



Module 7

Data Cleanup



Batch Edit

Query: Localities with Kansas in the name

Results: (300)

Batch Edit Create CSV Create KML Merge Records Create Record Set GeoMap Browse In Forms

Locality	Latitude1	Longitude1	Water Type	Locality - Remarks	Lat/Long Method	Locality - Datum	Locality - GUID	County - Full Name	State -
Kansas River	39.065700531	-94.7512969971	Freshwater				dec40d4d-25a7-4568-ad4b-d486a7c2a326	USA, Kansas, Wyandotte	USA, Kansas
Sugarloaf Creek Just W of Arkansas State Line on Hwy 83	34.9998016357	-94.4496994019	Freshwater				2db38308-0365-41f3-b2e9-081643d0524b	USA, Oklahoma, Le Flore	USA, Oklahoma
Arkansas River, 1.5 mi. below Keystone Dam	36.1394004822	-96.2230987549	Freshwater				cefc073b-3449-4d4b-99be-60ab2f5942d	USA, Oklahoma, Tulsa	USA, Oklahoma
Kansas River, 1.5 mi. below US Rt. 24-40 bridge at Lawrence	38.9702186584	-95.2097167969	Freshwater				a2ef7882-5d40-4c5b-9fa9-176d8416491c	USA, Kansas, Douglas	USA, Kansas
Arkansas River at Pierceville	37.8713888889	-100.6816666667	Freshwater	GEOLocate			3672e068-5024-4c2b-a12c-9885d4fbc59	USA, Kansas, Finney	USA, Kansas
Kansas River, mile 106.2	39.1211913	-96.0227853	Freshwater	GEOLocate			019c050a-33b0-4a5d-ba85-cea3426eb772	USA, Kansas, Wabaunsee	USA, Kansas
Kansas River Just Down Stream of Bowersock Dam	38.976126	-95.2339	Freshwater	GEOLocate			7378401e-5b06-4943-b7a5-a9d0940c0c16	USA, Kansas, Douglas	USA, Kansas
Kansas River, mile 147.5	39.1867149	-96.5281395	Freshwater	GEOLocate			6023b2bc-095b-4697-8cfe-b649aad09ba8	USA, Kansas, Pottawatomie	USA, Kansas
Kansas River	39.0541648865	-96.7772216797	Freshwater	Provided georef			2cca6f46-b1e1-4084-8c4e-930bf14478bc	USA, Kansas, Geary	USA, Kansas

Data Set: Localities with Kansas in the name

Meta Data Tools

Validate Results Commit Revert Save

Locality	Latitude1	Longitude1	Water Type	Locality - Remark	Lat/Long Method
1 Kansas River	39.065700531	-94.7512969971	Freshwater		
2 Sugarloaf Creek Just W of Arkansas State Line on Hwy 83	34.9998016357	-94.4496994019	Freshwater		
3 Arkansas River, 1.5 mi. below Keystone Dam	36.1394004822	-96.2230987549	Freshwater		
4 Kansas River, 1.5 mi. below US Rt. 24-40 bridge at Lawrence	38.9702186584	-95.2097167969	Freshwater		
5 Arkansas River at Pierceville	37.8713888889	-100.6816666667	Freshwater		GEOLocate
6 Kansas River, mile 106.2	39.1211913	-96.0227853	Freshwater		GEOLocate
7 Kansas River Just Down Stream of Bowersock Dam	38.976126	-95.2339	Freshwater		GEOLocate
8 Kansas River, mile 147.5	39.1867149	-96.5281395	Freshwater		GEOLocate
9 Kansas River	39.0541648865	-96.7772216797	Freshwater	Provided georef	
10 Kansas River, mile 137.5	39.1857315	-96.4285943	Freshwater		GEOLocate
11 Kansas River	39.0365962056	-94.8609967041	Freshwater		
12 Kansas River, mile 171.6	39.0606925	-96.8000381	Freshwater		GEOLocate
13 Sugar Creek, 10 mi. NNW of Fort Smith on Arkansas State Line	35.4948005676	-94.4494018555	Freshwater		
14 Kansas River	39.0512008667	-94.8069000244	Freshwater		
15 Kansas River	38.2013893127	-99.0030517578	Freshwater	Provided georef	
16 Kansas River	39.0074996948	-94.8994979858	Freshwater		
17 Kansas River, 10 mi. SW Oswego	37.0648498535	-95.2377319336	Freshwater		
18 Kansas River, 2.5 mi. S of Alden	38.233001709	-98.3000030518	Freshwater		
19 Cimarron River, 18.8 mi. S and 8.7 mi. W Meade on Kansas Route 23	37.0080413818	-100.4830169678	Freshwater		
20 Kansas River	39.0512008667	-94.8994979858	Freshwater		
21 Kansas River	39.065700531	-94.7698974609	Freshwater		
22 Arkansas River, 12 mi. N and 6 mi. E Stafford	38.2657012939	-98.4083023071	Freshwater		
23 Kansas River at I-435 bridge	38.0450973511	-94.7803672651	Freshwater		
24 Arkansas River near Howell	37.778600415	-100.1819992065	Freshwater		GEOLocate
25 Kansas River	39.0220985413	-94.8994979858	Freshwater		
26 Kansas River, mile 144.1	39.1689353	-96.49408865	Freshwater		GEOLocate

