

Basics Series-4007

# Form Templates

Version 9.0

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# Notes

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# Workbook

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## Form Templates

The Form Template allows you to create complex forms for output purposes. You can easily add fields, frames, grids and other objects to create output documents with any information from within People-Trak. You have the option of selecting a PDF form as a background. Then, using a drag and drop tool, you can position the fields and other objects at the appropriate location on the form. When the custom form is complete, you can create documents based on the custom form by using the Forms option on the Documents menu. A special option in this feature enables you to decide if you wish to actually print the form background, if there is one. If you have preprinted forms such as numbered forms, you can use the imported form to layout and maintain the form. However, at print time, you can cause the data only to be printed, thus placing the appropriate data at the appropriate locations on your form without the form background. You will need to have your pre-printed forms in the printer and should have already had the custom form's Print Image check box cleared before generating the form.

When the Form Templates option is selected on the Templates menu, the screen shown below is displayed.

The screenshot shows the 'Form Templates' application window. The title bar reads 'Form Templates'. The menu bar includes 'File', 'Edit', and 'Help'. The toolbar contains various icons for file operations and editing. The main window is divided into several sections:

- Form Details:** This section contains fields for:
  - Form Name: Appraisal Review History
  - Category: Appraisal
  - Paper Size: Letter
  - Width: 8.50
  - Height: 11.00
  - Margins: 0
  - Print Form:
- Objects:** A table with columns for Object Type, Object Name, Caption, Left, Top, Width, Height, Modifier, and Field Modifier. The table is currently empty.
- Form List:** A list of form templates on the left side, including 'Appraisal Review History', 'Attendance Balances', 'Attendance Balances with History', 'Benefits Enrollment', 'Compensation History Form', 'Education and Experience', 'Emergency Contacts', 'Event History Form', 'Future Benefits Enrollment', 'Name and Address', 'Personal and Status Information', and 'Status History'.
- Buttons:** On the right side, there are buttons for 'Preview', 'Select Form', 'Clear Form', 'Edit Help', and 'Properties:1'.

## Form Details

Form Details include naming the form template, assigning it to a category and defining the paper size, page width, page height and margins.

**Note:** On full page forms, this Margins should be set to 0.

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# Objects

The following are object types available to use on a form template. Descriptions for each object type are also defined.

## Border

Used for placing a border around the form. When selected, the Form Name is defaulted as the Caption to use for the form but can be overwritten

## Heading 1

Used to place a heading on the form with a colored background. In the default People-Trak style, this heading is in 14-point text with a background of the dark color associated with the selected color scheme.

## Heading 2

Used to place a heading on the form with a colored background. In the default People-Trak style, this heading is in 12-point text with a background of the dark color associated with the selected color scheme.

## Heading 3

Used to place a heading on the form with a transparent background. In the default People-Trak style, this heading is in 14-point text.

## Heading 4

Used to place a heading on the form with a transparent background. In the default People-Trak style, this heading is in 12-point text.

## Field

Used for placing actual fields on the form.

## Frame

Used to place and name a frame around fields in order to group them on the form. Field object rows that follow the Frame object row will be placed in the frame. When a grid object is selected, fields from that grid are defaulted as field object rows that are displayed vertically inside the frame.

## Grid

Used to place a grid on the form. Field object rows that follow the Grid object row will be placed in the grid. When a grid is added and you select the grid name in the Object Name field, all fields in that grid are automatically added in the rows that follow the grid. You can then choose to delete one or more of the fields and/or rearrange the fields.

**Note:** You cannot mix fields from different grids in one grid on the custom screen.

## Label

Used to place non-formatted label text on the form in order to provide directions or added information. This object is edited with the Simple Editor.

## Line

Used to place a line on the form.

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## Picture

Used to place a picture on the form.

# Defining and Updating Object Properties

You can update an object's properties in either the main Form Templates screen or preview mode. On the main screen, highlight the object in the grid and then click the Properties button. In preview mode, select the object and then press F1. Both of these methods display the Object Properties screen for the selected object. Each object type has its own unique Object Properties screen with the object properties that pertain to that object.

