

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

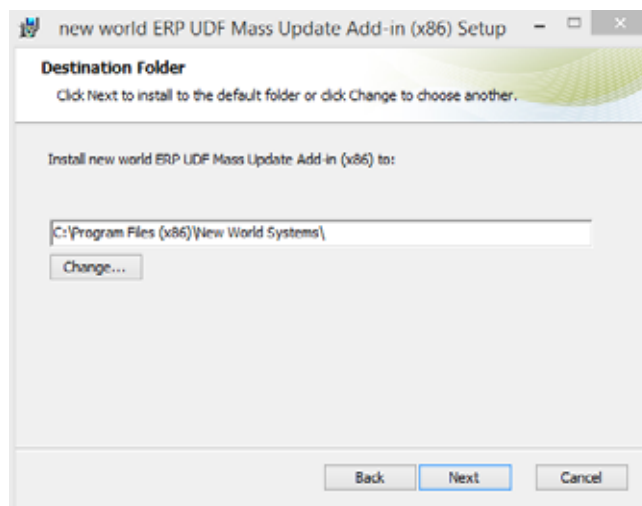
The New World ERP UDF Mass Update Add-In must be installed on each machine where a user wants to use Excel to retrieve and update UDF data from ERP.

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:

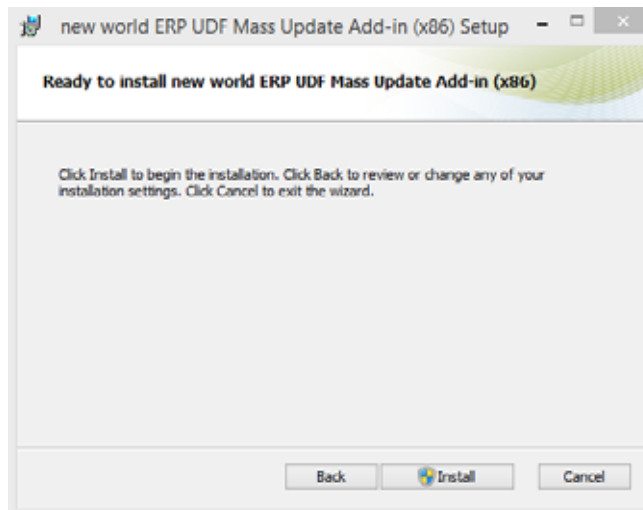


- 2 Click **Next**. The Destination Folder dialog will open:

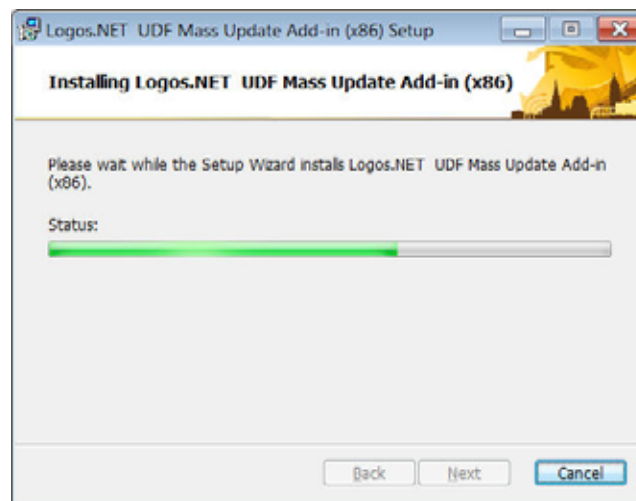


- 3 The field provided is populated with a default location for the installation of the add-in. If you want to change the location, type the path of a folder or click **Browse** to navigate to the folder where you want to install the Add-In.

