

# Configurable Field Management

**ADDING FIELDS TO YOUR JOB REQUISITION  
AND CONDITIONS FORM**

## Introduction

Configurable Field Management within Talenlink allows you to create custom fields which can be used for your Job Requisition Template and your Conditions Form, which is useful for reporting and customising your environment within Talenlink to meet your organisation's needs.

This guide outlines;

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Throughout the guide, you will see the following icons which indicate the WMJobs Team's recommendations which will help you with all your Configurable Field Management queries.



**Top tips**



**Important Information**



**Best Practice**

## 1. Understanding Configurable Field Management

Within Configurable Field Management, you can create two types of fields within the system – a **Free Form Field** and a **List of Values (LOV)**.

A Free Form Field is one that an end user would enter data in to;

### Panel Chair Contact

Manager Name \*

Whereas, a LOV would be a drop-down list of values which a user would choose;

Interview type

Please select

1st Assessment

1st Interview

2nd Assessment

2nd Interview

Senior selection

Telephone interview

You are able to create LOV's and **link them together** by creating Parent/Child relationships between them, to make the experience of using Talentlink friendlier for your end user by determining the options your end user will see, based on the previous value they have selected, which will be explained more in the **Linking LOV's** section within the guide.

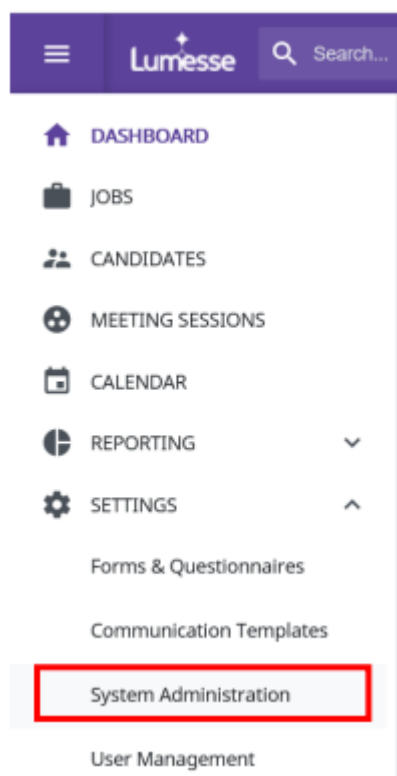
Once you have created your fields and are ready to use them, **you need to activate them in Organisation Properties**.

We have created a separate guide on activation, which you can find on the Service Centre under the topic homepage - **Organisational Properties**.

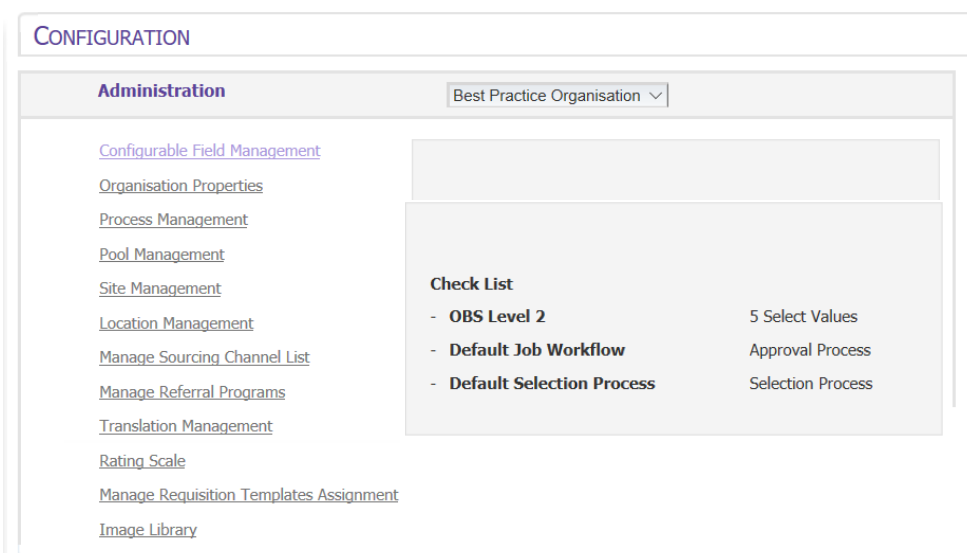
**Also, please be mindful that if you wish to make changes to your existing field names, this can affect your reporting which is covered in the Troubleshooting/FAQ's page, and also, on the Topic Homepage on the Service Centre.**

