Time and Labor (T&L)

HR CSR
Using View Folders – Assignment Folder

DoDEA R12 Work Instructions
Document Control

Change Record

<table>
<thead>
<tr>
<th>Date</th>
<th>Author</th>
<th>Version</th>
<th>Change Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>13-May-2013</td>
<td>Robin Hardy</td>
<td>V1.1</td>
<td>Upgraded for R12</td>
</tr>
</tbody>
</table>

Reviewers

<table>
<thead>
<tr>
<th>Date</th>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>02-Jun-2014</td>
<td>Dave Macon</td>
<td>Global Model Team Member</td>
</tr>
<tr>
<td></td>
<td>Bill Mohamed</td>
<td>Workforce Preparation Training Lead</td>
</tr>
</tbody>
</table>

Distribution

<table>
<thead>
<tr>
<th>Copy No.</th>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>DODEA_R12 HR CSR Using View Folders – Assignment Folder</td>
<td>DEPS</td>
</tr>
</tbody>
</table>

Note To Holders:

If you receive an electronic copy of this document and print it out, please write your name on the equivalent of the cover page, for document control purposes.

If you receive a hard copy of this document, please write your name on the front cover, for document control purposes.
Table of Contents

DOCUMENT CONTROL ........................................................................................................................................... II
BUSINESS PROCESS DESCRIPTION .................................................................................................................. 1
VIEWING, MANIPULATING AND EXPORTING A LIST OF ASSIGNMENTS .................................................... 2
  Query the Assignment Folder ......................................................................................................................... 3
  Show / Hide Fields ......................................................................................................................................... 5
  Change Field Prompts ................................................................................................................................. 8
  Change Field Width (Widen or Shrink) ........................................................................................................... 9
  Save Folders .................................................................................................................................................. 11
  Open a Newly Created Folder ....................................................................................................................... 12
  Delete a Folder View ..................................................................................................................................... 14
  Folder Tools Toolbar Icon ........................................................................................................................... 15
Business Process Description

Folder Tools provides the option to redisplay the DAI form in a more usable format to the end user. The newly created form views are accessible from the Open Folder icon when available on the DAI form. This work instruction will explain how to development, publish and delete form views utilizing the menu bar. In addition, Custom Folder Views can be accomplished by using the Folder Tools icon as described on the last page of this work instruction.

Some of the benefits of using Folder Tools include:
- Accessibility - provides quick access to previously created form views established using the Folder Tools options.
- Ease of Use – Single click of the Open Folder icon to view all personal and publicly created views.
- Flexibility – The form is moderately customizable allowing to:
  - Add new columns to the existing form
  - Adjust the column size (increase or decrease)
  - Change the naming convention of the column heading
  - Hide current columns
  - Reposition columns

The Assignment folder is a form view of assignment data contained within DAI. Some practical uses of the Assignment folder include:
- Provide information for EEO or other federal government requirements
- Provide information to internal authorities such as supervisors or branch chiefs
- Produce an Assignments list displaying pertinent information such as:

<table>
<thead>
<tr>
<th>Column Heading</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group</td>
<td>Graded or Ungraded employees with employee type codes</td>
</tr>
<tr>
<td>Job</td>
<td>Job name</td>
</tr>
<tr>
<td>Organization</td>
<td>Various internal departments</td>
</tr>
<tr>
<td>Position</td>
<td>Job # code with description</td>
</tr>
</tbody>
</table>

In this work instruction, we will use the Assignment Folder option to customize a view on a list of employees and their corresponding assignment information.

Prerequisites
- Person and Assignment records exist

Responsibilities
- HR CSR – DODEA

Menu Path
Use the following menu path(s) to begin this task:
- View ➔ Lists ➔ Assignment Folder
# Viewing, Manipulating and Exporting a List of Assignments

1. Start the task using the responsibility and menu path to open the **Assignment Folder** form:

   **Responsibility:** HR CSR – DODEA  
   **Menu Path:** View → Lists → Assignment Folder

![Diagram of FastPath](image-url)

- Tour of Duty
- People
- FastPath
- View
  - Employee Accruals
  - Employee Balances
  - System Messages
- Histories
- Lists
  - People Folder
  - Assignment Folder
    - People by Assignment
    - Assignments
    - Workforce by Organization
    - Employees by Element
    - People by Special Information
## Query the Assignment Folder

2. **Select Assignment** – Select the appropriate radio button on the *Assignment Folder form*. Select **Current** in the *Assignments* box. Options are:
   - **Current** – current assignments
   - **Past** – past assignments
   - **Both** – both current and past assignments

3. **Query Assignments** - Press the F11 key to start the query. The fields that are able to be queried will turn blue indicating the form is in query mode.
   - Select in the *Position* field and enter a % sign in the field.
   - Select in the *Grade* field and enter %12 in the field.
   - Press Ctrl + F11 to activate the query.

