



## *NEWSLETTER #6*

### *JANUARY 27, 2004*

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Welcome to newsletter #6. It's a doosey weighing in at 10 pages. This week we're talking about the new **Mass Edit Wizard**.

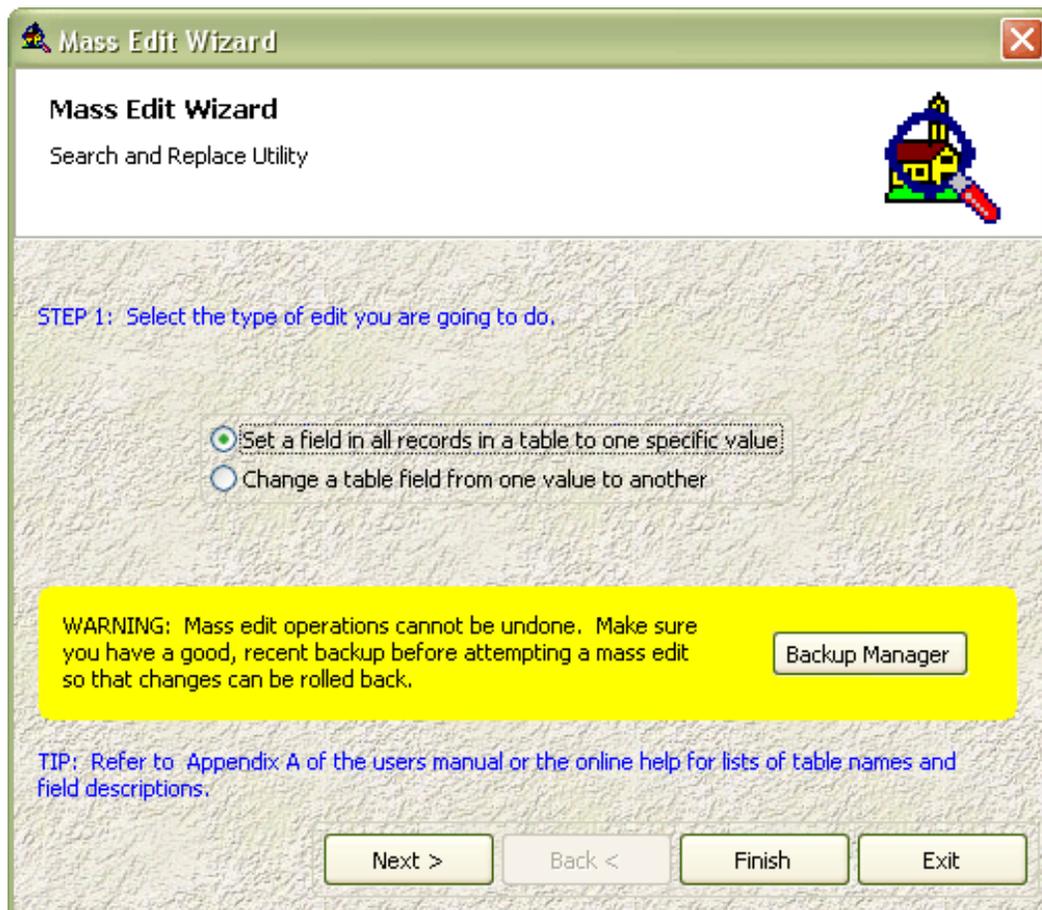
The idea behind the Mass Edit Wizard is to give you a way to change a large amount of data with very little effort. Now we need to pause for a moment. Did you catch it? A **LARGE** amount of data with very **LITTLE** effort. For certain, the Mass Edit Wizard gives you enough leeway to get yourself into a lot of trouble. This is not for everyone, and in fact the Mass Edit Wizard is accessible only from the "admin" account when security is turned on. Non-admin users cannot use this feature. But don't panic, read on.

Now I hope I didn't scare anyone too much. The Mass Edit Wizard is actually quite simple to use and can be very useful. It can save hours, days, even weeks worth of effort in just a few seconds. This utility is very much like a global find and replace like you would do in a word processor only a lot more powerful. The idea is that you give the wizard a few rules, tell it what you want to change and in what table, and viola, it's done throughout the data table. You can even create conditions like "Change the country to 'Canada' in all records but only if the country is currently set to 'Mexico'"

Savvy users will still have some alarm bells going off at this point. Certain fields in the ChurchWatch tables represent links to other tables. For example person ID, set by the Membership Manager, is used in other tables whenever a person is involved - for example in the Giving table. So obviously, changing the person ID field in the PEOPLE table would be a bad thing to do because it would break all the links in the Giving Table and anywhere else person ID is used. Have no fear. Certain fields in certain tables are considered "**protected**" fields and the Mass Edit Wizard will not allow you to modify these.

So lets take a look at the Mass Edit Wizard and walk through a real-life example.

