

Bulkmanager User manual



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1 Introduction

Bulkmanager helps you search content, media and members in Umbraco on various criteria and allows you to use bulk operations on selected items. It also allows you to export Selected content to CSV or Excel.

Bulkmanager is compatible with Umbraco version 7.7 and up. Bulkmanager is compatible with SQL Server (Express) only.

1.1 Installation

Install the Bulkmanager package using the Umbraco package installer. Or using Nuget

Make sure that the installer has modify rights on the following folders:

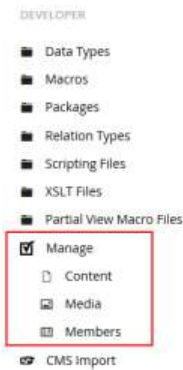
- /bin
- /app_plugins

If for some reason you can't give the installer these rights, you can install the package manually. Read the chapter manual configuration how to do this.

Once the package is installed you have an extra folder in your developer section called Bulk manager. You might need a page refresh to see this folder.

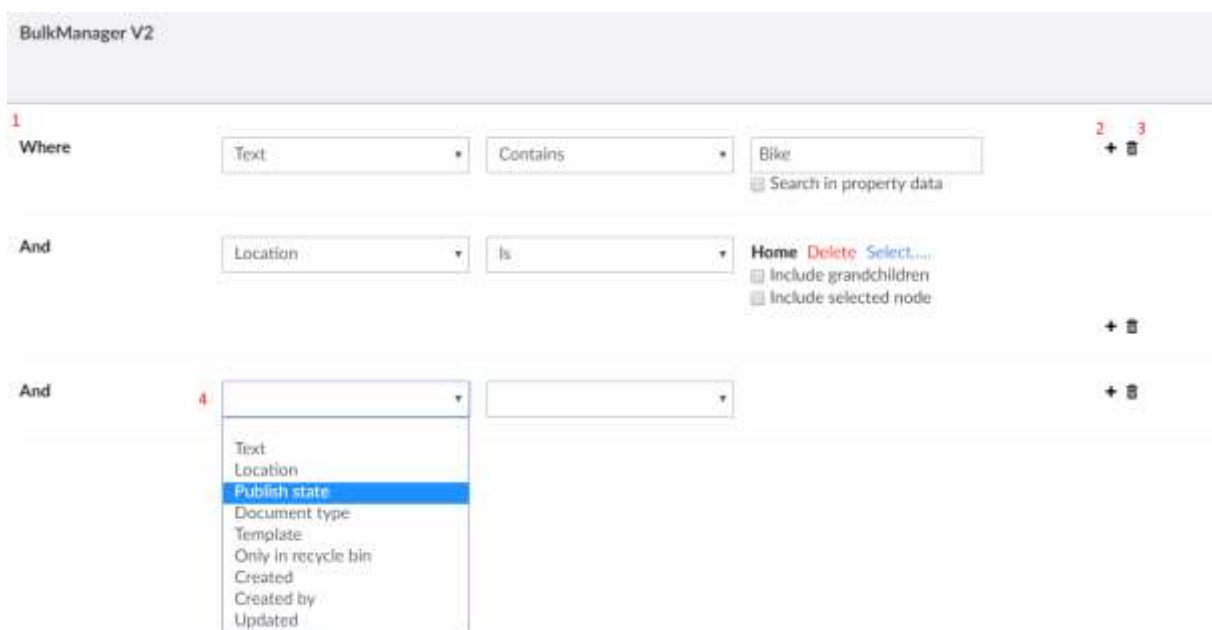
2 Using bulk manager

In the developer section you see the new “Manage” tree open this tree and you will see the following items¹. Click on the item you want to manage



2.1 Query data

Querying data is really simple select the fields you want to query on and fill in the criteria options.



