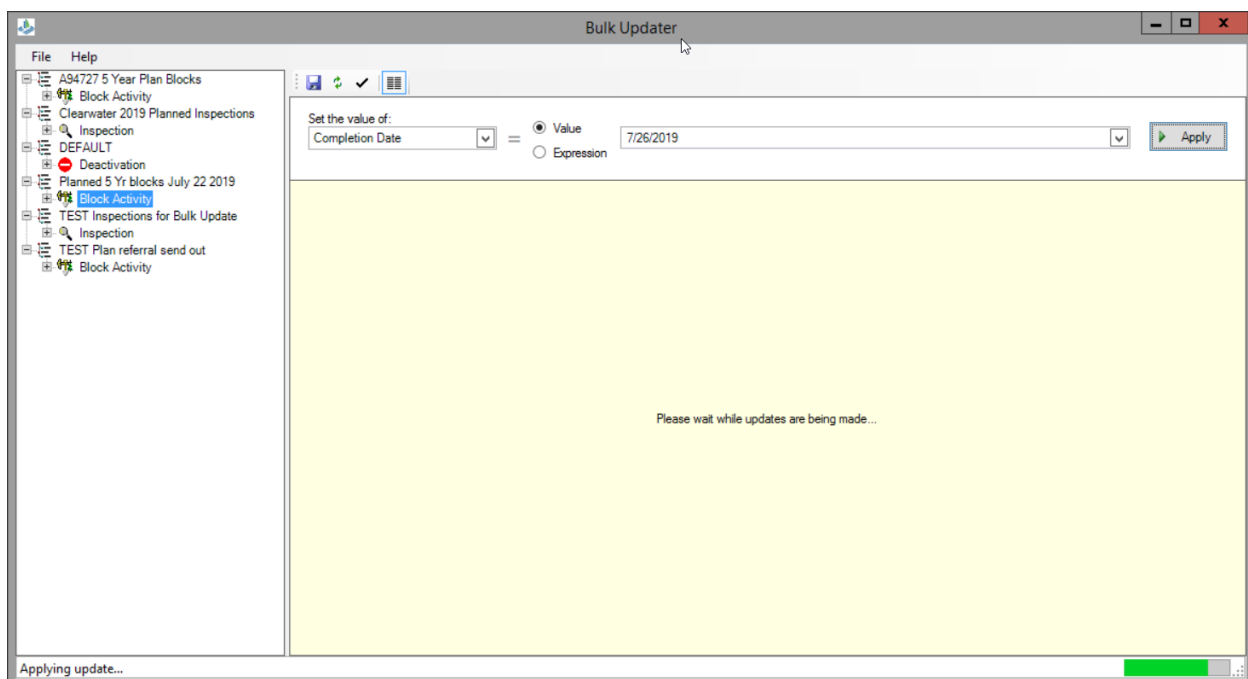


Type your desired comments into the white space below the operators making sure to encase them in double quotes and then click OK:



13. Click Apply to preview your changes in the table:

NOTE: Clicking Apply does not update the fields in the database yet, it only displays them to your screen for your review. The changes will only be posted to the database once you hit the Save button at the top. This step may take a few minutes depending on how many records you have in your working set.



Review the table and address any errors that are displayed. Errors are indicated by a red exclamation mark symbol to the left of the row. Double-click the symbol to display more information about the error.

