

NEW WORLD ERP USER-DEFINED FIELDS (UDF) MASS UPDATE ADD-IN

The new world ERP UDF Mass Update Add-In gives you a new way of entering new world ERP Human Resources data using Microsoft® Excel. With the add-in installed, you may retrieve and update user-defined values from within Microsoft Excel. A connection to new world ERP is only required when retrieving and updating values.

NOTE:

User departmental security will not be applied with this add-in; consequently, users will be able to view and update all employee UDFs in all departments.

Technical Specifications

The following Microsoft tools are prerequisites to use this add-in:

- Office 2010, Office 2013 or Office 2016
- Office 2010, Office 2013 or Office 2016 Primary Interop Assemblies
- Microsoft Office 365
- .NET Framework 4.0
- Visual Studio 2010 Tools for Office Runtime
- Windows Installer 3.1

NOTE:

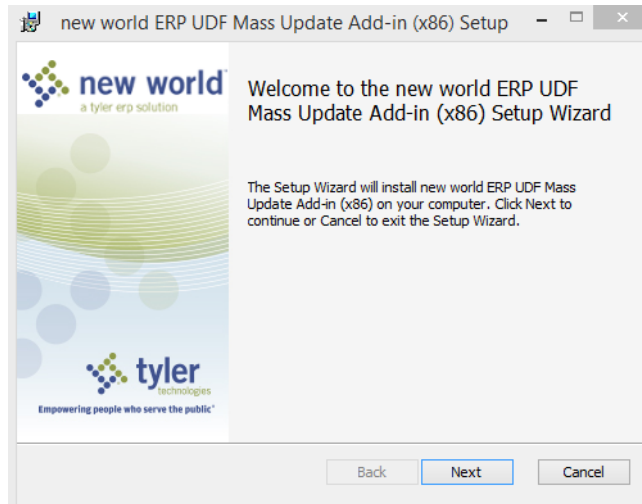
Please note that these prerequisites are not bundled with our software. If Office 2010 (32-bit version) is installed, use UdfMassExcelAddIn_x86.msi. If Office 2010 (64-bit version) is installed, use UdfMassExcelAddIn_x64.msi.

Install

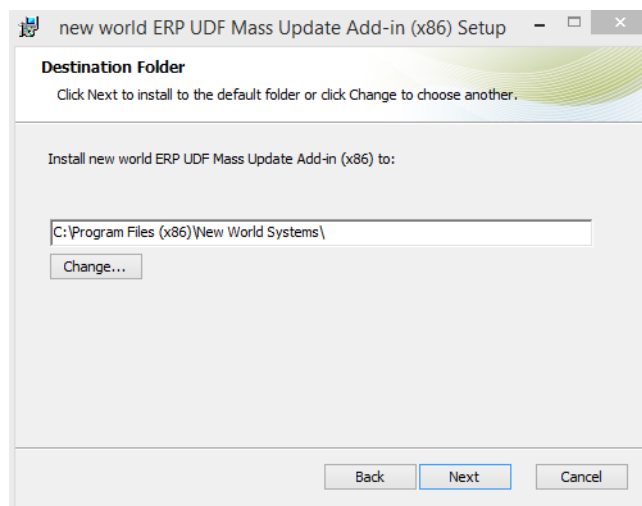
The new world ERP UDF Mass Update Add-In must be installed on each machine where a user wants to use Excel to retrieve and update UDF data from ERP.

To install the add-in, follow the steps below:

- 1 Run the *setup.exe* file to install the new world ERP UDF Mass Update Add-In Setup Wizard. The following dialog will open:

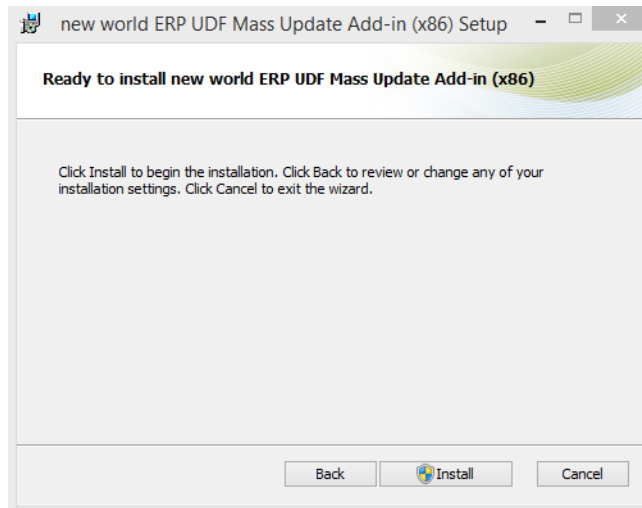


- 2 Click **Next**. The Destination Folder dialog will open:

