



VSystem Webinar - Update and Create Tools Spring 2013

What's the difference?

In the User Tools panel there are two types of tools – Updaters and Creators.

- Updaters change or delete existing information
- Creators add new information

**BEFORE USING ANY OF THESE CREATE/UPDATE TOOLS,
BACKUP YOUR DATA!**

Changes made with these tools are permanent. There is no “Undo” other than replacing your data with a backup.

Working with Creators

There are three bulk create tools and they all work the same way:

- Bulk awards creator
- Bulk certifications creator
- Bulk job associations creator

Each creator is made up of 3 basic parts:

1. Rules: How do you want this information created?
2. Values link: This link will allow you to set the values associated with this data – ie. dates, descriptions and status.
3. Source criteria: Which volunteers should this be applied to (standard filters).

Working with Updaters:

Bulk value updater – This updater is a very powerful tool that allows you to edit or delete large numbers of records that meet your filter criteria. It's a two part process; part one is the search you are performing and part two is the action to take on the records that meet your criteria. It can be used for various record types:

- People
- Certifications
- Addresses
- Assignments
- Hours records
- Awards
- Job definitions
- Comments
- Job associations

How to use it

With so many areas the bulk updater can be applied, its use will vary.

In this example, we're going to delete old assignments. Assignment records are distinct from hours records so all of the volunteer's hours will still be retained. We are just going to delete the assignments – ie. John Doe worked from 11:30 to 2:30 on May 27th at the Information desk.

So we're going to take all of the assignments prior to 2009 and delete them using the Bulk Value Updater.

1. Click on **Bulk value updater** from the **User tools** panel under **Bulk update/create tools**, either globally or within a project.
2. Select the **Items to update/Item type**. In this case, select **Assignments**.
3. Select the **Action** - whether they're to be updated or deleted. In this case, select **Delete records**.
4. **Test mode** – run your update in Test mode first to verify your settings.
5. Enter the **Source Criteria** which determines the records to be affected. These criteria will depend on the type of object selected.
For this example, we selected **(no filter)** locations and **(no filter)** jobs. We want all the assignments before 2009, so we will leave the minimum date blank and set a maximum date of 12/31/2008. The only other specification we are going to make is to select an **Assignment Status of Normal** - that will retain the assignments where a volunteer cancelled, was excused, etc.

Settings
[Clear](#)
[Load/save settings](#)

Help
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Items to update
 Item type: Assignments
 Action: Delete records
 Test mode (no changes will be saved)

Source criteria
 Include project-based assignments
 Locations: (no filter)
 Jobs: (no filter)
 Min date: [] Max date: 12/31/2008
 Start time: 12:00 AM End time: 11:59 PM Min duration: 0 Max: 0
 Credited: Credited and uncredited
 Assignment status: Normal
 Supervisor: (no filter)
 Days of the week: (all)
 Exclude people with these flags: (no filter)
 Filter entrants by gender
 Filter entrants by age
 Filter entrants by group
 Filter entrants by type

[Add another filter](#)

Get items to update Run

6. Take off all the exclusion filters – we want to remove these records even if a person is active, inactive or archived.
7. Click **Get items to update**. VSys will find all of the records which meet your criteria, and show them to you on screen.

Records to be changed						
Volunteer	Start	Duration	Job	Job group	Location	
<input checked="" type="checkbox"/> Abernathy, Anita B	12/01/2005 08:00AM	4:00	F&F Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	12/05/2005 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	12/15/2005 08:00AM	4:00	C&C Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	12/22/2005 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	12/29/2005 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	01/05/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	01/12/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	01/19/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	01/26/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	02/02/2006 08:00AM	4:00	C&C Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	02/09/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	02/15/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	02/23/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	03/02/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	
<input checked="" type="checkbox"/> Abernathy, Anita B	03/09/2006 08:00AM	4:00	E&E Transport	Errand & Escort	General	

18241 items shown

8. Verify that your criteria brought the expected results, then select which of these should be updated. Use the **All/None/Reverse** tools on the **right-click** menu to do this in bulk.
9. Click the **Run** button. VSys will prompt you one last time with the count of records to be updated, after you confirm this, it will start the update process.
10. VSys will show you a report of all of the records which were changed.

Update entrant statuses tools

Since this tool is more specialized than the Bulk Value Updater, you will see that it has far fewer options. You will see options to isolate the entrants who you want to change and under the **Actions** field the way that they can be updated.

Extend recurring assignments Tool

Also located on the User Tools menu, this tool will extend recurring assignments. Select the job and the range of dates when the assignments will expire. For example to find everything that will expire by the end of summer choose *Currently extended to between* and dates of today through September 15th. Then use the list that comes up to extend those assignments out another period of time. (Note: this cannot be undone, and if you have a long list and are extending them out a long time, it may take several minutes to create all the assignments.)