The following are field descriptions for all fields that can be on an Object Properties screen. The actual name of the field will vary slightly based upon the object properties screen on which it is being displayed. Several of these fields are also available on the main Form Templates screen.

## Object Type

The type of object. This field is for display only.

## Object Name

The name of the object. This field is only used with the Field and Grid object types and is display only because the object names can only be changed on the main Custom Forms screen.

## Object Caption

The caption to display for the object on the screen.

**Note:** The following Left, Top, Width and Height fields are in pixels.

## Left

Allows you to move the object's location horizontally on the screen. The reference point for this value is the left-most side of the object.

## Top

Allows you to edit the object's location vertically on the screen. The reference point for this value is the top side of the object.

## Width

Allows you to adjust the width of the object. When you increase the width, the right side of the object will move to the right. When you decrease the width, the right side of the object will move to the left.

## Height

Allows you to adjust the height of object. When you increase the height, the bottom of the object will move downward. When you decrease the height, the bottom of the object will move upward.

## Alignment

For a Field object, this is the alignment of data in the field. For all other objects, this is the alignment of the object's caption. This field is supported by the Select Alignment popup. The alignment of the Field object's caption is set in the Field Settings frame that is unique to only fields.

## Row Modifier

For a Field object, this is the row modifier of the field and is supported by the Select Row Modifier popup. For a Grid object, this is the number of rows in the grid, including the caption row. This field is not used with the other object types.

**Note:** The Select Row Modifier popup screen shows codes 1-10, but higher row numbers can be manually entered as well. The popup also allows you to use “+” to access the last row on the grid, **New 1** to insert a new top row and **New +** to insert a new bottom row.

## Field Modifier

For a Field object, this is the modifier that determines which part of the field is to be included on the form. Field modifiers can only be used with date and currency fields. This field is supported by the Select Field Modifier popup. If you try to select a field modifier for other field types, a message will appear stating that there are no valid modifiers.

## Field Settings

The Field Settings frame and its settings are only applicable for Field objects and are only shown when editing the properties of a Field object.

**Note:** The following Caption Left, Caption Top and Caption Width fields are in pixels.

### Caption Left

Allows you to adjust the location of the field’s caption horizontally. The reference point for this value is the left side of the caption.

### Caption Top

Allows you to adjust the position of the field’s caption vertically. The reference point for this value is the top side of the caption.

### Caption Width

Allows you to adjust the width of the field’s caption. The caption will expand to the right when edited.

### Caption Alignment

The alignment of the field’s caption. This field is supported by the Select Alignment popup.

## Using a Background Form

### Selecting a Background Form

The Select Form button allows you to select the background PDF form for the form. The Select File popup supports this field and allows you to select a PDF file.

**Note:** Only PDF forms can be selected. Contact your Support Representative if you need assistance getting a form into PDF format.

### Clearing a Background Form

The Clear Form button allows you to clear the background PDF form from your form.

### Print Form

A check box that allows you to specify whether or not the background form should be printed when printing the forms. Select this check box if you want to print the background form when

printing the forms. Clear the check box if you do not want to print the background form. If you are not using pre-printed forms, you would want to print the background form. If you are using pre-printed forms, you would not want to print the background form.

## Using Preview Mode

The Preview feature allows you to easily place the selected objects on your form template. Preview mode is accessed from the main Form Templates screen by clicking the Preview button.

When you enter preview mode for a form template, the Custom Form Editor screen is displayed and has a list of objects in the Object dropdown and the custom form on the right. A sample Custom Form Editor screen is shown below.

The screenshot shows the 'Custom Form Editor' window. The title bar reads 'Custom Form Editor'. Below the title bar is a menu bar with 'File', 'Format', and 'Help'. A dropdown menu is open, showing 'Grid - Experience'. To the right of the dropdown are several icons for grid manipulation and a checked checkbox. The status bar indicates 'Width: 721 Height: 961'. The main area contains a form template with the following sections:

**Education and Experience**

Employee Number   
Employee Name

**Education**

Degree	Course of Study	School	Graduate	Graduation Year	Years	GPA	Tuition Assistant

**Experience**

Company	Start Date	End Date	Title	Salary	Per

There are several ways to edit the layout of your screen using preview mode. The details of every object on your screen can be edited. This section covers how to select and edit objects in preview mode.

