

Mass Editing Many Records at Once

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As an Administrator, you may need to change information for more than one employee at once, for example:

- switch or add cost centers
- change or add assigned managers
- change or add a work schedule
- edit pay settings
- terminate many employees
- transfer many employees to another EIN
- change many time entries or punches, or add many time entries (including time off)

The *mass edit* capabilities under the **Admin Settings** tab on the main menu lets you do this quickly.

Menu items and on-screen options may vary depending on your configuration and Security Profile.

START HERE

1. From the hamburger menu, click (or enter "mass edit" in the Search field) and expand the **Mass Edit** option.

The screenshot displays the würk HR system interface. At the top, a banner reads "Mass Edit lets you change more than one Employee Profile or Time Entry at once". The main navigation bar includes "Home", "My Dashboard", "Team", "Time", "Accruals", "Benefits", "HR", "Learning", "Payroll", and "Recruitment". A left-hand sidebar menu is open, showing "ADMIN" settings such as "Company Settings", "Our Company", "Profiles/Policies", "Global Setup", "Payroll Setup", "HR Setup", "System", "Imports", and "Mass Edit". The "Mass Edit" option is highlighted with a purple circle and a number "2". Below it, sub-options include "Mass Edit Profiles", "Mass Edit Time Entries - Add", "Mass Edit Time Entries - Edit", and "Mass Edit Time Entries - Punch In/Out". The main dashboard area contains several widgets: "Clock" (showing Wednesday, Jan 15, 10:12 AM), "My Pay" (showing 2 days till next payment), "Time Statistics" (showing 0.00 HRS PERIOD TOTAL), "Timesheet Chart" (a grid for the current week), "My Benefits" (showing "You have no benefit profile"), and "Recruitment" (showing 6 Open Requisitions, with 5 Requisitions Without Applicants).

To change many employees' information including termination or switching EINs, choose **Mass Edit Profiles**.

1 Select the employees you want to mass edit

2 Choose the type of change you want to make

	Employee ID	Badge	Username	First Name	Last Name	Employee EIN	In Payroll	Locked
<input type="checkbox"/>	00122		KWaters11	Katie	Waters	D&D	Yes	No
<input type="checkbox"/>	00126		HLarkin12	Harold	Larkin	D&D	Yes	No
<input type="checkbox"/>	00127		LDubois13	Lauren	Dubois	D&D	Yes	No
<input checked="" type="checkbox"/>	00128		KClarkson14	Kenton	Clarkson	D&D	Yes	No
<input checked="" type="checkbox"/>	00130		ANelson15	Ashley	Nelson	D&D	Yes	No
<input checked="" type="checkbox"/>	00131		TTurner16	Tomas	Turner	D&D	Yes	No
<input type="checkbox"/>	00132		CJones17	Cathy	Jones	D&D	Yes	No
<input type="checkbox"/>	00133		MDonaldson18	Michael	Donaldson	D&D	Yes	No
<input type="checkbox"/>	00134		NReagan19	Nicholas	Reagan	D&D	Yes	No
<input type="checkbox"/>	00135		JJones20	Jennifer	Jones	D&D	Yes	No

If you want to SWITCH PRIMARY EIN for employees, first you need to add the second EIN to their records using the **Transfer EIN HR Action**.

Clicking **MASS EDIT** for selected employees lets you enter new values for most fields on the Employee Information page for each employee.

Fields display only for the information you can mass edit.

Enter new values and then **APPLY CHANGE**

Account Information

Time Zone: [Dropdown]

Pay Information

Default Job: [Dropdown]

Standard Work Day (HH:00): [Input]

Employee Type: [Dropdown]

Pay Type: [Dropdown]

Default Workers Comp Code: [Dropdown]

Payroll Job Title: [Input]

Misc. Fields

Lock Account

Unlock Account

Reset Password

Add To New Hire Export: [Dropdown]

Clear Middle Initial

Clear SSN

Clear Base Compensation

Clear Badge Numbers

Clear Virtual Code Settings

Profiles

Accounts: [Dropdown]

Benefit: [Dropdown] 12/31/1900

Holiday: [Dropdown]

Pay Calculations: [Dropdown] 12/31/1900

Pay Period: [Dropdown]

Pay Prep: [Dropdown] 12/31/1900

Security: [Dropdown]

Timesheet: [Dropdown]

Work Schedule: [Dropdown]

Managers

Manager 1: [Dropdown]

Manager 2: [Dropdown]

Cost Centers

Default Department: [Dropdown]

Default Tax Location: [Dropdown]

Base Compensation

AUTOPAY SCHEDULE

Autopay Schedule: [Dropdown] 12/31/1900

RATE

Rate Table 1: [Input]

Before editing these fields, you should take a look at the individual employee records so that you have an idea of what you are changing values to.

To add time entries for many employees at once, click **Mass Edit Time Entries - Add** from the Mass Edit menu, pick the employees for whom you want to add time entries, and then click **MASS ADD TIME ENTRIES**.

