Introduction to People-Trak

Version 9.0

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People-Trak is an extensively customizable HR software product. Screen and report samples rendered in this document reflect the default version of People-Trak. These samples may or may not match the screens and reports within your product if customization has been performed.

Contents

Getting Started

User Types

The user type is assigned to a People-Trak user in User Setup and determines what People-Trak desktop and functionality is available to that user.

People-Trak supports the following user types:

- HR - HR User
- Employee - Employee Self-Service User (ESS)
- Manager - Manager Self-Service User (MSS)
- Ex-Employee- Ex Employee Self Service User (Ex-e)
- Applicant –Career Center User (CC)
- Visitor - Visitor User

The HR user type is the only one available in the base People-Trak Essential HR product. The Employee, Manager, and Ex-Employee user types are added when Self Service Employee/ Manager has been implemented. The Applicant and Visitors are added with the implementation of Self Service Recruiting.

Starting People-Trak

People-Trak can be started by selecting the People-Trak icon from your desktop or from the Start menu. The People-Trak Login screen is displayed.

Entering Your User ID/Password

Access to People-Trak is granted using a User ID/Password combination. The User ID and Password is assigned in different ways based on the user type. The HR user type is assigned using User Setup.

To access People-Trak, enter your user ID and password into the respective fields on the People-Trak Login screen. Note that the actual password characters are not displayed. When a correct combination is entered, access is granted to People-Trak and the next screen is displayed. If an incorrect combination is entered, you will receive an error message and you must try again. If you enter your password incorrectly three times, People-Trak closes and you will have to start over by reopening People-Trak. If you forget your password, you have the option of clicking the "Forgot your password" link. You will be asked your forgotten password question and you must give the correct answer to have your password emailed to you. You define that question and answer in User Setup on the Login tab.

Based on settings in Enterprise Setup, you will be periodically required to change your password. The Change Password screen will display when it is time for you to change your password:

You would then enter the required information and click Submit to change your password. If you do not submit a change, you will have a number of grace logins (set in Enterprise Setup) before you are shut out of People-Trak completely. If that happens, you must contact the HR Administrator to get your login reactivated.

People-Trak Organizer Desktop

When access has been granted to People-Trak, the People-Trak Organizer desktop is displayed. The People-Trak Organizer desktop is highly customizable by company and by user. This desktop is only available to HR users and is the default desktop within Essential HR. From this desktop, it is possible to switch between modules and run processes in a variety of ways. The Tasks pane allows the user to quickly access frequently-used tasks. The People-Trak News pane includes links to the latest information provided by People-Trak.

Modules

A module is a self-contained component of a software program. People-Trak has up to twelve different modules that make up its HR Information System. They are:

- Personnel Management
- Safety Management
- COBRA Administration
- Benefit Administration
- Training Course (optional)
- Training Administration (optional)
- Position Control (optional)
- Requisition Tracking (optional)
- Applicant Management (optional)
- Contact Management
- Generic Module (optional)
- Document Management (optional)

The Position Control, Requisition Tracking and Applicant Management modules are added as part of the Position Control option. The Training Course and Training Administration modules are added as a part of the Training Administration option. The Generic and Document Management modules are added as part of the Strategic Toolkit option.

Selecting a Module

In the Organizer desktop, you can easily select a module by clicking on the appropriate module name in the Modules pane. You can only select a module to which you have been given access, which is controlled in the Security Setup process. When you select a module, the following changes take place:

- The Main Menu Bar includes the options for the selected module.
- The Shortcut Bar includes options for the selected module.

Workflows

A workflow is a collection of one or more screens. People-Trak includes a standard workflow for each module that is used to collect the information required. The name of the standard workflow for a module is "Standard - " followed by the record maintained by the module. For example, the Personnel Management module maintains the Employee record, so the standard workflow is "Standard - Employee".

When you create a new record or open an existing one, the default workflow for that module is opened. The workflow screen replaces the processing area of the desktop.

You can change the standard workflow for a module per user using User Setup. You can remove screens and change the order of the screens in the standard workflow.

Working with Records

In the Organizer desktop, once you have selected a module, you can work with the records associated with that module, based on your access as determined in Security Setup. For example, if you have selected the Personnel Management module, you can then create, open, delete, transfer or copy an employee record. If you have selected Safety Management, you can create, open, delete, transfer or copy an incident record.

Working with Companies

People-Trak is a multi-company product. By default, the product comes with two pre-defined companies: ACTIVE and ARCHIVE. You can use these two companies in any way that you wish, but they are actually designed to contain your active company information and your archived company information. You can create and utilize other companies as well.

Regardless of how many companies you actually have, the operating conventions for working with these companies remain the same. These are described below.

Changing the Default Company

Each user is assigned a "default" company. This is the company you are attached to when you first log in. The Default Company is initially set with the User Setup process when the user is created. You can change the default company at any time to any other company to which you have access.

Note: If you are assigned to a default company and are then denied access to that company at a later time, you cannot attach to that company at login.

Controlling Access to Companies

Access to the standard two companies or to any of the companies that have been defined is controlled with the Security Setup option on the Setup menu.

Identifying the Current Company

You can identify the company to which you are currently attached by looking at the company name in the header of the desktop, if the company header is being used.

Logging Off

In the Organizer desktop, you can simply click the Logoff shortcut or select the Logoff option on the File menu. Either way, you will be logged off as the current user and the People-Trak Login screen will appear. You then have the option of entering a User ID/Password to log back into People-Trak or clicking Cancel to exit People-Trak.

Organizer Desktop

The Organizer desktop allows the user to switch between modules and run processes in a variety of ways. The Organizer desktop is only available to HR users. The following is a sample of an Organizer desktop with its components labeled.

People-Trak Bar →

Header
Desktop Bar →

Main Menu Bar →
People-Trak News Pane →

Shortcut Bar →

Modules Pane →

Categories Pane →

Tasks Pane →

Status Bar →
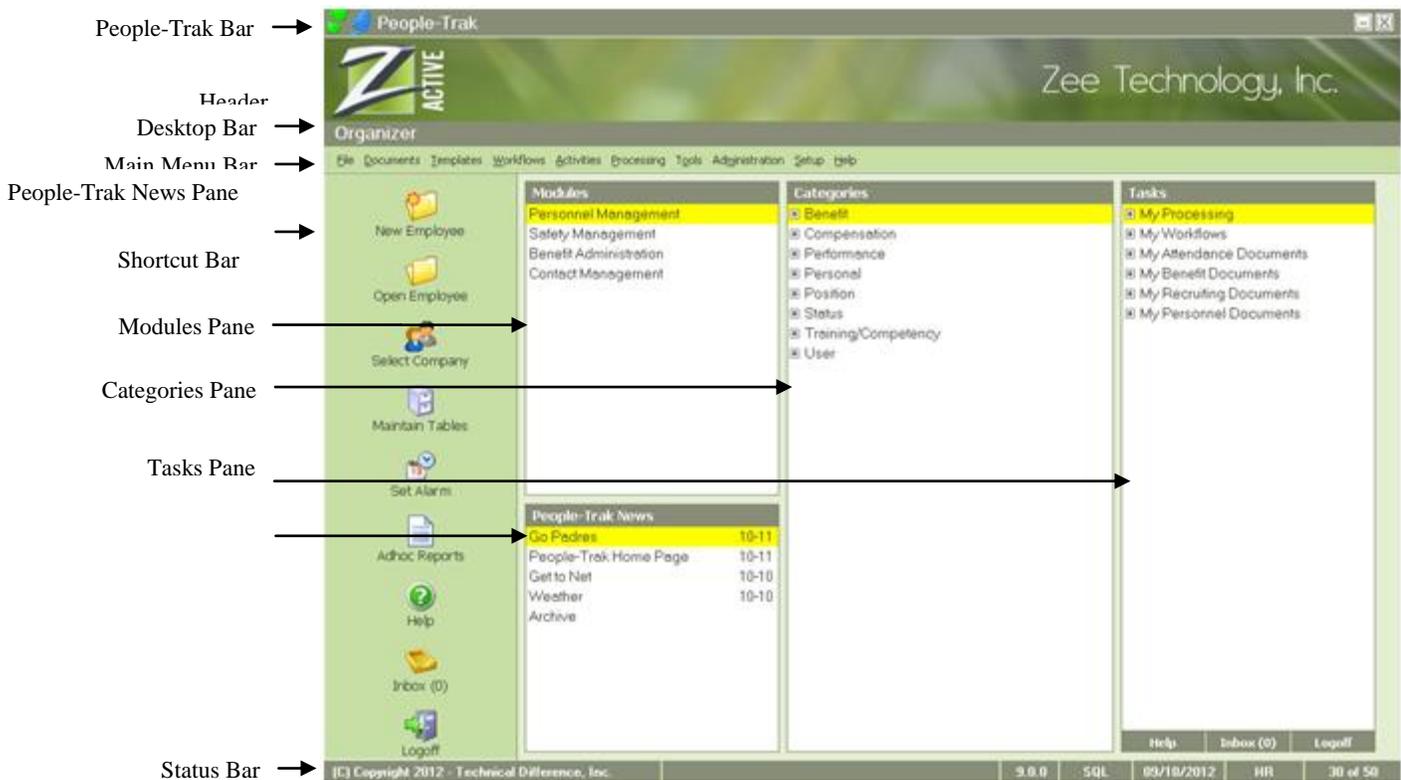
The following sections describe each component of the Organizer desktop.

People-Trak Bar

The People-Trak Bar is displayed at the very top of the Organizer desktop. It contains the People-Trak name on the left, and Minimize and Close buttons on the right.

Header

The Header is located below the People-Trak Bar. This area will include either the enterprise or company name and image as specified in Desktop Setup.

Desktop Bar

The Desktop Bar is located below the Header. It includes the name of the current desktop.

Main Menu Bar

The Main Menu Bar is displayed below the Desktop Bar. It contains a phrase for each of the People-Trak menus. When the mouse is clicked on one of these phrases, the corresponding menu is displayed. Each of the menus listed on the Main Menu Bar is described in detail below.

File Menu

The File menu contains options for creating, changing, and deleting records (employees, applicants, COBRA recipients, etc.) and performing other tasks related to records stored within the current module.

When you see the *Record* placeholder in the descriptions below, this refers to the primary item being tracked by the module. On the actual menus, the *Record* placeholder will be replaced with the appropriate name. For example, for employee records tracked in the Personnel Management module, the menu phrases will be "New Employee", "Open Employee", etc. A similar, appropriate phrase applies to each module.

- New *Record*
- Open *Record*
- Select Company
- Logoff *User*

Documents Menu

The Documents menu contains a list of document types.

When you select a document type option, the Explorer is displayed for that type. You can then create, update or run documents.

Templates Menu

The Templates menu contains a list of template types.

When you select a template type option, the appropriate template screen is displayed. You can then create, update or edit templates.

Workflows Menu

If you have workflows defined for the current module that are to be shown on the menu, the Workflows menu is displayed on the Main Menu Bar. The Workflows menu contains workflows that have the Show on Menu check box selected.

Activities Menu

The Activities menu is displayed on the Main Menu Bar and contains the activities available in the current module.

All modules have a standard Manager activity for their respective records. For example, in the Personnel Management module, there is an Employee Manager activity, in the Safety Management module, there is an Incident Manager, and so on. These activities allow you to update records in a module using a more process-oriented approach. These activities also provide non-HR users (such as managers when Self Service Employee/Manager is implemented) a more user-friendly interface for updating records. In Module Setup, you define the lookup and result fields to use for the record Manager activity as well as specify the default source for create.

Processing Menu

If Processing options exist for the current module, the Processing menu is displayed on the Main Menu Bar and contains those options.

Tools Menu

The Tools menu in the base People-Trak Essential HR product contains options for maintaining tables, changing passwords, setting alarms, as well as using productivity tools such as the alert triggers, schedule triggers, and the inbox. Menu options are lsited below:

- Inbox
- Maintain Tables
- Set Alarm
- Change Password
- Alert Triggers
- Schedule Triggers

Note: Only users with Administrator access (Administrator check box selected in Security Setup) have access to the complete Tools menu. Non-Administrator users only have access to the Inbox, Maintain Tables, Set Alarm and Change Password options on the Tools menu.

Administration Menu

This menu contains options for performing a wide variety of administration tasks. Menu options are lsited below:

- Screen/Field Customization
- System Templates
- Email Attachments
- Email Definitions
- Audit Reports
- Audit/Transaction History
- Database Manager
- Import
- Backup
- Restore
- Utilities

Note: Only users with Administrator access (Administrator check box selected in Security Setup) have access to the Administration menu. Non-Administrator users do not have this menu on the Main Menu Bar.

Setup Menu

This menu contains options for performing setup tasks. Menu options are lsited below:

- Enterprise Setup
- Desktop Setup
- Company Setup
- Module Setup
- User Setup
- Security Setup
- Security Setup - Module
- Table Setup
- Audit Setup

Note: Only users with Administrator access (Administrator check box selected in Security Setup) have access to the Setup menu. Non-Administrator users do not have this menu on the Main Menu Bar.

Help Menu

This menu contains options for the Help features within People-Trak. Menu options are lsited below:

- Help Topics
- Support Online
- Help About

Shortcut Bar

The first column on the left-hand side of the Organizer desktop, called the Shortcut Bar, provides shortcut icons, much like Microsoft Outlook. These icons are used to more easily access important features of People-Trak without having to open the File menu.

Modules Pane

The Modules pane includes the list of the People-Trak modules that have been activated in Desktop Setup and to which you have been given access in Security Setup. To select a module, simply click on the module name.

Categories Pane

The Categories pane includes a list of categories that have been defined for the current module. The treeview hierarchy allows you to drill down into Activities, Processing, Documents, Tables and Workflows that exist within each category. In their respective processes, you can assign Documents and Workflows to an existing Category, which will then cause them to show up in this Categories pane under that category.

To open up a category, click the + sign to the left of the category. The + sign will turn to a – sign for that category, signifying that the category is now open. The subcategories (Activities, Processing, etc.) that have items in them will now be shown. As with the main category, click the + sign to open that category. The + sign will turn into a – sign for that subcategory, signifying that the subcategory is now open. The items in that subcategory will now be shown. To select an item, click on it. To close a category or subcategory, click the – sign to the left of that category/subcategory.