## Selecting Objects

You can select a single object by doing one of the following:

- Select the object name in the Object dropdown.
- Click the object itself on the screen on the right.

You can select multiple objects by doing one of the following:

- Hold down the CTRL key while selecting the individual objects.
- Using the mouse, right-click on a field object. This will select both the Field and its Caption
- Select a point to the upper left of the first desired object. Hold down the shift key while pressing the left button on the mouse. While doing so, drag the provided frame from the upper left starting position until all desired objects are within the frame (i.e. lassoed).

Then release the key and mouse. This will select all the “lassoed” objects, just as if they were selected individually.

## Editing Objects

After objects have been selected, there are several different ways to edit them. They are:

- Move or size the object(s) using the mouse.
- Move or size the object(s) using key combinations.
- Move or size the objects using the alignment tools on the Format menu and Tool Bar. (This is only available when multiple objects have been selected.)
- Edit object properties using the F1 key. (If multiple objects have been selected, the first object selected is edited.)
- Aligning objects to the left and right margins of the screen using the ‘snap to edge’ feature

Each of these methods is described below.

### Mouse

The most common way to edit objects is to simply click-and-drag an object to the position or size you’d like. When you first click on an object to select it, you will see the object highlighted in red with red squares in each of the corners and on the sides.

If you move the cursor to anywhere inside the object, the cursor will turn to two crossed lines with arrows pointing in four directions. An example of this is shown below:



When the cursor looks like the above example, you can drag and drop the object to any location you desire.

If you move the cursor to one of the red squares around the outside of the object, the cursor will turn to a line with arrows on either end. This line will either be vertical, horizontal or diagonal depending on which red square you are hovering over. It is indicating what direction the object will be sized. For example, the following example shows that the object will be sized vertically.



When the cursor looks like the above example (or one of the other two direction lines), you can drag the object to be the size you desire and then release.

**Note:** The cursor will vary based on the operating system being used. For example, the cursors shown above are in black, whereas these cursors are white outlined in black in the Vista operating system.

### Key Combinations

After an object has been selected, SHIFT + ARROW keys will change the size of the object, while CTRL + ARROW keys will move the object. These hot keys are much more precise. It is best to move the object to the general area and size using the click-and-drag procedure, and then specify the location and size using the hot keys.

### Alignment Tools

There are several alignment tools available in preview mode. These tools are found both on the Format menu and on the Tool Bar. These tools are only available after you have two or more objects selected. The first object selected is the controlling object. The subsequent

objects selected will be aligned to the controlling object. A description of each tool is given below.

- Align to Left
- Align to Right
- Align Spacing
- Align Height
- Align Width
- Align to Top
- Align to Bottom

Align to Left aligns objects to the left side of the controlling object. Align to Right aligns objects to the right side of the controlling object. Align Spacing sets spacing between the objects to be the same as the spacing between the controlling object and the second object selected. Align Height sets height of the objects to be the same as the controlling object. Align Width sets width of the objects to be the same as the controlling object. Align to Top aligns objects to the top of the controlling object. Align to Bottom aligns objects to the bottom of the controlling object.

## Snap to Edge

If you would like to align an object, such as a grid, within the left and right margins of your form, the snap to edge feature provides a means for doing so. First, place your object in the desired area of the form, close to the edge. Using either keystrokes or your mouse, move the object towards the left or right margins of your form. Once the object is within 6 pixels from the edge of the form, it will automatically move or ‘snap’ to the edge that you moved it towards.

**Note:** Please be aware that this feature cannot be turned off. When moving objects within your custom form, if the object is moved close enough to the left and right edges, it will ‘snap’ and line up with the margin.

## Saving and Restoring

When you are doing a lot of work in preview mode, we recommend that you save your work periodically using the Save option on the File menu.

