

Employee Contracts – Bookmarks for Custom Fields

APTAWEB-10550, -12095

Introduction

Custom fields on the employee, employee job, or master position records are now able to be added as bookmarks on the Employee Contracts. These fields must be configured properly in the Administration module before they can appear as bookmarks.

NOTE: At present, AptaFund has both “custom columns” and “custom fields”. This Technical Document will be discussing the “custom fields”, which are ones that users can create on their own. Custom fields can be configured in the *Administration* menu on the *Custom Field Configuration* screen. The following example is from a California database, which has the most custom fields.

Custom Field Examples

Home -> Administration -> Custom Field Configuration

Search Field Type : Starts With t ▾ [X] ⇨

↑ Custom Field For ✕

<input type="checkbox"/>	Field Display Name ↑	Field Type	Tag Group
Custom Field For: Employee			
<input type="checkbox"/>	CalSTRS Client ID	Text	
<input type="checkbox"/>	I-9 Reporting	Tag Group	I-9 Reporting
<input type="checkbox"/>	STRS Source Code	Tag Group	STRS/PERS Source Code
<input type="checkbox"/>	STRS Unit Code	Tag Group	STRS/PERS Unit Code
Custom Field For: Employee Job			
<input type="checkbox"/>	CalSTRS Assignment Code	Tag Group	CalSTRS Assignment Code
<input type="checkbox"/>	CalSTRS Contribution Transaction Type	Tag Group	CalSTRS Contribution Transaction Type
<input type="checkbox"/>	CalSTRS Earnings Type	Tag Group	CalSTRS Earnings Type
<input type="checkbox"/>	CalSTRS Expected Pay Periods	Tag Group	CalSTRS Expected Pay Periods
<input type="checkbox"/>	CalSTRS Service Type	Tag Group	CalSTRS Service Type
<input type="checkbox"/>	CalSTRS Time Base	Tag Group	CalSTRS Time Base
<input type="checkbox"/>	Employees Current Supervisor	Tag Group	EE Supervisor
Custom Field For: Master Position			
<input type="checkbox"/>	E-Verify Position Number	Text	

Figure 1: Example List of Custom Fields



Custom Field Configuration for Contracts

Custom fields which are visible on the *Manage Employee*, *Employee Jobs*, or *Master Position Management* screens can be added to contracts as bookmarks. From the *Custom Field Configuration* screen, click on one of the custom fields and click the “Use in Employee Contracts” checkbox. Then click Save.

Figure 2: Edit Custom Field

Adding Custom Fields to Contracts

On the *Employee Contracts* page, custom fields that have been configured properly can be added to contracts as bookmarks to the Page Header, the Body, or the Page Footer as follows:

- Employee: These are specific to the employee and can be added to any contract
- Employee Job: These are specific to the job and can be added only to contracts which do not use a Job Block or Other Job Block in the body of the contract.
- Master Position: These are specific to the job and can be added only to contracts which do not use a Job Block or Other Job Block in the body of the contract.

Figure 3: Contract Layout

To add a bookmark to the contract, click the button in the Layout section for Header, Body, or Footer, and then search for the custom field. Bookmarks for fields set up for the Employee screen start with "Employee:". Bookmarks for fields set up for the Employee Job screen start with "Job:". Bookmarks for fields set up for the Master Position screen start with "MP:".

Bookmarks are added to the contract by clicking on the bookmark name. In the example below, employee bookmarks (in RED) have been added in a table (in GREEN) to the contract body.

