

Mass Update vs Modify List

This is a story about updating records in the student information system (MyEd). To get maximum value and to avoid mass errors, please read the entire story before using the Mass Update function in MyEd.

The Mass Update Story

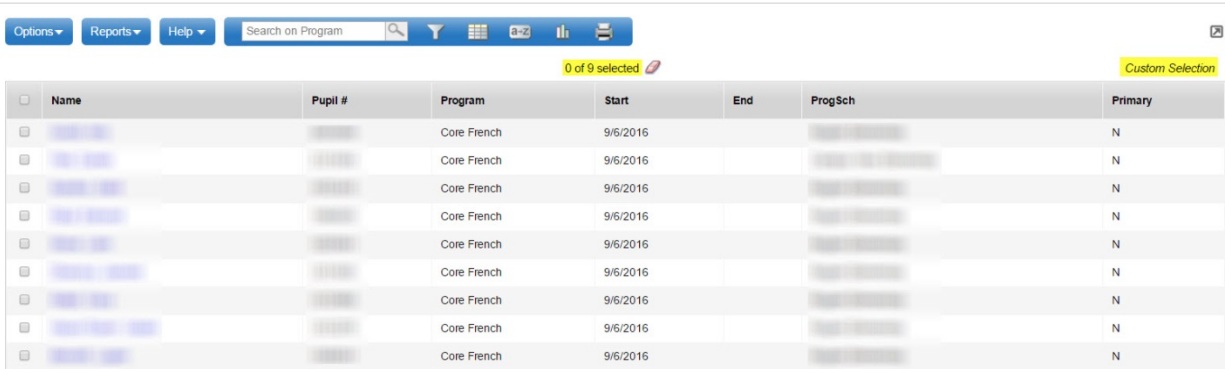
On a dark and stormy night in a far-away BC school district, a user of the student information system decided to use the mass update function to change a bunch of records. DUN DAH! . . . Now, if you are the user in this story, it is up to you to make a happy ending OR a very sad ending to this story.

Mass update is a very convenient way to update several records at a time, however, it does need to be used with an abundance of caution. There are alternate ways to update records, which are slower but also lessen the risk of doing so unintentionally. **There is NO Mass Un-do!**

The first step is to ensure you are using a field set which displays the field(s) you want to update.

Next, select the records you want to update.

Use Options > Show Selected to single out only those records in the display. Your display may have several pages.



<input type="checkbox"/>	Name	Pupil #	Program	Start	End	ProgSch	Primary
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N
<input type="checkbox"/>			Core French	9/6/2016			N

Check the number of records selected for updating. If it's a large number, you may have inadvertently selected too many or forgotten to use Options > Show Selected. Review your list of records and ensure that only the ones you want to update are included in the list. There may be several pages. Check each page.

0 of 1170 selected

In this example, there are two numbers in the display. Ignore the first number (i.e., the zero). It is the second number that represents the number of records that are included for mass updating. In this case: 1,170 records are selected for mass updating. This large number would warrant a review of the list to ensure accuracy and to avoid potential errors. If the number of records is incorrect, you should redo your selection.

Review your list of records again, and ensure they are the right records for the mass update process.

Abundance of caution** There is no “Mass Undo”!** Were you interrupted during this process? Did the telephone ring or did someone require your attention or assistance?****

This is a common occurrence in a school office, and this is where mistakes are made. If you are even remotely uncertain that you have selected the correct records to be updated, **STOP!!!**

When in doubt, start over again by redoing your selection. Check your list **again**. It takes extra time, however, it is time well spent. Remember, you choose: Happy Ending or Sad Ending to your story?

Were you able to review and confirm your list of records without being interrupted? – If YES, great!!! Now take an extract of these records by clicking on the Printer icon, and saving the information as a CSV file so you can refer back to it if necessary. You need to know exactly what records you have changed in case you need to go back and correct errors.

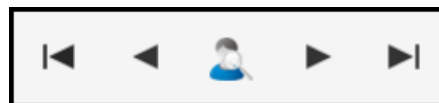
Once you are **completely** certain you have selected the correct records for mass updating, and you have extracted the records as a backup reference, you can proceed.

The Modify List Story

Modify List is another way to update records. Use the same method(s), and caution, as in the Mass Update story to select the records to be modified. Once you have selected the records, use Options > Show Selected to single them out. Check your list again to ensure it is accurate. Once you have checked and rechecked the list, especially after interruptions, and confirmed you want to modify these records, you can then go to Options > Modify List to do the editing.