Tasks Pane

The Tasks pane includes a listing of frequently-used tasks that have been specified for the user within the Desktop Tasks screen found on the Preferences tab in User Setup. To select a task, click on it. The module will automatically switch based on the task selected, and the task will be executed. When the task is completed, you will be returned to the module you were in when you selected the task. The Tasks pane is a convenient way of accessing tasks that you use often. You have the option of grouping these tasks so you can open and close groups like you do for categories in the Categories pane. If you would like to see the extended descriptions for the task, hover over the task and a tool tip with the description will be displayed. The Tasks pane also includes a bar at the bottom with links to three standard activities: Help, Inbox and Logoff.

People-Trak News Pane

The People-Trak News pane includes links to the latest information provided by People-Trak. The links in this area will be updated nightly when running the NightRun process. You can view video tips, customer notifications and other important information to keep you up-to-date. There will be up to ten links as well as an Archive link, which accesses an index of past news items.

Status Bar

The Status Bar is displayed at the very bottom of the Organizer desktop. It contains panels for messages, a progress monitor, the People-Trak version, the database type, the system date, the user type and the record counter. The messages and progress monitor panels are blank until there is a message or processing in progress. The following example shows just the last five panels.

9.0.0	SQL	02/02/2012	HR	30 of 50

Note: In order to alert you, the numbers for the Record Counter will change colors as the number of records used approaches the number of records licensed. You will need to contact your Support Representative to license more records as needed.

The Workflow Area is the area of the desktop that is used to process workflows. All desktops utilize the area below the Header and above the Status Bar for workflow processing.

A sample desktop with the Standard - Employee workflow open for processing is shown below.

Notes

Workflow Area

Title Bar

The Title Bar is at the top of the Workflow Area and includes the name of the workflow that is currently being processed. The X on the right-hand side of the bar can be used to close the workflow (as can the Close *Record* option).

Menu Bar

The Menu Bar is below the Title Bar and above the Tool Bar. It includes the menus described below.

File Menu

The File menu contains several options for dealing with records as well as for printing the screen, viewing documents, sending email and editing the lookup.

When you see the *Record* placeholder in the descriptions below, this refers to the primary item being tracked by the module. On the actual menus, the *Record* placeholder will be replaced with the appropriate name. For example, for employee records tracked in the Personnel Management module, the menu phrases will be "New Employee", "Open Employee", "Delete Employee", etc. A similar, appropriate phrase applies to each module.

- New Record
- Open *Record*
- Save *Record*
- Close *Record*
- Delete *Record*
- Copy *Record*
- Transfer *Record*
- Print Screen
- Record Status
- Send Email
- Edit Lookup
- Exit

Edit Menu

The Edit menu contains several options used for editing fields.

The options on the Edit menu, as well as the corresponding buttons on the Tool Bar, turn on and off as the appropriate features are enabled.

- Undo
- Undo All
- Cut
- Copy
- Paste
- Delete Text
- Date Stamp

- Set Date Stamp
- Select All
- Insert Row
- Delete Row
- Row Up
- Row Down

Audit Menu

The Audit menu contains several options used for viewing edit history, field audit history, as well as audit and transaction history.

- Edit History
- Field Audit History
- Audit History
- Transaction History

Help Menu

This menu contains options for the Help features within People-Trak. Menu options are lsited below:

- Help Topics
- Support Online
- Help About

Tool Bar

The Tool Bar is displayed between the Menu Bar and the Navigation and Category Bars. It contains buttons to do file, edit and help functions.

Buttons will be disabled when they are not applicable. For example, the four grid buttons above are disabled because the current field is not in a grid. The Tool Bar above is from a primary screen. A sub screen would not have the New, Open or Close buttons on its Tool Bar since those are only applicable on a primary screen. Toolbar buttons are lsited below:

Note: Each People-Trak process also has a Tool Bar. The buttons are similar to those described below. Some buttons may not be available depending on the process. For example, the User Setup process has a Tool Bar identical to the one above, except the Open button is not applicable because a list box is used to select users to update.

When you see the *Record* placeholder in the descriptions below, this refers to the primary item being tracked by the module. On the tooltips, the *Record* placeholder will be replaced with the appropriate name. For example, for employee records tracked in a personnel module the tooltip phrases will be "New Employee", "Open Employee", "Delete Employee", etc. A similar, appropriate phrase applies to each module.

- New *Record*
- Open *Record*
- Save *Record*
- Close *Record*
- Print Screen
- Cut
- Copy
- Paste

- Date Stamp
- Undo Current Field
- Insert Row
- Delete Row
- Row Up
- Row Down
- Show Field Help
- Show Screen Help

Navigation Bar

The Navigation Bar is displayed after the Tool Bar and before the main body of the screen. The Navigation Bar contains features used to navigate among the records that have been selected for editing.

Record Dropdown

Performs three functions. It displays the group of records established at lookup. It also displays the currently selected record. Lastly, it allows you to select from any of the records in the group. The group is initially filled using the Lookup option and can be modified using the Edit Lookup feature on the File menu.

First Record

Selects the first record in the group of records listed in the Record dropdown.

Previous Record

Selects the previous record in the group of records listed in the Record dropdown. If the first record is the current record, the last record becomes the current record.

Record Counter

Indicates the position of the current record relative to the group of records listed in the Record dropdown. For example, the phrase "4 of 30" indicates that the fourth record in a group of 30 is currently displayed. This message is updated whenever the current record is changed using the Record dropdown itself or when any of the First, Previous, Next, or Last buttons are used.

Next Record

Selects the next record in the group of records listed in the Record dropdown. If the last record is the current record, the first record becomes the current record.

Last Record

Selects the last record in the group of records listed in the Record dropdown.

Category Bar

The Category Bar is displayed after the Tool Bar and before the main body of the screen. The Category Bar is used to navigate among screens and category buttons available in the current module. The Screens dropdown performs three functions. It contains a list of the screens that you can access. It also displays the current screen name. Additionally, it allows you to select from any of the screens you can access. The list of screens in the dropdown is determined by the screens and categories to which you have been given access in Security Setup - Module.

If you do not have access to a screen, it will not be listed in your Screen dropdown.

Previous

Selects the previous screen in the dropdown. If the first screen is the current screen, the last screen becomes the current screen and is displayed. The keyboard equivalent for the previous screen function is the PAGE UP key.

Next

Selects the next screen in the dropdown. If the last screen is the current screen, the first screen becomes the current screen and is displayed. The keyboard equivalent for the next screen function is the PAGE DOWN key.

Category Documents

Allows you to select the document and record type (Current Record, Current Group or Use Query) for which you want the document to run. Only documents assigned to the current category will be available.

Category Tables

Allows you to view and edit tables that have been assigned to the current category. Tables that are non editable are viewable as display only.

Category Notes

Allows you to view all notes that have been assigned to the current category. This button is only available if the Notes check box is selected for the user in Security Setup.

Category Help

Allows you to view help for all screens, tables, documents, templates, derived fields, processing and workflows that have been assigned to the current category.

Primary Screen Area

The actual body of the Workflow Area is the Primary Screen Area. Each workflow can have one or more primary screens, which can be selected using the Screen dropdown. The following is a sample of the Personal screen in the Standard-Employee workflow of the Personnel Management module

Each primary screen can have sub screens, which are accessible via buttons. In the screen above, the Emergency through ID buttons on the right give you access to those sub screens when you click them. You can expect to see a very standard interface no matter what module you are currently in.

Operating Conventions

Data Validation

People-Trak uses two types of data validation: entry and post-entry.

Entry Validation

Entry validation occurs during the actual keying or "entry" of the field and is designed to prevent invalid characters from being entered into a field. Entry validation is limited to date fields, numeric fields, and time fields. If you are positioned to a date field and press an invalid character, the character will be ignored because the field knows what characters are valid. If you are positioned to a numeric field or a time field, the same is true. The field will limit characters to those that are valid.

Post-Entry Validation

People-Trak also uses "post-entry" validation. This occurs when you press the ENTER key or the TAB key to move the cursor to another field or when you use another key to change the cursor location. It also occurs when you use the mouse to move the cursor. During post-entry validation, the contents of the field are compared against pre-defined attributes of the field. If the data entered does not match the attributes of the field, the entry is rejected and the cursor remains at the field you had just requested to leave.

Post-entry validation is required because not all attributes of a field can be checked during entry and because of the cut, copy, and paste features. With the cut, copy, and paste features, you can take the contents of one field and move them to another. The data that has been moved is not validated until you attempt to leave the field. If you have pasted character data into a numeric field, you will not be able to leave the field until you have corrected or erased the entry.

Required Fields

Default Required Fields

By default, there is a single required field in each module. That field is the unique ID (employee ID, applicant ID, etc.) that identifies the record within the company. You cannot save a record without having specified a unique ID. If you attempt to save a new record without an ID, you will receive a message and you will not be able to save the record. If you attempt to change an existing ID to one that is in use elsewhere within the company, you will receive a message and the ID you have specified will be rejected.

If you have chosen to use the Auto-Numbering feature, the IDs that are generated will always be unique because they are checked before they are assigned.

User Defined Required Fields

People-Trak also allows you to make any field a required field. This is a very powerful feature that works as follows. If you position to a required field, you cannot leave that field unless you have specified a non-blank value. If you position to the field inadvertently and really do not wish to specify a value, you will not be able to leave the field until you provide some type of entry. In some instances, the only way you will be able to continue processing is to enter a temporary value.

If you have a required field on a screen and do not enter a value in that field, you will not be able to leave the screen (by any means) until a value is entered. Even if you do not position directly to that field, you will not be able to continue processing until that field is given a non-blank value. If you have a dozen required fields on a screen, you will not be able to leave the screen until a non-blank value has been specified for each and every field.

Note: This feature is a very attractive feature, but it is very powerful. If you really do not intend for a feature to be entirely required, do not use this feature or it will be very, very frustrating.

Formatting

People-Trak uses three types of data formatting: pre-entry, entry and post-entry. Some fields have their format based on the PC's regional settings or the company settings.

Pre-Entry Formatting

People-Trak stores all data in the database in a non-formatted way. Pre-entry formatting refers to the formatting that occurs when the data is moved from the database into the field. Dates, times, numeric values, telephone numbers and social security numbers are all translated from their raw storage format into the formats you have specified in the PC's regional settings or in your company settings.

Entry Formatting

Entry formatting refers to the formatting that occurs when a field is entered. This type of formatting is limited to date fields, which are difficult to key because of the date separator. If you have selected Auto-Delimit in User Setup, the separator (determined by the PC's regional date format setting) is automatically inserted for you when dates are keyed. So, you can simply key the numbers and assume that the field will be formatted correctly.

Post-Entry Formatting

Post-entry formatting refers to the formatting that occurs when a field has been completed. Numeric fields, telephone numbers, and social security numbers are all formatted after they have been entered, even if they have been keyed with separators, commas, or decimals. The same is true for dates if you have not selected Auto-Delimit in User Setup; in that case, the date is formatted to the PC's regional 10-character date format after entry. Other types of formatting are also performed post-entry.

People-Trak supports three types of case formatting on alpha-numeric fields: none, proper case, and upper case. If you have specified the proper case format for the City field, the field will be proper cased when you leave the field. For example, if you enter any of the following: san diego, SAN DIEGO, sAN DIEgo, the field will be switched to San Diego. Likewise, if you specified the upper case format for the City field and you enter any of the following: san diego, San Diego, SAN Diego, the field will be switched to SAN DIEGO when you leave the field.

Cut, Copy, and Paste

People-Trak uses standard Windows cut, copy, and paste conventions at all data entry fields.

Cut

The cut feature is used to cut the highlighted contents of a field. Cut removes the highlighted contents and stores the contents in the paste buffer. Cut text can be pasted into any other applicable field using the Paste option on the Edit menu, the Paste button on the Tool Bar, or

the CTRL + INS or CTRL + V key sequence. The Cut feature is available on the Edit menu, as a button on the Tool Bar, and as the CTRL + X key sequence.

Copy

The copy feature is used to copy the highlighted contents of a field into the paste buffer. Text in the paste buffer can be pasted into any other applicable field using the Paste option on the Edit menu, the Paste button on the Tool Bar, or the CTRL + INS or CTRL + V key sequence. The Copy option is available on the Edit menu, as a button on the Tool Bar, and as the CTRL + INS or CTRL + C key sequence.

Paste

The paste feature is used to paste the contents of the paste buffer into any applicable field. The paste buffer is a Windows feature and can contain text that has been pasted from another product. For example, if you copy the text of an email message in some unrelated task, that text is placed into the same paste buffer that is available within People-Trak. The paste buffer is not emptied after a paste action, but can be used over and over again. In fact, the paste buffer remains until another item has been cut or copied into the paste buffer or until Windows is shut down. The Paste option is available on the Edit menu, as a button on the Tool Bar, and as the SHIFT + INS or CTRL + V key sequence.

Note: The paste feature allows you to paste invalid data into fields that have special formatting attributes. For example, if you cut or copy an employee last name into the paste buffer, you will be able to paste it into both date fields and numeric fields. These types of fields do not allow character style data and would normally disallow data entry of such characters. When you attempt to leave a field that contains invalid data, the post-entry validation feature will prevent you from leaving the field until you have corrected it.

Date Stamp

People-Trak provides a special capability at date fields that allows the rapid insertion of the current setting of the date stamp. The date stamp capability simulates the mechanical date stamp that has been used for many years to stamp documents and mail. The date stamp is a special paste buffer. It is filled with the current date when an editing session begins, but can be modified at any time using the Set Date Stamp option on the Edit menu. When the cursor is positioned to a date field, use the Date Stamp to instantly insert a date into the field.

On certain screens that have a wide variety of date fields, the Date Stamp feature may not be useful. However, with Batch Processing processes where you will need to enter the same date many times, this feature can save a great deal of time. The Date Stamp feature is available on the Edit menu, as a button on the Tool Bar, and as the F4 key.

Exiting a Record or Screen

In a record or in any screen with the Save capability, the record/screen can be exited in one of two ways: using the Exit option on the File menu or clicking the "X" in the upper right-hand corner of the Workflow Area or screen. The Exit option automatically saves any changes and exits the screen. Clicking the "X" asks you if you want to save when changes are made, saves or doesn't save according to your answer and then exits the screen. On a screen without the Save capability, the Exit and "X" both just exit the screen because no save is involved.

Note: When editing a record and exiting a sub screen, you are saving changes to the sub screen only. Changes to the record are only saved when saving the record itself. In addition, if you have accessed the same sub screen multiple times before saving the record, clicking "X"

and saying "No" to the save question only discards the current editing session's changes to that sub screen not all changes to the sub screen.

