

Chronologic Training – User Defined Fields

1.0 Contents

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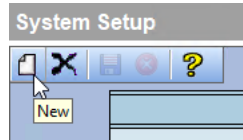
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Start here...

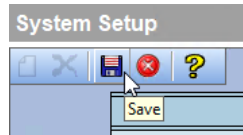
Access the Setup Screen here
System/System Setup/User Fields

1.1 Adding a New Field

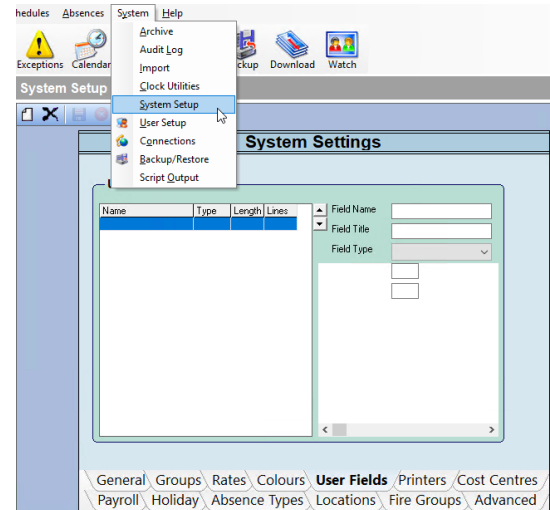
Click on the New Icon to create a new field. Clicking on an existing field allows you to edit it.



When the fields are showing in yellow you are in edit mode.



Click on the Save Icon to save the record.



1.2 Field Variables

Field Name

This is the name of the database table field and therefore cannot have any spaces or strange characters. Use an underscore or hyphen to separate words to make it easier to read them if you need to.

Field Title

This is the text that will show next to the field you have created.

Field Type

This drop down lets you define the type of field you are going to create.

Other Variables

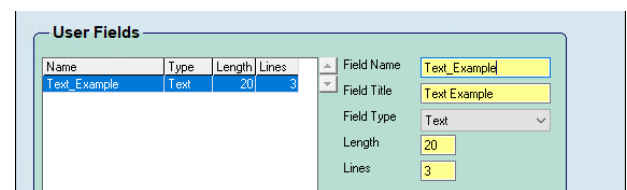
These vary depending on the type of field you are creating.

1.3 Field Types

Text

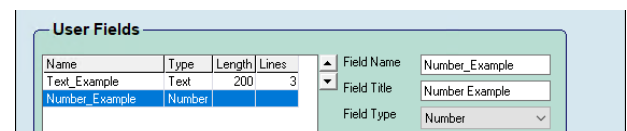
Length - Choose the number of characters that you want to be able to type into the text field.

Lines – enter how many rows of text to show.



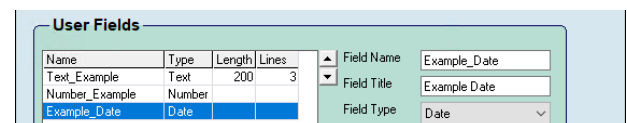
Number

No options here, just choose the correct type of field.



Date

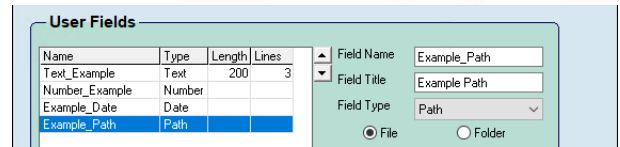
No options here, just choose the correct type of field.



Path

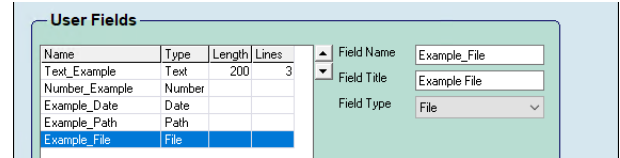
Choose whether you want to create a path to a particular file or a folder full of files.

This can be used if you have either a particular document that you want to link to that is on the server somewhere, File, or a folder full of files, Folder.



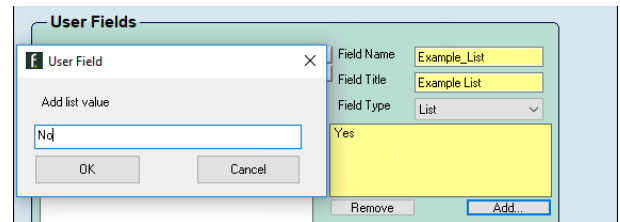
File

This enables you to embed a file into the database directly without it needing to be in a folder on the server.