## 2. Creating a configurable Free Form Field

To access Configurable Field Management, log-in to Talentlink, and from the left-hand toggle menu, under '**Settings**', select '**System Administration**';



From the list, select '**Configurable Field Management**';



This will then show you a list of the fields that currently exist in your organisation locally. To add a Free Form Field, scroll to the bottom of the page and select '**Add Configurable Free Form Fields**';


[Add configurable Free Form Fields](#)

[Add configurable LOV](#)

[Link LOVs](#)

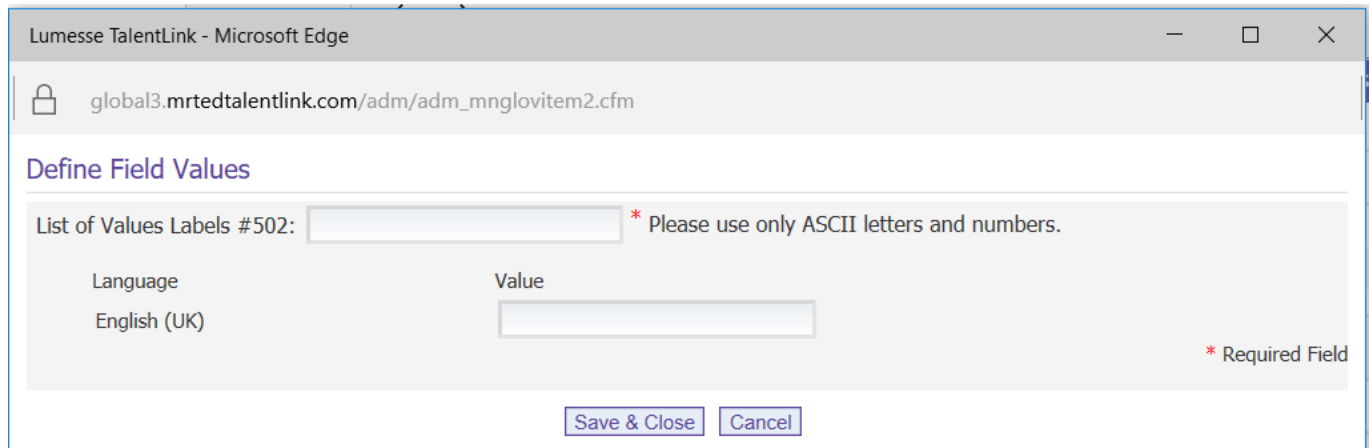


## Naming your field

You will then need to name your field and enter the values. To enter the name of the field, next to 'Undefined', click the  icon;



A pop-up window will then appear;



If this window doesn't appear, make sure that **you are allowing pop-ups** on the browser that you are using

Under 'List of Values Labels', type in the name of the field (which is mandatory). This is what the field will be named in Talentlink.



If the name of the field you enter already exists within Talentlink, you will receive an error message – **"Sorry, this description already exists"**. Click **'Ok'**, and choose another name

Underneath, next to 'English (UK)', is a field – here, you can enter the translation of this field which will appear to the **end user**.

Once you have entered the values, click **'Save & Close'**.

You will then see the name of the field has now been defined;

LIST OF VALUES

Current List of Values for *POSITION REQUIREMENTS (Position Requirements)*

Minimum of one record per list of values.

Action	#	Select Values
	1	Default value

## Adding values

Underneath, you will see a 'Default value' – there will always be a default. Under 'Action', click the icon.