You can only edit the columns which show the icon that looks like a pencil. Click on the icon, and proceed with editing the records on the page. **Remember:** click the green checkmark at the top of the column to save your changes **before** moving to the next page. Otherwise, you will lose your changes. When you have finished editing and have saved, go to Options > Modify List again to exit this function.

Finally, you can update a record individually. Use the same cautions as above to single out only the records you want to update. You can use the Record Navigation buttons within the record to scroll to the next record, after saving your changes.

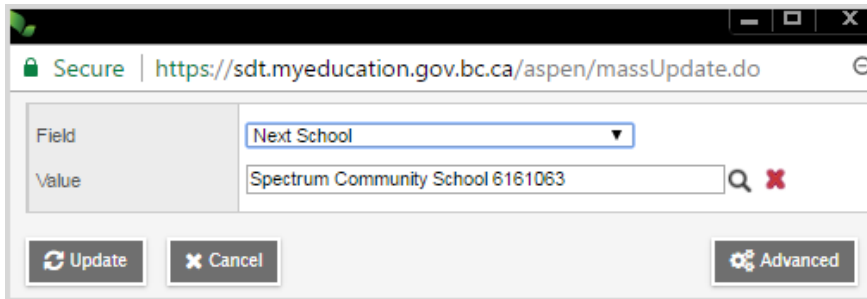


“Cole’s Notes” for the Mass Update Story: The Steps

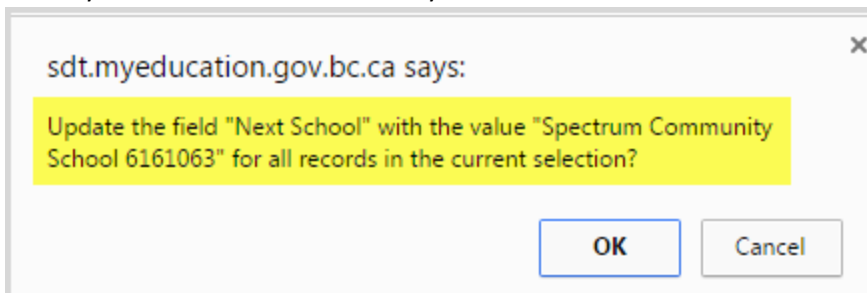
1. Did you read the story? If YES, go to Step 2. If No, please read The Mass Update Story from the beginning. *****Remember*** There is NO Mass Un-do!**
2. Ensure you are using a field set which displays the field(s) you want to update.
3. Select the records you want to update. There are five methods for selecting records.
 - a. Use a filter.
 - b. Use Options > Query.
 - c. Use a snapshot you have saved.
 - d. Click the checkbox next to each record to be updated.
 - e. A combination of two or more of the previous four.
4. Use **Options > Show Selected** to single out just the records to be updated.

0 of 1170 selected 

5. Check the number of records displayed. There may be several pages, so check each page.
6. If you are completely certain you have the correct records selected, take an extract by clicking the Printer icon and saving the file as a .CSV. Keep this extract as a back-up reference.
7. Use Options > Mass Update
8. Identify the Field for mass updating and the Value that will be applied to the field for all the identified records.

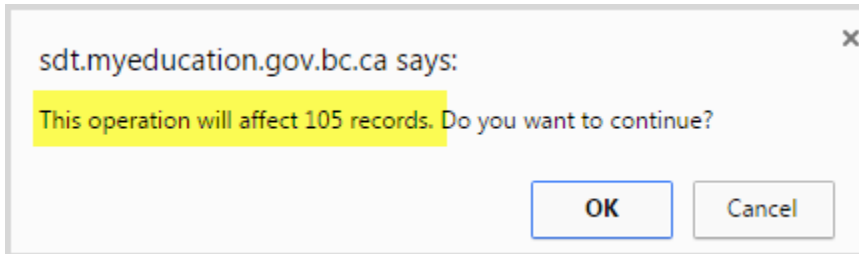


9. Click Update.
10. Read the message carefully. *****Remember*** There is NO Mass Un-do!**
This is your first chance to cancel if you are uncertain.



11. Click OK if you want to proceed; or Click Cancel if you are uncertain.

12. Read the next message carefully. *****Remember***** **There is NO Mass Un-do!**
This is your last chance to cancel if you are uncertain.



13. Click OK to Mass Update the records or Click Cancel if you are uncertain.