List

Here you can define a list of items that can be selected from that list for each employee. Useful to stop typos when inputting data ensuring that reports are accurate.



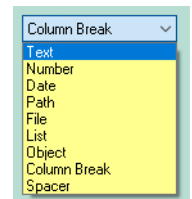
Click on Add and type in a list value and then click OK. Once you have entered all the values you want in the list click Save.

Object

This is an advanced option that isn't normally used. It allows programming script to be added to create lists or options based on existing database data. Contact us if you think you need this option.

Column Break

Each Employee User Field tab has two columns. This moves the following fields on to the next column before they automatically scroll due to the first column being full.



Spacer

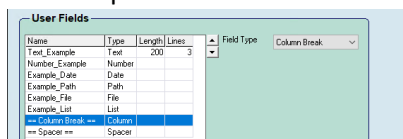
This is used to help line up fields in the two columns for ease of use/viewing.

1.4 Moving Fields Around

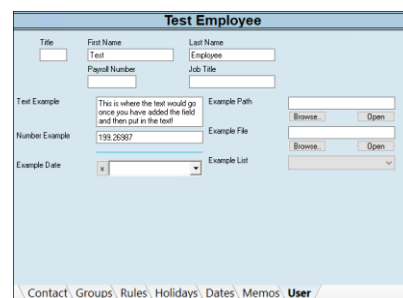
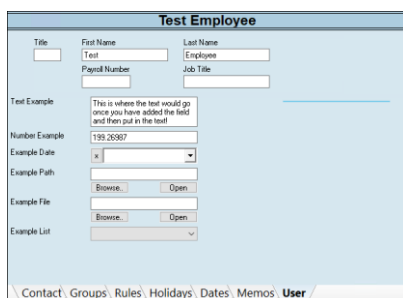
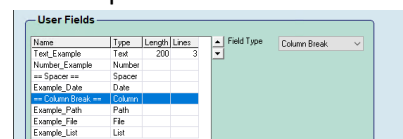
Select the field you want to move and then use the up and down arrows in the middle to move them up and down the list. This will make them move on the employee screen.



Example 1



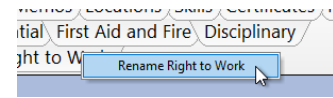
Example 2



Check out the relative positions of the Column Break and the Spacer between the two examples.

1.5 Renaming Tabs

Once you have created multiple tabs by adding fields and using the column breaks and spacers if necessary, you can rename the tabs by Right Clicking on them and editing the name.



1.6 NB – Save yourself a lot of reordering work!

If you enter the fields in the order that you want them to appear on the system (in the Tab order that you want) then you don't have to move them around a lot.

1.7 Reporting on the Fields you have entered

Creating Custom HR Reports

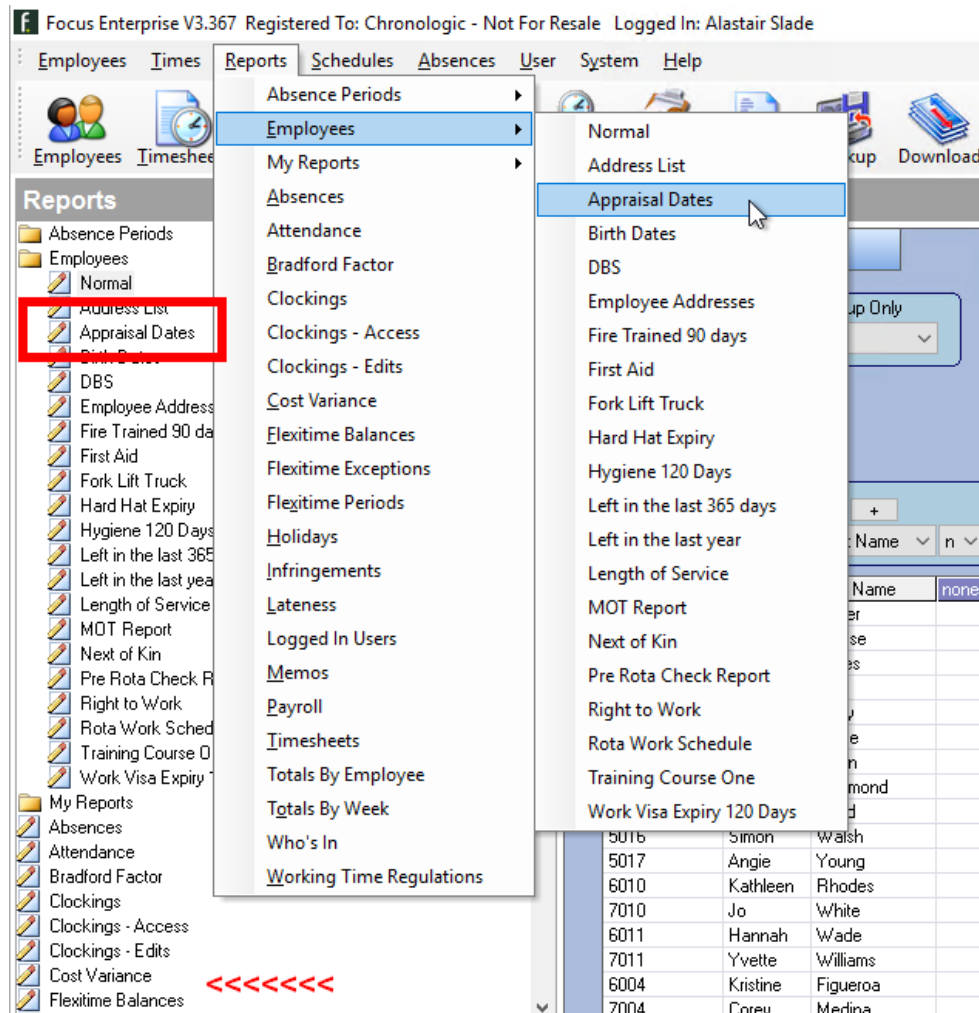
The Employees report allows you to specify the content and order of the columns (as well as the sort order) and save those settings for use later without needing to re-select the criteria.

