



The Professionals' Choice

StarPM: Mass Update

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Setup and User Guide

Copyright

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Contents

Copyright	1
Introduction	1
Prerequisites	1
Replace Terms	1
Home Screen	3
Toolbar	3
Columns	3
Paging	3
Add or Edit a Batch	5
Add a Batch	5
Edit a Batch	5
Constraints Preview	5
Delete a Batch	5
Batch Maintenance	6
Toolbar	6
Constraints	7
Items	8
Selection for Inclusion	8
Column Sorting and Filtering	9
Processing Batch Updates	10
Filter WIP by Date?	10
Cascade is active (on)	10
User's Choice	10
Result	11
Setup	12
Privileges	12
Application Tabs Auto-hide	12
Star Database Settings	13
Application Settings	13
Batch Processing	13
Star PDM Switch Settings	14
Entity and Service Line Restrictions	14

Introduction

The StarPM: Mass Update module allows users to update large numbers of Client (Partners and Managers) and Job (Partners and Managers) records, selectively but in a single operation, on a batch basis.

The StarPM: Mass Update (Web) module is independent of the Star PDM Mass Update (Windows) application. StarPM batches cannot be viewed or amended using Star PDM, and vice-versa.

In Star PDM, Client- and Job-related information is usually updated on a Client-by-Client or Job-by-Job basis, using the appropriate Client or Job User-designed Form (UDF) to update individual records. Where there are many records to be updated this approach is inefficient, and therefore costly. The StarPM: Mass Update module streamlines this process, and provides enhanced mass update functionality.

Star PDM currently handles only Job Status updates, while StarPM: Mass Update handles only Partner/Manger updates. Job Status updates can be achieved in StarPM using the StarPM: Custom Forms (UDF) module to update individual records (as in Star PDM).

Among the most common changes made in updates are those to the assignment of Partners and Managers responsible for Clients and Jobs, leading to portfolio re-allocation. These changes are often interrelated, and typically occur in the following circumstances:

- New Partners and/or Managers joining,
- Promotions,
- Departures and retirements,
- Mergers and acquisitions, bringing in new portfolios.

In such cases, StarPM: Mass Update functionality enables the selective update of large numbers of Client and Job records in a single operation, and on a batch basis, including the following data:

- Client partners,
- Client managers,
- Job partners,
- Job managers.

Prerequisites

Access to various functions within Mass Update is dependent upon user permissions, which are defined in Star PDM.

If you do not see a particular menu option or screen as described in this document, then that is probably because you do not have the requisite permission.

In addition, this document assumes that instances of each of the following entities have been created in Star PDM:

- Staff.
- Staff Privileges (see Setup/[Privileges](#)).
- Clients.
- Jobs.

Replace Terms

Many of the standard terms used throughout any 'vanilla' installation of StarPM can be replaced by synonyms. This is useful, for instance, when Star terminology does not reflect the standard lexicon of your organisation. Star refers

to such synonyms as Replace Terms.

This Help manual uses standard terms throughout.

Home Screen

The StarPM: Mass Update home screen contains a grid, each row of which represents one currently pending batch.

BATCH ID	BATCH TYPE	CREATED ON	CREATED BY	DESCRIPTION	EFFECTIVE FROM	STATUS	NO OF PROCESSED	NO OF FAILED	ACTION
1	Job	15/10/2019	lrm own	Saved Batch ID : 1	15/10/2019	Pending	0	0	Edit Delete
2	Client	15/10/2019	lrm own	Saved Batch ID : 2	15/10/2019	Pending	0	0	Edit Delete

Toolbar

The home screen toolbar provides the following options:

Only available to users with the required [privileges](#).

- **Add:**
 - **Client** - Displays the Client [batch maintenance](#) screen, in which you can define a new Client batch.
 - **Job** - Displays the Job batch maintenance screen, in which you can define a new Job batch.
- **View** - Filters the grid to display only the selected subset of batches:
 - **All Batch Types / Pending Batches** only.
 - **All Batch Types / All Batches**, including those already processed.
 - **Client / Pending Client Batches** only.
 - **Client / All Client Batches**.
 - **Job / Pending Job Batches** only.
 - **Job / All Job Batches**.
- **Home** - When clicked within the home screen, refreshes the contents of the batch grid. When clicked within the batch maintenance screen, returns you to the home screen, automatically refreshing the contents of the batch grid.

