

## iMapInvasives Batch Edit Tool Instructions

### Quick details

- Located in the last tab in the filter tool
- For organizational admins, for data within their organization
- Limited to presence records only, up to 500 at a time.
- Tied to what is displayed in your map view (layers turned on/off, filters applied, zoom/extent, etc.).

**View tutorial at:** <https://meetny.webex.com/meetny/ldr.php?RCID=44d4a60b02fe10cfdcff25b75500c729>

*Note: this tutorial was recorded when the limit was 100; the limit has now been increased to 500.*

### Instructions

Use Case: *Review/edit up to 500 records from your organization to confirm verifiable records, add a project to certain set of records, or other similar tasks.*

1. Open the filter tab, and filter on the organization you administer (*to double check which organization this is, select Your Account from the main menu and scroll down*).
2. Continue to refine the data in your map view to include only records you'd like to review (turn layers on/off, add filter parameters like Date or species, pan/zoom, etc.).
3. Open the last tab in the filter tool, "Batch Edit".
4. Click **Load/Refresh Table**. If you get a red message saying there are too many records, adjust map to include less records (zoom in, add filter parameters, etc.), and re-click **Load/Refresh Table**.
5. Once a table appears, review the records in the table.
6. To edit a batch of records, select a field from the **Field to Change** dropdown, and fill out as appropriate.
7. Using the checkboxes in the first column of the table, check off any records where you want to make the edit specified above. **Please note that clicking a row will also automatically check the box.**
8. Click **Commit** to apply the changes.
  - You will see either a green success message, or a red error message (**you may have to scroll down on the table to see this**).
  - Clicking Commit applies the changes to the database, even though the information in the table will not change automatically. Click **Load/Refresh Table** to view these changes in the table.

### Tips & caveats

- **Check-off individual records carefully.** If you use the "Check All" button, be sure to carefully read through each row before clicking Commit. Also, please note that clicking on a row will automatically check the box.
- **There is no "undo" button** – if you believe you have made a mistake, please either correct it using the batch edit tool, or contact us to fix the issue. You can use the "Metadata" tab to filter on records last edited by you (or another user) within a certain date range.
- **This tool is limited to 500 records at a time.** Getting <500 records on screen can take some getting used to. Try adding additional filter parameters to split into more batches (e.g. filter on and edit June records first, then July records separately) or zoom in to do one area at a time.
- **Only 100 records can be displayed per page.** You are able to edit more than the 100 records displayed on a single page by either selecting all records (when more than 100 are filtered) or by manually selecting records on different pages. Review all records selected before committing any edits, including ones shown on other pages.
- **Hover over an image thumbnail to see larger photo** (click record link for full sized photo).
- **Sort the table by any field** (click on column header; then click the arrow icon).
- **Expose additional fields in the table** (click on column header, click the 3 dots, and toggle layers on/off).
- **The batch edit table is not live/dynamic** – to keep your table current, click *Load/Refresh* whenever you change your map view (pan, zoom, layers on/off) or edit the data.
- You may be able to load records in the table outside your organization, but it will not let you apply edits (after you click commit, a red message will appear – scroll down if you do not see it).
- Some editable fields have the option of **Replace** or **Append**.
  - The **replace** option will remove the current entry for that field, and replace with your specified edit (for example, removing an incorrect entry for a certain field and replacing it with the correct one).
  - The **append** will retain the original entry in the field for each record (if there is one) but add your specified edit. *Append is generally safer unless you know that want to remove the current entries for that field.*