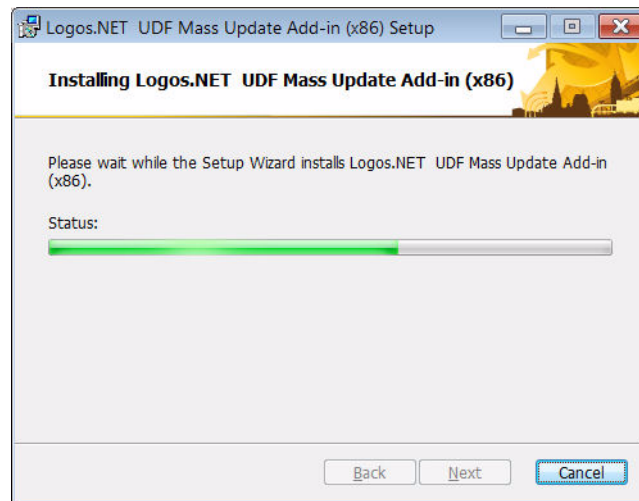


- 3 The field provided is populated with a default location for the installation of the add-in. If you want to change the location, type the path of a folder or click **Browse** to navigate to the folder where you want to install the Add-In.

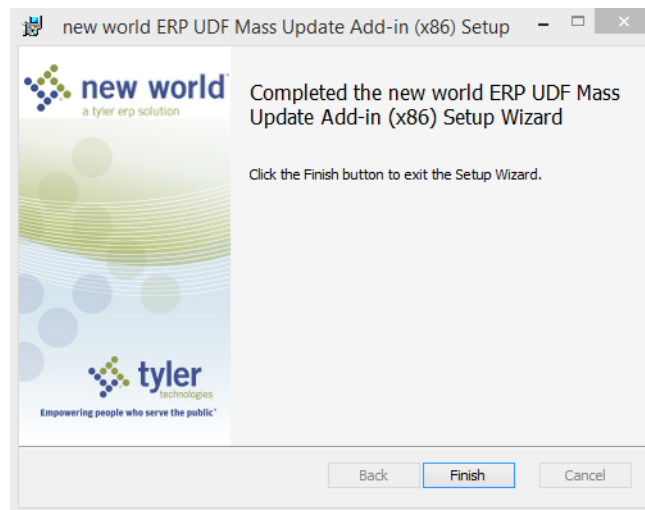
- 4 Click **Next**. The Ready-to-install dialog will open:



- 5 Click **Install** to start the installation. During the installation, the following popup will display:



When the installation completes, the following dialog will open:

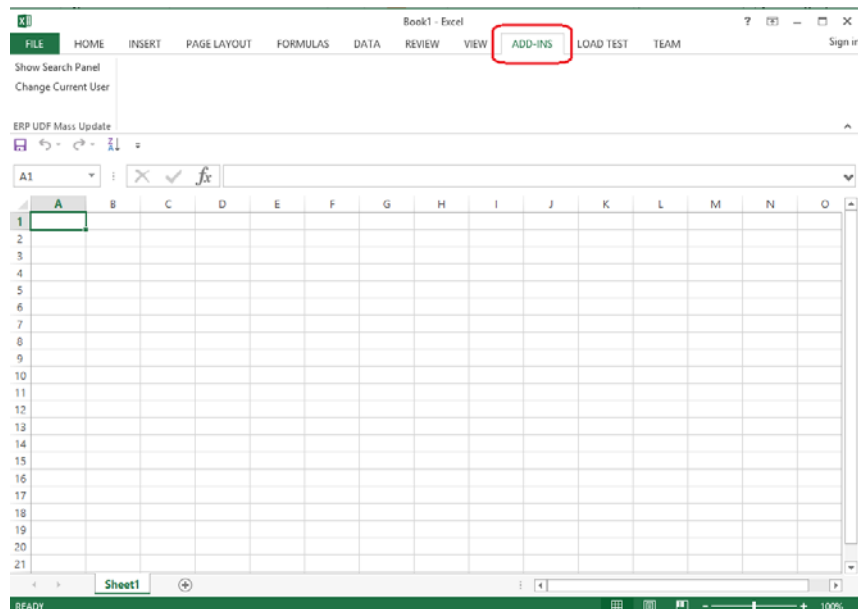


- 6 Click **Finish** to exit the Setup Wizard.