Columns

The home screen grid displays the following columns:

- **Batch ID** - The unique identifier for this batch.
- **Batch Type** - The type of batch: Client or Job.
- **Created On** - The date on which the batch was created
- **Created By** - The name of the user who created the batch.
- **Description** - A brief annotation to further identify the batch.
- **Status** - The status of the batch.
- **No of Processed** - The number of items in the batch that have been processed successfully.
- **No of Failed** - The number of items in the batch that have failed processing.
- **Action** - **Edit** and **Delete**. See [Add or Edit a Batch](#) below.

Paging

If the number of batches in the batch grid exceeds the maximum number that can be displayed in a single grid view, then the grid is 'paged'. Its pages can then be navigated using the buttons (Go to the Previous Page, Go to the

Last Page, etc) in the toolbar beneath the grid. Tooltips on each button indicate its function.



You can modify the number of items displayed in each page by selecting a limit of **5**, **10** or **20** items from the **Items per Page** drop-down.

The **Refresh** button, when clicked, refreshes the contents of the batch grid.

Add or Edit a Batch

To the right of each [home screen](#) grid row, at individual batch level, buttons provide batch Edit and Delete functionality.

Add a Batch

To add a new Client or Job batch:

1. Click **Add**
2. Select either **Client** for a Client batch, or **Job** for a Job batch.
The [batch maintenance](#) screen (either **Client** or **Job Batch Details**) is displayed.

Edit a Batch

To edit a batch:

- Click the **Edit** button at the end of the row representing the batch.

Active only for batches not yet processed.

The [batch maintenance](#) screen (either **Client** or **Job Batch Details**) is displayed.

In batch maintenance you can configure batch Constraints, which enable the restriction of batch updates to include only records matching selected criteria, and/or (if some implementations) to update only selected criteria (e.g. the Partner and/or Manager assigned to a Job or Client).

Constraints Preview

For a preview of the current batch Constraints (i.e. as configured in the [Constraints](#) tab in the Batch Maintenance screen), simply double-click the batch. This displays a read-only view of the Constraints grid. Click **Home** to close the preview and return to the home screen.

Delete a Batch

To delete a batch:

- Click the **Delete** button at the end of the row representing the batch.
The batch is deleted.

Batch Maintenance

The batch maintenance screen (**Client** or **Job Batch Details**) allows you to create and maintain batches. It is displayed automatically whenever you add a new Job or Client batch via the [home screen](#), and can subsequently be invoked from the home screen in order to edit a batch created previously.

The screenshot shows the 'Client Batch Details' screen. At the top is a toolbar with icons for 'New Line', 'Process', 'Save', 'Delete Line', and 'Home'. Below the toolbar is a form with the following fields: 'BatchID' (value: 104), 'Description' (value: Unsaved Batch), 'Created By' (value: 104), 'Created On' (value: 10/10/2018 07:50:21), 'Processed Records' (value: 0), and 'Failed Records' (value: 0). Below the form are three tabs: 'CONSTRAINTS', 'ITEMS', and 'RESULT'. Under the 'CONSTRAINTS' tab, there is a table with the following columns: 'SELECT', 'TYPE', 'TABLE', 'FIELD', 'COMPARISON', 'OPERATOR', and 'HIGH VALUE'. The table contains one row with the following values: 'Filter', 'Client', 'Partner', 'Equals', and empty cells for the other columns.

The **Client** or **Job Batch Details** region displays high-level details of the selected batch:

- **BatchID** - The ID of the batch, assigned when the batch was first processed or saved (read only).
- **Description** - A brief description of the batch (editable).
- **Created By** - The ID of the user who created the batch (read only).
- **Created On** - The date on which the batch was created (read only).
- **Processed Records** - The number of records in this batch so far processed.

All batch updates are subject to switch settings, maintained in Star PDM, which determine how batches are processed; e.g. whether and how changes to Client or Job Partner and/or Manager cascade down to relevant Job and/or WIP records. For details, refer to the [Setup](#) section at the end of this document.

All changes to a batch are audited, with all changes being written to the standard Audit Trail (Star database table tblAuditTrail).

Toolbar

The batch maintenance toolbar presents the following options:

- **New Line** - Adds a new line to the grid in the **Constraints** tab.
- **Process** - Activated when Items are selected in the **Items** tab.

When you click **Process**, the selected Items (if any) are processed according to both the conditions configured in the **Constraints** tab, and those configuration [switch settings](#) that govern batch processing.