Enable Preselect

People-Trak adheres to an operating convention that differs from the standard Windows convention. When the cursor is first positioned to a field, Windows normally pre-selects the entire entry. If you press any key, the current entry is wiped out and is replaced with whatever you type. In the People-Trak standard, the field is not pre-selected.

If you prefer to use the Windows standard for entry selection, you can change the setting of the Enable Preselect check box on the Preferences tab of User Setup. When the check box is selected, the Windows standard applies, and an entry will be pre-selected. When the check box is not selected, the People-Trak standard applies, and an entry will not be pre-selected. This check box is not selected by default.

Change the Enable Preselect Setting

The Enable Preselect setting can be switched at any time. The System Administrator can switch modes for any user using the User Setup option on the Setup menu.

Color Conventions

People-Trak provides user definable colors for four data edit characteristics: normal data, modified data, field mask and pending data.

Normal Color

The normal color is the color in which data is displayed when no change has been made to the field. The default color for normal data is blue.

Modified Color

The modified data color is the color in which data is displayed after a change has been made to that field, but before it has been saved. The default color for modified data is red.

Mask Color

The field mask is that area that surrounds a field when the cursor is positioned to that field. The field mask is visible on both text boxes and grids. The default color for the field mask is yellow.

Note: The mask color is also used as the highlight color on most drop-downs and list boxes.

Pending Color

The pending color is the color in which data is displayed after a change has been made to the field and saved, but before the change has been approved and posted. The default color for pending data is magenta.

Note: If Self Service options are implemented, a pending color is used.

Changing Color Preferences

The four data colors can be modified for any color scheme at any time. An Administrator can modify the color preferences for any scheme using the Define Colors button within User Setup, the Set Colors button in Desktop Setup, or the Maintain Color Schemes utility.

The changes take effect immediately. You can confirm this by using the updated color scheme (assign that scheme to your user in User Setup) and then using any editing screen.

Caution: It is possible to select a combination of colors that will cause data to disappear. For example, if you select a dark blue mask with dark blue unmodified data, the data will not be visible when the field is highlighted.

Note: The frame, background and font colors in a color scheme can also be changed using this procedure. New color schemes can also be created and then assigned using User Setup.

Using the Undo Feature

When Changes are Saved

People-Trak saves data when you close the record, exit the record, change records, click the save icon, or use the Close button in the upper right hand of the screen and choose to save. If you decide to abandon changes in process on a given screen, you may do so by using the Close button and choosing not to save.

The Edit History Log

People-Trak maintains an ongoing edit history while you are editing and before changes are saved. Every change is recorded as it is actually made. You can view the log at any time using the Edit History option from the Audit menu.

Undo

The Undo feature can be used to undo data entry that has been performed on any field. The feature is very powerful in that you can selectively undo any change that has not yet been saved to the database. Fields that have been changed are displayed in the modified color rather than the normal color. When you position the cursor to any modified field, the Undo button on the Tool Bar will be activated as will the Undo option on the Edit menu. If you click the button or select the option, the prior value of the field will be restored.

The Undo feature uses the Edit History Log. Thus, it is possible to have multiple changes to the same field that can be undone. After using the Undo feature to undo the latest change, the Edit History Log is checked to determine if there any other changes to the same field for the current record. If there are, the field remains in the modified color and the Undo button and option remain active. When the last change has been undone, the color is returned to the normal color and the button and option are deactivated.

Note: The Undo feature undoes changes made to individual fields during an editing session. It does not undo changes made in bulk using batch processing, import, table mass update, or database manager. It is highly recommended that you perform a quick backup prior to performing any type of bulk change.

Undo All

If multiple changes have been made during the current edit session on one or more screens, including row deletes, you can undo all of those changes at one time using this option. The Undo All feature uses the Edit History Log to sequentially back out all of the changes that have been recorded in the log. However, any actions taken by triggers cannot be undone. In addition, a change to the record ID field cannot be undone because that information is written to the database upon leaving the field.

Note: When using any undo features, only changes made since the last save can be undone.

Working with Grids

As described in the vocabulary sections, grids are a special class of data entry component. A sample grid is shown below.

Grids are used to display rows and columns of information. The rows often represent multiple occurrences of historical data. For example, a grid can be used to store salary history. There are columns for the salary date, hours per week, salary rate, annualized pay, etc., that are repeated as rows for each salary history. With a few exceptions, a grid can contain as many rows as you can enter.

Capacity

As mentioned above, most of the grids in People-Trak can contain as many rows as you choose to enter. However, to manage the scroll bar properly and to maximize speed, only 50 rows can be entered at one time. When you first display a screen that utilizes a grid, the grid is populated with 50 blank rows. If you enter 20 rows and leave the screen, but then return, you will have room for the original 20 rows plus 50 additional rows. Each time you return to the grid, you will have the number of existing rows plus 50. If you need to enter more than 50 rows into a grid at one time, you can click Save and 50 more blank rows will be added to the grid.

Navigation

Once the cursor has been positioned within a grid, the following navigation keys apply.

- TAB or ENTER
- SHIFT + TAB
- DOWN ARROW
- UP ARROW
- Scroll Bar
- Mouse Clicks

TAB or ENTER moves to the next field in the current row. If the cursor is at the last field in the current row, the cursor moves to the first field on the next row.

SHIFT + TAB moves to the prior field in the current row. If the cursor is at the first field in the current row, the cursor moves to the last field on the prior row.

DOWN ARROW moves the cursor to the next row within the same column.

UP ARROW moves the cursor to the prior row within the same column.

Scroll Bar scrolls the visible portion of the grid, but does not move the actual cursor. For example, if the cursor is on the first row and you scroll the first row out of view, the cursor remains on the first row. If you scroll the first back into view, the cursor will be present where you left it.

Mouse Clicks can be used to position the cursor to any editable cell. If you are positioning to a cell that contains data, the first click will position to the cell and the second click (within the same cell) will position the cursor within the data itself.

Editing

A grid actually acts like a report upon which a movable text box is positioned. When the text box is positioned over a cell (row and column location), the contents of the cell are put into the text box. If you modify the text box, the change is moved back into the cell when you leave the cell. Because the movable text box works precisely like the stand-alone text boxes used elsewhere, the operating conventions are identical. All keystrokes, undo features, tables, and other popup features work the same.

Similarly, a check box is positioned over cells that utilize the check box attribute. Once the cursor is positioned to the cell, the check box component takes on the current attribute of the cell (checked or unchecked). If you toggle the check box and then move on, the cell takes on the new status of the check box.

When working with grids, the mask color feature is tremendously helpful. Both the text box cells and the check box cells are more easily identified as having the focus when they are highlighted with a light color such as yellow.

Inserting and Deleting Rows

Because grids contain rows of information, you can insert and delete rows whenever you choose. A blank row can be inserted at any location using the Insert Row feature. This feature is activated with the Insert Row button on the Tool Bar, the Insert Row option on the Edit menu or Function Key 9. Once the blank row has been inserted, you can complete the columns in the row by adding the appropriate information.

A blank row or previously completed row can be deleted at any time using the Delete Row feature. This feature is activated with the Delete Row button on the Tool Bar, the Delete Row option on the Edit menu or Function Key 8. Deleting a row discards a number of fields at once and should be used with some caution. It is not possible to use the standard Undo feature to undo the fields that have been deleted. However, if multiple changes have been made during the current edit session, including row deletes, you can undo all of those changes at one time using the Undo All option. The Undo All feature uses the Edit History Log to sequentially back out all of the changes that have been recorded in the log.

Note: When using any undo features, only changes made since the last save can be undone.

Field Types

People-Trak uses the set of standard field types listed below. The operating conventions and formatting attributes for these fields are consistent throughout People-Trak.

- Color
- Currency
- Date
- File
- Font
- Memo

- Numeric
- Object
- Path
- Text
- Time
- Yes/No

Color

Color fields are used to capture the color attribute for some particular feature. Color fields do not store actual color names, but reflect the color actually selected. To change the color, use the color popup to select the new color with the mouse.

Currency

Currency fields are used to store positive or negative numbers with or without decimal places. Two values determine the actual format of a currency field: the length of the field and the number of decimal places.

###.##   Length = 6, decimal places = 2
Length = 6, decimal places = 0

| ######.## | Length = 9, decimal places = 2 |
| #####.#### | Length = 10, decimal places = 4 |

The field length and decimal places for currency fields are user defined and can be modified with the Field Customization feature. Thus, if the default ##########.## format of the Pay Rate field is not acceptable to you, you can change it to any reasonable length with up to four decimal places.

Currency fields differ from numeric fields in that when a document is run, a currency symbol appears next to the currency field, but not next to the numeric field. The currency symbol is defined in Company Setup.

Date

Date fields are also widely used in People-Trak. Date fields are the only fields that have the option of using "real-time" formatting. This means that the field is formatted as you enter it. People-Trak is shipped with the Auto-Delimit feature turned on in User Setup. Auto Delimit is a check box that allows you to specify whether or not you want date delimiters automatically entered for you when entering a date. If this check box is selected, only numbers can be entered in a date field and the delimiter specified in the PC's regional date format setting is automatically entered in the correct positions. If this check box is not selected, numbers and a delimiter of ".", "/" or "-" can be entered in a date field, and the field is formatted to the PC's regional 10-character date format after it is entered. For example, if you type in "3.4.9" and press ENTER, the date will be formatted to 03-04-2009 if the PC's date format is m-d-yyyy, mm-dd-yyyy or some variation of that.

Date fields are also supported by the date popup. It uses a calendar to allow you to pick a date using a series of mouse clicks for the month, day, and year. Some date fields are also supported by the date variables popup, which allows you to select from a list of date variables.

File

File fields store the full file name of a file. File fields work just like a text field in that any value can be keyed. However, when a file is entered, it is validated to determine if it actually exists. You cannot record a file that does exist or cannot be validated. File fields are supported by the file popup.

Font

A font field is actually composed of three different fields: font name, font style, and font size. When a font is specified for a particular feature it requires all three entries to define the font. To change or set a font, use the font popup to select the three desired attributes.

Memo

Memo fields are text fields that can be over 255 characters. Regular text fields have a maximum of 255 characters. In a memo field, you can enter the text in the field itself or use the multi-line editor popup to enter more than a single line of text. The maximum size of a memo field is 2 GB of data.

Numeric

Numeric fields are used to store positive or negative numbers with or without decimal places. Two values determine the actual format of a numeric field: the length of the field and the number of decimals.

###.##	Length = 6, decimal places = 2
######	Length = 6, decimal places = 0
######.##	Length = 9, decimal places = 2
#####.####	Length = 10, decimal places = 4

The field length and decimal places for most numeric fields are user defined and can be modified with the Field Customization feature. Thus, if the default ####.## format of the Standard Hours field is not acceptable to you, you can change it to any reasonable length with up to four decimal places.

The numeric separator and decimal symbol can be based on the PC's regional settings or the company's settings. For documents, the company's settings are always used for numeric fields. In Company Setup these fields are currently inactive and set to display only.

Object

Object fields are used to store images. An example is the Employee Photo ID field.

Path

Path fields store a directory path. Path fields work just like a text field in that any value can be keyed. However, when a path is entered, it is validated to determine if it actually exists. You cannot record a path that does exist or cannot be validated. Path fields are supported by the path popup.

Text

Text fields are the most common type of field. They vary in length from one character to 255 characters and can contain almost any printable character on the keyboard. In a text field, you can enter the text in the field itself or use the multi-line editor popup (if available) to enter more than a single line of text.

Many text fields are supported by tables. Tables are user-defined lists from which values can be selected. When a field is supported by a table, the table popup button will be displayed adjacent to the field itself.

There are a number of attributes that can be assigned to text fields. These attributes determine how the contents of the field are displayed when the field is first retrieved from the database and immediately after a change has been made.

- Email
- Hyperlink
- None
- Proper Case
- Social Security
- Telephone
- Upper Case

Email causes the contents of the field to be validated for relevance as an email address. This also enables the Email popup to be displayed.

For a Hyperlink, no formatting is done on the field, but this setting sets the Popup Type to Hyperlink, which makes this field a hyperlink to whatever website, ftp site or file is in the field.

None causes the field to remain as keyed. No action is taken on the field.

Proper Case causes the contents of the field to be formatted according to standard proper case rules. Except for certain ethnic conventions (such as those used for Irish and Scottish names), this normally means that the first character of each word is set in upper case with the remainder of the name in lower case. Other phrases, particularly those used in an address such as RR, PO, etc., follow normal case conventions.

Social Security causes the contents of the field to be formatted in one of the following ways. The actual format that you use is defined for the company using the Company Setup process.

United States	###-##-####
Canadian	###-###-###

Telephone causes the contents of the field to be formatted in one of the following ways. The actual format that you use is defined for the company using the Company Setup process.

(###) ###-####
###.###.####
####
###-###-####

Upper Case causes the contents of the field to be forced to upper case.

Note: Attributes for text fields can be changed using the Field Customization feature. The single quotation mark, double quotation mark, and bracket characters are not allowed in a text field. If these character keys are pressed, the keystrokes will be discarded.

Time

Time fields are used to store a time. The actual format used is based on the company's settings. For documents, the company's settings are always used for time fields.

Time fields are supported by the time popup. It uses an hour list, minute list, and AM/PM indicates to allow you to pick a time using mouse clicks rather than keying the time directly.

Yes/No

Yes/No fields use check boxes to capture the Yes or No value.

Popups

People-Trak provides a number of popup features to enable you to complete the entries in fields. The following is a list of the standard popup

- Color
- Date
- Document
- Email
- Field
- File

- Font
- Hyperlink
- Path
- Multi-Line Editor
- Table
- Time

As the cursor is moved around on a screen, different popup buttons are displayed adjacent to the text boxes to indicate the availability of a popup. Each popup listed above has its own popup button.

Color Popup

When the cursor is positioned to a color field, the only way you can select a color is to use the Color popup. When you click the popup button ▉ in a color field, a screen similar to the one shown below is displayed with the current color in the large square.

