Time and Labor (T&L)

HR CSR
Using View Folders – Assignment Folder

DoDEA R12 Work Instructions

Document Control

Change Record

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Distribution

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1	DODEA_R12 HR CSR Using View Folders – Assignment Folder	DEPS

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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:

Column Heading	Description
Group	Graded or Ungraded employees with employee type codes
Job	Job name
Organization	Various internal departments
Position	Job # code with description

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
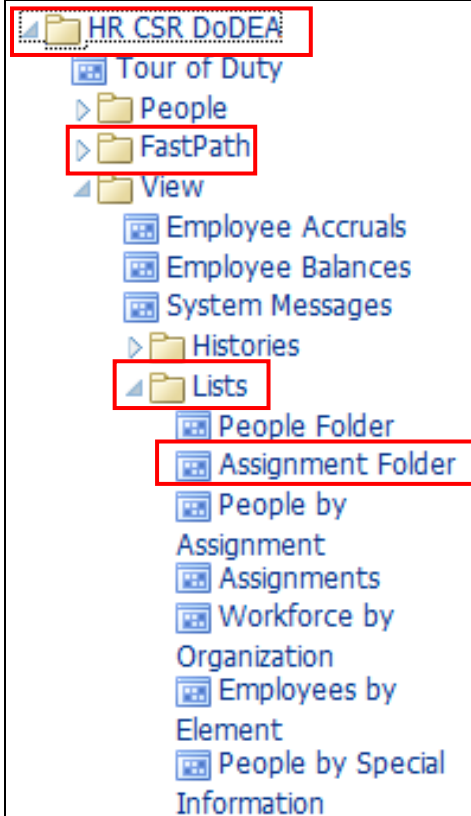- HR CSR – DODEA

Menu Path
Use the following menu path(s) to begin this task:
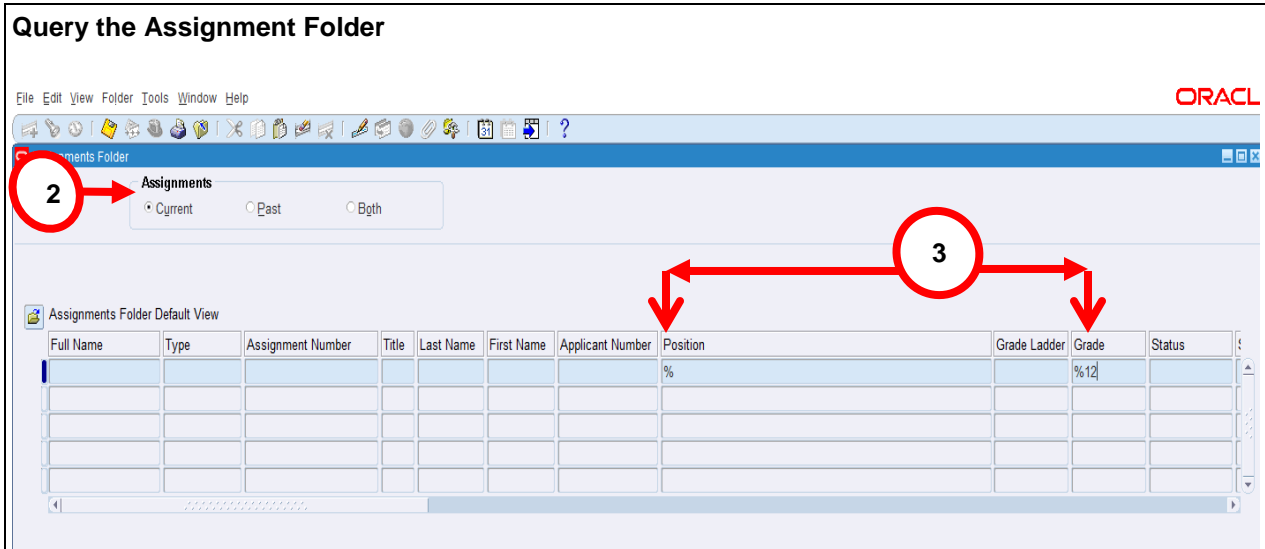- View → Lists → Assignment Folder

