

Beyond - How to Mass Update Assignments

Last Modified on 06/23/2022 12:21 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:

The screenshot shows the 'Search Assignments' interface. It has a blue header with 'Search Assignments'. Below the header are two tabs: 'BASIC' and 'ADVANCED'. Under 'BASIC', there are input fields for 'Last Name', 'First Name', and 'Customer Name'. Under 'ADVANCED', there are dropdown menus for 'Employee Id' (set to 'Active'), 'Branch' (set to 'All'), and 'Service Representative' (set to 'All'). There are 'RESET' and 'SEARCH' buttons. Below the filters, it says 'Search returned 2706 results'. There is a selection bar with '3 selected items' and a 'Clear Selection' button. Below that is a table with columns: Assignment Id, Last Name, First Name, Customer, Department, Job Title, Bill Rate, Pay Rate, Start Date, End Date, and Supervisor. Three rows are selected with blue checkmarks: 4301420103 (Lee, Faye, Cotton Candy, Smore, Forklift), 4301421177 (Stevens, Kendra, Cotton Candy, Smore, Assembler), and 4301421365 (Smith, Joe, Cotton Candy, Smore, Baker).

| Assignment Id | Last Name | First Name | Customer | Department | Job Title | Bill Rate | Pay Rate | Start Date | End Date | Supervisor |
|---------------|-----------|------------|--------------|------------|-----------|-----------|----------|------------|----------|-------------|
| 4301420103 | Lee | Faye | Cotton Candy | Smore | Forklift | 25.00 | 25.00 | 4/13/2020 | | Staples, M. |
| 4301421177 | Stevens | Kendra | Cotton Candy | Smore | Assembler | 25.00 | 20.00 | 2/14/2022 | | Staples, M. |
| 4301421365 | Smith | Joe | Cotton Candy | Smore | Baker | 19.50 | 15.00 | 4/4/2022 | | Staples, M. |

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

Search Assignments

BASIC ADVANCED

Last Name First Name Customer Name Assignment Id

Employee Id Status Active Branch All Service Representative All

RESET SEARCH

Search returned 2706 results

3 selected items Clear Selection

Email 2 Recipients

Mass Update Rates

Mass Update Assignments

Assign a New Workflow...
Assign a pre-configured workflow and optionally set the starting step or additional pages.

| Name | Customer | Department | Job Title | Bill Rate | Pay Rate | Start Date | End Date | Supervisor |
|------|--------------|------------|-----------|-----------|----------|------------|----------|------------|
| | Cotton Candy | Smore | Forklift | 25.00 | 25.00 | 4/13/2020 | | Staples, M |
| | Cotton Candy | Smore | Assembler | 25.00 | 20.00 | 2/14/2022 | | Staples, M |
| | Cotton Candy | Smore | Baker | 19.50 | 15.00 | 4/4/2022 | | Staples, M |

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

Mass Update Assignments

1 Select Status 2 Update Assignments

Update 3 Assignments and log a message.

Status Message Action

*Required Message

Performance Note

End Date Expected End Date

Customer DNA

SAVE AS DRAFT CANCEL NEXT >

- o Status (required) - New status that the assignment(s) will receive
- o Message Action - Type of message that will be logged on the assignment(s)
- o Performance Note - Note that will be added within the message logged on the assignment(s)
- o End Date - Actual end date that the assignment(s) will receive
- o Expected End Date - Expected end date that the assignment(s) will receive
- o 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: Complete Message Action: Message

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

End Date: 6/3/2019 Expected End Date: X

Customer DNA

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

Mass Update Assignments

Select Status 2 Update Assignments

| | | |
|--|----------------------------------|-------------------------------------|
| | 119 Emp 119 Emp: 11 Gold Express | <input checked="" type="checkbox"/> |
| | 130 Emp 130 Emp: Para Planner | <input checked="" type="checkbox"/> |
| | 130 Emp 130 Emp: Unknown | <input checked="" type="checkbox"/> |

[DONE](#)

7. 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:

ASSIGNMENT Assignment (4302347984) (4302347984) / Messages

119 Emp 119 Emp (4302347984)
 SPAM · 11 Gold Express

VISIFILE DETAILS **MESSAGES** CUSTOM DATA

Filter by message text...

3 messages

TODAY

Message · Jun 27th, 10:54 AM
 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.

119 Emp, 119 Emp SPAM 11 Gold Express (SPAM) 119 Emp, 119 Emp: 11 Gold Express

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:

Mass Update Assignments

1 Select Status ————— 2 Update Assignments

Update 3 Assignments and log a message.

* Status Complete ▼ * Message Action Message ▼

Performance Note

End Date Expected End Date

Customer DNA

SAVE AS DRAFT CANCEL NEXT >

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

Related Articles