This popup allows you to select one of eleven basic colors or create a custom color. If you want to create a custom color, you can select Custom and then you will be taken to the more complex Color screen as shown below.
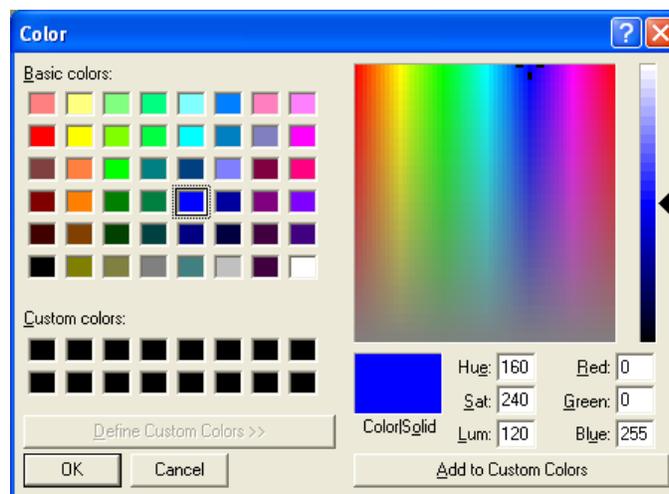
This color popup provides a list of basic colors and custom colors, a color spectrum area and a color preview (Color|Solid) area. When the popup is first displayed, the color preview area shows the color attribute of the current field. You can select any other color by clicking on the appropriate color field. The field will be reflected in the color preview area. You can also select any color field and then change its spectrum settings on the right to create a custom color. If you want to save that custom color for future use, click on one of the available custom color fields and then click the Add to Custom Colors button to add that custom color to that location. When the appropriate color has been selected or created, click the OK button to return the color to the field, or you can click the Cancel button to return to the color field without taking any action.

Date Popup

When a cursor is positioned to a date field, you can enter a date in one of three ways. You can key the date directly, you can enter the date using the Date Stamp feature, or you can use the Date popup. If you click the popup button ▦, the screen shown below is displayed.
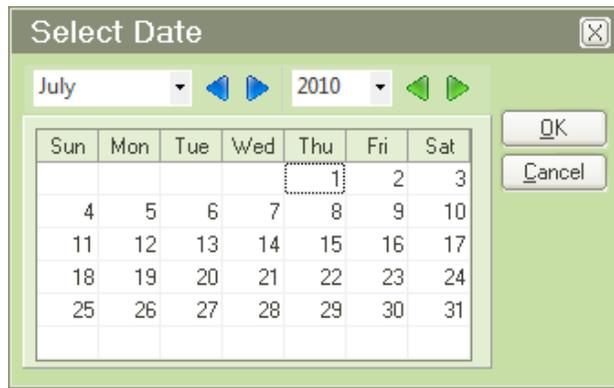
When the date popup is first displayed, the calendar is adjusted to display either the date currently in the field or the current date if the field is blank. You can move around the calendars using the various buttons until the date desired is displayed. You can then click the OK button to return the date to the field, or you can click the Cancel button to return to the date field without taking any action.

Document Popup

When the cursor is positioned to a document field, you can enter the document name directly or you can select a document using the Document popup. When you click the popup button ⏷, the screen shown below is displayed.
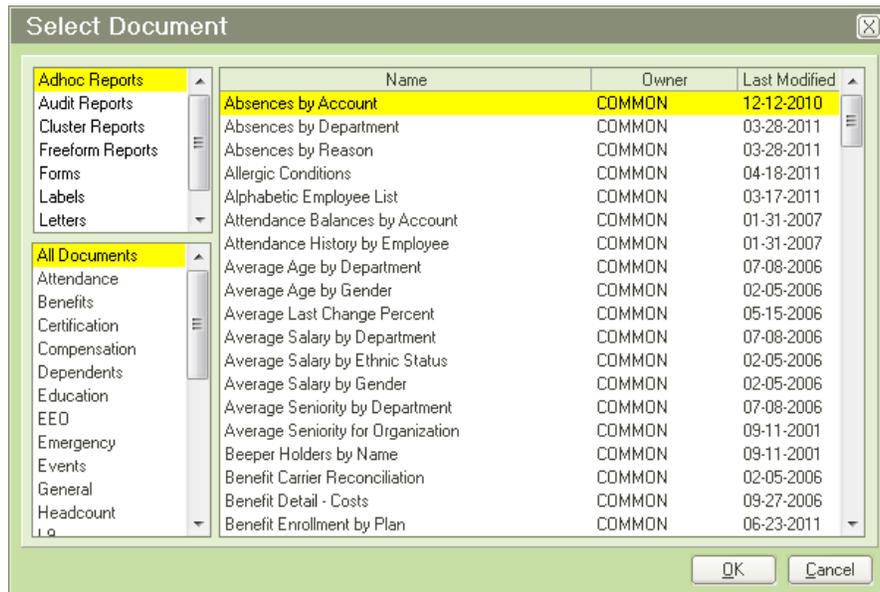
The document popup provides a list of document categories on the left and the documents in the highlighted category on the right. When you have located and highlighted the desired document, you can press ENTER, click the OK button or double-click the entry to return the document to the field, or you can click the Cancel button to return to the document field without taking any action.

Email Popup

When the cursor is positioned to a field supported by the email feature, you can click the popup button 🖃 and send an email using the Send Email screen shown below.

Field Popup

When the cursor is positioned to a field supported by the list of fields in the module, you can enter the field name in one of two ways. You can enter the field name directly or you can use the field popup. If you click the popup button ⏷, the screen shown below is displayed.
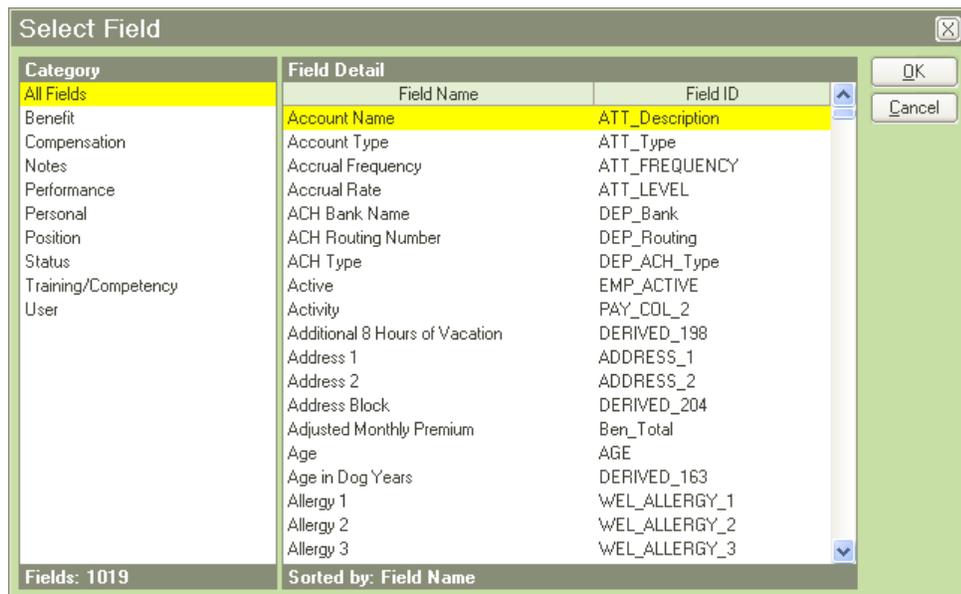
The field popup has a list of field categories on the left and a list of the fields in the current category on the right. There are five different types of field categories, which are listed below in the order they are found in the listing on the left side of the Select Field screen:

All Fields   This category includes all of the fields (including derived fields) in   the current module in alphabetic order.

Category   Each of the regular data entry and compound (created for you by putting regular fields together, i.e. Full Name) fields in People-Trak is assigned to a category. All of the different categories are listed.

Notes   This category includes all of the note fields.

System   This category includes system fields and is only available within   templates.

To select a field, click on the appropriate category in the list on the left. The fields in that category will then be displayed on the right. When you have located and highlighted the desired field, you can press ENTER, click the OK button or double-click the entry to return the field name to the field, or you can click the Cancel button to return to the field without taking any action.
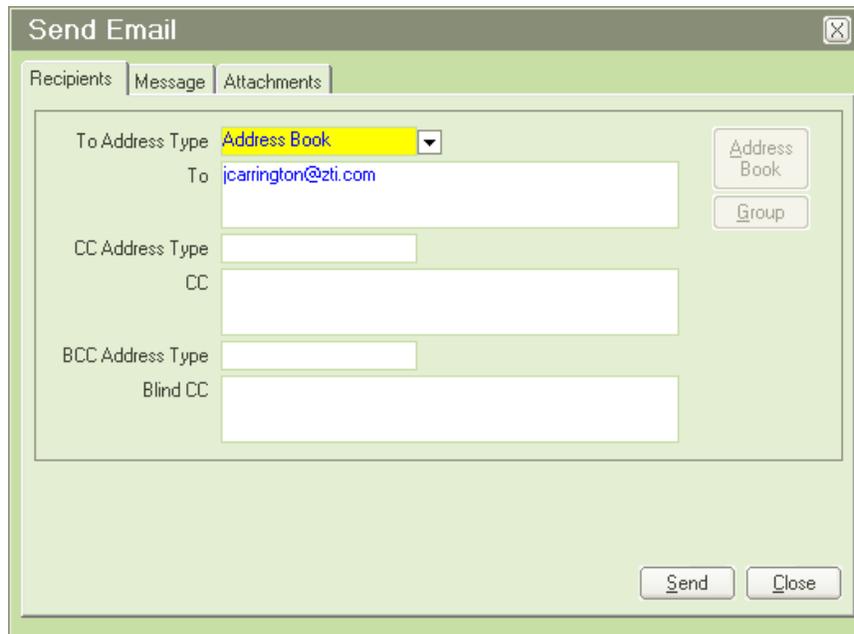
File Popup

When the cursor is positioned to a File field, you can enter a file in one of two ways. You can key the entire path and filename or you can use the file popup. If you click the popup button ▣, the screen shown below is displayed.
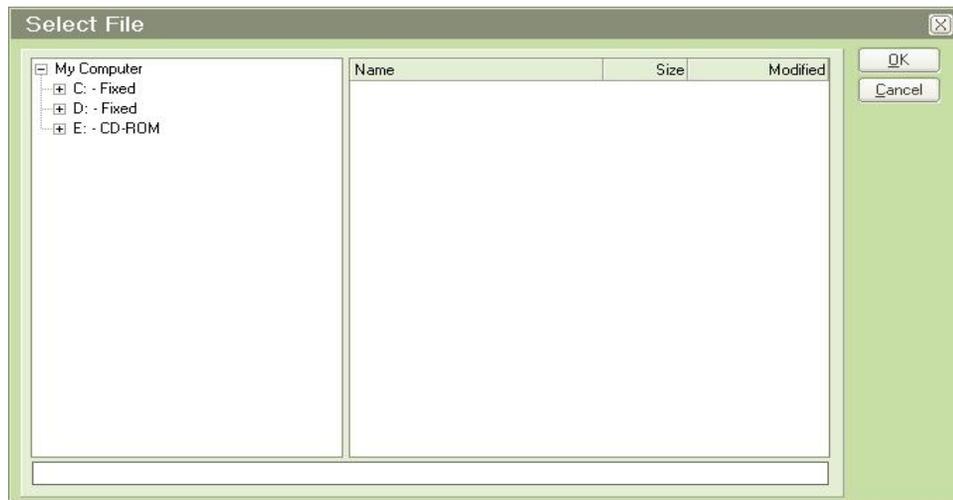
The file popup allows you to move through drives, folders, and files until you find the desired file, just like Windows Explorer. The current path and file is displayed in the text box at the bottom of the form. When the desired file has been selected, you can click the OK button to return the complete path and filename to the field or you can click the Cancel button to return to the file field without taking any action.

Font Popup

When the cursor is positioned to a Font field, the only way you can select a font is to use the Font popup. If you click the popup button Ⓐ, the screen shown below is displayed.
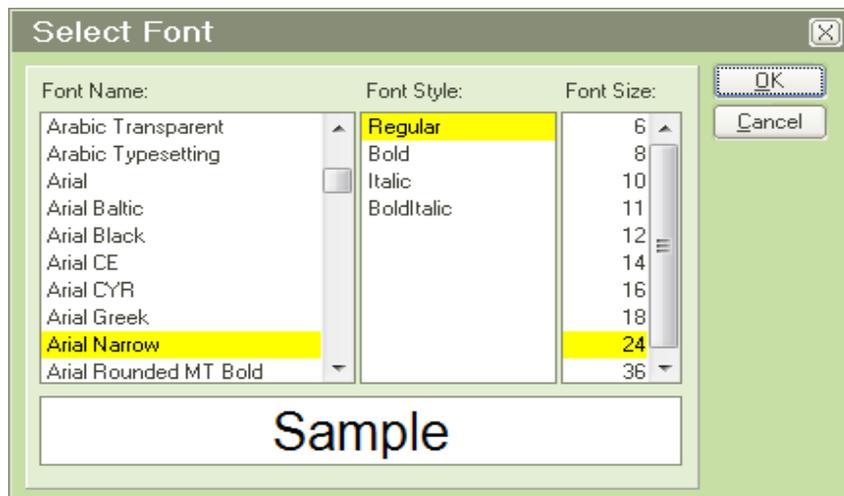
The font popup allows you to select the font name, the font style, and the font size. A preview section also allows you to see just what the font looks like with those attributes. When the popup is first displayed, the current settings for the name, style, and size are selected and the preview also reflects these settings. You can select any combination of these settings and monitor the visual effect in the preview section. When you are satisfied with your selections, you can click the OK button to return the three values to their respective fields on the screen, or you can click the Cancel button to return to the font field without taking any action.

Hyperlink Popup

When the cursor is positioned to a hyperlinked field, you can execute the hyperlink by clicking on the popup button ![i]. A hyperlinked field can contain a website address, ftp site address or a filename. EXE and BAT files are not allowed.

Path Popup

When the cursor is positioned to a Path field, you can enter a path in one of two ways. You can enter the entire directory path or you can use the path popup. If you click the path popup button 🗀, a Select Path screen similar to the Select File screen is shown, except that no files are displayed or can be selected.