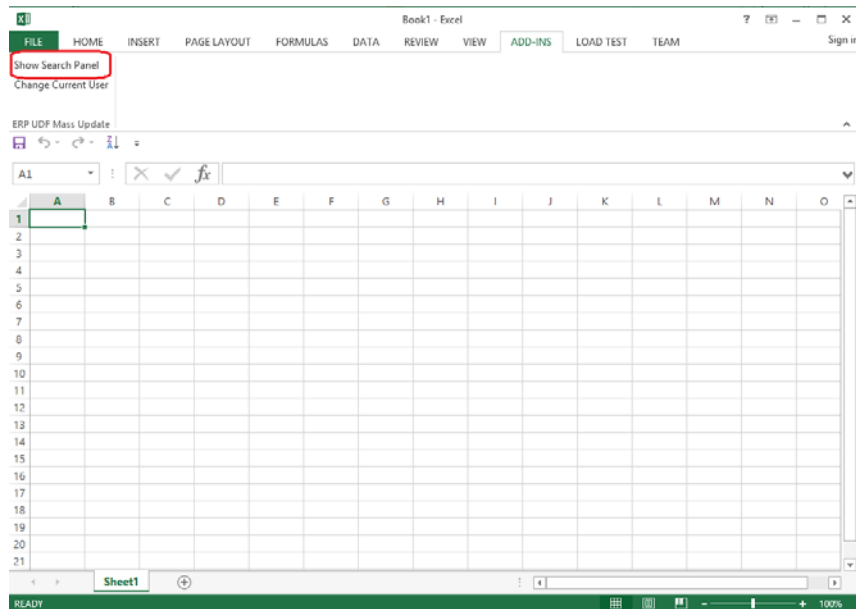
Load the Add-In

After the add-in has been installed on each client machine for users who will use this feature, it is ready for use.

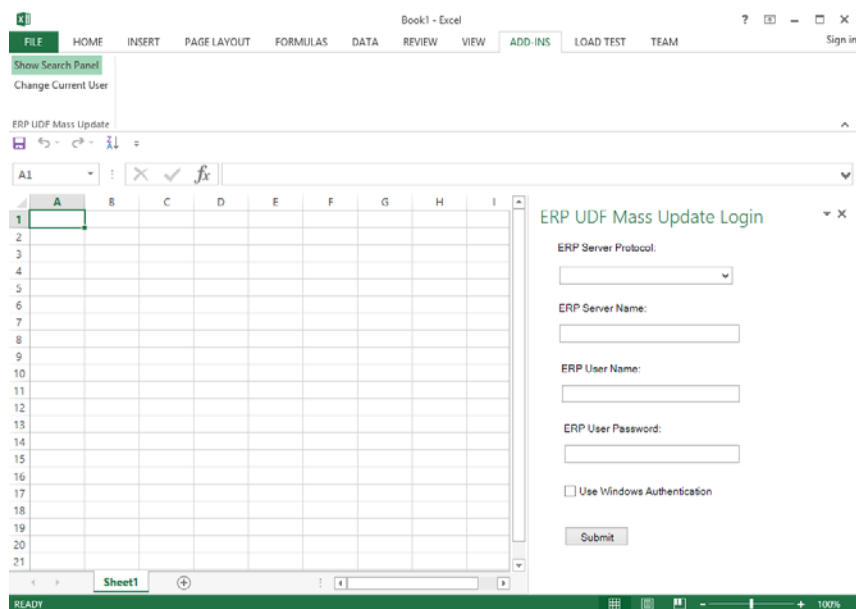
- 1 Open Excel.
- 2 Click the **Add-Ins** tab on the menu bar at the top of the worksheet:



- 3 Click *Show Search Panel* in the top-left corner of the worksheet:

