
People-Trak®

Basic Training Guide

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Notes

Introduction

This document is used for all People-Trak training courses. Part 1 is a self-study segment that is not taught in class. It is assumed that all users in class are familiar with this material prior to class. Parts 2, 3, and 4 are taught in class. The actual parts you cover will depend on the course variation you are taking. Part 5 is a self-study segment that is not taught in class. It is supplementary material for users who wish to learn more about the administration features provided by People-Trak.

Lesson Format

Each lesson in this Training Guide is designed to last about 30 minutes. In a classroom environment, the first half of the lesson is presented by the instructor and covers the material presented in the lesson. If a self-teaching environment, the first half of the lesson is used to read the course material for the lesson. The last half of the lesson is a series of tutorials used to reinforce what you have learned in class or read on your own.

Daily Schedule

Segment 1	8:30 AM – 9:00 AM
Segment 2	9:00 AM – 9:30 AM
Segment 3	9:40 AM – 10:10 AM
Segment 4	10:10 AM – 10:40 AM
Segment 5	10:50 AM – 11:20 AM
Segment 6	11:20 PM – 11:50 AM
Lunch	11:50 AM – 1:00 PM
Segment 7	1:00 PM – 1:30 PM
Segment 8	1:30 PM – 2:00 PM
Segment 9	2:10 PM – 2:40 PM
Segment 10	2:40 PM – 3:10 PM
Segment 11	3:20 PM – 3:50 PM
Questions and Assessment	3:50 PM – 4:20 PM

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Document Conventions

The standard writing conventions used in this document are described below.

Pressing Keys

When an instruction involving a key on the keyboard is issued, the standard format shown below is used.

Press the ENTER key.
Press the DOWN ARROW key.

The phrase "press" indicates that a key is to be pressed down. The key name (ENTER and DOWN ARROW in the examples) is written out and capitalized. The phrase "key" always follows the key name.

The key names used in all instructions are generic and may differ slightly from the keys on your keyboard. For example, the ENTER key may be labeled RETURN or NEWLINE.

Entering Information

When an instruction involving a typed response is issued, the standard formats shown below are used.

Enter the employee number.
Enter "N."

The phrase "enter" indicates that a letter or phrase is to be typed on the keyboard. When a single letter or short phrase (such as "N" in the second example) is to be entered, the response is highlighted by quotation marks. When the response is actually typed, the quotation marks are not required and should not be entered.

The Phrase "Display"

The phrase "display" is used as a verb to describe the appearance of menus, prompts, processing screens, reports, and messages on the video screen. Examples are shown below.

The Color Dialog is displayed.
The message shown below is displayed.

The Phrase "Print"

The phrase "print" is used as a verb to describe the appearance of reports on the printer. Examples are shown below.

When the report has printed ...
This option is used to print the ...

The Phrase "Point"

The phrase "point" is used as a verb to describe how to move the mouse pointer such that the tip of the pointer (also known as the "hot zone") rests on a specific field, menu option, button, or area on the screen. An example is shown below.

Point to the Employee Last Name field.

The Phrase "Click"

The phrase "click" is used as a verb to describe the process of pressing and immediately releasing the mouse button without actually moving the mouse.

Click the Run button.

The Phrase "Double-Click"

The phrase "double-click" is used as a verb to describe the process of pressing and immediately releasing the mouse button two consecutive times without actually moving the mouse.

Double-click the desired item

1

Fundamentals

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Tutorial A.2 – Menu Navigation

Tutorial A.3 – Changing the Current Company

Tutorial A.4 – Stopping People-Trak

Tutorial A.5 – Logging Off

Lesson B – Navigation and Validation

Tutorial B.1 – Screen Selection

Tutorial B.2 – Selecting Sub-Screens

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Notes

Lesson A

Getting Started

The lesson introduces the techniques used to start People-Trak, navigate through the menus, change the current company, logoff, and stop People-Trak.

Source Text

People-Trak Basics – Chapter 3

People-Trak Basics – Chapter 4

Tutorials

Start People-Trak: This tutorial demonstrates the techniques used to start People-Trak.

Menu Navigation: demonstrates the methods used to select and navigate menu options.

Changing the Current Company: demonstrates two methods used to change the current company to one of the companies to which you have been granted access.

Stop People-Trak: shows how to stop People-Trak when a processing session has been completed.

Logging Off: shows how to logoff the current user without actually stopping People-Trak.

Tutorial A.1

Start People-Trak

1. Select People-Trak using the appropriate icon or menu entry. The Login dialog is displayed.
2. The Login dialog is the gateway to People-Trak. The user ID/password you enter here determines which programs you can use and which information you can see. When the User ID/Password window is displayed, the cursor is positioned to the user ID field. Let's learn a few things about entering user ID/password combinations as well as other information in People-Trak.
3. Enter the user ID "DEMO" and press the TAB key. The cursor moves to the Password field. Enter the bogus password "BOGUS", but do not press the TAB or ENTER key. As the password is entered, note that an asterisk is displayed for each character entered. The asterisks are displayed to let you know that something is happening. The actual characters of the password are not displayed for security reasons.
4. Press the ENTER key when complete or select the OK button. The message shown below is displayed because the password "BOGUS" is indeed bogus.

Invalid User ID/Password Combination

5. This message and all similar messages are displayed in a message box. The message box pops up to get your attention and is cleared when you take the appropriate

action. In this case, the message box contains a single button. You can press ENTER to select the action indicated by the button, or you can use the mouse to click on the button.

6. Press the ENTER key to continue. The user ID and password entries are cleared and the cursor is returned to the user ID field so that you may try again. Each time you start People-Trak, you have three attempts to enter a correct user ID/password combination. If the third attempt fails, you are automatically returned to Windows. Let's demonstrate this.
7. Enter "BOGUS" and press the ENTER key. This time, use the mouse to select the OK button. Repeat this process one more time. After the invalid user ID/password, you are swiftly returned to Windows. People-Trak has assumed that you are an unwanted intruder because you do not know a valid password and has forced you to start over. This may seem rude, particularly if you tend to forget your password or make a lot of typing errors, but it does thwart hackers who will sit for hours trying to break the security.
8. Select the People-Trak icon again. The Select User dialog is again displayed.
9. Enter the user ID "DEMO" and the password "DEMO" and press the ENTER key. The Select Module dialog is displayed.
10. The Select Module dialog is used to select the module you wish to work with. A module can be selected by a simple mouse-click. Try it now. Select the Personnel module. After a few seconds, the basic environment screen is displayed. Other than the menu bars and tool bars, it is just a big gray background. However, you are in the module and you are ready to continue with the next tutorial.

Tutorial A.2

Menu Navigation

When you first select a module you can start virtually all of the options in that module. As you will see later, once a record or another process has been selected, or if a new record is in progress, many options are disabled to avoid processing conflicts. For now, let's learn how to navigate in People-Trak.

1. People-Trak uses standard Windows operating conventions. You can see the Menu Bar at the top of the screen. You can activate the menu by using the mouse to click on the menu title, (or you can press the ALT key and the underlined letter in the menu title for your keyboard people). Let's try it now.
2. Use the mouse to click on the File Menu. The menu is popped up and lists the various options that are available. Those options that are listed in black are available, while those that are grayed out are not. You can highlight and select any available option. We'll do that later. For now, let's clear the menu.

3. To clear a menu, move the mouse off the menu and click. The menu is cleared. You can also clear a menu by pressing the ESC key.
4. Now is a good time for you to peruse each of the menus. Using the desired technique, select each of the menus listed and review the menu. Do not select any of the menu options themselves at this time. If you note that options are grayed out, this is because the option is either not available because it is dependent on another process or because you have been restricted by the System Administrator. Once you have made yourself familiar with the menus, continue with the next step.
5. Now it's time to select an option from one of the menus. First, select the File Menu and then select the Open Employee option.
6. The Lookup dialog is displayed. We'll learn more about this later. For now, press the Cancel button to clear the option.
7. This is really all there is to menu navigation. Certain menu options will display other menus, but in each case these same operating conventions apply.
8. Clear any menus or dialogs and continue with the next tutorial.

Tutorial A.3

Changing the Current Company

You can change the current company at any time to any other company to which you have access. There are two ways to do this. You'll try each below.

1. Using your recently acquired menu navigation skills, choose the Select Company option from the File Menu. A list of the companies to which you have been granted access is displayed.
2. To select a company, highlight the company name and press OK. Or, highlight the company and press the ENTER key. Or, highlight the company and double-click the highlighted row.
3. Go ahead and select a company. You may now continue processing just as before except that all processing will now be within the company you have just switched to. Nothing else has changed. You are just working with a different collection of data.
4. Now we'll use another method to select a company and conveniently set the company back to the one we wish to work with. Locate the Company Dropdown on the Tool Bar. You'll see the current company name and the small arrow just to the right. Click on the company name and you will see a dialog with details about the current company. Try it now. Then, close the dialog.
5. Now click on the arrow portion of the Company Dropdown. This time, the same list of companies is displayed as with the first company selection method described above. Go ahead and select the company you

originally started with. Be creative, use a different selection method than you did the first time.

6. Continue with the next tutorial

Tutorial A.4

Stopping People-Trak

People-Trak uses standard Windows operating conventions. Closing dialogs can be done in two different ways: you can use the "X" button (Close Dialog button) in the upper right hand corner of the dialog, or you can use the appropriate option on the File Menu. If any dialogs are in use when it is time to exit, that dialog and any other open dialogs must first be closed. Let's set up this scenario and then exit.

1. Select the Tables menu. At the Tables menu, select the Table Edit option. From the list of tables, select the Department table. Unofficially, you are now editing the Department table. Now let's assume that it's time to go to lunch and you wish to exit.
2. Select the Exit option from the File Menu or click the "X" in the corner of the dialog. This will close the dialog and return you to the generic environment screen.
3. Now select the Exit option from the main File Menu or click the "X" in the corner of the dialog. You will exit People-Trak and return to Windows.
4. Continue with the next tutorial.

Tutorial A.5

Logging Off

You do not have to exit People-Trak completely when you wish to stop processing. You have the option of simply logging off. You may wish to do this when you are finished with a session, or when you wish to log on as another user. This final tutorial will test many of the things you have already learned.

1. Start People-Trak and login with DEMO / DEMO.
2. Select the Personnel module
3. Now let's assume that you wish to logout. Select the File Menu and you will notice that there is an option labeled "Logoff 'DEMO'". Before you select this option, you should note that the actual message differs depending on the user ID of the user who is logged in. Now go ahead, and select the option.
4. The Select User dialog is displayed. You can now login again as the same user or as any other user.
5. This tutorial and this lesson are now complete. Exit People-Trak by clicking the Cancel button on the Select User dialog.

Lesson B

Navigation and Validation

This lesson describes the techniques used to navigate between the various screens in a People-Trak module. It also describes the data validation and formatting features of People-Trak.

Source Text

People-Trak Basics – Chapter 4

Tutorials

Screen Navigation: demonstrates how to navigate among the screens that are provided within each module. This includes three different methods for changing the current screen.

Selecting Sub-Screens: shows how to select a sub-screen from a primary data entry screen and to subsequently exit the screen either saving or abandoning any changes made on the sub-screen.

Data Validation: demonstrates how the data validation features work to prevent invalid data from being saved to the underlying People-Trak database.

Formatting Examples: demonstrates how data is formatted when it is entered.

Tutorial B.1

Screen Navigation

It takes a number of screens to collect and display all of the information for an employee or applicant. This tutorial demonstrates multiple ways to navigate these screens.

1. Start People-Trak, login with DEMO/DEMO, and select the Personnel module using the techniques learned in Lesson 1. Now follow the instructions below to select an employee. (You will learn more about selecting records in subsequent lessons.)
2. Select the Lookup option using the Open Employee option on the File Menu or the Open icon on the Tool Bar. The Lookup dialog is displayed. Click on the search button to display the list of records in the DEMO company. Select Donald Stern from the list by highlighting his name and double-clicking on that row.
3. The "Personal" screen is displayed for Donald Stern. The name of the current screen is listed in the Screens Dropdown on the Navigation Bar. Look for the phrase "Personal". This box acts as a both a label for the current screen as well as a list box for selecting any of the other screens. Let's use this Screens Dropdown to select a different screen now.
4. Use the mouse to click on the arrow button connected to the Screens Dropdown. A list of the available screens is displayed. Click on the Status screen. The Status screen with the status information for Donald Stern is displayed.

5. Try it again. Select any of the screens listed and see the information. When you are comfortable with the concept of selecting screens using the Screens Dropdown, continue with the next step.
6. There are a couple of other techniques that can be used to move to another screen. Let's try these now. Look at the blue arrow buttons just to the right of the Screens Box.
7. Click the right arrow button. The next screen is displayed and the screen name in the Screens Dropdown is updated. The next screen that is displayed is always the next screen relative to the current position in the Screens Dropdown. For example, if you are at the Personal screen and click the right arrow button, the Status screen will be displayed. If you are at the Status screen, the Compensation screen will be displayed. If you are at the last screen in the list, the first screen will be displayed.
8. You have probably already guessed, but the left arrow identically to the right arrow except in the opposite direction. Try it now. Again, note how the screen name in the Screens Box is updated to let you know where you are. When you are comfortable with the function of the buttons, continue with the next step.
9. There is one final method for browsing through the screens using keys. The PAGE UP and PAGE DOWN keys perform the same functions as the right and left arrow buttons. Try the PAGE UP and PAGE DOWN keys now. The succeeding and preceding screens are displayed and the screen name is updated in the Screens Dropdown.
10. Any of these techniques can be used at any time. There is no right or wrong way. You will find that it takes two clicks on the mouse to pick any screen using the Screens Dropdown, while it can take multiple button presses or PAGE keys to move to the desired screen. The particular techniques you use in any particular case will become second nature as you grow accustomed to People-Trak.
11. Use any desired technique to return to the Personal screen. Continue with the next tutorial.

Tutorial B.2

Selecting Sub-Screens

There are both "full-screen" data entry screens as listed in the Screens Dropdown and pop-up sub-screens that are used to capture and display additional information that is related to the general subject defined by the full screen. For example, on the Personal screen, there are sub-screens for emergency contacts, company property, and notes. Let's show you some pop-up windows and how to select them.

1. When concluding the last tutorial, you left the Personal screen displayed for Donald Stern. On that screen, note that there are three (or four) large buttons just to the right of the data entry screen. Each of these buttons is labeled with the name of a sub-screen.
2. The technique used to display a sub-screen is quite simple. Just use the mouse to click on the button. Try it

now to select the Emergency button. When the sub-screen is displayed, you can see the additional information regarding the emergency contacts for Donald Stern.

3. Each sub-screen has a File Menu, as well as an “X” in the upper right hand corner. When you are finished viewing, changing, or adding information, simply use the “X” or the Exit option on File Menu to exit. If you have made any changes and you use the File Menu, the changes are automatically saved. If you have made changes and use the “X” button, you will be prompted to save the changes in process. Let’s try both.
4. Make a simple change to the Emergency Contact sub-screen. Then use the Exit option on the File Menu.
5. Return to the Emergency Contact sub-screen using what you have learned earlier in this tutorial. Note that your change was saved. Now change the information back to way it was and press the “X” button. The prompt shown below is displayed.

Do you want to save the changes in process?

6. Click on the Yes button to save the change. If you had clicked on the No button, the changes (any and all) would have been ignored. If you had clicked on the Cancel button, you would have been left on the sub-screen to continue processing.
7. Now try the sub-screens for Property and Notes just to show that sub-screens all work alike.
8. The sub-screens on each screen are of the same subject matter as the screen itself. You can see this for yourself by browsing through each of the screens and popping each of the windows. Try it now.
9. Once you have popped a sub-screen, the pop-up feature is disabled until you return to the current main screen. In other words, it is not possible to pop a sub-screen on top of a sub-screen.. To see for yourself, return to the Personal screen and select the Property pop-up. While the Property sub-screen is displayed, the buttons for all of the other sub-screens are disabled.
10. Return to the Personal screen and continue with the next tutorial.

Tutorial B.3

Data Validation

Data validation protects the database from receiving incorrect or inappropriate data from the data entry process. Data is validated during data entry both when keys are pressed and when you leave the field.

1. On the Personal screen for Donald Stern, position the cursor to the Birth Date field. This field contains the current birth date. Clear the birth date.
2. Try to enter a birth date that contains letters. Note that the letter characters are rejected and are not displayed in the date field. This is an example of data validation that

is performed during the data entry process. The only keys that are valid at date field are the dash, the slash, and the numbers. This same principle also applies to numeric fields. Let’s try it.

3. Use your newly acquired screen navigation skills to position the cursor to the Rate field on the first blank row of the Compensation Screen. The Rate field is a numeric field and can only accept numeric values. Try a few characters and then try a few numbers. Finally, try the period (decimal point) and the dash. The dash is needed because it is used to indicate negative (less than 0) numeric values. You cannot enter the dollar sign.
4. Preventing unwanted keys is not a foolproof way of preventing invalid data. You can still enter an invalid date using only the valid keys and you can still enter an invalid number using only the valid keys. Return to the Birth Date field on the Personal screen and we will demonstrate what happens.
5. Enter the birth date “33-33-3333”. No invalid keys have been used, but the date is invalid because there are only 12 months in a year and no more than 31 days in a month. To see what happens, press the ENTER key. The message shown below is displayed.
6. Invalid Date
7. Data entry errors are not often as obvious as this outrageous date. Try the example again, but enter the date “06-31-2002”. This looks like a valid date, but June has only 30 days. This error will be detected and the data entry rejected. If you need further examples, try February 29 in a non-leap year or some other subtle but incorrect date. The invalid data entry will be caught and rejected before it can be stored in the database.
8. As mentioned, validation must occur whenever you leave the field, not just when you press the ENTER key or TAB key. Try this. Enter an invalid date, but do not press ENTER or TAB. Instead, try to select another screen as a way of getting past the error. You won’t make it. The error will still be detected and your bad date rejected. This same feature works with any field that requires validation including numeric fields that do not match the decimal pattern or size constraints of the field. You can try your own examples if you like.
9. Return to the Personal screen and then continue with the next tutorial.

Tutorial B.4

Formatting Examples

Formatting is the process of displaying data in a desired form. There are many ways to display dates, numeric values, and text phrases. The formatting attributes of each field are stored within People-Trak. These attributes can be changed using the customization features in People-Trak, but that is another lesson in another course. This tutorial will show how the formatting actually works.

1. Position the cursor to the Last Name field on the Personal Screen. By default, the Last Name field has been provided with the “proper case” formatting attribute. In general, the proper case attribute makes the first character of each word upper case and makes the other characters lower case.
2. Clear the Last Name field and then the last name “jones” in full lower case. Then press the ENTER key. The last name will be reformatted to “Jones”. Try it again, but key the entire name in upper case. When you press the ENTER key, the last name will be formatted as before.
3. The proper case attribute is reasonably smart when it comes to formal names. To see what I mean, enter the last name “macdougall” in any desired case pattern and watch what happens when you press the ENTER key. The last name will be echoed in the format “MacDougal” as is appropriate. Most variations of names are handled correctly, as are common abbreviations such as RR, PO Box, etc.
4. There are other formatting attributes for different types of fields and they work the same. If you enter the field in the wrong format, but the entry is valid, the entry will be formatted appropriately. For example, numeric fields have a formatting attribute that determines total length and decimal places. Let’ see how this works.
5. Position the cursor to the Std Hours field on the first blank row of the Compensation screen. This field has the format “##.##” which means that you can enter up to two digits to the right of the decimal place and up to two digits to the left of the decimal place. If you enter the value “9999”, you will receive a validation error because the entry is not valid according to the format. However, if you enter the value “99.9” or “9.99” you will not receive a validation error, because the values can be formatted to “99.90” and “9.99” respectively. Try these examples and any other range of numeric values that are or are not applicable to this format.
6. This tutorial and this lesson are now complete. Exit People-Trak using the techniques you have learned.

Notes

Lesson C

Operating Conventions

The lesson describes and demonstrates many of the standard operating conventions provided by People-Trak including special colors, cut/copy/paste, date stamp, undo, and grid features such as inserting, deleting, and sorting rows.

Source Text

People-Trak Basics – Chapter 4

Tutorials

Undoing Fields: demonstrates the techniques used to undo individual fields one at a time, including the ability to perform multiple undo's on the same field.

Undo an Entire Screen: shows how to undo the data entry on an entire screen with a single action.

Deleting and Inserting Rows in a Grid: demonstrates the button based and key based methods for deleting and inserting rows on any grid where these capabilities are enabled.

Sorting Rows in a Grid: shows how to sort the rows on any grid where the sort capability has been enabled.

Tutorial C.1

Undoing Fields

Undo is a powerful feature that lets you correct mistakes and return data to a prior state. Here's how to use the feature on a field-by-field basis.

1. Start People-Trak and login as you have learned in prior lessons. Select Donald Stern as we did in the last lesson. Here's how.
2. Select the Lookup option using the Open Employee option on the File Menu or the Open icon on the Tool Bar. The Lookup dialog is displayed. Click on the search button to display the list of records in the DEMO company. Select Donald Stern from the list by highlighting his name and double-clicking on that row.
3. To demonstrate the Undo feature, we need to make changes to some fields. Rather than just making changes, we will demonstrate the cut, copy, and paste feature of People-Trak to make these changes.
4. Position to the Last Name field. Select the contents of the field using the mouse or using the Select All option from the Edit Menu. Then use the Cut button on the Tool Bar or the Cut option on the Tool Bar to cut (delete) the contents of the Last Name field. The Last Name field should end up blank.
5. Move the cursor to the First Name field and use the Paste button on the Tool Bar or the Paste option on the Edit Menu to paste (insert) the text that was cut from the Last Name field into the First Name field.

6. Position to a few other fields and paste the contents of the Last Name field into those fields as well. Now we have some changes to work with.
7. First, note that the fields that have been changed are in a different color than the fields that have not been changed. This makes it easy to see what you have done. Now position the cursor to blank Last Name field. Note that the Undo button becomes enabled. (If you position to an unchanged field, the button will be disabled. Try it if you do not believe me). Any field that has been changed, as indicated by the modified color, can be undone. Let's try a few.
8. Click the Undo button and the Last Name field that was modified (by having been deleted with the Cut feature) is restored. The color is reset to the unmodified state and the Undo button is disabled because there is now nothing to undo at this field.
9. Before you undo any other fields, use the Edit History button on the Edit Menu to display the Edit History log. Note that all of the changes you have made, except for the Last Name change that was undone, are listed. Now close the Edit History dialog and undo all of the other fields one after another. When there are no fields in the modified color, you are finished. Now try the Edit History Log again. There should be no remaining changes because all of them have been undone.
10. The undo feature supports multiple undo's for the same field. To show how this works, change the Last Name field four or five times. Use whatever technique you want. Use the Edit History log to verify that all of the changes to the field have been recorded. The Before and After columns should indicate the progress you made.
11. Now use the Undo button to undo the first change. Note that the color does not revert back to the unmodified state and that the Undo button remains enabled. Now, undo each of the changes until you have restored the Last Name field to the original phrase. Now the color has been restored and the Undo button is disabled.
12. Continue with the next tutorial.

Tutorial C.2

Undo an Entire Screen

The last tutorial showed you how to undo fields one at a time. If you make a lot of mistakes or if you inadvertently delete rows in a grid, you can undo all of the changes on a screen at one time. The technique is quite simple.

1. Use whatever method you want to change four or five fields on the current screen. When the changes are complete, use the navigation skills learned in the last lesson to move to any other screen.
2. Now return to the Personal screen and note that the fields you had changed are still in the modified color and that they are still listed in the Edit History log. These changes have been recorded in the database when you changed

screens, but they can still be undone. The undo feature simply uses the “before” value in the Edit History log to restore the field contents. Try the Undo on one of the fields you have changed.

3. The Undo capability persists until you leave the current record. Whatever changes are visible in the Edit History Log can be undone using the Undo Field feature.
4. The Undo Screen is not as flexible. It can only undo changes that have been made on the current screen before the changes have been saved. The Undo Screen can undo all the changes at once, but it cannot recover saved changes.
5. The changes that you have made were saved when you left the screen and came back. These cannot be undone all at once. Try it using the Undo Screen option on the Edit Menu. What happens? Nothing.
6. Now make a few other changes. Then use the Undo Screen feature. What happens this time? All of the changes made since the screen was saved are undone.
7. Undo Screen is particularly useful on grids. At the current time, there is no way to undo a row delete. If you inadvertently delete a row when you meant to insert a row, the best way to recover is to undo the entire screen. This works great for the first mistake, but if you have already successfully entered rows and then make a mistake, you would lose the rows just entered if you undo the screen.
8. To see how the Undo Screen feature works on grids, select the Compensation Screen. Delete a few rows and then insert a few other blank rows. When you have the grid completely ruined, use the Undo Screen feature and see what happens. The grid is restored to its original state. Continue with the next tutorial.

Tutorial C.3

Deleting and Inserting Rows in a Grid

1. Select the Performance Reviews screen. Note that Donald has multiple performance review rows in the grid.
2. There is no limit to the number of performance review rows available, but only a portion of these can be seen at any one time. To view performance review rows are not in the viewable area, use either the DOWN ARROW key or the scroll bar on the right (Remember, the PAGE DOWN key will move to the next screen).
3. When rows in a grid are dated, it is strongly recommended that the rows be maintained in descending order. To do this you need to know how to insert rows.
4. Check the Tool Bar and note that Insert Row button in enabled. Click on the button. Note that all subsequent rows are pushed down and that the current record is cleared for a new entry. The Insert Record feature performs this task on nearly all grid screens (some do not

allow insert and delete). You can insert a row for a new first record, or you can insert a row at any other row. Try it now and do not worry about the blank rows. We'll learn how to delete rows next.

5. Position to the first blank row you inserted. Now press the Delete Row button on the Tool Bar. The row is deleted and all subsequent rows are scrolled up. Use the Delete Row button to delete any other rows you have entered. The Insert Row and Delete Row functions are also available as options on the Edit Menu.
6. The Insert Row and Delete Row functions are available at nearly all grids. In a few cases, rows are displayed and can be edited, but rows cannot be inserted or deleted. In those instances, the Insert Row and Delete Row buttons and menu options will be disabled.
7. This tutorial is complete. Leave the cursor on the Performance Reviews screen and continue with the next tutorial.

Tutorial C.4

Sorting Rows in a Grid

In the last tutorial, we mentioned that rows on grids can be entered in ascending, descending, or totally random order. This may occur intentionally or unintentionally. Fortunately, you can sort these rows. You'll learn how in this tutorial.

1. First, determine the order of the rows on the Performance Review screen by checking the Review Date field. The rows were originally recorded in descending order so that the most recent record is on top. Perhaps this is acceptable for your organization and perhaps it is not. Let's assume it is not.
2. Sorting is almost always applicable for grids (it is disabled in a few cases) and is easy to perform. To sort based on the Review Date, position the cursor to one of the fields in the Review Date column. Then click on the header for that column. The rows were listed in descending order; therefore, People-Trak has now switched them to ascending order. If you click on the header again, they will be resorted back in descending order. As many times as you click, People-Trak will reverse the sort order from Ascending to Descending.
3. It is essential that you position the cursor to a field in the column you wish to sort. If you just click on the header for another column in which the cursor is not located, the rows are not sorted. It may appear that sorting is disabled, but it is probably not.
4. To show that you can sort by any desired column, position the cursor to a field in the Rating column. Then sort on the Rating column by clicking on the header. Click again to resort in the opposite order. You can try this with as many columns as you wish.
5. When you sort rows on a grid, the sorting is persistent. This means that the rows are stored back into the database in the order in which you last sorted them. We'll show

this. Sort the performance reviews in some obvious order and then move to another screen. Remember, changes are saved when you leave the screen, including sorting. Now, return to the Performance Reviews screen. Note that the rows are retrieved and displayed in the order in which you last left them. Sort the rows again and leave the screen and come back. Note that the sort order persists.

6. People-Trak provides a capability to prevent specific users from sorting grids. This is something you may consider if rows are continually sorted in different orders because users are too casual with their sorting. You can check with your support representative to show you how to enable and disable grid sorting.
7. This tutorial and this lesson are now complete. Exit People-Trak using the techniques you have learned.

Notes

Lesson D

Field Types and Popups

This lesson introduces the field types used within People-Trak and demonstrates the conventions used with each type. In addition, this lesson describes the popup dialogs that are associated with the various field types.

Source Text

People-Trak Basics – Chapter 4

Tutorials

Data Entry at a Table Supported Field: demonstrates the use of the table popup and table validation rules. Includes keyboard equivalents and multi-field tables.

Using the Date Popup: describes the date popup and provides unique time saving ways to enter dates.

Data Entry at a Multi-line Field: shows how the multi-line popup is best keyed using the multi-line popup.

Tutorial D.1

Data Entry at a Table Supported Field

People-Trak utilizes optional table files. This means that many of the standard entries can be pulled from pre-defined tables. The advantage of using tables is that data entry can be standardized. When used correctly, there won't be a different version of an entry for every employee entered.

1. Start People-Trak, login, and select Donald Stern for processing. Position the cursor to the Personal screen.
2. To avoid the tremendous distraction of popup buttons all over the screen, People-Trak only displays the popup button when the cursor is actually positioned to a field supported by a popup. Use the TAB or ENTER key to move through each of the fields on the Personal screen. Note that both table and date popups appear in many places. If you see a popup button of some type, the field is supported by a popup.
3. Position the cursor to the City field. The City field is supported by the City table. The City table is normally a list of those tables in the general vicinity of your facility.
4. The simplest way to complete a field at a field supported by a table is to use the popup feature. Try it now, click on the button adjacent to the City field and select an entry from the table. Note that when the entry is returned from the table, the color is changed and the Undo button is enabled. Selecting an entry from a table is just like keying, only faster.
5. If you are accustomed to keying rapidly and do not like to leave the keyboard to use the mouse, any popup can be

activated using the F3 key. Try it now. The popup will be displayed just as if you clicked on the button.

6. You are not limited to using the popup on tables and certain other popup supported fields. You can key the value directly and validation against the table will be performed. Let's try this.
7. Enter the city name "Vista" and press the ENTER key. The value is validated against the entries in the table and is accepted. Now let's try something else. Enter the city "QQQQ" and press the ENTER key. This is a bogus city (as you might have expected) and one of the two messages shown below is displayed.

Table Entry Does Not Exist – Override Table Y/N
Table Entry Does Not Exist

8. The first message is displayed when the usage of the table has been defined as *optional*. When a table is optional, entries are validated against the table, but you have the option of entering a value that is not in the table. The second message is displayed when the usage of the table is *mandatory*. When a table is mandatory, the entry must match an entry in the table or the entry will be disallowed.
9. Enter "Y" or press the ENTER key to continue. The value will be accepted or rejected according to the validation rules for the table. A table such as the City table is normally set to optional because there are many city possibilities. Other tables such as departments or job codes would be set to mandatory because these tables would never be overridden.
10. There are dozens of tables just like the City table throughout People-Trak. The operating conventions are always the same.
11. Tables (and all popups) work on grid text boxes just like they do on regular text boxes. Let's try one.
12. Select the Compensation screen and position the cursor to the Change Reason field. This field is supported by the Change Reason table that provides a list of reasons why a salary change was made. Note that the table popup appears adjacent to the field for the current row only. You can select from the table by clicking the popup or by using Function Key 3. Try it now.
13. Because a table field is a table field is a table field, you can also key the field directly. The entry will be validated just as it was with the City field.
14. The City table and the Change Reason table are simple tables and support the entry of a single field. There are other more complex tables that support the entry of multiple fields. Let's see how one of these works.
15. To view/edit the Job Details information for the first compensation row, click on the black RIGHT ARROW located on the first row of the compensation grid. The Job Details popup is displayed.

16. Position the cursor to the Job Code field. Click on the popup button to activate the table and select the Sales Manager entry. Multiple fields from the table are then placed into the corresponding fields on the Job Details screen.
17. The color of all returned fields is changed and an entry is placed into the Edit History Log for each field. As far as People-Trak is concerned, all of the data entry performed from this table selection might just as well have been performed manually, field by field. If you move the cursor around on the returned fields, you will note that you can undo them individually and that you can override them with values that did not originate from the table. (If you change the Job Code field itself, you will be selecting another entry.)
18. If your organization elects not to use one or more of the tables, the key field works like any other field. It can accept any value that the length of the field allows. No special editing is performed, nor are any of the related fields displayed.
19. Continue with the next tutorial.

Tutorial D.2

Using the Date Popup

Date fields are used throughout People-Trak and date fields are notoriously difficult to enter. As you saw in the last lesson, the dashes or slashes are automatically inserted into dates as you key the digits to assist in the data entry and formatting process. However, dates still present a data entry dilemma for many users. Fortunately, People-Trak provides a date popup feature at all date fields to allow you to select dates graphically with the mouse.. Let's see how to use it.

1. Position the cursor to the Birth Date field on the Personal screen. Note that the date popup is displayed adjacent to the field. This same popup is displayed whenever the cursor is positioned to a date field on both regular text boxes and on grids.
2. As with all popups, you can activate the popup by clicking on the button or by using Function Key 3. Try Function Key 3 this time to activate the popup.
3. When the date popup is displayed, the settings for the month, day, and year are initialized according to the contents of the date field from which the popup was selected. If the date field contains a date, the values are initialized for that date. If the date field is blank, the values are initialized for the current date. Check this now. Close the date popup and manually change the Birth Date to a birth date you know, perhaps your own. Then, activate the popup and note the month, day, and year reflect that date.
4. The date popup is easy to use and is self-explanatory. However, there are few tips that might help you. Let's look at a few.