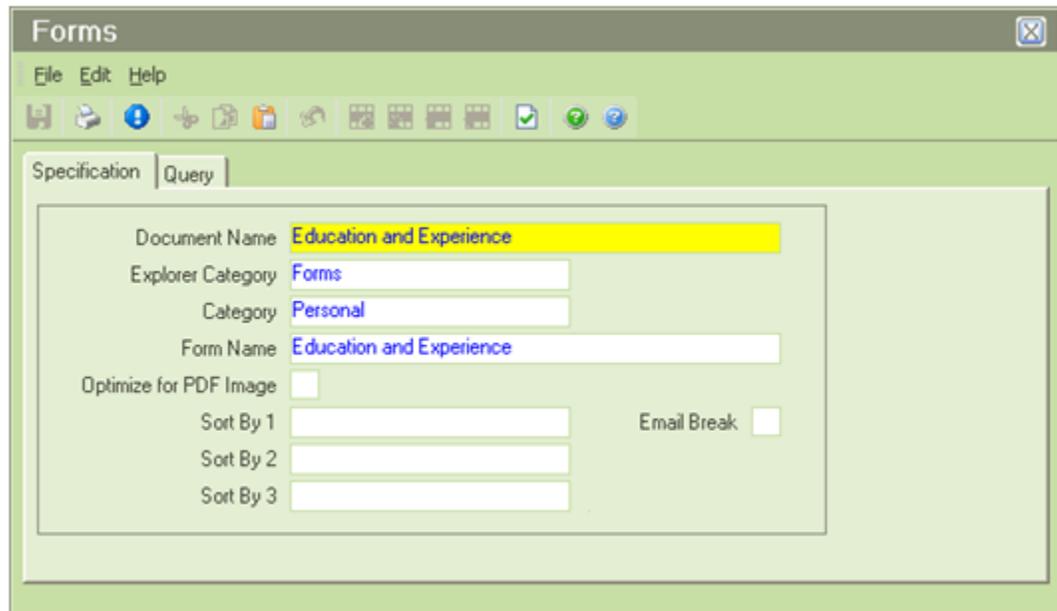
## Use in Form Documents

A custom form is used in a form document by selecting the form in the Form Name field of the Forms screen, which is accessed from the Forms option on the Documents menu.

The Forms screen uses a two-tab screen. The Specification tab is used to define the specification. The Query tab is the standard query tab that is used to determine the records for which forms are to be produced.

### Specification Tab

The Specification tab is used to assign the form document to categories, specify the form to use and set up sorting for the form document.



- Document Name** A unique name for the form specification. This name is used when retrieving the form document.
- Explorer Category** The Explorer category into which the form document is to be placed. When a large number of documents are defined, the category is quite helpful in organizing the documents into meaningful groups. The Explorer organizes the documents you have created by this field. A table that contains all of the existing explorer categories supports this field. You can use the table or enter a new category name.
- Category** The category into which the form document is to be placed. The form document can then be found under that category in the Categories pane of the Organizer desktop and in Category Documents within a record. This category can also be used to secure documents. A table that contains all of the existing categories for the current module supports this field. You can only select a valid entry from the table.
- Form Name** The name of the form template to be used for this form document. A form popup supports this field.
- Optimize for PDF Image** A check box that allows the user to change the image background for a form from high resolution EMF to a JPG. This is due to the fact that the high resolution EMF files (which are used for form backgrounds) can sometimes have artifacts or areas where the form image does not match the original PDF that was attached.
- Note:** When producing Forms with background images with the Optimize feature in use, the production time will be slightly slower.
- Sort By 1, 2, 3** Three sort fields that determine how the forms are to be sorted. The sorting is performed in the order entered. For example, if you wish to sort forms by name within department, enter the Department Code field name in the Sort By 1 field and the Full Name field name in the Sort By 2 field. The sort order for all three sorts is ascending and cannot be changed.



form may need to be set for PDF optimization (use JPG instead). Otherwise, you may inadvertently archive documents with artifacts which limit their readability documents.

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# Lesson 1

## Form Templates

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This lesson covers the steps required to create a form template, which allows you to easily output People-Trak data on any form. It also demonstrates how to create complex custom forms for reporting purposes.

### Tutorials

**Create a Form Template:** shows how to create a form template by selecting the PDF form to use and the fields to be included on the form.

**Using Preview Mode:** demonstrates how to move some of the objects you have placed on the form template.

**Object Properties:** demonstrates how to make changes to the location and size of objects on a form template by using the Object Properties screen.