You will see another pop-up appear, when you will need to enter the name of your value and 'Define Properties';

Lumesse TalentLink - Microsoft Edge

global3.mrtedtalentlink.com/private/adm/adm\_mnglovitem2.cfm

Define Field Values

Position Requirements:  \* Please use only ASCII letters and numbers.

Language

English (UK)

Value

\* Required Field

Define Properties

Format

Text

Required

☐

Save & Close

Cancel

Under 'Define Properties', you can select the **Format** of your Free Form Field. This restricts what type of data can be entered into the field by the user. See below the list of formats along with a description;

**Date** – this displays as a calendar with a data format selector

**Integer** – uses whole numbers only including negative number; no decimal numbers

**Numeric** – uses any numerical value including decimals

**Text** – user any letters, number of special characters

**Text Area** – provides a larger area than a 'Text' field



Text Area allows you to type **3000 characters**

Once you have entered the name of your values and defined the format of the field, you can then select whether this field is mandatory by placing a tick in the box next to '**Required**'.

Click '**Save & Close**' once all the details have been completed.

You will then see that the default value has been replaced with what you have typed, the format you have chosen, and whether the field is required;




LIST OF VALUES



Current List of Values for POSITION REQUIREMENTS (Position Requirements)  

Minimum of one record per list of values.

Action	#	Select Values	Format	Required
 	1	List skills required (List skills required)	Text Area	


















To add more fields underneath this group, click the  icon and follow the steps outlined above.

Once you are done with adding values to the group,  go back to your list of fields, click 

Your field will sit in your Configurable Field Management list;

CONFIGURABLE FIELD MANAGEMENT

Display ☒ Local in Organisation Best Practice Organisation ▾

#	Actions	Field Label
47		 On line application
203		<u>Location</u>
204		 <u>Sorting location</u> - Deactivated
205		<u>Sub location</u>
563		<u>DLLL Recruiting Process</u>
573		 <u>DLLL Grade</u>
577		 <u>DLLL SCP</u>
669		<u>DLLL Job Owner COV</u>
403		<u>Behaviour</u>
404		<u>Panel Chair Contact</u>
430		<u>DLLL Job Owner</u>
437		<u>Panel Chair Contact</u>
502		<u>Position Requirements</u>

Defining field properties

When a field has been created with its values, you will then need to **specify where the field can be used, by defining its properties.**

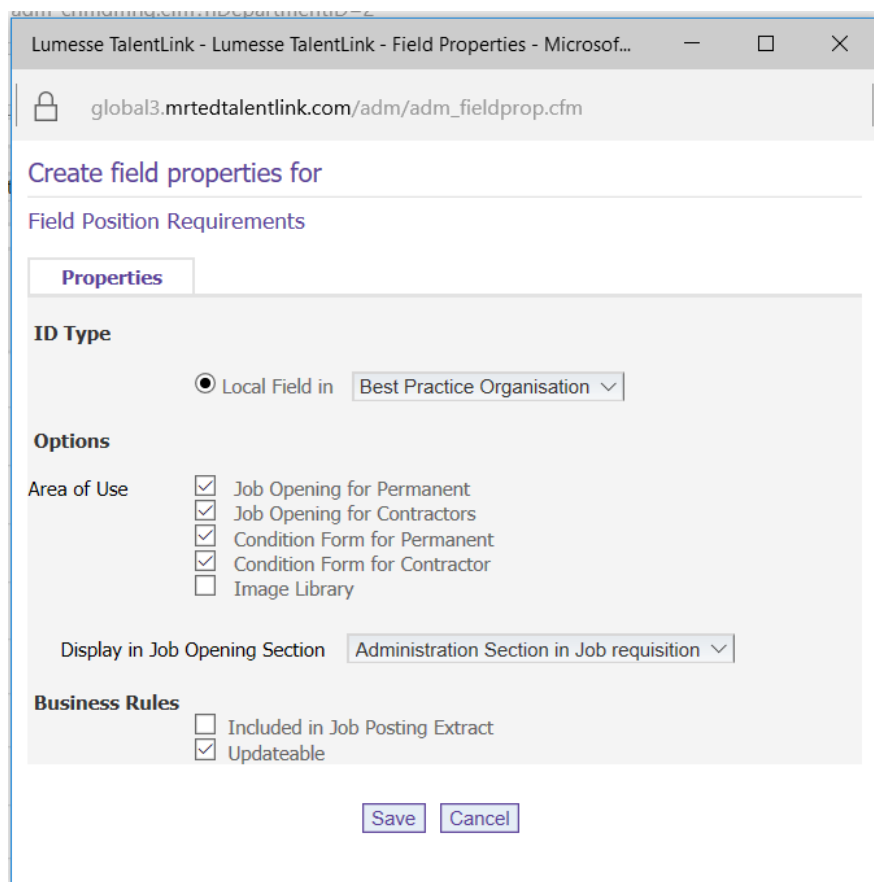
Click the pencil icon next to your field;