Multi-Line Editor Popup

When the cursor is positioned to a multi-line field, you can key short phrases directly into the field. However, if you wish to key more text, or if you wish to view text that is not visible on the multi-line field, you should use the Multi-Line Editor popup. If you click the popup button ▶▶, the screen shown below is displayed.
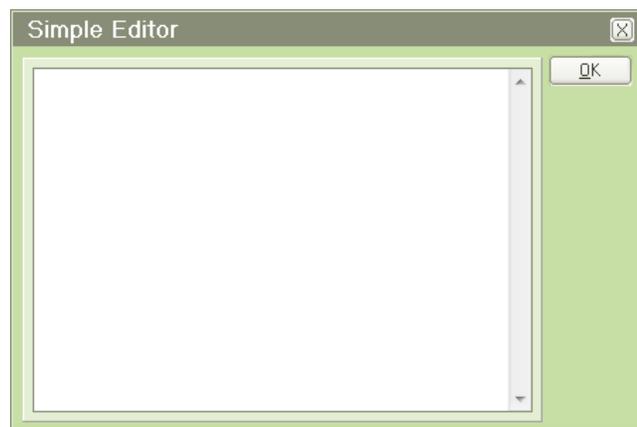
The multi-line editor popup allows you to key text using the ENTER key and with full scrolling features without the cursor moving to other fields. While the multi-line field on the original screen has a fixed size, the multi-line editor adjusts to fit the amount of text that has been entered. Thus, the editor not only acts as a place to key information, it allows you to view information that would not otherwise be visible.

When the desired text has been keyed or modified, you can click the OK button to return the text to the field, or you can click the Cancel button to return to the field without taking any action.

Tables and the Table Popup

People-Trak makes extensive use of tables. Tables are lists that contain user-defined or system-defined entries. These lists are available to assist in filling the corresponding fields in a given record. For example, the State field is a table field. Behind the State field is a table

containing a list of states. When the cursor is positioned to the State field, the table can be used to validate the state code entered, or to directly select the state from the table.

People-Trak utilizes both "system" tables and "user" tables. System tables are those that have been pre-defined within the product. These include custom report operators, links, date substitution variables and others, and cannot be changed. User tables are defined for use within the system, but are filled by the user as needed. User tables include cities, states, codes, and many others.

Table Validation

The validation of entries against each individual table can be set to three different levels: None, Optional, and Mandatory. When there is no validation (None), the table is simply ignored. When validation is Optional and a non-matching entry is made, the following message is displayed:

Entry is not in the table, Override Table?

Because the table is optional, the value can be accepted even though it is not in the table. To override the table and leave the entry, enter Yes. To discard the entry, enter No.

When validation is Mandatory and a non-matching entry is made, the following message is displayed:

Entry is not in the table

When any key is pressed, the entry is discarded and the cursor is returned to the field.

Note: When an optional table entry overrides the table, that entry is NOT moved into the table automatically. If you wish to move the entry into the table, it must be done using the table entry feature for that table.

Data Entry Using Tables

Table entries can be inserted into the record being edited in two ways. The first way is using the popup. The popup can be activated in two ways: the F3 key or the Table popup button ▼ adjacent to the field itself. When the popup is activated, the Select *Tablename* window is displayed. A sample is shown below.
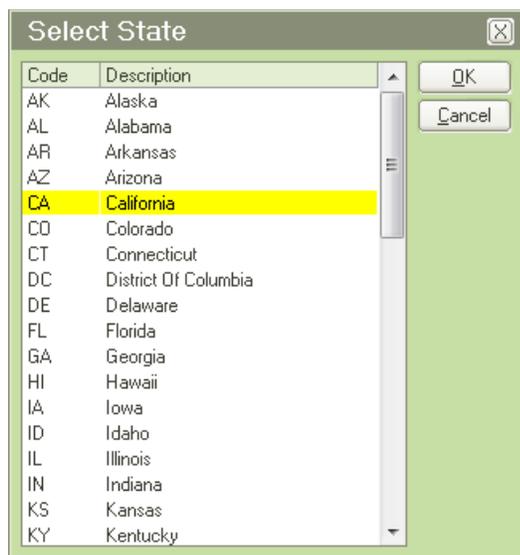
An entry can be selected using standard techniques or manually entered. If that table has mapped fields, they are automatically inserted into the record being edited, changed to the modified color and set to display only.

Tables are not available at every field. Whenever a table is available, the Table popup button is displayed to the immediate right of the field.

Note: The fields that are supported by tables and the tables used to support fields can be modified at any time using the Field Customization feature. It is possible to add table support to any text box based field. Table maps are maintained in the Map Table Fields utility.

Table Auto-Positioning

When you pop up a table and the field already contains an existing entry in the table, the current value is selected and highlighted.

Time Popup

When the cursor is positioned to a time field, you can enter a time in one of two ways. You can key the time directly or you can use the Time popup. If you click the popup button ⌚, the screen shown below is displayed.

The time popup provides a list box for the hour, a list box for the minutes, and two radio buttons to select AM or PM. When the time popup is first displayed, the list boxes and the radio buttons are adjusted to reflect the current value of the field if the field is not blank or the current time if the field is blank. You can use the features of the screen until the desired time is displayed. You can then click the OK button to return the time to the field, or you can click the Cancel button to return to the time field without taking any action.

Search Feature within Field, Document and Table Popups

In field, document and table popups, you can enter a single character or multiple characters to jump to the first entry that starts with that character or characters. For example, when in one of these popups, if you enter the letter "S", you will be taken to the first entry in the popup that starts with the letter "S". If you wait two seconds or more and then type in the letter "A", you will be taken to the first entry in the popup that starts with the letter "A". If you type in the letters "SAN" quickly, you will be taken to the first entry that starts with the letters "SAN".

Key Functions

The following is a list and description of the standard key functions, in alphabetic order.

BACKSPACE

Moves the cursor to the left one character while deleting the character on which the cursor is sitting.

CTRL + PAGE DOWN

Selects the next available record in the record dropdown. If the last record is the current record, the first record becomes the current record and is displayed. This feature is only applicable when editing records. The next record function is also available using the Next Record button on the Tool Bar.

CTRL + PAGE UP

Selects the previous record in the record dropdown. If the first record is the current record, the last record becomes the current record and is displayed. This feature is only applicable when editing records. The previous record function is also available using the Previous Record button on the Tool Bar.

DELETE

Deletes the currently highlighted text within a field. If no text is highlighted, it will delete one character of text at a time.

DOWN ARROW

Moves the cursor from the current field to the next field. If the cursor is positioned to the last field on the screen, it is moved to the first field on the screen. On a grid, the DOWN ARROW key moves the cursor down one row while remaining in the current column.

END

Moves the cursor to the end of the current field.

ENTER

Moves the cursor to the next field. On a screen, the ENTER key will cause the cursor to cycle through all of the fields. When the cursor is positioned to the last field on the screen, the cursor will move to the first field on the screen. On a grid, if the cursor is positioned to the last field in a row, the cursor moves to the first field on the next row.

F1

Displays field properties and field help. SHIFT + F1 displays screen help.

F2

Invokes the Open Record feature.

F3

Invokes any applicable popup feature for the current field.

F4

On a Date field: Activates the date stamp feature and places the current value of the date stamp into the current field.On a Time field: Places the current time into the current field.

F5

Invokes the Run/Edit feature.

F6

Invokes the Print Screen feature.

F8

Deletes the current row on a grid. All subsequent rows are pulled up to fill the deleted space. The Delete Row option is also available as an option on the Edit menu and as a button on the Tool Bar.

F9

Inserts a new blank row into a grid at the current row. All subsequent rows are pushed down to accommodate the new row. The Insert Row option is also available as an option on the Edit menu and as a button on the Tool Bar.

F10

Moves cursor to the first menu on the Menu Bar. (Microsoft Standard)

HOME

Moves the cursor to the beginning of the current field.

LEFT ARROW

Moves the cursor from the current character in the field to the previous character in the field. If the cursor is positioned to the first character in the field, the cursor does not move.

PAGE DOWN

Selects the next available screen in the screen dropdown. If the last screen is the current screen, the first screen becomes the current screen and is displayed. This feature is only applicable when editing records. The next screen function is also available using the Next Screen button on the Tool Bar.

PAGE UP

Selects the previous screen in the screen dropdown. If the first screen is the current record, the last screen becomes the current screen and is displayed. This feature is only applicable when editing records. The previous screen function is also available using the Previous Screen button on the Tool Bar.

RIGHT ARROW

Moves the cursor from the current character in a field to the next character in the field. If the cursor is positioned to the last character in the field, the cursor does not move.

SHIFT + TAB

Moves the cursor from the current field to the prior field. On a screen, SHIFT + TAB will cause the cursor to cycle through all of the fields. When the cursor is positioned to the first field on the screen, the cursor will move to the last field on the screen. On a grid, the cursor is moved backward one field on the current row. If the cursor is positioned to the first field on the row, the cursor is moved to the last field on the prior row.

SPACEBAR

Toggles a check box from selected to cleared or vice versa.

TAB

Within a field, the TAB key is used to save the additions or changes that have been made and to move the cursor to the next field. The TAB key is also used to move the focus from one command button to another.

UP ARROW

Moves the cursor from the current field to the previous field. If the cursor is positioned to the first field on the screen, it is moved to the last field on the screen. On a grid, the UP ARROW key moves the cursor up one row while remaining in the current column.

File Menu Functions

The File menu is used throughout People-Trak to perform various file functions. **Note:** In the procedures below, it is assumed you are already in the appropriate item screen, and when you see the *Item* placeholder, this refers to the item that is using the procedure. For example, when you are copying an Adhoc Report, you need to be in the Explorer - Adhoc Reports screen and the Copy *Item* phrase is actually Copy Adhoc Report on the File menu.

New

Creates a new item with an item name of "NEW-" followed by a sequential number. For example, if you create a new Adhoc Report, the report name will be NEW-1. If that report name already exists, the report name will be NEW-2, and so on.

Save

Saves the current item to the database and stays in that current item.

Delete

Deletes the current item from the database.

Copy

Creates a new item just like the New function, except with an item name of the copied item's name with "-1" appended. If the "-1" item name exists, the name of the new item will have a "-2" appended, and so on. It then copies the original item over that new item. For example, if you copy the Alphabetic Employee List document, a new document with the name Alphabetic Employee List-1 is created as an exact copy of the original document. If that report name already exists, the report name will be Alphabetic Employee List-2, and so on.

Field Help

Field help is available at any field and can be activated by using the F1 key or the Show Field Help button on the Tool Bar. When this option is used, the Field Name help screen is displayed with an overview of the selected field.

There is also a Usage tree view that provides a listing of places where this field is used. This information can be very helpful in determining all of the places the field is used and how it is updated. If you would like to view the help text for a usage item, select that item in the list and the description will be displayed in the viewing area.

Properties and attributes related to the field are displayed within the Properties and Attributes frame.

Screen Help

Screen help is available at any screen and can be activated by using the SHIFT + F1 key sequence or the Show Screen Help button on the Tool Bar. If the screen does not have a Show Screen Help button, the key sequence will display Screen Help. When this option is used, the Screen Help screen is displayed with an an overview of the selected screen which includes screen properties.

The Screen Objects tree view provides a listing of objects and fields used on the screen as well as their descriptions.

There is also a Usage tree view that provides a listing of places where this screen is used. This information can be very helpful in determining all of the places the screen is used and how it is updated. If you would like to view the help text for a usage item, select that item in the list and the description will be displayed in the viewing area.

Help Topics

Help Topics are available from the Organizer desktop or any screen by using the Help Topics option on the Help menu. Selecting the Help Topics option displays the Help Viewer.

Help documents can be accessed via the three tabs that are available on the left side of the screen and are easily viewed in the display area on the right.

The Contents tab displays a preloaded list of reference documents when the Help Viewer is first selected. Contents displays a list of the documents in a three level tree view organized first by document, chapters within the document, and then by sections in each chapter. The document and chapter levels contain descriptions about the particular document or chapter. Articles can be selected at the section level. Once an article in the section level is selected, it can be read in the display area.

The Index tab displays an alphabetic list of contexts. Once an article in the list is selected, it can be read in the display area.

The Search tab article results are blank when the Help Viewer is first opened. To search articles, enter the desired phrase or text in the search box and select the Go button. All articles containing the phrase in the heading or article contents will be returned to the Search pane in list format. Once an article in the list is selected, it can be read in the display area.

When an article under any of the tabs is selected, it is displayed in the right hand area of the screen. The article will remain in the display area until a new article is selected. Switching tabs will continue to display that same article until a new search is performed or another article is selected.

Support Online

This option allows you to connect to the People-Trak customer support website. On the support website, you can download patches, review newsletters, provide feedback, and communicate with your Support Representative.

Help About

This option displays your People-Trak license and options information.

Notes

Lesson 1
Getting Started

Lesson Contents

This lesson covers some of the essential tasks to get started with People-Trak as well as the three different People-Trak views, known as desktops.

Tutorials

Start People-Trak: shows how to start People-Trak and get logged in. It also goes over how the login process works.

Menu Navigation: demonstrates how to navigate the People-Trak menus.

Organizer Desktop: covers the Organizer desktop, where administrative tasks are done and processes are accessed by module.

Changing the Current Company: demonstrates how to change the current company.

Stop People-Trak: shows how to close open screens and stop People-Trak.

Tutorial 1.1 – Start People-Trak

Let's learn how to start People-Trak and then take a look at the login process.

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. This screen is used for training purposes and allows you to set the product options applicable to your particular training session. All of the basic training classes use the base People-Trak product with only the Position Control and Attendance options selected. The Select Product Options screen toggles these options when the Training button is selected. Since most People-Trak customers have implemented the Position Control and Attendance options, training is normally performed with those options selected. If you are not currently using these options, you will learn about them and see some of their capabilities within the training courses.

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. The Login screen is the gateway to People-Trak. The User ID/Password combination you enter here determines which processes you can use and which information you can see. When the Login screen is displayed, the cursor is positioned to the User ID field. Let's learn a few things about entering user/password combinations as well as other information in People-Trak.

4. In the **User ID** field, enter **DEMO** and press **TAB**.

   The cursor moves to the Password field.

5. In the **Password** field, enter **BOGUS**, but do <u>not</u> 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 represent the characters being typed. The actual characters of the password are not displayed for security reasons.

6. Press **ENTER** when complete or click the **OK** button.

   The following message is displayed because the password BOGUS is indeed bogus:

7. Invalid login

8. 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 the button.

9. Press **ENTER** to continue.

   The User ID and Password fields are cleared and the cursor is returned to the User ID field so that you may try again. Each time you run People-Trak, you have three attempts to enter a correct user/password combination. If the third attempt fails, People-Trak closes. Let's demonstrate this.

10. In the **User ID** and **Password** fields, enter **BOGUS**. This time, use the mouse to click the **OK** button. Repeat this process one more time.