**Produce a Form Document:** shows how to produce a form document that uses the form template and a query you specify.

**Create a Form Template 2:** demonstrates how to create a complex custom form for reporting purposes.

**Create a Form Template 3:** reviews how to create a form template by selecting the PDF form to use and placing fields to be included on the form.

**Create a Form Template 4:** shows how to create a form template by selecting an edited PDF form to use and the fields to be included on the form.

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## Tutorial 1.1 – Create a Form Template

A form document allows you to easily output People-Trak data on any form you desire. The first step in preparing a form document is to create the form template on which it is based. Let's get started.

1. Start People-Trak by double-clicking on the **People-Trak Trainee** icon on your desktop (or as instructed).

The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.
3. Click **OK**

The Login screen is displayed.

4. In the **User ID** field, enter **DEMO**.
5. In the **Password** field, enter **DEMO**.

The Organizer desktop is displayed with the Personnel Management module selected.

6. On the **Templates** menu, select **Form Templates**.

The Form Templates screen is displayed.

7. On the **File** menu, select **New Form Template** or on the **Tool Bar**, click the **New Form Template** button to start a new form template.

A default name will be assigned. The name is NEW-#, where “#” is the next available, unused number

8. In the **Form Name** field, enter **Emergency Contact Form**.
9. In the **Category** field, select the **Personal** category.
10. Leave the **Paper Size** field set to **Letter** because that is the correct size of our form.

The Page Width and Page Height fields are informational and show those dimensions in inches.

11. For this tutorial, leave the **Print Form** check box selected so the background form will be printed. Our form takes up the entire page, so we need to make sure the margin boundary is set to 0.
12. In the **Margins** field, click the popup.

As you can see, you can select a margin from 0 to 1 inch in ¼ increments.

13. Select **0**.

Now, let's select the PDF form we want to use.

14. Click the **Select Form** button to start the process.

The Select File screen is displayed. Only PDF files will be shown as you browse.

15. In the **PT9\ SAMPLES** directory of your local People-Trak drive, select the file named **EMERGENCY CONTACT FORM.PDF**.

The Print Form field enables a powerful feature within People-Trak. You need to select a background form, as we have, to allow you to align fields on the form. However, it is not necessary to actually print the background form when the form is produced. For example, if you create a form for payroll checks, you use a generic background form to align the fields. When the checks are actually produced, you place pre-printed forms in the printer and do not print the background form itself. If you are not using pre-printed forms, you place blank paper in the printer and print both the data and the background form.

16. Click the **Preview** button and take a look at the form so far, noting the format and the fields that need to be filled in.
17. Close preview mode and return to the **Form Templates** screen. We will revisit preview mode once we have some objects to manipulate.

The Objects grid is where the fields that are to be placed on the form are selected. You can select as many fields as you need. You can use row and field modifiers as necessary to select the specific fields you need.

18. In the **Object Type** column on the first blank row in the grid, select the popup button to display a list of the valid object types.

As you can see, there are several object types that we can use for a form template. The template we are currently working on will be using field objects. We will take a look at other object types in a future lesson.

19. Select the **Field** object.
20. In the **Object Name** column, click the popup button to display a list of the fields in the Personnel Management module. Select the **Full Name** field.

The Caption column is automatically set to the caption currently associated with this field. (In the case of the Full Name field, the caption is set to Full Name.) This can be changed, if desired, but we have no need to make a change at this time, so just leave the field as is.

The Left and Top fields are set to -1 to let the system know that these coordinates need to be calculated. This calculation will happen when first going into preview mode or when saving. The Width and Height fields contain the width and height of the field in pixels. We'll learn more about these attributes later.

To save you some time, here is a list of the rest of the fields needed for our form.

21. For **Object Type**, select **Field** and select the following **Field Names**:

**Address 1**  
**Address 2**  
**City**  
**State**

**Zip Code**  
**Contact 1 Name**  
**Contact 1 Relation**  
**Contact 1Address 1**  
**Contact 1Address 2**  
**Contact 1City**  
**Contact 1State**  
**Contact 1Zip**

22. Select the **Preview** button.

The names of the fields you have placed on the form are listed in the Object dropdown. The fields themselves are listed down the left side of the form, but that isnt where we need them to be. We need to place the field objects into their respective positions on the form, which is a task for the next lesson.