502



Position Requirements

Another pop-up will appear, and under '**Area of Use**', you will select whether you want this field to appear within your requisition by selecting '**Job Opening**', or your conditions form by selecting '**Condition Form**'. You can select the field to appear in both;



You will see there are two options for each section – '**Permanent**' and '**Contractors**'. **Contractors** is not a functionality that is used widely, so no harm in not selecting this, but make sure '**Permanent**' is always selected

If you have selected for the field to appear under **Job Opening**, you can select from the 'Display in Job Opening Section' drop down menu whether this will sit under the '**Administration Section**' or '**Contracts**' within the job requisition.

If you go to the overview of a job requisition, you will see two sections;

ADMINISTRATIVE DATA	CONTRACT
---------------------	----------

This is what the option relates to and dependent on what you select, will determine which section this field will appear under.

Once you have selected an option (if applicable), you will then see '**Business Rules**'.

'Included in Job Posting Extract' means that the field will display in job postings sent to agency email addresses or agency portals – **please note this is something that we are not currently using**.

'Updateable' allows the field to be updated in the area where it is displayed. **If this business rule is not select, users will be unable to change the values for this field.**

Once you have selected your options, click '**Save**'.



If at any point you want to amend the **Business Rules** for your field, click on the pencil icon next to your field name;

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Position Requirements

To amend the **values**, click on your underlined field name;

502



Position Requirements

### 3. Creating a list of values (LOV)

Navigate to **Configurable Field Management**, through your left-hand toggle menu by selecting '**System Administration**' under 'Settings'.


Once you have selected Configurable Field Management, at the bottom right of the screen, select '**Add configurable LOV**';

[Add configurable Free Form Fields](#)

[Add configurable LOV](#)

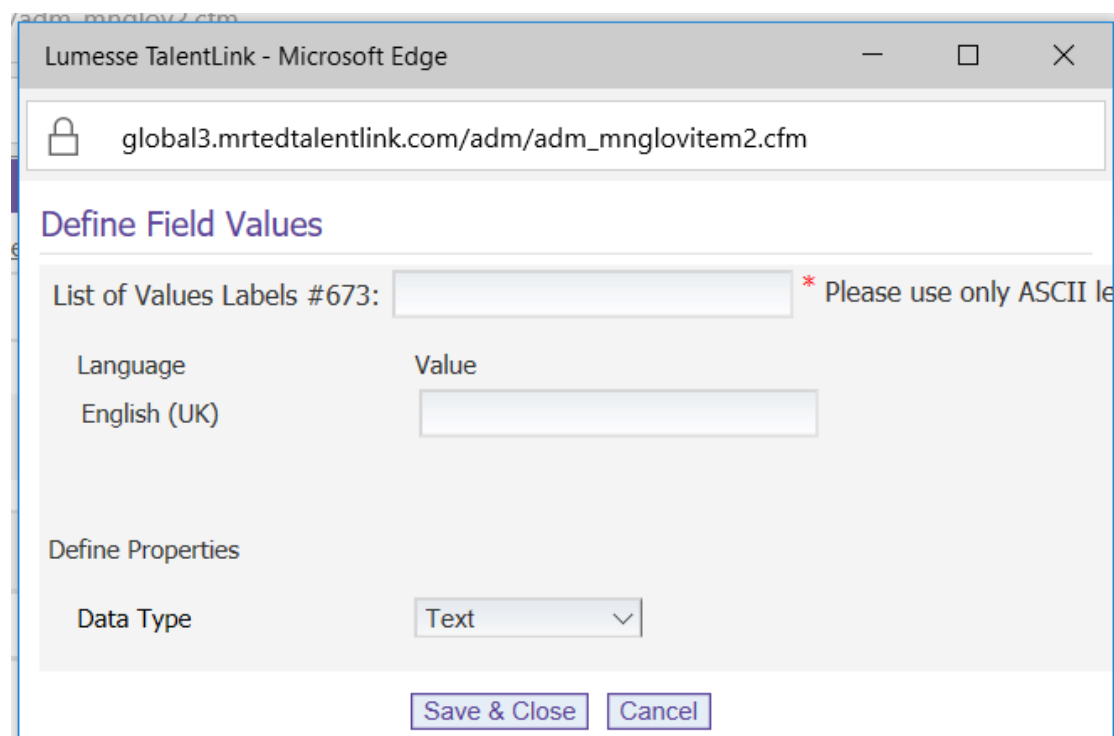
[Link LOVs](#)



