EmployeeConnect

Work. Flow. Smarter.

How to Use the Edit Pencil Button in EmployeeConnect.

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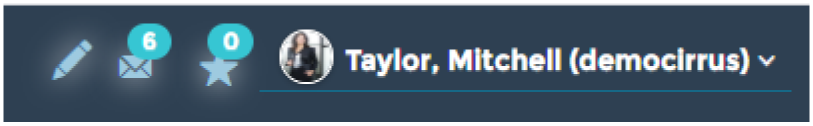
Introduction

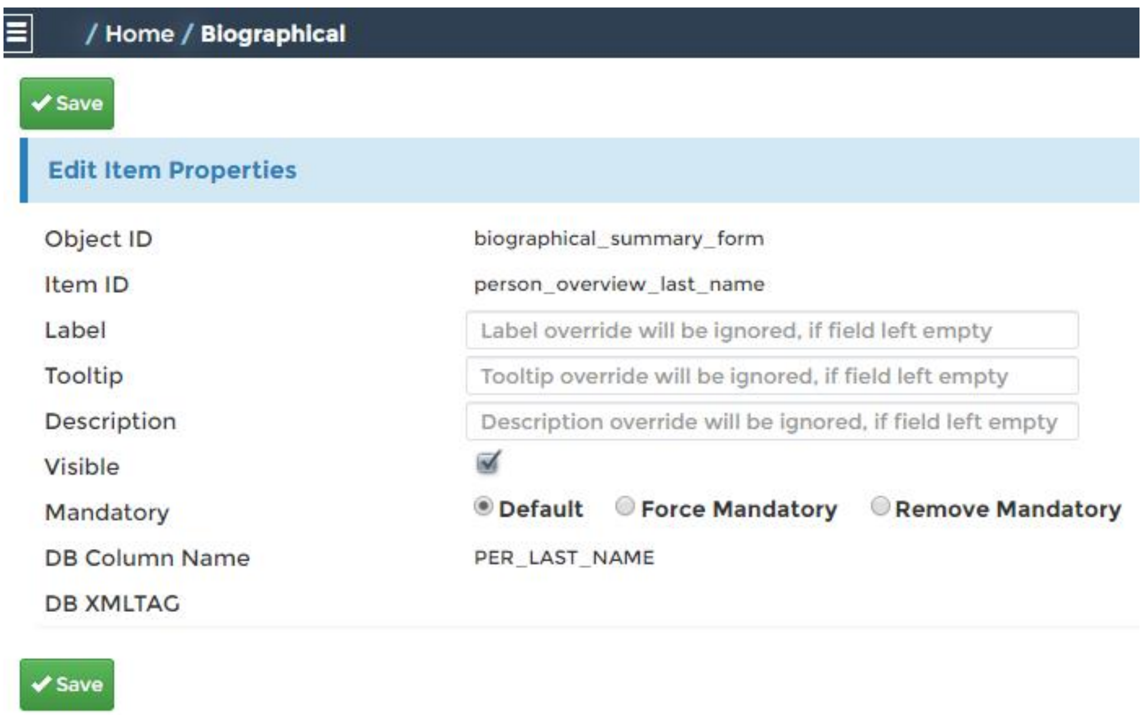
EmployeeConnect is a feature rich application with different forms to cater to your HR needs. A such, we can expect these forms to have a lot of different fields. EmployeeConnect gives your Admin flexibility in modify field names to match your paper-based forms without paper!

Edit Pencil Button

The Edit Pencil allows you to modify the field names seen on each individual form. This button can be located at the top right corner of your screen, near your avatar, on most forms you visit in EmployeeConnect. Please refer to the screenshot below:

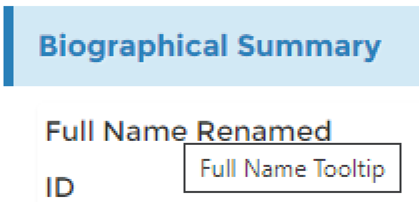


Edit Item Properties



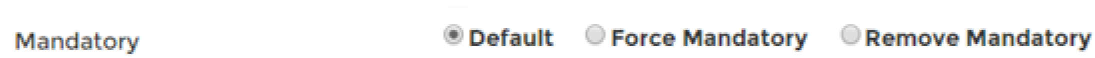
- Label – label name that appears on the form/report UI.

- Tooltip – hint that appears on the field when you hover over it. The sample below shows "Full Name Tooltip" that I keyed in, this appears every time I hover over the field.



- Description – allows you to enter a short description for your text fields. This is not meant to be displayed on the form but will give you an idea of what the field is when you edit the field using the pencil button.

The Edit Pencil button also allows you to set the field up as a required field in the form. Very helpful for information or data you want to have their before allowing employee's to submit the form, this makes sure all info you require will be completed the first time.