5. Often when keying dates, you wish to set the date forward one year or one month. The fastest way to achieve this is to trust the fact that the date popup is initialized to the current date. Position the cursor to the Next Review Date on the Performance Review Screen. Enter date one year ago today manually. Now let's assume that you wish to set the date one year forward... quickly. What would you do?
6. The fastest way to advance the current date one year requires three clicks of the mouse. 1. Click on the date popup. 2. Click on the right arrow button adjacent of the Year Dropdown. 3. Click on the OK button to close the date popup and to return the value to the Birth Date field. Try it. You do not even need to look at the month or day values. Just click, click, click.
7. You may think that keying the year is faster, but let's count the actions. 1. Click on the first digit of the year to locate the cursor. 2. Press the Back Space key twice to clear the current year. 3. Enter the new four-digit year. 4. Press the ENTER key to accept the entry. That's seven separate actions rather than three clicks.
8. Of course, the same technique works for advancing a date a single month. Just click the popup, click the right arrow adjacent to the Month Dropdown, and click OK to continue. You will learn your own tricks like this. The best way is to simply understand the date popup feature and to apply common sense.
9. Continue with the next tutorial.

Tutorial D.3

Data Entry at Multi-Line Field

There are times when a field must contain more text that can fit on a single line. This applies to comment fields, notes, short descriptions etc. Rather than have the field scroll to the right indefinitely and be impossible to read, People-Trak provides larger field areas to work with. These are known as multi-line text fields. Multi-line text fields present a dilemma in that you sometimes wish to format the field by using the ENTER key to create a new line. This is certainly acceptable, but normal operating conventions use the ENTER key to move to the next field. Thus, each time you might press the ENTER key at a multi-line field, the cursor would jump to the next field and you would get very frustrated.

If the ENTER key was trapped and was used to insert a new line directly in the field, this scenario would result. When you press the ENTER key five or six times to position to a field lower on the screen and you pass through a multi-line text field, the ENTER keys would be used to insert rows in the multi-line field and you would grow very frustrated deleting the line and then remembering not to use ENTER on that screen to move the cursor rapidly.

Fortunately, People-Trak has provided a popup for multi-line text fields. Here's how it works.

-
1. Position the cursor to the Medical/Wellness screen. Note that there are multi-line text fields on the screen. These are easily identified by the height of the field.
 2. Press the ENTER key a number of times to move the cursor all the way around the screen. Note that the ENTER key passes through the multi-line text field just like other text fields.
 3. Now position the cursor to the Restrictions field. Start typing a sentence and then press the ENTER key as if you wish to create a new line. Oops, the cursor just jumped to the next field. Now you have to position back to field and try again, but the results will be the same.
 4. Instead, click on the multi-line popup button. Now type your sentence and add lines and use the ENTER key as you please. Format the text the way you want. Now, close the popup and return the text to the underlying field.
 5. The text you have keyed should be echoed just as you keyed it in the popup. Now, press the ENTER key a bunch of times again. As with the last time, the ENTER keys will not be trapped by the multi-line text box and will not mess up your entry.
 6. Now, position the cursor back to the Restrictions field and try to edit the field directly. It does not work well. Try the popup button again. Now it will work very nicely.
 7. The multi-line popup dialog will actually adjust it's height to display the entire contents of the text box. Even if the entire contents are not visible in the space provided in the underlying field, the popup will show you all of the text if it can.
 8. This tutorial and this lesson are now complete. Exit People-Trak.

Notes

2

Data Entry

Lesson 1 – Using Help

- Tutorial 1.1 – Use F1 for Field Help
- Tutorial 1.2 – Using the Contents Tab
- Tutorial 1.3 – Using the Index Tab
- Tutorial 1.4 – Using the Find Tab

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Lesson 11 – Using a Workflow

- Tutorial 11.1 – Modify an Existing Record
- Tutorial 11.2 – Add a New Record

Notes

Lesson 1

Using Help

This lesson demonstrates how to select records for editing, how to navigate the records that are returned from the lookup process, and how to edit the group of records to reflect the specific group you wish to use.

Source Text

People-Trak Basics – Chapter 4

Tutorials

Tutorial 1.1 – Use F1 for Field Help
Tutorial 1.2 – Using the Contents Tab
Tutorial 1.3 – Using the Index Tab
Tutorial 1.4 – Using the Find Tab

Use F1 for Field Help: demonstrates how to select records using full and partial entries. Also shows how to manipulate the group of records returned from the lookup process.

Using the Contents Tab: shows how to navigate through the current record group using the Record Dropdown and the first, last, previous, and last record functions.

Using the Index Tab: demonstrates techniques for adjusting the group of records after the lookup has been performed. This is useful when group functions such as transfer and letter/label printing are to be performed and the group is not easily retrieved.

Using the Find Tab: demonstrates techniques for adjusting

Tutorial 1.1

Use F1 for Field Help

1. Start People-Trak and select the Personnel module.
2. Start the lookup process using the Open Employee button on the Tool Bar or the Open Employee option on the File Menu. The Lookup dialog is displayed.
3. Click on the Search button to display a list of employees and then select Donald Stern.
4. Function Key 1 can be used to display the field help for the current field. Position the cursor to the Last Name field and press the F1 key.
5. The Help dialog is opened and the cursor is moved to the appropriate portion of help document. The document displayed should be the field help for the Last Name field.
6. Close the Help dialog and move to the First Name field. Try the F1 key again. This time, the field help for the First Name should be displayed.
7. Close the Help dialog and close the record for Donald Stern. Continue with the next tutorial.

Tutorial 1.2

Using the Contents Tab

The Help menu provides three ways to access the help provided with People-Trak. Each of three ways displays the Help dialog, but it starts the dialog at different places within the help structure. Let's start with the Contents section.

1. Select the Contents option on the Help menu. The Help dialog is displayed and the cursor is positioned to the Contents tab.
2. The Contents tab presents the help organized into the documents, chapters, sections, and topics that comprise the documentation suite provided with People-Trak. If you know what you are looking for, the Contents tab is a good place to start. Let's try a few things now.
3. Locate the Personnel Management User Guide and open the document by clicking on the box adjacent to the document name.
4. Now open the chapter titled "Field Definitions by Field". This chapter provides a section for each of the standard data entry screens.
5. Open the section titled "Personal." This section lists each of the fields on the Personal screen.
6. Open the field help for the Last Name field. This is the same help that was displayed using the F1 key. We just used the long method to get here. The point being made is that all of the help is available. You can get to the field help with a single F1 key at the field, or you can navigate the entire documentation suite by opening the appropriate documents, chapters, sections, and topics.
7. Close the Help dialog and continue with the next tutorial

Tutorial 1.3

Using the Index Tab

1. Select the Index option on the Help menu. The Help dialog is displayed and the cursor is positioned to the Index tab.
2. The Index tab presents the help from the entire document suite in alphabetic order by topic. The topics include field help for fields, table descriptions, operating conventions, and everything else.
3. To continue with our theme, scroll the indexed list down until you find "Last Name". You will note that there are multiple entries for last name.
4. Click and display each Last Name entry. Note that one entry is the field help for the Personal screen in the Personnel Module that we have seen before. Another is for the field help for a batch processing program. And, another is the field help for the Personal screen in the Applicant Tracking module.
5. Close the Help dialog and continue with the next tutorial.

Tutorial 1.4

Using the Find Tab

1. Select the Search option on the Help menu. The Help dialog is displayed and the cursor is positioned to the Search tab.
2. The Search tab does not display anything until you have specified a phrase. Once you do specify a phrase, the tab will list those topics that contain the phrase you have entered.
3. Position the cursor to the “phrase to find” space at the top of the tab. Enter the phrase “last name” and then press the Search button.
4. All topics that contain the phrase “last name” are displayed. Again, you can navigate through this list to find the actual topic you wish to read about.
5. Close the Help dialog.
6. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 2

Record Selection and Navigation

This lesson demonstrates how to select records for editing, how to navigate the records that are returned from the lookup process, and how to edit the group of records to reflect the specific group you wish to use.

Source Text

People-Trak Basics – Chapter 5

Tutorials

Selecting Records by ID and Name: demonstrates how to select records using full and partial entries. Also shows how to manipulate the group of records returned from the lookup process.

Navigating Records: shows how to navigate through the current record group using the Record Dropdown and the first, last, previous, and last record functions.

Edit a Record Group: demonstrates techniques for adjusting the group of records after the lookup has been performed. This is useful when group functions such as transfer and letter/label printing are to be performed and the group is not easily retrieved.

Tutorial 2.1

Selecting Records by ID and Name

We have used the Lookup feature in prior lessons to select Donald Stern to demonstrate other features in People-Trak. However, we performed the Lookup in the simplest manner and did not take advantage of a wide range of features. Let's start using this feature more effectively now.

1. Start People-Trak and select the Personnel module.
2. Start the lookup process using the Open Employee button on the Tool Bar or the Open Employee option on the File Menu. The Lookup dialog is displayed as before, but now we are ready to make it work for us.
3. The Lookup dialog provides four individual tabs for selecting records. The focus of this lesson will be the first tab: "ID and Name". You will learn more about the other tabs later.
4. The "ID and Name" tab first provides up to four separate fields that can be used to look up records. The actual fields can be defined by your organization. It is normally assumed that one of these fields is the ID (employee, application, position, etc.) and one is the Name (employee or applicant last name, description, title, etc.). When the Lookup dialog is displayed, the cursor is always positioned to the first field which we will assume is the

Employee ID field in the Personnel module. We will now attempt to select one of the existing demonstration employees for processing. The employee ID for one of the employees is "1060". Enter that ID now and press the ENTER key. The message shown below is displayed. Why?

Matching Record Not Found or In Use by Another User

5. The reason for this error is that you entered an incorrect employee ID, but it is not your fault. You were given an incorrect employee ID to demonstrate an important point. When selecting an existing employee, the employee ID entered must match an existing employee ID. If it does not, the program cannot retrieve the desired employee and the message shown above is displayed. When you see this message in the future, do not fear that the desired employee has disappeared. In most cases, the message appears because the ID has not been entered correctly.
6. Press the ENTER key to clear the message. Now try the employee ID "1006". The Personal Screen for Donald Stern is displayed. You did not see a list of employees as you have in the past because you entered a direct match. There is only one record with the ID "1006". You gave People-Trak enough information to save you further effort.
7. You can provide sufficient information for a direct match at any of the fields shown on the "ID and Name". If you provide a unique last name, that record will be fetched. If you provide a name that is not unique, you will see a list of employees that share that name and you can select the particular record that you want.
8. Now let's learn how to use the "partial entry" method. First, we need to clear the record we have selected. You can do this using the Close button on the Tool Bar or the Close option on the File Menu. Optionally, and to save a little work, you can directly select the Open Employee button. The Close operation is assumed and you will proceed directly to the Lookup dialog. If you had changes in process, they were saved. You can try it yourself if you do not trust me.
9. To continue, at the Employee ID field, enter the single digit "1" and press the ENTER key. A list of those employees with ID numbers starting with "1" is displayed. You can select the desired employee in three ways. You can double-click on the desired employee, you can position the highlight over the desired employee and press the ENTER key, or you can position the highlight over the desired employee and select the OK button. Finally, if you wish abandon the selection process, you can select the Cancel button.
10. Let's select Donald Stern using the double-click method. The information for Donald Stern is displayed just as it was before. Now let's learn how to show a list of all employees in the database.

11. Clear the information for Donald Stern and move directly to the Lookup dialog using the Open Employee button. This time, perform a partial lookup using “S” in the Last Name field. You will see a list of those employees who have a last name starting with “S”. Do not select an employee this time. Instead, use the Clear button to clear the entries so that we can try something else.
12. Use the Search button to select all employees. When the list is displayed, note that the headings for the list are the same fields listed for selection. As mentioned before, up to four fields can be used to both allow flexible lookup and to allow you to identify the appropriate records. If you happen to have dozens of employees named Smith and you cannot remember hundreds of individual employee ID numbers, the fields in the list assist you to determine just what Smith you wish to select.
13. The list of records can also be sorted. To sort the list, click on the column header for the appropriate field. Try it. Sort the list by Last Name and then by each of the other fields. This feature can assist you in selection and in record navigation which we will discuss next
14. Continue with the next tutorial.

Tutorial 2.2

Navigating Records

When you select a record from a list, the record selected becomes the current record displayed, but in fact, the entire list of records is returned as a group that you can work with. That is why features are provided to allow you to manipulate the list before selecting the specific record. The group of records that meet your selection criteria is added to the Records Dropdown on the Navigation Bar. This tutorial will show you how to navigate the list.

1. Use the Lookup dialog to create a list of all employees from the DEMO company. Before selecting a record, sort the list in ascending (A to Z) order by last name. Then select Donald Stern.
2. Now lets evaluate what we have. The name displayed in the Record Dropdown should be Donald Stern, but there are other records in the dropdown. This is clearly indicated by the record counter that shows that Donald is the 23rd record in a list of 30. Let’s check this. Click on the dropdown and scroll through the list of names. Select Michael Durkin and see what happens. The current record changes to Michael Durkin and the record counter changes to reflect the Michael’s position in the list.
3. Use this technique to return to Donald Stern. The Record Dropdown can be used to select any record that has been returned from the lookup process. The records are ordered in the dropdown according the manner in which they were sorted in the Lookup. You will recall that we sorted by ascending by last name. If we had sorted by ID, the dropdown list would be ordered by ID and Donald would not be 23 of 30. He would be 2 of 30 because his ID is the second lowest.

4. While the Record Dropdown is used to select a specific record by name, the four buttons adjacent to the Record Dropdown are used to move through the list incrementally. The leftmost button is the “First Record” button. It will select the first record in the list as the current record. Try it now. If your dropdown is still sorted by last name, the current record will become “Frank Adams” and the record counter will indicate “1 of 30”. The rightmost button is the “Last Record” button. It will select the last record in the list as the current record. Try it now. The current record should become “Cary Wilson” and the counter will indicate “30 of 30”.
5. The inner buttons are used to select the previous and next records in the list. Try these and see how they work. If you locate to the last record and then select the next record, you will be cycled around to the first record. If you locate to the first record and then select the prior record, you will be cycled around to the last record.
6. Record navigation is frequently used in a process known as “browsing”. From time to time, you may find the need to browse through a group of records checking a specific field or making relative comparisons. Browsing is an easy way to do that. Select the first record in the current list with the First Record button. Now change the screen to the Compensation screen. Let’s assume that you wish to “browse” salary history for this group. Review the first record and then click on the next record. Review the second record and then the third. Continue browsing until you have seen what you wanted to see or you have returned to record 1. You can use this technique for any primary data entry screen or for any other related purpose.
7. Continue with the next tutorial.

Tutorial 2.3

Edit a Record Group

The group of records returned from the lookup process can be acted upon as a group. You can transfer records and print labels and letters for members of the group. Sometimes, however, the group contains one or more records that you do not want and the exact group is not easily retrieved. You can adjust the group to include the members you want using the Edit Lookup features. Here’s how.

1. Use the Lookup dialog to select a list of all employees. Order the list by ID in ascending (0 to 9) order and click the OK button. Now let’s assume that we wish to print labels for this list, but that three of the employees are terminated and you do not need labels for them.
2. Select the Edit Lookup option from the File Menu. The Edit Lookup dialog provides a list of the current members in the order in which they are listed in the Record Dropdown. Let’s exclude the three members who are not to receive labels.
3. Locate Donald Stern and check the box adjacent to his name. Do the same for Michael Durkin, and Penny Armstrong. Press the Exclude button. What happens?

The list is reduced from 30 members to 27 members and Donald, Michael, and Penny have been deleted.

4. Close the Edit Lookup dialog and watch what happens. The record counter is reduced from 30 to 27 and the actual members in Record Dropdown are changed to reflect the exclusions. Your new group is now 27 members strong and works exactly as if you had selected the 27 in initial lookup. If you realize that you needed to exclude further members, simply use the Edit Lookup dialog to exclude them.
5. Once you have adjusted your list of employees to the precise list you desire, you can perform the group related function you wish to perform. Only the current members of the group will be affected.
6. Let's try one more thing. Select the Edit Lookup option from the File Menu again. This time, select any five employees, but be sure to exclude the employee currently listed in the Record Dropdown. Instead of selecting the Exclude button, select the Include button. The list is adjusted to include only those five employees.
7. Close the Edit Lookup dialog and see what happens this time. Of course, the list is adjusted and the record count is modified, but what happens to the current record that is no longer in the list? You can check this yourself, but what happens is that the next available member of the list is selected for you. If you were on the last member of the list, the first member will be selected.
8. Close your record group and exit People-Trak. This tutorial and this lesson are complete.

Notes

Lesson 3

Add, Delete, Copy, Transfer

This lesson describes how to add, delete, copy, and transfer records. A detailed description of the auto-numbering feature is also provided.

Source Text

People-Trak Basics – Chapter 5

Tutorials

Add a Record: shows how to add a new record and to supply a unique ID.

Transfer a Record: demonstrates two different techniques for transferring a record from one company to another.

Delete a Record: shows two methods used to delete records.

Print Labels for a Group: shows how to select and edit a record group and to print labels for all members of the group.

Tutorial 3.1

Add a Record

In the last lesson, we learned how to select an existing employee for processing. When an employee is added, there is no existing employee to select. It is necessary to add all employee information from scratch. The first step in adding an employee is getting a blank record and establishing an employee number.

1. Start People-Trak and select the Personnel Management option. There are two ways to start a new. You can use the New Employee button on the Tool Bar or the New Employee option on the File Menu. Use the button this time.
2. If you own the Applicant Tracking module, you may see a dialog that is used to select applicants as new employees. This is a feature within People-Trak for customers who primarily hire employees who have been tracked as applicants. If a screen is displayed at this time, use the Cancel button to cancel the screen and continue with step 3.
3. When the Personal screen is displayed, the cursor is positioned to the Employee ID field. Enter the employee number "1006". The message shown below is displayed.

Employee Number already Used

4. The reason for this error is that we directed you to enter an existing employee number. As you can see from this example, when specifying a new employee number, the number entered must not match an existing number. A new ID must be unique. That is one reason why some companies use the auto-numbering feature.

5. Press the ENTER key to clear the message. Now enter an available employee number such as 1116. This value will be accepted. Enter a few other fields and note that the fields are shown in the modified color. If you return to one of the fields, you will see that the field can be undone (except the ID field for technical reasons) just as if an existing record were being modified. This is because an existing, albeit blank record, is being modified. You are changing blank data to new data. If you undo new data, the field will return to its original blank status.
6. Use the Close Record button on the Tool Bar to close the record. It is now saved and has become part of your DEMO company. Do not worry, we will delete the record in a subsequent tutorial.
7. Now, start a new record using the New Employee option on the Tool Bar. This time do not add an ID, but start filling out other fields. After a few fields, try to close the record. The message show below is displayed.

This record cannot be saved...

8. The message is letting you know that you cannot save a record without providing a unique ID. If you provide an ID as in the prior steps and close the record, you will get another unwanted record. What do you do? As stated before, this record is really a blank record that already exists. You can thus delete the record to get rid of it without having to close it first. Use the Delete Employee option on the File Menu. The message shown below is displayed.
9. This message is provided to make certain that the record currently displayed is absolutely, positively the record you wish to delete because the record will be deleted permanently. Click on the OK button to discard the record.

Delete this Record?

10. Continue with the next tutorial.

Tutorial 3.2

Transfer a Record

People-Trak is a multi-company product. This means that you can track employee and applicant records in multiple separate companies. For most organizations, there will be an active company that contains active records and an archive company that contains obsolete or non-active records. This tutorial will show you how to transfer records between companies.

1. There are two ways to transfer an employee. You can select the employee and then transfer or you can select transfer and then pick the employee. We'll try both.
2. Select the record that you created in the last tutorial. The ID was 1116.
3. Select the Transfer option on the File Menu. A dialog box containing three option buttons is displayed. The first button is used to transfer the current employee, the second

button is used to transfer all of the records in the group, and the third button is used to cancel the transfer process. Select the “current employee” option.

4. A list of the companies to which you have access is displayed. (The current database is not included). Select the ARCHIVE company. The record is immediately transferred and after a few seconds, the process is completed. The transfer process is a move and not a copy. Thus, the record in the DEMO company has been deleted and now exist only in the ARCHIVE company. Let’s prove it.
5. Try to lookup record 1116. You will not be able to do so. Now change the current company from DEMO to ARCHIVE using one of the methods you have learned earlier. Now try to lookup record 1116. The record you transferred will be found. Close the record.
6. As mentioned earlier, there are two ways to transfer a record. We tried one to send the record from DEMO to ARCHIVE. Let’s learn another as we transfer the record back to DEMO from ARCHIVE.
7. Select the Transfer option from the File Menu. The Lookup dialog is automatically displayed because no record has been selected. Use the Lookup dialog to select record 1116. The list of companies is displayed. Note that DEMO is shown and that ARCHIVE is not because you cannot transfer a record within the same company. Select the DEMO company and transfer the record back. The record is now in DEMO again and deleted from ARCHIVE. Return to the DEMO company.
8. When a record transfers, everything in the record transfers. If there are dozens of performance review, compensation history, benefits enrollments, it all transfers.
9. Return to the DEMO company and continue with the next tutorial.

Tutorial 3.3

Delete a Record

In actuality, it is rare to delete any type of record. To completely discard information that has been painstakingly entered is odd. Normally, information is transferred to some type of archive and left there for a long time, just in case it is needed. However, if a record really does need to be deleted, this is how you can do it.

1. Select the employee we added earlier. The ID is 1116.
2. Select the Delete Employee option from the File Menu. The message shown below is displayed.

Delete this Record?

3. Go ahead and delete the record. If you ever reach this message and do not wish to delete the employee displayed, select the CANCEL button to abandon the deletion process.

4. For your protection, there is no obvious way to delete records in groups. The feature would be too dangerous. If you ever need to delete a large number of records, you should consult with your support representative.
5. Continue with the next tutorial.

Tutorial 3.4

Print Labels for a Group

People-Trak provides a number of labels and letters. In addition, you can create additional labels and letters using the Template Manager. Each of the employee labels/letters can be printed with the Document Explorer option, but they can also be printed for any single employee or for a group of employees during an editing session. Here's how.

1. You learned how to select and edit a group of records in the previous lesson. Use your skills to select a group now. If you wish, use the Edit Lookup option to customize the group to contain exactly those members for whom you wish to print a label.
2. When your list is ready, select the Labels option from the File Menu. A list of the available label templates is displayed. Pick a label such as the Avery 5160.
3. A dialog box containing three option buttons is displayed. The first button is used to select the current employee, the second button is used to select the current group, and the third button is used to cancel the whole process. Select the “current group” option.
4. The list of employees is processed and after a brief delay, the Document Viewer will be displayed with your labels. There should be one label for each employee in the list. Use the Exit option on the File Menu to close the Document Viewer. Then close the current record.
5. The ability to perform group functions is limited to transferring records, printing labels and letters, and sending email. The process is the same. Once you have a group identified, you can select the appropriate option from the File Menu. From there, you will be prompted to perform the function for the current record or for the entire group. As mentioned earlier, we did not provide the ability delete records in a group for obvious reasons.
6. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 4

Notes and Attachments

This lesson provides detailed instructions for using the notes and attachment features provided with People-Trak.

Source Text

People-Trak Basics – Chapter 6

Tutorials

Adding and Deleting Notes: shows how to add and delete notes. This includes the special techniques for opening the note text area and the automatic assignment of the note category and User ID.

Working with Categories: demonstrates how the note categories are used to organize notes based on the primary data entry screens.

Attaching a File: shows how to create and attach a file to a note.

Activating an Attachment: demonstrates how to activate an attachment file using the tool that was used to create the attachments.

Tutorial 4.1

Adding and Deleting Notes

The Notes dialog is essentially a grid with some additional enhancements to support attachments and a large multi-line text box. In this lesson, we'll see how these enhancements work.

1. Start People-Trak, select the Personnel Module, and select Donald Stern. Verify that the Personal screen is displayed.
2. The Notes dialog is available from virtually all of the primary data entry screens in People-Trak as a sub-screen. There is a Notes sub-screen button as the last or next to last button in the stack. Confirm this now by selecting a few screens and finding the Notes button.
3. Return to the Personal screen and select the Notes sub-screen. The Notes dialog is displayed. As indicated, the primary component on the dialog is a grid, but this grid has some special features.
4. The record for Donald Stern already has four notes defined for the Personal category. Let's add another. You can add a note on the first row or on any other row. Let's add a note at the first blank row. The first three columns in the grid are display-only. Position the cursor to the Note Date column and enter today's date manually, using the Date popup, or the Date Stamp feature.
5. When you leave the field, the category and demo columns are automatically populated with the current category "Personal" and the current user ID "DEMO". These

values are constant and cannot be changed. The note was created on the date specified, by the current user, in the current category. If these facts change, the note is invalidated and should be deleted.

6. Position the cursor to the first row and use the Insert Row feature to insert a row. Note that the category and user ID fields are completed just as before. Enter a date for the note and now let's enter the note text. There are two methods. If you wish to enter a relatively short note without using the ENTER key, you can enter the note directly into the field provided. When you press the ENTER key, the note will be completed and the cursor will move to the next field. Try that. Enter the phrase "this is my note" and press the ENTER key. The note is complete.
7. If you wish to add a longer note with more than one line, you need to use the multi-line popup. This is activated using the popup button adjacent to the Note Text column.
8. Position the cursor to the Note Text column for the note on the last row. Click on the button to open the multi-line editor. The field size will be immediately increased to match the height of the grid. You can now type away for as long as you like. If you reach the end of the line, word-wrap will be performed and the cursor will jump to the next line. If you press the ENTER key, the current line will be broken and the cursor will jump to a new line. Try these now. Type a sentence or paragraph that wraps. Then on the second line, press the ENTER key to start another new line. Add a few more lines with the ENTER key and make a nice long note.
9. When you are finished with your note click on the button again to close the editor. Only the first line of your note is displayed in the grid. If you wish to review the text of your note or to add more text, click on the popup button to expand the note text area and view or edit the text.
10. The notes dialog has been designed to allow you to rapidly view the first line of each note relative to the other notes. If you wish to review the note in more detail (if the note has more detail), you need only click on the popup button. In fact, you can actually browse your notes with the mouse. Try this. Position to the first row. Expand the note text, read the note text, reduce the note text. Click on the next line. Expand the note text, read the note text, reduce the note text. Click on the next line. Expand the note text, read the note text, reduce the note text. You can use this technique to rapidly browse all notes for any record.
11. Now that we know how to add notes, let's see how to delete notes. There is nothing special, just use the Delete Row button on the Tool Bar. Use it now to delete the two notes that we just entered.
12. Continue with the next tutorial.

Tutorial 4.2

Working with Note Categories

1. When we entered the notes in the last tutorial, the category was automatically set to "Personal". Because each primary data entry screen has a notes sub-screen, the category for the note is set to the name of the primary data entry screen.
2. Select the Notes sub-screen from the Status screen. Unlike the Personal screen there are no "status" notes for Donald Stern. Enter a note using the techniques you just learned. Note that the category assigned is "Status".
3. Close the Notes dialog on the Status screen and open the Notes dialog on the Personal screen. Use the Category Dropdown to change the current category to "Status". The personal notes are cleared and the status note you just entered is displayed. Try a few other categories. Some may contain notes and others may not.
4. If you wish to see all of the notes, use the "All" category listed at the top of the Category Dropdown. Try it. All of the notes for Donald Stern are displayed. This ability to change categories and display notes from other categories is available on the Notes dialog regardless of where the dialog was selected.
5. The grid used for notes shares the standard operating conventions with other grids in People-Trak. This means that you can sort the grid using any of the column headers. Verify that you have displayed all of the notes. Then use the grid sort feature to sort the notes by different columns.
6. The ability to display all notes and to sort them by category is especially useful when printing notes. Use the Print button on the Tool Bar to print the notes now. The notes will be printed in the order in which they are currently displayed. In addition, the note text is expanded vertically so that the report shows the entire text of each note.
7. When you have the Notes dialog displayed from a specific data entry screen and you add a note, the note category becomes the note for that screen, not necessarily for the screen listed in the Category Dropdown.
8. Change the note category to Status. This is not the current screen. Add a note. The category created for the note will be the "status" category because this is the value in the dropdown at the time the note was created.
9. Continue with the next tutorial.

Tutorial 4.3

Attaching a File

One of the more powerful features of the Notes dialog is the ability to attach external files to your notes. These external files become an integral part of the record. Attachments can be added to any existing note. You cannot add an attachment to nothing. Thus, you may need to add a note when you wish to add an attachment.

1. At the end of the last tutorial, we added a note to the Personal screen. We'll add an attachment to that note. Verify that you are positioned to that note.
2. Minimize People-Trak and use your word processor to create a small file containing any desired text. Save the file in a folder where you can find it quickly. Maximize People-Trak and continue.
3. Select the Attach File option from the Attachments menu. This option displays the File popup that is used to select a file. Locate the file you created with your word processor and select that file.
4. Internal processing for the attachment is performed. A copy of the file is first made. This copy is compressed using ZIP technology and finally moved into the attachment file for the current record. The attachment icon is then added to the first column for this note.
5. Normally, you would now add note text that would identify the file that has been attached so that you do not always need to activate the attachment to know what it contains.
6. Continue with the next tutorial.

Tutorial 4.4

Activating an Attachment

Once a file has been attached, the file can be activated or opened for viewing at any time. As long as the note row is displayed, you can activate the attachment associated with that note.

1. Verify that the cursor is positioned to the note row containing the file you attached in the last tutorial.
2. Click on the attachment icon in the first column. The word processor used to create the attachment is started and the file is loaded into the word processor. The file that has been loaded into the word processor is a copy of the attachment and not the attachment directly. If you modify the loaded file and save it, it will not be written back as an attachment automatically. There are very specific Windows related reasons for this.
3. If you would like to modify a loaded file and have it replace the prior attachment, you must save the file. Then you must delete the current attachment and attach the new file.

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4. To continue, close the word processor without saving. Position to one of the other rows that has an attachment icon. These other rows for Donald Stern have image attachments. Click on the icon. Some type of image editor or viewer will be loaded and you will see the attachments. Try a couple of these images.
 5. You can attach all types of files except for those that are or would execute programs. Please note, however, that if you attach a file from a tool that you use, another user can only activate that attachment if the user also has that tool. For example, if you attach a word processing file (as we just did) from your word processor and another user has a different word processor, the other user will not be able to view the attachment. The attachments feature is a very powerful feature, but it must be used with appropriate discretion. If your organization has standardized on word processors, spreadsheets, and other tools, there will be no problem.
 6. This tutorial and this lesson are complete. Exit the Notes dialog and then exit People-Trak.

Notes

Lesson 5

Tables

Source Text

People-Trak Basics – Chapter 7

Tutorials

Edit a Simple Table: shows how to edit a simple table using standard grid conventions.

Reverse Populate a Table: demonstrates a powerful method of populating a table with the existing unique values in the records.

Print a Table: shows how to print a table two different ways: while editing the table and using the Print Tables option.

Working with a Very Complex Table: shows the techniques required to add and delete records in a very complex table.

Tutorial 5.1

Edit a Simple Table

People-Trak provides a wide range of tables for tracking commonly used information. As you have seen in prior lessons, the tables are used to provide this information to records in a standard and consistent manner. All of the operating conventions used for tables you have seen before. This tutorial will be a quick refresher.

1. Start People-Trak, select the Personnel Module, select the Tables menu, and select the Table Edit option.
2. A list of the tables is presented in alphabetic order. Select the City table.
3. The City table is a typical single field table. The City table uses standard grid conventions. For example, you can insert rows, delete rows and sort rows. Try each of these options now. Note that the sort function within tables assumes ascending order.
4. Position to the first blank record and make an entry. All of the field edit conventions are identical to those you have seen before. Try a few such as cut, copy, and paste.
5. Exit the table using the Exit option on the File Menu. The list of tables is displayed. Select the Department Table.
6. This Department Table functions identically to the City table except that there are multiple fields in each row. Exit this table.
7. If you need to, study other tables. After a few tables, it should become apparent that a table is a table is a table.
8. Continue with the next tutorial.

Tutorial 5.2

Reverse Populate a Table

Normally, you create tables by entering the values directly into the table. In other instances, the table may have been imported from another source. There is a third way to populate a table. This is normally useful when a table is activated after data entry has been performed, or when records have been imported and you wish to build your table from the data already present in the records. Here is how you do it.

1. Select the City table.
2. Use the Delete Row button on the Tool Bar to delete all of the existing rows.
3. Select the Populate option on the File Menu. The message shown below is displayed.

Populate table with unique entries from all related fields for this company?

4. Select “Yes” to populate the table. The table is then populated with every unique city name from any city field used in the company. This means that if different cities were used for applicants and dependents and employees within the records, this table will include each of the unique entries. There will be no duplicates.
5. When we set this table up, we cleared the table prior to populating. This is not necessary, but was used for demonstration purposes. If there are unique entries in the table when the populate option is selected, the unique entries will remain. Let’s try.
6. Clear the table again. Then add three unique city names such as “XXX”, “YYY”, and “ZZZ”. Save the table and then reselect the City table. Now run the populate function. Note that the new values from the existing records are added to the unique records in the table and that all of the records are sorted in ascending order. Our “XYZ” cities will be at the bottom.
7. The populate feature should be used carefully as it can lead to bad data entry habits. Do not run this feature regularly on the same table so that the table will match the fields in the records. That is exactly the opposite of what you want. Your tables are used to ensure proper validation of the data that is entered into the records.
8. This feature is only available on the simple tables. You cannot populate complex or very complex tables in this manner.
9. Continue with the next tutorial.