Search Replace Search Results (0 / 0) Modified Cells (0 / 0) New Cells (0 / 0) Updated Cells (0 / 0) Deleted Cells (0 / 0) Matched And Changed Cells (0 / 0) Error Cells (0 / 0)

- Add new information to or correct multiple records at once
- Standardize or correct grammatical and spelling errors
- Update fields to comply with Darwin Core standards
- Batch Edit is disabled for system tables and scoping hierarchy tables (e.g. audit log, division, collection, etc.).

No Change Principle



If you make no change to a record, Batch Edit will not create, modify, or delete anything in the database.



Before You Begin

- Create a backup of your database
- Understand the relationships involved
- Ensure you have the permissions required





Permission	Description
Create	Create new records in Batch Edit.
Update	Modify existing records.
Delete	Delete base records.
Commit	Commit the changes back to the database.
Rollback	Roll back a Batch Edit data set (experimental).
Validate	Validate the pending changes before committing.
Transfer	Transfer records between collections.
Create Record Set	Save the results of a Batch Edit as a new Record Set.
Delete Dependents	Controls whether dependent records can be deleted in Batch Edit.
Edit Multiple Tables	Controls whether related tables (relationships) are editable in Batch Edit. This preference only applies if “Edit Multiple Tables” permission is set.



Grid Navigation

The Validate button works similarly to that in the WorkBench. In addition, Batch Edit displays cell highlights for specific actions:



< Updated Cells (0 / 0) >

Cells with newly changed values are highlighted light blue.

< Deleted Cells (0 / 0) >

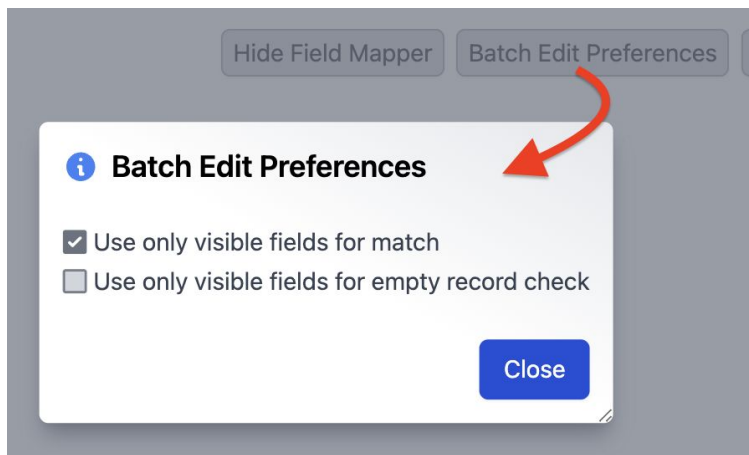
Cells where records are deleted and dependent cells are empty are highlighted orange.

< Matched And Changed Cells (0 / 0) >

Cells where a to-one independent record is matched to a different record than the current one are highlighted blue.



Batch Edit Preferences



Use only visible fields for match

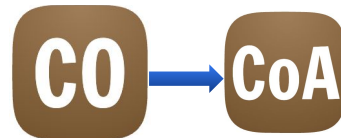
- **Enabled (default):** Visible (mapped) fields will be used for matching to existing records
- **Disabled:** Non-mapped fields will be considered for matching.

Use only visible fields for empty record check

- **Enabled:** A dependent record is deleted if mapped fields are empty and it has no child dependents.
- **Disabled (default):** All non-system fields in the record must be empty and it must have no child dependents.

Expected Behavior

One-to-one Dependent Relationship



Collection Object → Collection Object Attribute

Update	Create	Delete
Editing mapped fields directly updates the related record	If the related record does not exist and you enter non-empty values, a new record is created.	If mapped fields are cleared (i.e., made empty), Batch Edit will attempt to delete the related record only if: 1. All fields in the database for that record are empty (excluding system fields), according to the “empty record” preference. 2. The record has no dependents of its own.

