



EmployeeConnect
Work. Flow. Smarter.

How to Use the Edit Pencil Button in EmployeeConnect.

Table of contents

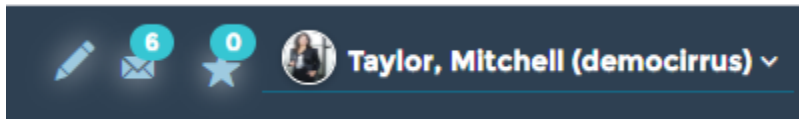
Introduction	2
Edit Item Properties	2
Edit Pencil Button	3
How to Use on Forms	4
How to Use on Reports	5

Introduction

EmployeeConnect is a feature rich application with different forms to cater to your HR needs. As 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

/ Home / Biographical

Edit Item Properties

Object ID	biographical_summary_form
Item ID	person_overview_last_name
Label	<input type="text" value="Label override will be ignored, if field left empty"/>
Tooltip	<input type="text" value="Tooltip override will be ignored, if field left empty"/>
Description	<input type="text" value="Description override will be ignored, if field left empty"/>
Visible	<input checked="" type="checkbox"/>
Mandatory	<input checked="" type="radio"/> Default <input type="radio"/> Force Mandatory <input type="radio"/> Remove Mandatory
DB Column Name	PER_LAST_NAME
DB XMLTAG	

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

Label

2nd Name

New Name

Last name

First name

2nd Name



EmployeeConnect
Work. Flow. Smarter.

- **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.

Biographical Summary

Full Name Renamed

ID

Full Name Tooltip

- **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.

Description

SName Description

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.

Mandatory

☒ Default

☐ Force Mandatory

☐ Remove Mandatory

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.

Visible



How to Use the Edit Pencil Button to edit Forms

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

The screenshot shows the 'Biographical Summary' form in EmployeeConnect. The top navigation bar includes 'Home', 'Manager', 'HR', 'Reports', and 'Advanced'. The user 'Taylor, Mitchell' is logged in. The form fields include 'Full Name' (highlighted with a red box and a blue pencil icon), 'ID', 'Name', 'Last Name', 'First Name', 'Second Name', 'Preferred Name', 'Previous Last Name', and 'Title'. The values for 'Full Name' and 'ID' are 'Taylor, Mitchell' and 'democirrus' respectively.

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

The screenshot shows the 'Edit Item Properties' dialog box. It contains the following fields and options:

- Object ID: biographical_summary_form
- Item ID: person_overview_last_name
- Label: Label override will be ignored, if field left empty
- Tooltip: Tooltip override will be ignored, if field left empty
- Description: Description override will be ignored, if field left empty
- Visible: ☒
- Mandatory: ☒ Default ☐ Force Mandatory ☐ Remove Mandatory
- DB Column Name: PER_LAST_NAME
- DB XMLTAG: (empty)

There are two green 'Save' buttons at the top and bottom of the dialog.

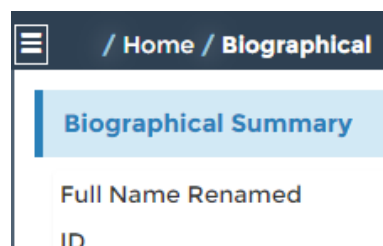
5. You have the option to edit the field label, this is what is displayed in the UI, Tooltip and Description.
6. Input your changes

 Save

Edit Item Properties

Object ID biographical_summary_form
 Item ID person_overview_name
 Label Full Name Renamed

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

Position

Search


Clear

Advanced

Download xls

<div><div></div></div> Position ID <div><div></div></div>	Position <div><div></div></div>	Copy <div><div></div></div>	ParentID <div><div></div></div>	Parent <div><div></div></div>	Org Unit <div><div></div></div>	Location <div><div></div></div>	Type <div><div></div></div>	Start <div><div></div></div>	End <div><div></div></div>	Record <div><div></div></div>
<div><div></div></div> MDTW	Managing Director	<div><div></div></div>	MDTW	Managing Director						<div><div></div></div>
<div><div></div></div> GMPTW	GM Production	<div><div></div></div>	MDTW	Managing Director						<div><div></div></div>

3. Modify the Label/Tooltip/Description as desired



Edit Item Properties

Object ID	position_report
Item ID	RP_FD_POS_PARENT_NAME
Label	<input type="text" value="Parent Position"/>
Tooltip	<input type="text" value="Tooltip override will be ignored, if field left empty"/>
Description	<input type="text" value="Description override will be ignored, if field left empty"/>
Visible	<input checked="" type="checkbox"/>
Mandatory	<input checked="" type="radio"/> Default <input type="radio"/> Force Mandatory <input type="radio"/> Remove Mandatory
DB Column Name	REPORTING_POSITION_TITLE
DB XMLTAG	



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.

Visible ☒

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.