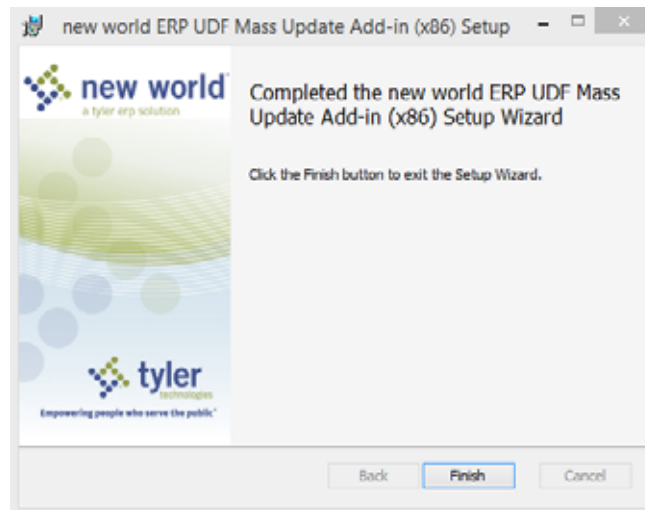
- 4 Click **Next**. The Ready-to-install dialog will open:



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



When the installation completes, the following dialog will open:

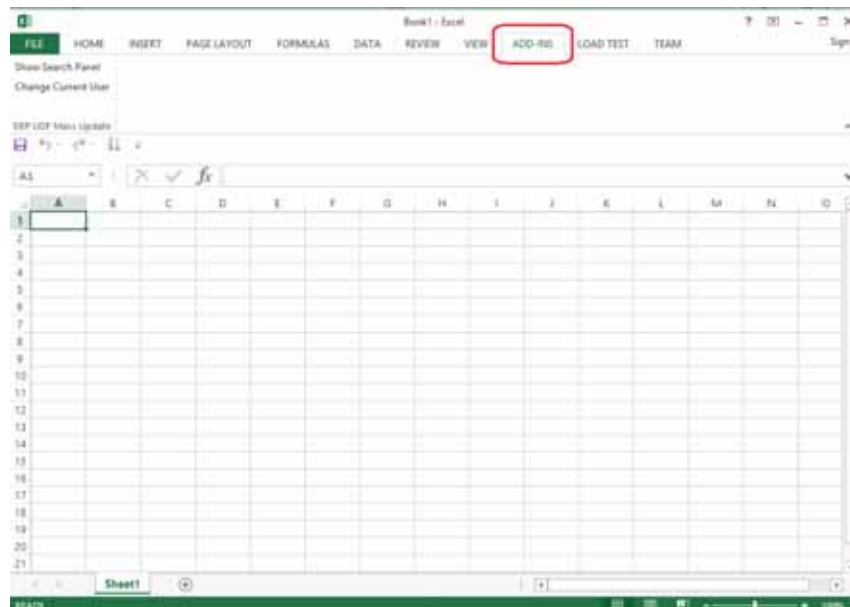


- 6 Click **Finish** to exit the Setup Wizard.