23. Remain in preview mode and continue with the next tutorial.

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## Tutorial 1.2 – Using Preview Mode

In the previous lesson, we used preview mode to take a peek at what our form template looked like. Now we are going to use it to actually move some of the objects you have placed on the form template.

1. Select **Preview** to view our form template in preview mode if you have not already done so.

Let's start by using the mouse to drag an object.

2. Click on the **Full Name** field to activate it. Then click and drag it down to its respective place on the PDF form.

When you moved the Full Name field, the caption did not move with it. There is actually a way to have the field and its caption move together if you choose. Let's try it.

3. First, move the **Full Name** field back down to where it used to be, lined up with the **Full Name** caption. Click in the empty area off to the right of the **Full Name** field to deselect it.
4. This time, click on the **Full Name** field using the right mouse button.

Both the Full Name field and its caption are now highlighted.

5. Click and drag the **Full Name** field and its caption so that once again, the field is placed in its proper location on the form.

You will notice that the caption is overlaying the text for that field on the form. We will remove all captions once we have all of our fields further down the road.

Now that the Full Name field has been moved, you can see that we have some work ahead of us, moving each field to where it belongs. We can make this process a bit faster by moving more than one object at a time.

The trick to dragging multiple objects is to select them all first. Multiple objects are selected by clicking on them while holding down the CTRL key. With the Field object you can automatically select its caption as we have seen by right clicking on the field. This time let's do the same thing by using the CTRL key with the Name field for our emergency contact.

6. Click on the **Name** field and then hold down the **CTRL** key and click on the caption for the **Name** field.

Both the field and the caption are selected. But did you know that this works with multiple fields and captions as well?

7. While still holding down the **CTRL** key, select the **Relation** field and its caption.
8. Now that these fields and captions are selected, move these fields so that the **Name** field and its caption are properly placed on the form. As you can see, the **Relation** field and caption are almost where they should be, but still require a bit of adjusting.

Sometimes, in an operation such as this, the mouse can be difficult to use. It can seem impossible to get the objects to move just one pixel and suddenly your normally supple

wrist feels like it has a cast on. So, People-Trak provides a “nudge” feature. Nudging allows you to use keystrokes to move an object or a collection of objects one pixel at a time. Here is how it works.

9. Select the **Relation** field and its caption. Now hold down the **CTRL** key and then press the **UP ARROW** key to nudge the objects up. Now press the **DOWN ARROW** key to nudge the objects down. To move left and right, use the **LEFT** and **RIGHT ARROW** keys.

You can use this method to move objects into the precise location you desire without “wrist lock”.

10. Now position the rest of the fields.

11. Close preview mode.

We don't need the captions on any of our fields because the form itself already has the captions on it. All we need to do is clear the captions for all our fields.

12. For each of the **Field** objects, clear the **Caption** field.

13. Click the **Preview** button.

Now the form looks much better.

14. Close preview mode.

All of the moving tasks that you just performed were recorded in the object's property settings. In a future lesson we will take a look at how to see these properties for each object on the custom screen. But before we do that, let's see what our form template looks like as a form document.

15. Continue with the next tutorial.

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## Tutorial 1.3 – Produce a Form Document

Now that we have our form template created, we are ready to produce the output form.

1. On the **Documents** menu, select **Forms**.
2. On the **Tool Bar**, click the **New Form** button to create a new document.

The Forms screen is displayed.

3. In the **Document Name** field, enter **Emergency Contact Form** and place the document in any desired **Explorer Category**. Set the **Category** field to **Personal**.
4. In the **Form Name** field, click the popup button to display a list of the available form templates. Select **Emergency Contact Form**.
5. On the **Tool Bar**, click the **Run Form** button to run this form.

Since a query was not specified, an Emergency Contact Form is generated for each employee, and the form for the first employee is displayed in the Document Viewer. You can move between the records using techniques you have learned before.

6. Close the **Document Viewer** and the **Forms** screen, saving your changes.
7. Close the **Explorer**.

Output forms can also be produced when editing records just like letters and other documents.