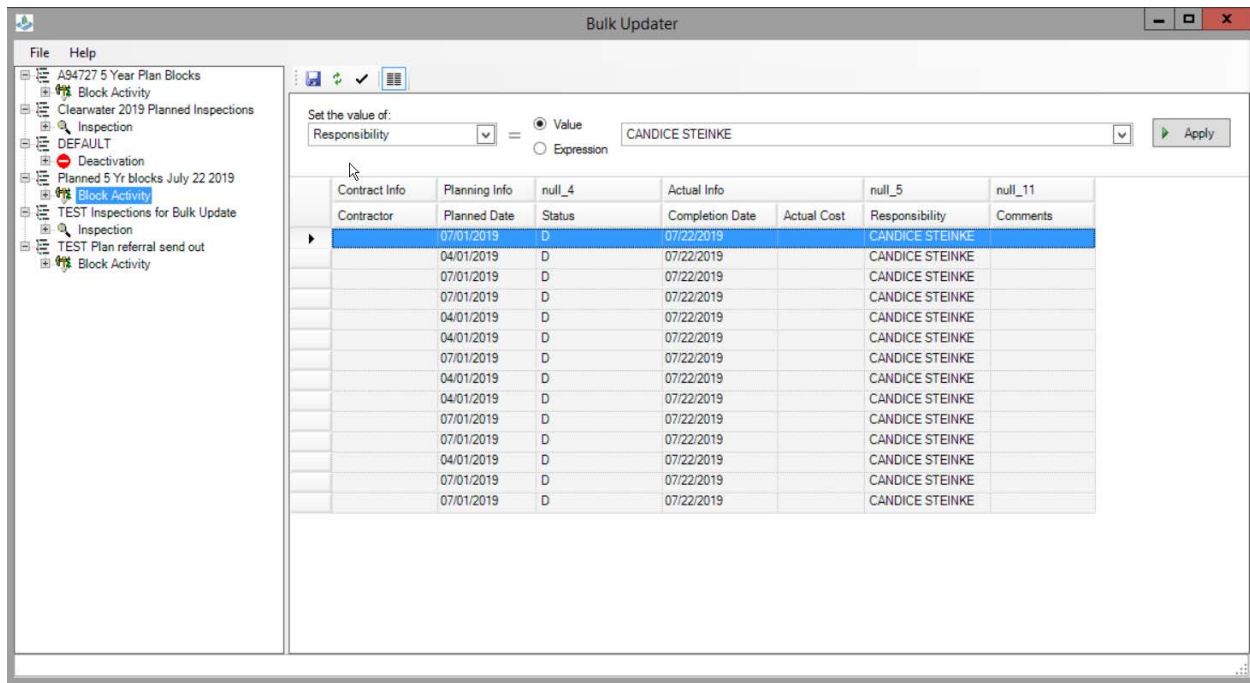
The Bulk Updater application window shows a table with the following columns: Contractor, Planned Date, Status, Completion Date, Actual Cost, Responsibility, and Comments. The table contains 12 rows of data. The first row is highlighted in blue. The second row has a red exclamation mark in the left margin. The third row has a red exclamation mark. The fourth row has a red exclamation mark. The fifth row has a red exclamation mark. The sixth row has a red exclamation mark. The seventh row has a red exclamation mark. The eighth row has a red exclamation mark. The ninth row has a red exclamation mark. The tenth row has a red exclamation mark. The eleventh row has a red exclamation mark. The twelfth row has a red exclamation mark.

Contractor	Planned Date	Status	Completion Date	Actual Cost	Responsibility	Comments
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!
	04/01/2019	P	07/26/2019		JILL GAYFER	This Block Rocks!
	07/01/2019	P	07/26/2019		CHRISTIAN SHEARS	This Block Rocks!

The Bulk Updater application window shows the same table as the previous screenshot. The second row is highlighted in blue. A red exclamation mark is visible in the left margin of the second row. An error dialog box is open, displaying the following message: "Error PreSave... The specified value for ACTI_RESPONSIBILITY is not valid".

Contractor	Planned Date	Status	Completion Date	Actual Cost	Responsibility	Comments
	07/01/2019	P	07/22/2019		CHRISTIAN SHEARS	
	04/01/2019	P	07/22/2019		JILL GAYFER	
	07/01/2019	P	07/22/2019		CHRISTIAN SHEARS	
	07/01/2019	P	07/22/2019		CHRISTIAN SHEARS	
	04/01/2019	P	07/22/2019		JILL GAYFER	
	07/01/2019	P	07/22/2019		CHRISTIAN SHEARS	
	07/01/2019	P	07/22/2019		CHRISTIAN SHEARS	

In the case shown above the error has occurred because the Responsibility field contains a name that is no longer in the database. In this case to resolve the error, you will need to update the Responsibility field to a name that is available in the dropdown list for that field.



You will not be able to save your changes and update the database until all of the errors have been resolved.

14. Once you have confirmed the results and have no errors, click the Save button at the top of the window to save your changes to the database (**this is the point of no return so make sure the data on the screen looks correct!!**)