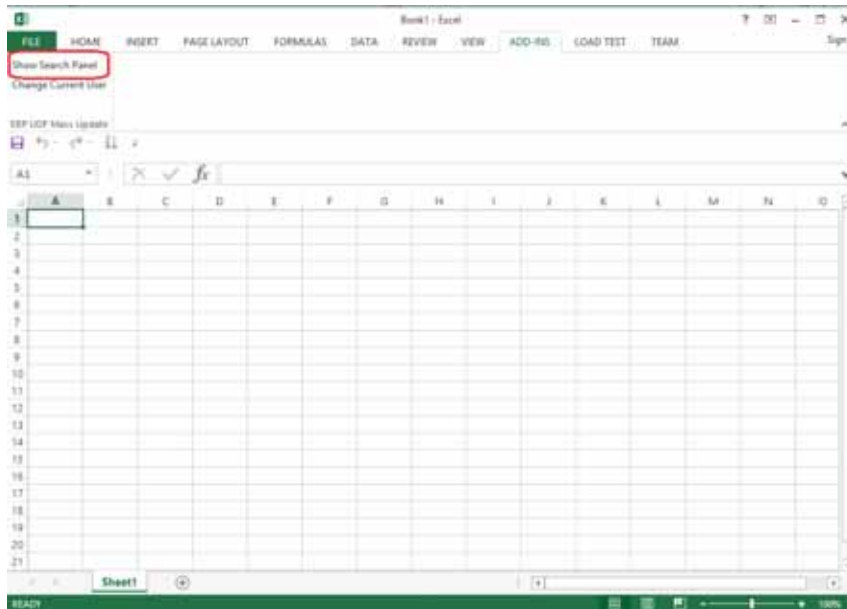
Load the Add-In

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

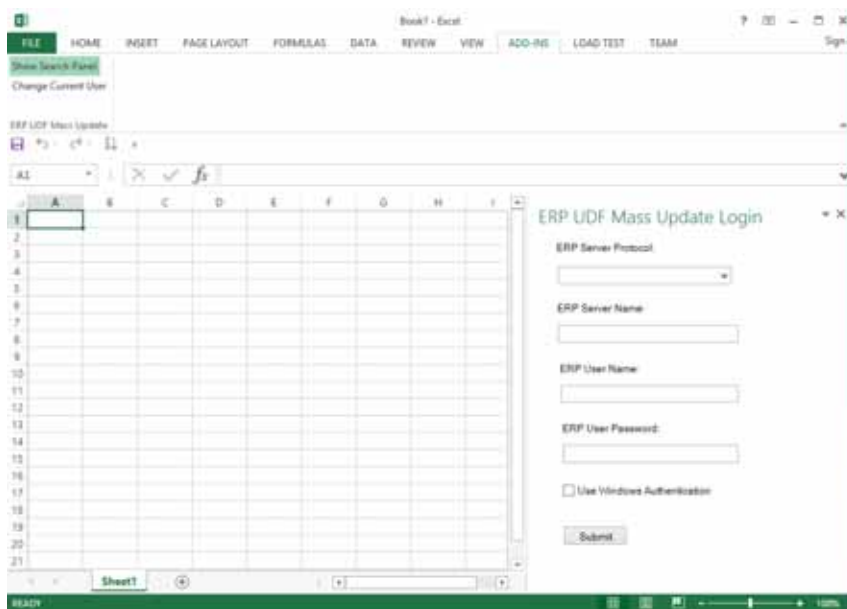
- 1 Open Excel.
- 2 Click the **Add-Ins** tab on the menu bar at the top of the worksheet:



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

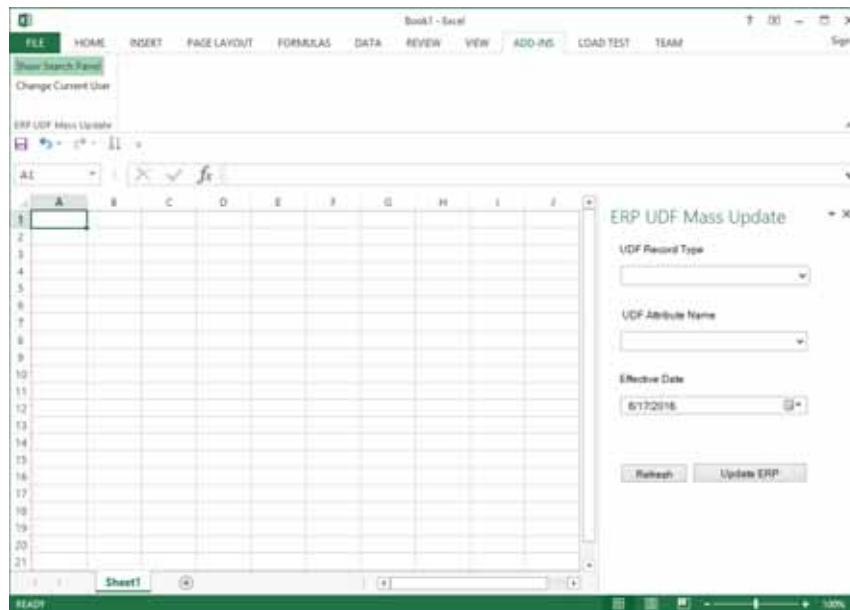


The ERP UDF Mass Update Login panel will display on the right side of the worksheet:



- 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:



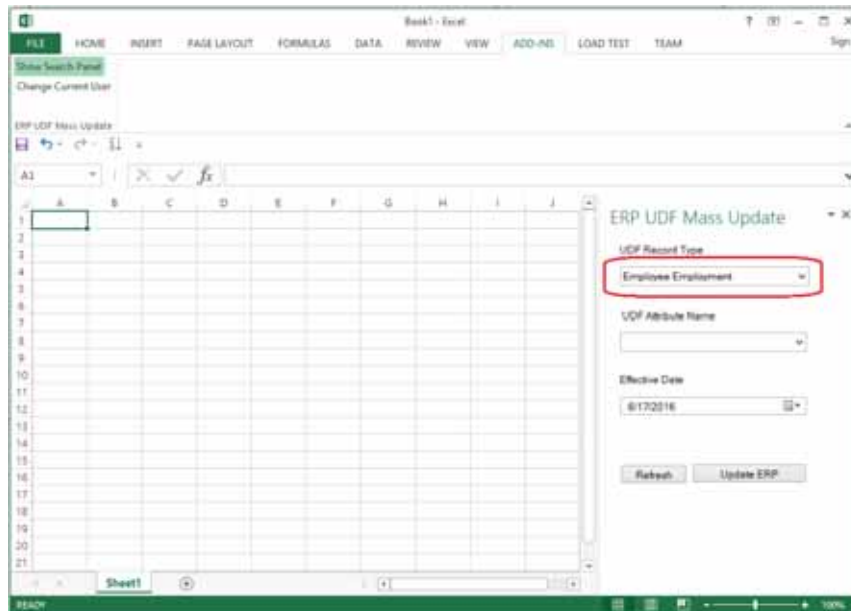
UDF Update Example

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

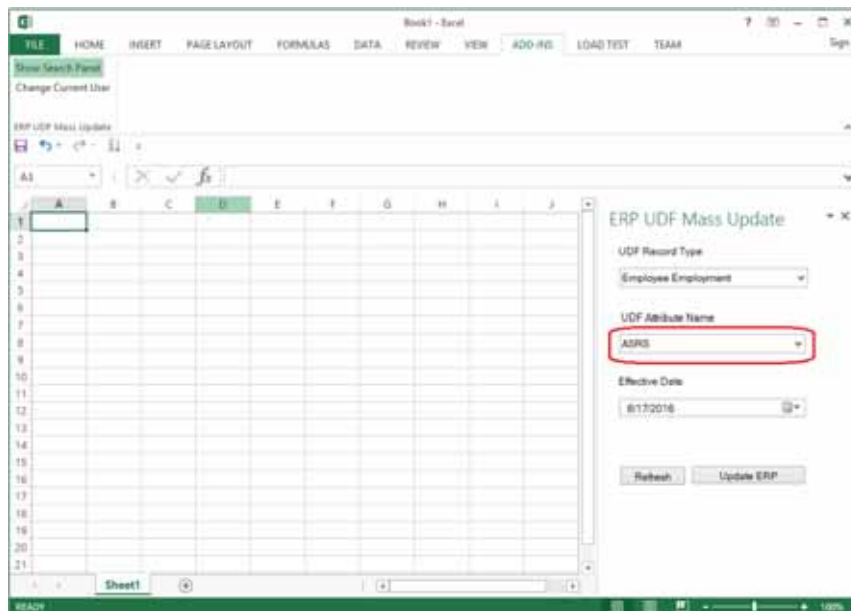
- *Check box*
- *Date*
- *Monetary*
- *Quantity*
- *Text*
- *Validation Set*

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:

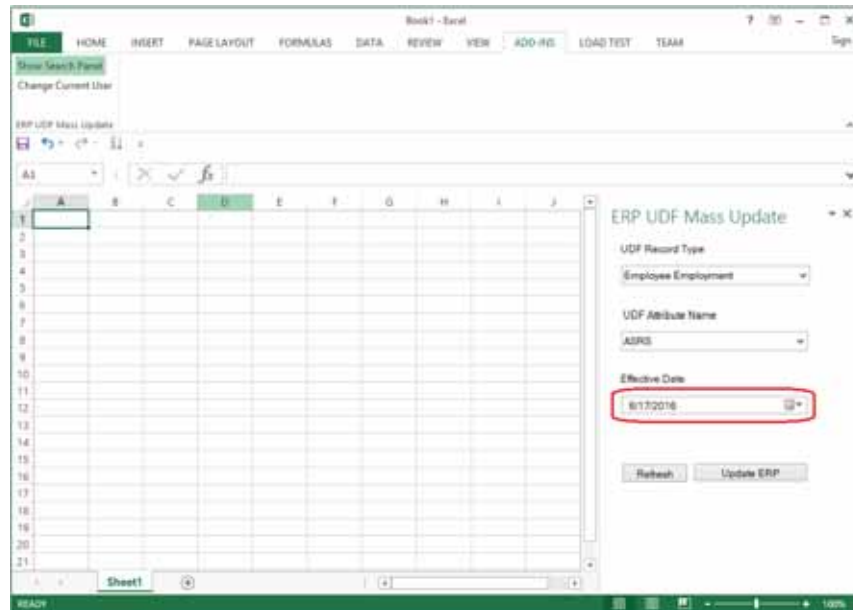
- 1 In the *UDF Record Type* field, select **Employee Employment**:



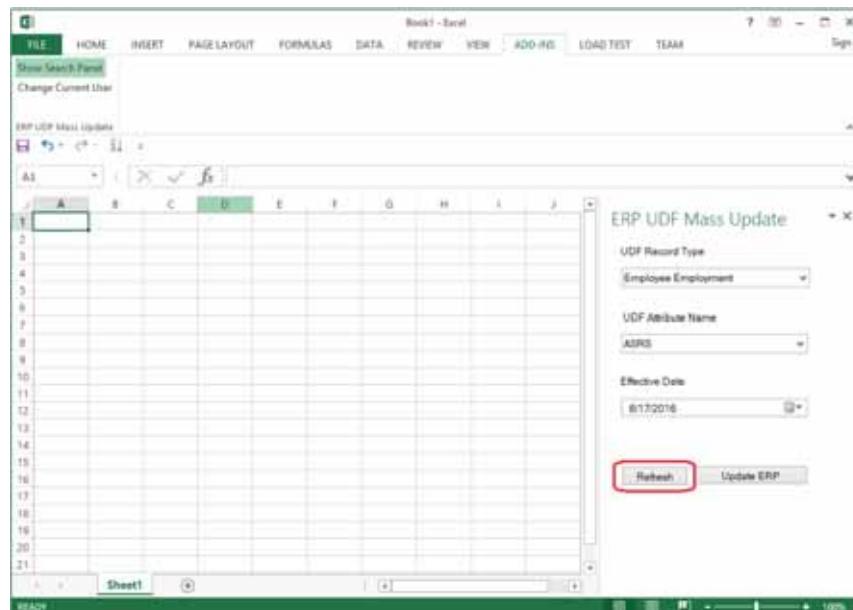
- 2 Select a *UDF Attribute Name*. In this example, **ASRS** has been selected:



- 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:



[illegible]