8. Open **Donald Stern's** record and remain on the **Personal** screen.
9. On the **Category Bar**, click the **Category Documents** button.

The Documents for Personal Category screen is displayed.

The Select Group is defaulted to Current Record, so all we need to do is select our form.

10. Click on the **Document Type** column header to sort the documents by type. Within the forms that show up, select the **Emergency Contacts Form** we just created.
11. Click the **Run** button to run the form for the current record.

The form will be produced for Donald Stern and displayed in the Document Viewer. We could have just as easily selected Use Group and produced a form for each employee in the group.

12. Close the **Document Viewer**.
13. Close the **Documents for Personal Category** screen.
14. Close **Donald Stern's** record.
15. Continue with the next tutorial.

## Tutorial 1.4 – Create a Form Template 2

You have seen how to create a form template based on a form image. You can also create a form template for reporting purposes. These form templates may or may not use a form image. In our example, we are going to create a form template that includes employee skills.

1. On the **Templates** menu, select Form Templates and create a new form template.
2. In the **Form Name** field, enter **Employee Skills** and select **Training/Competency** for the Category field.
3. Leave the **Paper Size** field set to **Letter**.
4. In the **Margins** field, enter **0.25**, which will create a ¼ margin around the whole form.

Let's start adding objects to our form template. The Border object allows you to create a nice heading and border for your form template. Let's add one to our form template.

5. In the **Object Type** column on the first blank row in the grid, select the popup button to display a list of the valid object types.
6. Select a **Border** for the first object.

The Caption defaults to the name of your form but can be overridden, if you choose.

Now, let's add a frame and fields for the employee information.

7. Add a **Frame** object with a **Caption** of **Employee Information**.
8. Add the **Employee ID** and **Full Name** fields below that.

Next, we will add the skills grid.

9. Add a **Grid** object and use the popup in the Object Name column to select the **Skills Grid**.
10. Click **Preview** to take a look at our form template.

We definitely need to do some rearranging and resizing before using our template in a form. First of all, the Skills grid is too narrow. Let's increase its width to fit within our form borders.

11. Either select **Grid –Skills Grid** in the **Object** dropdown or click on the **Skills** grid to activate it.

Now move the cursor to the right edge of the grid. When the cursor crosses the right edge, it will change to a left/right arrow. With the left/right arrow displayed, hold down the mouse button and carefully drag the right edge of the grid to the right. We do not want to move the grid; we want to make the grid wider.

12. Increase the width of the grid until it fits just within the borders of the form template.

Chances are that the column headers on the grid may need to be resized after our last adjustment.

13. Click in the header area of the **Comment** column of the grid, which will highlight that header. Hover over the column separator line between that column and the **Acquisition Date** column. The cursor will change to a left/right arrow. Click and hold the mouse button down and drag the column to the right until the **Acquisition Date** column has expanded to a size that accommodates the heading text.
14. Reselect the whole grid and move it down the form so that it is placed directly under the frame object that includes the **Employee ID** and **Full Name** fields.

You may have noticed when moving the grid, it stayed within the margins set by the border. Let's take a closer look at this.

15. Select the **Skills** grid for activation. With your mouse, move the grid a bit past the right border of the form template and release it.

Immediately, the Enrollment grid is "snapped" back into the margins set by the form border. Within form templates, there is a snap to edge feature that aligns objects to the left and right margins.

Our last grid modification will be decreasing the number of rows within Object Properties.

16. Select the **Skills** grid and press the **F1** key to display the **Object Properties** screen.

Take a look at the Height field and note the number of rows that our grid has.

17. Change the **Height** to **10** and click **Apply** to apply the change. Click anywhere off the grid to be able to see it again.

Our grid is a smaller size and is exactly how we want it for our form. Let's take a look at how changing the properties of a field object are just as easy as changing grid object properties.

18. Select the **Full Name** field and press the **F1** key to display the **Field Object Properties** screen.

19. Record the value of the **Top** field and close **Field Object Properties**.

20. Use your mouse to drag the **Full Name** field towards the top of the form.

21. Press the **F1** key to display the **Field Object Properties** screen again.

Note that the value of the Top field has been updated to reflect the movement of the object. To restore the field to its original place, simply update the coordinate back to the value you recorded.