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

HR CSR DoDEA
- 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
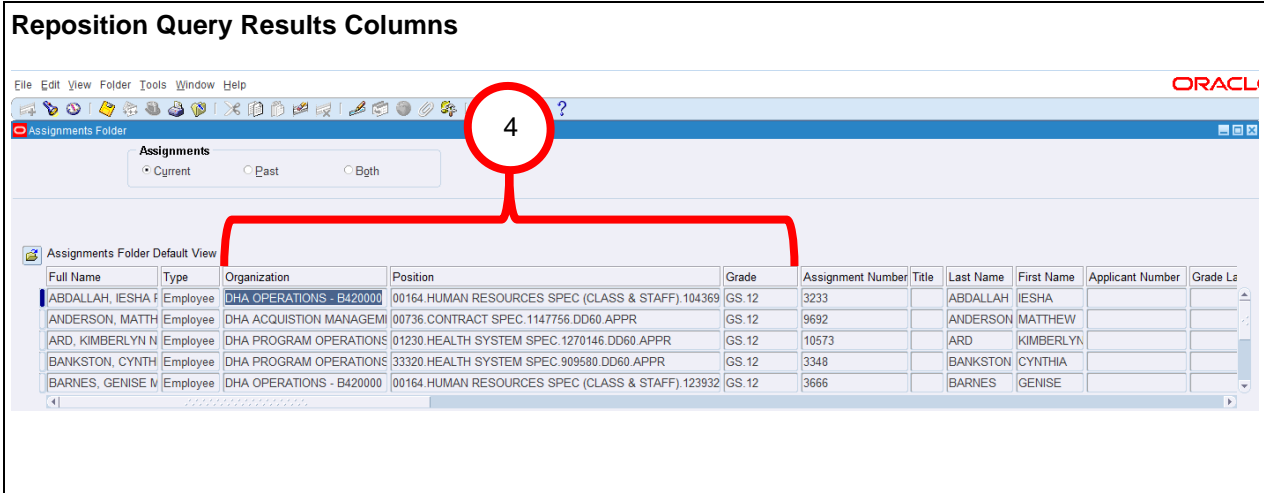
4.	**Query Results**: Scroll the form column headings left to right to view all columns. Identify column headings that are commonly viewed in order to move those columns to the immediate display area by creating a custom view of the Assignment form.
	• Click in the column marked **Organization**, place 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.

Show / Hide Fields
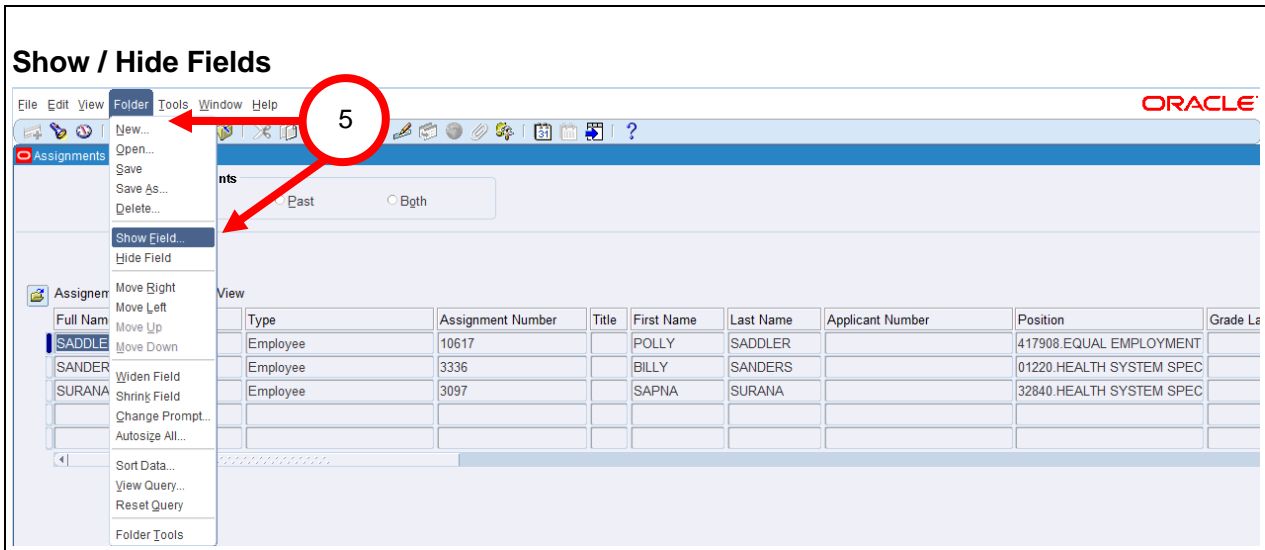
5.	**Show Fields Columns:** Select in the **Full Name** column, the newly added column will default to the right.
	• Click on **Folder** in the Menu bar and scroll to select **Show Field**. The **Show Field** box will display showing the additional columns that can be added to the form view.
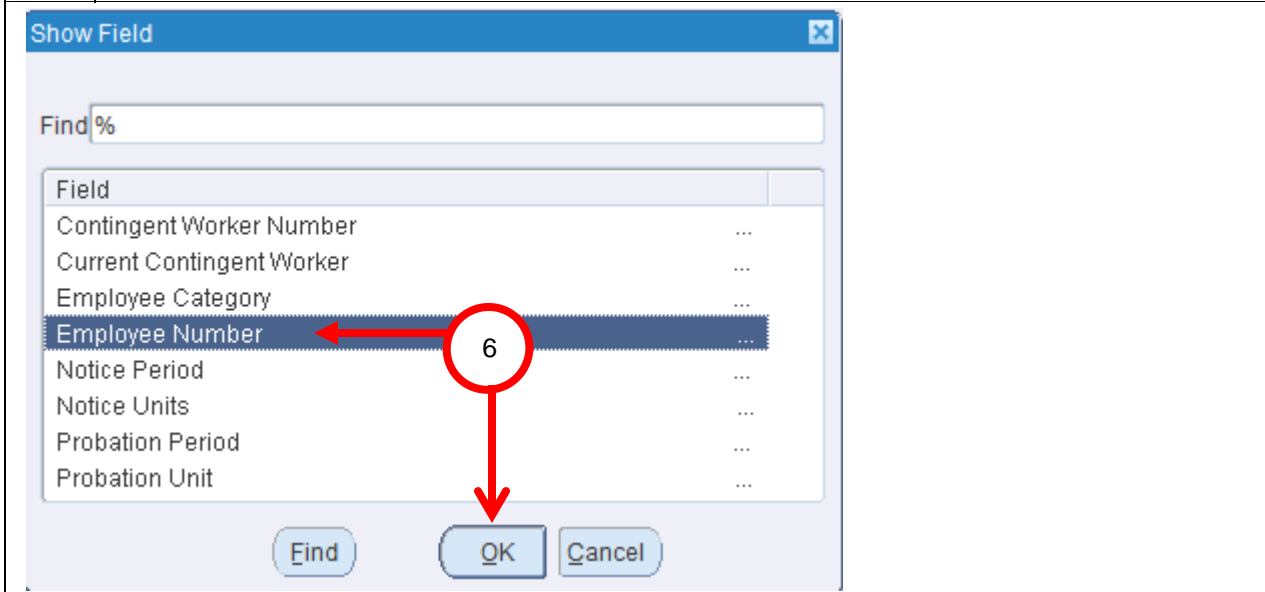
6.	**Select Column**: Select **Employee Number** and click the **Ok** button to add the **Employee Number** column to the form. **Note**: The added column will default to the right of the selected column.