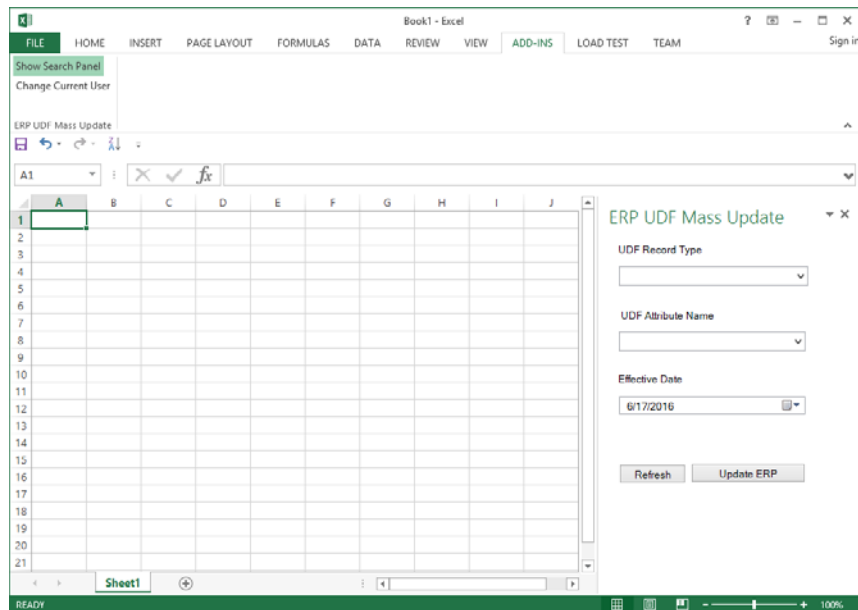


The ERP UDF Mass Update Login panel will display on the right side of the worksheet:



- 4 In the *ERP Server Name* field, type the URL address/name of your server where Logos.NET is installed.
- 5 In the *ERP User Name* and *Password* fields, type the user name and password you use to log into Logos.
- 6 If *Windows Authentication* is used by your organization to log into new world ERP, check the *Use Windows Authentication* box.

- 7 Click **Submit**. The Excel worksheet will re-display with the ERP UDF Mass Update panel on the right:



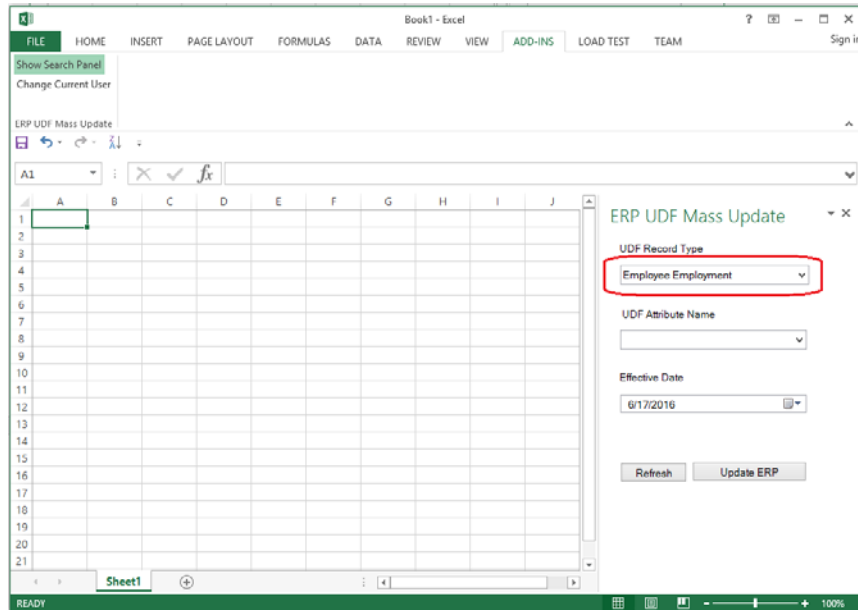
UDF Update Example

With the new world ERP UDF Mass Update Add-In, you have the ability to update the following types of user-defined fields:

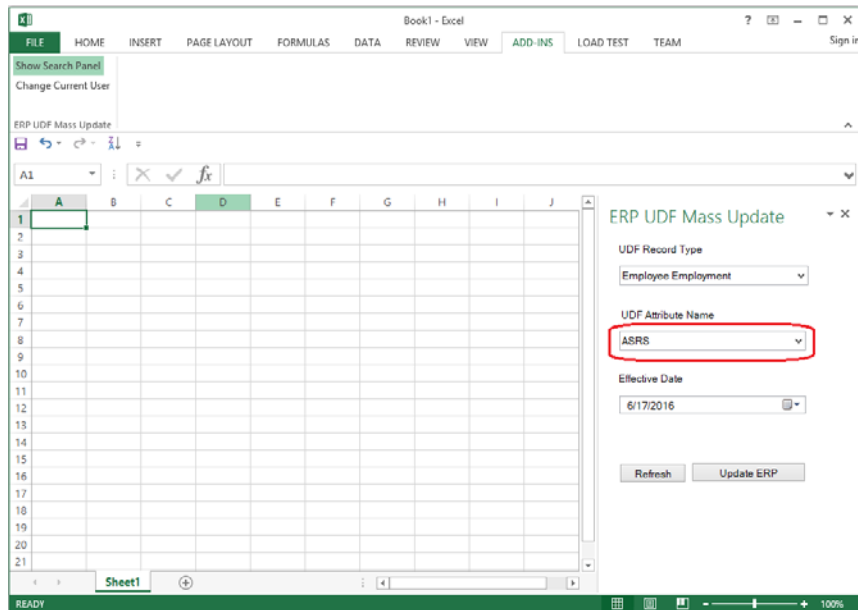
- *Check box*
- *Date*
- *Monetary*
- *Quantity*
- *Text*
- *Validation Set*