Expected Behavior

One-to-many Dependent Relationship



Update	Create	Delete
Changes in mapped fields directly update the related records	If a related record does not exist and you enter data, it is created	If all mapped fields are cleared, Batch Edit will attempt to delete the related record only if: 1. All fields in the database for that record are empty (excluding system fields), as per the preference. 2. The record has no further dependents (e.g., Determination with linked Determiners).

Expected Behavior

Many-to-one Independent Relationship



Match	Clone	Unlink
If you enter values that match an existing record (according to matching preferences), the relationship is updated to link to the matched record.	If no match is found, a new record is created by cloning the existing related record and applying your changes. Any mapped dependents are also cloned; unmapped dependents remain unchanged.	Clearing all mapped fields removes the relationship from the base record, but does not delete the related record. The original related record remains in the system.

Expected Behavior

One-to-many Independent Relationship



Update	Create	No Deletion or Unlinking
Changes are applied to the related records.	If a related record does not exist and you enter data, it is created.	Clearing all fields does not delete the related record nor unlink the relationship.

Expected Behavior Trees



Update/Clone	(Any rank) Columns	Deletion
When editing tree paths (e.g., via a tree as base table), records are cloned for changes, not updated directly.	<i>Read-only</i> unless the base table is a tree.	Deletion of tree nodes is not performed via clearing fields; such columns are not editable as relationships.

Batch Edit: User Preferences



Batch Edit

Query

Reset

Number of records selected from the query

General

Reset

Enable relationships ☒

Allows batch editing relationships of the base table. Rollback is disabled when relationships are enabled

Show rollback button ☒

Rollback in Batch Edit is an experimental feature. This preference will hide the button

Enable relationships

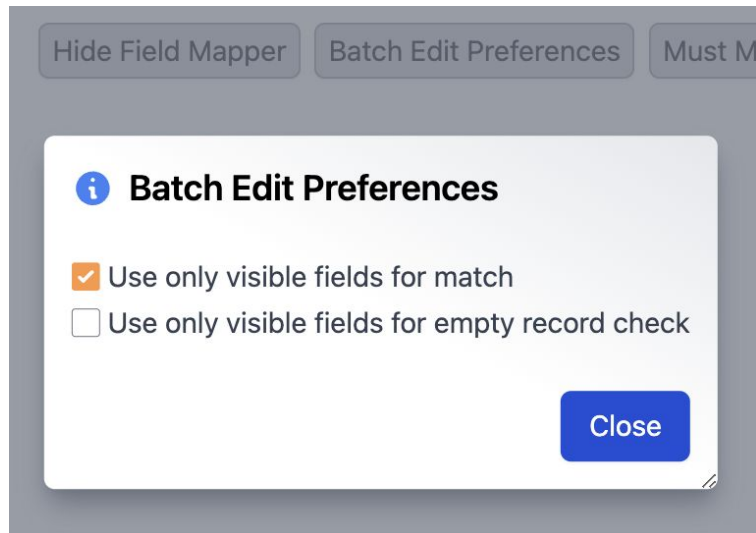
- If false, columns for relationships will be read-only.
- If true, relationships can be edited.

Show rollback button

- Controls visibility of rollback option in Batch Edit.
 - Requires **both** permission to rollback and 'Enable relationships' unchecked
- 

Batch Edit: Data Set Preferences

- **Use only visible fields for empty record check**
 - Controls whether deletion is based on mapped fields only or all fields
- **Use only visible fields for match**
 - Controls whether matching for to-one independents uses just mapped fields or all fields





Record Merging



Record Deduplication/Merging

Query Results: Agent    << < 1 / 5 > >>

Agent Type Person Title Mr.

Last Name Bentley First Name A. Middle Initial C.

Abbreviation Email

▼ Addresses + -
No Data.

▼ Variants + -
No Data.

▼ Agent Specialties + -
No Data.

▼ Identifiers + -
No Data.

Query Results: Agent    << < 2 / 5 > >>

Agent Type Person Title Mr.

Last Name Bentley First Name Andrew Middle Initial C.

Abbreviation Email abentley@ku.edu

▼ Addresses + -  << < 1 / 1 > >>

☒ Is Primary ☐ Is Current

Address Biodiversity Institute, University of Kansas

Address2 Dyche Hall, 1345 Jayhawk Boulevard

City Lawrence State KS Country USA Postal Code 66045

Room/Building Phone1 (785) 864 Phone2 Fax (785) 864

Delete  Loading... Close Save

Query Results: Agent    << < 5 / 5 > >>

Agent Type Person Title

Last Name Bentley First Name A. Middle Initial C.

Abbreviation Email

▼ Addresses + -
No Data.

▼ Variants + -
No Data.

▼ Agent Specialties + -
No Data.

▼ Identifiers + -
No Data.

Delete  2 Close Save

Query Results: Agent    << < 2 / 5 > >>

Agent Type Person Title Mr.

