Clarity - How to do Mass Updates in Clarity

How to do Mass Updates in Clarity

Discussion:

Sometimes you will want to change the value on an employee’s master paycard or their currently assigned departments for a group of employees on mass.   This can be done by using the “Mass Update” feature found under Utilities in Clarity.

How to:

1) Record values for two employees
    1. Employee #1 should be an employee you EXPECT to have their value changed, record below what their current value is for the field you are updating.

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    2. Employee #2 should be an employee you DO NOT EXPECT to have their value changed for, record below what their current value is for the field that you are updating.

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2) If updating something like the master paycard, also record the value of ANOTHER category on the employees master paycard.   This should be a category you DO NOT wish to update but for an employee that will be receiving an update.

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3) Now, go to Utilities Mass Update
4) Create a backup on the “Backup Company Data” Button that appears, this is necessary in case you make a mistake.
5) The next screen will ask if you wish to do this for “ALL Records” or “Group of Records”
    1. All Records will allow you to update a field in one of the available tables for ALL employees, no limitations are applied – this is NOT recommended)
    2. Group of Records will allow you to update a field for one or more employees, you can limit the details of the update as you see appropriate.
6) Select “Group of Records”

7) The next screen will allow you to specify WHAT you want to update and how to apply the limitation parameters on what is being updated.

8) First Click on the “X” icon at the top right corner of the table that is currently selected so that the Query 1 section is blank.

9) Double click on the table on the left that you wish to update, tables are named after the forms they are associated too in order to make things easier
IE: For updating the master paycards for employees you would double click the “master Paycards” table

10) Because we don’t want to update EVERY payroll category for EVERY employees master paycard we need to add a linking table. Add the Payroll Categories table to the query now by double clicking on it.

11) You should now have a Query section similar to that below. This is not yet completed. We now need to dictate HOW the two tables are connected to one another.
In order to do this, locate the ID field in the Payroll Category table and, while holding down the left mouse click, drag it over the ID_PAYROLL_CATEGORY field in the employees master paycard table.

12) After connecting the two tables, notice how a line is drawn between them.

IE: Clarity field names are simple to navigate. Any field that has ID_XYZ means that the field links to the ID field of the table with the name XYZ.
99% of the time is connection is as listed, exceptions are ID_Department will link to the ID field in the table called “LEVEL_TWO” (also note that any connections to “Departments” are table LEVEL_TWO, “Divisions” are table LEVEL_ONE, and “Employment Types” are table CONTRACT_TYPE) These are exceptions to the above rule.

13) Now we need to apply the limitation so that only ONE record is updated. This is done by clicking on the three ... icon in the bottom section labelled “Criteria” and select the “Add Criteria” from the pop-up menu that appears.

14) In the first blank field, when you click on it, you will get another pop-up that shows you the table(s) that you have selected in your query window with + signs next to them. By clicking on the + sign you will see the list expanded to see the list of fields that are available to select. It is recommended that you do the filter by the CODE or NUMBER field of the target table.

15) In the second blank enter the value that you wish to limit the list too. A good practice is to put the value in single quote brackets so that Category 202 would appear ‘202’. This is because without the quotes the system will treat the field as numeric, and if there are any non-numeric values in that field they will throw an error when you get to the final step.

In the above example, we are limiting the update to only deal with payroll category #205

16) Click on next, you will now be asked which table you wish to update.

17) Click on Next, you will now be asked which field from this table that you want to update.

18) Click on Next, you will then be asked WHAT you want to do this field, you can select from a list of options such as “Set to” to set the field to a new value and enter the respective value. You can also do things like “Multiply by a fix amount” in which case you will enter the amount to multiple the employees current value for the category by.

19) Click on Next, you will then be asked if rounding should be applied and to how many decimals, this is only necessary if doing a multiplication, division, or percentage.

20) Click on Next, you will now be asked for which payroll data year you wish to execute the update for. Typi cally you would be selecting the CURRENT payroll year at this time.
21) The final screen will show you a grid of the records to be updated. The first column shows the current value and the second column the new value.

22) The final step is type the words MASS UPDATE CONFIRMED, this must be entered in order to execute the update. This is necessary so updates cannot be done accidently.