The following steps provide a basic example of how to use the add-in to update a user-defined *Date* field on the **Employment** tab in Workforce Administration:

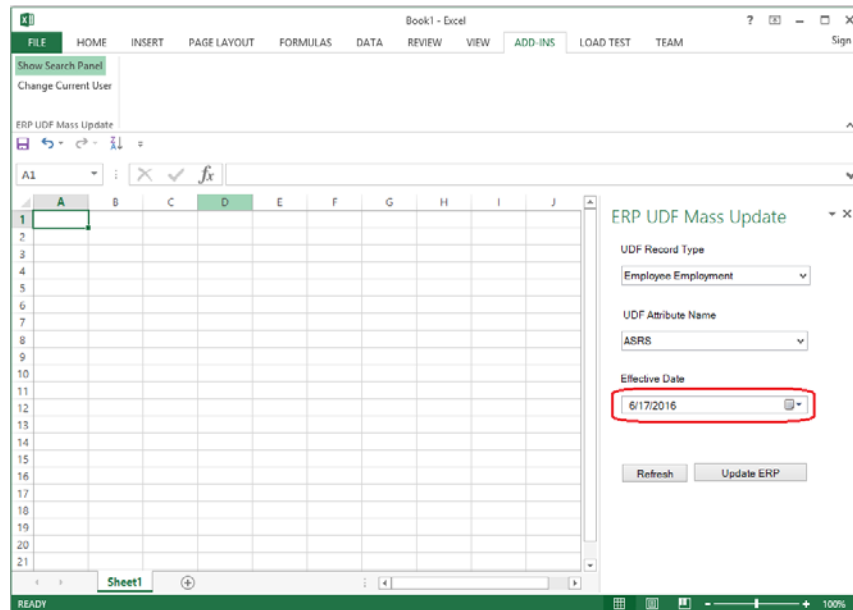
- 1 In the *UDF Record Type* field, select **Employee Employment**:



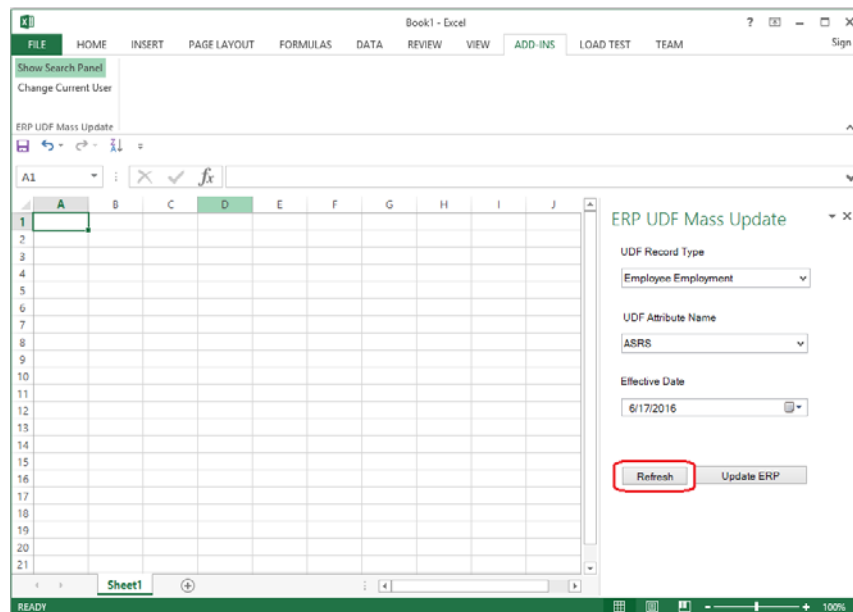
- 2 Select a *UDF Attribute Name*. In this example, **ASRS** has been selected:



- 3 Select an *Effective Date*. Employee employment records as of this date will be retrieved. Today's date is the default selection:



- 4 Click the **Refresh** button:



The Excel worksheet will populate with the new world ERP data pertinent to the selections you have made in the ERP UDF Mass Update panel:

Employee Number	Employee Name	Benefit Group	Department	Job Title	Employment Status	UDF Current Value	UDF New Value
3674	Testersonski, DeTestashunda Mongom	A Shift Fire Officers	Finance - Treasury	Test Active	Active		
7 202	Art, Darion	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive	p	p
8 230	Aumiller, Deion G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
9 2043	Beckard, Grace L	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
10 2959	Billis, Hailee A	A Shift Fire Officers	Fire - Suppression	22.111 - Firefighter / EMT	Active		
11 2807	Bonella, Alia V	A Shift Fire Officers	Fire - Suppression	22.103 - Firefighter / EMT II	Active		
12 1049	Bounds, Landen L	A Shift Fire Officers	Fire - Suppression	22.084 - Company Commander / EMT	Active		
13 2480	Boze, Ramon R	A Shift Fire Officers	Fire - Suppression	22.036 - Fire Apparatus Operator / EMT	Active		
14 185	Burkart, Cristobal B	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Active		
15 2808	Casperia, Amani T	A Shift Fire Officers	Fire - Suppression	22.082 - Fire Apparatus Operator / EMT	Active	2	2
16 263	Carlson, Melina C	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		
17 1224	Cayer, Deion T	A Shift Fire Officers	Fire - Suppression	22.023 - Company Commander / EMT	Inactive		
18 348	Cerny, Doreen L	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		
19 212	Oynow, Deion R	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		
20 240	Daking, Hassan L	A Shift Fire Officers	Fire - Suppression	22.055 - Fire Apparatus Operator / EMT	Inactive		
21 1899	Davis, Bryana R	A Shift Fire Officers	Fire - Suppression	22.055 - Fire Apparatus Operator / EMT	Active		
22 205	Dembowski, Christy D	A Shift Fire Officers	Fire - Suppression	22.124 - Company Commander / EMT	Active		
23 218	Donino, Dane W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
24 2127	Doulan, Bailey T	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
25 2809	Drager, Lloyd Test	A Shift Fire Officers	Fire - Suppression	22.104 - Firefighter / EMT II	Active		
26 2107	Enhard, Carmen J	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
27 757	Eric, Curtis R	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
28 399	Figurski, Kander G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
29 2208	Filburn, Seamus P	A Shift Fire Officers	Fire - Suppression	22.052 - Fire Apparatus Operator / EMT	Inactive		
30 262	Fishburn, Elliot D	A Shift Fire Officers	Fire - Suppression	22.047 - Fire Apparatus Operator / EMT	Active		
31 242	Follard, Donna R	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
32 247	Galipeau, Patricia W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		
33 208	Gibson, Jonathan C	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		

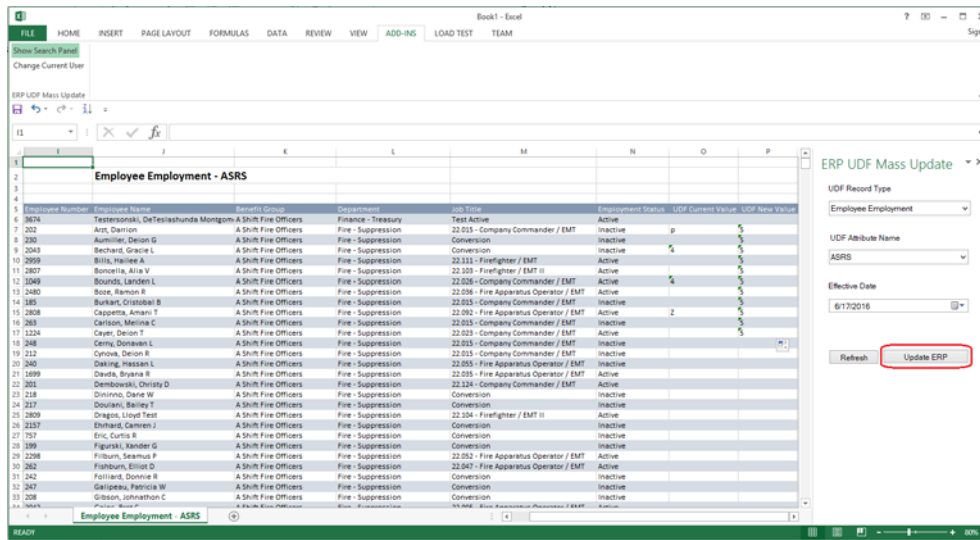
5 The example worksheet shown above contains columns for *Employee Number*, *Employee Name*, *Benefit Group*, *Department*, *Job Title*, *Employment Status*, *UDF Current Value* and *UDF New Value*.

In the appropriate cells of the *UDF New Value* column, type the values that are to replace the values in the *UDF Current Value* column. You may use Excel formulas to set the new value.

