

CleanOpsStaff-3ed FlexField Editor and Advance Reports

(Updated 5/23/2017)

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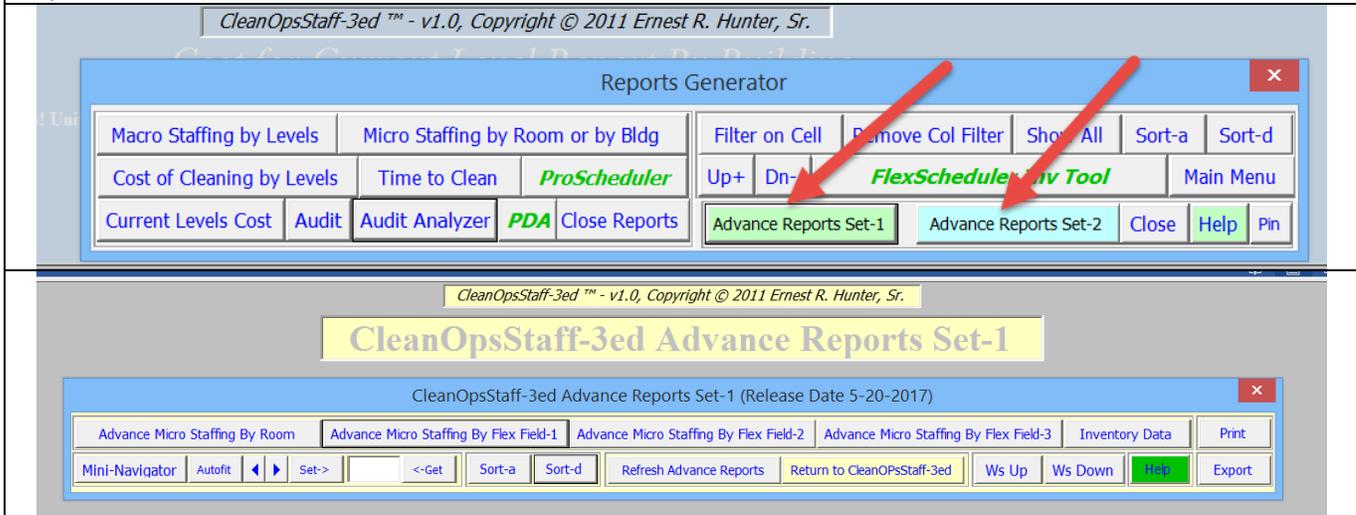
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Advance Reports Using Flex Field Data

The original CleanOpsStaff-3ed default reports ('Micro Staffing by Room' and 'Current Level Cost by Room') accessible from the *Report Generator* tool do not include the Flex Field column. There was also no capability to produce summary reports by multiple flex fields in the *Macro Staffing and Inventory Worksheet* Flex Field column.

The *Advance Report Set-1* button and the *Advance Report Set-2* buttons have been added to the *Report Generator* to launch the *CleanOpsStaff-3ed Advance Reports* add-in. The *Advance Reports* add-in can generate 'Micro Staffing' and 'Current Levels Cost' reports that include the Flex Field Column and it can generate Summary Reports summarizing data by Flex Field-1, Flex Field-2, and Flex Field-3 (see the below "[Flex Field Editor – Adding Multiple Flex Field to the Flex Field Column](#)" section of these instruction if you are not already familiar with the Flex Field Editor and the ability to have three flex fields in the Macro Staffing and Inventory worksheet Flex Field Column). The Advance Reports Add-In allows you to generate eight reports which now include data from the Flex Field column.

See the below screenshots for a visual of how to access the two Advance Reports buttons from the Report Generator and a visual of the two identical Advance Report toolboxes for Advance Reports Set-1 and Advance Reports Set-2.





Note that Advance Reports Set-1 generates 'Micro Staffing' reports that includes Flex Field data, and Advance Reports Set-2 generates 'Current Levels Cost' reports that includes Flex Field data.

You can produce advance reports that includes the Flex Field column without setting up the multiple Flex Fields described [below](#), however you will not be able to create Flex Field summary reports on Flex Field-2 and Flex Field-3.

To get the most benefit from the Advance Reports add-in, make use of the [Multiple Flex Field feature described below](#).

Most of the buttons in the Advance Reports tool are self-explanatory and you can get a screentip of what they do by pausing the mouse over them. The best way to learn to use the tool is to experiment with it.