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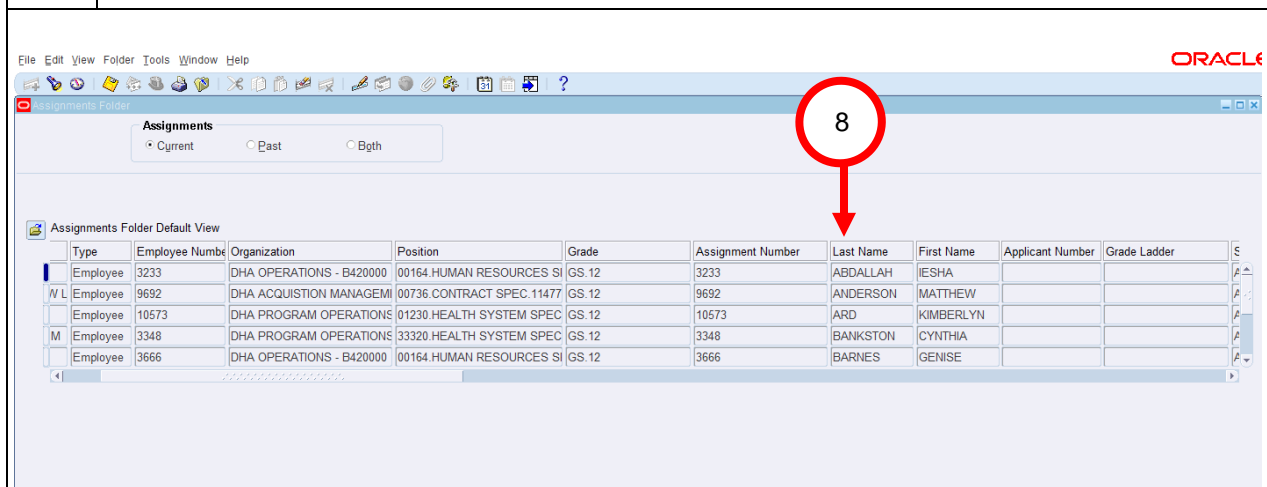
8.	View the form, the **Title** column has been removed. To remove additional fields, repeat **Step 7** for each column to be hidden.