In this example, we have queried on the **Position** and **Grade**, the query will display all GS12’s with their associated position code and position name.

**Note**: Wildcards (%) may be used within the search criteria. Enter search criteria in one field or several fields. Remember entering multiple field search criteria, may limit the records displayed in the search. Press the F4 key to cancel the query.
Reposition Query Results Columns

4. **Query Results**: Scroll the form column headings left to right to view all columns. Identify column headings that are commonly viewed in order to move those columns to the immediate display area by creating a custom view of the Assignment form.

- Click in the column marked **Organization**, place your cursor in the heading area and look for the 4 sided arrows then left click and drag the column to the left, positioning it beside the column marked **Type**.
- Click in the column marked **Position**, place the cursor in the heading area and look for the 4 sided arrows, left click and drag the column to the left positioning it beside the column marked **Organization**.
- Click in the column marked **Grade**, place the cursor in the heading area and look for the 4 sided arrows, left click and drag the column to the left positioning it beside the column marked **Position**.

**Note**: Place your cursor in the column field prior to moving the column to be repositioned. This will keep the form in a stable view. The **Folder** menu bar has the options **Move Right** or **Move Left** in order to move columns right or left in the form as needed.
Using View Folders
Defense Agencies Initiative

Show / Hide Fields

5. **Show Fields Columns**: Select in the **Full Name** column, the newly added column will default to the right.
   - Click on **Folder** in the Menu bar and scroll to select **Show Field**. The **Show Field** box will display showing the additional columns that can be added to the form view.

6. **Select Column**: Select **Employee Number** and click the **Ok** button to add the **Employee Number** column to the form.
   
   **Note**: The added column will default to the right of the selected column.
Using View Folders
Defense Agencies Initiative

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Employee Number</th>
<th>Type</th>
<th>Organization</th>
<th>Position</th>
<th>Grade</th>
<th>Assignment Number</th>
<th>Title</th>
<th>Last Name</th>
<th>FIr</th>
</tr>
</thead>
<tbody>
<tr>
<td>REYNA, JOSÉ J.</td>
<td>10565</td>
<td>Employee</td>
<td>DHA HEALTH INFORMATION T</td>
<td>05249 SUPV IT SPEC</td>
<td>GS 12</td>
<td>10565</td>
<td></td>
<td>REYNA</td>
<td>J</td>
</tr>
<tr>
<td>LUCÍ, DEVERE</td>
<td>10557</td>
<td>Employee</td>
<td>DHA HEALTH INFORMATION T</td>
<td>11106 NSRC CONSULT T</td>
<td>GS 12</td>
<td>10557</td>
<td></td>
<td>LUCÍ</td>
<td>D</td>
</tr>
<tr>
<td>ANDR, KIMBER</td>
<td>10573</td>
<td>Employee</td>
<td>DHA PROGRAM OPERATIONS</td>
<td>11236 HEALTH SYS SPEC</td>
<td>GS 12</td>
<td>10573</td>
<td></td>
<td>ANDR</td>
<td>K</td>
</tr>
<tr>
<td>HARPER, BRENNY</td>
<td>10609</td>
<td>Employee</td>
<td>DHA MEDICAL LOGISTICS - KI</td>
<td>DPCA INVENTORY MANAGEM</td>
<td>GS 12</td>
<td>10609</td>
<td></td>
<td>HARPER</td>
<td>B</td>
</tr>
<tr>
<td>MART, ANNE T</td>
<td>10610</td>
<td>Employee</td>
<td>DHA MEDICAL LOGISTICS - KI</td>
<td>J05A SUP SYS ANF</td>
<td>GS 12</td>
<td>10610</td>
<td></td>
<td>MART</td>
<td>A</td>
</tr>
</tbody>
</table>
7. **Hide Column**: Select in the field marked **Title**.
   - Click on **Folder** in the Menu bar and scroll to select **Hide Field**. The selected column will disappear from view on the form.
   