    After the third attempt, People-Trak closes. People-Trak has assumed that you are an unwanted intruder because you do not know a valid password, so you are forced 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.

11. Run People-Trak again by double-clicking on the **People-Trak Trainee** icon on your desktop.

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

13. Click **OK**

    The Login screen is again displayed.

14. In the **User ID** field, enter **DEMO**. In the **Password** field, enter **DEMO**. Then press **ENTER**.

    The People-Trak Organizer screen is displayed. The Personnel Management module is selected for you and is highlighted in the Modules listing. The Personnel Management module is just one of several standard modules that are used to capture and use data in People-Trak.

15. Continue with the next tutorial.

Tutorial 1.2 – 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. First, make sure that the **Personnel Management** module is still highlighted in the Modules listing. If it is not highlighted, click **Personnel Management** to select that module, which will highlight it.

   People-Trak uses standard Windows operating conventions. You can see the Menu Bar at the top of the screen. You can activate the menu using the mouse to click the menu caption, (or you can press ALT and the underlined letter in the menu title for you keyboard people). Let's try it now.

2. Use the mouse to click on the **File** menu.

   The menu drops down and lists the various options that are available. You can highlight and select any available option. We'll do that later. For now, let's close the menu.

3. To close a menu, move the mouse off the menu and click.

   The menu is closed. You can also close a menu by pressing the ESC key.

   Now is a good time for you to peruse each of the menus.

4. 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. 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, click the **File** menu and then select the **Open Employee** option.

   The Lookup Employee screen is displayed. We'll learn more about this later.

6. For now, click the **Cancel** button to close the **Lookup Employee** screen.

   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.

   Now that you know how to navigate menus, we can start exploring the desktop.

7. Continue with the next tutorial.

Tutorial 1.3 – Organizer Desktop

Now, let's take a look at the Organizer desktop.

The overall screen environment that you are currently viewing is known as the Organizer desktop. The Organizer desktop has a Menu Bar across the top and a Shortcut Bar down the left side. It also has four areas, which we will refer to as "panes": Modules, Categories, Tasks and People-Trak News.

We have already learned about menu navigation so let's look at the Shortcut Bar, which provides shortcut icons much like Microsoft Outlook. These icons are used to activate frequently performed tasks such as creating records, opening records, showing the Inbox, etc. All of the shortcuts are also listed on the menus at the top of the screen. Let's take a look.

1. Open the **File** menu.

    Many of the shortcuts come from the File menu as you can see here. The little icons at the left edge of the menu are smaller versions of the same icons used in the shortcuts. Both the shortcut and the menu options will start the option. We provide both for your convenience. Each user will settle into his or her personal way of using the product.

2. On the **File** menu, select **Open Employee**.

    The Lookup Employee screen is displayed.

3. Click the **Cancel** button to close the **Lookup Employee** screen.

4. On the Shortcut Bar, click the **Open Employee** shortcut.

    Once again, the Lookup Employee screen is displayed.

5. Close the **Lookup Employee** screen again.

    You see, the File menu options and the shortcuts perform the same task.

    When we started People-Trak, the first module in the Modules pane, Personnel Management, was highlighted. It became the current module by default. When you used the Open Employee options to select a record, an employee record from the Personnel Management module was selected. We can, however, use the features in any module. Let's select another module now.

6. Select the **Safety Management** module by clicking on that name in the module list.

    You can see that changes, based on the new module, have occurred in the following three areas of the screen: the Menu Bar options, the Shortcut Bar icons, and the Organizer categories.

7. Use what you have just learned and return to the **Personnel Management** module.

    In all modules, the various screens, tables, reports, activities, and processing options have been divided into categories. You can see the list of categories for the Personnel Management module in the Categories pane of the desktop. This pane utilizes a tree-view control that allows you to expand and contract the entries to show additional entries. Let's use tree-view navigation now.

8. Click the "+" sign adjacent to the **Attendance** category.

    Note that the category opens up to display a list of subcategories. For each category, the available subcategories are the same, but not all may be shown. The subcategories include: activities, processing, documents, tables, and workflows. If a category has options in one of these subcategories, the subcategory will be shown. Now, let's open up a subcategory.

9. Click the "+" sign adjacent to the **Processing** subcategory to display a list of the processing menu options associated with the **Attendance** category.

10. Click the "+" sign adjacent to the **Documents** subcategory to display a list of the documents available in the **Attendance** category. Click the "-" sign adjacent to the **Documents** subcategory to close that subcategory. You can move among the categories and subcategories quite readily, opening and closing as you see fit.

    The options listed are not merely listed for organizational purposes. You can run the option right from the organizer.

11. In the **Processing** category for **Attendance**, click the **Attendance Batch by Employee** option to select it.

    The data entry screen for that option is displayed, just as if you had selected the option from the menu.

12. Close the **Attendance Batch by Employee** screen by clicking on the **X** in the upper right-hand corner of that screen.

13. Find this option on the **Processing** menu itself and select it there.

    As you can see, there are two entirely different ways of selecting options.

14. Close the **Attendance Batch by Employee** screen.

    The Tasks pane allows you to have activities, documents, processing, tables, links and workflows available in a simple list. This one list can have tasks from any module and allows you to have a "my world" view of People-Trak. This Tasks pane stays the same no matter what module is selected. Let's demonstrate this while learning how to navigate this pane.

    Tasks can be grouped however you choose. We have already selected and grouped some tasks for the DEMO user and those groupings are listed in the Tasks pane in the order they are listed in Desktop Setup. You can open a group just like you opened a category in the Categories pane.

15. In the **Tasks** pane, click the "+" sign adjacent to the first group name.

    The tasks in that group are displayed.

16. Click the "**-**" that is now displayed next to that group name to close that group. Simple.

17. Now, open all of the task groups so you can see all of the tasks, which are from several modules.

    Now, we want to see if these tasks change when you switch modules.

18. Switch to the **Safety Management** module and check the **Tasks** pane. Are they the same?

    Yes! You can work from your Tasks pane and have the same list no matter what module you are in currently. When you select a task from a different module than you are in currently, you will be automatically switched to the correct module and the task will be executed. When the task is completed, you will be returned to the module you were in when you selected the task. Let's see how this works.

19. You should still be in the **Safety Management** module. In the **Tasks** pane under the **My Workflows** category, click the **Standard - Applicant** option to select it.

    The module is automatically switched to Applicant Management and the Lookup Applicant screen is displayed.

20. Click **Search** and then click **OK** to select all applicants.

    The Standard - Applicant workflow is opened.

21. Close the **Standard - Applicant** workflow by clicking on the **X** to the far right of the **Standard - Applicant** title.

    You are automatically returned to the Safety Management module, which you were in when you selected the task.

22. In the **Tasks** pane under the **My Activities** category, select **Candidate Manager**.

    This is a feature in the Position Control module that allows managers and recruiters to view and update both open positions and the candidates who have applied. Again, you did not have to switch to the Position Control module or locate the Candidate Manager on the appropriate menu. People-Trak did that for you.

23. Close the **Candidate Manager**.

    As you can see, using the Tasks list is a much faster and easier way of running commonly-used tasks.

    The People-Trak News pane includes links to the latest information provided by People-Trak. The links in this area will be updated nightly when running the NightRun process. You can view video tips, customer notifications and other important information to keep you up-to-date. There will be up to ten links as well as an Archive link, which accesses an index of past news items.

24. In the **People-Trak News** pane, simply click on any link to access that news item.

    The web browser is opened and uses that link.

25. If you are taking this class via WebEx, close the tab for that link on your web browser (leaving your WebEx tab still open) and press **ALT** + **TAB** to return to People-Trak. If you are <u>not</u> taking this class via WebEx, close your web browser, and you will be returned to People-Trak.

    Take a quick look at the Status Bar, which is located at the bottom of the desktop. It contains panels for messages, a progress monitor (both blank at the moment), the People-

Trak version, the database type, the system date, the user type and the record counter (the current number of employee records used out of the total number of licensed records).

26. Continue with the next tutorial.

Tutorial 1.4 – Changing the Current Company

You can change the current company to any other company to which you have access.

1. On the **File** menu, select **Select Company** or on the Shortcut Bar, click the **Select Company** shortcut.

   The Select Company screen is displayed. A list of the companies to which you have been granted access (not including the current one) is displayed in the list on the left and the first company is highlighted. Information for the selected company is shown on the right. None of this information can be changed on this screen. To edit the company information, you must use the Company Setup process on the Setup menu.

   Note: If you only have access to one company, the Select Company feature is not available on the File menu and is disabled on the Shortcut Bar.

   To select a company, highlight the company name and click OK.

2. Go ahead and select the **ARCHIVE** company.

   The ARCHIVE company's logo and name are displayed in the Header.

   You may now continue processing just as before except that all processing will now be within the company to which you have just switched. Nothing else has changed. You are just working with a different collection of data.

   Let's switch back to the ACTIVE company.

3. Use the **Select Company** process to switch back to the **ACTIVE** company.

4. Continue with the next tutorial.

Tutorial 1.5 – Stop People-Trak

Screens can be closed using the two standard Windows methods. You can use the Close (X) button in the upper right-hand corner of the screen, or you can use the appropriate option on the File menu. 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. If any screens are in use when it is time to exit, that screen and any other open screens must first be closed. Let's set up this scenario and then exit.

1. On the **Tools** menu, select **Maintain Tables**. From the list of tables on the right, select the **Allergy** table and click the **Edit** button.

   Unofficially, you are now editing the Allergy table. Now let's assume that it's time to go to lunch and you wish to exit.

2. On the **File** menu, select **Exit** or click the **X** in the upper right-hand corner of the screen.

   Since you didn't make any changes to the table, both of these options will just close the Allergy screen and return you to the **Maintain Tables** screen.

3. Click the **Close** button to close the screen.

4. On the **File** menu, select **Logoff DEMO** or on the Shortcut Bar, click the **Logoff** shortcut.

   The Login screen is displayed. On the Login screen, you can either log in again, or you can exit. We'll try both.

5. First, log in with **DEMO/DEMO**.

6. Once logged in, click the **Logoff** shortcut to log off again.

   The Login screen is displayed.

7. This time, click the **Cancel** button to close the **Login** screen and exit People-Trak.

   You can also exit People-Trak directly from one of the desktops. Let's give that a try.

8. Run People-Trak again by double-clicking on the **People-Trak Trainee** icon on your desktop.

9. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select then and click **OK**.

10. When the **Login** screen is displayed, login as **DEMO/DEMO**.

11. Click the **X** in the upper right-hand corner of the Organizer desktop.

    The following message is displayed:

    Do you wish to exit People-Trak?

12. Click **Yes**. You can use this method from any desktop.

13. Continue with the next tutorial.

Lesson 2
Navigation and Validation

Lesson Contents

This lesson gives you a tour of the Workflow Area and covers the fundamentals of how to navigate screens and subscreens. It also covers data validation and formatting examples.

Tutorials

Workflow Area: tours the workflow area available when a record is open for processing.

Screen Navigation: demonstrates multiple ways to navigate People-Trak screens.

Selecting Subscreens: shows how to select subscreens in People-Trak.

Data Validation: covers how data is validated during data entry.

Formatting Examples: gives some examples of how the different formatting attributes of fields work.

Tutorial 2.1 – Workflow Area

When you open a record for processing, you are in what we refer to as the "Workflow Area". In this tutorial, you will take a tour of the Workflow Area to get more familiar with it.

1. Run People-Trak again by double-clicking on the **People-Trak Trainee** icon on your desktop.

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 and click **OK**

3. When the **Login** screen is displayed, login as **DEMO/DEMO**.

   The Personnel Management module becomes the current module.

4. On the **File** menu, select **Open Employee** or on the Shortcut Bar, click the Open Employee shortcut or press the **F2** key to open an employee.

   The Lookup Employee screen is displayed.

5. Click the **Search** button to display the list of records for the current company. Select **Donald Stern** from the list by double-clicking on that row (or highlighting the row and clicking **OK**).

   You have now entered into the Workflow Area. Like the desktop, there is a Menu Bar starting with the File menu.

   Let's peruse these menus like you did on the desktop.

6. Select each of the menus listed and review the menu. Do not select any of the menu options themselves at this time. Once you have made yourself familiar with the menus, continue with the next step.

   Right below the Menu Bar is the Tool Bar. Each button on the Tool Bar has a graphical icon on it that helps denote what it is. These icons are also used on the File menu. Let's take a look.

7. Click on the **File** menu and look at the icon next to **New Employee**. It is an open folder with a sunburst. Close the menu.

8. Look at the first button on the Tool Bar. Its icon is the same so it must be **New Employee.** Let's find out how to know what this button does.

   If you move the mouse over a button on the Tool Bar and right click, a tooltip will display giving a description of that button.

   Now, let's take a look at some tooltips.

9. Start with the first button on the Tool Bar and move the mouse over that button and right click.

   You will see that the first button has a tooltip of **New Employee**. Just as we thought!

10. Now, perform the same action for each of the buttons on the Tool Bar to familiarize yourself with what each button does. If a button is dimmed, it is disabled.

Immediately below the Tool Bar are the Navigation and Category bars. The Navigation Bar contains the Records section which contains features for navigating groups of records. The Category Bar contains the Screen dropdown for navigating the various screens available in the current module and features four category buttons. You will learn about record navigation in Data Entry training. We will take a look at screen navigation in the next tutorial.

For now, let's see what those last four buttons do.

11. Right click on each of the buttons at the far right of the Category Bar to discover what each does.

Now that you are familiar with the Workflow Area you are ready to begin using it.

12. Continue with the next tutorial.

Tutorial 2.2 – 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. You should still be in **Donald Stern's** record with the **Personal** screen displayed.

    The name of the current screen is listed in the Screen dropdown on the Category Bar. Look for the phrase Personal. This box acts as both a label for the current screen as well as a list box for selecting any of the other screens. Let's use this Screen dropdown to select a different screen now.

2. Use the mouse to click on the arrow button connected to the Screen dropdown. A list of the available screens is displayed. Click the **Status** screen to select it.

    The Status screen with the status information for Donald Stern is displayed.

3. Try it again. Select any of the screens listed and view the information.

    There are a couple of other techniques that can be used to move to another screen. Let's try these now.

4. Find the green arrow buttons just to the right of the **Screen** dropdown. Click the **Right Arrow** button.

    The next screen is displayed and the screen name in the Screen dropdown is updated. The next screen that is displayed is always the next screen relative to the current position in the Screen 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.