If your implementation of StarPM: Mass Update is configured to cascade changes to Client or Job, Partner or Manager to relevant Job and WIP records in the database table (see [Setup/Star Database Settings](#)), then you may be prompted either to specify the date from which WIP records should be updated (see [Processing Batch Updates](#)). If you click **Save and Proceed** without first selecting a date, all WIP records in the database table are updated.

- **Save** - Saves any unsaved changes to the batch details.
A Batch Changes Saved dialog is displayed, confirming the Batch ID. Click **OK** to close the dialog.
- **Delete Line** - Deletes any constraints currently selected in the [Constraints](#) tab.
- **Home** - Returns you to the home screen, automatically refreshing the contents of the batch grid in that screen.

Constraints

Constraints allow you to either:

- a. Restrict batch updates to include only records that match selected criteria (Filter Constraints),
- b. Update selected Criteria (e.g. the Partner and/or Manager assigned to a Job or Client) with new values (Update Constraints), or
- c. Restrict updates according to selected Criteria *and* update selected Criteria (Both Constraints).

Update Constraints affect only the specific batch type's primary database table. Filter Constraints affect filtering on all tables in the pre-defined list set in the database: refer to the Database schema.

CONSTRAINTS						
ITEMS						
RESULT						
SEL...	TYPE	TABLE	FIELD	COMPARISON	CRITERIA	NEW VALUE
	Filter	Job	Entity	Equals	Star & Co LLC	
	Filter	Job	Partner	Equals		
	Filter	Job	Partner	Equals		

To define a batch update Constraint:

1. Add a new row to the **Constraints** grid.
2. Click within each column sequentially to activate drop-down controls and select the following values:
 - **Type** - The type of Constraint to be applied:
 - **Filter** - Filter the batch update Items (see below) to include only those that match a selected Criterion.
 - **Update** - In the selected database Table, update a selected Criterion with a new value.
 - **Both** - Filter the batch update Items to include only those that match a selected Criterion, and update that Criterion with a new value.
 - **Table** - Only active if the Constraint Type is **Filter**. Select the database table in which the Constraint will be applied, either **Job** or **Client**.
 - **Field** - Select the specific field within the selected table to be updated, e.g., **Job** or **Client**.
 - **Comparison** - Select the appropriate equality operator, either **Equals** or **NotEqual**.
 - **Criteria** - Click in this column to activate a drop-down from which to select the specific Comparison criterion. The values available for selection are dependent on the **Field** selection.
 - **New Value** - Only active if the Constraint Type is **Update** or **Both**. Select the new value to be assigned to the selected Field. The values available for selection are dependent on the **Field** selection.

Items

Once you have defined the batch Constraints, the **Items** tab displays every Job currently included in the batch according to those Constraints: i.e. the database records that, if selected for inclusion, will be affected by the update.

In this tab, you can select/deselect any or all Items for inclusion in the update.

CONSTRAINTS							ITEMS	RESULT
JOB ID	JOB REF	NAME	CLIENT REF	CLIENT NAME	PARTNER	MANAGER		
						Ian Thompson		
332	332	Tax	188	Client 188	Bernard Skalla	Ian Thompson		
566	0566AU2007	Audit 2007	188	Client 188	Bernard Skalla	Ian Thompson		
897	0897AU2008	Audit 2008	188	Client 188	Bernard Skalla	Ian Thompson		

To narrow the list of Items displayed, use the standard [filter controls](#).

Changes made here cannot override the batch Constraints.

The columns displayed in the Items grid will vary according to the current Batch Type.

Selection for Inclusion

To select individual Items for inclusion in the update, select the checkbox in the **Select All** column on each appropriate row.

To select all Items for inclusion in the update, select the checkbox in the **Select All** column header.

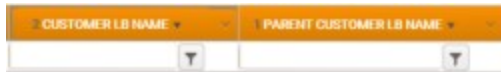
To deselect Items for inclusion, simply deselect the checkboxes in the **Select All** column as appropriate.

Column Sorting and Filtering

A drop-down control to the right of each column header gives access to the following options:

- **Sort Ascending** - Applies an ascending alphanumeric sort order.
- **Sort Descending** - Applies a descending alphanumeric sort order.
- **Columns** - Displays an alphabetical checklist of every column available for display. De-select the checkbox of any column that you do not want to be displayed.
- **Filter** - Displays standard grid filter controls (filtering relative to specified values).

If you apply multiple column sort criteria, number prefixes in the relevant columns display their order of precedence.



