Multi-Record Changes

The 'global change' tools under SYSTEM change information on multiple Company, Name or Position records in a single process. Due to the wide scope of these sorts of changes and nuances of the data format, we recommend seeking assistance from the PCRecruiter support team before using this feature.

Use these features with strong caution. Changes made cannot be undone. Only a database restore from the previous day of the change can revert these changes. You will be billed for the time involved in restoring unintended data changes.

Global Changes for Predefined Field Data

1. Click the **System** icon on the Main Toolbar.
2. Click **Global Change**.
3. Click **Change Companies, Change Names,** or **Change Position**, depending on the desired change.
4. **Predefined** field types will be selected by default.
5. Select the **Field Name** from the dropdown list.
6. **Limit to a Rollup** — This is 'optional' but strongly suggested. If no Rollup is selected, the change will be applied *to the entire database.*
7. Enter a **New Value** for the selected field. Note that some fields, such as 'Status', are addressed by a single-letter code and may not appear on screen as they are stored in the database.
8. Enter an **Original Value** (Optional). Note that some fields, such as 'Status', are addressed by a single-letter code and may not appear on screen as they are stored in the database.
    - Only records with a matching Original Value will be updated to the New Value, skipping those that do not match.
    - This value must be entered exactly as it is stored in the record in order to be detected.

9. **Modify Only Empty Fields** instructs the system to skip records that already have a value for that field.
10. After double-checking all of your settings click **Apply** at the bottom of the window. An update window with a progress bar will confirm that your changes have been made. Do not close the window until changes have completed.

Global Changes for Custom Field Data

1. Click the **System** icon on the Main Toolbar.
2. Click **Global Change**.
3. Click **Change Companies, Change Names,** or **Change Position**, depending on the desired change.
4. Click the **Custom** charm in the upper left corner of the window.
5. Select the appropriate **Global Change Mode** from the dropdown:
   - **Replace All Values:** This mode will delete all values in the custom field and replace it with the new value that you type in.
   - **Modify Only Empty Fields:** This mode will only update records with the new value IF the custom field is empty.
   - **Modify Only Records With Specific Value:** This mode will remove all values in a custom field that you type in the Current Field Value box and replace it with what you type in the New Value box.
   - **Add New Value to Existing Values:** This mode will allow you to add a new value to a custom field if it is not already selected for that record.
   - **Add New Value to Existing Values for Records with Specific Values:** This mode will allow you to add a new value to a custom field for records that already have a current value of your choosing.
6. Select the **Field Name** from the dropdown list.
7. **Limit to a Rollup** — This is 'optional' but strongly suggested. If no Rollup is selected, the change will be applied *to the entire database.*
8. Enter a **New Value** for the selected field.

9. In change modes for "specific value," you will be asked to type an existing value in the **Current Field Value** box to work as a matching identifier for your Global Change. This value must be entered exactly as it is stored in the record in order to be detected.
10. After double-checking all of your settings click **Apply** at the bottom of the window. An update window with a progress bar will confirm that your changes have been made. Do not close the window until changes have completed.

Change a Custom Field Name

This option is used for re-naming a Custom Field. It will change the name of the field across all historic records.

1. Click the **System** icon on the Main Toolbar.
2. Click **Global Changes**.
3. Click **Change a Custom Field Name**.
4. Select **Record Type** (Company, Name or Position).
5. Enter the **Current Field Name** exactly as it appears in your database, case-sensitive.
6. Enter the **New Field Name**.
7. After double-checking all of your settings click **Apply** at the bottom of the window. An update window with a progress bar will confirm that your changes have been made. Do not close the window until changes have completed.

Copy a Predefined Field to a Custom Field

In some situations, you may wish to duplicate the contents of a built-in field to a Custom one.

1. Click the **System** icon on the Main Toolbar.
2. Click **Global Changes**.
3. Click **Copy Predefined to Custom Field**.
4. Select the appropriate **Global Change Mode** from the dropdown:
    - **Replace All Values:** This mode will delete all values in the custom field and replace it with the new value that you type in.

- **Modify Only Empty Fields:** This mode will only update records with the new value IF the custom field is empty.
- **Modify Only Records With Specific Value:** This mode will remove all values in a custom field that you type in the Current Field Value box and replace it with what you type in the New Value box.
- **Add New Value to Existing Values:** This mode will allow you to add a new value to a custom field if it is not already selected for that record.
- **Add New Value to Existing Values for Records with Specific Values:** This mode will allow you to add a new value to a custom field for records that already have a current value of your choosing.

5. Select **Record Type** (Company, Name or Position).
6. **Limit to a Rollup** — This is 'optional' but strongly suggested. If no Rollup is selected, the change will be applied *to the entire database.*
7. Select the **Predefined Field** to copy from.
8. Select the **Custom Field** to copy to.
9. Optional: Enter a number for the **Custom Field Sort Order**, which governs the order of appearance for custom fields in a handful of screens.
10. After double-checking all of your settings click **Apply** at the bottom of the window. An update window with a progress bar will confirm that your changes have been made. Do not close the window until changes have completed.

Copy a Custom Field to a Custom Field

Use this tool to mass copy information currently stored in one Custom field to another Custom field.

1. Click the **System** icon on the Main Toolbar.
2. Click **Global Changes**.
3. Click **Copy Custom to Custom Field.**
4. Select the appropriate **Global Change Mode** from the dropdown at the top.