Open the file 'C:\CleanOpsStaff-3ed Data\Inventory Training File-B-HECS-Data.xls' file and immediately save as '**Temp Flex Practice**' and experiment with using the tool. The 'Inventory Training File-B-HECS-Data.xls' file already has multiple Flex Fields in the Flex Field column for Zone, Crew Number, and Crew Leader. Go ahead and practice generating advance reports and using all the buttons in the Advance Reports toolboxes to print and export reports.

Training Exercise:

1. Open 'Inventory Training File-B-HECS-Data.xls' file and navigate to the Macro Staffing and Inventory worksheet and immediately save as '**Temp Flex Practice**'.
2. Adjust column width in as necessary (Using 'Auto' button and arrows to left of 'Auto' button).
3. Click 'Sel All' button in 'Records Navigator' along the top of the worksheet.
4. Click the 'Reports' button in the 'MiniToolBox' at upper left corner of screen.
5. Click yellow 'Advance Reports Set-1' button in the 'Reports Generator' toolbox and observe the message "You must run the 'Micro Staffing by Room' Report First" and click OK.
6. Click the 'Micro Staffing by Room or by Bldg' button and then click the 'Room' button.
7. Observe that the 'Micro Staffing by Room' report does not contain data from the Flex Field column.
8. Click the 'Advance Reports Set-1' button again and observe that Advance Reports Set-1 have been generated and the Advance Reports toolbox is visible at the top of the screen.
9. Observe and click the five buttons at the top of the 'Advance Reports' tool:
 - a. Advance Micro Staffing by Room – this is the same as the 'Micro Staffing by Room' report with the addition of the 'Flex Field' column inserted between the 'CSF' and 'Space Cat' columns.
 - b. Advance Micro Staffing By Flex Field-1 – this is a summary report summarized by Flex Field-1 which in this case is 'Zone'.
 - c. Advance Micro Staffing By Flex Field-2 – this is a summary report summarized by Flex Field-2 which in this case is 'Crew number'.
 - d. Advance Micro Staffing By Flex Field-3 – this is a summary report summarized by Flex Field-3 which in this case is 'Crew Leader'.
 - e. Inventory Data – this is a duplication of the 'Macro Staffing and Inventory' worksheet.
10. Pause your mouse over the other buttons in the 'Advance Reports' toolbox to see the screentip indicating what action they perform.
11. Click the 'Mini-Navigator' button to launch the Mini-Navigator. Experiment with the button until you are familiar with what action they perform.

12. Click the yellow 'Return to CleanOpsStaff-3ed' button to return to the CleanOpsStaff-3ed standard report.
13. Repeat steps 5 through 12 for except in step 5, Click blue 'Advance Reports Set-2' button in the 'Reports Generator' toolbox and observe the message "You must run the 'Micro Staffing by Room' Report First" and click OK.
14. You may delete the '**Temp Flex Practice**' file when you are done.

Flex Field Editor – Adding Multiple Flex Field to the Flex Field Column

Users have been asking if it is possible to add a couple of more flex fields so they can track other data items associated with their space (such as priority, Zone, Supervisor, Crews, Crew Leader, assigned custodian, etc.). After evaluating the time and resources that would be required to actually add physical columns in the Macro Staffing Inventory worksheet, Hunter Consulting and Training decided to develop the 'Flex Field Editor' tool as a more cost effective method of achieving the same goal.



The 'Flex Field Editor' tool allows you to enter three data elements in the Flex Field column which has the same effect as adding two additional flex fields. The original Flex Field item is referred to simply as the Flex Field-1 or 'Flex1' and it will continue to appear in the worksheet in the Flex Field column without brackets or braces. The two additional items are referred to as Flex Field-1 or '{Flex2}' and Flex Field-2 or '[Flex3]' and will be surrounded by brackets and braces respectively. The Flex Field Editor tool as shown in the above screenshot is made up of three identical sections that serve as editor for each of the three Flex Fields. The three sections can be used separately and independently to edit each Flex Field data element or used together to edit two of the data element or all three of them at the same time.

The first screenshot to the right is from the file 'C:\CleanOpsStaff-3ed Data\Inventory Training File-A-HECS-Data.xls' showing that the Flex Field column is being used to track the 'Zone' and 'Crew Number' for each space. This is a work-around which satisfies the need to track the two items, however, it is not ideal because the two data elements are bounded together and cannot be changed independently. Combining the two data elements also limits the flexibility in sorting the inventory based on the 'Zone' and 'Crew Number'. Keep in mind that one of the main purposes of the Flex Field Column is to provide flexibility in filtering and sorting the inventory for the purpose of scheduling and report generation.