Firstly, name your field. To enter the name of the field, next to '*Undefined*', click the  icon;



A pop-up window will then appear;



Enter the name of your field under 'List of Values', and the name which appears to your end user next to 'English (UK)'.

Here, you then select the LOV Data Type. The data types available are;

**Integer** – whole numbers only including negative numbers; no decimal number

**Text** – any letters, numbers or special characters

**Numerical** – any numerical value including decimals

**Positive Integer** – whole numbers only starting from 1; no negative numbers

**Boolean** – this is no longer used.

Once you have entered the information, click '**Save & Close**'.

You then add the values for your field. See '**Adding values**' on **Page 6**.



With an LOV, when you add values, **you are adding the values which will appear in a drop-down list visible to the user**, therefore, you are **unable to format** these unlike a Free Form Field as you do this through **Data Type**

Once you have created, named and added your values, you will again, need to specify where this field will appear.

Select the pencil icon next to your LOV name within your Configurable Field Management list and a pop-up will appear;

Again, you will select the 'Areas of Use', but you will see for an LOV, there are **more business rules** to define.

'Required' and 'Updateable' remain the same as outlined on **Page 7**.

The other options underneath are not options which are widely used in your Talentlink set-up;

**Searchable in Talentink**  
**Searchable in Career Section**  
**Included in Job Posting Extract**  
**Included in Application Extract**  
**Accessible as Consolidation in Reporting section**



Even though these are not widely used across the WMJobs set-up within Talentlink, **we recommend that you select all of these options** as if these are started to be used, you won't have to go back and select this later on down the line

Once you have defined the properties for your field, click '**Save**'.

## 4. Linking LOV's

You can create dependencies between pre-defined configurable LOV's by linking them to create parent/child relationships. Therefore, based on what a user selects for the 'Parent' value defined, depends on the options that they will see for the 'Child' value.



It's important to note that the dependencies for linked values **work differently to those in Forms and Questionnaires**. If you make a field available that you have created within Configurable Field Management, and have linked values together, **the fields available will show to the user indefinitely, regardless of what option you choose**

To link values, go to your Configurable Field Management screen, and at the bottom right, select '**Link LOVs**';

[Add configurable Free Form Fields](#)

[Add configurable LOV](#)

[Link LOVs](#)



The 'Linked List of Values' screen will appear. At the bottom left, click '**Add LOV**';

A list will then appear for you to select the LOV you want to use as the top level (Parent) in your list;

SELECT LOV	
Name	Actions
BP Grade	Select
BP Scale Point	Select
DLLLL Job Owner COV	Select
DLLLL Recruiting Process	Select
Location	Select
Sub location	Select

Click 'Select' next to the field name to choose this as your Parent value.