- **Replace All Values:** This mode will delete all values in the custom field and replace it with the new value that you type in.
- **Modify Only Empty Fields:** This mode will only update records with the new value IF the custom field is empty.
- **Modify Only Records With Specific Value:** This mode will remove all values in a custom field that you type in the Current Field Value box and replace it with what you type in the New Value box.
- **Add New Value to Existing Values:** This mode will allow you to add a new value to a custom field if it is not already selected for that record.
- **Add New Value to Existing Values for Records with Specific Values:** This mode will allow you to add a new value to a custom field for records that already have a current value of your choosing.

5. Select **Record Type** (Company, Name, Position, or Placement).
6. **Limit to a Rollup** — This is 'optional' but strongly suggested. If no Rollup is selected, the change will be applied *to the entire database.*
7. Select the **Custom Field** to copy from.
8. Select the **Custom Field** to copy to.
9. Click **Apply**.

Move Multiple Names to a Different Company

Although there is a Change Company option in the Action menu on each Name, you may need to move many names at once.

1. Add the desired names to a Rollup List.
2. Open the list.
3. **Select** all the records to be moved.
4. Click the **Change Company** action, found in the Action menu at the top of the list.
5. Find the company using the **Select Company** dropdown.
6. Review the selections for **Copy Options**, which govern whether the target company's codes and phone numbers should be applied to the names being moved.

7. Click **Change**.

Delete Multiple Records

The deletion of many records at once can be achieved through the use of a Rollup.

1. Add the desired records to a Rollup List.
2. Open the list.
3. **Select** all records to be deleted.
4. Click the **Delete from Database** icon, found in the Action menu at the top of the rollup. Note: This menu also contains a "Remove From Rollup" icon which simply takes the records off of the list - be sure to select the correct option.
5. The 'Place deleted items into recycle bin' box is checked by default. Un-checking this box will irrevocably remove the records. This may speed up the removal of large record sets, but will make retrieving them impossible without a billable restoration of earlier database backups.
6. Click **Delete**.

Move or Copy Records to a Different Database

This process is often used to move inactive records to an ‘archive’ database. You must be a System Administrator with the same User Name, Security Level, and Password in both databases to perform this action.

1. Open a Rollup List containing the records to be moved or copied.
2. **Select** all records to be copied/moved.
3. Choose **Move to Database** or **Copy to Database** from the Action menu at the top of the list. *Copy* duplicates the record in the target database, while *Move* duplicates the record and deletes the original.
4. Select the **Target Database**.
5. Select your **Duplicate Checking Options**.
6. Select **Database Copy Options**

- Recreate Rollup will move the names and also create a list with the same name to associate them with in the Target.
- If Update/Archive is checked and duplicate checking is enabled, the resume on a duplicate in the target database will be moved to the 'Attachments' and replaced with the resume from the record being moved.

7. Click **Move** or **Copy** to execute the change.

Other Multi-Record Changes

There are some less commonly used tools found under SYSTEM > Global Change for atypical or one-time data alterations. Some, such as Bulk Add Keyword and Change User Name are explained in the context of the areas they pertain to. The rest are detailed below.

Separate Plus 4 Zip Codes

PCRecruiter has two ZIP code field options; a "Postal/Zip" and a "Zip+4". If your database contains 9-digit zipcodes (XXXXX-XXXX) stored in the "Postal/Zip" field, running this global change will split the -XXXX portion and migrate it to the +4 storage.

Separate International Postal Codes

This option is only used for converting UK postal codes imported or converted from other formats so that they are compatible with the radius search utility. This operation will split the primary postal code into two, three or four alpha-numeric characters in the Zip database field and the 3-digit second half will be stored in the +4 postal field.

Update Company Address to Name

When given a Rollup of Name records to work with, this utility will copy the Address, City, State, Zip, and Country fields from each Name's parent Company into that Name. This will replace any existing data in the relevant fields on the Name record.

Auto Generate Name ID Field

All Name records in PCR are assigned an Identification. If data has been imported or added in some way which omitted the ID, this utility will apply IDs accordingly.

You may set it to either update only the records with currently blank Identification fields, or to update ALL name records, replacing any value that may currently be in that field.

The "ID Type" options are:

- Use Identification Settings - applies the standard "NA-XXXXXXXXXX" format
- Numeric Order - applies sequential numeric ids beginning with the given number
- Five Digit Alphanumeric - applies random 5-character combinations of letters and numbers
- Five Digit Password - applies random 5-character combinations of letters, numbers, and special characters

Reassociate Position Contacts

The correct method of tying a hiring contact to the Position is by clicking the icon next to the Contact Name field on the Position record and searching for the contact. This fills in the Contact Name, Phone, and Email on the Position and also links the internal record keys for the job and contact together.

If email addresses have simply been manually typed into the Contact Email field on any Positions, this function will locate the Name record with that email and properly link the two records together.

Split Company Email/WWW Field

This feature facilitates splitting values in the *Predefined: Email/WWW Address* field on Company Records into two designated Custom fields. If the field has been used for a mix of emails and web addresses (more common in earlier PCRecruiter databases) this change will move the values based on detecting whether they are email or URL format.

1. Select **System** from the Main Toolbar.
2. Select **Global Change**.
3. Choose **Split Company Email/WWW Field**.
4. **Select Email Custom Field** to choose a field to store your Email values.
5. **Select Site Link Custom Field** to choose a field to store the Website values.
6. Check **Modify Only Empty Fields** to leave any existing data in the target field unchanged.
7. Select **Run** when you are ready to perform the action. This will take a few minutes and varies greatly depending on database size.

NOTE: Some items, such as *Replace Data in Planner Records*, *Copy Interview to Name Activities*, and *Update Job Order Contact Email Address* were related to legacy PCRecruiter versions or data formats and can be ignored.