Tutorial 5.3

Print a Table

1. There are two ways to print tables. You can print the table while you are editing it or you can print the table using the Print Table option on the Tables Menu. We'll do both.
2. We ended the last tutorial in the City table. Print the City table using the Print button on the Tool Bar. Note that the table reflects the current entries in the table.
3. Now let's print the table the other way. Close the City table and close the list of tables.
4. Select the Print Tables option from the Tables Menu. The list of tables is shown.
5. Select the City table. The table is printed directly from the menu and should appear exactly as the table printed from within the editing dialog. Close the Document Viewer and the Print Tables dialog.
6. Continue with the next tutorial.

Tutorial 5.4

Working with a Very Complex Table

Some tables have a lot of fields and cannot be maintained with a single grid. In some cases, a table is actually composed of multiple parts: a main record and a series of detail records. These very complex tables are unique, but share a common set of operating conventions.

1. Select the Edit Tables option from the Tables Menu and select the Location table. The Location table is one of the "simpler" complex tables and is a good table to demonstrate.
2. All of the very complex tables provide a list box that contains the existing table codes and either one or more tabs to maintain the information. The Location table has just one tab.
3. The list box is used to select one of the codes for editing. When the dialog is first displayed, the first code is automatically selected for you. Select a different code and note that the fields are refreshed for that code. Change one of the values for the code you have selected and then select another code. The change you made is saved when you moved to the other code just like changes are saved on the primary data entry screens when you move between the screens.
4. When there are multiple tabs of information, the list box is displayed on each tab so that you can see which code is being edited. You can move between the tabs changing any of the information associated with the code. The changes are saved when you change to another code or exit the table.

5. With complex tables you cannot insert a row when you wish to create a new entry because there is no grid. Instead, there is a New Record button on the Tool Bar and a New Record option on the File Menu. When the New Record feature is used, a blank record is added to the table and is given a temporary code such as NEW1, NEW2, etc.
6. Add a new location code now by using the New Record button. The location code NEW1 is added to the list box and is placed into the Location Code field. Normally, you would continue adding the information for this location by changing the code to a valid name and by completing the remaining fields as necessary. At this point, the new record has been added; you are actually editing a blank record.
7. That's how new records are added. Now let's learn how to delete one. To delete a record, select the record to delete using the list box. Then use the Delete Record button on the Tool Bar or the Delete Record option on the File Menu to delete the new record that we created. Note that the next record in the list box is automatically selected.
8. Some of the other complex tables are more complex in that they have more tabs and even sub-screens and buttons. However, the operating conventions match those used elsewhere. You need only apply the knowledge you have already acquired.

Lesson 6

Working with Documents

This lesson shows how to use the Document Explorer. The Document Explorer organizes all of your documents into categories in the same way that the Windows Explorer organizes file into folders.

Source Text

People-Trak Basics – Chapter 8

Tutorials

Retrieve and Print a Document: shows two methods for retrieving and printing documents.

Create a Document: demonstrates how to start the creation of a document using the Document Explorer. The document is completed using the appropriate document editor.

Delete a Document: shows how to delete any obsolete document.

Copy a Document: shows how to make a copy of a document.

Working with Categories: shows how to change categories for a single document and for all documents. It also shows how to merge the documents from one category into another.

Tutorial 6.1

Retrieve and Print a Document

People-Trak provides a large number of pre-defined reports that you can use. In this tutorial, you will learn how to select and print a document.

1. Start People-Trak, select the Personnel Module, and select the Document Explorer option on the Documents Menu. The Document Explorer dialog is displayed.
2. The Document Explorer organizes all of your documents in much the same way that the Windows Explorer organizes files and folders. Initially, all of the existing documents are organized by category. Document categories are assigned when a document is created and can be changed if necessary. We'll use the categories to help us find a report.
3. Select the Compensation category to display a list of the compensation documents. Locate and highlight the Salary History document in that list. At this point, you can open the document to run it or you can run it directly from the explorer. As usual, we will try both.
4. Use the Open Document button on the Tool Bar or the Open Document option on the File Menu to open the Salary History document. The document will be opened and the Adhoc Report dialog is displayed. This dialog is used to create, edit, and run documents. We do not need to change the document, so run the document using the

Run button on the Tool Bar. The document will be displayed in the Document Viewer.

5. Close the Document Viewer and close the Adhoc Report dialog. Select the Compensation category again and highlight the Salary History document. This time, run the document directly from the Document Explorer using the Run button on the Tool Bar. The document will be sent to the Document Explorer as before. Close the Document Viewer.
6. Select the General category and run the Employee List by Department report. As you can see, to run existing reports, you need only point and click.
7. The Document Explorer can also present the reports by type rather than category. Above the list of categories is a dropdown with the phrase "Select by Category" displayed. Use the dropdown to change the phrase to "Select by Type". All of your documents are now organized by category within type rather than type within category.
8. Select the Letter type and you will see a list of the letter documents that have been created. Select the Physical Letter and run it. A physical letter for each record in the company will be generated and sent to the Document Viewer.
9. Close the Document Viewer and select the Standard Reports type. Select the Workforce Distribution by Ethnicity Report and run it. This report is a colorful graph that illustrates the number of employees within each ethnic category. Close the Document Viewer.
10. There are many, many documents that you can run. Some may be helpful and some may not. Using the navigation features you have learned, you can at least find these documents and test print them to see if they will be useful.
11. Continue with the next tutorial.

Tutorial 6.2

Create a Document

The Document Explorer is the starting point for creating new documents. Fully creating new documents is the subject of multiple future lessons. In this tutorial, we will show you how to get started.

1. Start a new document using the New Document button on the Tool Bar or the New Document option on the File Menu. The Select Document Type dialog is displayed. There is a unique editing dialog for each document type. This "select" dialog is used to determine which of the editing dialogs to use.
2. Select the Letter document type. The Letter dialog is displayed.
3. The Letter dialog is used to specify the document title, category, letter template, sort order, and query equations for the letter. Completing all of these fields is outside the

scope of this lesson. We will complete just enough fields to continue.

4. Set the title of the letter to "My Letter". Set the category to "My Category". Use the popup to select the Physical Letter as the Letter Name.
5. Run the letter to show that you have created a valid letter document. Close the Letter dialog and save the letter.
6. When the Document Explorer is displayed, there should be a new category "My Category". Select that category. There should be one document in that category, a letter named "My Letter". Run the letter document directly from the Document Explorer. The letters will be generated as before. Once created, a new letter document is just like any other document.
7. Continue with the next tutorial.

Tutorial 6.3

Delete a Document

This objective demonstrates a simple function that you probably won't need for some time. However, after an extended period of time when you have created dozens and dozens of documents, you may decide to delete some. To show you how to do this, we are going to delete the letter document created in the last tutorial.

1. Select the "My Category" category. Select and highlight the "My Letter" document.
2. Use the Delete Document button on the Tool Bar or the Delete Document option on the File Menu to delete the document. The message shown below is displayed.
Delete the Document: My Letter?
3. Select the Yes button to delete the document. Because there was just one document in the category, the category is also deleted. This only happens when the last document in a category is deleted.
4. Continue with the next tutorial.

Tutorial 6.4

Copy a Document

There are times when it is useful to make a copy of an existing document. For example, if you have a document that you wish to use as a model for a similar document, you can copy the document and then modify the copy. In addition, if you wish to make a document common, but keep a copy of your own, you can copy the document and make the copy common. Use the following procedure to copy a document.

1. Highlight the EEO-1 document in the EEO category.
2. Use the Copy button on the Tool Bar or the Copy option on the Edit Menu to place a copy of the document in memory. You will not see anything happen when you do this.

3. Use the Paste button on the Tool Bar or the Paste option on the Edit Menu to place a copy of the document into the same category. The new document will be named the following.

Copy of EEO-1

4. This copy of the EEO-1 document is completely distinct and can be modified or deleted without affecting the original document. To prove this, delete this document using what you learned in the last tutorial.
5. Continue with the next tutorial.

Tutorial 6.5

Working with Categories

1. Categories are normally assigned when a document is created. To change a category after a document has been created, select the document for editing, change the category field, and then save the document. Try it now.
2. Select the Home Phone List document from the General category. Change the category to "Education". When you close the Adhoc Report dialog the Home Phone List document will have been moved from the General category to the Education category.
3. You can change the category to an entirely new category if you wish. Try that now. Select the Home Phone List document from the Education category. Change the category to "My Category". When you close the Adhoc Report dialog, the new category will be created and the Home Phone List will be placed in it.
4. You can change the category for all documents in a category using the Document Explorer. Here's how. Position the cursor to the General category to select the category. Then click on the category again and hold the mouse down for a second or two. When you release the mouse button, the category will become editable. Change the category to "New Category". The change will take place immediately and all related documents are permanently changed. There is no General category any longer.
5. You can merge one category with another category as well. Try this technique. Change the Headcount category to "New Category" using what you just learned. Because the category already exists, the message shown below is displayed.
This category has already been used. Do you wish to combine categories?
6. Normally, you would select the Yes button to merge the categories and the categories would be merged. However, we need to use this category later. Trust me, it works..
7. This tutorial and this lesson are now complete. Exit the Document Explorer and exit People-Trak.

Lesson 7

Using the Document Viewer

All documents produced with People-Trak are sent to the Document Viewer. The Document Viewer is used to preview documents and to output documents not only to the printer, but also to a variety of other sources.

Some of the features in the Document Viewer will only work if you have the appropriate product installed. For example, columnar style reports can be exported directly into Microsoft Excel (or to a similar product associated with the XLS extension). If you do not have Excel or an equivalent product installed, this feature will not work.

Source Text

People-Trak Basics – Chapter 9

Tutorials

Navigating a Document: shows how to use the navigation features to move through the pages of a document.

Viewing, Zooming and Scrolling: demonstrates some obvious and some less than obvious techniques for changing the viewing attributes of a document.

Output Options: shows how to output documents to destinations other than just the printer.

Using Page Setup: demonstrates how to change formatting settings such as orientation and margins from within the Document Viewer.

Tutorial 7.1

Navigating a Document

Most documents that you print will be more than one page in length. When a document is longer than one page, you need to know how to navigate through the pages. That's the purpose of this tutorial.

1. Start People-Trak, select the Personnel Module, and select the Document Explorer option on the Documents Menu. The Document Explorer dialog is displayed.
2. Select the Physical Letter from the Default Reports category and run the letters. Thirty letters should be generated within the Document Viewer, one for each employee. This should be confirmed with the page counter on the Tool Bar.
3. There are four navigation buttons on the Tool Bar. The outside buttons are used to jump to the first and last pages respectively. Try these now. The page counter and the letter text should indicate which page you are on.
4. The inside buttons are used to jump to the previous and next pages respectively. Try these now. The page counter will confirm that you are moving forward or backward through the pages. The previous and next

buttons do not wrap. If you press the next button on the last page, the first page is not displayed. Try it. Use the Last Page button to display the last page. Then use the Next Page button to attempt to move to the first page. Nothing will happen.

5. The Page Up and Page Down keys can also be used to perform the Previous Page and Next Page functions. However, these keys also perform scrolling. If the document is displayed in some type of "whole page" mode, the Page Up and Page Down keys will jump through the pages one page after another. If the document is partially displayed in a "less than whole page" mode, the Page Up and Page Down keys will perform scrolling until the bottom or top of the page is displayed. Then they will jump to the next page.
6. Continue with the next tutorial.

Tutorial 7.2

Viewing, Zooming and Scrolling

Documents in the Document Viewer can be viewed in a number of ways and the document image can be zoomed for optimal resolution. Let's learn how.

1. When a document is first displayed, the document is displayed so that the width of the page fills the available space. The length of the document can then be viewed using the scroll bar.
2. There are five other view options. These are listed in the View Dropdown on the Tool Bar. We'll try each one.
3. Select the Percentage option to show the document in a percent of size of mode. When this option is selected the Percent Dropdown is enabled. You can use the Percent Dropdown to change the size of the document. Try each of the sizes to see which one you like best.
4. Select the Thumbnail option. This shows a number of pages in a very small size and is not a very useful option for viewing documents.
5. Select the Two Pages option. This shows two pages at a time. It is very useful when you have a two-page letter and you wish to see both pages.
6. Select the Whole Page option. This adjusts the size of the document so that a full page of the document is visible at once. Depending on the size of your monitor and the resolution, this may be a useful option.
7. Select the Page Width option to return to the default view mode. Now let's take a look at the zooming options.
8. Zooming in makes the document image larger and is performed with double-clicks of the left mouse button. Each double-click makes the image larger. Make the image larger now. Zooming out makes the document image smaller and is performed with double-clicks of the right mouse button. Make the image smaller now.

9. Whenever a document image is larger than the screen, scrolling is enabled. You can scroll a document to show the hidden part using the scroll bars at the right and bottom portions of the screen.
10. You can also use another technique to scroll the entire document image dynamically. Enlarge the document image until there are both vertical and horizontal scroll bars. Then click on the document to set the focus. Now hold the left mouse button down and move the cursor around. The document will scroll directly left and right, directly up and down, and diagonally by following the mouse.
11. Close the Document Viewer and continue with the next tutorial.

Tutorial 7.3

Output Options

One of the most powerful capabilities of the Document Viewer is the ability to output documents to destinations other than just a printer. Let's try these options now.

Note: This tutorial assumes that you have the appropriate tools installed to utilize these features. If you do not, the feature may not work as described.

1. Select the Salary History by Employee document from the Compensation category and run the report. This is the document we will use to demonstrate output options.
2. The output options are listed as buttons on the Tool Bar and as options on the File Menu. There are six options: to printer, to spreadsheet, to editor, to PDF, to browser, and to email. The printer option is self-explanatory; we have all printed a document to a printer before. Let's start with the spreadsheet option.
3. Use the Output to Spreadsheet button on the Tool Bar to output the document to a spreadsheet. For most users, the spreadsheet will be Microsoft Excel. After a brief delay, Microsoft Excel is started and the report is loaded, captions and all. Once loaded, you can use your spreadsheet to take any desired action on the document. If you do make changes, you need to remember to either print or save the document since the changes are NOT written back to People-Trak. The output feature is working on a copy of the data in People-Trak, not live data.
4. Close the spreadsheet and then use the button again. Note that the spreadsheet loads much more quickly. This happens because Windows leaves parts of the spreadsheet program in memory.
5. Close the spreadsheet.

Notes: The Output to Spreadsheet option only works with documents that are formatted as rows and columns. Letter and label documents and many standard reports cannot use this option. Microsoft Excel can save documents in a wide variety of formats. When you need

to create a file for another purpose in one of these formats, simply create a report that contains the data you need, output the report to Excel and then use Excel to save the document in the file format you need.

6. Use the Output to Editor button on the Tool Bar to output the document to a word processor. For most users, the word processor will be Microsoft Word. After a brief delay, Microsoft Word is started and the report is loaded. Once loaded, you can use Microsoft Word to change the document just like you could with Excel. If the document is a row and column document, the document is placed into a "table". If the document is a letter or labels, the document is presented as simple paragraphs.
7. Close the word processor.
8. Use the Output to Browser button on the Tool Bar to output the document to a browser or to the program on your computer that is associated with ".HTM" files. For most users, this will be Microsoft Internet Explorer. Your browser will be started and the report is loaded. The browser does not usually have edit capabilities, but you can actually use the browser to save the document as a web page. Now that you know how to put the document in your browser, you can consider the many options you have.
9. Close the browser.
10. Use the Output to PDF button on the Tool Bar to output the document to a PDF viewer. For most users, this will be Adobe Acrobat. Adobe Acrobat is not an editing tool. The usual reason for creating a PDF document is to send the document to someone else via email or another method. Once loaded, you can save the document from within Adobe Acrobat.
11. Close Adobe Acrobat.
12. Use the Output to Email button on the Tool Bar to start the email process. The Send Email dialog is displayed. When a document is sent to email, the document is automatically converted to a PDF file. It is then listed as an attachment on the Send Email dialog. You can see this on Send Email dialog now. The title of the document is shown as an attachment. If you send an email with this document, the document will be attached as a PDF. The Send Email dialog is self-explanatory.
13. Close the Send Email dialog.
14. Any document that you create in People-Trak is always sent to the Document Viewer for visual inspection. From the Document Viewer, you can decide if you need to print or output the document to another destination. Many times you do not need to actually commit paper to the process. When you do not, save the paper for another day.
15. Continue with the next tutorial.

Tutorial 7.4

Using Page Setup

Sometimes a document will be created that looks good, but not quite right. You may wish to change the orientation settings or the margin settings “on the fly”. You can do that within the document viewer using the Page Setup feature. Here’s how.

1. Select the Page Setup option from the File Menu. The Page Setup dialog is displayed.
2. The values on the Page Setup dialog reflect the current settings for your document, but you can change them. Position the cursor to the Right Margin field and increase the right margin.
3. Close the Page Setup dialog. The document will be reformatted to reflect the change. The same thing occurs with orientation. If you have a document in the Document Viewer ready to print in portrait orientation, but you really want the document printed in landscape orientation, you can change the orientation and print it in landscape. Try it now.
4. Open the Page Setup dialog. Change the orientation to landscape. Close the dialog. The document will be reformatted to landscape. You can now print the document as it appears in the Document Viewer, in landscape.
5. The changes that you make “on the fly” are not saved back into the document specification. If you want a document feature to persist, you need to modify the document specification.
6. This tutorial and this lesson are complete. Close the Document Viewer and exit People-Trak.

Notes

Lesson 8

Email

This lesson describes how to use the email feature provided with People-Trak to send emails to individual records and to record groups. It also demonstrates how to email documents from the Document Viewer to selected people or to an email distribution list associated with a document.

Source Text

People-Trak Basics – Chapter 10

Tutorials

Sending an Email to the Current Record: shows how to send an email the record currently being edited.

Sending “Bulk” Email: shows how to send “bulk” email to the group of records currently selected.

Emailing Documents: shows how to email documents from the Document Viewer.

Tutorial 8.1

Sending an Email to the Current Record

There are two ways to send an email to the current record. We'll show both.

1. Start People-Trak and select the Personnel Module.
2. Use the Open Employee feature to open the record for Donald Stern. Now, here is the first method.
3. Position the cursor to the Email field. Note that the Email popup button is displayed. Click the button to start the email process. The Email Message dialog is displayed.
4. When the Email Message dialog is displayed, the email address for Donald Stern is placed into the “To” field automatically. Let's complete this email using all of the available features.
5. At the “CC” field, enter “carboncopy@copy.com”.
6. At the “Subject” field, enter “The file you requested”.
7. At the “Attachment” field, use the File popup to select any file.
8. At the “Send to Notes” field, verify that the checkbox is checked. This will ensure that a note is created for this email. We'll see how the note is created in just a minute.
9. At the “Note Category” field, use the popup to select the “Status” category. This is the category into which the note will be placed.
10. At the large note text field, enter the following text: “Sample note that was emailed”.

11. Send the email using the Send button. The Demo is set up to simulate the sending process. Here's what happens.
 - The email is sent to Donald Stern.
 - The email is sent to “carboncopy@copy.com”.
 - Both email recipients receive the file that you attached as an attachment.
 - A note is created for Donald Stern. The user ID is “DEMO”, the category is “Status”, and the note date is today's date. The note text is the following:

Email Subject: “The file you requested”
Sample note that was emailed

- The file that was attached to the email is attached to the note.
 - The Email Message dialog is closed.
12. Verify Donald's Status notes, then close the notes dialog box, and we will demonstrate the other way to send an email to the current record.
 13. Select the Email option from the File Menu. When the option button dialog is displayed, select the “Use Current Employee” option. The Email Message dialog is then displayed with Donald Stern's email address preset in the “To” field. From this point, sending an email is the same as the prior example.
 14. Clear the Email Message dialog and close Donald Stern. Continue with the next tutorial.

Tutorial 8.2

Sending “Bulk” Email

1. Use the Open Employee feature to start the Lookup process. Create a record group that contains all of the employees and select Donald Stern.
2. Select the Email option on the File Menu. When the option button dialog is displayed, select the “Use Current Group” option. The Email Message dialog is then displayed with the email addresses for each record in the group.
3. Position the cursor to the “To” field. A popup button is displayed adjacent to this field. This popup is not used to select any values, but is used to show you the list of email addresses for which email is to be sent. Note that the list is not long. This is because many of the records do not have email addresses, and thus the email addresses cannot be added to the list.
4. Once the remaining fields of the Email Message dialog are completed, the emails will be sent to each address in the list. If you have specified an attachment file, the file will be sent to each email address. If you have indicated that a note is to be created, a note will be created for each record for which an email address exists.
5. Close the Email Message dialog without sending the emails.

6. Use the Open Employee feature to start the Lookup process. Create a record group that contains all of the employees who do have email addresses. Can you do it? Here's how. On the Custom tab, enter "Email" as the field name and "<" as the operator. Perform the search. The same list of records shown on the Email Message dialog is displayed. It is not necessary to pre-select only those records that have an email address before sending emails, but this is the method for determining the records that will receive an email prior to the email being sent. Close the group.
7. Remember that you can modify the records in the group after the group has been created using the Edit Lookup option on the File Menu.
8. Continue with the next tutorial.
9. Run the report again. From the Document Viewer, select the Email option. When the Email Message dialog is displayed, the three emails you added are automatically placed into the "To" field.
10. This tutorial and this lesson are complete. Close the Email Message dialog without sending the email. Close the Document Viewer and the Document Explorer and exit People-Trak.

Tutorial 8.3

Emailing Documents

1. Select the Document Explorer option from the Documents menu. Select the "Alphabetic Employee List" from the General category and run the report.
2. In the Document Viewer, select the Email button on the Tool Bar. When the button is pressed, the document is output to a temporary file in PDF format. The Email Message dialog is then displayed. The temporary PDF file is automatically set as the value of the Attachment field. The subject is automatically set to the name of the report.
3. This document can now be emailed to any email addresses that you enter in the "To" and "CC" fields. The addresses need not be for records that are tracked within People-Trak; documents can be sent to any email address.
4. If you check the "Send to Notes" field, the email addresses will be checked against the records in the current company. If the email address matches the address for a record, a note will be created for that record.
5. Clear the Email Message dialog without sending the email. Close the Document Viewer.
6. You can define an email distribution list for any document. When you output this document to email, the email addresses from the distribution list will be automatically added to the "To" field when the Email Message dialog is displayed. Let's create a distribution list now.
7. Highlight the "Alphabetic Employee List" in the General category, but do not select the document for editing or printing. Instead, select the Properties button on the Tool Bar. The Document Properties dialog is displayed.
8. The third tab on the Document Properties dialog is used to record the distribution list. Two columns are provided: one for the name of the person, and one for the email address. Enter three fictitious email addresses. Close the dialog.

Lesson 9

Batch Processing 1

This lesson describes the techniques used to load and post batches. It also shows how to postpone a batch that cannot be completed and to recall that batch at a later time.

Source Text

People-Trak Basics – Chapter 11

Tutorials

Loading a Batch: demonstrates how much faster batch processing can be than manually entering records. Also shows how the operating conventions for batch processing dialogs are the same as those in other dialogs.

Posting a Batch: shows how to post a batch and print the audit trail. Also shows how to confirm that a batch entry has been posted.

Postponing and Recalling a Batch: demonstrates how to postpone a batch in process and to recall that batch at a later time.

Tutorial 9.1

Loading a Batch

1. Start People-Trak and select the Personnel Module.
2. Select the record for Donald Stern and position to the Performance Reviews screen. Use the Insert Row feature to insert a new row for Donald's latest review. Then key the review as shown below.

Review Date:	Today's Date
Review Type:	Annual (from table - note that next type and next date are set)
Rating:	Excellent (from table)
Reviewer:	Julie Carrington (from table)
Salary Change:	Check the box.

3. Close the record. Now select two other records and record the same review. This will demonstrate how performance reviews are keyed without batch processing. Close any open record and continue with the next step when complete.
1. Select the Performance Batch option from the Processing menu. The Performance Batch dialog is displayed.
2. Enter a "1" in the "Employee #" column and press the ENTER key. A list of those employees with employee numbers that start with "1" are displayed. Select the record for Donald Stern. The full employee number and the last name are returned to the first two columns.
3. Use the Delete Row button on the Tool Bar to delete this entry. Now, enter the complete employee number "1006" and press the ENTER key. Because "1006" is a direct

match for Donald Stern, the number and name are returned.

4. Delete the row again and let's try something else. You can select employees by either number or name. To select an employee by name, position the cursor to the Employee Name column and enter the letter "S". When you press ENTER, you will be presented with a list of all employees with a last name starting with "S". Select Donald Stern. Again, the number and name are returned to the first columns.
5. Finally, clear the row one last time. Now select Donald Stern by keying a complete last name in the Employee Name column. When the name and number are displayed for the fourth time, you will have demonstrated for yourself that you can select an employee for a batch using a full or partial name or number. Now we can continue with the batch.
6. Position the cursor to the Review Date field. This field, as with all fields in batch processing, shares the same attributes as the corresponding field on the data entry screen. Thus, you can enter the date using standard operating conventions. These include keying the date by hand, using the calendar popup, or using the Date Stamp feature. The Date Stamp feature is very useful in batch processing because you frequently key records with the same date. Let's use the Date Stamp feature by pressing the Date Stamp on the Tool Bar or Function Key 4.
7. At the Review Type field, use the popup to select the "Annual" review. Note that the Next Review Type and Next Review Date are automatically set based on the entries in the table.
8. Complete the rest of the review just as you did earlier on the Performance Review screen.
9. Continue with the next tutorial.

Tutorial 9.2

Posting a Batch

1. Complete two additional performance review entries for other employees in the batch from the prior tutorial. Use whatever values you desire. Note that you will find the Date Stamp feature quite handy here.
2. When the three entries are complete, use the Post Batch button on the Tool Bar or the Post Batch option on the File Menu to post the batch. The prompt shown below is displayed.

Post this Batch?
3. Select "Yes" to post the batch. When the batch has been posted, an audit trail is created and displayed in the Document Viewer. The audit trail is a history of the work you have just performed.
4. When you create real batches, you may wish to print and file the batch or use it to compare against the original

source documents to confirm that all entries were entered and posted. For now, just exit the Document Viewer.

5. When you leave the Document Viewer, the Performance Batch dialog is displayed and all of the records that have been posted are cleared. You can create another batch or you can exit the batch and perform another task.
6. If records could not be posted for some reason, the records that could not be posted will not appear in the audit trail and will not be cleared from the dialog. You can try to post the records again or you can postpone that portion of the batch for a later time. Instructions for postponing a batch are provided in the next tutorial.

The most common reason why a record will not post is that another user is currently editing that record. People-Trak prevents an open record from receiving an entry from a batch processing program.

7. Exit the batch and look up the record for Donald Stern. Position to the Performance Reviews screen and note that the review that you “batch entered” is now the first record on the screen and that all other records have been pushed down. This is the way that all batch processing programs work. The new entries are always added at the top.
8. Continue with the next tutorial.

Tutorial 9.3

Postponing and Recalling a Batch

1. Select the Performance Batch option from the Processing menu. When the dialog is displayed, open and review the File menu. Note that both the Open Batch and Postpone Batch options are disabled (grayed out). You can only open a batch if a prior batch has been postponed and you can only postpone a batch that has been started. Let’s show how to use both of these features.
2. Using what you have learned in this lesson, enter a three-employee batch of performance reviews.
3. When the batch is complete, open the File menu again and note that the Postpone Batch feature is now enabled. Select this option to postpone the batch that you have created. The prompt shown below is displayed.

Enter batch name:

4. Enter a name for the postponed batch. A good entry for the moment might be “my postponed batch”. Then press OK to process your entry.
5. The batch you created is cleared from the dialog because it has been postponed. Now open the File menu and note that the Open Batch option is enabled. Select the Open Batch option. You will see a list of all open batches for this particular batch type. Select the batch that you just postponed. The batch dialog will be populated with the entries that were postponed.

6. When a postponed batch has been loaded, you can treat the batch just as if you had just keyed the batch from scratch. You can post the batch, you can delete or edit rows from the batch, or you can postpone the batch again.

Note: Postponed batches can be easily forgotten. For this reason, postponed batches will show up in you inbox. You will learn about the inbox in a subsequent lesson.

7. Go ahead and post the batch. Then exit the Document Viewer when the audit trail is displayed.
8. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 10

Batch Processing 2

This lesson shows how to use combo style batch processing dialogs and how to use the advanced lookup capabilities to rapidly populate batches.

Source Text

People-Trak Basics – Chapter 11

Tutorials

Using a Combo Style Dialog: demonstrates how a combo style batch dialog differs from a grid style batch dialog.

Using Lookup to Load Batches: shows how to use the various features of the Lookup dialog to select records for use in batches.

Tutorial 10.1

Using a Combo Style Dialog

1. Start People-Trak and select the Personnel Module.
2. Select the Training Batch by Employee option from the Processing menu. This batch option is used to record the courses taken by employees when each employee has taken a different course. It is useful when course completion history has accumulated in your inbox and you wish to enter all the courses at once.
3. Close the Training Batch by Employee dialog and select the Training Batch by Course option from the Processing menu. This batch option is used when a group of employees have attended the same course at the same time. For example, if a safety course or orientation course has been taught to a group of employees, you would use this option rather than the batch by employee option.
4. In a Combo style dialog, you specify what happened once and then specify all of the employees for whom it happened. In the case of a training course, what happened was the completion of a specific course.
5. Position to the Completion Date field. Enter today's date using the Date Stamp feature.
6. At the Course Code field, select the "CPR" course from the table. Most of the remaining fields are completed from the table except the certification and the certification expiration date.
7. Change the check box for "Certification" field from unchecked to checked. Then set the expiration date forward one year from today.
8. These entries complete the course record for all of the employees who attended the course. Now we must enter those employees.

9. Position the cursor to the first row of the grid on the right side of the dialog box. This grid works just like the wider grids on the other batch processing programs. You can enter full or partial names or employee numbers to select employees.
10. Use this feature now to select three or four records. When complete, continue with the next step.
11. The batch is now ready to post. Use the Post Batch button on the Tool Bar or the Post Batch option on the File menu to start the posting process.
12. As with the grid style dialogs, an audit trail is generated when posting is complete. In addition, if selected records cannot be posted, you will need to post the records before leaving the batch as there is no "postpone" feature for combo style dialogs.
13. Close the Document Viewer and close the Training Batch by Course dialog. Select one of the employees you posted the training course for and verify that the posting was made. This same posting will have been made for each employee you selected.
14. Close any open records and continue with the next tutorial.

Tutorial 10.2

Using Lookup to Load Batches

You have now seen how to select records in both grid style and combo style batches. It is fast and easy. However, there are even more powerful methods of selecting employees. We'll try this here.

1. Select the Training Batch by Course option from the Processing menu. Then select the Lookup option from the File menu.
2. When the Lookup dialog is displayed, you can use any of the regular features associated with the Lookup dialog to select an entire group of employees for processing. Let's try a few options.
3. Position to the Custom tab. Now let's assume that you wanted to record a training course that was completed for every employee in a specific department. You could look up the employees individually, or you could enter a simple query and select them all at once. Enter the simple query: "Department Code = 200". Then press the Search button to start the search.
4. The employees working in department 200 are listed. Press the OK button to return this list to the grid. Quickly review the grid. If one or more of the employees was not present in the course that day, simply use the Delete Row button to delete that employee from the list. Try it now. Delete "Ellis". Likewise, if another employee from another department was present, you can simply select the employee directly. Try it now, move to the first blank row, and select and add Donald Stern.

-
5. When the list of employees reflects the actual attendees in the course, complete the course information on the left side of the dialog. Then post the batch. An entry for the course specified will be added to the training history for each employee listed. You can verify this if you wish.
 6. As mentioned above, you can take advantage of all of the features of the Lookup dialog. This includes any favorites you have created. (We have not learned how to create favorites yet, but one has been created for you in the Demonstration data).
 7. To show how the Lookup dialog can be used with grid style batch dialogs, select the Performance Review Batch option from the Processing menu. Then select the Lookup option from the File menu.
 8. Position to the Favorites tab. Click on "My Favorite" to select the favorite created for you and perform the search. Then press the OK button to return the selection to the grid.
 9. Now you have a list of employees ready for performance review detail. You can enter the review information and post the reviews in a fraction of the time required to record performance reviews individually. However, there is no need to prove that point here. Instead, we'll demonstrate another way to use the Lookup feature.
 10. Use the New Batch option on the File menu to clear the list of records you selected. When you are prompted to abandon the batch, abandon the batch.
 11. Use the Lookup dialog to select all active employees. When the list of employees is returned to the grid, you have an automated checklist of the employees who must have information recorded. If the record is not complete, the batch is not complete. If this takes a while to complete, you can use the postpone batch to complete it later.
 12. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 11

Workflows

This lesson shows how to use existing workflows to update existing records and to add new records.

Source Text

People-Trak Basics – Chapter 12

Tutorials

Modify an Existing Record: demonstrates how to modify an existing record using one of the supplied workflows.