Change Field Prompts
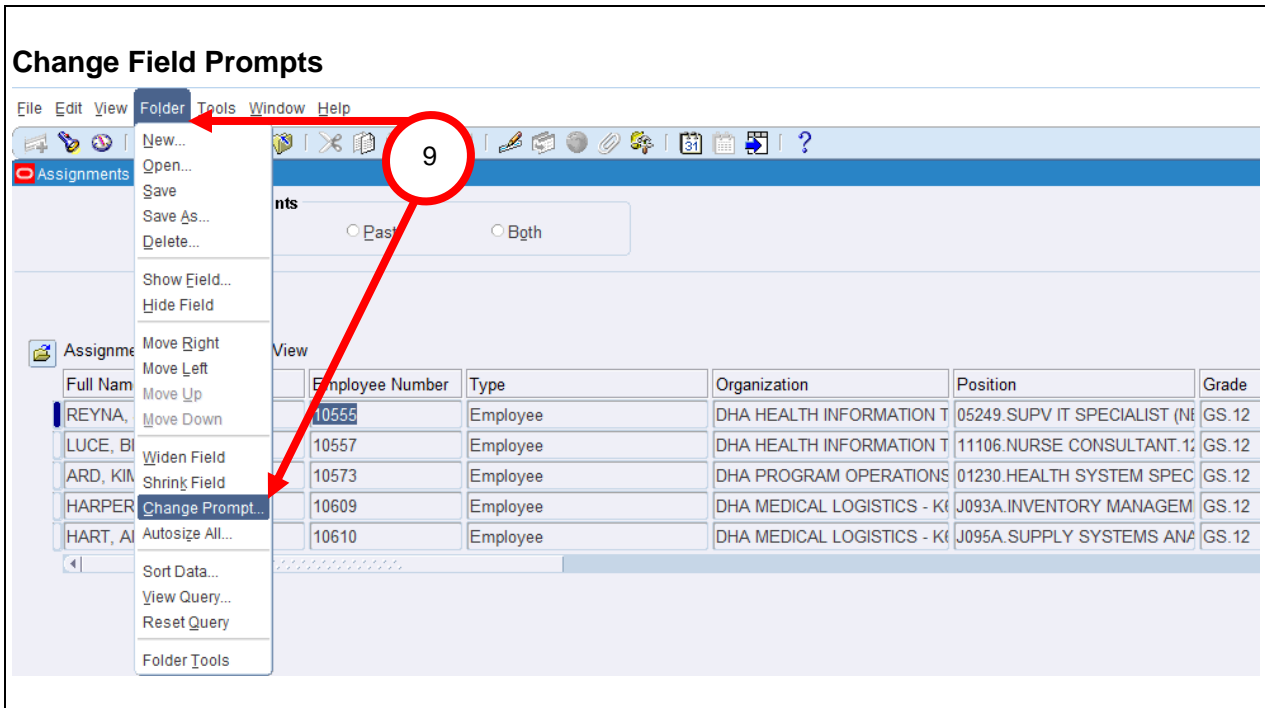
9.	**Change Column Name:** Select in the column heading **Employee Number**. • Click **Folder** in the Menu bar and scroll to select **Change Prompt** **Note:** An additional option is to right click on the column heading to display the Change Prompt box.
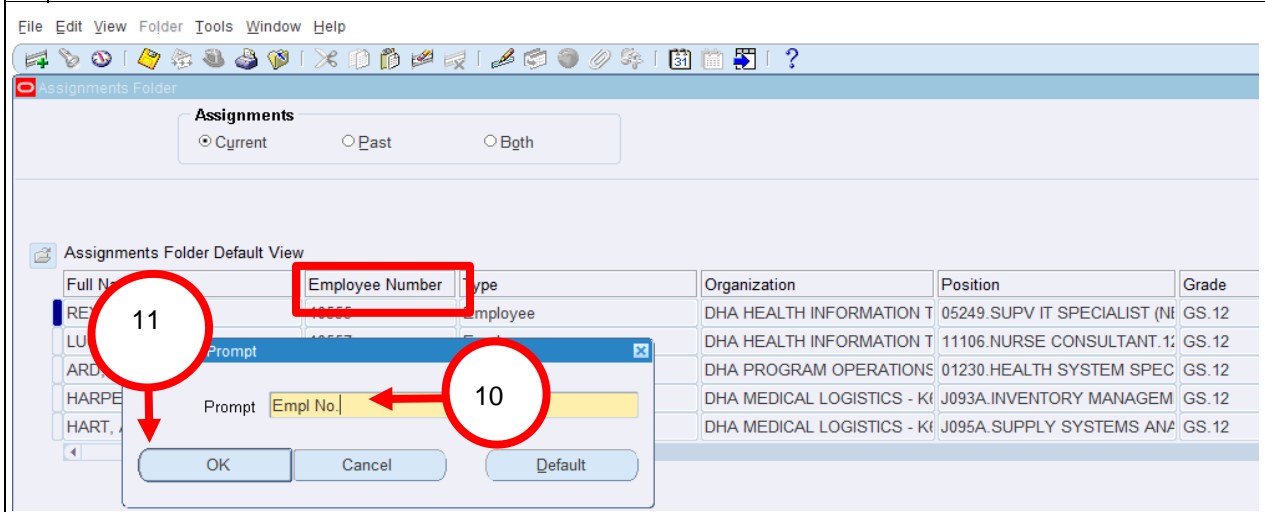
10.	**Enter New Name:** Enter **Empl No**. in the **Prompt** field. **Note**: If any form is being exported to Excel <u>and</u> merged together with other exported forms, it is recommended NOT to move, hide, rename or delete column headings.
11.	Click the **OK** button to change the column heading.