This will then have been added to your list of linked values;

WM Jobs Sandbox > [Home](#) > [Configuration](#) > [Configurable F](#)

### LINKED LIST OF VALUES

Display
☒ Local in Organisation
Bes

BP Grade

D ▶ DLLL Grade
On line application
Sorting Location

To add a Child to your value, right click the folder and select, 'Add Child';

Talent Acquisition by Lumesse

WM Jobs Sandbox > [Home](#) > [Configuration](#) > [Configurable F](#)

### LINKED LIST OF VALUES

Display
☒ Local in Organisation
Bes

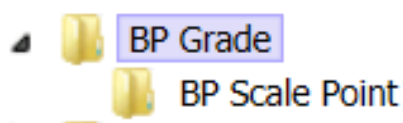
BP Gra
DLLL G
On line
Sorting

Add Child
Linked Values
Remove

Click 'Select' next to the name of the field you want to choose as your 'Child' for your second level;

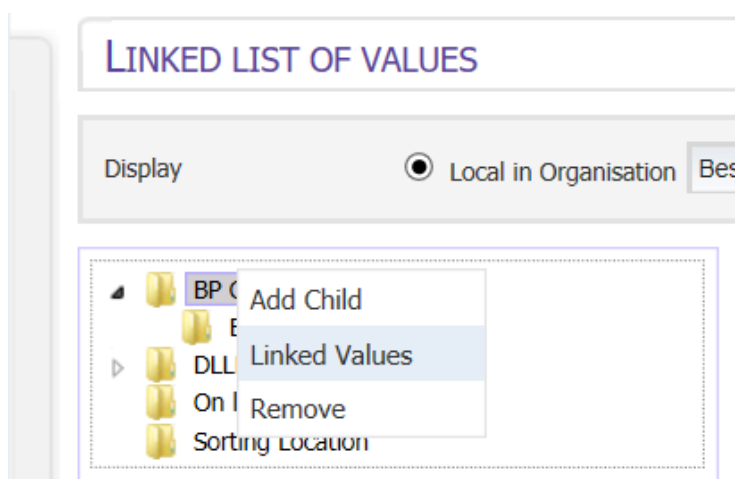
SELECT LOV	
Name	Actions
BP Scale Point	Select
DLLLL Job Owner COV	Select
DLLLL Recruiting Process	Select
Location	Select
Sub location	Select

The LOV is then added as a Child to your Parent LOV;



You can continue to add children to all levels of the list until the linked list is complete. The parent list can be linked to multiple children. A child list can be linked to more than one parent list.

To link values in child level lists to a value in parent level lists, right click the **parent** LOV and select, '**Linked Values**'.



The Link Values section will then be displayed. This section is used to assign the values in the child level list to the value in the parent level list.

The left side lists those values which are available and can be assigned as children. The right side shows which values have already been assigned.

# LINKED LIST OF VALUES

Display
Local in Organisation
Best Practice Organisation

Add Child
Linked Values
Remove
Sorting Location

## Link Values

BP Grade
Grade 1
Select Child
BP Scale Point

### Link BP Grade to BP Scale Point

Available Values
Select / Deselect All

☐ SCP 1  
☐ SCP 2  
☐ SCP 3

Selected Values
Select / Deselect All

Save
Close

Under 'Link Values', you can select the values within your parent LOV and start linking the values which sit in your child LOV to each other.

To link a value, select this on the left-hand side and click '**Save**'.

You will see the values you have selected move to the right-hand side.