You can also filter by date fields – see below.

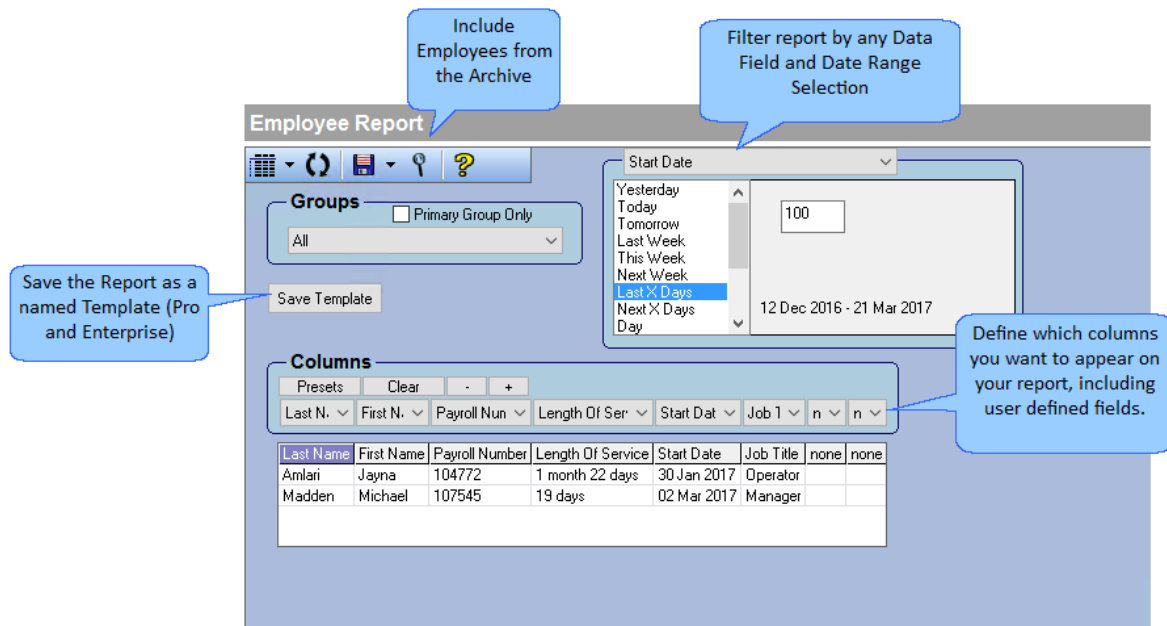
Access the Employees report using the **Reports** icon or drop down.

If you are yet to save off a template then the report is in the alphabetical list in the gap shown here by the red arrows.

Once you have saved off a report the **Normal** report can be chosen as a standard starting point.