Last Name Bentley First Name Andrew Middle Initial C.

Abbreviation Email abentley@ku.edu 

▼ Addresses + -  << < 1 / 1 > >>

☒ Is Primary ☐ Is Current

Address Biodiversity Institute, University of Kansas

Address2 Dyche Hall, 1345 Jayhawk Boulevard

City Lawrence State KS Country USA Postal Code 66045

Room/Building Phone1 (785) 864 Phone2 Fax (785) 864

Delete  Loading... Close Save



Record Merging Tables Supported

- Agent
- Collecting Event
- Locality
- Paleo Context

Agent: Bentley, Andrew C 

Agent Type Title Job Title
Last Name First Name Middle Initial
Abbreviation Email
Org Type URL
Remarks

 Collection Object: 000037319

Cat # 000037319

Locality: Clear Fork Creek; North America, United States, Kansas, Pottawatomie; 39.519666667, -96.32633333  

Accession #  

Cat Date 

Paleo Context: Permian, Barneston Limestone 

Context Name

LithoStrat  

Chrono Strat  

Bio Strat

Remarks



Delete



11

Close

Save

nsas, Pottawatomie  

Longitude

Parsed

96:19.58 W

39° 31.18' N, 96°

19.58' W

Water Type

Date 

merica, United States, Kansas, Pottawatomie: Clear Fork Creek: 39.5196647644: -96.326332092

Is On Loan

Prepared Date

Voucher Storage

Remarks

Prep



Jar

Remarks

More information: [Record Merging](#)

Record Deduplication/Merging Tools



Move this data



This data is already used



Remove this record

Auto-Populate



Show conflicting fields only

1

Merge Records

Agnt

Watson, Benjamin M

Timestamp Created

N/A

Timestamp Modified

N/A

References to this record

N/A

Preview

New Merged Record

Date Of Birth

12/07/1948

Date Of Birth Precision

1

Email

BenjaminMWatson@superrito.com

First Name

Benjamin

GUID

5f46bfa8-42af-40bd-a9c4-897452b222dd

Job Title

Recreational therapist

Middle Initial

M

Title

Mr.

Addresses

4 Records

Modified By Agent

Bentley, Andrew C

+ Q

Organization

Sambo's

+ Q

Auto-Merge

☒ Show conflicting fields only

Agnt

Watson, Ben

X

Agnt

Watson, Benj

last week

18 hours ago

Collection Object - Cataloger (521)

Collecting Event - Collector (187)

Determination - Determiner (2,042)

Geo Coord Detail - Geo Ref Det By (233)

last week

last week

Determination - Determiner (102)

Preview 1

Preview 2

<

12/07/1948

<

mm/dd/yyyy

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1

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BenjaminMWatson@superrito.com

<

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Ben

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Benj

<

5f46bfa8-42af-40bd-a9c4-897452b222dd

<

623c2aa6-c59b-4b1d-9e50-56d76b...

<

Recreational therapist

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<

Mr.

<

<

3 Records

<

0 Records

<

Bentley, Andrew C

<

<

Sambo's

<

Record Links

📘 Merge Records

👤 Watson, Benjamin M

Timestamp Created N/A

Timestamp Modified N/A

References to this record N/A

Preview

New Merged Record

Date Of Birth12/07/1948

Date Of Birth Precision1

EmailBenjaminMWatson@superrito.com

First NameBenjamin

GUID5f46bfa8-42af-40bd-a9c4-897452b22dd

Job TitleRecreational therapist

Middle InitialM

TitleMr.

Addresses4 Records

Modified By AgentBentley, Andrew C

OrganizationSambo's

👤 Watson, Ben

last week

18 hours ago

📁 Collection Object - Cataloger (521)

👤 Collecting Event - Collector (187)

👤 Determination - Determiner (2,042)

📍 Geo Coord Detail - Geo Ref Det By (233)

Preview 1

12/07/1948

1

BenjaminMWatson@superrito.com

Ben

5f46bfa8-42af-40bd-a9c4-897452b22dd

Recreational therapist

Mr.

3 Records

Bentley, Andrew C

Sambo's

👤 Watson, Benj

last week

last week

last week

👤 Determination - Determiner (102)

Preview 2

mm/dd/yyyy

Benj

623c2aa6-c59b-4b1d-9e50-56d76be9

0 Records

👤 Watson, Benjamin M

last week

last week

last week

📁 Collection Object - Cataloger (5,164)

👤 Determination - Determiner (6,889)

Preview 3

mm/dd/yyyy

Benjamin

9af164cf-2c0b-4066-a7f2-de249df07f

1 Records

Auto-Merge

☒ Show conflicting fields only

Cancel

Merge