To remove applied custom sorting:

- Right-click in the column header row and select **Clear Sorts**.

To save custom sorting, to be applied in future sessions:

- Right-click in the column header row and select **Save Layout**.

Processing Batch Updates

Once a batch update is fully configured, it can be processed by clicking **Process** in the [batch maintenance](#) toolbar.

When you click **Process**, the records selected for inclusion in the batch maintenance [Items](#) tab are processed according to both the conditions configured in the [Constraints](#) tab, and those [switch settings](#) that govern batch processing.

Filter WIP by Date?

If your implementation of StarPM: Mass Update is configured to cascade changes to Client or Job Partner or Manager to relevant Job and WIP records in the database table (see Setup/[Star Database Settings](#)), then you may be prompted for confirmation.

Cascade is active (on)

If the application displays an **Auto Cascade Turned On** warning dialog, and you want to continue to process the batch update, simply click **Proceed** (if you do not want to proceed, click **Cancel**: processing is then cancelled).

User's Choice

You may be prompted to specify the date from which WIP records will be updated.



Click the calendar control to select the date from which WIP records should be updated, and then click **Save and Proceed**. Alternatively, click **Save and Proceed** without first selecting a date: all WIP records in the database table are then updated.

If changes to the Client Partner or Manager cascade down to relevant Job and WIP records, you must also decide if cascading will update only Job data, WIP data, or both Job and WIP: select the appropriate checkbox(es).

Result

Once a batch update is completed, the **Result** tab within the batch maintenance screen is activated to display a summary of the records that were processed.

Records that are processed successfully are displayed in the upper **Processed Records** grid; those that are not are displayed in the lower **Failed Records** grid.

If more than one database table is affected, a separate grid is displayed for each table.

Batch Details

BatchID: 1 Description: Saved Batch ID - 1

Created By: lin owen Created On: 15/10/2018 07:23:12 Processed Records: 32 Failed Records: 0

CONSTRANTS ITEMS RESULT

Processed Records

JOB ID	JOB REF	NAME	CLIENT REF	CLIENT NAME	PARTNER	MANAGER
32	32	Compliance	34	Client 34	Bennett C.	Ken Page
38	38	Corporate Recovery	45	Client 45	Bennett C.	Jack Cooper
95	0095AL2007	Audit 2007	155	Client 155	Bennett C.	Kirsty Ash
96	0096CO2007	Compliance 2007	155	Client 155	Bennett C.	Kirsty Ash
137	137	Compliance	254	Client 254	Bennett C.	Julie Groves
149	149	Audit	309	Client 309	Bennett C.	Sally Donnelly
159	0159AL2007	Audit 2007	342	Client 342	Bennett C.	Ian Strange
160	0160CO2007	Compliance 2007	342	Client 342	Bennett C.	Ian Strange
179	0179CO2007	Compliance 2007	408	Client 408	Bennett C.	Nigel Grant
181	0181AL2007	Audit 2007	408	Client 408	Bennett C.	Nigel Grant
182	182	Tax	408	Client 408	Bennett C.	Nigel Grant
199	0199AL2007	Audit 2007	12	Client 12	Bennett C.	Adam Caldwell
210	0210AL2007	Audit 2007	23	Client 23	Bennett C.	Andrew Brand
234	0234AL2007	Audit 2007	67	Client 67	Bennett C.	Catherine Jones
246	0246AL2007	Audit 2007	78	Client 78	Bennett C.	Ian Blackwell
250	0250AL2007	Audit 2007	89	Client 89	Bennett C.	Bill Small

Failed Records

JOB ID	JOB REF	NAME	CLIENT REF	CLIENT NAME	PARTNER	MANAGER
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Setup

Before Staff can use Mass Update, an administrator must complete various set-up tasks, each of which is detailed below.

For Staff Privileges, see [Privileges](#), under Introduction.

Privileges

User privileges are determined by switch settings configured in Star PDM (Setup/Privileges).