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.

Full Name	Empl No.	Type	Organization		Position	Grade
ABDALLAH, IESHA R	3233	Employee	DHA OPERATIONS - B420000		00164.HUMAN RESOURCES SF	GS.12
ANDERSON, MATTHEW L.	9692	Employee	DHA ACQUISTION MANAGEMENT OFFICE - B - K232000		00736.CONTRACT SPEC.11477	GS.12
ARD, KIMBERLYN N.	10573	Employee	DHA PROGRAM OPERATIONS - N384000		01230.HEALTH SYSTEM SPEC.	GS.12
BANKSTON, CYNTHIA M	3348	Employee	DHA PROGRAM OPERATIONS - N364000		33320.HEALTH SYSTEM SPEC.	GS.12
BARNES, GENISE M	3666	Employee	DHA OPERATIONS - B420000		00164.HUMAN RESOURCES SF	GS.12

| 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.

Full Name	Empl No.	Type	Organization	Position	Grade
ABDALLAH, IESHA R	3233	Employee	DHA OPERATIONS - B420000	00164.HUMAN RESOURCES SF	GS.12
ANDERSON, MATTHEW L.	9692	Employee	DHA ACQUISTION MANAGEMENT OFFICE - B - K232000	00736.CONTRACT SPEC.11477	GS.12
ARD, KIMBERLYN N.	10573	Employee	DHA PROGRAM OPERATIONS - N384000	01230.HEALTH SYSTEM SPEC.	GS.12
BANKSTON, CYNTHIA M	3348	Employee	DHA PROGRAM OPERATIONS - N364000	33320.HEALTH SYSTEM SPEC.	GS.12
BARNES, GENISE M	3666	Employee	DHA OPERATIONS - B420000	00164.HUMAN RESOURCES SF	GS.12

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.
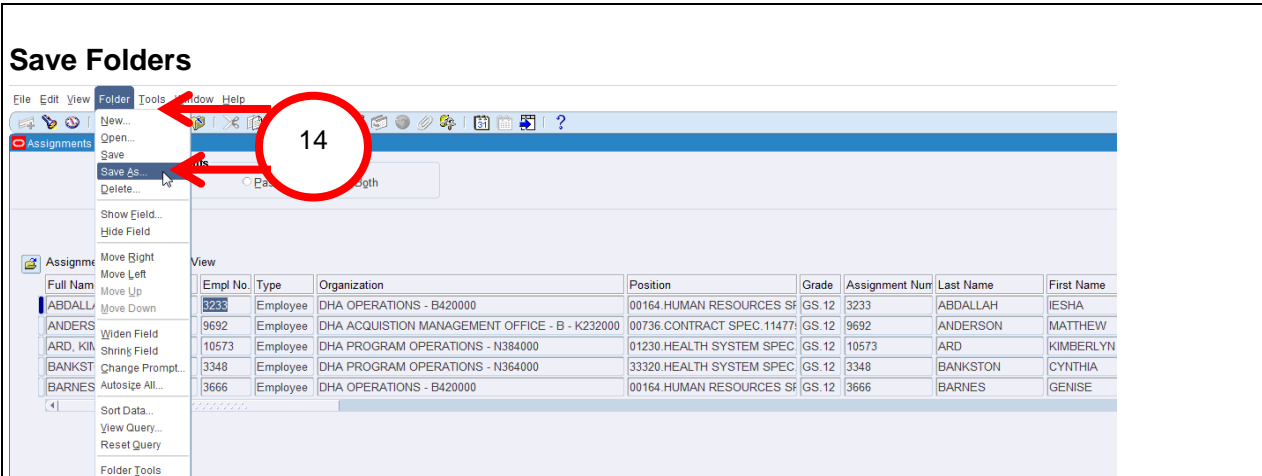
Save Folders