238 Spaces 195,893 Total CSF	238 Zone-Crew (count)	Total Base Time (Hours) = 1,318.06	STAFFING (Both in Hours)
Cleanable SF (CSF)	Zone-Crew (Hours)	Base Time (Hours)	Category Or Local Custom Space Category
3,448	Z1-Crew 100	27.82	[LM] Public (Circulation) with Hard Floor
1,920	Z1-Crew 100	13.20	[LM] Cafeteria with Carpet
680	Z1-Crew 100	5.15	[LM] Office with Carpet Floor
1,836	Z1-Crew 100	0.80	[LM] Gymnasium (Wood Floor)
490	Z1-Crew 100	1.52	Local Conference Room
1,100	Z1-Crew 100	8.39	[LM] Public (Circulation) with Carpet Floor
780	Z1-Crew 100	0.34	[LM] Gymnasium (Wood Floor)
392	Z1-Crew 100	4.99	[LM] Washroom-High Use
777	Z1-Crew 100	6.27	[LM] Public (Circulation) with Hard Floor
57	Z1-Crew 100	0.56	Local Stairwell w/hard floor

The second screenshot to the right is from the same data set, however, the Flex Field column now accommodates three separate data elements independently ('Zone Number', 'Crew Number' and 'Crew Leader') and a new column heading from the configuration form.

238 Spaces 195,893 Total CSF	238 Zone (Crew Number) [Crew Leader] (count)	Total Base Time (Hours) = 1,318	MACRO ST
Cleanable SF (CSF)	Zone (Crew Number) [Crew Leader]	Base Time (Hours)	Standard Space C
3,448	Z1 (Crew 100) Johnny Joney	27.82	[LM] Public (Circu
1,920	Z1 (Crew 100) Johnny Joney	13.20	[LM] Cafeteria w
680	Z1 (Crew 100) Johnny Joney	5.15	[LM] Office with
1,836	Z1 (Crew 100) Johnny Joney	0.80	[LM] Gymnasium
490	Z1 (Crew 100) Johnny Joney	1.52	Local Conference
1,100	Z1 (Crew 100) Johnny Joney	8.39	[LM] Public (Circu
780	Z1 (Crew 100) Johnny Joney	0.34	[LM] Gymnasium
392	Z1 (Crew 100) Johnny Joney	4.99	[LM] Washroom-
777	Z1 (Crew 100) Johnny Joney	6.27	[LM] Public (Circu
57	Z1 (Crew 100) Johnny Joney	0.56	Local Stairwell w,
127	Z1 (Crew 100) Johnny Joney	1.24	Local Stairwell w,
3,802	Z1 (Crew 100) Johnny Joney	30.67	[LM] Public (Circu
170	Z1 (Crew 100) Johnny Joney	1.29	[LM] Office with
120	Z1 (Crew 100) Johnny Joney	0.91	[LM] Office with
136	Z1 (Crew 100) Johnny Joney	0.91	[LM] Office with

The Flex Field Editor tool is used to add Flex Field-2 and Flex Field-3. Flex Field-2 is enclosed in “{}”, Flex Field-3 is enclosed in “[]”, and Flex Field-1 is not enclosed with any special characters.

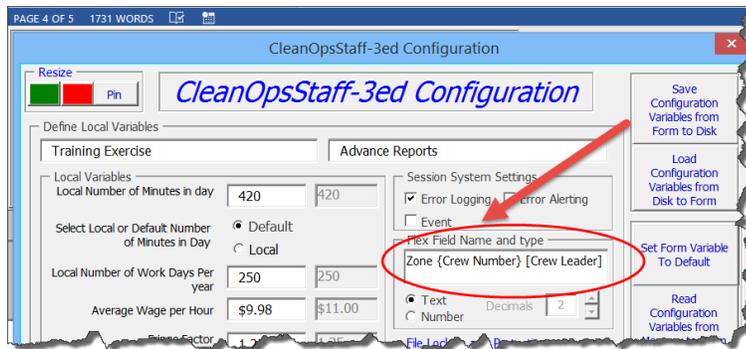
The Flex Field Editor allows you to edit the three data element independently as well as shift their position within the column providing maximum flexibility in sorting and filtering your inventory.

For example, if you wish to sort a range of rows by ‘Crew Leader Name’, you can use the Flex Field Editor to shift ‘Crew Leader Name’ to the front of the column and then sort on the Flex Field column.