1. Current filter criteria you want to use to query the data.
2. Click the plus sign to select extra filter criteria.
3. Click on the trash icon to remove criteria.
4. Add additional filter option

¹ When you don't have a license you will only see the content item

2.2 Overview

When you select “Search” the following overview will be shown

The screenshot shows the BulkManager V2 interface. At the top, there is a header 'BulkManager V2'. Below it, there is a 'Select columns' button (1) and an 'Actions' button (4). The main area contains a table with the following columns: Name (2), Publish state, Document type, and Created. The table lists several documents, including 'Home', 'Products', 'Bike Jacket', 'Tennis', 'Unicom', 'Pine Paper Bag', and 'Basket Bag'. A context menu is open over the 'Created' column, showing options: Publish, Unpublish, Copy, Move, Change document type, Assign template, Delete, and Delete versions.

1	2			
Name	Publish state	Document type	Created	
Home	Published	Home	1/9/2019 11:09	<ul style="list-style-type: none"> Publish Unpublish Copy Move Change document type Assign template Delete Delete versions
Products	Published	Product	1/9/2019 11:09	
Bike Jacket	Published	Product	1/9/2019 11:09	
Tennis	Published	Product	1/9/2019 11:09	
Unicom	Published	Product	1/9/2019 11:09	
Pine Paper Bag	Published	Product	1/9/2019 11:09:05 AM	
Basket Bag	Published	Product	1/9/2019 11:09:05 AM	

1. Select/Deselect all items.
2. You can sort every column. Just click on the name of the column. When you click twice the column will be sorted in descending order
3. Select additional columns.
4. When you have selected all the items you want to apply the bulk action on you can select the action from the actions menu.

2.3 Select additional columns

When selecting the “Select columns” option the dialog below will open. Select all the items you want to display and choose the “Ok” option to add them to the overview.

Select columns

- Id
- Udi
- Name
- Publish state
- Document type
- Created
- Created by
- Updated
- Updated by
- ApiKey
- Content

2.4 Execute bulk action

When you have selected the action a dialog will appear where you need to confirm the bulk action. When you have confirmed the bulk action it will execute. Cancel the bulk action will close the dialog.

2.5 Save search criteria

When you need to repeat bulk tasks with the same criteria (for example bulk publish all unpublished pages) several times, you can use the save option to save the search criteria in its current state to the database. Just press the save option in the pull up menu on the Bulkmanager page.

2.5.1 Save options

BulkManager V2

1
Save as

Save search criteria into the database, so you can use them directly the next time you need to query the same data.

Unpublished data

2
Immediately show data

When enabled data will be shown directly when the user opens this search form

3
Only for me

When enabled this search form will only be visible for me in the tree.

1. Name as shown in the tree
2. When selected the data will be shown immediately when opening the saved item without the user having to use the search button.
3. When checked the saved item is only visible for the person who saved the definition.

2.5.2 Saved definitions in the tree

After save you will see the saved criteria in the menu tree.

- Manage
 - Content
 - Unpublished data
 - Media
 - Members

2.6 Export data

When you select Export on the pull-up menu on the Bulkmanager page you will see the following dialog with export options.

Export

Export items from Umbraco. All data based on criteria and the selected columns in the overview will be exported.

Export as



The image shows a dropdown menu titled "Export as". The menu is open, displaying three options: "Excel file", "Excel file", and "Csv file". The first "Excel file" option is highlighted with a blue background, indicating it is the selected option. A small downward-pointing triangle is visible on the right side of the first "Excel file" option.

When you select Export an Excel, or csv file is created based on the columns and criteria you selected in the overview. Exporting data will not use paging, it will export all the records.

3 Manual Installation/Configuration

If you can't give the installer sufficient rights to create tables in the database, or the sufficient rights to modify the following folders /bin/, /app_plugins you need to install Bulkmanager manually.