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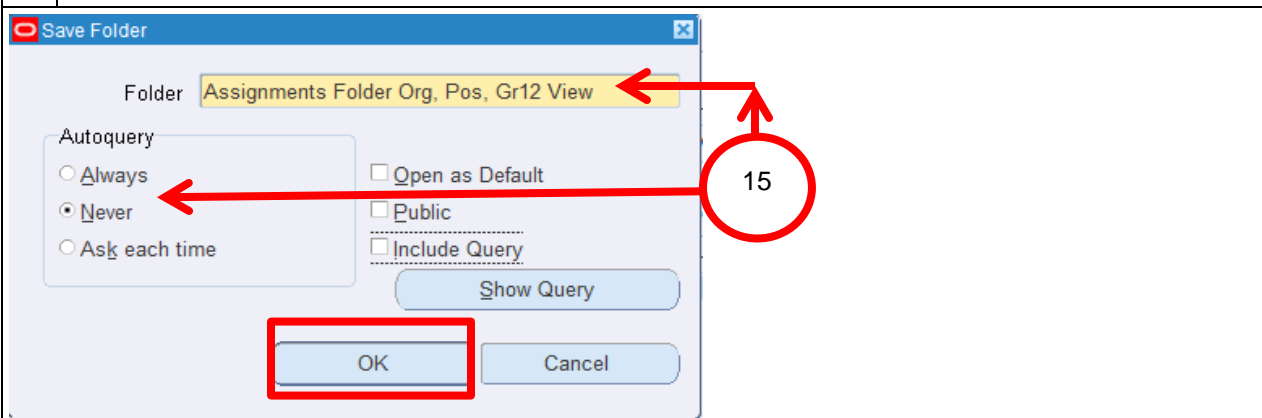
| 15.	• Select in the **Folder** field and enter **Assignment Folder Org, Pos, Gr12 View** title naming the customized view. • Click the radio button for **Never** • Click the **OK** button

Autoquery features:

Options	Description
Always	Includes the query used in creating the current data display
Never	Does not include the query with the folder display
Ask each Time	Prompted upon opening the folder to run the query

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:

| Options	Description
Open as Default	Set to display when the Assignment Folder form is opened
Public	Make this custom view available to all
Include Query	Executes the query when displaying this view
Show Query button	Folder Query box displays the query statement
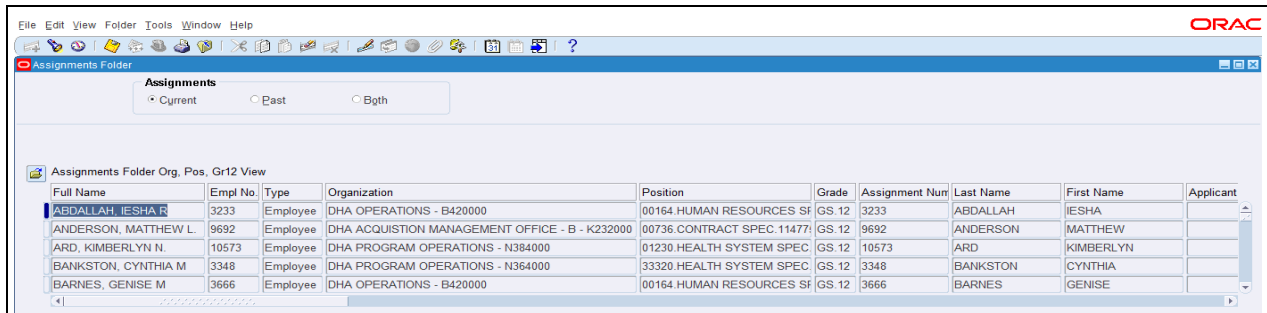
The new **Folder View** displays and is save for future use.