This is an actual example that occurred just this week. One of our new perSEY converts converted their perSEY data into ChurchWatch data using the Import Utility (UPGRADE.EXE). Although this church is located in Canada, the import utility set the country field in the Membership Manager to 'USA' for all people in the database. I expect what happened is that the province/state field was either set incorrectly or not at all. Whatever the reason, without going through hundreds or thousands of records changing the country to "CANADA" one at a time, how do we deal with this mess? Of course the answer is the Mass Edit Wizard (good guess!). Lets begin by launching the Mass Edit Wizard from the top-of-screen menu, EDIT->MASS EDIT. Remember that you need to be logged in as "admin" or have security turned off completely. The wizard form will appear:



Welcome to step #1. Note the warning in yellow. It would be a **really** good idea to perform a backup at this point before you do anything. Mass Edit operations cannot be undone so you'll want a backup you can roll back (restore) to. So assuming you've done a backup lets continue.

Notice in step 1 that you have 2 options: To set a field in all records in a table to one

specific value or to change a table field FROM one value TO another (a replace). In the first case we are just setting a field to a specific value for all records in the table of choice. In the second case we are being more selective and changing a table field from one value to another. For our first example, we just want to set all country fields to "CANADA". So you would choose the first option. Click the NEXT button to move on.



And welcome to step 2. Next we need to tell the Mass Edit Wizard which table we want to work on. Don't panic. There is a list of tables in Appendix A of the User's Manual. In this case we are interested in the HOUSE table because the HOUSE table contains addresses and more specifically, the COUNTRY field we want to change. So pull down the list and select the HOUSE table. Then click NEXT.



Next, we need to tell the wizard what fields we want to modify. The wizard will automatically fill out the list in step 3 with non-protected fields from the HOUSE table (or from whatever table you selected in step 2). For our example we select the COUNTRY field and then click the NEXT button to move on.



In step 4 the wizard needs to know what the new value for the field (in all records) should be. So in this example we enter CANADA. At this point we've entered everything we need to. However, you'll notice that the NEXT button is still accessible. You might recall that we said the first option, back in step 1, allowed you to change all records in a table. That was mostly true. However, you have two choices at this point. You can click FINISH and you will see a confirmation message as shown below. Click



YES to make the changes or NO to cancel. In our example, we would probably click FINISH at this point, click YES and the country would be changed to CANADA in all records.

You have a second option available that complicates things a bit. You can click NEXT and you'll see step 5. In step 5 you can either perform the change on all records (same as clicking the FINISH button) or we can set a condition to apply the change only to a specific set of records. Lets look at this second option which is a little more complicated.

In step 5 you will see the form shown below.

The screenshot shows the 'Mass Edit Wizard' dialog box. The title bar reads 'Mass Edit Wizard' with a close button. The main title is 'Mass Edit Wizard' and the subtitle is 'Search and Replace Utility'. A small house icon with a magnifying glass is in the top right. The main area contains the text: 'Step 5: Apply to what records? Set a filter if desired or choose 'All Records''. Below this are two radio buttons: 'All Records' (which is selected) and 'Set a Condition'. At the bottom, there is a 'TIP' and four buttons: 'Next >', 'Back <', 'Finish', and 'Exit'.

Leaving this option set to “All Records” and clicking FINISH is no different from what we’ve already done. Click the “Set a Condition” option and things get more interesting. You’ll see the form shown below:

The screenshot shows the 'Mass Edit Wizard' dialog box with the 'Set a Condition' radio button selected. A blue arrow points to the 'Set a Condition' option. Below the radio buttons, the text 'Field Type: Fixed Numeric' is visible. The 'WHERE:' section contains three fields: 'Table Field:' with a dropdown menu showing 'FAMILY\_ID', 'Operation:' with a dropdown menu showing 'Equals', and 'Value:' with a text box containing '0' and a 'Values' button. At the bottom, there is a 'TIP' and four buttons: 'Next >', 'Back <', 'Finish', and 'Exit'.

This is where the Mass Edit Wizard becomes quite powerful. By using a “condition” we can pre-determine what records we want changed. So instead of blindly changing all the records in our HOUSE table, maybe we should be a bit more careful and change only those records that were set to “USA” for a country. Who knows, maybe we’ve got a “Mexico” in there somewhere.

This step is quite similar to setting a filter. The first item you must set for the condition is the field you want to compare to. This can be any field in the HOUSE table you want, not limited to the COUNTRY field. For example, we could change the country for all family names that start with “W”. I don’t know why you’d want to do that but you get the point. So begin by setting the table field. For the example being described here we would set the field to “COUNTRY”.

Next, chose an operation. There are lots to choose from. Pull down the list and see for yourself. But in this example a simple “EQUALS” will suffice.