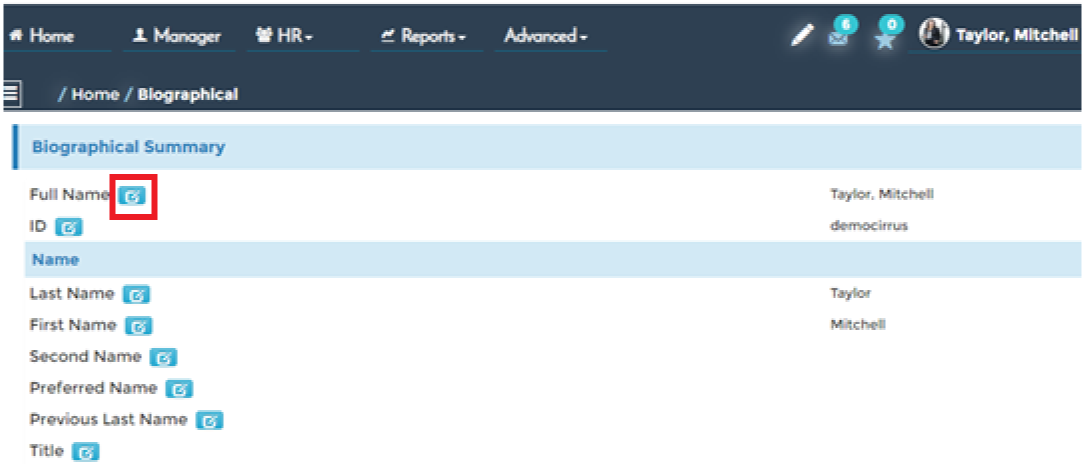
Settings are:

- Default – Use the EmployeeConnect standard setting leaving it as is
- Force Mandatory – Set the field as a Required field
- Remove Mandatory – Remove the field requirement if set as a required field by default or previously

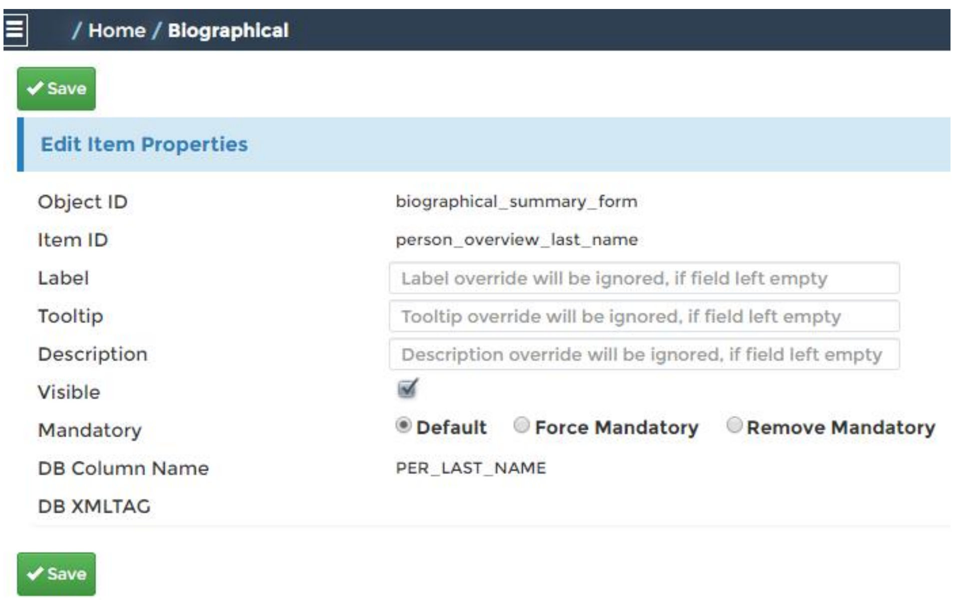
You can hide fields you do not need on the form. Untick the Visible tick box to hide the field as seen below: Please be doubly sure if you wish to hide a field, once hidden it will not appear on the form and will require a consultant to check the meta data to revert the change.

How to Use the Edit Pencil Button to edit Forms

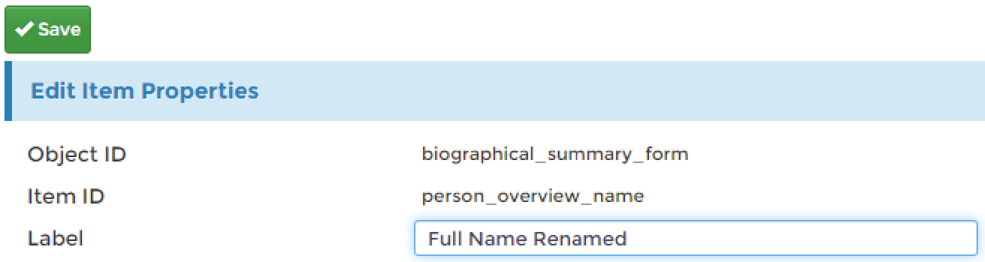
1. Navigate to the form of interest
2. Click the Edit Pencil button