In the example shown below, the current UDF value is being replaced by 5:

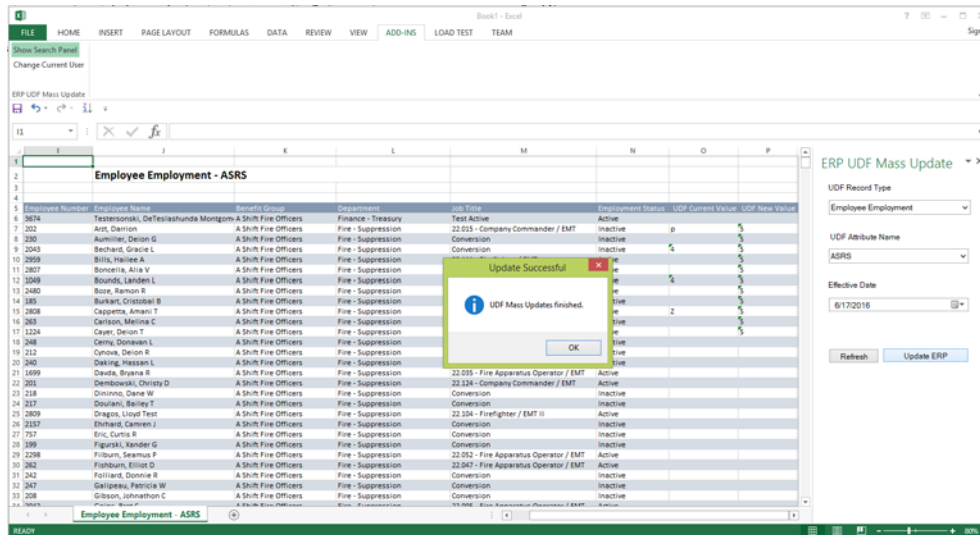
Employee Number	Employee Name	Benefit Group	Department	Job Title	Employment Status	UDF Current Value	UDF New Value
3674	Testersonski, DeTestashunda Mongom	A Shift Fire Officers	Finance - Treasury	Test Active	Active		
7 202	Art, Darion	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive	p	5
8 230	Aumiller, Deion G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
9 2043	Beckard, Grace L	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
10 2959	Billis, Hailee A	A Shift Fire Officers	Fire - Suppression	22.111 - Firefighter / EMT	Active		5
11 2807	Bonella, Alia V	A Shift Fire Officers	Fire - Suppression	22.103 - Firefighter / EMT II	Active		5
12 1049	Bounds, Landen L	A Shift Fire Officers	Fire - Suppression	22.084 - Company Commander / EMT	Active		5
13 2480	Boze, Ramon R	A Shift Fire Officers	Fire - Suppression	22.036 - Fire Apparatus Operator / EMT	Active		5
14 185	Burkart, Cristobal B	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Active		5
15 2808	Casperia, Amani T	A Shift Fire Officers	Fire - Suppression	22.082 - Fire Apparatus Operator / EMT	Active	2	5
16 263	Carlson, Melina C	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		5
17 1224	Cayer, Deion T	A Shift Fire Officers	Fire - Suppression	22.023 - Company Commander / EMT	Inactive		5
18 348	Cerny, Doreen L	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		5
19 212	Oynow, Deion R	A Shift Fire Officers	Fire - Suppression	22.053 - Company Commander / EMT	Inactive		5
20 240	Daking, Hassan L	A Shift Fire Officers	Fire - Suppression	22.055 - Fire Apparatus Operator / EMT	Inactive		5
21 1899	Davis, Bryana R	A Shift Fire Officers	Fire - Suppression	22.055 - Fire Apparatus Operator / EMT	Active		5
22 205	Dembowski, Christy D	A Shift Fire Officers	Fire - Suppression	22.124 - Company Commander / EMT	Active		5
23 218	Donino, Dane W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
24 2127	Doulan, Bailey T	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
25 2809	Drager, Lloyd Test	A Shift Fire Officers	Fire - Suppression	22.104 - Firefighter / EMT II	Active		5
26 2107	Enhard, Carmen J	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
27 757	Eric, Curtis R	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
28 399	Figurski, Kander G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
29 2208	Filburn, Seamus P	A Shift Fire Officers	Fire - Suppression	22.052 - Fire Apparatus Operator / EMT	Inactive		5
30 262	Fishburn, Elliot D	A Shift Fire Officers	Fire - Suppression	22.047 - Fire Apparatus Operator / EMT	Active		5
31 242	Follard, Donna R	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
32 247	Galipeau, Patricia W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5
33 208	Gibson, Jonathan C	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive		5

6 To update new world ERP after making your changes, click the **Update ERP** button:



The screenshot shows the 'ERP UDF Mass Update' dialog box. The 'UDF Record Type' is set to 'Employee Employment'. The 'UDF Attribute Name' is set to 'ASRS'. The 'Effective Date' is set to 6/17/2016. The 'Update ERP' button is highlighted with a red rectangle.