The screenshot shows the 'würk' system interface. On the left, the 'ADMIN' sidebar is visible, with 'Mass Edit' expanded and 'Mass Edit Time Entries - Add' selected. The main area is titled 'COMPANY SETTINGS' and 'Add Time Entries'. A table lists employees with columns: Employee Id, Username, First Name, Last Name, Employee EIN, Employee Status, and Role. A purple box highlights the 'Mass Edit Time Entries - Add' menu item and the 'MASS ADD TIME ENTRIES' button. A callout box with a '1' says 'Select the employees you want to mass edit' pointing to the checkboxes in the table. Another callout box with a '2' says 'Click here' pointing to the 'MASS ADD TIME ENTRIES' button.

Clicking **MASS ADD TIME ENTRIES** for selected employees lets you enter time (or time off) as shown below.

For COVID-19, follow the example below:

The screenshot shows the 'Mass Add Time Entries' form. The form is titled 'New Time Entry Information' and includes sections for 'DATE INFO', 'TIME INFO', and 'ADDITIONAL INFO'. The 'DATE INFO' section has radio buttons for 'One Day' and 'Multiple Days', a 'Date' field, and a checkbox for 'Populate scheduled days ONLY'. The 'TIME INFO' section has 'From', 'To', and 'Total' time fields, and an 'Override Time Zone' dropdown. The 'ADDITIONAL INFO' section has fields for 'Time Off', 'Shift Premium', 'Department', 'Tax Location', 'Meal Adjustment', and 'Jobs (HR)'. A 'NOTE' field is at the bottom. Buttons for 'ADD TIME ENTRIES' and 'CLEAR FIELDS' are at the top right. A callout box says 'New time entry information will apply to each employee you selected.'

To change existing time entries for many employees at once (for instance, to log unexpected time off), click **Mass Edit Time Entries - Edit** from the Mass Edit menu. Pick the employees for whom you want to change

time entries, and click **MASS EDIT TIME ENTRIES**.

Employee Id	First Name	Last Name	Employee EIN	Role	Date	Start	End	Hours	Comment
00122	Katie	Waters	D&D		10/14/2019	07:06a	11:40a	4.57	
00122	Katie	Waters	D&D		10/14/2019	12:05p	02:24p	2.32	
00126	Harold	Larkin	D&D		10/14/2019	08:13a	12:49p	4.60	
00126	Harold	Larkin	D&D		10/14/2019	01:52p	04:33p	2.68	
00127	Lauren	Dubois	D&D		10/14/2019	08:30a	12:42p	4.20	
00127	Lauren	Dubois	D&D		10/14/2019	02:06p	04:49p	2.72	
00130	Ashley	Nelson	D&D		10/14/2019	08:35a	01:20p	4.75	
00130	Ashley	Nelson	D&D		10/14/2019	01:51p	05:30p	3.65	
00131	Tomas	Turner	D&D		10/14/2019	08:13a	12:30p	4.28	
00131	Tomas	Turner	D&D		10/14/2019	01:52p	04:07p	2.25	
Page Total								36.02	

Clicking **MASS EDIT TIME ENTRIES** lets you enter new values for the employee time entries you selected.

DATE INFO
One Day Multiple Days
Date From 03/31/2020 To 04/10/2020
Weekdays Mon Tue Wed Thu Fri Sat Sun
Populate scheduled days ONLY

TIME INFO
From To Total 8.00 Enter the number of hours for each day
Override Time Zone

ADDITIONAL INFO
Time Off COVID-19 Not Paid
Department
Tax Location
Meal Adjustment
Jobs (HR)

NOTE
Store closed this week due to COVID-19

To edit many employees punches at once (for instance, to change the In or Out punch, change cost centers, or rollover a date), click **Mass Edit Time Entries - Punch In/Out** from the Mass Edit menu, pick the employees for whom you want to change punches, and then click **PUNCH**.

BB würk COMPANY SETTINGS

← Punch In/Out

Page 1 of 3 1 - 10 of 26 Rows Saved: [System]

Don't see employees you want to mass edit? Adjust this filter

Columns (1) (1)

	Employee Id	Username	First Name	Last Name	Employee EIN	Employee Status
	starts with	=	starts with	starts with	starts with	=
<input type="checkbox"/>	00122	KWaters11	Katie	Waters	D&D	Active
<input type="checkbox"/>	00126	HLarkin12	Harold	Larkin	D&D	Active
<input type="checkbox"/>	00127	LDubois13	Lauren	Dubois	D&D	Active
<input checked="" type="checkbox"/>	00128	KClarkson14	Kerton	Clarkson	D&D	Active
<input checked="" type="checkbox"/>	00130	ANelson15	Ashley	Nelson	D&D	Active
<input checked="" type="checkbox"/>	00131	TTurner16	Tomas	Turner	D&D	Active
<input checked="" type="checkbox"/>	00132	CJones17	Cathy	Jones	D&D	Active
<input type="checkbox"/>	00133	MDonaldson18	Michael	Donaldson	D&D	Active
<input type="checkbox"/>	00134	NReagan19	Nicholas	Reagan	D&D	Active
<input type="checkbox"/>	00135	JJones20	Jennifer	Jones	D&D	Active

Home Dashboard

Clicking

PUNCH lets you enter new values for the employee punches you selected.

Mass Add Manual Punch

Add manual punch for 5 employee(s).

PUNCH

Type

Date

Time

Time Zone Local Time May Differ Same Universal Time

Enter new values and then **Preview** or **Punch**