Add a New Record: shows how to add a new record using one of the supplied workflows.

Tutorial 11.1

Modify an Existing Record

1. Start People-Trak and select the Personnel Module.
2. Select the Address workflow from the Activities menu. The Address workflow is one of the supplied workflows. It will be used for demonstration purposes. You can, of course, change this workflow in any way. You'll see how to do that in the next lesson. At this point, we will be learning how to use workflows.
3. Workflows are normally used to modify the information for an existing record. Thus, the first step is to select an employee. There are a number of ways to do this. We will demonstrate them all.
4. The simplest method used for looking up records is to simply click on the Lookup button. This will provide a list of all the employees in the current company. Try it now to select Donald Stern. This is a helpful method unless you have many employees and scrolling through them takes time. Click on the Clear button to clear Donald Stern's record and we will try another method.
5. Verify that the cursor is positioned to the Employee ID field. At this field, enter the partial employee number "1" and press the ENTER key. The lookup feature will search for all employees that have an employee number starting with "1" and will display all matches. Try it now to select Donald Stern. Clear Donald Stern and continue.
6. If you enter a number that provides a unique, direct match for an employee, the employee will be directly displayed. Enter the number "1006" and see what happens. Donald Stern is displayed because is his unique employee ID. Clear Donald Stern and try the next method.
7. The Last Name field can be used just like the Employee ID field. You can enter partial or full names to multiple or direct matches. Enter "S" and press the ENTER key. Select Donald Stern and then clear him. Enter "Stern" in

the Last Name field and press the ENTER key. This will cause Donald Stern to be displayed directly because he is the only employee with the last name "Stern". This time, leave Donald Stern displayed and continue.

8. When an employee is selected, the existing information for that employee is displayed in the provided fields. You can change this information and post it back to the employee's record by simply overriding the information currently displayed.
9. Before doing this, scroll the cursor through the fields on the workflow using the DOWN ARROW key. Note that table popup buttons appear for the fields that are supported by tables on the Personal screen. (In this workflow, each of the fields is taken from the Personal screen). In fact, all of the attributes of the fields on the workflow are identical to the attributes on the Personal screen. This includes table support, width, length, edit attributes, mandatory settings, etc. Entering or changing information on the workflow is identical to entering or changing information on the Personal screen.
10. Now let's make a change and see how this thing works. Change Donald Stern's address to the following.

100 Main Street
Apartment 22
Bonsall, CA 92003
11. When complete, click on the Save button to save the changes. The workflow screen will be cleared so that you can select other records. Close the workflow screen using the Close option on the File menu.
12. Select Donald Stern using the regular lookup feature and verify the changes. You will see that the changes have been made just as if you entered them right on the screen that is currently displayed. Close the record.
13. Select the Name and Salutation workflow from the Activities menu. This is another of the supplied workflows. It is simply another collection of fields used for another purpose. It works exactly the same way as the Address workflow. Select Donald Stern and change his prefix to "Sir" and his suffix to "Esq". Save the change and close the workflow. Use the Lookup dialog to select Donald Stern and confirm that we have made him a bit more important than he was before.
14. Continue with the next tutorial.

Tutorial 11.2

Add a New Record

In the last tutorial, we saw that a workflow could be used to add or change information for an existing record. In this tutorial we will demonstrate a workflow can be used to add a new record from scratch.

1. Select the Name and Salutation workflow from the Activities menu.
2. Select the New button to start a new record. The cursor is positioned to the Employee ID field and the Lookup button is then disabled. In addition, the lookup feature associated with the Employee ID and Last Name fields is disabled so that you can enter an ID and last name without interference.
3. Enter the new employee as shown below.

ID	99999
Last Name	Jones
First Name	Robert
Middle Name	Joseph
Salutation	Bob
Other Name	
Prefix	Dr.
Suffix	MD

4. Click on the Save button to post the changes. The dialog is cleared and the appropriate features are activated just as if the dialog had just been displayed.
5. We can verify that Robert Jones has been added without leaving the workflow. Simply enter "99999" as the employee ID and bring him up. Since you may not believe that Bob is really in the database, close the workflow and use the regular Lookup dialog to select Bob and see for yourself that he has been added.
6. Close the record and return to the Name and Salutation dialog. Select the New button to start a new record. At the Employee ID field, enter "1006" and press the ENTER key. You will be greeted with an error message. This is because employee ID 1006 is already in use by Donald Stern. Even though the lookup feature is disabled to allow you to record a new employee ID, it does not mean that validation is not working.
7. You can add an employee from any workflow. Try it now. Use the Address workflow to add your own fictitious employee.
8. In this lesson we learned how to use existing workflows. Workflows that you create operate in the exact same manner. You'll see how to create and change your own workflows in the next lesson.
9. This tutorial and this lesson are now complete. Exit People-Trak.

3

Query and Reporting

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Notes

Lesson 12

Introduction to Reporting

The adhoc report feature is used to create a large variety of user-defined reports and to select and run any of the hundreds of pre-defined custom reports provided with the product. The reports can be customized as to which records are to be included and which fields from the database are to be printed.

Source Text

People-Trak Basics – Chapter 13

Tutorials

Create a Simple Report: demonstrates the techniques used to create a simple report. This includes selecting fields and using derived fields.

Changing the Report Type: shows how to change the report type from columnar format to tabular format. Also provides a description of the benefits of each report type.

Basic Formatting Options: shows how to manipulate a report by changing the orientation, spacing, gridlines, and auto-format features.

Auto-format: demonstrates how the auto-format feature handles many of the formatting decisions for you so that you can focus on what the report is supposed to do for you, not what it is supposed to look like.

Tutorial 12.1

Create a Simple Report

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option. Documents are broken down into categories. For our purposes, click on the General category (Note: later, when we save our sample, it will be saved into the General category).
3. To begin a new report, use the New Document button on the Tool Bar or the New Document option on the File Menu. A list of the different kinds of documents will appear. Select Adhoc Report and click OK. The Adhoc Report dialog box is displayed. The cursor will be positioned to the Report Title field on the Specification tab.
4. Change the title to “Test Report” and switch to the Report Definition tab. The Report Definition tab uses a grid to collect the fields you wish to report on. Each row in the grid defines a column in the report. Let’s start defining columns now.
5. The first thing we need to learn is how to select fields. There are two ways. You can enter the name of the field if you know it, or you can select the field from the Fields popup. In the beginning the Fields popup is much easier because you will not know the names of the fields from

memory. Later you may find that you do remember many of the field names and you will enter them from memory. Let’s select a field the easy way.

6. Click on the popup button adjacent to the Field Name column. The Fields popup is displayed. The Fields popup provides two tabs for selecting fields. The first tab lists the fields by screen and the second tab lists the fields in alphabetic order. On the first tab, select the Personal screen and then scroll down to highlight the First Name field. Double-click or press the ENTER key to select the field.
7. When the Fields popup closes, the field name selected is returned. In addition, the Print and Repeat columns are checked and the Sort column is set to “None”. These settings are called defaults and can be overridden when necessary.
8. It may seem strange, but this simple selection of a field constitutes a report. Click on the Run button on the Tool Bar or use the Run option on the File Menu to start the report. The report you have created will be shown in the Document Viewer. The report will be a simple list of the first names for each employee in the DEMO company.
9. Now let’s expand our report. Use the Fields popup to add the Last Name field to the report and then run the report again. Now we have a first and last name report for all employees in the company.

Note: The reports that we are learning about in this lesson will always contain all of the employees because we are not entering query equations in the second tab. In this lesson we are learning to determine what information will be shown in a report. In the next lesson, we will learn how to determine which records will be included in the report.

10. Add the following five fields to our ever-improving report: Address 1, Address 2, City, State, and Zip. Now run the report. We now have a name and address report for the employees in the DEMO company. Note that the order in which the fields are entered from top to bottom in the grid is the order in which the fields are listed as columns across the top of the report.
11. When you have used the Fields popup during this tutorial, you may have noticed that there is a category on the Screen Order tab that is not a screen. It is the first category and it is named “Derived”. Derived fields are fields that are created for you and that you do not enter directly. For example, there is a Full Name field. The Full Name field is not something you enter. It is derived for you from the First Name, Middle Name, and Last Name fields.
12. The derived fields can be used in reports just like any other field and they are very, very useful. Let’s modify our name and address report to use these fields.
13. Position the cursor to the Field Name column for the first row. Change the first field from First Name to Full Name using the Fields popup. Then use the Delete Row

function to delete the row containing the Last Name field. Then run the report. Note that the combined full name makes this report easier to read. There is another derived field that is even more useful in reporting. This is the Name Full Backward field. Change the Full Name field to this field using the Fields popup. Run the report.

14. The Name Full Backward field provides a combination of the First Name, Last Name, and Middle Initial fields in a format that is frequently used. The last name comes first, followed by a comma and space, the first name followed by a space, and the first letter of the middle name followed by a period. Our name and address report is getting better by the minute.
15. To further simplify the report, delete the rows containing the City, State, and Zip fields and add the derived field that contains all three values. Run this version of the report and you will see a very clean name and address report. The derived field for the city/state/zip derived field is very, very useful when creating mail merge labels and letters. It is also useful when creating address lists such as this. For other reports, such as a carpool reports that needs to isolate these fields, you would use them separately.
16. Thus far all of the fields in our report have been taken from either the derived fields or the Personal screen. This is not a limitation. You can select any combination of fields from any screen that you desire. We'll show this as the last step in this tutorial.
17. On the first blank row in the grid, select the Employment Status field from the Status screen. On the next row, select the Pay Rate field from the Compensation screen. Run the report. All of the fields are listed just as before. There is a lot of "stuff" going on behind the scenes to make this easy, but you do not need to know about that. All you need to do is select the fields you wish to report on.
18. This report is used in the next tutorial. Simply continue with the next tutorial.

Tutorial 12.2

Changing the Report Type

Because the last tutorial was so long, we will make this one short. Here's how to change the format of the report from columnar to tabular.

1. Change to the Specification tab and position the cursor to the Document Type field. The field should indicate "Columnar". When we created our test report, we did not directly specify this type of report. It is a default because it is the type of report you will create the most often. There are other defaults as well, some of which you can change. We will look at those in the next tutorial.
2. The Document Type field is supported by a table, but there are only two document types: columnar that you have been working with and tabular. Use the table to change the document type to tabular.

3. Run the report in tabular format. Note that all of the same fields are present, but that there is a sort of "mini-report" for each employee. The fields are oriented vertically in a stack rather than horizontally in columns. This is a tabular report. You can switch documents between types whenever you want.
4. Tabular reports work best when you have more fields than can stretch across the paper horizontally. You can list a lot more fields vertically, but a report with a large number of employees will take a lot of paper. The decision to use either report type is yours based on your needs.
5. Change the report type back to columnar and run the report again. Yes, the report is restored to its original glory.
6. Continue with the next tutorial.

Tutorial 12.3

Basic Formatting Options

There are other basic formatting options that you can set on the Specification tab. We'll take a look at these now.

1. Position the cursor to the Orientation field. The field should indicate "Portrait". As with the document type, the portrait orientation is a default. In portrait orientation, the page is oriented vertically. In landscape orientation, the page is oriented horizontally. Orientation settings can be overridden by the Auto Format setting. If the Auto Format feature is currently active, deactivate it now.
2. Use the Orientation table to change the orientation of our report from portrait to landscape. Run the report. You may not see much of a difference, but there should be more white space to the right of the report. Landscape orientation is useful when you have a lot of fields to print and you do not want to reduce the font size to something only an ant could read. However, with landscape orientation, you get fewer lines per page and thus the report will be longer.
3. Change the orientation back to portrait and then activate the Double-Space feature. Run the report in this mode and you can see that there is a lot more space between the rows. This is a popular feature when reports are submitted for review and editing. Coupled with the landscape feature, you can produce reports with lots of white space for annotation. Of course, if the rows take up twice as much space, the report will require twice as much paper.
4. Deactivate the Double-Space feature and then activate the Show Gridlines feature. This feature causes grid lines to be inserted between rows and between columns. Try our report in this mode to see if you like it. Many users grow accustomed to Excel and this feature causes People-Trak reports to emulate Excel style reports. Our current report is a simple report and may or may not look better with grid lines. With more complex reports that we will produce later, grid lines can be very, very helpful in making reports easier to read.

5. These formatting options can be combined in any variation. Try the Double-Space option with the Show Gridlines option and run the report. You can see that the white space is contained within the gridlines and can assist in the annotation process.
6. Continue with the next tutorial.

Tutorial 12.4

Auto-format

The auto-format feature allows you to create reports without regard to formatting and column sizing issues. This is what happened when we created our test report. We just selected fields and let auto-formatting take over. To demonstrate how auto-formatting works, let's make some changes to our test report and see what happens.

1. On the Specification tab, activate the auto-format feature and deactivate double-space and grid lines. Run the report and when it is displayed, note the width of the columns, particularly the Address 2 column.
2. With the auto-formatting feature, columns are automatically sized to be just wider than the longest field coming into that column. In general, the Address 2 field is short and thus, the column is narrow.
3. Turn off auto-formatting and run the report again. Note that suddenly the Address 2 column is very wide, much wider than the typical data item. Without auto-formatting, column widths are fixed to the length of field used on the data entry screens. If the field is two inches wide on the screen, it will be two inches wide on the report.
4. Let's intentionally increase the width of the report and watch what happens. Add the Address 1 field to the bottom of the report five times and run the report between each change. Without auto-formatting, the report will quickly go off the page and you will be notified that data will be lost. Delete the rows you just added and then reactivate auto-formatting.
5. Now repeat the process. As the report grows, the font size will be reduced as auto-formatting tries to make the report fit in portrait orientation. When the report cannot fit in portrait, auto-format will switch the document to landscape and then start the font sequence again. Only after auto-format has done everything possible to fit the report will you be notified that the report data will be lost off the edge of the page.
6. Because of the orientation switch, the orientation setting on the Specification Tab is irrelevant when auto-formatting is active. However, the other settings do work. You can use double-space and grid lines with auto-format. Select these and try them. The report will work fine.
7. There are other features that will allow you to control the formatting of a report, but that is the content of another lesson. This tutorial and this lesson are now complete.

Exit the test report that you have created and then exit People-Trak.

Notes

Lesson 13

Introduction to Query

This chapter introduces the concept of query equations that are used to select records for use in documents and lookups.

Source Text

People-Trak Basics – Chapter 14

Tutorials

Developing Simple Queries: demonstrates how to create and use simple query equations in the production of an adhoc report. All equations use the basic “=” operator.

Trying Other Operators: shows how to use all of the non-compound operators.

Compound Operators: shows how to create equations using the compound operators “Between” and “Outside”.

Tutorial 13.1

Developing Simple Queries

1. Start People-Trak, select the Personnel Module, and then select the Document Explorer from the Documents Menu.

2. Create a new adhoc document using what you have learned in prior lessons. Give your new document the title “Test Query”. Position to the Report Definition tab and select the following three fields in the order shown.

Last Name
Gender
Age

3. Position the cursor to the Query tab. Now let’s run this simple report without any type of query. When the report is displayed, you will see the last name, gender, and age for every employee. Close the Document Viewer.

4. Enter the following query equation.

Gender = Female

5. “Gender” is a field name and should be entered in the Field Name column. “=” is an operator and should be entered in the Operator column. “Female” is the contents we are comparing and should be entered in the Contents column. We will not be using the “(, “)” or the Mod columns for this example. Simply leave these blank.

6. Run the report. The list of employees you saw before has now been reduced. Only those employees with the phrase “Female” in the Gender field are listed. You can validate this by looking at the Gender column on the report and by checking the number of records. That is a simple query. You have effectively stated “list the last name, gender, and age for those employees with ‘Female’ in the Gender field.

7. Close the Document Viewer and change the query to look for males. Run the report and note how the report has changed. Only the males should be listed.

8. Let’s try some other options based on the Last Name field. Change the query to the following and run the report. There are two employees named “Wilson” and thus there should be two employees listed.

Last Name = Wilson

9. Change the contents portion of the query to “Stern” and run the report. There is only one employee named “Stern” and thus only one employee should be listed. Now change the contents to “Bogus” and run the report. There is no employee with the last name “Bogus” and thus the message shown below is displayed.

No Information to Report

10. There are plenty of employees in the company, but there are no employees with the last name “Bogus”. Thus far, we have used query fields that are also included in the Report Definition, but that is not required. We have chosen these fields because it is easier to validate the results of the query. Let’s try a query that does not use one of the fields in the Report Definition. Change the query to the following and run the report.

First Name = Donald

11. The report indicates that there is only one employee that meets the criteria: Donald Stern. You have seen Donald Stern many times, but are there no other employees with Donald as their first name? You can either trust the query or you can add the First Name field to the Report Definition and confirm it yourself.

12. In some queries, you may wish to look for fields that do not contain a value. Clear the Contents field completely. Now run the report again. The report should indicate that there are no records that have a blank first name. There are a number of records, however, that have a blank Other ID field. Change the query to the following and run the report.

Other ID =

13. You should see a list of the employees who have nothing in the Other ID field.

14. When you are entering the Contents portion of a query equation, the Contents field assumes the editing attributes of the field identified by the Field Name. For example, if the field specified is the Hire Date field, the Contents field will assume that a date should be entered. Try this now.

15. Change the field name to “Hire Date”. Then position the cursor to the Contents field. Note that the Date popup is now adjacent to the field. Try entering a character such as “A” or “B”. Note that the characters are ignored just as they are at all date fields. Enter an invalid date such as

“33-33-3333” and try to run the report. The invalid date will be rejected.

16. Now change the field name to “City” and then return to the Contents field. Note that there is a table popup button adjacent to the field. Click on the button to see a list of the cities in the City table. You can use the corresponding tables to support data entry in a query.

17. Numeric fields are also validated for length and format. Change the field name to “Pay Rate” and try to enter a character. This will not be allowed. Try a rate such as 99.99999. Since the Pay Rate field cannot accept five digits to the right of the decimal point, the value is adjusted.

18. Even with all of these validation features, you can still create invalid queries. The most popular method is to set the field, enter a valid formatted entry for the contents, and then change the field name. In this way, you can create an equation such as “Hire Date = Donald”. This invalid query will be trapped when you attempt to run the report. Try it now. Clear the field name. Change the contents to “Donald”. Then return to the field name and set the field to “Hire Date”. Now run the report. The message shown below is displayed.

Field and contents are not compatible.

19. There are a number of features that trap invalid equations. If an invalid equation does get through the process, the result will usually be that no records qualify for the report. In our example, if the query “Hire Date = Donald” was able to run, there would be no records that meet the criteria.

20. Continue with the next tutorial.

Tutorial 13.2

Trying Other Operators

All of the examples in the previous lesson have used the “=” operator. There are actually a wide variety of operators that you can use in your query equations. This lesson will explore many of these operators.

1. The “Contains” operator is used to find records where the field specified contains the contents somewhere. Try the equation shown below.

Last Name Contains ils

2. At first glance, this query seems odd, but it will return all the records that have the three characters “ils” somewhere in the last name. This includes two “Wilson” and one “Pilsner”. For the inverse query, change the operator to “<>CN” which is used to list those records that do not contain “ils” in the last name.

3. The “Starts” operator is used to find records where the field specified starts with the phrase specified in the contents. Try the equation shown below.

Last Name Starts S

4. This equation will return every record that has a last name starting with “S”. You are not limited to a single character. You could enter the equation below to find employees with last name starting with the six-character phrase “Carring”. There is one. Try it and see. The inverse operator is “<>ST”. This will find all of the records that do not start with this phrase.

Last Name Starts Carring

5. The “Ends” operator is used to find records where the field specified ends with the phrase specified in the contents. The equation below is an example you can try yourself.

Last Name Ends son

6. The numeric operators are pretty obvious. You can look for numbers less than, less than or equal to, greater than, or greater than or equal to the value specified. Try the following equation. It will list all employees with an age greater than 21. If you change the operator to “>=”, you will also include those employees who are currently 21.

Age > 21

7. The numeric operators can also be used on text fields. Try the equation shown below.

Last Name > Jones

8. The report will list all employees with a last name that is greater than (alphabetically speaking) than “Jones”. This would include “Stern” and “Wilson”, but not “Jamison”.

9. If you switch the query to that shown below, the report would include “Adams” and “Healy”, but not “Stern”.

Last Name < Jones

10. Continue with the next tutorial.

Tutorial 13.3

Compound Operators

There are two remaining operators to demonstrate. These are the compound operators that use two entries in the Contents field. Here’s how they work.

1. Change the field name to “Age” and set the operator to “Between”. “Between” is a compound operator that compares the contents of the field to the range specified.

2. Position the cursor to the Contents field. Note that there is a popup button adjacent to the field. This button is used to capture the range. Select the button now to display the Set Between Values dialog.

3. The Set Between Values dialog contains two fields. These fields are used to set the starting and ending values for the range. Both fields take on the attributes of the appropriate field type. In our example, we have used Age as the field. Thus, the two fields on the dialog use the numeric attributes of the Age field.

4. Enter "30" in the first field and "40" in the second field. Then close the dialog and run the report. Note that the ages listed for the employees are all between 30 and 40 inclusive. That means that employees aged 30 and 40 are also included.

5. The Set Between Values dialog makes entering ranges quite easy, but you can actually enter them manually. Return the cursor to the Contents field and clear the entry that was generated by the dialog. Now enter the phrase shown below and run the report. The results will be the same as before.

30 And 40

6. The Between operator can be used for numeric fields, date fields, and text fields. If you were looking for employees hired over a given period, you could use a query of the format shown below.

Hire Date Between 01-01-1990 And 12-31-1995

7. Change the field to Hire Date and use the Set Between Values dialog to create this equation. Now run it. Only employees hired during that time will be listed. You can add the Hire Date field to the Report Definition to confirm this if you wish.

8. The Between operator has an inverse operator named "Outside". It is used to find records that are outside of the stated range rather than within the range. Change the operator in equation listed above to "Outside". Now run the report. The report will now include all of the employees that were not listed in the prior report and none of those who were.

9. The range specified by the Outside operator is exclusive. Thus, in this example, employees hired since the beginning of time through 12-31-1989 and from 01-01-1996 through the present are included.

10. This tutorial and this lesson are now complete. Save your report and exit People-Trak.

Notes

Lesson 14

Sorting and Calculating

This lesson introduces the sorting and calculation features in the adhoc report writer.

Source Text

People-Trak Basics – Chapter 13

Tutorials

Simple Sorting: shows how to perform simple sorting using one or more fields.

Advanced Sorting: demonstrates the “break” and “eject” sort options.

Using Calculations: shows how to use each of the calculation options provided while taking demonstrating the relationship between sorting and calculations.

Tutorial 14.1

Simple Sorting

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select “Adhoc Report”.
3. Select the Report Definition tab and enter the following three fields: Last Name, City, and Age. Note that when fields are selected, the Sort column defaults to “None”. Run the report. The records are listed in no particular order because no sort was supplied. (In actuality, the records are listed in the order in which they were entered into the database).
4. Set the Sort Type column on the Last Name field to “Sort”. Note that the Sort Order column defaults to “Ascending”. Ascending order means “A to Z” for text based fields and “1 to 999” for numeric fields. Run the report and you will now see that the records are sorted alphabetically by last name in ascending order.
5. Change the sort order from Ascending to Descending. Run the report. The records should now be sorted alphabetically by last name in descending order. Now let’s see how it works on numeric fields.
6. Deactivate sorting on the Last Name field by setting the Sort column to “None”. Activate sorting on the Age field by setting Sort column to “Sort”. Run the report. The records are listed in ascending order by Age. Switch the sort order to descending and run the report again.
7. That is simple sorting with a single field. Now let’s try simple sorting with two fields. Change the order of the fields in the Report Definition grid so that City comes before Last Name. If you remember grid conventions,

you can use the red Down Arrow to push the “Last Name” row down. Now, we can double-sort.

8. Set the Sort column on the City field to “Sort”. Set the Sort column on the Last Name to “Sort”. This report should now sort the records alphabetically by Last Name within City. Try it. You should see that the cities are sorted alphabetically in ascending order. Within each unique city, the records are sorted in ascending order by last name. This is double-sort or a compound sort. The reason we needed to move “City” to the first row is that the order in which fields are sorted is determined by the order in which the fields appear on the Report Definition grid.
9. Let’s make this report much easier to read. Turn off the Repeat checkbox for the City column and run the report. Only the first occurrence of each city is printed and the report has a “pan-handle” format. This format is much easier to read because it becomes very obvious when the sort order changes.
10. When using compound sorts, it is not necessary to use the same sort order on each column. Change the sort order on the Last Name field to “descending” and run the report again. The sort order for the City field remains the same, but the sort order for Last Name within City is reversed.
11. As a final step in this tutorial, reverse the sort order for the City column and run the report. Now both columns are in descending order.
12. Continue with the next tutorial.

Tutorial 14.2

Advanced Sorting

1. The next level of sorting is called a “break”. “Break” works just like “sort” and also inserts space (when grid lines is off) or inserts a line (when grid lines) is on each time the sort field changes. Let’s try a break now.
2. Switch to the Specification tab and verify that the Show Gridlines feature is disabled. Change the Sort column on the City field to “Break” and run the report. Note that it is even more obvious when the city name changes because of the additional space between city groups. Reactivate the “Repeat” checkbox for the City field and run the report again. Note that even when repeating is active, the break makes the report easier to read.
3. Switch to the Specification tab and activate the Show Gridlines feature. Run the report and note that a horizontal line is drawn between each city. Turn the repeat feature off for the City field and try the report one more time. Now the line is only drawn when the city names changes. This is very, very readable. Turn the grid-lines feature off.
4. As with the basic sort, you can have compound breaks. In the DEMO company, there are insufficient records to have a meaningful break by last name. Instead, let’s insert a new field. Use the Insert Row feature to insert a

blank row after the City field. Add the field “Gender” to the report and set the Sort column to “Break”. We are now breaking by Gender within City and sorting by Last Name within Gender. Run the report and see how it looks. That is a triple sort with a double break.

5. There is a final level of sorting known as “Eject”. “Eject” works just like “Break” except that rather than insert space or a line, “Eject” starts a completely new page. To set up this example, delete the “Gender” row we added in the last step. Then set the Sort column for the City field to “Eject”. In theory, we have created a report that lists the employees in each city on a separate page. Run the report and see what you get. You will need to use the navigation features of the Document Viewer to jump through the pages, but they are there: one city of employees per page.
6. As with “Sort” and “Break” you can have compound ejects, but it is not recommended because the report is difficult to understand. It is usually preferable to have breaks and sorts within a single eject, much like our sample report.
7. You can sort documents in many, many ways. The very best way to learn more about sorting is to create the reports that you need and to try the sort features that make sense for your reports.
8. Continue with the next tutorial.

Tutorial 14.3

Using Calculations

1. The simplest type of calculation is a “count”. A “count” is a count of the number of records within a break and does not reflect the contents of a field. For example, if you count the salary for 30 employees, the count will be 30, not the sum of the salary for each employee. Let’s apply a “count” to our sample report.
2. Our sample report should have three fields, City, Last Name, and Age. There should be an “eject” on the City field and a “sort” on the Last Name field. Add a count to the City field by putting the phrase “Count” into the Calculation column. Now run the report. You will see a sub-total added under the City column (on the report) that indicates the number of records in the sort.
3. Sub-totals are provided as long as there is an “Eject” or a “Break” used in the report. Change the “Eject” to “Break” and run the report again. This time, you can see the counts for each city without needing to move between pages. Before leaving the report, scroll down to the bottom of the report and note that a “grand total” is provided for all records in the report.
4. Now change the “Break” to a “Sort” and run the report. This time there are no sub-totals because sub-totals are only included when you break or eject. If you scroll to the bottom of the report, however, you will note that a grand total is provided. Change the sort type on the City field back to “Break” and continue with the next step.

5. Now that you have learned about counts, let’s learn about the other calculation types. Without changing the calculation on the City field, add a “Minimum” calculation to the Age field. The “minimum” calculation will determine the lowest value for the field within the break. Try the report. Note that the count for the records within the city remains while a minimum age calculation is provided. Add the Age field to the report a second time at the bottom of the report and place a “maximum” calculation on this field. We should now have a report that calculates the number employees in each city and shows the minimum and maximum ages for employees within that city. You will also have learned that you can use the same field on a report more than once.
6. The next calculation to learn about is “average”. Add another row to the report using the Age field again. This time put an “average” calculation on the Age field. Run the report and you will see that we now know the average age of the employees in each city.
7. You can see that calculations can be used to provide some very interesting statistics. Our report, however, is getting redundant. If we really want to see this degree of statistics, we probably do not need to see the level of detail shown. Let’s make this statistics report into a “totals-only” report. Turn the “Print” column to off for each field in the report. This will eliminate the detail for the city name, last name, and each of the ages. Now run the report. You can see why this report is called a “totals-only” report; the only thing you can see are the totals.
8. We have one more calculation type to learn about: “total”. The “total” calculation is used to sum the contents of numeric fields. To demonstrate it, we need to modify our sample report. Delete all three Age fields. Delete the Last Name field. Reactivate printing for the City field. Finally, add the Pay Rate field and include a “total” calculation. This report can best be described as a “Salary Total by City” report. Run it and have a look. Each pay rate for each employee is shown, but the employee name is not shown for confidentiality purposes. For each city, the total salary amount has been calculated and is shown.
9. Let’s change this report to something you will need. Change the field on the first row from City to Department Name. Note that when you select a field, the default settings for Print, Repeat, Sort, Sort Order, and Calculation are inserted. Place a “break” on the Department Name field and set a “count”. Add Pay Rate to the bottom of the report so that it appears twice and set an “average” calculation. Finally, change the report to a “totals-only” report by setting the Print column off for all three fields. This report is a “Salary Statistics by Department” report. It lists the total salary burden and average salary for each department in the company. Very powerful stuff.
10. One final example will demonstrate the power of sorts and calculations. Please be aware that this report has been known to create trouble in organizations. However, we are not responsible for this trouble; we merely report the facts.

-
11. Change the field on the first row to “Gender”. Be sure to reset the “break”, deactivate printing, and set a “count”. Now delete the Pay Rate row that contains the total, but leave the Pay Rate row that contains the average. This report is now the dreaded “Average Salary by Gender” report and in an instant it will indicate “potential” pay equity issues in an organization. Run the report. The data in the DEMO company indicates relative parity among gender.
 12. If you think this last sample through, you will notice that the report does not take into account the job performed by the different genders. This report could be modified to break by gender within job code and to average the pay rate for different genders performing the same job. With that report, you would have a true indication of salary parity. Unfortunately, our time is up.
 13. This tutorial and this lesson are now complete. Exit the Adhoc Report dialog and exit People-Trak.

Notes

Lesson 15

Report Field Modifiers

This lesson demonstrates the report field modifiers that add a tremendous amount of flexibility to your reports.

Source Text

People-Trak Basics – Chapter 13

Tutorials

Date Field Modifiers: shows how to use the date field modifiers to print the individual parts of date whenever desired.

Reporting on Specific Rows: shows how to create reports that list individual rows from a grid.

Creating History Reports: shows how to use the “*” wildcard modifier to create reports that show all rows from a grid.

Using Query and Report Modifiers: demonstrates how to use query and report modifiers at the same time.

Tutorial 15.1

Using Date Field Modifiers

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select “Adhoc Report”.
3. Select the Report Definition tab and enter the following three fields: Full Name and Hire Date twice. Run the report for reference purposes. Now, let’s demonstrate the modifiers.
4. Set the modifier for the first Hire Date to “M” and run the report. The report will now list the month from each hire date.
5. Set the modifier for the first Hire Date to “D” and run the report. The report will now list the day from each hire date.
6. Set the modifier for the first Hire Date to “Y” and run the report. The report will now list the year from each hire date.
7. That’s how the modifiers work separately. Now let’s show them together. Add the Hire Date field to the report two more times. Set modifiers for the first three Hire Date fields to “M”, “D” and “Y”. Run the report. You will see each part of the date, followed by the full date.
8. The date field modifiers can be used with any date. A typical use of the date modifiers applies to the Birth Date field. You can use the date modifiers to show a persons

birthday without showing the year. Try it. Delete the Hire Date rows and replace them with two Birth Date rows. Set the first modifier to “M” and the second modifier to “D”. Set the sort field on both Birth Dates fields to “Sort”. Now run the report and you will have nicely formatted and legally correct “Birthday Report”.

9. Continue with the next tutorial

Tutorial 15.2

Reporting on Specific Rows

This tutorial shows how to create reports that list specific rows.

1. Modify the sample report by deleting the Birth Date rows added in the prior tutorial. Add four Salary Date fields. Run the report for reference purposes. All of the dates should be the same. Because the Modifier column is blank, the first salary date is shown four times.
2. Change the modifier on the second Salary Date row to “1” and run the report. The report remains the same which proves that a blank modifier is the same as the “1” modifier.
3. Change the modifier on the second Salary Date row to “2” and the modifier on the third Salary Date row to “3”. Run this report. It lets you see that you can place dates in ascending order horizontally across the page. The modifiers need not be consecutive and they need be in any order. You can list any row that you want in any order that you want.
4. Change the modifier on the third Salary Date row to “+” and run the report. The “+” modifier lists the last salary date for each employee.
5. You can report on different fields and from fields from different screens. Let’s try the simple version first by creating a report to show the Salary Date and Pay Rate for the second and third rows.
6. This report is essentially a “Recent Salary History” and might be useful. The only thing that would be nice to change is the column headings. The report would be more meaningful if the headings reflected the row number. There is a way to modify these headings, but that is the subject of another lesson. Now change the report to include recent review history. There are both salary and performance review dates in People-Trak. You might want to see both. Make your report rows look like this:

Full Name	
Salary Date	1
Change Reason	1
Salary Date	2
Change Reason	2
Review Date	1
Review Rating	1
Review Date	2
Review Rating	2

7. Run the report and you will see the two most recent salary reviews adjacent to the two most recent performance reviews. Again the report would be more useful if the headings could be changed, but we'll see about that later.
8. The type of history report produced in this tutorial works when you want to list one or two items. It does not work when you have a lot of items or a lot history. More comprehensive history reports can be produced using the "*" modifier. This modifier is demonstrated in the next tutorial.
9. Continue with the next tutorial.