Open a Newly Created Folder
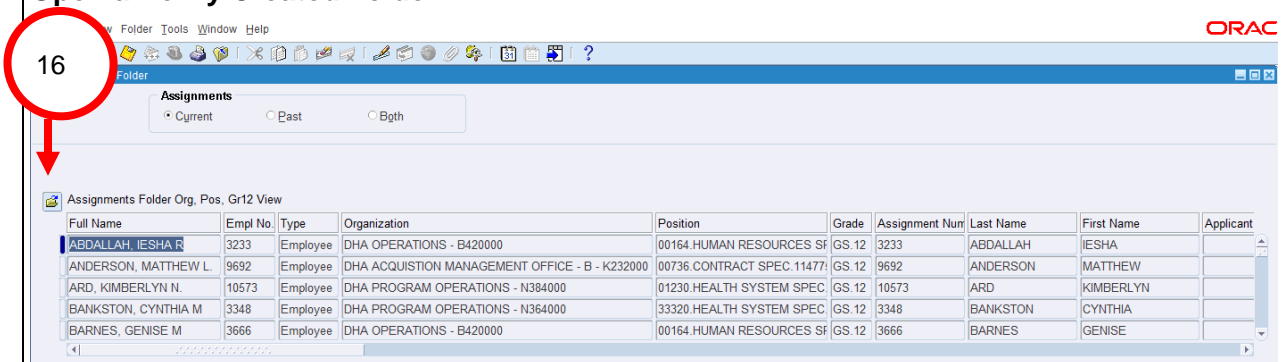
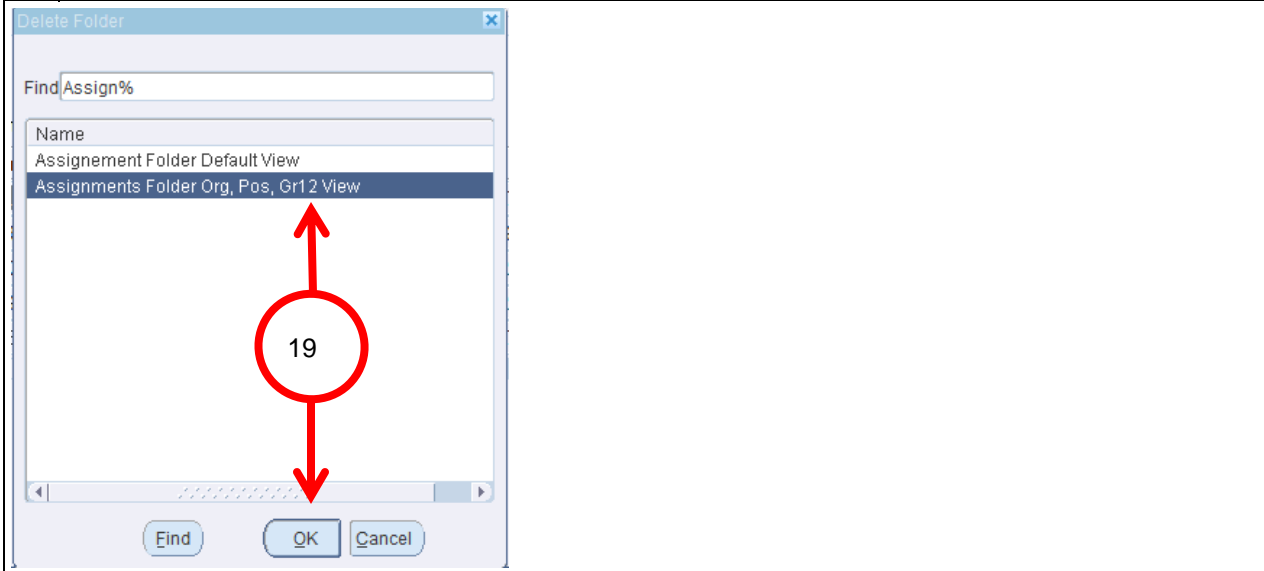To open previously saved folder view using the folder icon.

16	Click on the **Open folder…** icon to display a list of saved folders views
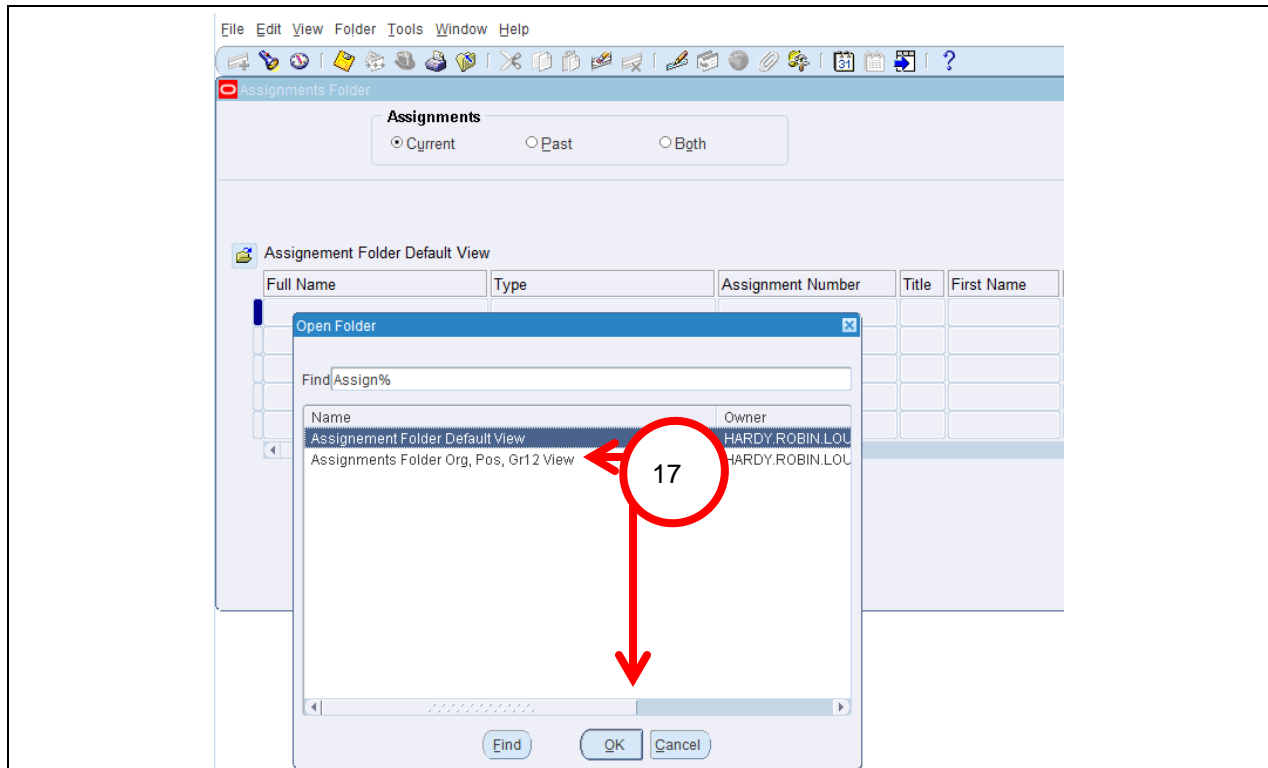
17.	• Select a folder name from the list or use the Find search feature • Click the **OK** button to display the selected view. **Note**: The folder name appears next to the folder icon, indicating the folder currently being viewed.