Finally, set the value to compare to. In this example we would set the value to “USA”. One thing to note is that the value field(s) is/are smart. The wizard knows the type of the field you have chosen. In this case the field COUNTRY is a character field - it consists of alphanumeric characters. So the value field will change to type “character” and will resize accordingly. If you chose a date field, it’s a date and so on. When you pick an operation of “IS BETWEEN” you get two value fields and so on. I may be losing you at this point but suffice it to say the value fields will accept the proper values for what you’re trying to do.

So in summary, we’ve entered **COUNTRY**, **EQUALS** and **USA**. In other words we want to change only those records in the HOUSE table where the COUNTRY field is currently set as USA. Sounds right.

The resultant fields on the form are shown in the next figure.

**Mass Edit Wizard**  
Search and Replace Utility

Step 5: Apply to what records? Set a filter if desired or choose 'All Records'.

All Records  Set a Condition

Field Type: String

**WHERE:** Table Field: COUNTRY

Operation: Equals  Match Case

Value: USA

TIP: Refer to Appendix A of the users manual or the online help for lists of table names and field descriptions.

There are times when options may appear in this step depending on the type of field. In this example, because COUNTRY is of type character, the “Match Case” checkbox appears. In most cases (no pun intended), you will want to leave this unchecked because we don’t care if its “USA”, “usa” or even “uSa”. We’re not interested in upper or lower case. There may be times when you do care but not in this example.

There is another interesting option on this form and that’s the VALUE button. Click this button to see a list of all current, unique, values for the COUNTRY field. Now just think about that for a moment. This isn’t a bad test anyway. If we click the VALUES button we may have noticed that “MEXICO” is in the list. Hmm, we say, setting ALL records to “CANADA” would have been a bad idea and would have made for a very bad day. We may not even *notice* the error until months later. When you click the VALUES button a list of current, unique values for the field you have chosen in the condition is displayed. Then you can select “USA” and you don’t have to type anything. The value field is set for you.

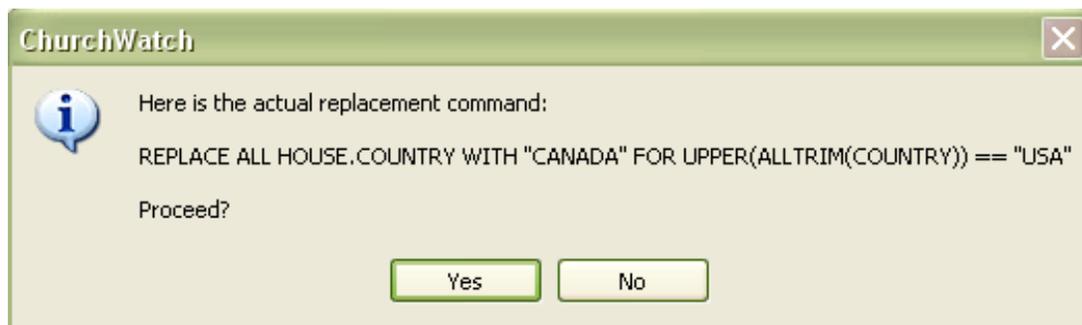
OK, lets review. Going back to step 1, we have asked the Mass Edit Wizard to change the **COUNTRY** field in the **HOUSE** table to “**CANADA**” where the **COUNTRY** field

currently **EQUALS "USA"**. You can click the BACK button repeatedly to go back through the steps and make sure you've got it all right. You won't lose any data entries when clicking BACK.

Finally, click the FINISH button. Now here's the cool part. The Mass Edit Wizard will confirm what you're doing in plain English. Something like this:



If you like what you see, click YES, otherwise click NO. If you click YES, the wizard will confirm things one last time by showing you the actual programming command that is about to take place. This is probably not of interest to most people but you can read the command and it should make at least a small amount of sense.



Again, click YES to proceed or NO to cancel. The Mass Edit wizard will report the number of records that were modified if you click YES. You're done.

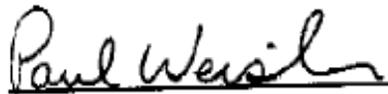


Once the edit is complete you might want to check some of your country fields to make sure the edit did what it said it was going to do.

Now remember way back in step #1, there was a second type of mass edit - that is, changing a field value FROM one value TO another value. You will find the process very similar and there is no need to go into detail here in the Newsletter. This second option does allow you to set a "compound" filter because you have 2 conditions to worry about. 1) the FROM/TO values (this is new) and 2) the end condition that we've already talked about in the example above. This can be quite powerful because you can combine conditions. For example, we could change FROM "USA" TO "CANADA" but only where the city equals "CALGARY". This compound filtering can help you handle some complex situations as you can well imagine.

## **Remember to always do a backup first!**

That's it for newsletter #6. Be sure to keep your email address up to date with us and be sure to upgrade your software via the internet from time to time. It can save us both some time and effort.

A handwritten signature in black ink that reads "Paul Weisberg". The signature is written in a cursive style and is underlined.

Paul Weisberg  
White Mountain Software