Tutorial 15.3

Creating History Reports

1. Modify the sample report to include the following fields: Full Name, Salary Date, Pay Rate, Change Amount, Change Percent, and Change Reason. Place a "break" on the Full Name field, turn off repeating for the Full Name field, and verify that all modifiers are blank.
2. Run the report. The report should list the salary detail for the most current salary record. The records should be separated with a blank line due to the "break" that was inserted.
3. Now, change the modifier for each of the salary fields (everything but Full Name) to "*". The "*" modifier is a wildcard and it indicates that all records should be listed. Place a "sort" on the Salary Date field and set the sort order to "Descending". Run the report. Note that you have a nicely formatted Salary History Report. If you want each employee's salary history to be placed on a separate page, change the "break" on the Full Name field to "eject". Try it now. This is a report that WILL get used. Change the "eject" back to "break".
4. Let's create another history report using data from the Performance Review screen. Delete the salary fields and add the following fields: Review Date, Review Type, Review Rating, Next Review Date, and Next Review Type. Set the modifiers for these fields to "*" and set a "sort" on the Review Date field. Run the report. Once again, we have created a nicely formatted Performance Review History report.

Note: If you inadvertently do not set all of the modifiers to "*" on a history report, the value from the first row will be repeated for each line in the report.
5. Continue with the next tutorial.

Tutorial 15.4

Using Query and Report Modifiers

When the "*" field modifier is used in a query, one additional field modifier, "=", can be used in the report definition. This modifier will show only those rows that actually matched the query. Let's build the report.

1. Modify the sample report into a simple salary history. Delete all rows after the Full Name field and insert the Salary Date, and Pay Rate fields. Set the modifiers to "*" and set a descending "sort" on the Salary Date field. You can run the report for verification.
2. Switch to the Query tab and insert the equation shown below.

$$\text{Pay Rate} * > 3000.0000$$
3. The query equation will include all employees with at least one pay rate greater than \$3,000. The report definition will list all of the salary records for the employees who meet the minimum salary requirement. Run the report. Some employees have been excluded, but for those employees included all of their salary records are shown.
4. Change the modifiers for the salary fields on the Report Definition screen to "=". This modifier will cause the individual salary records (not the employee records) that meet the minimum salary requirement to be shown. Run the report and study it.
5. The "=" modifier triggers special processing that checks each record for each employee and causes each record that meets the query to be included. Thus, this report is no longer a full history for each employee, but rather a list of those pay rates greater than \$3,000 for each employee with at least one pay rate greater than \$3,000.
6. The "=" modifier is very, very powerful. There are many reports that can take advantage of this feature. Here's another. Consider a report that shows those performance reviews for each employee that were performed by a specific reviewer or that had a specific rating. Just use the formula outlined above.
7. This tutorial and this lesson are complete. Exit the Adhoc Report dialog and exit People-Trak.

Lesson 16

Design Mode

This lesson shows how to make changes to a report format using the Design Mode dialog.

Source Text

People-Trak Basics – Chapter 13

Tutorials

Changing Column Headings: shows how to change column headings from the defaults provided by the data entry screen to any desired value.

Changing Column Widths: shows how to change column widths from the defaults provided by the data entry screen.

Changing Font Attributes: shows how to change the default font attributes. Font size, font name, bold, italic, underscore, alignment, and color attributes can be changed.

Tutorial 16.1

Changing Column Headings

In an earlier lesson we found that some reports were not as meaningful with the default report headings. This tutorial shows how to change the column headings.

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select “Adhoc Report”.
3. On the Specification tab, confirm that auto-format has been disabled.
4. Select the Report Definition tab and enter the following four fields: Full Name and Pay Rate three times. Set the modifiers to “1”, “2”, and “+”. Run the report and you will see a mini salary history report. The problem is that the three headings for the Pay Rate fields are all the same. A person reading this report will not understand what the report is. Let’s fix that.
5. Select the Design Mode button on the Tool Bar. The Design Mode dialog is displayed. You should see your four fields spread across the grid.
6. To change a column heading, double-click on the heading itself. This will activate editing in that cell of the grid. Try it now and change the first Pay Rate heading to “Current Pay”. Change the second Pay Rate heading to “Prior Pay”. Change the third Pay Rate heading to “Starting Pay”.
7. Close the Design Mode dialog using the Exit option on the File Menu. Then run the report. Now the report is very meaningful and useful.

8. The headings that have been modified will remain modified until you change them; they are part of the report. Change the heading of the last Pay Rate field to “Initial Pay” and run the report again. That’s all there is to it.
9. If you wish to create two-row heading, you can separate the words in the heading with a backslash “\” character. If you wish to change a two-row heading to a single-row heading, replace the backslash with a space. You can try this if you wish.
10. Continue with the next tutorial.

Tutorial 16.2

Changing Column Widths

1. Change the sample report as follows. Delete the three Pay Rate fields and add Address 1, Address 2, City, State, and Zip. Run the report. Note that without auto-formatting, the width of the fields often exceed the maximum amount required. Address 2 in particular has a lot of “white space”. Let’s use Design Mode to solve the problem.
2. Select Design Mode using the Design Mode button on the Tool Bar. The default column widths are based on the widths of the field used on the data entry screens. To change a column width, move the cursor over the vertical grid line on the heading row of the grid. A special cursor is displayed. When the cursor is displayed, you can hold the mouse button down and drag the heading border in the desired direction.
3. Position the cursor on the line between Address 2 and City. Hold the mouse button down and reduce the width of Address 2 by dragging to border to the left. Release the mouse. Close the Design Mode dialog and run the report. If you have removed too much space, use Design Mode to increase it slightly. If you have not removed enough space, use Design Mode to decrease it slightly.
4. The process of changing column widths can require some trial and error. If you shrink a column too much, nothing terrible happens. The text uses word wrapping and opens the line up vertically to allow for the additional lines. In some cases, where a very small percentage of fields are wide and the rest are thin, this can be acceptable. Use Design Mode to cut the width of Address 1 in half. Run the report and note how lines are wrapped when they do not fit the space allowed. Set the width of Address 1 back to a more reasonable width.
5. If you use auto-formatting, column widths set in Design Mode are completely ignored. Column widths are set automatically by auto-format.
6. Continue with the next tutorial.

Tutorial 16.3

Changing Font Attributes

Font attributes can be changed for both the headings and the body of the text. This tutorial shows how.

1. Font attributes can be changed using word-processor like features in Design Mode. Start Design Mode and click on the heading for Full Name. Click on the Bold button on the Tool Bar to change the heading to bold text. Click on the body for the Full Name field and use the text color button on the Tool Bar to change the body color to Red. Close the Design Mode dialog and run the report. The changes will be shown as made.
2. Return to Design Mode and make these settings. Change the alignment of the City body text to right justified. Make the Zip field underlined. Center the heading for Address 1. Change the font size for State to 12. Change the font name for Full Name to anything other than what it is. Now, this is a ransom note. Run it.
3. Besides being perfectly awful, the report demonstrates what can be done with font attributes. In most cases, font attributes should be changed with discretion.
4. Fortunately, should a document ever reach “ransom note” status, you can restore the report to defaults quite easily. Start Design Mode and then select the Restore Defaults option on the File Menu. All of the settings will be instantly restored both on the Design Mode dialog and within the report itself.
5. If you use auto-formatting, all of the font attributes are honored except for the font size. Font sizes are automatically determined by auto-formatting and all font sizes are set to the same size.
6. This tutorial and this lesson are complete. Exit the Adhoc Report dialog and exit People-Trak.

Lesson 17

Query Operators and Modifiers

This lesson introduces the advanced operators used for reporting on the individual parts of telephone, date, and time fields. In addition, you will learn about modifiers that allow you to query against specific lines in grids.

Source Text

People-Trak Basics – Chapter 14

Tutorials

Using Telephone Operators: shows how to use the telephone operators to select records based on the area code, prefix, and suffix.

Using Date Operators: shows how to use the date operators to select records based on the month, day, and year parts of a date.

Using Modifiers: shows how to use modifiers to identify the specific lines within a grid for comparison purposes.

Tutorial 17.1

Using Telephone Operators

Three operators have been provided for querying against the three parts of a telephone number. Here's how to use them.

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select "Adhoc Report".
3. Select the Report Definition tab and enter the following three fields: Last Name, First Name, and Home Telephone. Place a "sort" and a "count" on the Last Name field. Run the report. All records should be included. Note the number of records in the grand total at the bottom of the report. Now, let's use the operators.
4. Select the Query tab and select the Home Telephone field for the first query row. For the operator, use "AreaCode" and for the contents, use "619". Run the report. Note that the number of records is less and that all of the telephone numbers start with "619". Change the Contents column to "858" and try the report again. There should be just one record with an area code of "858"
5. Now let's try the "Prefix" operator. Change the operator to "Prefix" and change the Contents to "744". Run the report. Again, you should only see those records that have a prefix "744". If there were records with different area codes, but the same prefix, these records would be included. If you needed to restrict the report to those records with a specific area code and a specific prefix,

you would need to use two query equations. Be patient, that's the subject of another lesson.

6. The final telephone operator, "suffix", is used to find those records that have a particular four-digit suffix. This operator will be rarely used. However, to demonstrate it, change the operator to "Suffix" and the contents to "2557". There is just one record with this suffix. Run the report and you'll see which one.
7. Continue with the next tutorial.

Tutorial 17.2

Using Date Operators

Date operators work very much like telephone operators in that they are used to compare parts of the date to specific values. Telephone operators, however, always assume that the field must "equal" the contents. Date operators provide a much wider range of comparisons. You'll see below.

1. Update the sample report by changing the Home Telephone field on the Report Definition tab to Hire Date. Then change the Home Telephone field on the Query tab to Hire Date. Now let's get started with the operators.
2. Change the operator to "MO="". This operator compares the month of the date to the numeric month value entered into the Contents column. The two must be equal. Position the cursor to the Contents field. When the special date operators are used, the edit attributes for the Contents field are switched from the date attributes to a numeric attribute of either two digits (for the month and day) or four digits (for the year). Set the contents to "9" and run the report. Note that all of the dates listed are in the month of September.
3. Change the operator to "MO<>". This operator compares the month of the date to the numeric month value entered into the Contents column. The two must not be equal. Run the report. Note that all of the dates listed are not in the month of September; records from all other applicable months are listed.
4. Change the operator to "MO>". This operator checks for records where the month in the date is greater than the value in the Contents field. Run the report. Dates listed in October, November, and December are show. Change the operator to "MO>=" to include September as well. Try it now.
5. Now try the "MO<" and "MO<=" operators to find those dates with months less than September and less than or equal to September.
6. The six operator types: equal, not equal, greater than, greater than or equal, less than, and less than or equal are also available for the day of the month and the year. Let's try one of each.
7. Set the operator to "YR>" and the contents to "1994". This will list those employees hired during and since the year 1994. Run the report to see for yourself. Now

change the operator to “DY=” and the contents to “20” to list those employees hired on the 20th of any month.

- There are very few time fields in People-Trak, but there is a set of time operators for both the hours and minutes of a time field. These work identically to the date operators.
- Continue with the next tutorial.

Tutorial 17.3

Using Modifiers

Field modifiers apply to the grid-style data entry screens for People-Trak. On these screens, you can have multiple lines of information for each employee, applicant, etc. For example, you could have multiple salary records for a given employee. Therefore, there would be multiple Salary Dates, multiple Pay Rates, multiple Pay Frequencies, and so on. Thus, when you use fields from these grid-type screens in a query, you must tell People-Trak which line of the given screen contains the field for the query using modifiers. Here’s how to do it.

- Update the sample report by changing the Hire Date field on the Report Definition grid to “Pay Rate”. Delete any rows in the Query grid.
- Add the “Pay Rate” field to the Query grid and set the operator to “>”. Set the Contents field to “3000.0000”. In this form, the query will return the last name, first name and pay rate for each employee with a pay rate greater than \$3,000. Run it and see.
- All of the employees in the DEMO company have one or more salary history records. How do you know which of these records is being used in the comparison; you did not specify a modifier? If you do not use a modifier, it is assumed that the modifier is “1” for the first salary history record for each employee. Change the modifier to “1” and try it. You will see the same report you saw the last time because the query is identical.
- Change the operator to “<” and run the report again. This time, the report will show all employees with a first pay rate record less than \$3,000. Now, let’s look at another scenario. What if you wanted to check for employees where ANY pay rate record is less than \$3,000? You can do this by changing the modifier to “*”. The asterisk character is a wildcard. It means that the comparison process should check each and every salary history record for a pay rate less than \$3,000. Because older pay rates are typically less, we should see more records than the last time. Try it and you will see more records.

Note: the Pay Rate being printed is the pay rate for the first record (as determined by the Modifier column in the Report Definition grid) and thus may not correspond to the query. This is because the value for the first record may not be the value that actually qualified the employee to be included in the report.

- Sometimes you need to check the last record only which is actually the first record that was entered (when records in the grid are sorted descending – as recommended).

The “+” modifier is provided for this purpose. Change the modifier in the sample report to “+”. This report will now list the current (topmost) pay rate for those employees who were initially hired with a pay rate under \$3,000. Run the report to confirm this.

- Finally, there are times when you wish to compare a specific row. When you need to do this, enter the row number directly into the Modifier column. Use “2” now. This will change the meaning of our sample report as follows: show the first pay rate for each employee who has a second most recent pay rate less under \$3,000. Try the report.
- Query modifiers are not limited to pay rates. They can be used with any of the records that are tracked in grids. Let’s try another scenario. Change the Report Definition to include the “Next Review Date” field from the Performance Review screen. You can delete the Pay Rate field if you wish.
- Change the query for this report to search all performance review records for a next review date sometime greater than January 1, 2000. The equation should look like the following:
*Next Review Date * > 01-01-2000*
- Once you have the equation entered, try the report. This report will list the top most next review date for every employee who has any next review date greater than the first day of January 2000.
- Assuming that performance reviews have been entered in descending order, what operator should you use to check the current next review date? The first record can be searched identified by leaving the Modifier blank or by using “1”. If the performance reviews were entered in ascending order (newest at the bottom), what modifier would you use then? Try it and see if it works.
- This tutorial and this lesson are now complete. Exit the Adhoc Report dialog and exit People-Trak.

Lesson 18

Linking Query Equations

This lesson demonstrates how to develop multi-line queries by linking query equations. Special instructions are provided for creating standard “point-in-time” queries.

Source Text

People-Trak Basics – Chapter 14

Tutorials

Creating Multi-line Queries: shows how to refine your queries by using more than one equation.

Mixing Link Types: show how to use parenthesis to clarify equations that mix link types.

Point in Time Queries: demonstrates the standard formulate for isolating records that are active a specific point in time.

Tutorial 18.1

Creating Simple Multi-line Queries

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select “Adhoc Report”.
3. Select the Report Definition tab and enter the following three fields: Full Name, Gender, and Age.
4. Select the Query tab and enter the equation shown below.

Gender = Female

5. This is an obvious query that will list those employees with the phrase “Female” in the Gender field. Run the report for reference. Now add an “And” link to the first line and the second equation shown below.

Age > 50

6. These two equations are linked with an “And”. This means that both equations must be met and thus the only records listed should be those who are female and aged greater than 50. Run the report and see.
7. Now change the link to “Or” and run the report. What do you see? The “Or” indicates that if either equation is met, the employee will be listed. This means that females of any age will be listed and that all males and females over 50 will be listed. This is what the report demonstrates.

8. Change the query to the two-line example shown below and run the report

Age >= 30 And
Age <= 50

9. The results should list those employees with an age between 30 and 50. Nothing else matters. Switch the “And” to an “Or” and run the report again. What happens this time? Everybody shows up. Why? Because every age is either less than 50 or greater than 30.
10. From these simple examples, you can see that the “And” link tightens the filtering and the “Or” link loosens the filter. Let’s try more equations.

11. Enter the equation set below.

Gender = Female And
Age > 50 And
Last Name Starts B

12. Run the report and see what you get. There is just one record that meets all of these criteria. If we entered another equation, it would likely eliminate even this record. Conversely, if we switched all of the “And” operators to “Or” operators, the number of records would increase.
13. When used separately, multiple “And” links narrows the search while multiple “Or” links widens the search.
14. Continue with the next tutorial.

Tutorial 18.2

Mixing Link Types

In the prior tutorial, we used the two link types exclusively. That is certainly not a requirement. The link types can be mixed in any way. Here are a few working examples.

1. Modify the sample report by adding the Pay Rate field to the bottom of the Report Definition.
2. Enter the equation set below into the Query tab.
Gender = Male And
Age > 30 Or
Pay Rate > 3000.0000
3. This set combines the link types. Let’s see what we get. Run the report. This set of equations could mean: include all men older than 30 or all men with pay rates greater than \$3000. It could also mean: include men older than 30 or anyone with a pay rate greater than \$3000. In complex equation sets, the interpretations can be endless.
4. When And and Or operators are mixed in a set of equations, the equation processor evaluates the And equations from top to bottom and then the OR equations from top to bottom. In the equations above, the employee would have to be either male **And** older than 30, **Or** be any gender of any age as long as the pay rate is greater than \$3000. The interpretation that forces the employee

to be male is ruled out because the gender and age are And'ed and are evaluated before the Or statement.

- Mixing And's and Or's can be somewhat confusing. If filters of such complexity are required, they can be achieved. To simplify the reading of combined And/Or equations, the equation processor allows the use of parenthesis. Parenthesis can be used to determine the order in which the equations are to be evaluated. They are useful when And's and Or's are used together to make the equation set more explicit.

```
(Gender = Male And
Age > 30 ) Or
Pay Rate > 3000.0000
```

- The simple addition of the parenthesis to the equations used earlier makes the equations much easier to read (although they do not actually change the result). Try it and see.
- Parenthesis can also be used to override the default order in which the individual equations are to be evaluated. For example, in our sample equations, the default order may not be what is desired. If only males who are greater than 30 or who have salaries greater than \$3000 are to be included, the equations would be entered this way.

```
Gender = Male And
(Age > 30 Or
Pay Rate > 3000.0000)
```

- By changing the parenthesis, the Gender = Male equation is actually And'ed against the result of the age and salary "Or" comparison. Try this change and run the report.
- Continue with the next tutorial.

Tutorial 18.3 Point in Time Queries

Many times it is necessary to determine which records were active at a given point in time. It takes four equations to isolate a point in time. Here they are in plain English.

- Active prior to 'date in time' AND
- Still active OR
- Active prior to 'date in time' AND
- No longer active

Let's translate these equations into something we can use in People-Trak. We will assume that we wish to know all of the employees active on January 1, 1995.

- Update the sample report to show the Full Name, Hire Date, and Active fields. Clear all current equations in the Query tab.

- Enter the equation shown below.

```
Hire Date <= 01-01-1995
```

- This equation provides a list of those employees hired before January 1, 1995. Run the report. The report

should indicate that we are on right track. Now to limit the employees to those who are still active, add the equation show below. Do not forget to add an "And" on the first equation.

```
Active = Yes
```

- Run the report. This report now includes only those employees who were hired before January 1, 1995, but it has excluded those were hired prior to that date and terminated at some point prior to today. Thus, we need to expand the criteria to include those who are no longer active. It takes the following two equations.

```
Hire Date <= 01-01-1995 And
Termination Date >= 01-01-1995
```

- Add these equations and include an "Or" on line two. We now have two pairs of equations linked by an "Or" as shown below.

```
Hire Date <= 01-01-1995 And
Active = Yes Or
Hire Date <= 01-01-1995 And
Termination Date >= 01-01-1995
```

- Run the report. It should look good. However, to ensure the results, combine the first two equations with open and close parenthesis and combine the third and fourth equations within parenthesis. This is shown below.

```
(Hire Date <= 01-01-1995 And
Active = Yes) Or
(Hire Date <= 01-01-1995 And
Termination Date >= 01-01-1995)
```

- Run this report and you will obtain the results desired. The point in time formula can be used over and over again. You can change the actual date to any date or a date range. To set a date range simply move the terminate date forward in time to expand the period during which an employee can be active.
- This tutorial and this lesson are complete. Exit the Adhoc Report dialog and exit People-Trak.

Lesson 19

Date Variable Substitution

This lesson describes how to use date variables to make reports more versatile and more flexible.

Source Text

People-Trak Basics – Chapter 14

Tutorials

Entering Date Variables: shows how to use the Date Variable popup to select date variables for use in the Contents column of the Query grid.

Performance Reviews Due Example: demonstrates a “real-world” example of how to use the date substitution variables.

Tutorial 19.1

Entering Date Variables

Date variables cannot be keyed directly into the Contents column. They must be selected from the Date Variable table. Here is how to do it.

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option from the Documents menu. Start a new document using the New Document button on the Tool Bar. When list of document types is displayed, select “Adhoc Report”.
3. Select the Report Definition tab and enter the following fields: Full Name and Hire Date.
4. Select the Query tab and enter “Hire Date” as the first field. Set the operator to “>”. At the Contents column, click on the popup button.
5. A dialog box with three buttons is displayed. The first button is used to select a fixed date from a calendar. The second button is used to select a date variable from a list of variables. The third button is used to cancel the process. Select the second button. The list of date variables is displayed.
6. Select the variable “START-OF-PRIOR-YEAR”. The equation will now select those employees with a hire date since the start of last year. Run the report. If there are any employees with hire dates since the start of last year, they will be listed.
7. Set the “And” link on the first row. Then add “Hire Date” on the second row. Set the operator to “<”. Use the Date Variable table to select the variable “END-OF-PRIOR-YEAR”. This sample report will now list those employees with a hire date between the start of last year and the end of last year.
8. If this report is run at 11:59 PM on December 31, 2002, the report will include those employees hired during

2001. If this report is run just two minutes later at 12:01 AM on January 1, 2003, it will include those employees hired during 2002.

9. Exit the Adhoc Reports dialog and continue with the next tutorial.

Tutorial 19.2

Performance Reviews Due Example

This tutorial guides you through the creation of a “real world” report: a performance review due report. The report will be demonstrated for various date periods.

1. Look up three records and modify the topmost Next Review Date field for each record to a date five days from now.
2. Create a new adhoc report and use the title “Performance Reviews Due”. Enter the following three fields in the Report Definition: Department Name, Full Name, and Next Review Date. Set an “Eject” sort on the Department field. Set a “sort on Full Name. Set a “sort” on the Next Review Date, but use descending order. Set the “*” modifier on the Next Review Date.
3. Test the report. The report should list all next reviews for each employee sorted by next review date. Each time the Department Name field changes, a new page will start. This report is designed for distribution to each manager with a list of the employees who are due for reviews over a specified period. At this point, the report includes all employees and all reviews. Let’s correct that with a query.
4. One typical version of this report is run at the end of each week and is designed to list the performance reviews due the following week. It would use the equations listed below.

```
Next Review Date * >= START-OF-NEXT- WEEK
Next Review Date * <= END-OF-NEXT-WEEK
```

5. Enter the equations and try the report. If the next review dates you set are next week, they will show up in this report. If they do not show up, change the equations to use “START-OF-WEEK” and “END-OF-WEEK”. Then they will show up. This report has an error. It shows all next reviews for any employee who has a review due next week. Change the modifier for the Next Review Date field on the Report Definition to “=”. Now the report will work fine.
6. This basic report can be modified to produce reports that look ahead over any of the available periods. The most useful for performance reviews are the next month, and the next 30 days. The appropriate equations are shown below.

```
Next Review Date * >= START-OF-NEXT- MONTH And
Next Review Date * <= END-OF-NEXT-MONTH
```

*Next Review Date * >= TODAY* *And*
*Next Review Date * <= THIRTY-DAYS-FORWARD*

7. Note that the second pair of equations make use of the TODAY variable to start the 30 day period from today through a day 30 days from now.
8. Another useful variation of this report is a version that looks backward for a topmost next review that is prior to today. This would represent reviews that were scheduled and not performed. To create this report, you would change the query modifier to blank or "1" and then set the date variables to START/END-OF-PRIOR-WEEK or START/END-OF-PRIOR-MONTH.
9. This tutorial and this lesson are complete. Exit the Adhoc Report dialog and exit

Lesson 20

Advanced Lookup and Favorites

This lesson shows you how to use the advanced features of the Lookup dialog. In an earlier lesson, you learned about basic lookup. This lesson demonstrates the rest of the dialog.

Source Text

People-Trak Basics – Chapter 14

Tutorials

Creating Custom Queries: shows how to use the Custom tab on the Lookup dialog to perform lookups using single-line query equations.

Creating a Favorite: shows how to create a favorite in the Document Explorer for use in the Lookup dialog.

Using Favorites: shows how to use the favorite that was created in the prior tutorial.. Also demonstrates how to use the query equations from the favorite for an advanced lookup.

Tutorial 20.1

Creating Custom Queries

The Custom tab on the Lookup dialog is used to lookup records using a simple single-line equation.

1. Start People-Trak and select the Personnel Module.
2. Select the Open Employee option from the Tool Bar to start a Lookup. Select the Custom tab. The custom tab contains three fields: Field Name, Operator, and Contents. These three fields are used to perform single line queries for record lookups.
3. Position the cursor to the Field Name field. This field is supported by the Fields popup. You can enter a field if you know it by name or you can select the field from the popup. Enter "City".
4. The cursor is positioned to the Operator field. This field is supported by the Operators table in the same way that the Query grid is. The valid operators are determined by the field type. Enter the "=" operator.
5. The cursor is positioned to the Contents field. This field takes on the edit attributes of the field specified. For the "City" field, this means that the Contents field is supported by the City table. Select any city from the table.
6. Click on the Search button to start the search. The list box shows all of the records that match your query. You can select any record from the list or you can start another query. Instead of selecting a record, use the Clear button to clear the query.

7. Return to the Custom tab. Enter the following query. "Hire Date > 01-01-2000". Note that the Contents column takes on the edit characteristics of a date field. Perform the lookup and then cancel the lookup.
8. Continue with the next tutorial.

Tutorial 20.2

Creating a Favorite

Favorites are queries that you create and save. A favorite is essentially a named query that you can recall when performing a lookup. This tutorial shows how to create a favorite.

1. Select the Document Explorer from the Documents menu.
2. Select the New Document option from the Tool Bar of the Document Explorer. Select "Lookup" as the document type. The Lookup dialog (the dialog used for creating lookup documents) is displayed.
3. Enter "My Favorite" in the Specification Name field.
4. On the Query tab, enter the following set of equations.

<i>Gender</i>	=	<i>Male</i>	<i>And</i>
<i>(Age</i>	>	<i>30</i>	<i>Or</i>
<i>Pay Rate</i>	>	<i>3000.0000</i>)
5. You will recall that this set was used in an earlier lesson. Test the query using the Run button on the Tool Bar. The test is a report that uses the standard lookup fields.
6. Exit the Lookup dialog and save the favorite. Close Document Explorer.
7. Continue with the next tutorial.

Tutorial 20.3

Using Favorites

This tutorial shows how to use favorites. As an example, we will use the favorite created in the prior tutorial.

1. Select the Open Employee button on the Tool Bar to start the lookup process. When the Lookup dialog is displayed, select the Favorites tab.
2. The listbox on the Favorites tab shows all of the favorites that you have created. At the present time, the only favorite will be the favorite named "My Favorite" that we just created in the previous lesson.
3. Click on "My Favorite" to select the favorite. Then click on the Search button to perform the query associated with the favorite. The list of records presented should match the test report run when the favorite was created. In the future, additional records may be present as records change and then match the criteria of the query. The query associated with a favorite is dynamic. The query equations are executed when the favorite is processed.

-
4. The results of a favorite are the same as the results of any lookup. You can select any record and return the entire group for editing.
 5. The query associated with a favorite can be modified “on the fly” if desired. When a favorite is executed, the query equations from the Lookup document are moved into the grid on the Advanced tab. (You do not normally see these because you are positioned to the Favorites tab.) If you wish to make an adhoc change to the query and to select records again, you can do so.
 6. Position to the Advanced tab and you will see the query equations that you entered when you created the favorite. Modify the first line to look for “Female” instead of “Male”. Click on the Search button to perform the lookup. The list of records will change to reflect the new query.
 7. The query equations associated with the favorite are not changed. We are merely taking advantage of the fact that the equations are loaded into the grid on the Advanced tab just as if they had been keyed by hand.
 8. This tutorial and this lesson are complete. Exit the Lookup dialog and exit People-Trak.

Lesson 21

Letter and Label Templates

This lesson shows how to use the Template Manager to create and modify templates. It also shows how to create documents from a template and a query.

Source Text

People-Trak Basics – Chapter 15

Tutorials

Select and Modify and Existing Template: shows how to select an existing template and how to modify it.

Create a Label Template: shows how to create a new label template from scratch.

Create and Print a Label Document: shows how to create a document from a label template and a query. Also demonstrates how to make a copy of a document.

Tutorial 21.1

Select and Modify an Existing Template

1. Start People-Trak and select the Personnel Module.
2. Select the Template Manager from the Documents menu. The sample templates are all listed in the “blank” category. Locate the “Address Label – Avery 5160” template and select it for editing.
3. Change the category to “Address Labels”.
4. Start the text editor using the Edit Template button on the Tool Bar. When the text editor is displayed, note that the edit area has been sized to match Avery 5160 label.
5. This label contains no literal text. It contains only fields. The fields are indicated by the ~F~ placeholders. Move the mouse cursor over one of the placeholders. The cursor icon will switch to an up arrow whenever you hover over a placeholder. You can use this feature to identify (and to optionally change) an existing field in a template. Try it now. Hover the cursor over the first placeholder and then double-click. The Field Information dialog is displayed. It shows the name of the field and any applicable modifier. Close the dialog and try another field.
6. You can also show all of the fields at once. Use the Show Fields option on the Fields menu to display the field names. From the field names, it is clear that this is an address label. Use the Show Fields option to change the field names back to placeholders. Now, let’s add the Country field to the label template.
7. Position the cursor to the first line after the last placeholder. (If you get stuck inside of a field, use the

Arrow Key to position to the first character outside of the field). Use the Insert Field option on the Fields menu to display the Field Information dialog.

8. Use the popup button next to the Field Name to display the Fields popup. Select the Country field and close the dialog. The national address label has now been switched to an international address label.
9. Close the text editor and close the Label Template dialog. We changed the category of the label and you will note that the Template Manager now reflects the change. There is a new category and the template listed in that category is the template we just modified. Now, let’s take a quick look at a more complex template.
10. Locate the “Attendance Balances with History” template and select the template using the Open Template button. Then select the Edit Template button (a red exclamation point) to show the template in the text editor. This template is a full-page template that uses tables and hundreds of individual fields. It is just a sample of what can be created.
11. Close the text editor and the template. Leave the Template Manager dialog displayed.
12. Continue with the next tutorial.

Tutorial 21.2

Create a Label Template

In the last tutorial, you learned how to view and modify an existing template. In this lesson, you’ll create a template from scratch. Let’s get started.

1. Select the New Template button on the Tool Bar. When the Select Template dialog is displayed, select “Label”. The Label Template dialog is displayed.
2. At the Template Name field, enter “My Big Label Template”.
3. At the Category field, enter “Address Labels”.
4. The Label Type field is used to select an Avery label type to be used with the template. The field is supported by a table listing the types. Select the “Avery 5164”. This is a somewhat larger label.
5. Use the Edit Template button to start the Text Editor. When the Text Editor is displayed, editable area is sized to reflect the actual size of the label.
6. Because this is a large label, change the font size to 14.
7. Use the ENTER key to move the cursor down two lines. Now let’s insert a field. Use the Insert Field button on the Tool Bar or the Insert Field button on the Fields menu to start the process. When the Field Information dialog is displayed, select the “Full Name” field.
8. On the next line, insert the “Address 1” field.
9. On the third line, insert the “Address 2” field.

10. On the fourth line, insert the “City, State, Zip” derived field.
11. To customize our large label, change the font attributes on the “Address 1” to Bold, Italic, and Underline. You can do this by selecting the field and then setting the attribute.
12. Finally, to show that a template can contain text other than fields, add a line at the bottom of the label that says “bottom of the label”.
13. Close the editor and close the Label Template dialog. Note that there are now two labels in the Address Labels category. Close the Template Manager.
14. Continue with the next tutorial.

Tutorial 21.3

Create and Print a Label

Now that we have created a template, it is time to create a document that uses that template.

