

Enterprise - How to Setup and Manage Custom Data

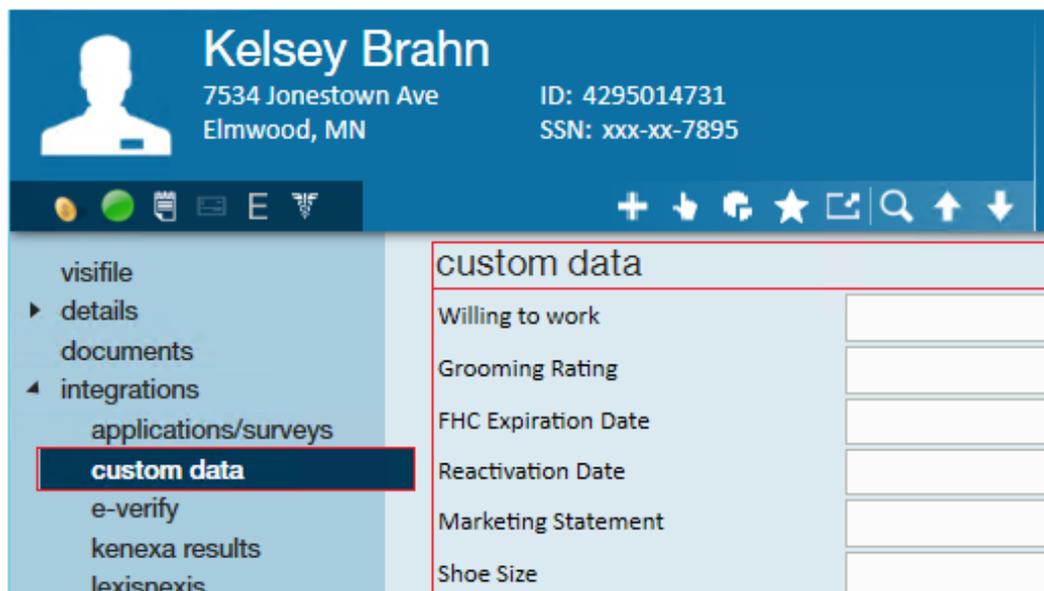
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What is Custom Data?

The custom data page is used for adding information on the employee, customer, order, assignment, or contact records, which does not currently have an existing field in TempWorks Enterprise; this includes anything from equipment rental documentation to marketing statements. Custom data fields will be available for searching and reporting purposes.

Note Only users with administration access can create custom data fields, making them available on Enterprise records.

Custom data fields can be found under Integrations > Custom Data on the employee, customer, order, assignment, or contact record.



The screenshot displays the user profile for Kelsey Brahn. The profile header includes a silhouette icon, the name 'Kelsey Brahn', and contact information: '7534 Jonestown Ave Elmwood, MN', 'ID: 4295014731', and 'SSN: xxx-xx-7895'. Below the header is a navigation bar with various icons. A sidebar on the left lists navigation options: 'visifile', 'details', 'documents', 'integrations', 'applications/surveys', 'custom data' (highlighted with a red box), 'e-verify', 'kenexa results', and 'lexisnexis'. The main content area shows the 'custom data' section, which is also highlighted with a red box. It contains a table with the following fields and input boxes:

custom data	
Willing to work	<input type="text"/>
Grooming Rating	<input type="text"/>
FHC Expiration Date	<input type="text"/>
Reactivation Date	<input type="text"/>
Marketing Statement	<input type="text"/>
Shoe Size	<input type="text"/>

Setting up Custom Data Fields

1. Navigate to all options > Administration > Custom Data

The screenshot shows the 'Administration' section of a software interface. On the left is a navigation menu with categories like 'accruals', 'adjustment', 'assessment packages', 'attendance', 'authorities', 'branch', 'business code types', 'commission', 'company', 'custom data' (highlighted), 'drop downs', and 'employers'. The main area displays a search bar 'Find a property', a dropdown for 'Origin Type' set to 'Employee', and 'Sort By' options 'Property Name' and 'Sort Order'. An 'Active' filter is set to 'All'. A list of properties is shown, including 'Farm A', 'Favorite Animal', 'Favorite Backstreet Boy', 'Favorite Cereal', 'Favorite Color', 'Favorite Mythical Creature', 'FHC Expiration Date', and 'Field Orientation Date', each with an 'Employee' origin type.

2. Select the + icon in the upper right
3. Fill out the following information:

The screenshot shows the 'Custom Data' configuration form. At the top, it says '90 items available' with a close (x) and add (+) icon. The form fields are as follows:

- Property Name: An Example Custom Value
- Origin Type: Employee
- Column Type: String
- Data List Values: 2 values
- Required:
- Active:
- Hierarchy: System
- Category: A third employee category
- Entered By: Andrew Rosenfrisk
- Date Added: 7/10/2019 1:57:00 PM
- Multi-Select:
- # Property Values: 0

- o **Property Name:** Name of field you are adding

- **Origin Type:** Record type this field will appear on (ex. employee record)

Origin Type	Employee
Column Type	Origin Type
Data List Values	Employee
Required	Customer
Active	Order
Hierarchy	Assignment
Category	Contact
Entered By	Employer
Date Added	Vendor
	Prospect
	WcClaim

- **Column Type:** How information is selected/entered for this field.