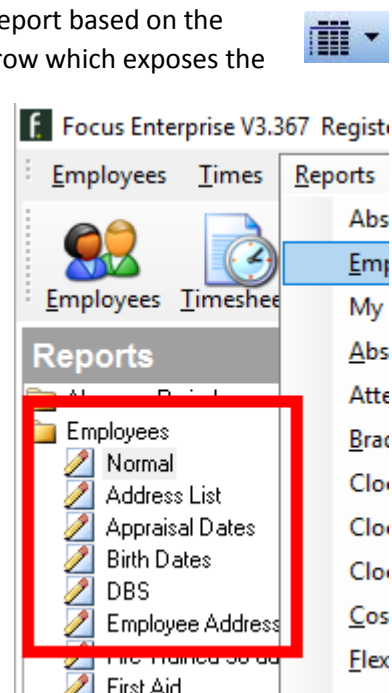
Each drop down box exposes the list of available column (or field) types, including the full list of User Defined Fields. Select 'none' if you want the column to be blank in which case it takes up no room on the report. Column widths can be altered by dragging on the column title. The 'Presets' button sets the columns to their default state, which produces a quick and easy basic Employee List Report. The 'Clear' button sets all columns to 'none'.



Click on the left hand side of this button to get a standard List Report based on the columns you have chosen or click on the downward pointing arrow which exposes the choice of either the List Report or a Detail Report which uses one page per employee and is of fixed format (i.e. is not controlled by your set up of columns).

Saving your reports for later use

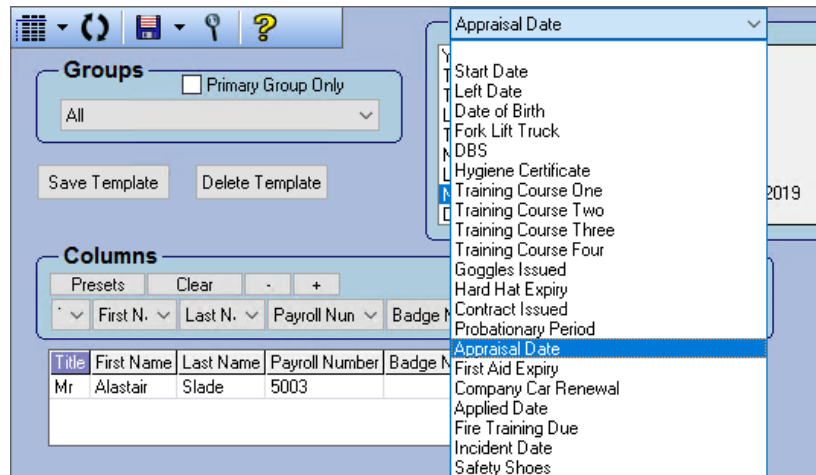
The Report can be saved using the Save Template as a named public or private Template and it then appears under the list of Focus Employee reports in the Employees folder.



Using Date Filters

You can filter the data in the report using the date fields in the system including the UDF date fields that you have created in System Setup as detailed above.

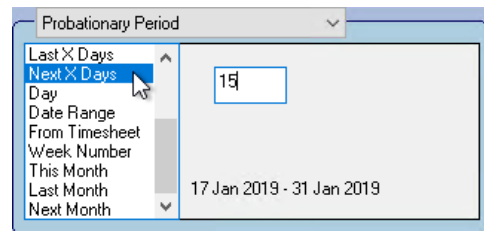
Once you have selected the date you wish to filter under then choose a date range to filter by using the options below.



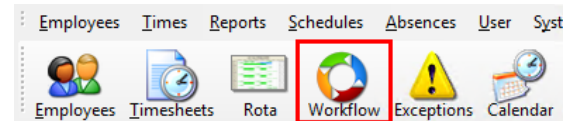
Use things like Last Month and Next X Days to always look at the same periods relative to today without needing to select specific dates each time.

Scroll up and down to find all the options.

If you want automatic emails for this kind of thing then use the Workflow module in the system.



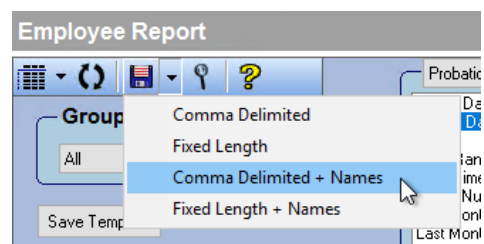
If you don't see the Workflow module icon then contact Chronologic for pricing details.



Raw Data Exports

You can also use the Save As option to save the data off in CSV format for using the data in spreadsheets or for importing into other applications.

Use the Comma Delimited + Names option for CSV with headers.



1.8 Version Control

1.1

- Renaming Tabs added.
- Version Control added.
- Save yourself... added.

1.2

- Reporting added.