1. Select the Document Explorer from the Documents menu.
2. Select the New Document button from the Tool Bar to start a new document. Select the “Label” type from the Select Document Type dialog when it is displayed. The Label dialog is displayed.
3. Set the Document Title field to “Document using Big Label Template”
4. Select any desired category.
5. Now at the Template Name field, use the popup to locate and select the template we just created. Leave the Sort fields blank for the moment.
6. Now run the “Big” label. You should have multiple pages with four labels per page. Move through the pages and enjoy your big label. It is truly something “big”.
7. Close the Document Viewer and add a sort field. Use “Last Name”. Now run the labels again.
8. Your big labels are now listed in order by last name. That’s even a bigger accomplishment.
9. Now, let’s add a query. Add an equation that will list those employees who have really big pay rates. Try the following:

$$\text{Pay Rate} > 5000.0000$$
10. Run the report. The number of big labels is now smaller because there are fewer employees with pay rates greater than \$5000.
11. Close the Label dialog and return to the Document Explorer. Find your “big” document highlight it. Use the Copy button on the Tool Bar to copy your document and then use the Paste button to put that copy into the Document Explorer. There will now be an identical copy of the document with the phrase “Copy of” in front of it.

12. Select the copy and change the Document Title field to “Document 2 using Big Label Template”. Then, change the query to look for employees who have pay rates less than \$5000. Run the document to test it and then save it and return to the Document Explorer.
13. You now know how two separate documents that use the same template. Because a document is composed of a template and query, these are not the same document because they have a different query. You can create other documents that use your “big” template as well. Each document will be unique.
14. This tutorial and this lesson are now complete. Close the Document Explorer and close People-Trak.

Lesson 22

Advanced Editing

This lesson shows how to use the advanced features of the Text Editor. This includes images, headers and footers, and tables.

Source Text

People-Trak Basics – Chapter 16

Tutorials

Create a Letter Template: shows how to create a basic letter template. This includes setting page margins.

Add a Header and Footer: shows how to add a header and footer to a letter template.

Insert an Image: shows how to insert one or more images into a letter template.

Add a Table: shows how to add a table to a letter template and how to add merge fields to the columns in the table.

Tutorial 22.1

Create a Letter Template

1. Start People-Trak and select the Personnel Module.
2. Select the Template Manager from the Documents menu. Select the New Template button on the Tool Bar. When the Select Template dialog is displayed, select “Letter”. The Letter Template dialog is displayed.
3. At the Template Name field, enter “My Special Letter”.
4. At the Category field, enter “Special Letters”.
5. Use the Edit Template button to start the Text Editor. When the Text Editor is displayed, editable area is sized like a word processor for full-page documents.
6. The default page margins are one-half inch on all four sides. This is generally too small for most letters. Select the Page Setup option from the File Menu. The Page Setup dialog is then displayed. Change left, right, top, and bottom margins to one inch. When you close the dialog, note that the ruler bar is updated to reflect the new settings.
7. When you first enter a new letter, the default font is Arial and default font size is 11. Use the appropriate dropdowns on the Tool Bar to change the font to Times Roman and the font size to 12.
8. Type in the following paragraph.

This is my sample letter. In this letter, I will learn how to set margins, add a header and footer, insert images, and add tables. I am very excited to learn about these things.

9. Continue with the next tutorial.

Tutorial 22.2

Add a Header and Footer

Headers and footers can only be viewed and edited when you are in Page Layout or Centered Page Layout mode. You can insert a header or footer while in Normal mode, but you cannot see or change the header or footer. Thus, it is good practice to switch to Page Layout mode when you wish to work with headers and footers.

1. Use the View Menu to place the editor in Page Layout or Centered Page Layout mode.
2. Use the Header option on the Insert Menu to create a header. Note that the text of the header simply states “Header”. This is a placeholder and you will need to change the header text to the desired phrase. Use the mouse to click on the phrase “Header”. The cursor will be positioned into the header editing area and you can now edit the header.
3. Change the phrase from “Header” to “Sample Letter”. Whenever you are positioned to either the header or footer editing areas, the various editing and formatting options on the Tool Bars apply to the text in that area and not to the main editing area. Thus, if you wished to right justify the header (it is currently left justified), you can do so using the Right Justify button on the Tool Bar. Try it now. Click the Right Justify button to cause the phrase “Sample Letter” to be right justified within your header.
4. Change the font attributes of the “Sample Letter” phrase to Bold and Underline using the appropriate buttons on the Tool Bar. (You will need to highlight the text first).
5. Return to the main editing area by clicking outside the header area. Any actions now performed using the Tool Bar buttons will apply to the main editing area. Now let’s insert a footer.
6. Scroll the editing area so that bottom portion of the page is visible. Use the Footer option on the Insert Menu to create a footer. Note that the text of the footer simply states “Footer”. As with the header, this is a placeholder that you can change to any desired phrase. Change the phrase to “Page: “. Now we’ll see how to add page numbers to this footer (and thus to any header or footer you create).
7. Verify that the cursor is just to the right of the “Page: “ phrase. Use the Page Number option on the Insert Menu to insert a page number at that location. You will see the number “1” displayed. The number “1” is not a literal; it is a variable. The “1” is showing because you are on the first page of your letter. The number will automatically increment with each page of the letter. Now let’s format the page number.
8. Use the Font and Font Size dropdowns to change the Font to Arial and the size to 10. Then, highlight the page number portion of the phrase and make it Bold.
9. Click on the main editing area to exit the Footer area.

10. Continue with the next tutorial.

Tutorial 22.3

Insert an Image

1. Position the cursor to a line just below the paragraph that you typed.
2. Use the Insert Picture option on the Insert Menu to activate the Select File dialog. This dialog is used to select image files.
3. Use the Select File dialog to locate the folder in which People-Trak is installed. Locate the Help folder beneath the People-Trak folder and then locate the UG_Files folder beneath the Help Folder.
4. Select the IMAGE002.JPG file. The picture contained in this file will be displayed in your letter.
5. Once an image has been inserted into your letter, you can move the image around just as if it were a large character. For example, if you wish to move the image down, you can do so by inserting lines above the image. Try it now. Position the cursor on the line above the image and press the ENTER key a few times. Note that the image moves down. Now delete some of the blank lines and the image will move back up.
6. The image can also be aligned just like text. Select the image by clicking on it. Then use the Right Justify button to align the image with the right margin. Then try the Center button to align the image between the margins. Finally, use the Left Justify button to align the image with the left margin.
7. The image can also be moved around with tabs. Position the cursor on the line immediately above the image. Then use the DOWN ARROW key to position the cursor to the image without actually selecting the image. Now use the TAB key to push the image to the right. The image will align with the next tab stop shown on the Ruler Bar.
8. Now let's see how to delete the image. Select the image by clicking on the image with the mouse. Then, press the Delete key and the image will be deleted. That's all there is to deleting an image.
9. Now, use the techniques used above to select the image again.
10. Continue with the next tutorial.

Tutorial 22.4

Add a Table

A table can be inserted at any point within a document, except within an existing table.

1. Position the cursor to a blank line below the image that you have inserted in the prior tutorial.
2. Select the Insert option from the Tables menu and then specify "Table" to insert a new table. The Table Attributes dialog is displayed. This dialog is used to specify the number of rows and columns. Specify ten rows and four columns.
3. When you have specified, the rows and columns, the table will be inserted into the letter. Note that an additional caption row was added and that captions were inserted for you. This feature speeds the process of adding caption rows considerably.
4. We are going to create Skills Inventory table on this letter. Change the captions to the following phrases: Skill, Skill Date, Skill Level, and Skill Comment. In addition, change the alignment of the caption phrases from Left Justified to Centered. You can do this one caption at a time or you can select the entire caption row and do it all at once.
5. Now we need to insert the merge fields. This looks like a daunting task as there are 40 separate fields to insert, but there is a very nice feature in People-Trak that will make this task quite easy.
6. Position the cursor to the first column on the first blank row. Use the Insert Field option on the Fields Menu or the Insert Field button on the Tool Bar to display the Field Information dialog. Use the Field Popup to select the "Skill Description" field from the Skills screen. The cursor is then positioned to the Modifier field
7. At this point, you would normally wish to specify a modifier to indicate the first skill because this is the first row. However, you can take advantage of the "Autoset" feature within People-Trak by leaving the Modifier field blank. Use the "OK" button to close the dialog. People-Trak automatically detects that you are inserting fields into a table and provides the following prompt.

Autoset the Column?
8. Select "Yes" and see what happens. The entire column is populated with the "Skill Description" field and the modifiers are automatically sequenced from one to the highest numbered row in the table. You can check this by double-clicking on any of the fields. When the Field Information dialog is displayed, you can see that the both the field name and the appropriate modifier have been supplied.
9. Repeat this process for the second column using the "Skill Date" field. Then complete column three using "Skill Level" and column four using "Skill Comment".

-
10. Now let's see how this letter works. Close the editor using the Exit option on the File Menu. Then close the Letter Template dialog and the Template Manager.
 11. Select Donald Stern for editing. Use the Letters option on the File Menu to display the list of letters. Select the letter we just create "My Special Letter" and run it for the current record (Donald Stern) only. You should see your header and footer, the image you inserted, and the Skills Inventory table you added. This letter, as you have created it, is not entirely useful unto itself, but you now know how to use many of the powerful features of the Letter/Label editor.
 12. This tutorial and this lesson are now complete. Close the current record and exit People-Trak.

Notes

4

Advanced Features

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Notes

Lesson 23

Other Document Types

This lesson demonstrates how to use the export feature to export data for use in other products and application tools. It also includes instructions for importing files into People-Trak that have been created from other applications.

Source Text

People-Trak Basics – Chapter 17

Tutorials

Export an Address List: demonstrates how to export a list of names and addresses for use in creating address labels with another product.

Export a Birthday List: shows how to export portions of months using the month and day modifiers.

Export Compensation History: shows how to export multiple records per employee.

Tutorial 23.1

Export an Address List

Many products can import tab-delimited files. In this tutorial, we will create a tab-delimited file containing the name and address for each employee. Such a file might be used with a fancy label creation program. We will use Microsoft Excel to verify the results of the files we create.

1. Start People-Trak and select the Personnel Module.
2. Select the Document Explorer option. To begin a new export, use the New Document button on the Tool Bar or the New Document option on the File Menu. A list of the different kinds of documents will appear. Select Export and click OK. The Export dialog box is displayed. The cursor will be positioned to the Document Title field on the Specification tab.

3. Complete the fields on the Specification Tab as shown below.

Document Title:	Test Export
Category:	AAA
Delimiter:	Tab
Export Path:	C:\PEOPLETRAK\
Export File:	TEST.TXT
Sort By:	Last Name
Include Header:	Yes

4. Switch to the Fields tab. Enter the following fields in the order shown.

Full Name
Address 1
Address 2
City

State
Zip

5. When the fields have been entered, use the Run button on the Toolbar or the Run option on the File Menu to create the export file. When the document is complete, a message is shown in the Document Viewer. Close the Document Viewer.
6. Without closing People-Trak, start Microsoft Excel and open the file you have just created. The file will be named TEST.TXT and will be stored in the "C:\PEOPLETRAK" folder.
7. When you open the file, Excel will determine that the file is not a standard Excel file and will prompt for additional information using the Text Import Wizard. Accept the defaults that Excel presents until the file is displayed in Excel. The name and address records are listed alphabetically by last name. The columns are ordered in the order in which the fields were listed on the Fields tab. The field names have been included as the first line in the Excel spreadsheet.
8. Close the Excel file and do not bother to save it. Now change the "Include Header" checkbox to indicate that header fields should not be included. Run the export again. When complete, open the file in Excel and note that the header is no longer included.
9. Close the Excel file. This time, change the sort field from "Last Name" to "City". Run the export and open the file in Excel. This time the records are listed by city not last name.
10. Close the Excel file. Change the "Include Header" checkbox to indicate that the header fields should again be included. Add the "Employee ID" field to the bottom of the list of fields and run the Export again. When you open the file in Excel, you will see that the Employee ID field has been added as the last column.
11. Find the row for Donald Stern and change his employee ID to "9999". Find the record for Jonathan Strauss and change his address to "XXX". Save the file in the C:\PEOPLETRAK folder as "TEST2.TXT" because we are going to use this file in a later tutorial.
12. Close Excel and change the sort field back to "Last Name". Continue with the next tutorial.

Tutorial 23.2

Export a Birthday List

Export works very much like Adhoc Reports. You can use modifiers to specify which information you would like to export. In this example, we will export the parts of the birth date.

1. On the Fields tab, delete each of the fields except the first field. Then add the Birth Date field four times.
2. For the first Birth Date field, set the modifier to "M" for month. For the second Birth Date field, set the modifier

to “D” for day. For the third Birth Date field, set the modifier to “Y” for year. Leave the modifier for the fourth Birth Date field blank.

- Run the Export and then open the export file in Excel. Note that the month of the birth date is shown for the first Birth Date field, the day of the birth date is shown for the second Birth Date field, and the year of the birth date is shown for the third Birth Date field. The fourth Birth Date field is shown completely so that you can see that the month, day, and year have been extracted correctly. Close the Excel file.
- When you export a file, the query feature works just as it does elsewhere in People-Trak. Let’s demonstrate this. Move to the Query tab. Enter the query equation shown below.

Birth Date *MO*> 6

- This equation will list all records that have birth date in the months July through December. Run the export. When complete, open the file in Excel. You will see that that only those records with birth months greater than 6 are included.
- Close the Excel file. Delete the query equation you just entered. Continue with the next tutorial.

Tutorial 23.3

Export Compensation History

- On the Fields tab, delete each of the Birth Date fields. Then, add the fields shown below. Note that the asterisk has been added as a modifier for each of these fields.

Salary Date	*
Pay Rate	*
Annual Pay	*
Change Amount	*
Change Percent	*

- Run the Export and then open the export file in Excel. Note that the salary detail for each of the salary records for each employee has been exported. You can use the “*” modifier to export detail whenever desired. Close the Excel file.
- Export can also use the query option to limit those lines that are to be exported for each employee. Let’s demonstrate this feature. Move to the Query tab. Enter the query equation shown below.

Pay Rate * > 5000

- Then change the “*” modifiers for the fields on the Fields tab to “=”.
- Run the Export and then open the export file in Excel. Only those records for each employee that have a pay rate greater than 5000 are included.

- The examples above export detail vertically with multiple records per employee. If you wish to export compensation history horizontally, change the fields on the Fields tab as shown below.

Full Name Backward	
Salary Date	1
Pay Rate	1
Salary Date	2
Pay Rate	2
Salary Date	3
Pay Rate	3

- Run the Export and then open the export file in Excel. The first three compensation dates and amounts are shown left to right. There is a single compensation record per employee. Close the Excel file.
- Close the Export dialog and continue with the next tutorial.

Tutorial 23.4

Standard Reports

Standard Reports are those reports that have a pre-defined format. You can determine what records are to be included in the report, but you cannot change what the report looks like. Let show how to create a standard report.

- From the Document Explorer, start a new document using either the New button on the Toolbar or the New Document option on the File Menu.
- When the list of document types is displayed, select “Standard Report”. On the Standard Report dialog, name the report “My Gender Graph” and put it into the “AAA” category. Leave the Comment field blank.
- A standard report document is composed of a standard report template and a query (which could be blank.). Thus, we must select report template at the Standard Report field.
- Use the popup button to display a list of the existing report templates. Select the “Workforce Distribution by Gender” template. Now, let’s complete the document by adding a query.
- Position to the Query tab and enter the simple equation shown below.

Active = Y

- This query will limit the employees in the report to those that are currently active. Now run the report. The report is a pie chart that graphically indicates the gender makeup of the workforce.
- Close the Document Viewer and close the Standard Report dialog. Your new report should now be listed in the Document Explorer in the “AAA” category.
- This tutorial and this lesson are complete. Exit People-Trak.

Lesson 24

Workflows

This lesson shows how to modify one of the supplied workflows and how to create a new workflow from scratch.

Source Text

People-Trak Basics – Chapter 18

Tutorials

Modify a Workflow: demonstrates the techniques used to modify one of the supplied workflows.

Create a New Workflow: shows how to create a new workflow from scratch.

Deactivate a Workflow: demonstrates how to deactivate an existing workflow so that it can be removed from the Activities menu.

Tutorial 24.1

Modify a Workflow

1. Start People-Trak and select the Personnel Module.
2. Select the Build Workflow option from the Tools menu. The Build Workflow dialog is displayed. This dialog is used to maintain the six separate workflows that are available in each module. The grid on the left is used to name and activate the workflows. The list box on the right is used to specify the fields that will be used in the currently selected workflow. Now let's change a workflow.
3. Verify that the Address workflow is highlighted. Let's assume that your organization is purely domestic and does not require the "Country" field in this workflow. Position the cursor to the "Country" field in the list box. Then press the Delete button to delete the field. This change will take effect immediately. We'll prove it.
4. Close and save the change using the Exit option on the File menu. Select the Address workflow from the Activities menu. Note that the "Country" field is gone. Close the workflow and return to the Build Workflow dialog.
5. It is just as easy to add fields to a workflow as it is to delete them. On the Address workflow, position to the first blank row in the list box and click on the Add button. Use the field lookup feature to select the "Company Code" field from the Personal screen. Close and save the change and then confirm that the field is now on the actual workflow dialog. It should be the last field displayed. Close the workflow and return to the Build Workflow dialog.
6. Let's now assume that we wish to change the order of the fields on the Address workflow. In particular, we would

like the "Company Code" field to be the first field, not the last field. Position the cursor to the "Company Code" field and use the UP button to bump the field up until it is the first field. Again, close and save the change and then confirm the change on the Address workflow dialog. It should now be the first field (after the Employee ID and Last Name). Close the workflow and return to the Build Workflow dialog.

7. Thus far, the fields on the Address workflow have all been taken from the Personal screen. This is not a requirement; you can select fields from any screen. The following changes do make a coherent workflow, but they will demonstrate the capabilities of workflows. Add the following fields to the bottom of the workflow.

Active	(Status Screen)
Pay Rate	(Compensation Screen)
Next Review Date	(Performance Reviews Screen)

8. When complete, close and save the changes. Select the Address workflow from the Activities menu and select a record. Note that the values collected from four separate screens are displayed in one location. Change the fields and then save the changes. Then use the Lookup dialog to select the record and confirm that the changes have indeed been made across these screens. Close the record.
9. When using fields from a grid (such as Pay Rate and Next Review Date), you have the option of specifying any row in the grid. For example, if you wanted to see the pay rate from the second row, or the next review date from the third row, you can do so. Here's how.
10. Return to the Build Workflow dialog and select the "Pay Rate" field on the Address workflow. Click on the Add button to start editing the field. Skip over the field name and position the cursor to the "Modifier" field. Enter a "2" and close the Field Information dialog. Likewise, select the "Next Review Date" field and change the modifier to "3". Close and save the changes to the workflow.
11. Open the Address workflow on the Activities menu. Note that there is a number in parenthesis adjacent to the screen caption for the "Pay Rate" and "Next Review Date" fields. This number indicates the respective row number from which the data will be retrieved and optionally restored if you make a change. Select a record and make a change to the Pay Rate and the Next Review Date. Then save the changes and confirm them by selecting the record and checking the respective screens.
12. Continue with the next tutorial.

Tutorial 24.2

Create a New Workflow

In the last tutorial we saw how to modify an existing workflow by deleting fields, changing field order, and adding fields. In this tutorial, we will create a workflow from scratch. Let's get started.

1. Select the Build Workflow option from the Tools menu.
2. Position the cursor to the third workflow in the grid. The name is "Workflow 3". Change the name from to "My Status Workflow". Then activate the workflow by checking the "Enabled" column. Now let's add some fields.

Active
Status
Status Date
Secondary Status
Status Comment
On LOA
Hire Date
Seniority Date
3. Add the following fields to the workflow in the order shown (they are all from the Status screen).
4. When complete, close and save the changes.
5. Open the Activities menu. Note that your workflow is now listed in the menu because it has been enabled. Select your new workflow and try it out by selecting an employee. This workflow becomes a convenient way of reviewing and/or changing status information in one location without concern for the other fields on the Status screen. This is just pure status information.
6. Change the status information for the employee you have selected and save the changes. Then, for the final time, confirm that the changes you have made in a workflow have been committed to the database and are visible on the Status screen. When complete, close the record.
7. Continue with the next tutorial.

Tutorial 24.3

Deactivate a Workflow

A workflow can be deactivated at any time. You might wish to do this when the workflow is undergoing changes or when the workflow is no longer needed. You do not need to delete all of the fields in the workflow; you simply need to deactivate it. Here's how.

1. Select the Build Workflow option from the Tools menu. Highlight the third workflow, the one you just created.
2. Disable the workflow using the Enabled checkbox. The workflow is disabled when the checkbox is not checked. Close and save the change.

3. Open the Activities menu. Now that the workflow has been disabled, it is no longer visible, even though nothing else was done to the workflow.
4. Return to the Build Workflow dialog and enable the workflow again. Close the Build Workflow dialog.
5. This tutorial and this lesson are complete. Exit People-Trak.

Lesson 25

Customization 1

This lesson demonstrates some of the customization features in People-Trak including screen captions, field names, and edit attributes.

Source Text

People-Trak Basics – Chapter 19

Tutorials

Changing the Screen Caption: demonstrates how to change a screen caption on a data entry dialog. Examples are provided for text boxes, check boxes, and grid headings.

Changing the Field Name: shows how to change the name by which the field is identified in documents and templates.

Changing Edit Attributes: demonstrates how modify field attributes such as length, case, and decimal places.

Tutorial 25.1

Changing the Screen Caption

1. Start People-Trak and select the Personnel Module.
2. Select the Field Customization option from the Tools menu. The Field Customization dialog contains a combo box with a list of the screens in the Personnel module, a list box that contains the fields on the screen shown in the combo box and a collection of text boxes and checkboxes for viewing and recording information about the current field.
3. Before we actually modify a field, let's demonstrate some of the navigation features of the dialog. First, change the screen name in the combo box from Personal to Status. Note that the list of fields displayed in the list box changes from those on the Personal screen to those on the Status screen. Also note that the fields are listed in alphabetic order and not the order in which the fields actually appear on the dialog.
4. Now open the combo box again. Note that the screens are listed in the same order that they are listed in the Screens dropdown. The sub-screens are listed after the primary screen name.
5. Select the Personal screen again and close the combo box. Note that the first field in the list box is selected and that the field information for that field is displayed. Select a different field and the field information is changed to reflect that field. That is how you navigate between screens and fields. Now let's customize.
6. Select the "Address 1" field on the Personal screen. Then position to the Screen Caption field on the dialog. Start by changing the screen caption to "Addr 1". Then use the

Exit option on the File menu to close and save your changes.

7. Open any record and display the Personal screen. Find the field formally labeled as "Address 1" and note that it is now labeled "Addr 1". That is all it takes to customize a screen caption. However, there are few more things to learn.
8. Close the record. People-Trak is an integrated solution. Customization changes made to fields are reflected throughout People-Trak including workflows and batch processing programs. Select the Address workflow from the Activities menu. Note that the screen caption for the address field has been changed to reflect your recent customization. If the address field were used in a batch processing program, the same result would occur.
9. Close the workflow and return to the Field Customization dialog. Select the Address 1 (or "Addr 1") field and position the cursor to the Screen Caption field on the dialog. Now, change the phrase "Addr 1" to "This is the field named Address 1" and attempt to leave the field. The message shown below is displayed

The new caption is wider than the space allowed

10. This message indicates that the caption you have specified will not fit in the space allowed. If you look at the Field Customization dialog, which is similar to all other dialogs, you will note that there is specific amount of space between the left most edge of the text box itself and the edge of the frame or other component that is to the left of the text box. If you specify a caption that will not fit in this space, the message shown above is displayed and your entry will be rejected.
11. At this point, set the field back to the original value of "Address 1" and continue.
12. Select the Status screen and then select the "Active" field. The "Active" field is a checkbox. Let's customize a checkbox. Change the screen caption from "Active" to "Still Working". Then close and exit the dialog box. Select a record and position to the Status screen. Note that the caption on a check box changes exactly like the caption on a text box. The space limitations that apply to text boxes also apply to check boxes as well.
13. Close the record and return to the Field Customization dialog. Select the Status History screen and position the cursor to the Screen Caption field on the dialog for the "History Status Date" field.
14. The Status History screen is a grid. When you are changing the screen caption on a grid you are actually changing the column heading for that field on the grid. Let's try it. Change the screen caption from "Date" to "Status Date". Close and exit the dialog box. Select a record and position to the Status History dialog (it is a subscreen on the Status screen). Note that caption for the "Date" column has been changed to "Status Date".

15. You have now seen how to change the screen caption for text boxes, checkboxes, and grid columns. Now you'll see how the screen caption you have learned to change interacts with the adhoc reports.
16. When you select a field for use in an adhoc report, the caption that will be used for the report is the current value of the screen caption. Let's demonstrate this.
17. Create an adhoc report containing two fields: "Full Name" and "Address 1". Give the report a name and category so you can find the report. Do not add a query. Test the report and note that the caption for the "Address 1" field is indeed "Address 1".
18. Using what you have just learned, change the screen caption for the "Address 1" field to something else. Then return to the report you have just created run it again. There will be no difference; the screen caption when the report was created was "Address 1". That caption will remain with the report unless you change the caption using the Design Mode feature.
19. Create a new report that uses the "Address 1" field. Run the report and the screen caption will now be the new value. This new caption will remain a part of this report unless you change it in Design Mode even if you do change the caption back to "Address 1" with the Field Customization dialog.
20. Continue with the next tutorial.

Tutorial 25.2

Changing the Field Name

The "Field Name" for a field is what you use when you reference the field in various places throughout People-Trak. For example, when you search for a field to use in an adhoc report, you look for the field, not the screen caption you learned about in the last tutorial.

The field name can be changed when desired. This is typically necessary when you change the use of a field (often including the screen caption) and need to look for the field by a name that reflects its use. For example, if you change the "Payroll Number" field on the Personal screen to be used as the "Department Name", you would change both the screen caption and the field name. You would not want to select "Payroll Number" when you meant to use "Department Name". Let's change a field name now.

1. Select the Field Customization option on the Tools menu. Position to the Personal screen and select the "Payroll Number" field. Change the field name and the screen caption from "Payroll Number" to "Dept. Name". Close the dialog and save the changes. Then verify that the change has been made on the Personal screen. Finally, return to the Field Customization dialog.
2. Look for the "Payroll Number" field in the list of fields on the Personal Screen. You will not find the field, because it's name has been changed. The field will now be listed as "Dept. Name" in appropriate alphabetic order

on the screen. This same thing will be true when you attempt to select fields for query or reporting.

3. Close the Field Customization dialog and select the Lookup dialog. Position to the Custom tab. At "Field Name" use the popup to display the list of fields. Scroll down the list of fields for the Personal screen. The "Payroll Number" field will no longer be there; it has been changed to "Dept. Name"
4. Close the Lookup dialog. We will now see how these changes are reflected in adhoc reports.
5. Open the report that you created in the prior lesson. Add the Department Name field from the Personal screen to the report. Test the report. Note that the screen caption reflects the change. Save the report and then return to the report. Note that the field name is "Department Name". Close the report.
6. Use the Field Customization feature to change the field name and the screen caption back to "Payroll Number" and then return to this report. What has happened to the field name? It has been changed back to "Payroll Number". Reports and other documents actually save the field ID. At the time the report is opened, the field ID is used to retrieve the current field name. If you add a field to the report, the field name is displayed, but when the report is saved, the field ID is actually stored. This feature enables you to change fields without concern for reports that have already been created.
7. Run the report. The screen caption is not changed because as we have demonstrated above, the screen caption does not change dynamically. You must use Design Mode to change a caption once the field has been selected.
8. Close the report and continue with the next tutorial.

Tutorial 25.3

Changing Edit Attributes

Fields have a number of attributes such as length, edit criteria, and format. In this tutorial, we will show how to change these.

1. The most obvious attribute for fields is length. The length for most fields can be either decreased or increased as desired. Here's how to do it.
2. Select the "Address 1" field on the Personal screen for customization. Change the field length from 25 to 30. Close and save the change. Open a record and change the address to 30 X's. Close and save the record. Return to the Field Customization dialog and change the field length back to 25. Close and save the changes.
3. The field that you entered at a length of 30 characters is not actually changed. The 30 characters are still stored in the database just as you entered them. However, if you select the record for editing, you will only see the first 25. To prove that the 30 characters are still there, change the

length of the “Address 1” field back to 30 and then open and verify the record. You will note that your 30 X’s are still there even though the field length has been changed back and forth between 25 and 30.

4. All fields have a maximum length. You can change the length to a value greater than this maximum. For example, the maximum length of the “Address 1” field is 50. If you try to set the length for this field to 51, you will receive an error and the new length will be rejected. You can take my word for it, or you can try it yourself.
5. Another attribute that you can set is the case attribute. Text fields can have three different case attributes: none, proper case, and upper case. By default, the “Address 1” field is set to “Proper Case”. This means that the first character of each word is capitalized. This is a typical setting for name and address fields. However, let’s assume that you prefer to have this field set to “Upper Case”.
6. Use the Field Customization dialog to change the Edit Attribute for the “Address 1” field from the “Proper Case” to “Upper Case”. When complete, close and save the change. Now, try it. Select a record and position the cursor to the “Address 1”. Enter any combination of upper and lower case letters. Then press the ENTER key. Note that the entire text is converted to upper case.
7. Close the record and return to the Field Customization dialog. Change the case setting for the “Address 1” field to “None”. Close and save the change and then try the feature in an employee record. You will see that with the “None” attribute, the text is left just as you enter it.
8. Close the record and return to the Field Customization dialog. Select the Compensation screen and the “Change Amount”. We’ll now learn about the formatting.
9. Numeric fields have a format attribute that determines how the numeric data is displayed or printed. The format is determined by a combination of the length of the field and the number of decimal places. You can see the format for the “Change Amount” field in the “Format” field on the dialog.
10. When you selected the “Change Amount” field, you may have noticed that the field labeled “Edit Attributes” was changed to “Decimal Places”. This change will always occur with numeric fields because numeric fields cannot have edit attributes, but they do have decimal places. Change the number of decimal places from 2 to 4. Note that the format for the field switches from 9.2 to 7.4. Because you have not increased the length of the field, but you have increased the number of decimal places, the number of places to the left of the decimal are decreased. If you really need 9 places to the left of the decimal, you could increase the length of the field by 2. Try it now if you like.
11. Close and save your changes. Select a record and position to the Compensation screen. Note that the data in the “Change Amount” column is now displayed with four, rather than two, decimal places. Close the record.

12. As with all customization, these changes can be changed back or modified at any time. In general, however, most customization is performed when People-Trak is initially implemented.

13. This tutorial and this lesson are now complete. Exit People-Trak.

Notes

Lesson 26

Customization 2

This lesson demonstrates additional customization features such as changing table support, setting fields to “not used”, and setting fields to “mandatory”.

Source Text

People-Trak Basics – Chapter 19

Tutorials

Changing a Support Table: demonstrates how to change the support table that is used to assist data entry in a particular field. Includes instructions for adding a user defined table to any field that does not yet have a table.

Activating the ‘Not used’ Feature: shows how to make certain fields “not used”. When a field is not used, it is complete removed from the data entry screen.

Using ‘Mandatory’ Fields: demonstrates how to make certain fields “mandatory”. When fields are mandatory, you cannot leave the field without keying a value. In addition, you cannot leave the screen if the field has not yet been entered.

Tutorial 26.1

Changing a Support Table

1. Start People-Trak and select the Personnel Module.
2. Select the Field Customization option from the Tools menu. Select the “Address 1” field on the Personal screen. We will now see how to add a support table to a field that is not currently supported by a table.
3. Position the cursor to the “Support Table” field on the dialog. You will note that the field is blank because the “Address 1” field is not currently supported by a table. We will change that. Use the popup button to display a list of tables. Scroll the list and select “User Table 1”. Close and save the change.
4. Select the Table Edit option from the Tables menu. When the list of tables is displayed, select User Table 1 for editing. Add the three lines shown below to User Table 1.

100 Main Street
1001 Maple Street
202 Elm Street
5. When complete, close and save the changes.
6. Select a record and position to the “Address 1” field. Note that the field now has a table popup button because the field is supported by a table. Open the table by clicking on the button. You should see the three entries that you made. Select one of the entries to complete the field.

7. This example is an exaggeration; you cannot successfully support the “Address 1” field with a table. However, it does demonstrate that any text field can be supported by a table, even if it does not make sense. It also demonstrates the reason why there are user-defined tables. You can use these extra tables to provide support where it was not originally designed. Close the record.
8. As we have discussed before, People-Trak is an integrated product. Thus changes that are made to a field are valid in that field throughout People-Trak. The table support that we added to the “Address 1” field is thus available in any workflow that uses “Address 1”. Let’s demonstrate.
9. Select the Address workflow option from the Activities menu. Select a record using the techniques you have recently learned. Then position to the “Address 1” field. Note that the field is supported by the user table in exactly the same way it is on the Personal screen. This is powerful stuff.
10. Clear and close the workflow.
11. Use the Field Customization dialog to remove table support from the “Address 1” field. When complete, select the “City” field. By default, the “City” field is supported by the City table. For demonstration purposes, let’s clear the support table for the “City” field and see what happens. Close and save the change. Open a record and position to the “City” field. You will note that the field is no longer supported by a table at all. Now return to the Field Customization dialog and make another change to the table support for the “City” field. Change the supporting table to the Country table and then confirm that the feature works by selecting a record and trying it out.
12. As you can see, you can support any text field with any of the available tables. Or you can drop table support from any table by clearing the table for that field. Before continuing with the next lesson, change the supporting table for the City field back to the City table.
13. Continue with the next tutorial.