    You have probably already guessed, but the left arrow acts identically to the right arrow except in the opposite direction.

5. Click the **Left Arrow** button now.

    Again, note how the screen name in the Screen dropdown is updated to let you know where you are.

    There is one final method for browsing through the screens using keys on your keyboard. The PAGE UP and PAGE DOWN keys perform the same functions as the Right and Left Arrow buttons.

6. Try the **PAGE UP** and **PAGE DOWN** keys now.

    The succeeding and preceding screens are displayed and the screen name is updated in the Screen dropdown.

    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 Screen 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.

7. Use any desired technique to return to the **Personal** screen.

8. Continue with the next tutorial.

Tutorial 2.3 – Selecting Sub Screens

There are both full-screen data entry screens, referred to as "primary" screens, listed in the Screen dropdown and sub screens that are used to capture and display additional information that is related to the general category defined by the primary screen. For example, on the Personal primary screen, there are sub screens for emergency contacts, dependents, education and experience, just to name a few. Let's show you some sub screens and how to select them.

1. You should still be in the **Personal** screen for **Donald Stern**.

   Note that there are four large buttons on the right-hand side of the Personal screen. Each of these buttons is labeled with the name of a sub screen.

   The technique used to display a sub screen is quite simple. Just use the mouse to click on the button.

2. Click the **Emergency** button.

   The Emergency Contacts sub screen is displayed so you can view the additional information regarding the emergency contacts for Donald Stern.

   Each sub screen has a Menu Bar, Tool Bar and Navigation Bar 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 use the X button and see how that works.

3. Make a simple change to the **Emergency Contacts** sub screen. Then click the **X** button to close the sub screen.

   The following message is displayed:

   Do you want to save the changes in process?

4. Click the **Yes** button to save the changes from this visit to the sub screen.

   Note: By clicking Yes, you are ensuring that the changes you made in this sub screen stay active. The changes are not saved to the database until the record itself is saved.

   If you had clicked the No button, the changes (any and all) would have been ignored. If you had clicked the Cancel button, you would have been left on the sub screen to continue processing.

5. Click the **Emergency** button to go back into the **Emergency Contacts** sub screen.

   As you can see, your change is still there in the modified color, which is red in the current color scheme.

6. Click the **X** button to close the sub screen.

   You aren't asked to save any changes because you didn't make any further changes in that editing session.

7. Click the **Emergency** button to go back into the **Emergency Contacts** sub screen.

    Your change is still there. If you had made a change in the second editing session and did not save that change, your first change still would have been there.

8. Click the **X** button to close the sub screen.

    Once you have selected a sub screen, you cannot select another sub screen until you return to the current primary screen.

9. To see for yourself, click the **Dependents** button. While the **Dependents** screen is displayed, try clicking the buttons for all of the other sub screens.

    As you can see, they are disabled.

10. Close the **Dependents** screen.

11. Now try the sub screens for **Education** and **Experience** just to show that sub screens all work alike.

    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 viewing the sub screens. Try it now.

12. Browse through the primary screens and take a look at what sub screens are included on each.

13. Continue with the next tutorial.

Tutorial 2.4 – 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. Use your newly acquired screen navigation skills to select the **Compensation** screen. Then, in the **Current Pay** frame, click in the **Pay Rate** field.

   The Pay Rate field is a numeric field and can only accept numeric values.

2. Try entering 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.

   This is an example of data being validated when keys are pressed. Let's look at one more.

3. Return to the **Personal** screen.

4. In the **Birth Date** field, highlight the contents of the field and then press **DELETE** to clear the field. Try entering **03-.**

   Nothing happens when you press "-". If you tried "/", that wouldn't work either.

5. After the **03** that is already showing, try entering **22**.

   Voilà! The date now reads 03-22.

   Note: People-Trak uses your PC's regional format settings for dates. Our date examples assume a "m-d-yyyy" date format. You can change your PC's regional settings using the Windows Control Panel and going into the Regional and Language Options. We won't take the time now to have you make that journey, so if this is something you are interested in doing, contact your Support Representative if you have questions on this topic.

6. Now type in **1963** after the **22**.

   The date should now read "03-22-1963". People-Trak automatically put in the date separators for you. This is an example of data validation when keys are pressed (only allowing numbers) and entry formatting (automatically putting in the separators) all-in-one. We will take a closer look at entry formatting in the next tutorial.

   Now let's look at data validation that is done when you leave a field.

7. In the **Birth Date** field, enter **33-33-3333** and press **ENTER**.

   Note: The phrase "enter" in "enter 33-33-3333" means to first clear any existing data in the given field and then enter the data as directed. This is true here and in all further references to "enter" until we learn about popups, which will put a slightly different spin on this word.

   The following message is displayed:

   Invalid date

This date is invalid because there are only 12 months in a year and no more than 31 days in a month.

8. Click **OK** to accept the message.

   Data entry errors are not always as obvious as this outrageous date.

9. Go back to the **Birth Date** field and enter **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.

10. Try entering a birth date of **February 29** in a non-leap year.

   The invalid data entry will be caught and rejected before it can be stored in the database.

   As mentioned, validation must occur whenever you leave the field, not just when you press the **ENTER** key or **TAB** key. Try this.

11. 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.

12. Continue with the next tutorial.

Tutorial 2.5 – Formatting Examples

Formatting is the process of displaying data in a desired form. There are many ways to display 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. Click in the **Last Name** field.

    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 by double-clicking to highlight the field and then pressing the **DELETE** key. Enter the last name **jones** in full lower case and press **ENTER**.

    The last name will be reformatted to Jones.

3. Try it again, but key the entire name in upper case. When you press **ENTER**, the last name will be formatted as before.

    The proper case attribute is reasonably smart when it comes to formal names.

4. To see what we mean, enter the last name **macdougal** in any desired case pattern and watch what happens when you press the **ENTER** key.

    The last name is 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.

    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's see how this works.

5. Select the **Compensation** screen. In the **Current Pay** frame, click in the **Pay Rate** field.

    This field has the format "#########.##" which means that you can enter up to up to nine digits to the left of the decimal place and only two digits are allowed to the right of the decimal place. If you enter more than two digits to the right of the decimal place, the number will be truncated at the second decimal place.

6. Enter ten **9**'s.

    You receive a validation error because the entry is not valid according to the format, which specifies a max of nine digits to the left of the decimal place.

7. Go back to the **Pay Rate** field and enter **4999.9**.

    You will not receive a validation error, because the value is formatted to 4999.90.

8. Go back to the **Pay Rate** field and enter **4999.999**.

You entered three decimal places, so the number is truncated at the second decimal place, for a result of 4999.99.

9. Select the **Personal** screen.

Remember the entry formatting you saw in the Birth Date field in the last tutorial? Let's look at it again.

10. In the **Birth Date** field, enter **04-15-1960**.

As before, the "-" is entered for you. This is an example of entry formatting, which is unique to date fields. In our case, we are using the date format of "m-d-yyyy", so the "-" was added for us. Let's close Donald's record, without saving changes. You can do this by clicking the X in the upper right-hand corner of a primary screen (not the X in the People-Trak bar).

11. Click the **X** in the upper right-hand corner of the primary screen (in the Standard-Employee bar).

The following message is displayed:

Do you want to save the changes in process?

12. Click **No** to not save the changes.

This is the only way to close a record without saving changes. You can also close a record by doing one of the following, but all of these ways automatically save your changes to the current record:

a. Use the New *Record* option on the File menu or Tool Bar
b. Use the Open *Record* option on the File menu or Tool Bar
c. Use the Close *Record* option on the File menu or Tool Bar
d. Use the Exit option on the File menu
e. Change to another record in the record group

Note: *Record* stands for the name of the primary record for a module. In Personnel Management, the option would be Close Employee.

13. Continue with the next tutorial.

Notes

Lesson 3
Row and Undo Functions

Lesson Contents

This lesson covers how to work with grids, including inserting, deleting and sorting rows in a grid. It also covers how to undo changes in a field, as well as an entire screen.

Tutorials

Insert and Delete Rows in a Grid: shows how to insert and delete rows in a data entry grid.

Sorting Rows in a Grid: shows how to sort rows in a grid.

Undo Fields: demonstrates how to use the undo field feature to undo one or more changes in a field.

Undo All Changes: demonstrates how to undo all changes made during the current session.

Tutorial 3.1 – Insert and Delete Rows in a Grid

In this tutorial, you will learn how to insert and delete rows in a grid.

1. Open **Donald Stern's** record.

2. Select the **Performance** screen.

    Note that Donald has multiple performance appraisal rows in the grid.

    There is no limit to the number of performance appraisal rows available, but only a portion of these can be seen at any one time. To view performance appraisal rows that 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.) When a grid is first displayed, the existing data is displayed plus 50 blank rows. If you need to enter more than 50 rows of new data, you can click the Save button and you will be given an additional 50 blank rows.

    When rows in a grid are dated, it is strongly recommended that the rows be maintained in descending order, with most recent date first. To do this you need to know how to insert rows.

3. Check the Tool Bar and note that the **Insert Row** button is enabled. Click that button.

    Note that all subsequent rows are pushed down and that the current record is cleared for a new entry. You can insert a row for a new first record, or you can insert a row at any other row.

4. Try inserting rows at any other row and do not worry about the blank rows.

    We'll learn how to delete rows next.

5. Click in the first blank row you inserted. On the Tool Bar, click the **Delete Row** button.

    The row is deleted and all subsequent rows are scrolled up.

6. Use the **Delete Row** button to delete any other rows you have entered.

    The Insert Row and Delete Row functions are also available by pressing the F9 and F8 keys, respectively, and as options on the Edit menu. These functions are available for 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/Delete Row buttons, menu options and function keys will be disabled.

7. Stay on the **Performance** screen as we will be learning how to sort rows in this grid next.

8. Continue with the next tutorial.

Tutorial 3.2 – 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 Appraisals** screen by looking at the **Initiation Date** column.

    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.

    Sorting is almost always applicable for grids (it is disabled in a few cases) and is easy to perform.

2. Click on the header for the **Initiation Date** column.

    The rows are now sorted in ascending order.

3. Click on the header for the **Initiation Date** column again.

    The rows are now sorted in descending order again. As many times as you click, People-Trak will reverse the sort order.

4. To show that you can sort by any desired column, click on the **Items Rating** column to sort by that column. Click again to re-sort in the opposite order. You can try this with as many columns as you wish.

    Another way to sort rows in a grid is to use the Row Up and Row Down buttons.

5. Click on one of the rows in the bottom half of the grid. On the Tool Bar, click the **Row Up** button. That row will move up one row. Continue to click on the **Row Up** button to move that row all the way to the top.

    Once you reach the top, clicking the Row Up button does nothing.

6. Now, click the **Row Down** button several times, and the current row moves down.

    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 demonstrate this.

7. Sort the performance appraisals in some obvious order and then move to another screen. Now, return to the **Performance Appraisals** 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.

    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 order because users are too casual with their sorting. For example, you might have reports that are expecting the most recent information in the top row of a grid but someone sorted that grid in a completely different order. In this case, your report results will not be what you wanted. You can disable the grid sorting feature for a user in Security Setup.

Before we continue on with the next tutorial, let's close Donald's record without saving the changes we just made. Remember how to do that? The following step is a reminder.

8. Click the **X** in the upper right-hand corner of the primary screen (in the Standard-Employee bar), and then click **No** to not save the changes.

In future tutorials, when you are asked to close a record without saving the changes, that is what you will need to do.

9. Continue with the next tutorial.

Tutorial 3.3 – Undo 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.

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.

1. Open **Donald Stern's** record.

   The Personal screen is displayed.

2. Click in the **Country** field. On the **Edit** menu, select **Select All** or use the mouse to select the contents of the field.

3. On the **Edit** menu, select **Cut** or on the Tool Bar, click the **Cu**t button to cut (delete) the contents of the **Country** field.

   The Country field should end up blank.

4. Click in the **Address 1** field. On the **Edit** menu, select **Paste** or on the Tool Bar, click the **Paste** button to paste (insert) the text that was cut from the **Country** field into the **Address 1** field.

5. In the **Address 2** field, paste the contents of the **Country** field into that field as well.

   Now we have some changes with which to work.

   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.

6. Click in the blank **Country** field.

   Note that the Undo button on the Tool Bar becomes enabled. (If you position to an unchanged field, the button will be disabled.) Any field that has been changed, as indicated by the modified color, can be undone. Let's try a few.

7. Click the **Undo** button.

   The Country field, which 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 in this field.

8. Before you undo any other fields, select the the **Edit History** option on the **Audit** menu to display the **Edit History** log.

   Note that all of the changes you have made, except for the Country change that was undone, are listed in the order you made them.

9. Now close the **Edit History** screen and undo all of the other fields one after another. When there are no fields in the modified color, you are finished. Now view the **Edit History** log again. There should be no remaining changes because all of them have been undone.

The undo feature supports multiple undos for the same field.

10. To show how this works, change the **Country** field four or five times. Use whatever technique you want. View the **Edit History** log to verify that all of the changes to the field have been recorded. The **Old Value** and **New Value** columns should indicate the progress you made.

11. Now use the **Undo** button to undo the last change you made.

    Note that the color does not revert back to the unmodified state and that the Undo button remains enabled.

12. Now, undo each of the changes until you have restored the **Country** field to the original phrase.

    Now the color has been restored and the Undo button is disabled.

13. Continue with the next tutorial.

Tutorial 3.4 – Undo All Changes

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 made during the current session. 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 (**Status**, **Compensation**, etc.).

2. Make a couple changes on that screen.

3. Now return to the **Personal** screen.

   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 captured, but they are not yet saved. Thus, they can be undone.

4. Try the **Undo** on one of the fields you have changed.

   The Undo capability persists until you leave the current record. We have already seen how changes that are visible in the Edit History log can be undone using the Undo Field feature one field at a time. Now, let's learn how to undo all of the changes you just made.

5. On the **Edit** menu, select **Undo All**.

   The following message is displayed:

   Undo all changes made in this session?

6. Click **Yes**.

   All of the changes made since the last save are undone.

   Note: A change made to the ID field in a record is immediately saved upon entry, so it won't be undone.

7. Go to the other screen where you made changes.

   You will see that those changes are undone as well.

   Undo All 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 use Undo All.

8. To see how the **Undo All** feature works on grids, select the **Performance Appraisals** screen. Delete a few rows and then insert a few other blank rows. When you have the grid completely ruined, use the **Undo All** feature and see what happens.