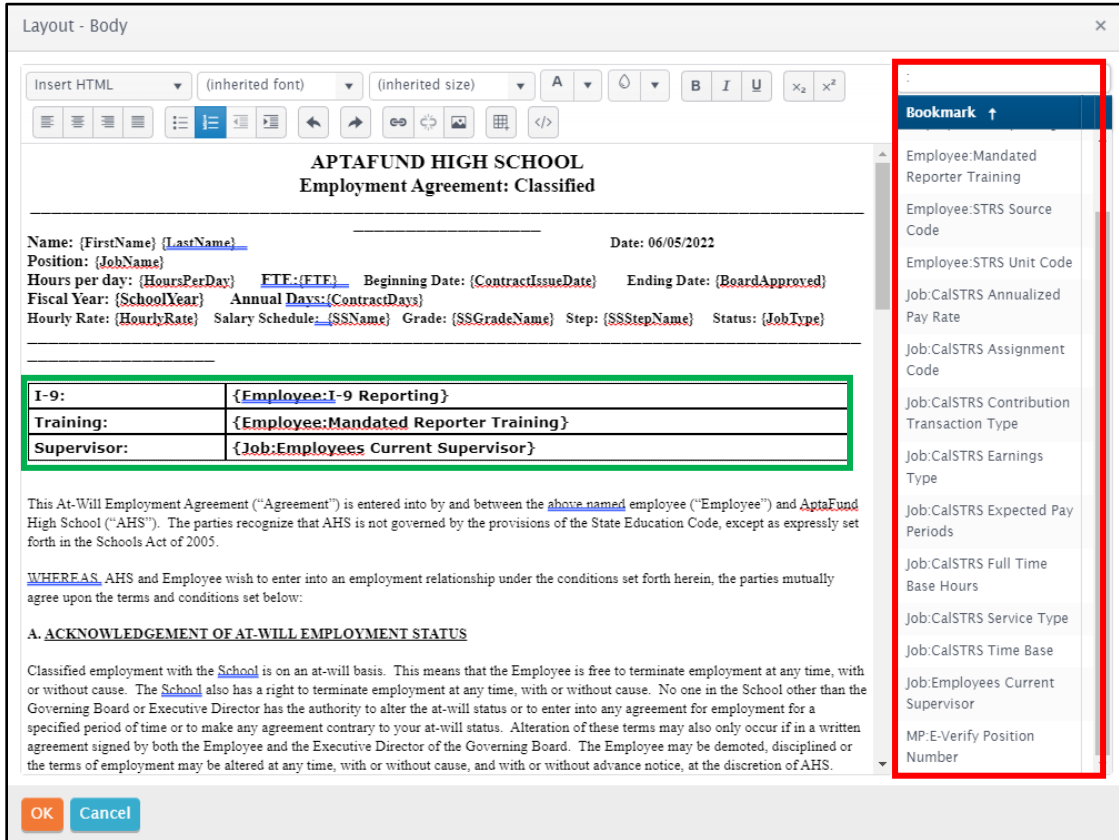


Figure 4: Custom Fields as Contract Bookmarks

If the contract has either of the "Include jobs..." checkboxes checked in the General section, then the only custom fields that will be eligible to be used as bookmarks are the "Employee" ones.

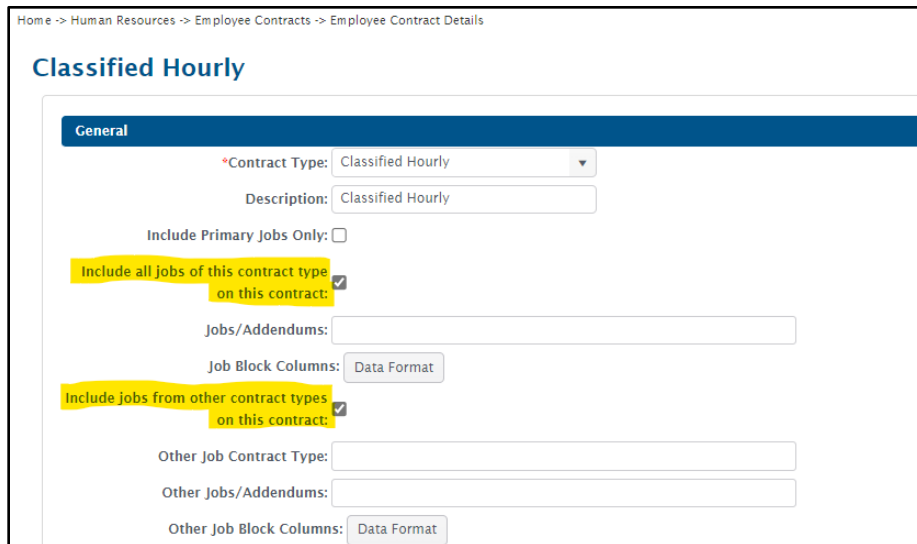


Figure 5: Include All Jobs Allow for Employee Bookmarks Only