Tutorial 26.2

Activating the ‘Not Used’ Feature

People-Trak provides a powerful feature that allows you to disable fields completely. There are times when the organization will decide that certain fields will not be used at all. Rather than leaving the fields on the data entry screens and skipping (or tripping over them), you can cause them to disappear. Here’s how.

1. Select the Field Customization option from the Tools menu. Select the “User Text 1” field on the User Fields screen. Position the cursor to the “Not Used” field on the dialog. Click on the checkbox so that the box is checked. Now, repeat this step for the “User Text 3”, “User Date 5”, and “User Dollar 7” fields. Close and save the changes.

2. Select a record and position to the User Fields screen. You will note that the fields you set to “not used” are gone from the screen just as if they do not exist. These fields are not only gone from the screen, they are gone everywhere else. I’ll show you.
3. Close the record and select the Lookup dialog. Position to the Custom tab. At the “Field Name” field use the popup button to display the list of fields from which you can select. Select the User Fields screen. Look for the fields that you disabled. Do you see them? No. They are gone.
4. Abandon the Lookup and create a new adhoc report. Try to select one of these fields for a report. You cannot, because they are gone.
5. If there is data stored in a field that you disable, the data is not lost. The underlying data structure in the database is unchanged; you have merely caused the field to be invisible. Let’s demonstrate this fact.
6. Select a record and enter a value into the “User Text 2” field for that record. Close the record and use the Field Customization dialog to set that field to “Not Used”. Close and save the customization. Now open the record again and position to the User Fields screen. The field is gone, but is the data? Use the Field Customization dialog to reactivate “User Text 2”. Then return to the employee record and see what appears. The field and the data are both back. Close the record and continue.
7. We demonstrated this feature using the somewhat obscure “user” fields for a reason. The reason is that you cannot set a field to “not used” if that field has been used in a document, workflow, or other type of specification. In essence, you cannot stop using a field that you are indeed using. I’ll show you what I mean.
8. Return to the Field Customization dialog and attempt to disable the “Address 1” field. You will receive a message that indicates that the field is used in a number of documents and templates. If you wish to disable this field, you need to remove it from those documents and templates first. (We won’t bother to demonstrate that.)
9. Continue with the next tutorial.

Tutorial 26.3

Using ‘Mandatory’ Fields

People-Trak provides another powerful feature that allows you to cause specific fields to be “mandatory”. When a field is made “mandatory”, you cannot leave the field without providing a value and you cannot leave a screen that uses that field without providing a value. Here’s how it works.

1. Select the Field Customization option from the Tools menu. Select the “Address 1” field on the Personal screen. Position the cursor to the “Mandatory” field on the dialog. Click on the checkbox so that the box is checked. Close and save the change.

2. Select an employee and position to the “Address 1” field. Clear the field and then press the ENTER key. What happens? The message shown below is displayed.

This is a mandatory field that must be entered.

3. Mandatory fields are mandatory. You must supply a value or you cannot leave the field. You may be thinking that you can fool People-Trak. You are thinking that you will just click on the Close button and close the record and bypass the feature. Try it. Then go ahead and try to select another record or another screen or a popup. By now you understand, mandatory fields are ... mandatory.
4. Now before you decide to reboot the computer to get past this annoying feature, simply enter “XXX” into the field and continue. There are more things to learn. Close the record so that we can see what happens with new records.
5. Start a new record by selecting the New button on the Tool bar. Enter an employee ID and a few other fields, but DO NOT position to the “Address 1” field. Now, try to save the record. Do you think you can sneak by that mandatory field lurking below? The answer is NO. The message shown below is displayed.

*The following field is mandatory, but has not been completed:
Address 1*

6. When you click on the OK button to acknowledge the message, the cursor is placed right into the “Address 1” field. You know what happens now. You do not get out of this field, you do not pass GO, and you do not collect 200 dollars unless you provide a value. Enter “XXX” and close the record.
7. As you might have guessed, the mandatory attribute will apply when the field is used within a Workflow. Let’s try this... for fun.
8. Select the Address workflow from the Activities menu. Select a record. Now, clear the “Address 1” field and attempt to move to the next field. You will see the same message and be caught in the same dilemma. Enter “XXX” and close the workflow. You get the point.
9. Mandatory fields work exactly as advertised and should be used with discretion. To save yourself further grief, use the Field Customization dialog to change the “Address 1” field back to non-mandatory.
10. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 27

Scheduler 1

This lesson shows how create, run, modify, and delete scheduled items.

Source Text

People-Trak Basics – Chapter 20

Tutorials

Create a Scheduled Item: demonstrates how to create and then activate a scheduled item.

Modify a Scheduled Item: shows how to select a sub-screen from a primary data entry screen and to subsequently exit the screen either saving or abandoning any changes made on the sub-screen.

Delete a Scheduled Item: demonstrates how the data validation features work to prevent invalid data from being saved to the underlying People-Trak database.

Tutorial 27.1

Create a Scheduled Item

1. Start People-Trak and select the Personnel Module.
2. Select the Scheduler option from the Tools menu or use the Scheduler button on the Tool Bar. The Task Scheduler dialog is displayed. This dialog is used to create and manage items that you have scheduled. Items are initially scheduled with the “new item” wizard. Let’s try it.
3. Click on the New button on the Tool Bar or use the New Task option on the File menu. The first panel in the New Task wizard is displayed. This panel is purely informational. Click on the Next button to move to the next panel.
4. This panel is used to specify the type of task that is to be scheduled. There are three options: programs (menu options), documents, and reminders. For this first item, click on the Reminder radio button and press the Next button.
5. The panel that is displayed when you click on the Next button from the “type of item” panel differs depending on the type of task. For a reminder, the panel provides fields to record the name and text of the reminder.
6. Enter the reminder name “My reminder”. Then enter the reminder text: “this is my reminder”. Then press the Next button to move to the next panel.
7. This panel is used to specify the frequency with which this task is to be performed. There are a variety of options that have been explained in the narrative. For demonstration purposes, select “Daily” and then record

today’s date in the “Start Date” field. Click on the Next button to move to the next panel.

8. This panel is used to specify how you want this item to run. There are two ways. You can run the item from the inbox whenever you want, or you can be reminded to run the item when you login to the module. Accept the default entry “on demand” and press the Finish button to complete the creation of the item.
9. When the item is complete, the entry will now appear in the Task Scheduler dialog. This entry is NOT the actual reminder. This is the template that determines when the reminder should be issued and what the reminder is supposed to say.
10. Scheduled items appear in the Inbox on the day they are scheduled. If an item is scheduled daily, it will appear daily. We scheduled a reminder to be shown daily. Let’s check the Inbox and see if it appears.
11. Use the Inbox icon on the Tool bar or the Inbox option on the Tools menu to activate the Inbox. When the Inbox dialog is displayed, the reminder we just created is listed. We’ll learn about the Inbox in a later lesson. For now, highlight the reminder and click on the Run button. The reminder will be displayed. Close the reminder and note that the reminder has now been labeled “Completed”.
12. Close the Inbox and then reopen it. Note that the reminder we created is no longer listed because it has already been run today. The reminder will appear again tomorrow and the day after because it was scheduled to run daily.
13. Another type of task to schedule is a program (or menu option). Start the Task Scheduler and start the New Task wizard. Skip over the first panel. On the second panel, select “Program” and continue to the next panel. On this panel, you will see a list of the menu options that are available for scheduling.
14. Select the Address workflow that we have used in prior lessons. Move to the next panel and schedule the workflow to be run monthly starting today. Finally move to the last panel, schedule the workflow to run “on demand” and press the Finish button to complete the task. When complete, the program will appear in the Task Scheduler dialog.
15. Close the Task Scheduler and check the Inbox again. Because this workflow was scheduled monthly starting today, it will show up today.
16. Now close the Inbox without running the task and continue with the next tutorial.

Tutorial 27.2

Modify a Scheduled Item

Scheduled tasks are not permanent; you can change them if needed. In this tutorial we will show you how.

17. Select the Scheduler option from the Tools menu or use the Scheduler button on the Tool bar. When the Task Scheduler dialog is displayed, highlight the reminder that we created and ran in the last tutorial.
18. Use the Open button on the Tool Bar or the Open Task option on the File menu to display the Task Properties dialog. This dialog can be used to change schedule properties. The first tab is informational and merely identifies that you have chosen the right task. Select the second tab.
19. The second tab shows the current schedule information including the frequency and start date. At this point, the start date does not actually show the date when you first scheduled the item; it shows the date when the item is scheduled next. You can change this date to reset the date when the item will run again. Let's try it.
20. Change the start date to today. Close and save the changes and then close the Task Scheduler.
21. Open the Inbox and the reminder will be shown again because the date has been reset for today. Run the reminder and then close the Inbox. Open the Inbox again and the reminder will be gone.
22. Return to the Task Scheduler and reset the date back to today. Return to the Inbox and the reminder will be back again. Close the Inbox.
23. You can modify more than the next start date using the Task Properties dialog. You can actually change the entire schedule. Let's do that now.
24. Start the Task Scheduler and select the reminder for editing. On the second tab, change the frequency from "Daily" to "Monthly". Set the starting date to any future date and change the task from "on demand" to "at login". Close and save the changes. We have completely modified the task.
25. You cannot change the text of the reminder. If you need a different reminder, you can delete the current one and create a new one.
26. Continue with the next tutorial

Tutorial 27.3

Delete a Scheduled Item

In the last two tutorials, we have seen how to create and modify scheduled tasks. Our task scheduler is now littered with unneeded tasks. Let's delete them.

1. Start the Task Scheduler and highlight the reminder task that we created in the first tutorial. Use the Delete button on the Tool Bar or the Delete Task option on the File menu to delete the task.
2. If those instructions were not explicit enough, repeat them again for each of the tasks that you created. When the tasks are all deleted, close the Task Scheduler dialog.
3. Scheduled tasks are added to the Inbox dynamically when the Inbox is displayed. If you open the Inbox in the morning and see a scheduled document, but do not run it, that document will not appear if task template is deleted before you do run the document.
4. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 28

Scheduler 2

This lesson shows how create, run, modify, and deleted scheduled items.

Source Text

People-Trak Basics – Chapter 20

Tutorials

Schedule a Document: shows how to schedule and run a document.

Running an Item ‘At-Login’: demonstrates how the “at login” feature is used with scheduled items.

Schedule with Document Explorer: shows how to schedule a document using the Document Explorer.

Tutorial 28.1

Schedule a Document

In the last lesson, we scheduled both a reminder and a program. Now, let’s schedule a document.

1. Use the New button to start the new task wizard. Skip over the first panel. On the second panel, select “Document” and continue to the next panel. On this panel, you will see a list of documents. The documents are listed alphabetically within category.
2. Find a meaningful report and select it. Then, move to the next panel and schedule the document to be run weekly starting today. Finally, move to the last panel, accept the default “on demand” and press the Finish button to complete the task. When complete, the document will appear in the Task Scheduler dialog.
3. Close the Task Scheduler and check the Inbox. Because this document was scheduled weekly starting today, it will show up today. If we run it today, it will not show up again for a week. If we do not run it, it will show up each day until it is run.
4. Run the document. The document is created and displayed in the Document Viewer just as if it were run from either the Document Explorer or the Adhoc Reports dialog.
5. Close the Document Viewer and note that the Inbox entry is now labeled “Completed”.
6. Close the Inbox. Select the Scheduler and delete the document item we just scheduled. Close the Scheduler.
7. Close the Inbox and continue with the next tutorial.

Tutorial 28.2

Running an Item ‘At Login’

In the prior tutorials, we have been running scheduled items on demand from the Inbox. Scheduled items can also be scheduled to run when you login. We’ll demonstrate that now.

1. Use the Scheduler to create and schedule a reminder. Set the reminder to run daily and have it start today.
2. On the final tab, check the box marked “at-login” to cause this reminder to be available at the time you login.
3. Close the Task Scheduler and check the Inbox again. Because this workflow was scheduled daily starting today, it will show up today. Now close the Inbox without running the task and we’ll demonstrate how “at login” tasks work.
4. Use the Exit Module option on the File menu to close the Personnel module. From the Select Module dialog, select the Personnel module again. Because we have a pending “at login” item, a message similar to the one shown below is displayed.

Task “Address” has been scheduled to execute at login. Execute task now?

5. Click on the No button to skip the task for now. A message indicating that the task was not executed will be displayed.
6. Open the Inbox and check for the reminder. It is there just as before because it has not been executed for today.
7. Close the Inbox and exit the Personnel module.
8. From the Select Module dialog, select the Personnel module. When the task message is displayed this time, press the Yes button to execute the tasks. The reminder you created will be displayed. If there other “at login” tasks, these too would be presented for execution one after another until all tasks are either completed or skipped.
9. Open the Inbox and look for the reminder. It does not appear because the task has already been executed today.
10. Close the Inbox and continue with the next tutorial.

Tutorial 28.3

Schedule with Document Explorer

Documents can also be scheduled for automated execution using the Document Explorer. This is how to do it.

1. Start the Document Explorer from the Documents Menu.
2. Highlight a document to be scheduled.
3. Press the Properties button or the Document Properties option on the File Menu to display the Document Properties dialog.
4. Select the Schedule tab.
5. Select the daily frequency and set the start date to today's date.
6. Leave the "at-login" box unchecked.
7. Close and save the document properties. Close the Document Explorer.
8. Open the Scheduler. Note that the document you scheduled is listed just as if it had been recorded with the Scheduler. The schedule can be changed or the item deleted.
9. Close the scheduler and open the Inbox. Because the document was scheduled daily starting today, the item is listed in Inbox. Go ahead and run the report. Again, the scheduled document runs just as before.
10. Close the Document Viewer. Then close the Inbox. Open the Scheduler and delete the scheduled document.
11. Close the Scheduler and start the Document Explorer. Locate the document for which the schedule was just deleted. (The document was not deleted, only the schedule for that document).
12. Open the Document Properties for that document. Note that the schedule is gone. It was deleted when the item was deleted from the Scheduler.
13. Close the Document Properties dialog. Close the Document Explorer.
11. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 29

Alerts

This lesson demonstrates the techniques used to create and test new alerts and to modify and delete existing alerts.

Source Text

People-Trak Basics – Chapter 21

Tutorials

Create and Test a New Alert: demonstrates how to create a new alert and how to view the alerts when they are triggered.

Modify an Alert: shows how to modify an existing alert.

Delete an Alert: shows how to delete an alert when it is no longer needed.

Tutorial 29.1

Create and Test a New Alert

1. Start People-Trak and select the Personnel Module.
2. Select the Set Alerts option from the Tools menu or use the Alerts button on the Tool Bar. The Alerts Builder dialog is displayed. This dialog is used to create and manage alerts. Alerts are with the “new alert” wizard. Let’s try it.
3. Click on the New button on the Tool Bar or use the New Alert option on the File menu. The first panel in the New Alert wizard is displayed. This panel is purely informational. Click on the Next button to move to the next panel.
4. This panel is used to specify the name of the Alert and the message that will be displayed when the Alert is triggered. For the alert name, enter “Birthday Alert”. For the alert message, enter: “Happy Birthday”. When the entries are complete use the Next button to move to the next panel.
5. This panel is used to specify the date upon which the alert will be based. Locate and highlight the Birth Date field. Then click on the Next button to move to the next panel.
6. This panel is used to specify the type of alert. Different types of alerts are used for different dates. Because the birth date happens just once, but it has an anniversary each year, select the “Anniversary Of” type. Click on the Next button to move to the next panel.
7. This panel is used to indicate how many days in advance of the actual date you wish to be notified. For our initial test, leave the field blank and move to the next panel.
8. This panel is used to indicate if emails are to be sent. There are three options. You can send email to yourself (the user), you can send email to the employee, and you can send email to the employee’s supervisor. For our test,

select the employee and the supervisor. In this way, the employee will receive a “Happy Birthday” email and the supervisor will notified that there is a birthday in his or her department. Press the Finish button to complete the creation of the alert.

9. When an alert is complete, the entry will now appear in the Alert Builder dialog. This entry is NOT the actual alert. This is the template that is used when creating the alerts when the alerts are triggered.
10. Alerts appear in the Inbox on the day they are triggered. Emails, if specified, are also sent when the alert is triggered. Unlike scheduled items, alerts are not triggered when the Inbox is opened. They are triggered when you start People-Trak. Queries are executed to determine if there are any alerts. If an alert is triggered, an alert message is added to the Inbox. Let’s show how this works.
11. Close the Alert Builder dialog. Select an employee such as Donald Stern and change the birth date to a year in the past that has the same month and day as today. This will cause the alert to be triggered today. Close the record.
12. Close the Personnel module and exit People-Trak. Now start People-Trak again. During startup, the People-Trak will check to see if any birthdays have anniversary dates today (according to the alert we just created). In the future, when you have created other alerts, these will be checked according to their specific criteria. When the alerts have been checked and triggered, the Select Module dialog will be displayed as usual. If alerts or scheduled items have been detected, there will be a scheduler icon added to the module. There should be one there now.
13. Select the Personnel module and open the Inbox. There should be an alert present for Donald Stern because today is the anniversary of the birth date you entered. Highlight the alert and press the Run button to display the alert. The alert will include the name and ID of the employee, the alert name, and the alert message.
14. When this alert was triggered during startup, emails were automatically generated for the employee and for the employee’s supervisor. The emails are not sent when the Inbox is opened and the alert displayed.
Note: The email feature can only work if email addresses have been entered for the employee and for the employee’s supervisor. In addition, the employee’s supervisor must be specified in the Supervisor ID field on the Job Detail screen. Otherwise, the manager’s email cannot be derived.
15. Close the Inbox and open it again. The alert is no longer present. A birthday alert for this employee will not appear again for another year. If you exit People-Trak and return, this alert will not run again because the alert template stores the fact that the alert has been run today already.
16. You can create a wide variety of alerts. Let’s demonstrate one more type. Return to the Alert Builder dialog and

start the “new alert” wizard. Name the alert “Performance Review Due”. Set the text of the alert message to: “A performance review is due shortly for this employee”.

17. Move to the next panel and base the alert on the Next Review Date field. Move to the next panel and set the alert type to “Days Before”. Then set the number of days to “7”.
18. Move to the next panel and leave the advance notification blank. Move to the next panel and cause an email to be sent to the manager only. Click on the Finish button to complete the alert.
19. This alert can now be used to notify HR of a pending performance review and to generate an email to the supervisor that a review is due. Note that there is no communication generated for the employee; in this alert, it is not required.
20. The next time you start People-Trak, this alert will check for performance reviews that meet the criteria. If an employee has an alert seven days away, an email and alert will be generated. There is no time to demonstrate this. Just take my word for it.
21. Continue with the next tutorial.

Tutorial 29.2

Modify an Alert

Alerts are not permanent; you can change them if needed. In this tutorial we will show you how.

1. Select the Alerts option from the Tools menu or use the Alerts button on the Tool bar. When the Build Alerts dialog is displayed, highlight the birth date alert we created in the last tutorial.
2. Use the Open button on the Tool Bar or the Open Task option on the File menu to display the Alert Properties dialog. This dialog can be used to change anything about the alert.
3. For example, if you want to receive an email as a user of People-Trak when the birth date alert is triggered (in addition to the Inbox notification), you could check the box for “Email User”. Or, you could change the message to make it more meaningful for the email recipients.
4. Let’s change the alert message. Position to the field and move the cursor to the end of the line. Add three exclamation points to the message to highlight our excitement about the employee’s birthday. Close the Alert Properties dialog. The changes are permanently saved with the alert template.
5. These changes take effect the next time an alert is generated. If there are alerts already residing in the Inbox, they will not be modified.
6. Continue with the next tutorial

Tutorial 29.3

Delete an Alert

In the last two tutorials, we have seen how to create and modify alerts. Our alert builder contains alerts that we do not want. Let’s delete them.

1. Start the Alert Builder and highlight the birth date alert that we created in the first tutorial. Use the Delete button on the Tool Bar or the Delete Alert option on the File menu to delete the alert.
2. If those instructions were not explicit enough, repeat them again for the other alert we created. When the alerts are all deleted, close the Alert Builder dialog.
3. If alerts have been added to the Inbox and you then delete the alert template, the alerts that have been generated are not deleted. Alerts that have already been generated will be removed from the Inbox after they have been viewed.
4. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 30

Inbox

This lesson demonstrates how to use the inbox to display items, postpone items, and to show tasks for the current user or for all users. It also shows how to run scheduled items, view alerts, and reactivate postponed batches.

Source Text

People-Trak Basics – Chapter 22

Tutorials

Using Inbox Features: demonstrates how to use Inbox features such as showing daily or weekly items, postponing an item, and showing all tasks or only those tasks assigned to yourself.

Run Scheduled Items: shows how to run a scheduled items and alerts that appear in the Inbox.

Reactivating a Postponed Batch: shows how to reactivate a batch that has been postponed and is now listed in the Inbox.

Tutorial 30.1

Using Inbox Features

1. Start People-Trak and select the Personnel Module.
2. Start a Performance Review batch and then postpone it. Give the batch a meaningful name.
3. Create a new Birth Date alert to replace the one we deleted.
4. Schedule any document to be run daily starting today.
5. Schedule another document to run tomorrow.
6. Now that we have plenty of items for demonstrating the Inbox, open the Inbox. By default, in the Demo version of People-Trak, the caption for the dialog box will indicate "Department Inbox for Today". This means that Inbox items are being shown for all users in the HR department.
7. Click on the button labeled "My Tasks". The following will occur. The button caption will change to "All Tasks", the dialog caption will change to "My Inbox for Today", the "User" column will be removed, and the list of items in the Inbox will include only your items. Click the button again (it is now labeled "All Tasks") and the changes will be reversed. This feature allows senior HR staff members to make certain that all scheduled tasks and other Inbox items are being performed.
8. The ability to show items for all users is a security feature. It can be enabled or disabled for the desired users. It is enabled for the DEMO user and thus you can see items for the entire department. Let's disable the feature now.

9. Close the Inbox and select the Security Setup option from the Administration Menu. On the General tab for the DEMO user, deactivate the "Show All Users in the Inbox" feature. Close and save this change.
10. Open the Inbox again and you will see that you are now limited to seeing your Inbox items only. The "My Tasks/All Tasks" button has been removed. Close the Inbox and reset the "all users" feature. Then open the Inbox again.
11. There are two ways to activate Inbox items. You can highlight the item and click on the Run button (this was demonstrated in earlier lessons), or you can just double-click the item. Run the document that you scheduled for today by double-clicking. Close the Document Viewer when you have finished viewing the document. Note that the item is now labeled as "Completed".
12. Close the Inbox and then reopen it. The completed item is gone.
13. The Inbox can be used to view items for today or for the entire week. Click on the "This Week" button. The list of items will be updated to include those that are scheduled later in the week. Because we scheduled a document for tomorrow, that document should show up now. In addition, the document scheduled to run daily that was already run today should show up for tomorrow. Finally, the button name will be changed to "Today".

Note: Remember that Alerts are generated when you start People-Trak. Setting the Inbox to look forward will NOT show alerts that would be scheduled later in the week.

14. Click on the button again (now named "Today") to restore the list to the items listed for today. The "This Week/Today" button is available to all users at all times.
15. To demonstrate another feature, show the items for the entire week again. This time, highlight (but do not run) the document that was originally scheduled to run tomorrow. Click on the Postpone button and reschedule the document to run today. Now close the Inbox and reopen it. The document now shows up for today. Show the items for the whole week and you will see that it is no longer scheduled for tomorrow.
16. Any item can be postponed at any time. You can postpone forward or backward. If you postpone backward prior to today, the item will show up for today because the Inbox will simply assume that the date was missed.
17. Close the Inbox and continue with the next tutorial.

Tutorial 30.2

Run Scheduled Items

In prior lessons, you have seen how to run scheduled items and how to view alerts. In this tutorial, we will demonstrate this feature one more time.

1. Open the Inbox and select one of the scheduled documents. Double-click on the document to run it. The report is run just as if it were selected from the Document Explorer. Once the Document Viewer is displayed, you can treat the document just as if it were run from the Document Viewer. This means that you can export the document to any of the output options or you can email the document to whomever you wish.
2. When you close Document Viewer, the Inbox is redisplayed and the scheduled item is set to “Completed”.
3. Now double-click on the alert that was generated for Donald Stern. The alert message dialog is displayed. View the alert and be happy for Donald. Then close the dialog and return to the Inbox. Again, the alert is set to “Completed”.
4. Close the Inbox and then return. Note that all completed items have been removed from the Inbox.

Tutorial 30.3

Reactivating a Postponed Batch

In the first lesson on Batch Processing, you were shown that you could postpone a batch for later processing. (You were asked to do this at the start of this lesson.). Knowing that postponed batches could be easily forgotten, we have chosen to add them to your Inbox. Postponed batches show up in your Inbox just as soon as you postpone them. There is not “alert date” or “scheduled date”. The batch that you postponed earlier should have already appeared. Let’s find out.

5. Open the Inbox. You should see the batch you postponed. Reactivate the batch by double-clicking on the Inbox item.
6. The Performance Batch processing program is displayed just as if you selected it from the Processing menu. The batch itself is displayed just as if you had keyed.
7. Now that the batch has been displayed, you can post it. Post the batch now and review the audit trail. Close the Document Viewer. When the Inbox is displayed, the item will be set to “Completed”. That is all there is to it.
8. If you reactivate a batch and attempt to leave the batch without posting it, it will be assumed that you wish to abandon the batch. If you abandon the batch, it will be deleted even though you postponed it earlier. If you enter a postponed batch and wish to keep the entries without posting, you need to postpone the batch again. If you do this, there will be only one postponed batch in your Inbox, the new one.

9. This tutorial and this lesson are now complete. Exit People-Trak.

Lesson 31

User Preferences

This lesson describes the techniques used to create and maintain the user records for the users who access People-Trak.

Source Text

People-Trak Basics – Chapter 23

Tutorials

Setting Data Entry Preferences: shows how to set data entry preferences.

Changing Screen Order: shows how to change the screen order.

Changing Report Preferences: demonstrates how to set and use the report default preferences.

Tutorial 31.1

Setting Data Entry Preferences

People-Trak provides a number of data entry preferences that can be defined for each user. These preferences include colors, sounds, and user interface features. Here's how you can change them.

1. Select the User Preferences option on the Tools Menu. You should be editing the record for the DEMO user that you used to initially logon.
2. Position the cursor to the Normal Color field. Use the popup to change this color to green. Likewise, change Modified Color to magenta and the Mask Color to gray. Close the User Setup dialog to save the changes.
3. Start User Preferences dialog again and note that the settings have taken effect. While these settings may seem "odd" to you, remember that each user has their own preferences and one person's "odd" is another person's "wonderful".
4. Before screaming, set the colors back to Blue, Red, and Yellow (or your personal preferences) and exit the User Setup dialog to save the changes.
5. Start the User Setup dialog again and position to the "Enable Sound" field. For PC's with sound, this field is used to activate or deactivate the beep that emanates from People-Trak when data entry errors are found or when messages are displayed. Many people do not like the beep, some do. You can check the box accordingly.
6. Position the cursor to the Classic Interface field. This field determines if text boxes (stand alone and in grids) are to be treated in the Windows way or in the People-Trak Classic Interface way. At this point, the box should be checked. As you move the cursor around, you will

note that with the classic interface, the background color is set and the entry in the field is not pre-selected.

7. Change the interface to the Windows standard by setting the check box. Close the User Setup dialog to save the change.
8. Return to the User Preferences dialog and you can see how the Windows interface works. As you move the cursor from field to field, there is no background color and the contents of the field are pre-selected. If you touch a key when the contents are pre-selected, the contents are replaced with the key you pressed. This scares people and this is why the classic interface was developed. It is a better way to meet the heavy data entry requirements of a personnel management product.
9. Reset the classic interface to the People-Trak way and close the User Preferences dialog.
10. Continue with the next tutorial.

Tutorial 31.2

Changing Screen Order

In an earlier lesson, you learned how to set the screens that would be available to all users within the current module. From that list, any user can determine the screens they wish to see and the order in which they will be listed and displayed. This is how it works.

1. Use the Open Employee feature to open the record for Donald Stern. Review the Screens drop-down and note the number of screens present and the order. The number of screens should reflect those screens made available with the Module Setup dialog and the order should be the order in which the screens appeared in the Module Setup dialog. Close the record for Donald Stern.
2. Select the User Preferences option on the Tools Menu. You should be editing the record for the DEMO user that you used to initially logon. Position the cursor to the Screens tab.
3. The first thing we will learn about is turning screens off. Use the checkbox feature to disable four or five screens. Then close the User Preferences dialog.
4. Select Donald Stern for editing and review the Screens dropdown. The list of screens has been reduced to reflect the changes you made. Close the record for Donald Stern.
5. Select the User Preferences option and position to the Screens tab. Reactivate the screens that you just disabled. In addition, change the order of the screens using the Up and Down buttons. When you have completely scrambled the order of the screens, close the User Setup dialog.
6. Select Donald Stern for editing and review the Screens dropdown. The list of the screens and the order should reflect the changes you just made. This feature is very useful for those users who do not need to start with a specific screen or who do not need to see certain

information (by their personal discretion). For example, a benefits coordinator may wish to start with the Benefits screen, or a training coordinator may wish to start with the training screen. Close the record for Donald Stern.

7. Select the User Preferences option and position to the Setup tab. Correct the mess you made of the Screens using the Defaults button. The list of screens will be reset to that defined by the Default user.
8. Close the User Preferences dialog and continue with the next tutorial.

Tutorial 31.3

Changing Report Preferences

Report preferences are used to set the defaults when adhoc reports are first created. When the defaults are set as desired, the process of creating an adhoc report as desired is greatly simplified.

1. Select the Document Explorer option from the Documents menu.
2. Start a new document using the New Document option on the File Menu or the New Document button on the Toolbar. You will be shown a list of document types. Select the Adhoc Report type. The Adhoc Report dialog is displayed. This dialog will be reviewed in detail in subsequent lessons. The purpose of this visit to the dialog is to merely review the default settings.
3. There are default settings for the last four fields on the Specification tab. These defaults are set with the User Setup program. The other defaults pertain to fonts and font colors.
4. Position to the Report Definition tab. Use the button to select a field for the report. Use the Full Name field from the Derived category.
5. Use the Run option on the File Menu or the Run button on the Toolbar to run the report. Note that the fonts and font colors match the defaults set with the User Setup program. Also the defaults for orientation (portrait), double-space (off), grid lines (off) and auto-format (on) can be seen. Close the Document Viewer. Close the Adhoc Report dialog. Close the Document Explorer.
6. Select the User Preferences option on the Tools Menu. You should be editing the record for the DEMO user that you used to initially logon. Position the cursor to the Report Format tab.
7. Change the color of the heading font from blue to red. Change the color of the body font from blank to green. Finally, change the settings for double-space and grid lines from "Off" to "On". Close the User Preferences dialog.
8. Select the Document Explorer option from the Documents menu.

9. Start a new document using the New Document option on the File Menu or the New Document button on the Toolbar. You will be shown a list of document types. Select the Adhoc Report type. The Adhoc Report dialog is displayed. This time, the defaults are different.
10. Position to the Report Definition tab. Use the button to select a field for the report. Use the Full Name field from the Derived category.
11. Use the Run option on the File Menu or the Run button on the Toolbar to run the report. Note that the fonts, double-space, and grid lines settings now reflect the new defaults that you have set. All reports created from this point forward will have these settings. Close the Document Viewer. Close the Adhoc Report dialog. Close the Document Explorer.
12. Select the User Preferences option on the Tools Menu. Use the Defaults button to restore your defaults back to those that match the Default user.
13. This tutorial and this lesson are complete. Close any open dialogs and exit People-Trak.

Lesson 32

Contact Manager

This lesson describes how to use the Contact Manager to track personal and professional contacts.

Source Text

People-Trak Basics – Chapter 24

Tutorials

Add a Contact: shows how to add a new contact to the list of contacts.

Delete a Contact: demonstrates the techniques used to delete an existing contact.

Using Ticklers: shows how to create and view date sensitive ticklers associated with contacts.

Make a Contact Common: shows how to make one of your contacts common to all users.

Tutorial 32.1

Add a Contact

1. Start the Contact Manager using the Contacts option on the Tools Menu or the Contact Manager icon on the Toolbar. The Contact Manager dialog is displayed.
2. The Contact Manager uses the same operating conventions as modules within People-Trak. Let's use these conventions to add a contact now.
3. Use the New Contact option on the File Menu or the New Contact button to start a new contact. A new contact is started and the phrase "New Contact" is added as the company name. The new contact is also added to the contact dropdown on the Toolbar.
4. Complete the contact by adding a few fields. When complete, exit the Contact Manager. The new contact will be automatically saved.
5. Start the Contact Manager again. This time, note that a list of all active contacts (your new contact) is displayed in the contact dropdown. The first contact in the list (your new contact) is active.
6. Start a second new contact and add a few fields. When complete, use the Next Contact button to move to the next contact. This will automatically save the contact being added and display the next contact, which is actually the first contact we added.
7. Close the Contact Manager.

Tutorial 32.2

Delete a Contact

1. Start the Contact Manager.
2. Select one of the contacts that you have added.
3. When the desired contact is displayed, use the Delete Contact option on the File Menu or the Delete Contact button on the Toolbar to delete the contact. Note that the record is removed from the contact dropdown and that the list of available contacts is reduced by one. The contact that is currently displayed switches from the contact being deleted to the next contact in the list.
4. Close the Contact Manager and continue with the next tutorial.