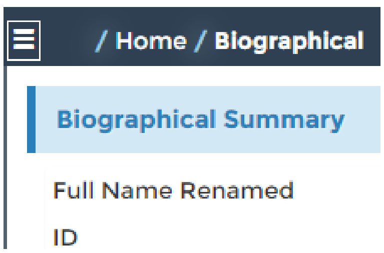
3. Click on the blue button beside the field you wish to modify
4. Edit Item Properties now appear



5. You have the option to edit the field label, this is what is displayed in the UI, Tooltip and Description.
6. Input your changes



7. Click Save
8. Form will refresh and changes will be reflected

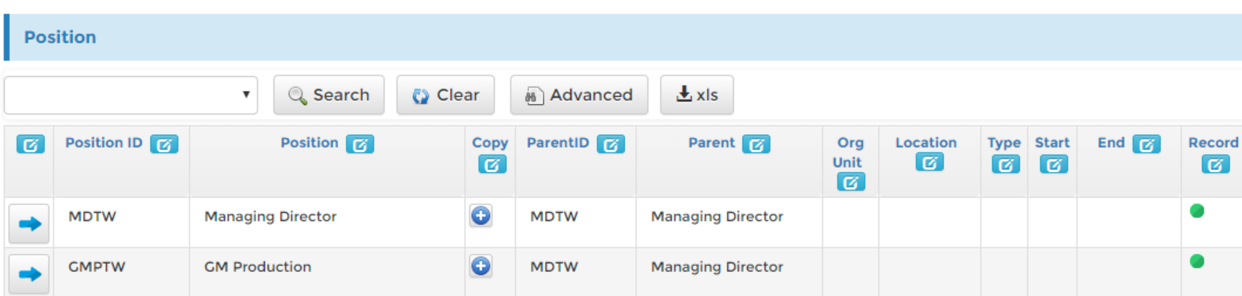


This Edit Pencil button can make most changes to field labels in the kiosk. You can change Tab names etc. Please contact your EmployeeConnect consultant if you wish to modify a field name but do not see the blue icon when using the Edit Pencil button.

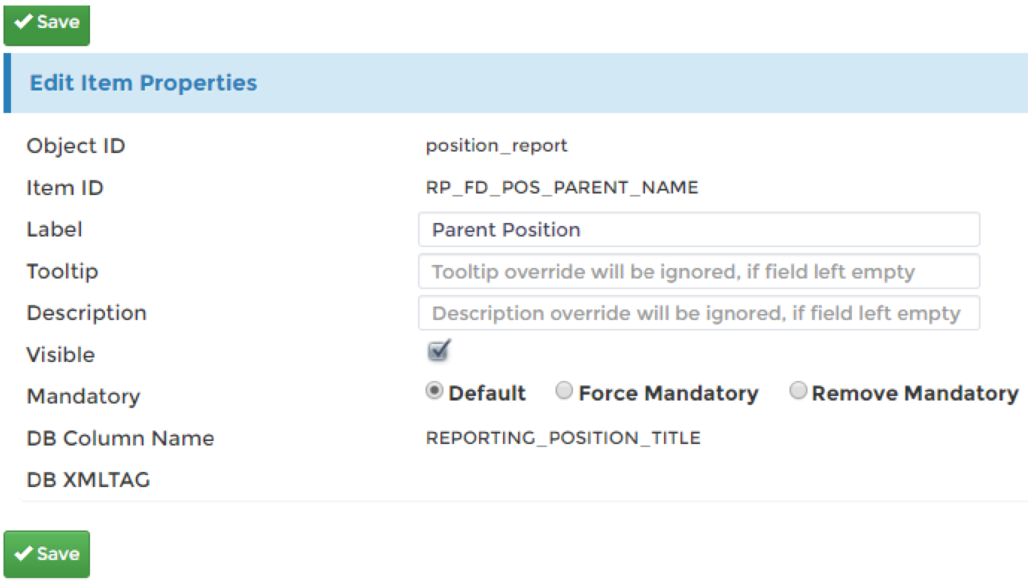
How to Use the Edit Pencil Button to Edit Report Headers

The steps below will show you how to modify the report column headers in EmployeeConnect, this is very helpful when our default naming conventions do not exactly match those of your own. These changes will also carry over when you download the report in excel.

1. Navigate to the report of interest
2. Click the Edit Pencil button



3. Modify the Label/Tooltip/Description as desired



4. Click Save
5. Download the report via the XLS download button

You can hide a report column by unticking the visible tickbox similar to hiding a field.

This will effectively remove that column from the report view. Please be careful as the hidden items will need to be checked from the meta data when you do hide them using the visible tick box.