7 A popup will display, letting you know whether new world ERP has been updated successfully:



The screenshot shows the 'ERP UDF Mass Update' dialog box. An 'Update Successful' popup message is displayed over the data table, indicating that the UDF Mass Updates are finished. The 'Update ERP' button is now disabled.

Rows that contain errors will be highlighted in red, with corresponding error messages displayed immediately to the right of the far-right column of data.

8 Click **OK** to close the popup.

9 Click the **Refresh button to view the new data in Excel:**

Employee Number	Employee Name	Benefit Group	Department	Job Title	Employment Status	UDF Current Value	UDF New Value
3674	Testersonski, DeTesteshunda Montgomery	A Shift Fire Officers	Finance - Treasury	Test Active	Active		
202	Acit, Danton	A Shift Fire Officers	Fire - Suppression	22.015 - Company Commander / EMT	Inactive	\$	\$
290	Aumiller, Delon G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
2043	Rehward, Grace L	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
2059	Bills, Phyllis A	A Shift Fire Officers	Fire - Suppression	22.111 - Firefighter / EMT	Active	\$	\$
2807	Boncelia, Alia V	A Shift Fire Officers	Fire - Suppression	22.105 - Firefighter / EMT II	Active	\$	\$
3048	Bounds, Landen L	A Shift Fire Officers	Fire - Suppression	22.028 - Company Commander / EMT	Active	\$	\$
2480	Bone, Ramon B	A Shift Fire Officers	Fire - Suppression	22.096 - Fire Apparatus Operator / EMT	Active	\$	\$
385	Burkart, Cristobal B	A Shift Fire Officers	Fire - Suppression	22.015 - Company Commander / EMT	Inactive	\$	\$
2808	Cappetta, Aman T	A Shift Fire Officers	Fire - Suppression	22.092 - Fire Apparatus Operator / EMT	Active	\$	\$
3481	Carlson, Melissa C	A Shift Fire Officers	Fire - Suppression	22.015 - Company Commander / EMT	Inactive	\$	\$
1224	Cayer, Delon T	A Shift Fire Officers	Fire - Suppression	22.021 - Company Commander / EMT	Active	\$	\$
348	Cernu, Donawan L	A Shift Fire Officers	Fire - Suppression	22.015 - Company Commander / EMT	Inactive	\$	\$
212	Cynova, Delon B	A Shift Fire Officers	Fire - Suppression	22.015 - Company Commander / EMT	Inactive	\$	\$
340	Dakine, Hassan L	A Shift Fire Officers	Fire - Suppression	22.055 - Fire Apparatus Operator / EMT	Inactive	\$	\$
1899	Davis, Bryana B	A Shift Fire Officers	Fire - Suppression	22.015 - Fire Apparatus Operator / EMT	Active	\$	\$
201	Dembrowski, Christy D	A Shift Fire Officers	Fire - Suppression	22.124 - Company Commander / EMT	Active	\$	\$
218	Dimino, Dane W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
217	Dougan, Bailey T	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
2809	Dragos, Lloyd Test	A Shift Fire Officers	Fire - Suppression	22.104 - Firefighter / EMT II	Active	\$	\$
2137	Ehrhard, Carmen J	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
717	Eric, Curtis B	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
399	Figurski, Kander G	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
2298	Filburn, Seamus P	A Shift Fire Officers	Fire - Suppression	22.012 - Fire Apparatus Operator / EMT	Active	\$	\$
362	Fishburn, Elliot D	A Shift Fire Officers	Fire - Suppression	22.047 - Fire Apparatus Operator / EMT	Inactive	\$	\$
342	Fordard, Donnie B	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
347	Galipeau, Patricia W	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$
208	Gibson, Johnathon C	A Shift Fire Officers	Fire - Suppression	Conversion	Inactive	\$	\$

10 When you navigate to an applicable employee's **Employment tab in Workforce (Human Resources > Workforce Administration > Search > Employee > Employment), you should see the new value in the UDF.**

UDFs may be updated in both directions: from Excel to new world ERP, and vice versa. If you change UDF values in new world ERP, click the **Refresh** button in Excel to view the changes. If you do not click **Refresh** before trying to update new world ERP with another new value, you will receive an error message.