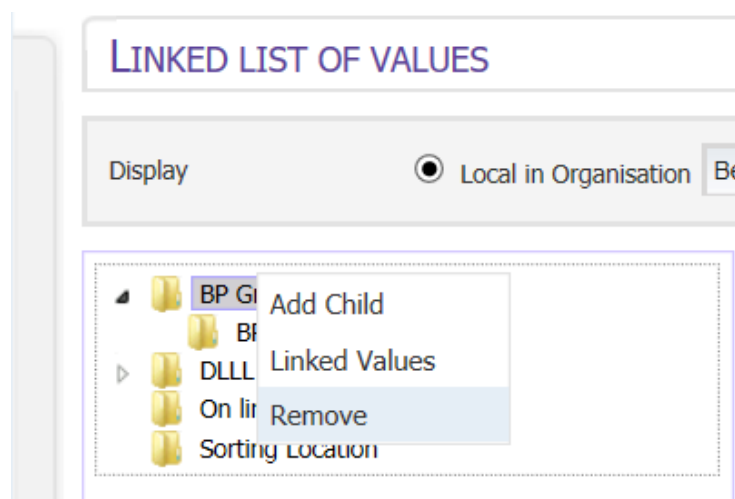
Continue to link values by selecting a value within your parent LOV, selecting/deselecting and saving.



You need to ensure that all values are linked correctly. For example, if you have a 'Yes/No' field, **values need to be linked to each option** – Yes **AND** No. If you have 'Yes/No' and an answer isn't required for one of the options, ensure you add a '**N/A**' value to the relevant value. If the fields are mandatory and no values have been linked to one of the options, on a job requisition, the field will show as '*Please select*' and won't let a manager progress any further as the question is mandatory and no value has been defined



To delete a linked list, right-click the list value, then select 'Remove';






The system will ask if you want to delete the linked values. Click 'Ok' to confirm.



This is just deleting the link values, **not the LOV's you have created through Configurable Field Management**

On your Configurable Field Management list, you will then see these LOV's are linked with another as a branch icon will appear next to them;

671		 <u>BP Grade</u>
672		 <u>BP Scale Point</u>

If you click on a branch, this will take you to the List of Linked Values page and show you the relationships between your LOV's.



**REMEMBER** – once you have created and linked your values you need to active these. Please see our **Organisation Properties** Training Guide on the Service Centre for steps on how to do so

## 5. Troubleshooting/FAQ's

### I can't find/amend a field within Configurable Field Management – why?

Firstly, if you are unable to find a field within your Configurable Field Management list that you are trying to amend, more than likely, this is a field that has been created by a Global System Administrator on the team which is used by several organisations across the board, rather than locally. An example of this would be 'Safeguarding check'.

Because of this, you are unable to change the values within these fields as this will have an effect on reporting for those organisations who use the field.

If you are using a Global Field and want to change the values, we would recommend that you create a new custom list by following the instructions within the guide and making this available through **Organisation Properties**. It is worth noting that only a Global System Administrator can de-activate and make amendments to a Global Field. *Please refer to Organisation Properties on the Service Centre.*

If you can't amend a value for a custom field, check the business rules of the field to make sure 'Updateable' has been selected;



Business Rules	
<input type="checkbox"/>	Required
<input checked="" type="checkbox"/>	Updateable
<input type="checkbox"/>	Searchable in TalentLink

### Will changing the names of values have an impact?

Yes – amending the name or deleting values within a list will have an impact on your reporting.

If you **amend the name** of a value within field you have created, this change will show instantly on reports, and on your job requisitions and conditions forms within the system, therefore, if you need to report of the old name of the value, we suggest that you de-active this value and create a new one. To de-activate, this is outlined in **Organisation Properties**.

If you **delete a value**, this will be removed from the system and you will no longer be able to report on this and the data relating to this **value cannot be retrieved**.

**Amending values can also have an effect on your contracts** if you are using these in conjunction with your conditions form as the merge fields built into your contracts are linked to the names of your fields. These have to match in order for data to be merged into your contract. Please check which fields sit in your contract before making amendments.

## You can now create and manage fields within Configurable Field Management!

We have outlined in this guide the essential information you need to create and link fields within Configurable Field Management, as well as points to think before amending or updating your fields.

Please refer to the **Organisation Properties** Training Guide on how to activate the fields you have created.

For more on configuration topics, please visit our solutions page on the Service Centre at <http://wmemployers.freshdesk.com/helpdesk>



Configurable Field Management is a short module featured in our **Open House Configuration Training**. If you or any colleagues are interested in attending an open house training session, please contact the team who will be able to provide you with further information.