There are three Client-level switches in Privileges Section 'Mass Update', all relating to Star database table tblPriv:

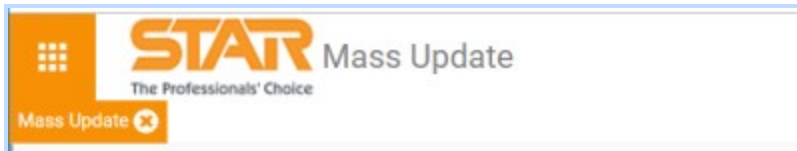
- **Batch Maintenance** (privMUClientMaintenance) - **None, View, Edit, Create, or Create and Edit.**
- **Process Batch** (privMUClientProcess) - **Yes or No.**
- **Delete Batch** (privMUClientDelete) - **Yes or No**

... in addition to three Job-level privileges:

- **Batch Maintenance** (privMUMaintenance)
- **Process Batch** (privMUProcess)
- **Delete Batch** (privMUDelete).

Application Tabs Auto-hide

In StarPM, each open module is represented by a tab in a tab row beneath the HTML Title header.



Open application tabs can be set either to be of fixed display, or to be hidden automatically when not in use. Fixed display prevents vertical interface shifts whenever the user moves their cursor over the header area, thus invoking the tabs' display.

The auto-hide behaviour is controlled by a setting, LauncherAutohide, in Star database table tblPersonalSettings. To enable auto-hide, LauncherAutohide must be set to 1. The default value is 0 (auto-hide disabled).

Star Database Settings

The following settings are maintained in the Star PDM database.

Application Settings

A new column in database table tblmassupdatebatches, **CreatedByApplicationId** is used to distinguish Star PDM (Windows) batches from StarPM (Web) batches.

StarPM batches cannot be viewed or amended using Star PDM, and vice-versa.

- CreatedByApplicationId=1 for Windows batches
- CreatedByApplicationId=2 for Web batches.

Batch Processing

Four switches in database table tblPersonalSettings determine how updates are batch processed.

In the following switch names, the words Partner and Manager are both subject to [Replace Terms](#).

- **AutoChangeJobManager** - Determines whether or not changes to the Client Manager cascade down to relevant Job and WIP records.
- **AutoChangeJobPartner** - Determines whether or not changes to the Client Partner cascade down to relevant Job and WIP records.
- **AutoChangeWIPManager** - Determines whether or not changes to the Client/Job Manager cascade down to relevant WIP records.
- **AutoChangeWIPPartner** - Determines whether or not changes to the Client/Job Partner cascade down to relevant WIP records.

Valid settings for these switches are:

- 0 - User's Choice. The default setting where none is specified.
- 1 - Cascade is active (on). The user is prompted for confirmation to proceed.
- 2 - Cascade is inactive (off).

When these switch settings are either 0 or 1, users are prompted for confirmation and, where appropriate, to applying any necessary filters before the batch is processed.

Note that cascades to Job and WIP records operate independently. The possible permutations and outcomes are as follows:

Cascade to Job?	Cascade to WIP?	Outcome
No	No	Nothing is cascaded.
No	Yes	Cascades update relevant Client fields in tblWIP. (Job fields are <i>not</i> updated.)
Yes	No	Cascades update only relevant Job field in tblJob.
Yes	Yes	Cascades update the relevant Job field in tblJob, and the relevant Client and Job fields in tblWIP, tblWIPDimensions and tblBillingForecastingBudgets.

Star PDM Switch Settings

The StarPM: Mass Update module must be enabled in Star PDM/Setup/Firm Details by selecting the following Firm Switch in Functional Area: Mass Update:

- **MassUpdate**

Entity and Service Line Restrictions

Two further switch settings in the same Functional Area determine the behaviour of Entity and Service Line restrictions with regard to Job batches:

- **MassJobUpdateUseEntities** – If selected, batches are bound to an entity when it is created.
- **MassJobUpdateUseServiceLines** – If selected, batches are bound to a service line when it is created.

Effect on Client Batches

Cascade functionality, by design, ignores entity and service line restrictions, and the above switches do not effect Client batches.

To prevent confusion, Client batches do not allow Filter Constraints on service line or entities, regardless of the settings of the above switch settings.

For Client batches, neither ServiceLineID nor EntityID are recorded in the database Client table, and neither are hidden to any users, regardless of the settings of the above switch settings.

Effect on Job Batches

If the above switch settings are selected (on), every Job batch will be linked to one entity and/or one service line.

Default Filter Constraints are added for the service line and/or entity. These cannot be deleted, and only the Criteria field can be edited.

Only one Filter Constraint is supported for each service line or entity. Drop-down controls are filtered to include only those service lines and/or entities for which the user has permission to view.

ServiceLineID and EntityID are recorded in the database Batches table according to the value set in the Filter Constraint.

Only users with the appropriate entity/service line restrictions are permitted to view associated batches.