   The grid is restored to its original state.

9. Return to the **Personal** screen and stay in **Donald's** record.

10. Continue with the next tutorial.

Notes

Lesson 4
Field Types and Popups

Lesson Contents

This lesson covers data entry in three different field types, which also have unique popup features.

Tutorials

Data Entry in a Table Supported Field: shows how data entry is performed on fields supported by both simple and complex tables.

Using the Date Popup: demonstrates the date popup feature, which can be used to select a date during data entry in a date field.

Data Entry in a Multi-Line Field: shows how the ENTER key moves from field to field. Then covers how to use the Multi-Line popup to do data entry in a multi-line field that requires the use of the ENTER key within the field.

Tutorial 4.1 – Data Entry in 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, you can avoid having a different version of an entry for every employee entered.

1. You should still be on the **Personal** screen of **Donald Stern's** record.

   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 in a field supported by a popup.

2. Press 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. Click in the **City** field.

   The City field is supported by the City table. The City table is normally a list of those cities in the general vicinity of your facility. The simplest way to complete a field supported by a table is to use the popup feature. Try it now.

4. 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 you are taken to the next field.

5. Click in the **City** field.

   Note that the Undo button is enabled. Selecting an entry from a table is just like keying, only faster.

   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.

6. In the **City** field, press **F3**.

   The popup will be displayed just as if you clicked on the button.

7. Click **Cancel** to not make a selection.

   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.

8. In the **City** field, enter **Vista** and press **ENTER**.

   The value is validated against the entries in the table and is accepted. Now let's try something else.

9. In the **City** field, enter **XXX** and press **ENTER**.

This is a bogus city, and one of the two messages shown below will be displayed when entering a value that is not in the table:

Entry is not in the table, Override Table? Yes/No

or

Entry is not in the table

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.

The City table is currently defined as optional, so you will see the first message.

10. Click **YES** or press **ENTER** 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.

    Here is one more method of entering data into a field supported by a table.

    Note: In the examples below, the letters being entered are always shown in capital letters. The entry itself does not have to be capitalized to work. Upper and lower case letters both work.

11. In the **City** field, enter **S** and press **ENTER**.

    All of the cities that start with "S" are displayed. If there weren't any cities that started with "S", People-Trak would have treated this entry like the "XXX" entry earlier, based on the usage defined for the table.

12. Select **San Diego**.

    You could have also gone directly to the "S" entries in the full table listing as well.

13. In the **City** field, clear the field and then click the popup button or press **F3**.

    The City table is displayed.

14. Press **S** and you will be taken to the first entry in the table that starts with **S**.

15. Press **C** and you will be taken to the first entry in the table that starts with **C**.

    You need to wait about two seconds between pressing the S and the C for the system to recognize that you are not trying to type multiple letters.

16. Press the letters **SAN** in quick succession and you will be taken to the first entry in the table that starts with **San**. Press **ENTER** to accept that entry, which happens to be sunny San Diego.

Our City table is not that big, but on tables that have many entries, this "search" feature in a table popup can be very helpful. This search feature is also available in the Select Field and Select Document popups as well.

There are dozens of tables just like the City table throughout People-Trak. The operating conventions are always the same.

Tables (and all popups) work on grid text boxes just like they do on regular text boxes. Let's try one.

17. Click the **Education** button on the right side of the screen.

The Education screen is displayed with the cursor in the Degree column of the first row of the grid.

This field is supported by the Degree table. Note that the table popup button appears adjacent to the field for the current row only.

18. Click the popup button or press the **F3** key and select from the table.

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.

The City table and the Degree 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, if table mapping is being used. Let's see how one of these works.

19. Close the **Education** screen and don't save your changes.

20. Select the **Training/ Competency** screen. In the training grid, click in the **Course Code** field in the first row. Click the **Details:1** button to display the course details for the first row. Close the subscreen.

21. In the **Course Code** field, click the popup button to display the Select **Training Course** table. Select a course that is different from the current one.

Multiple fields from the table are returned and added to the current record. Some are displayed on the training grid. Others are placed on the Course Details screen.

22. Check this by clicking the **Details:1** button. When finished, close the subscreen.

When the table selection was made, 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. Also note that the returned fields are display only because fields returned from table maps cannot be modified. Those values are determined by the corresponding table entry.

Note: If you determine that there are some fields that you do not want returned from a table map, you can update the map and display only settings with utilities. 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.

23. Continue with the next tutorial.

Tutorial 4.2 – Using the Date Popup

Date fields are notoriously difficult to enter. Fortunately, People-Trak has features that make date entry easier. As you saw in an earlier lesson, dashes were automatically inserted into dates as you keyed the digits to assist in the data entry and formatting process. People-Trak also 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. Select the **Personal** screen. Click in the **Birth Date** field.

    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.

    As with all popups, you can activate the popup by clicking the button or by pressing the F3 key.

2. Press **F3** this time to activate the popup.

    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 today's date. Check this now.

3. 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. Close the date popup. Now clear the **Birth Date** field. Activate the popup and note the month, day, and year reflect today's date. Click the **OK** button.

    Today's date is returned to the Birth Date field. 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.

    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 according to the contents of the date field from which the popup was selected. Now let's assume that you wish to set the date one year forward… quickly. What would you do? The fastest way to advance a given date one year requires three clicks of the mouse. Let's demonstrate this.

4. In the **Birth Date** field, click the date popup button. Click the right arrow button adjacent to the **Year** dropdown. Click the **OK** button to close the date popup and return the value to the **Birth Date** field.

    You do not even need to look at the month or day values. Just click, click, and click.

    The same technique can be used for advancing a given date one month.

5. In the **Birth Date** field, click the date popup button. Click the right arrow button adjacent to the **Month** dropdown. Click the **OK** button.

    Easy!

    Another way to get a date entered is using the Date Stamp feature. Whenever you start People-Trak the date stamp is set to today's date. You then have the ability using the Set Date Stamp option to set the date stamp to another date. When you are in a date field, you

can use that date stamp to enter the appropriate date. You will learn more about the Date Stamp feature in the Data Entry training.

You have now learned that you can "enter" data by typing in the data (remembering to clear any existing data first) or using the popup (when available) to select the data. So, when you see the phrase "enter" in training, it is your choice as to what method you use.

6. Continue with the next tutorial.

Tutorial 4.3 – Data Entry in a 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 with which to work. 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 used to insert a new line directly in the field, the following, equally-frustrating 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. You would grow very frustrated deleting the line and then having to remember 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. Select the **Wellness** button to display the **Medical/Wellness** sub 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 click in 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 the field and try again, but the results will be the same.

4. Click back in the **Restrictions** field. This time, click the multi-line popup button. A new text box appears. Now type your sentence and add lines and use the **ENTER** key as you please. Format the text the way you want. Now, click **OK** to close the popup and return the text to the underlying field.

    The text you have keyed should be echoed just as you keyed it in the popup.

5. 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. Click back in the **Restrictions** field, and click the popup button again.

    If you type more text than can be shown in the multi-line popup screen, the scroll bar will activate to allow you to keep typing away.

7. Keep pressing **ENTER** until you reach the bottom of the text area. Pressing ENTER one more time will activate the scroll bar.

8. Click **OK** to close the popup.

9. Close **Donald's** record, without saving.

10. Continue with the next tutorial.

Lesson 5
Getting Help

Lesson Contents

This lesson gives you a tour of all of the online help available with People-Trak.

Tutorials

Field Help: shows how to access field help.

Screen Help: demonstrates how to access screen help.

Help Topics: shows how to view the contents of the entire People-Trak documentation suite.

Support Online: tours People-Trak's online support website.

Tutorial 5.1 – Field Help

Field help is available at any field. Let's look at a field on the Enterprise Setup screen to see how this works.

1. On the **Setup** menu, select **Enterprise Setup**.

    The Enterprise Setup screen is displayed.

2. In the **Enterprise Name** field, press **F1**.

    The Field Name: Enterprise Name screen is displayed.

    On the top left hand side of the screen, you will see a pane where Overview is highlighted. In the viewing area of the screen note that there is an overview of the Enterprise Name field.

    In addition to an overview, field help provides information about the properties and attributes associated with the field as well as where the field is used.

3. Close the **Field Name: Enterprise Name** screen by selecting the **Close** or **X** button.

    Now for another way to look at field help.

4. On the **Tool Bar,** click the **Show Field Help** button.

    Once again the same help screen is displayed.

5. Close the **Field Name: Enterprise Name** screen.

6. Click in any other field on the **Enterprise Setup** screen and use one of the two methods to pull up field help for that field.

    Field help is displayed, except this time the information is for the field you chose.

7. Continue with the next tutorial.

Tutorial 5.2 – Screen Help

Screen help is available at any screen. Since we are already in Enterprise Setup, let's look at the screen help.

1. You should still be on the **Enterprise Setup** screen.

2. Press **SHIFT + F1**. (Hold down the **SHIFT** key while pressing the **F1** key.)

   The Screen Name: Enterprise Setup screen is displayed.

   On the top left hand side of the screen, you will see a pane where Overview is highlighted.

3. Click the "+" sign adjacent to **Overview** to expand the tree.

   An overview of the Enterprise Setup screen includes help articles about the screen itself, enterprise setup terminology, and an introduction to the concept of enterprise setup.

   Let's take a look at the Enterprise Setup Screen help.

4. Select **Enterprise Setup Screen** so that it is highlighted.

   The help text is displayed in the viewing area once the topic is selected. Read and scroll down and soak up the knowledge!

5. Click the "+" sign adjacent to **Screen Objects**.

   The tree view expands to show the different tabs found on the Enterprise Setup screen.

6. Click the "+" sign adjacent to **Settings Tab**

   The tree view expands to show the frames found on the Settings tab.

7. Click the "+" sign adjacent to **General Settings Frame**

   The tree view expands to show the fields found within the General Settings frame.

8. Select the **Email Server Address** field

   In the viewing area of the screen, we can read the help text for the Email Server Address field.

9. Close the **Screen Name: Desktop Setup** by selecting the **Close** or **X** button.

   There is one more way of accessing screen help.

10. On the **Tool Bar**, click the **Show Screen Help** button.

    Once again, the Screen Name: Enterprise Setup screen is displayed.

11. Close the **Screen Name: Enterprise Setup** screen.

12. Close the **Enterprise Setup** screen.

13. Continue with the next tutorial.

Tutorial 5.3 – Help Topics

Help topics are available on any screen by using the Help Topics option on the Help menu. The Help Topics option allows you to view the contents of the entire People-Trak documentation suite.

First, let's look at how to pull up help topics from a screen. You should still be in the Personal screen.

1. On the **Help** menu, select **Help Topics**.

   The Help Viewer screen opens up with the Contents tab displayed. When selected, Contents tab shows a preloaded list of reference documents with the first document highlighted. Documents are displayed in a three level tree view organized first by document, chapters, and sections in each chapter. Let's take a glance at the Administration guide using this tab.

2. Click the "+" sign adjacent to the **Administration** guide.

   As you can see, the tree has expanded to show the chapter headings for the Administration document. Notice that these same headings are also displayed in the area to the right. Now that we can see the chapters that this document contains, let's take a closer look at one of them.

3. Click the "+" sign adjacent to the **Enterprise Setup**.

   This time, the tree has expanded to show the section headings for the Enterprise Setup chapter. The display area now shows our selected chapter and the section headings as well.

4. Click the **Introduction to Enterprise Setup** section.

   The Introduction to Enterprise Setup article is displayed for you to read. Help articles are just clicks away!

   But say we forgot how to copy a table, and that's all we really want to read about. We don't have time to browse through different guides and chapters.This is a situation where we can utilize the Index tab.

5. Select the **Index** tab.

   Under the Index tab, contexts are listed alphabetically. Help articles can be viewed for a particular context by simply selecting it.

6. Scroll down through the list of contexts and select **Copying Tables**.

   The article is displayed in the right hand area of the screen for us to read and brush up on your table copying skills.

7. Select **Close** to close the **Help Topics** screen and return to the Organizer Desktop.

8. Select the **Setup** menu and look at the list of menu options.

   Module Setup has caught our eye and we want to learn more about it, but we don't know where to start. This is where the Search tab comes in handy.

9. Close the **Setup** menu.

10. On the **Help** menu, select **Help Topics**.

11. Select the **Search** tab.

    The Search tab article results are blank when the Help Viewer is first opened. In order to search articles, all you have to do is enter the desired phrase or text in the search box and select the Go button. All articles containing the phrase in the heading or article contents will be returned to the Search pane in list format.

    We want to search for all articles that contain the phrase Module Setup.

12. Enter the search phrase **Module Setup** and select the **Go** button.

    Immediately, the applicable articles are listed. The first article is highlighted and ready to read. Select another article in the list that you would like to read.

13. Select **Close** to close the **Help Topics** screen and return to the Organizer desktop.

    That's a quick tour of the Help Topics feature of People-Trak. All of the documentation available with People-Trak is at your fingertips. Be sure to use this wealth of information.

14. Continue with the next tutorial.

Tutorial 5.4 – Support Online

Online support is available on any screen by using the Support Online option on the Help menu. This option allows you to connect to the People-Trak customer support website.

Let's see what's available!

1. On the **Help** menu, select **Support Online**.

   Your browser opens and, as long as you are connected to the Internet, you are connected to the www.people-trak.com website and directed to Log In to Your People-Trak Account page.

   Once logged in, a user can view and update the account and company information, explore resources, view purchase history, submit support requests, and much more. Since User Names and Passwords are unique to the user, we won't be logging in for support at this time, so let's return to People-Trak.

2. If you are taking this class via WebEx, close the People-Trak tab on your web browser (leaving your WebEx tab still open) and press **ALT + TAB** to return to People-Trak. If you are not taking this class via WebEx, close your web browser, and you will be returned to People-Trak.

   There is one more Help menu option that we will take a quick peek at before we wrap up this lesson.

3. On the **Help** menu, select **Help About**.

   The Help About screen is displayed with information about our current training implementation of People-Trak including installation date, version, version date, number of records licensed, support expiration date, data file path and log file path. Other product options are also listed and their associated check boxes are displayed as selected when they have been licensed. In our case, we selected the Position Control and Attendance options for our training session, so you will see those options selected here also.

   The Help About screen will provide you with key information about your People-Trak implementation when you access it from your own system. Your Support Representative may ask you to reference this screen as needed.

4. Close the **Help About** screen.

5. Exit **People-Trak**.

6. This concludes this tutorial and lesson