- True/False: Check box only
- Date: Calendar formatted field
- Decimal: Allows numbers and decimal point only.
- Guid: Must be unique for each record.

{ccd85bb7-4d22-4006-a618-eb3b8093f5e2}	Generate	Guid
--	----------	------

- Integer: Allows numbers only.
- Money: Currency formatted field
- String: Allows all alphanumeric characters
- Time: Time formatted field

- Optionally, add **data list values**

- Data list values allow you to change your custom data field into a drop-down option

Tshirt Size	
Secondary Car	Value
Reliable Transportation	Small
	Med
	Large

- Select the arrow to the right of the data list value section to open the options
- Enter a value you would like users to be able to select and then click 'New' to add it to the list of options:

- **Required:** Check this box to require this field be filled out
 - **Active:** Uncheck this box to have this custom data field deactivated (no longer seen or able to use)
 - **Hierarchy:** Select the hierarchy level this field applies to (Ex. Is it only for temp employees or for one specific branch?, or should this be set to System level)
4. Select the  icon in the upper left to save your changes.

Entering Custom Data on Records

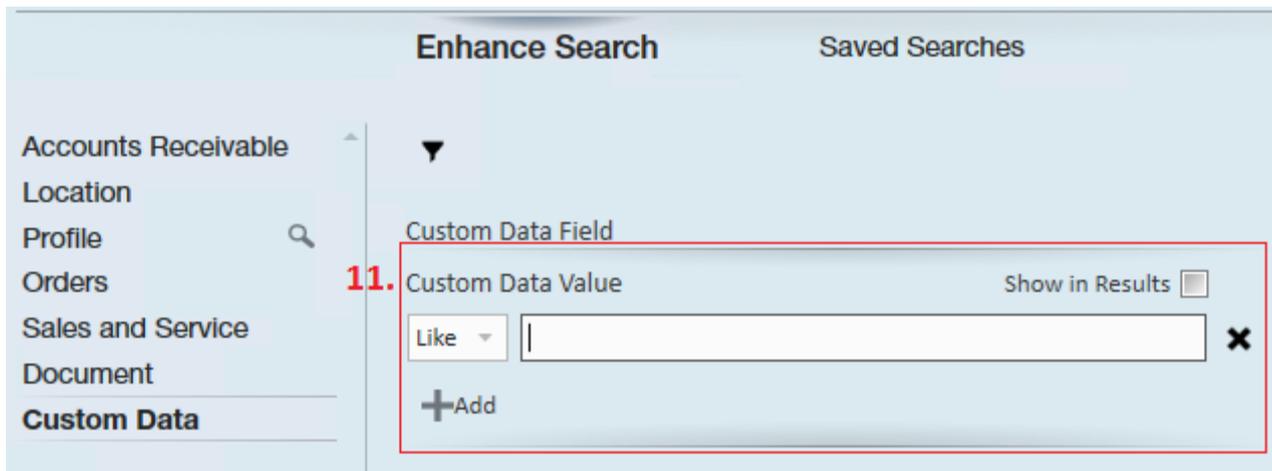
Navigate to the custom data form of any record (it will be located within the integrations section in the record's navigational tree):

Notice that the required fields are noted with a (6.) red exclamation mark. Also, following our example, the custom data field that was created earlier (7.) displays in the customer record as intended.

Searching custom data fields:

From the enhanced search area (8.) select custom data (9.) from the search categories. Select the custom data field you would like to search (10.):

Either enter the data you are looking for in the custom data value field (11.) or select show in results to view the data that is in the field select for each record that returns in the results:



Both the custom data field name will be displayed along with the data which resides in that field:

The screenshot shows search results for 8 items. The table has the following columns: Customer Name, Department Name, Branch, Active, Status, Phone, City, State, Custom Data Value, and Custom Data Field. The last two columns are highlighted with a red box. The data rows are as follows:

Custo...	Customer Name	Department Na...	Branch	Active	Status	Phone	City	State	Custom Data Va...	Custom Data Field
10623	Crom Equipment	Primary	Memphis SE	<input checked="" type="checkbox"/>	A	(651) 553-6553	Minneapolis	MN	No	Credit Documentation Received
429497...	Golden Pumpkin, Co	Primary	Memphis SE	<input checked="" type="checkbox"/>	P	6072256252	Eagan	MN	Yes	Credit Documentation Received
779261	Green Thumb	Primary	Memphis SE	<input checked="" type="checkbox"/>	A	(651) 143-2143x123	Columbus	OH	No	Credit Documentation Received
429501...	Ideal Incorporate	Corporate	Memphis SE	<input checked="" type="checkbox"/>	H	3123485739	Melbourne	FL	Yes	Credit Documentation Received
429499...	Longshot Farm	Primary	Memphis SE	<input checked="" type="checkbox"/>	A		Bloomington	MN	Yes	Credit Documentation Received
429497...	Midway Carpets	Primary	Memphis SE	<input checked="" type="checkbox"/>	H	6512563625	Eagan	MN	No	Credit Documentation Received
429497...	O'Brien Contracting	Primary	Memphis SE	<input checked="" type="checkbox"/>	A	(222) 222-2222 et 104	Minneapolis	MN	Yes	Credit Documentation Received
429496...	Red Marlin	Primary	Memphis SE	<input checked="" type="checkbox"/>	A		Eagan	MN	Yes	Credit Documentation Received

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