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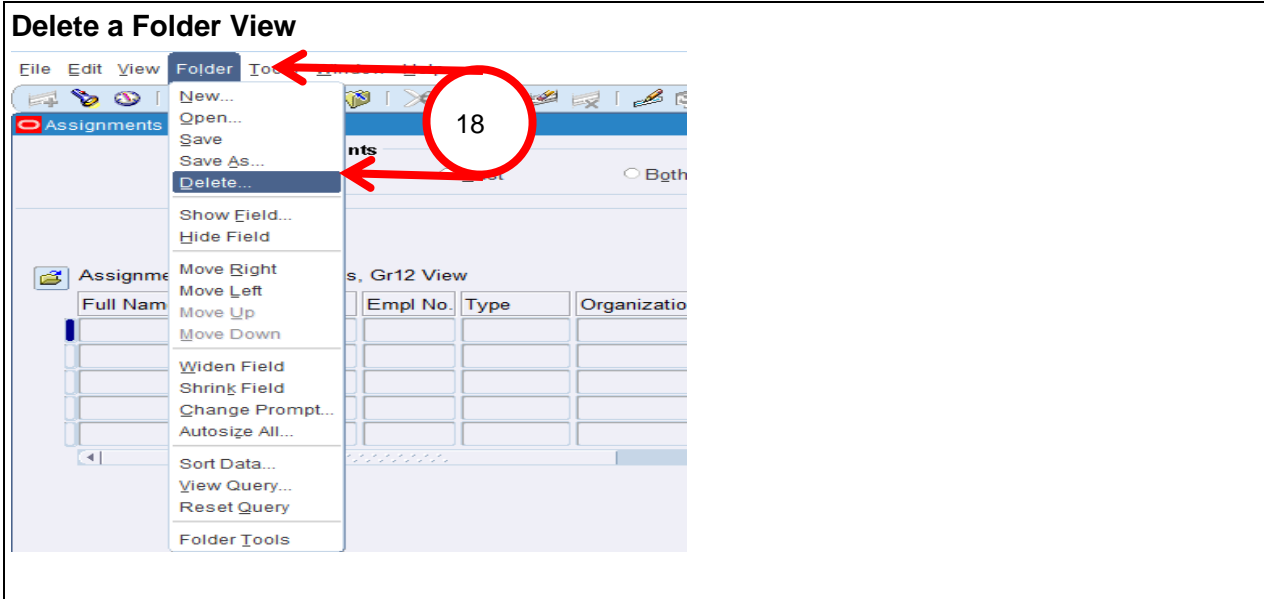
| 18. | Click on Folder in the Menu bar and scroll to select Delete. The **Delete Folder** box displays. |

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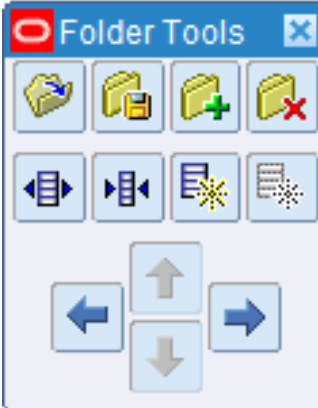
Open…	Opens the **Open Folder** box to display or Find the previously saved folder views
Save	Allows a **Save** option for a folder view that has been adjusted to a personalized view
New…	Opens the **Save Folder** box in order to complete a personalize folder view
Delete…	Opens the **Delete Folder**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