   **Note**: Return to Step 5 & 6 within these instructions to restore the column.

8. View the form, the **Title** column has been removed. To remove additional fields, repeat **Step 7** for each column to be hidden.
### Change Field Prompts

**9. Change Column Name:** Select in the column heading **Employee Number**.
   - Click **Folder** in the Menu bar and scroll to select **Change Prompt**

**Note:** An additional option is to right click on the column heading to display the Change Prompt box.

**10. Enter New Name:** Enter **Empl No.** in the **Prompt** field.

**Note:** If any form is being exported to Excel and merged together with other exported forms, it is recommended NOT to move, hide, rename or delete column headings.

**11. Click the **OK** button to change the column heading.**
Using View Folders
Defense Agencies Initiative

The field prompt has been changed to the new prompt value. Repeat Steps 9-11 to rename additional columns

Change Field Width (Widen or Shrink)

To utilize the column spacing it may be necessary to widen the column width or shrink the column width to display more data or more columns of data.
12. Select in the **Organization** column in order to widen the column to view the entire field of data.
   Position the cursor to display a two sided arrows between the **Organization** column and the **Position** column.
   Left click and drag the side of the column heading to the desired size.

13. Select in the **Empl No.** column in order to shrink the column to remove the blank space.
   Position the cursor to display a two sided arrows between the **Empl No.** column and the **Type** column.
   Left click and drag the side of the column heading to the desired size.

**Note:** An additional option to increase or decrease a column size is to select Folder in the menu bar and scroll to select Widen Field or Shrink Field. This will increase or decrease the column size by about the width of 3 letters for each time selected.
The customized view is prepared and should be saved for future use.

14. Click on Folder in the menu bar and scroll to select Save As… to display the Save Folder box.

15. • Select in the Folder field and enter Assignment Folder Org, Pos, Gr12 View title naming the customized view.
• Click the radio button for Never
• Click the OK button

Autoquery features:
<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Always</td>
<td>Includes the query used in creating the current data display</td>
</tr>
<tr>
<td>Never</td>
<td>Does not include the query with the folder display</td>
</tr>
<tr>
<td>Ask each time</td>
<td>Prompted upon opening the folder to run the query</td>
</tr>
</tbody>
</table>

Note: For queries that take a long time to run, it may be preferable to set the Autoquery to Never or Ask each time.

Additional features:
<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open as Default</td>
<td>Set to display when the Assignment Folder form is opened</td>
</tr>
<tr>
<td>Public</td>
<td>Make this custom view available to all</td>
</tr>
<tr>
<td>Include Query</td>
<td>Executes the query when displaying this view</td>
</tr>
<tr>
<td>Show Query button</td>
<td>Folder Query box displays the query statement</td>
</tr>
</tbody>
</table>
The new Folder View displays and is save for future use.

**Open a Newly Created Folder**

To open previously saved folder view using the folder icon.

Click on the Open folder... icon to display a list of saved folders views.
17. Select a folder name from the list or use the Find search feature
• Click the OK button to display the selected view.

**Note:** The folder name appears next to the folder icon, indicating the folder currently being viewed.
Delete a Folder View

18. Click on Folder in the Menu bar and scroll to select Delete. The **Delete Folder** box displays.

19. Select the **Folder View** name to be removed and click the **OK** button. The name is removed permanently from the list.

**Result**

**Congratulations!** You have successfully created, modified and deleted custom folder views for the Assignments Folder option. Close all forms to return to the Navigator.
Folder Tools Toolbar Icon

Select the Folder Tool icon in the Tool bar to have access for the following options to use in lieu of the same options under the Menu bar.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open…</td>
<td>Opens the Open Folder box to display or Find the previously saved folder views</td>
</tr>
<tr>
<td>Save</td>
<td>Allows a Save option for a folder view that has been adjusted to a personalized view</td>
</tr>
<tr>
<td>New…</td>
<td>Opens the Save Folder box in order to complete a personalize folder view</td>
</tr>
<tr>
<td>Delete…</td>
<td>Opens the Delete Folder box in order to remove folder views that are no longer necessary</td>
</tr>
<tr>
<td>Widen Field</td>
<td>Widen Field allows the column to be increase in size</td>
</tr>
<tr>
<td>Shrink Field</td>
<td>Shrink Field allows the column to be decreased in size</td>
</tr>
<tr>
<td>Show Field…</td>
<td>Opens the Show Field box to allow selecting a New column to be added to the form view</td>
</tr>
<tr>
<td>Hide Field</td>
<td>Immediately removes the column that is selected off of the form view</td>
</tr>
<tr>
<td>Move Left</td>
<td>Moves the selected column to the left</td>
</tr>
<tr>
<td>Move Right</td>
<td>Moves the selected column to the right</td>
</tr>
</tbody>
</table>