

Beyond - How to Mass Update Assignments

Last Modified on 04/18/2024 3:45 pm CDT

In certain scenarios, it is beneficial to update information for multiple assignments. This across-the-board update is especially helpful when multiple assignments are ending on the same day, statuses need to be updated, and/or messages need to be logged. Assignments can be updated, en masse, from the assignment search in Beyond™.

Looking to learn more about ending an assignment record? Check out [Beyond - How to End an Assignment](#)

Note In order to access this functionality within Beyond, you will need to be a member of a Permission Security Group that contains the 'mass-update-assignments' permission. For more information about security permissions see [Beyond - Managing Security Groups](#).

If you are unable to access this functionality, please reach out to your administrator.

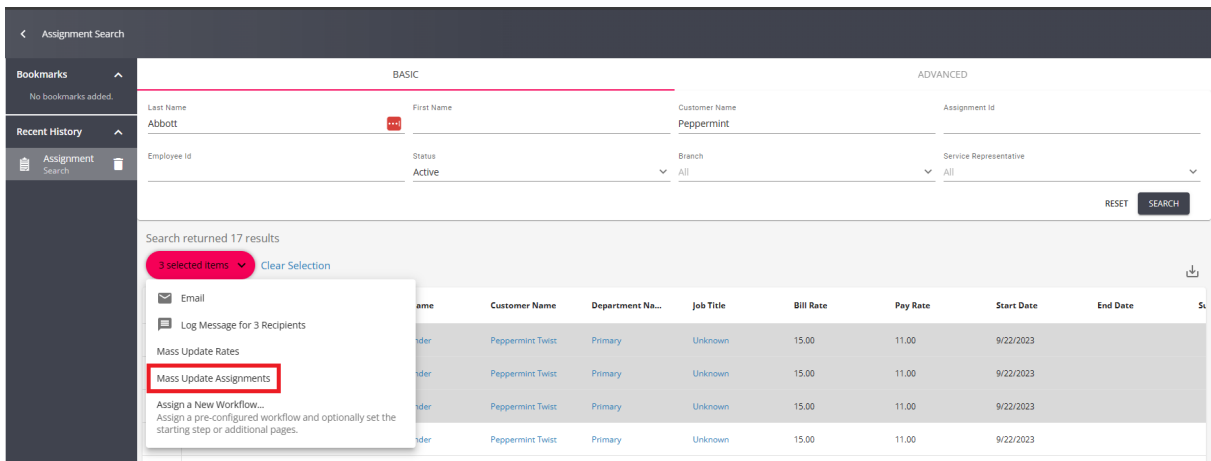
Mass Update Assignments

When you are ready to update multiple assignments at once, use the following instructions to mass end or update assignment records at once.

1. Navigate to an assignment search and search for the records you want to update.
 - For more information on searching, check out [Beyond - Advanced Searching](#)
2. Select the assignments from the search results that you want to update:

Bookmarks		BASIC				ADVANCED				
No bookmarks added.		Last Name	First Name	Customer Name	Assignment Id					
Recent History		Abbott		Peppermint						
Assignment Search		Employee Id	Status	Branch	Service Representative					
			Active	All	All					
Search returned 17 results										
3 selected items Clear Selection										
<input type="checkbox"/>	Assignment Id	Last Name	First Name	Customer Name	Department No...	Job Title	Bill Rate	Pay Rate	Start Date	End Date
<input checked="" type="checkbox"/>	4302385434	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023	
<input checked="" type="checkbox"/>	4302385445	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023	
<input checked="" type="checkbox"/>	4302385446	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023	
<input type="checkbox"/>	4302385470	Abbott	Alexander	Peppermint Twist	Primary	Unknown	15.00	11.00	9/22/2023	

3. Right click or select the search actions menu and choose Mass Update Assignments Option:



4. A new window will open with the following fields you can update en mass:



- Status (required) - New status that the assignment(s) will receive
- Message Action - Type of message that will be logged on the assignment(s)
- Performance Note - Note that will be added within the message logged on the assignment(s)
- End Date - Actual end date that the assignment(s) will receive
- Expected End Date - Expected end date that the assignment(s) will receive
- Customer DNA - Check this if the customer does not want the employee to work for them in the future

5. Once all of the information has been added that will be updated, select 'Next':

Mass Update Assignments

1 Select Status 2 Update Assignments

Update 3 Assignments and log a message.

* Status * Message Action

Complete Message

Performance Note

Assignments have been completed and the work was done to the standards of the customer.

End Date Estimated End Date

3/29/2024 X


Customer DNA


SAVE AS DRAFT CANCEL NEXT >


6. Select 'Submit' to verify the updating of assignments:

Mass Update Assignments

✓ Select Status 2 Update Assignments

 Alexander Abbott: Unknown

 Alexander Abbott: Unknown


 Alexander Abbott: Unknown


SAVE AS DRAFT CANCEL < PREVIOUS SUBMIT


7. The assignments will then be updated with green checkmarks to show your changes have been made:

Mass Update Assignments

✓ Select Status 2 Update Assignments

 Alexander Abbott: Unknown ✓

 Alexander Abbott: Unknown ✓

 Alexander Abbott: Unknown ✓

DONE

8. Click 'Done' and navigate to one of the updated assignments to see the information changed along with a message (if chosen to be added) to see all of the information that has been updated:

The screenshot shows a user interface for managing assignments. The top navigation bar includes 'VISIFILE', 'DETAILS', 'DOCUMENTS', 'MESSAGES', 'CUSTOM DATA', and 'ASSIGNMENT CUSTOM CONTENT'. The 'Snapshot' section displays the following details:

Assignment Id	4302385434	Status	Complete >
Employee Id	4295017595	Job Order Id	4295050629
Branch	High Tech NE	Temp Phone	--
Pay Rate	11.00	Bill Rate	15.00
Employer	High Tech & Staffing Services, Inc	Gross Profit Calculator	>

The 'Messages' section shows a message from 'joshua.kramer' dated 'TODAY' at 3:48 PM, with the content: 'Mass Update Assignment: Status: Complete Estimated End Date: -- Performance Note: Assignments have been completed and the work was done to the standards of the customer.'

In the event that you need to navigate away from this process before submitting the changes, you have the option to save your progress as a draft to be continued at a later time.

To do this, click on 'Save as Draft' at the bottom left corner of the window. You will then see the draft is saved at the top left corner of the Activity Panel. Once back within the saved draft, you will have the added options of updating or deleting the draft:

The 'Mass Update Assignments' form contains the following elements:

- Progress indicators: 1 Select Status, 2 Update Assignments
- Summary: Update 3 Assignments and log a message.
- * Status: Complete (dropdown)
- * Message Action: Message (dropdown)
- Performance Note: [Text input field]
- End Date: [Text input field]
- Expected End Date: [Text input field]
- Customer DNA
- Buttons: SAVE AS DRAFT (highlighted), CANCEL, NEXT >

Remember that drafts will not persist after you have refreshed or closed your browser window.

Related Articles