22. In the **Top** field, enter the number you recorded. Click the **Apply** button to apply the change. Make any necessary adjustments to move it back into place.

23. Close **Preview** mode and the **Form Templates** screen, saving your changes.

24. On the **Documents** menu, select **Forms**. On the **Tool Bar**, click the **New Form** button to create a new document.

25. In the **Document Name** field, enter **Employee Skills** and place the document in any desired **Explorer Category**. Set the **Category** to **Training/Competency**
26. In the **Form Name** field, click the popup button to display a list of the available form templates. Select the **Employee Skills** template.
27. On the Tool Bar, click the **Run Form** button to run this form.

You can see how easy it is to create and edit a very complex form with any information available in People-Trak.

28. Close the **Forms** screen, without saving your changes.
29. Continue with the next tutorial.

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## Tutorial 1.5 – Create a Form Template 3

Now that we have learned about the many features used to create and edit form templates, we can put our skills to use while building a form template that uses a complex background form with multiple fields that need to be populated.

1. Using what you have learned in prior lessons, create a new form template.
2. In the **Form Name** field, enter **Application for Employment**.
3. In the **Category** field, select the **Personal** category.
4. Leave the **Paper Size** field set to **Letter** and the **Print Form** check box selected.
5. In the **Margins** field, enter **0**.
6. Click the **Select Form** button to display the **Select File** screen.
7. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **APPLICANT INFORMATION 2.PDF**

To save time, we will start you off with the first three field objects that need to be added to the Objects grid.

8. For **Object Type**, select **Field** and select the following **Field Names**:

**Former Employer**  
**Employment Start Date**  
**Employment End Date**

9. Click the **Preview** button.
10. Using what you have learned in prior lessons, move the field objects into their respective places on the form.

As you can see, there are more field objects that need to be added to the Object grid, not to mention all of the moving around and resizing that will need to be done. We have some tedious and time consuming work ahead!

Let us spare you the extra work as we move on to the next tutorial, which will provide an alternative to the drag and drop process.

11. Close preview mode without saving and continue with the next tutorial.

## Tutorial 1.6 – Create a Form Template 4

As we just witnessed, dragging and dropping multiple objects can get a bit out of control. In this lesson, you will see how using a PDF form that has been edited to accommodate People-Trak fields makes creating a form template that much easier.

1. Using what you have learned in prior lessons, create a new form template and name it **New Application for Employment**.
2. In the **Category** field, select the **Personal** category.
3. Leave the **Paper Size** field set to **Letter** and the **Print Form** check box selected.
4. In the **Margins** field, enter **0**.
5. Click the **Select Form** button to display the Select File screen.

In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **APPLICANT INFORMATION 2 EDIT.PDF**

6. Click the **Preview** button and take a look at the form so far.

Does this form look familiar to you? It should. As you can see, the form we used in the last tutorial has been edited in such a way that the Previous Employment fields are now one large blank area. We will use this to our advantage.

7. Close **Preview** mode.
8. Add a **Grid** object and use the popup in the **Field Name** column to select the **Employment History** grid.

The fields in that grid are automatically filled in on the rows below.

9. Click the **Preview** button.
10. If the **Employment History** grid is not already selected, select it for activation and move and position the grid so that it fits within the available blank space of the Previous Employment area.

Voila! We saved a bunch of time by not moving around fields and captions and our form looks pretty good with the grid we added. Now to see what our masterpiece looks like when it is run as a form.

11. Close **Preview** mode, saving your changes.
12. Close the **Form Templates** screen, saving your changes.
13. On the **Documents** menu, select **Forms**.
14. On the **Tool Bar**, click the **New Form** button to create a new document.

The Forms screen is displayed.

15. In the **Document Name** field, enter **New Application** and place the document in any desired **Explorer Category**. Leave the **Category** field set to **User**.

16. In the **Form Name** field, click the popup button to display a list of the available form templates and select the **New Application for Employment** form.
17. On the **Tool Bar**, click the **Run Form** button to run this form.
18. Close the **Forms** screen, without saving your changes.
19. Exit **People-Trak**.
20. This concludes this tutorial and lesson.