The three sections of the Flex Field Editor work identically or together.

You can make the Flex Field column Heading reflex how it is being used by going to the Configuration Form and changing the Flex Field Name field. To get to the configuration form

1. Click ‘Function’ button.
2. Click the ‘Configuration’ button.
3. Enter the new heading as ‘Zone {Crew Number} [Crew Leader]’.
4. Click the ‘Write Configuration Variables from Form To Memory’ green button.
5. Click the ‘Close’ button to close the Configuration form.



The notes on the below screenshot indicate the purpose of each element of the Flex Field Editor.

Remove Button: Removes the value shown in the Flex1 input box from the selected rows if the value exists.

Remove All Button: Removes all values from the Flex1 in the worksheet.

Section Name

Read Button: Reads the Flex1 data from the current row of the worksheet into the input box.

Flex1 Input Box: For entering Flex1 data and for holding Flex1 data when the 'Read' button is clicked.

Read All Button: Reads all Flex Field data from the selected row into the three input boxes

Enter All Button: Adds data from all three Flex Field input boxes to the selected range of rows in the worksheet

Prompt Checkbox: Turn prompting on/off.

Flex3 Clear Button: Clear the input box

Flex3 Enter Button: Add data from input box to Flex Field column in the worksheet.

Shift Button: Shifts Flex3 to the back or front of the Flex Field column.

Front and Back Position Buttons: Set whether the 'Enter' button adds Flex3 data to the front or back of text already in the Flex Field column.

The best way to learn to use the tool is to experiment with it. Open the file ‘C:\CleanOpsStaff-3ed Data\Inventory Training File-A-HECS-Data.xls’ file and immediately save as ‘Temp Flex Practice’ and experiment with using the tool to add, remove, edit and shift three data elements within the Flex Field column.

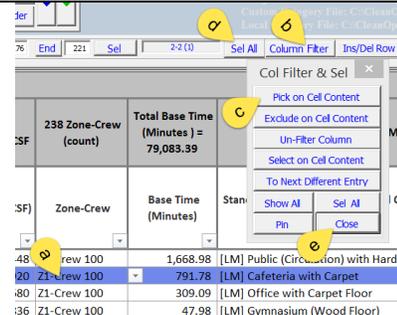
Training Exercise:

In this exercise we want to use the Flex Field column to track the Zone, Crew Number, and Crew Leader Name. The Flex Field Column already contains the Zone and Crew Number, but we want to separate out the three data element so we can sort, filter, and report on them separately. The below table contains the Crew Leader names.

Z1-Crew 100	Johnny Jones
Z1-Crew 101	Mary Wilson
Z2-Crew 200	Brenda Jackson
Z2-Crew 201	Willie William
Z3-Crew 300	Milton Taylor
Z3-Crew 301	Sue Baker

1. Open 'Inventory Training File-A-HECS-Data.xls' file and navigate to the Macro Staffing and Inventory worksheet.
2. Adjust column width in as necessary (Using 'Auto' button and arrows to left of 'Auto' button).

3. Filter so that only 'Z1-Crew 100' is visible.
 - a. Click in the Zone-Crew Column on 'Z1-Crew 100'.
 - b. Click the 'Column Filter button' in the 'Records Navigator' tool along the top of the worksheet.
 - c. Click 'Pick on Cell Content'.
 - d. Click 'Sel All'.
 - e. Click 'Close'.
 - f. Observe 50 spaces belonging to Crew 100.



4. Click 'Function' button.
5. Click Flex Field Editor** button.



6. Enter information in the Flex Editor toolbox as shown in the screenshot to the right.
 - a. Enter 'Z1'.
 - b. Enter 'Crew 100'.
 - c. Enter 'Johnny Jones'.
 - d. Click the 'Enter All' button.
 - e. Click 'Yes' when prompted.
 - f. Adjust Flex Field Column width. Observe that each cell in the column contain 'Z1 {Crew 100} [Johnny Jones]'.
 - g. Click 'Function' button to close toolboxes.
 - h. Click 'Show All' button to un-filter worksheet.
7. Repeat Steps 3 through 6 for the remaining five crews.



NOTE: You can use the Excel Auto Filter features to filter the worksheet instead of the 'Column Filter' button if you wish.

You may delete the 'Temp Flex Practice' file when you are done. You can also open 'C:\CleanOpsStaff-3ed Data\Inventory Training File-A-HECS-Data.xls' to see this exercise already completed.