Tutorial 32.3

Using Ticklers

Ticklers are like Alerts except that they are unique to the Contact Manager. You can set a tickler with a message and a date and when the date arrives, you will be notified.

1. Start the Contact Manager.
2. Select a contact.
3. Position to the Tickler field and enter a brief message or reminder.
4. Position to the Tickler Date field and enter today's date. This will be the date when the tickler will become active. Normally, you would enter a future date, but for demonstration purposes, we need to enter the current date.
5. Close the Contact Manager.
6. Now, let's assume that it is the start of a future day and we wish to check the Inbox for alerts, scheduled items, and ticklers.
7. Check the Inbox now. Note that your tickler is listed along with any other inbox transactions.
8. Close the Inbox. You can have one tickler per contact. Once a tickler expires, you can set another tickler by changing the date and the message as necessary.

Tutorial 32.4

Make a Contact Common

When you add a contact to your contact list, that contact is in your list only. This makes sense for your personal contacts. However, some business contacts can be common to all users.

1. Start the Contact Manager.
2. Select the contact you wish to make common.
3. Use the Make Contact Common option on the File Menu to make the contact common.
4. This contact will now show up for all users.
5. Close the Contact Manager.
6. This tutorial and this lesson are complete. Close any open dialogs and exit People-Trak.

Lesson 33

Inter-Module Communication

This lesson describes how information can be shared between the various People-Trak modules so that redundant data entry is entirely avoided.

Source Text

People-Trak Basics – Chapter 24

Tutorials

Applicant to Personnel: demonstrates how to transfer applicant information from the applicant record to a new employee record when the record is created.

Personnel to Applicant, Safety, COBRA: shows how to transfer employee information to the applicant, safety, and COBRA modules.

Position Control to Personnel, Applicants: demonstrates how to load position information from the Position Control module into the Personnel and Applicant modules.

Tutorial 33.1

Applicant to Personnel

One of the most common inter-module transfers is the transfer of applicant information to personnel when an applicant is hired. Here is how it is done.

1. Start People-Trak and select the Personnel Module.
2. Select the Module Setup option on the Administration Menu. Position to the Options tab. Verify that the “Prompt for Applicants” checkbox is checked. When checked, you will be prompted to import from applicants when a new record is created. When not checked, the import from applicants feature is ignored.
3. Position the cursor to the “Applicant Database” field. This field is used to indicate the company from which applicants are to be retrieved. If the field is blank you will be prompted for the company. When you know the company in advance, you can avoid the unnecessary prompt by specifying a company in this field. To keep things simple, set this field to the DEMO company.
4. Close the Module Setup dialog.
5. Use the New Employee option on the File Menu or the New Employee button to create a new record. The Personal screen is displayed followed by a list of the applicants in the DEMO company. You can select any of the applicants to create an employee record for that applicant. Pick the record for Julie Carrington.
6. The Select Applicant dialog is cleared and the relevant information from the applicant record for Julie Carrington is displayed in the modified color just as if you had just keyed it.

7. Move through the screens and you will find relevant information from the applicant record now stored in the employee record. The amount of information is limited to the information that is common between the modules and the information that was actually entered in the applicant module. If no background or skills information was entered, it cannot be transferred. Add an employee ID and save the record.
8. The applicant record remains in the Applicant module. Only a copy was moved to the Personnel module.
9. Continue with the next tutorial.

Tutorial 33.2

Personnel to Applicants, Safety, COBRA

Information can be transferred from the Personnel module to the Applicants module, the Safety Management module, and the COBRA Administration module. The methods for each are unique.

1. If you have an active internal hiring process, it can be beneficial to track employee records in the Applicants module. The manner in which employee records are transferred to Applicants is very similar to the way applicant records are transferred to Personnel.
2. Exit the Personnel module and start the Applicants module. Select the Module Setup option from the Administration Menu and position to the Options tab. Activate the “Prompt for Employees” feature and set the Employee Company to be “DEMO”. Close the Module Setup dialog.
3. Use the New Applicant option on the File Menu or the New Applicant button on the Toolbar to create a new record. The Personal screen is displayed followed by a list of the employees in the DEMO company. You can select any of the employees to create an applicant record for that employee. Pick the record for Donald Stern.
4. The Select Employee dialog is cleared and the relevant information from the employee record for Donald Stern is displayed in the modified color just as if you had just keyed it.
5. Move through the screens and you will find relevant information from the employee record now stored in the applicant record. The amount of information is limited to the information that is common between the modules and the information that was actually entered in the Personnel module. If no background or skills information was entered, it cannot be transferred. Add an applicant ID and save the record.
6. The employee record remains in the Personnel module. Only a copy was moved to the Applicant module.
7. The way in which employee information is transferred to the Safety Management module is a little different. We'll demonstrate that now.

8. Close the Applicant module and select the Safety Management module.
9. Use the New Incident option on the File Menu or the New Incident button on the Toolbar to create a new record. You will not be prompted for an employee ID because some incidents may not pertain to an employee and because there can be multiple incidents per employee.
10. Position the cursor to the Employee ID field on the Incident screen. Use the button to display a list of the employees in the current company. Select Donald Stern.
11. The Select Employee dialog is cleared and the relevant information from the employee record for Donald Stern is displayed in the modified color just as if you had just keyed it. With this transfer, the information is limited to the name, address, and demographic information. Normally, you would now add additional information to complete a basic incident record. For now, however, abandon the record using the Delete Incident option on the File Menu.
12. The way in which employee information is transferred to the COBRA Administration module is again different from the other two transfers. We'll demonstrate that now.
13. Close the Safety Administration module and select the Personnel module.
14. Select the record for Donald Stern and position to the Status screen. Position to the Qualifying Event field in the COBRA section on that screen. Complete the fields on the screen as follows.

Qualifying Event:	Medicare Eligibility
Qualifying Event Date:	07-01-2003
Date Employer Notified	07-07-2003
Election Letter Date:	07-10-2003
Date of Election:	07-30-2003

15. When complete, use the Elect button to start the transfer process. The message shown below is displayed.

Create COBRA record for this Employee?

16. Press the Yes button to create the record. A message confirming the record creation is displayed. Clear the message. Note that the "Elected COBRA" checkbox is now checked indicating that COBRA record has been created.
17. Close the record for Donald Stern.
18. Close the Personnel module and open the COBRA Administration module.
19. Select the record for Donald Stern. Move through the screens and note that all relevant information has been transferred including the fields you just entered. Also, if Donald Stern was enrolled in any COBRA eligible benefit plans, enrollment in those plans has been started as well.
20. Close the record for Donald Stern and close the COBRA Administration module.

21. Continue with the next tutorial.

Tutorial 33.3

Position Control to Personnel, Applicants

Information can be transferred from the Position Control module to the Personnel module and the Applicants module. The methods are similar, but we'll show both.

1. Start the Personnel module and select the record for Donald Stern. Position to the Compensation screen and use the button at the far right of the first row to popup the Job Detail screen.
2. On the Job Detail screen, you can complete job details using either the job table or the Position Control module. The job table brings in a number of fields, but the Position Control module can be used to populate virtually the entire screen. Lets try it.
3. Position to the Job Code field and select any job (other than the current job). Note how much information is populated.
4. Now position to the Position Number field and select any position (other than the current position). Note how much more information is populated. All of this information comes from the Position Control module.
5. You can only use the Position Control module to populate position information if you have licensed the Position Control module. Now lets see how position information can be transferred to the Applicant module.
6. Close the record for Donald Stern.
7. Close the Personnel module and start the Applicants module. Select the applicant record for Donald Stern.
8. Position to the Positions screen and use the button at the far right of the first row to popup the Position Detail screen.
9. This screen is very similar to the Job Detail screen in the Personnel module. On the Position Detail screen, you can complete position details using either the job table or the Position Control module. The job table brings in a number of fields, but the Position Control module can be used to populate virtually the entire screen. Lets try it.
10. Position to the Position Number field and select any position (other than the current position). Note how much information is populated. All of this information comes from the Position Control module.
11. You can only use the Position Control module to populate position information if you have licensed the Position Control module.
12. Close the record for Donald Stern.
13. This tutorial and this lesson are now complete. Exit People-Trak.

5

Setup and Administration

Lesson E – Enterprise/Company Setup

- Tutorial E.1 – Adding/Deleting Companies
- Tutorial E.2 – Changing Logo and Report Appearance
- Tutorial E.3 – Changing Formats
- Tutorial E.4 – Using External Programs

Lesson F – Module Setup

- Tutorial F.1 – Changing Active Screens
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Lesson G – Security Setup

- Tutorial G.1 – Securing Companies and Modules
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- Tutorial G.4 – Setting Record Security

Lesson H – Import

- Tutorial H.1 – Setting Up Import
- Tutorial H.2 – Performing the Import

Notes

Lesson E

Enterprise/Company Setup

This lesson describes the techniques used to maintain enterprise settings and to add, delete, and maintain individual company settings.

Source Text

People-Trak System Administration – Chapter 3

Tutorials

Adding/Deleting Companies: demonstrates how to add and delete companies. Also shows how the enterprise settings act as defaults for each new company.

Changing Logo and Report Appearance: shows how to modify the report header to fit your needs.

Changing Formats: demonstrates how data formatting works and how you can modify the formats for dates, phone numbers, and social security numbers.

Using External Programs: shows how to add external programs to the People-Trak main menu for execution from within People-Trak.

Tutorial E.1

Adding/Deleting Companies

This tutorial describes how to add and delete companies. This will only be applicable for your organization if you have licensed the multi-company feature.

1. Start People-Trak and select the Personnel Module.
2. Select the Enterprise Setup option on the Administration Menu. The Enterprise Setup dialog determines the default settings that will apply whenever a new company is created. Note the name and address information for the enterprise. Close the Enterprise Setup dialog.
3. Select the Company Setup option on the Administration Menu. The dialog is very similar to the Enterprise Setup dialog except that the Company Setup dialog provides the ability to add and delete companies. Let's add a company now.
4. Use the New Company option on the File Menu or the New Company button on the Toolbar to create a new company. A new company will be created using the current information stored on the Enterprise Setup dialog. The name and address information that you noted will be present for the new company. Note that a new company named NEW1 has been added to the list of companies.
5. You can change this company ID quite readily by positioning to the Company ID field. Change the ID from NEW1 to NEWGOO now. Note that the name in the text box and the list of companies is changed for you.

6. Move through the other tabs and note that the information from the Enterprise Setup dialog has all been moved into the new company. You can change any of this information to reflect any required differences in the new company. This includes name and address information, the company logo, and format settings. Close the Company Setup dialog.
7. Select the Enterprise Setup option and change the address for the enterprise. Then close the Enterprise Setup dialog and return to the Company Setup dialog. Note that the address information on the company "NEWGOO" is unchanged. Changing the enterprise information after a company has been created will not affect the company.
8. Using what you have already learned, create another new company. Note that this new company does indeed have the new name and address from the enterprise. Also, note that the company name is NEW1 again because NEW1 is no longer in use. Create another company and note that the company name is set to NEW2.
9. Companies can readily be deleted and we will readily delete these three companies now. However, in real practice, a company could contain a vast amount of information you may wish to keep. It would be a rare situation in which you would delete a company that contained valid information.
10. Delete the company named NEWGOO by first selecting that company. Then use the Delete Company option on the File Menu or the Delete Company button on the Toolbar to delete the company. You will be asked to confirm the deletion. Go ahead and delete the company. Now select and delete NEW1 and NEW2.
11. Close the Company Setup dialog and continue with the next tutorial.

Tutorial E.2

Changing Logo and Report Appearance

People-Trak provides flexibility in how report headers are formatted. You can set the positions of the company logo and the report title to suit your requirements. Here's how.

1. Select the Enterprise Setup option on the Administration Menu.
2. Position the cursor to the Options tab. Note that the Header Style is set to "right" and that the Logo Style is set to "left".
3. Use the Print button on the Toolbar to print an Enterprise Setup Listing. We are not interested in the information shown, but in the format of the header. As the settings indicated, the header is to the right and the logo is to the left. You can change this. Here's how.
4. Close the Document Viewer. Reverse the header and logo styles and close the Enterprise Setup dialog to save the changes. Now select Enterprise Setup again, position

to the Options tab and then print the report. This time header is to the left and the logo is to the right. Close the Document Viewer.

5. You can position the header and logo however you wish. In fact, you can actually position them over each other. This might make sense if you have a gray scale logo that you wish to treat similar to a watermark. Our sample logo is hardly a watermark, but let's try this anyway.
6. Set both the header and the logo to display on the left. Close the Enterprise Setup dialog to save the changes. Select the Enterprise Setup dialog again and print the report again. Note that the text of the header is displayed over the logo. Again, this may look ugly with this logo, but with a very light logo, the effect might be just what your organization wants. Close the Document Viewer.
7. The logo itself can be set on the Logo tab. Position to the Logo tab and see how it works. There are specific settings we will provide when you use your own logo and this is where you select your logo. Once selected, the logo is stored within the People-Trak database and the original file is no longer required.
8. To select a new logo from a file, select the "Select Logo" button. A file dialog is displayed that will allow you to search your PC for the logo file. Since we do not have another logo file available, let's press the Cancel button to close the file dialog. Now you know how to do it.
9. For those organizations that do not wish to use a Logo in reports, the default logo can be cleared.
10. Continue with the next tutorial.

Tutorial E.3

Changing Formats

People-Trak has various pre-defined formats for dates, times, social security numbers, telephone numbers and currency values. All data is stored in the People-Trak database unformatted. The formatting is applied when the data is retrieved and displayed on the screen or in reports. Because the formatting is applied when needed, it is possible to have different formats for different companies and to change the formats at any time. Let's do this now.

1. Use the Open Employee feature to select Donald Stern for editing. Position the cursor to the Personal screen.
2. On the Personal screen, note the format for telephone numbers, dates, and the social security number. Then close the record.
3. Select the Enterprise Setup option on the Administration Menu. Position to the Formats tab. At the Date Format field, select one of the other date formats. At the Phone Format field, select one of the other phone formats. At the Social Format field, switch to the 3-3-3 (Canadian) format. Close the Enterprise Setup dialog.
4. Open the record for Donald Stern and position to the Personal screen. Note the telephone number fields. They

are now formatted according to the selected format. The same is true for the dates and the social security number. The same will also be true for these fields when they are used in reports.

5. Remember, data is actually stored in non-formatted. It is formatted when it is actually displayed or printed. Thus, you can change the format at any time and the data will always be formatted correctly.
6. To demonstrate this, change the formats back to their original values using the Enterprise Setup dialog. Save the changes and then select Donald Stern again. Note that everything is back to how it was when we started this exercise.
7. Continue with the next tutorial.

Tutorial E.4

Using External Programs

You can use People-Trak to start up to three different programs other than People-Trak directly from the People-Trak menu. Here's how.

1. Select the Enterprise Setup option on the Administration Menu.
2. Position the cursor to the Options tab. Then position the cursor the External Program 1 field. Use the button adjacent to the field to activate the file dialog.
3. Use the file dialog to locate the EXPLORER.EXE program in the Windows directory on your PC. When located close the file dialog to return the directory path to the EXPLORER.EXE. You should see that path displayed in the External Program 1 field.
4. Close the Enterprise Setup dialog. When you close the dialog, an additional icon is added to the main menu. The icon will be a stylized "1" representing external program 1. If you select external programs 2 and 3, similar icons will be displayed for those programs.
5. Click on the new icon to launch the Explorer program. Then close the program to return to People-Trak.
6. The external programs option is useful for specialty programs that you like to run when you are in People-Trak. This can include Word, Excel or any other program that can be executed under Windows.
7. This tutorial and this lesson are complete. Close any open dialogs and exit People-Trak.

Lesson F

Module Setup

This lesson describes the techniques used to navigate between the various screens in a People-Trak module. It also describes the data validation and formatting features of People-Trak.

Source Text

People-Trak System Administration – Chapter 3

Tutorials

Changing Active Screens: show how to deactivate screens that the organization does not wish to use and how to reactivate those screens at any later time. Also shows the process to activate and deactivate sub-screens.

Changing Lookup Fields: demonstrates how to change the fields used to lookup record on the Lookup dialog and on Workflows.

Using Auto-Numbering: shows how to activate, customize, and use the auto-numbering feature.

Tutorial F.1

Changing Active Screens

People-Trak provides a number of screens and sub-screens within each module. You can elect to use any combination of these screens. If you deactivate a screen or sub-screen, you can reactivate it at any time. We'll show you how in this tutorial.

1. Start People-Trak and select the Personnel Module.
2. Use the Open Employee feature to open the record for Donald Stern. Review the Screens drop-down and note the number of screens present. Close the record for Donald Stern.
3. Select the Module Setup option from the Administration Menu. The cursor is positioned to the Screens tab.
4. Use the mouse to single-click and disable three or four screens. A screen is disabled if the check box is unchecked. When you have deactivated some screens, close the Module Setup dialog.
5. Use the Open Employee feature to open the record for Donald Stern. Review the Screens drop-down and note the number of screens present. The screens that you have deactivated should no longer be listed. Close the record for Donald Stern.
6. Select the Module Setup option from the Administration Menu. The cursor is positioned to the Screens tab.
7. Reactivate each of the screens that you have deactivated by setting the checkbox.

8. Position to the Personal screen and place the mouse over the text part of the entry, not the check box. Now double-click on the text. The Treeview control will open up and the sub-screens will be listed. The sub-screens also use checkboxes for activation and deactivation.
9. Use the checkbox to deactivate some of the sub-screens on the Personal screen. When complete, close the Module Setup dialog.
10. Open a record for Donald Stern and position to the Personal screen. Note that the buttons for the sub-screens that you have deactivated are longer shown. Without the button, you cannot display the screen. Close the record for Donald Stern.
11. Use the Module Setup dialog to reactivate the sub-screens and then close the dialog.
12. Using the Module Setup dialog, screens and sub-screens are made available or unavailable for all users throughout People-Trak. If you disable a screen, it is disabled in every place where a list of screens would be displayed. It is possible to activate and deactivate screens by user. This will be explained in the User Setup lesson.
13. Continue with the next tutorial.

Tutorial F.2

Changing Lookup Fields

The fields used to lookup records on the first tab of the Lookup dialog as well as those used for Workflows are preset within each module, but can be changed at any time. This is how you do it.

1. Use the Open Employee feature to start the Lookup dialog. Note that the order of the lookup fields on the ID and Name tab is Employee ID, Employee Last Name, First Name, and Hire Date.
2. Press the Search button to select a group of records. Note that the four fields in record grid match the lookup fields by name and order. Close the Lookup dialog.
3. Select the Address workflow from the Activities Menu. Note that the two lookup fields match the first two fields shown on the ID and Name tab on the Lookup dialog. Close the Address workflow.
4. Select the Module Setup option from the Administration Menu and position the cursor to the Lookup tab. The Lookup tab provides four fields in which to record the fields to be used for lookup. Note that the list matches the list you verified in the first few steps. Let's change the list now.
5. If you are the type of person that remembers employee names rather than employee numbers, you may find that having the Employee ID as the first lookup field forces you to move the cursor down one field so that you can perform a lookup by last name. Let's fix that situation by changing the order of the first two fields.

6. Use the button adjacent to Lookup Field 1 to display a list of the fields. Find the Last Name field and select it. This will make the Last Name field the first lookup field (as well as the second lookup field).
7. Change the second field to the Employee ID. Close the Module Setup dialog.
8. Use the Open Employee feature to start the Lookup dialog. Note that the order of the lookup fields on the ID and Name tab reflects the changes you have made. Press the Search button to select a group of records. Note that the four fields in the record grid match the modified order as well. Close the Lookup dialog.
9. Select the Address workflow from the Activities Menu. Note that the two lookup fields have been changed here as well. Close the Address workflow.
10. Use the Module Setup dialog to reset the original lookup field order. In this tutorial, we modified the first two lookup fields. You can actually change all four to any desired value and you can change again at any time.
11. The lookup field changes made with the Module Setup dialog apply to all users throughout the module. It is not possible for each user to have personal lookup preferences.
12. Continue with the next tutorial.

Tutorial F.3

Using Auto-Numbering

People-Trak provides an extensive auto-numbering feature that allows you to automatically assign employee numbers, applicant numbers, etc. when a record is first created. These numbers can contain optional prefix and suffix values. The feature is easy to setup and use. Here's how.

1. Use the New Employee feature to create a new employee record. Note that a new, blank record is automatically created and that no employee number is assigned. Close the record.
2. Select the Module Setup option from the Administration Menu and position the cursor to the AutoNumbering tab. The tab contains two sections: one to activate auto-numbering for the Personnel module and set the optional prefixes and suffixes and another to set the starting number for each company.
3. Use the checkbox to activate auto-numbering. Then, set the starting number for the DEMO company to 1000. Close the Module Setup dialog.
4. Use the New Employee feature to create a new employee record. Note that a new, blank record is automatically created and that employee number 1000 is automatically assigned. Add a last name to the record and then save the record.

5. Use the Module Setup dialog to add a prefix to the auto-numbering format. Use the phrase "ABC-" without the quotes, of course.
6. Now create a new employee again. This time, the employee number will be the following:

ABC-1001
7. Add a last name to the record and then save the record.
8. Use the Module Setup dialog to add a suffix to the auto-numbering format. Use the phrase "-XYZ" without the quotes, of course.
9. Now create another new employee. This time, the employee number will be the following.

ABC-1002-XYZ
10. Add a last name to the record and then save the record.
11. You can reset the starting number at any time and it will skip any numbers that are in use and reuse numbers that are not. Let's try this.
12. Delete the employee we created that numbered 1000.
13. Use the Module Setup option to remove the prefix and the suffix and to reset the starting number for the DEMO company to 1000.
14. Create a new record. Note that employee number 1000 is reused because it is available. This is a nice feature if your organization insists on using all available numbers. Sometimes a record is started, saved, and then deleted. You can reset the number and be assured that the very next available number in the sequence will be used, even if that number was used and then deleted.
15. Auto-numbering can be activated or deactivated at any time. Use the Module Setup option to deactivate the feature now. All you need to do is set the checkbox. If the checkbox is not checked, the starting number and other values are ignored.
16. If auto-numbering is activated, it applies to all companies for that module. You can have entirely different number ranges within each company, but the prefix and suffix will be the same. It is not possible to have one company with auto-number active and another without. However, each module can activate or deactivate auto-numbering separately. Thus, it is possible to use auto-numbering for applicants, but not for employees.
17. This tutorial and this lesson are complete. Close any open dialogs and exit People-Trak.

Lesson G

Security Setup

This lesson describes the techniques for establishing user security.

Source Text

People-Trak System Administration – Chapter 3

Tutorials

Securing Companies and Modules: shows how to secure companies and modules.

Securing Menu Options: show to secure menu options for both administrative and other menus.

Setting Field Security: demonstrates how to set the three different levels of field security.

Using Simple Record Security: shows how to set simple record security.

Tutorial G.1

Securing Companies and Modules

1. Start People-Trak and select the Personnel Module.
2. Select the Security Setup option on the Administration Menu. When you first enter the Security Setup dialog, the user ID you entered People-Trak with becomes the current user record being edited. You can use the list of users to select any other user for editing.
3. By default, the DEMO user is set to be an administrator. Administrators are not subject to any of the security features in People-Trak. You can make security settings for an administrative user, but they will not be honored. On the General tab, change Administrator checkbox for the DEMO user to “Off”.
4. Close the Security Setup dialog. Use the Select Company option on the File Menu to display a list of the companies to which you currently have access. There should be three: ACTIVE, ARCHIVE, and DEMO. Close the dialog.
5. Select the Security Setup option and position to the Database (company) tab. The tab shows a list of the companies that have been defined. If you have licensed the multi-company feature, this list will be dynamic and will change as companies are added or deleted. If you have not licensed the multi-company feature, this list will contain the standard three companies: ACTIVE, ARCHIVE, and DEMO.
6. Deactivate ACTIVE and ARCHIVE by setting the checkboxes. Then close the Security Setup dialog.

7. Use the Select Company option on the File Menu to display a list of the companies to which you currently have access. There should be just one now: DEMO. Close the dialog. Given that you can only select a company that is shown, you are not restricted to the DEMO company.
8. Select the Security Setup option and position to the Database (company) tab. Restore access to ACTIVE and ARCHIVE. Close the Security Setup dialog and confirm that the companies have been reactivated. Close all dialogs.
9. Use the Exit Module option on the File Menu to return to the Select Module dialog. One after another, select each module to verify that you have access. Once you enter a module, simply use the Exit Module option to return to the Select Module dialog. When you have verified that you have access to each module, return to the Personnel module.
10. Select the Security Setup option and position to the Module tab. Turn off the Safety Management module and close the Security Setup dialog.
11. Use the Exit Module option on the File Menu to return to the Select Module dialog. The Select Module dialog is not dynamic. This means that it always shows all of the modules, even those to which you do not have access. This does not mean that the modules are not secured. Let's find out.
12. Select the Safety Management module. What happens? You are denied access because you cannot access a secured module. Try one of the other modules. You will be granted access. Return to the Personnel module.
13. Use the Security Setup dialog to reactivate the Safety Management module. Close the dialog.
14. Continue with the next tutorial.

Tutorial G.2

Securing Menu Options

The Security Setup dialog provides two different tabs for securing menu options. The Administration tab provides a list of the menu options on the Administration menu. This tab remains the same regardless of which module you are in. The Menu tab provides a list of the menu options within the module and differs with the module you are in. Both tabs work in the same way.

1. Select the Security Setup option and position to the Administration tab.
2. Deactivate the Enterprise Setup, Module Setup, and User Setup programs. Then exit the Security Setup dialog.
3. Click on the Administration Menu and leave the menu displayed. Note that the three options you have just secured are not disabled or “grayed out”. Because they cannot be selected, they are secure and you cannot use them. (Please note that had you secured the Security

Setup option, we would be done for the day as we would not have been able to return to the Security Setup dialog to keep working.)

4. From the menu, select Security Setup. Position to the Administration tab and reactivate the three options.
5. Position to the Menu tab. This tab provides two lists. The first list is a list of the menus (other than the Administration Menu). The second list is a list of the menu options on the menu currently selected. Lets make a few settings and try it out.
6. On the File Menu, disable the New Record and Delete Record options. On the Tools Menu, disable the Field Customization option. On the Screens Menu (actually a list of the screens) disable a few screens. Finally, on the Tables Menu (actually a list of the tables that can be edited, disable a few tables. Close the Security Setup dialog. Now, let's confirm that the security works.
7. Click on the File Menu and leave the menu displayed. Note that the New Record and Delete Record options are disabled and cannot be selected. Clear the File Menu.
8. Click on the Tools Menu and leave the menu displayed. Note that the Field Customization option is disabled and cannot be selected. Clear the Tools Menu.
9. Select the record for Donald Stern. The screens that you have disabled will not be in the Screens dropdown and cannot be displayed. Close the record for Donald Stern.
10. Select the Table Edit option from the Tables Menu. When the list of tables that can be edited is displayed, note that the tables you disabled are not listed and cannot be edited. Close the Select Table to Edit dialog.
11. Use the Security Setup dialog to restore access to all of the menu options you disabled. Close the Security Setup dialog when complete.
12. Continue with the next tutorial.

Tutorial G.3 Setting Field Security

Unlike the other security settings field security has three different states. Fields can be set to editable, viewable but not editable, and not viewable. Here's how to do it.

1. Select the record for Donald Stern for editing. Position the cursor to the Last Name field on the Personal screen. The field is completely editable. Position the cursor to the First Name field. The field is completely editable. Now, let's secure them.
2. Close the record for Donald Stern. Select the Security Setup option and position the cursor to the Screen/Field tab. As with the Menu tab, this tab has two lists. The left list is a list of the screens and the right list is a list of the fields on the current screen. You can navigate through the screens to find the fields you want.

3. On the Personal screen, position the cursor to Last Name field. Use the mouse to toggle the security status from Full Access to Display Only.
4. On the Personal screen, position the cursor to the First Name field. Use the mouse to toggle the security status from Full Access to No Access.
5. Close the Security Setup dialog.
6. Select the record for Donald Stern for editing. Position the cursor to the Last Name field on the Personal screen. This field was set to Display Only status. You can put the cursor to the field, but you cannot edit the field.
7. Now position the cursor to the First Name field. Whoops, its not there. We set this field to "No Access" and thus the field cannot be seen or edited.
8. Close the record for Donald Stern.
9. Use the Security Setup dialog to reactivate the fields that have been secured.
10. Continue with the next tutorial.

Tutorial G.4 Setting Record Security

People-Trak provides two different types of record security: simple security and advanced filter security. This tutorial will show how to use simple security.

1. Select the Open Employee feature. Use the Search button to generate a list of all of the records in the DEMO company. Note the list and the number of records indicated at the bottom of the dialog. Close the dialog without selecting a record for editing.
2. Select the Security Setup option and position to the Record tab. This tab contains a list of all the records in the company. Within each module, the list will be different. For the personnel module, the list will be employees. For the applicant module, the list will be applicants.
3. Using the checkboxes, disable a group of employees. Close the Security Setup dialog.
4. Select the Open Employee feature. Use the Search button to generate a list of all of the records in the DEMO company. This list will now be subject to the security just established. Note the list and number of records indicated at the bottom of the dialog. The list and the count should reflect the records you have secured. Close the dialog without selecting a record for editing.
5. Use the Security Setup dialog to reactivate the employee records you secured. Then close Security Setup dialog.
6. This tutorial and this lesson are complete. Close any open dialogs and exit People-Trak.

Lesson H

Import

This lesson demonstrates how to use the export feature to export data for use in other products and application tools. It also includes instructions for importing files into People-Trak that have been created from other applications.

Source Text

People-Trak Basics – Chapter 10

Tutorials

Setting Up Import: demonstrates how to setup a file for import.

Performing the Import: shows how to perform an import and to verify the results.

Tutorial H.1

Setting Up Import

In an earlier lesson we saved an export file that was modified. We will now demonstrate how to setup an import specification that will bring information into People-Trak. We will be using the file you created in tutorial 23.1 for this example.

1. Select the Import option on the Administration menu. The Import Specifications dialog is displayed.
2. Use the New Specification option on the File Menu or the New Specification button on the Toolbar to start a new import specification. The Import dialog is displayed.
3. The first task required when creating an import specification is to identify the file to be imported. Lets do that now.
4. Position the cursor to the File Type field. Use the button to select the “TAB” file type. Note that the caption on the field “File or Database” is changed to “Directory Name” and the caption on the field “Table or Worksheet” is changed to “File Name”.
5. At the “Directory Name” field, use the button to start the “Select Path” dialog and select the path to “C:\PEOPLETRAK”.
6. At the “File Name” field, enter “TEST2”, or use the button to display a list of the TAB delimited files that exist in C:\PEOPLETRAK.
7. Verify that the Header checkbox is checked and the press the “Connect” button. The file will be opened and a list of the fields in the file will be displayed beneath the Import Field column on the grid. To finish setting up the import, we need only map the fields in the file to the actual fields in People-Trak. Here’s how.

8. Position the cursor to the People-Trak column for the first row in the grid. Use the button to display a list of fields and select the “Last Name” field from the list of fields on the Personal screen.
9. Complete the other fields in the list in the same way. As a hint, the People-Trak field names are the same as the Import Field names because the headings were taken directly from People-Trak.
10. If you are ever uncertain about the contents of a field when determine which fields map to which fields, you can use the “View Sample Data” button. Try it now. Position the cursor to the City field and press the button. The sample data will show a collection of the cities in the database along with some other statistics. Close the Sample Data dialog.
11. When all fields have been mapped, continue with the next tutorial.

Tutorial H.2

Performing the Import

We are now ready to import the data in the TEST2 file back in to People-Trak. You will recall that we changed the employee ID for Donald Stern and the address for Jonathan Strauss in that file. After import, that information in People-Trak should reflect those changes.

1. Use the Run Import option on the File Menu or the Run Import button on the toolbar to start the import.
2. The import will be processed. A progress bar will indicate the records as they are being imported. When the import is complete a summary report is displayed in the Document Viewer. Close the Document Viewer. Now it is time to verify the results of the import.
3. For all records but Donald Stern and Jonathan Strauss, current data was imported over identical existing data. There is no way to validate. For Jonathan Strauss, however, the address was changed.
4. Select the record for Jonathan Strauss. Position to the Address 1 field on the Personal screen. Note that the address has indeed been changed to “XXX”. Close the record for Jonathan Strauss.
5. Use the Open Employee feature to display all of the records (just click on the Search button). Click on the heading for the Last Name field on the grid to sort the records by Last Name. Note that there are now two records for Donald Stern and that one has the original ID and the other has the ID “9999”. Why?
6. You will recall that we changed the employee ID for Donald Stern within Excel. The import process compares employee ID’s during import. If there is no record with a matching ID, the record is assumed to be an “add” rather than a “change”. We did not change the ID for Jonathan Strauss and thus the existing record was selected and changed. We did change the record for Donald Stern and

thus a new record was created. The new record for Donald Stern will only contain those fields that were actually imported.

7. Select the "9999" record for Donald Stern. Note that on the Personal screen, only those fields that were imported are shown. You can move through all of the screens and note that there is no additional information. Import identified the second Donald Stern as an entirely new employee and created a blank record for him. Then, the fields in the import file were recorded.
8. Close the record for Donald Stern.
9. This tutorial and this lesson are now complete. Exit People-Trak.