3.1 Manual installation of files

- Open the folder in the package zip file.
- Copy all **.dll** files to the /bin/ folder.
- Create the following folders
 - o /app_plugins/BulkManager
 - o /app_plugins/BulkManager/backoffice/bulkmanager
 - o /app_plugins/BulkManager/css
 - o /app_plugins/BulkManager/dialogs
 - o /app_plugins/BulkManager/fields
 - o /app_plugins/BulkManager/css
 - o /app_plugins/BulkManager/images
 - o /app_plugins/BulkManager/lang
- Copy all ***.css** files to the /app_plugins/BulkManager/css folder
- Copy all ***.png** files to the /app_plugins/BulkManager/images folder
- Copy package.manifest to the /app_plugins/BulkManager folder
- Copy bulkmanager.js, bulkmanager.html, delete.html, manage.html to /app_plugins/BulkManager/backoffice/Bulkmanager
- Copy actiondialog.html, exportdialog.html, selectcolumns.html to /app_plugins/BulkManager/dialogs/
- Copy booleanfield.html, checkboxlist.html, dictionarypickertree.html, dropdownselector.html, fieldmapping.html, numericfield.html, picker.html, queryfilter.html to /app_plugins/Bulkmanager/fields/
- Copy booleanfield.html, checkboxlist.html, dictionarypickertree.html, dropdownselector.html, fieldmapping.html, numericfield.html, picker.html, queryfilter.html to /app_plugins/Bulkmanager/fields/
- Copy booleanfilterfield.html, checkboxlistfilterfield.html, datepickerfilterfield.html, dictionaryfilterfield.html, dropdownfilterfield.html, pickerfilterfield.html, textfilterfield.html to app_plugins/Bulkmanager/fields/filterfields/
- Copy ***.xml** to /app_plugins/Bulkmanager/lang/
- Run the script below to create the database table

```
CREATE TABLE [dbo].[BulkmanagerState] (
  [Id] [int] IDENTITY(1,1) NOT NULL,
  [StateId] [uniqueidentifier] NOT NULL,
  [Name] [nvarchar](150) NOT NULL,
  [ProviderId] [nvarchar](50) NOT NULL,
  [BindOnLoad] [bit] NOT NULL,
  [UserId] [int] NOT NULL,
  [state] [nvarchar](max) NOT NULL,
  CONSTRAINT [PK_BulkmanagerState] PRIMARY KEY CLUSTERED
  (
    [Id] ASC
  )WITH (PAD_INDEX = OFF, STATISTICS_NORECOMPUTE = OFF, IGNORE_DUP_KEY = OFF, ALLOW_ROW_LOCKS = ON, ALLOW_PAGE_LOCKS = ON)
)
```

- Add the following snippet to the /config/trees.config file.


```
<add initialize="true" sortOrder="9" alias="bulkmanagerTree" application="developer"
  title="BulkManager" iconClosed="folder.gif" iconOpen="folder_o.gif"
  type="BulkManager.Core.Umbraco.Trees.BulkManagerTree,BulkManager.Core" />
```
- Add the following snippet to the /umbraco/config/UI.xml file.


```
<nodeType alias="bulkmanagerTree">
  <header>Bulk manager</header>
  <tasks>
    <delete assembly="BulkManager.Core" type="Umbraco.Tasks.DeleteTask" />
  </tasks>
</nodeType>
```

If you purchase a license (.Lic) file. Put that in the Bin folder of your Umbraco install!

4 Troubleshooting

4.1 I don't see the Bulkmanager package in my developer section

Make sure you have sufficient rights to install the package. See chapter 2, otherwise perform a manual installation see chapter 5.

4.2 I can only manage content.

In case you want to use Bulkmanager for other items than content make sure you have a license.

4.3 I get an Invalid License exception.

Make sure you've bought the correct license for the (sub)domain, or an unlimited license and added the license file to the bin folder. Contact support@soetemansoftware.nl for help.

4.4 How can I select more query fields?

Use the + sign for more filter options.

4.5 I can't see the developer section.

Make sure you have enough rights to view the developer section in Umbraco. Contact your system administrator.