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

File

Home

Insert

Page Layout

References

Send

Review

View

Developer Tools

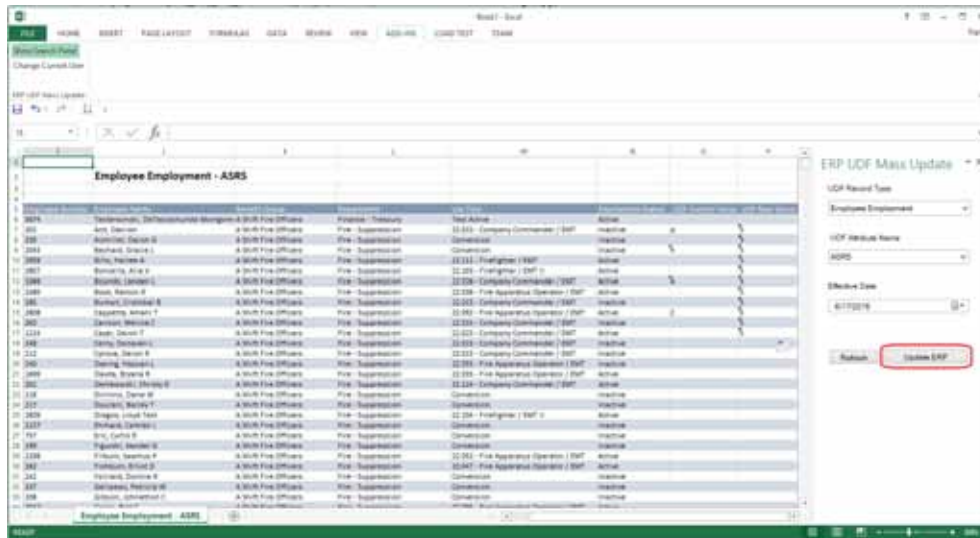
Help

Share Workbook

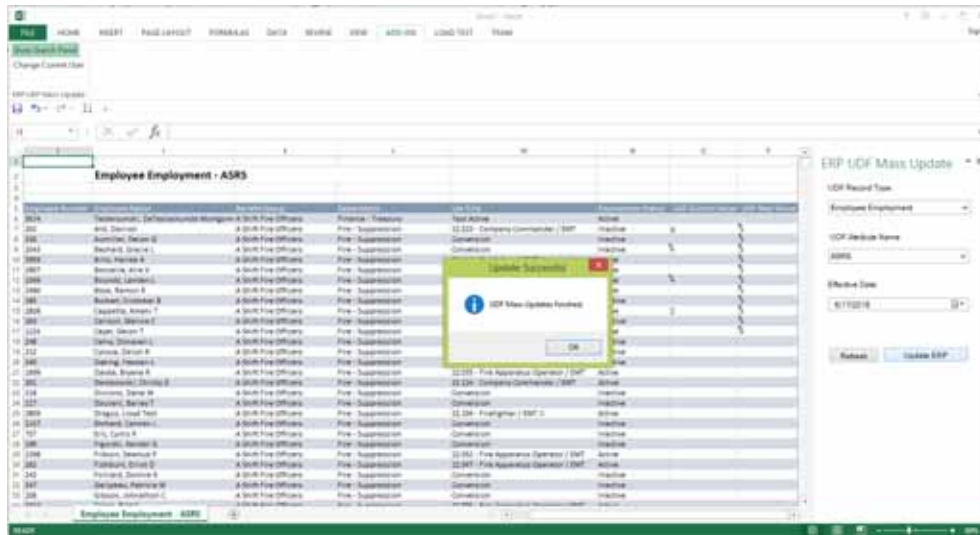
Change Colors

Get Outlook updates

6 To update New World ERP after making your changes, click the **Update ERP** button:



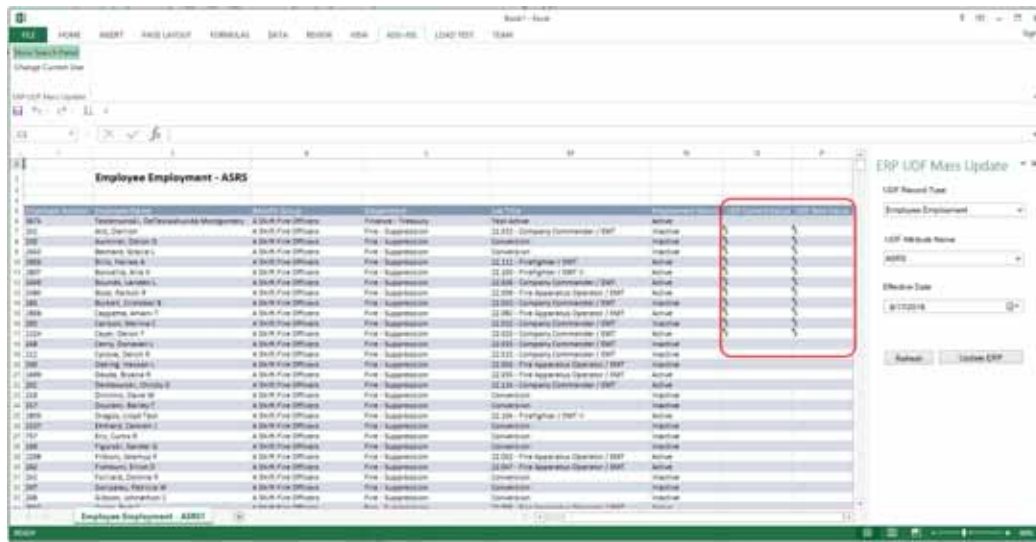
7 A popup will display, letting you know whether New World ERP has been updated successfully:



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:



- 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.

