

Basics Series-4009

Records and Lookup

Version 9.0

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Contents

Workbook	1
Lookup Screen	1
Match Types	2
Sorting a List of Records	2
Selecting a Record	2
Using the Basic Tab	3
Using the Custom Tab	4
Using the Favorites Tab	4
Using the Options Tab	5
Editing a Record Group	6
Record Locks	6
Opening an Existing Record	7
Navigating Records	7
Adding a New Record	8
Mandatory ID	9
Auto-Numbering	9
Saving a Record	10
Closing a Record	10
Deleting a Record	10
Copying a Record	10
Transferring Records to Another Company	11
Running Documents	11
Sending Email	11
Lookup for Audit/Transaction History	11
Lookup for Output to Email	12
Lesson 1 Record Selection and Navigation	13
Tutorial 1.1 – Selecting Records	14
Tutorial 1.2 – Navigating Records	17
Tutorial 1.3 – Edit a Record Group	19
Lesson 2 Working with Records	21
Tutorial 2.1 – Add a Record	22
Tutorial 2.2 – Transfer a Record	24
Tutorial 2.3 – Delete a Record	26
Tutorial 2.4 – Copy a Record	27
Tutorial 2.5 – Using a Record Template	29
Tutorial 2.6 – View History for a Record	31

Notes

Workbook

Lookup Screen

People-Trak provides a powerful lookup feature to allow you to select the records with which you wish to work. The lookup feature is used whenever you need to select records for processing. For example, the lookup is used to select records for editing and for use in batch processing processes. Regardless of where or how the lookup feature is activated, it always works the same way. When the feature is activated, the Lookup screen is displayed, which has five tabs to specify what records should be selected.

Basic Tab

The Basic tab is used to perform simple lookups using one of four pre-defined fields. On text fields, you can enter a full or partial value and lookup will find all records with a value in the field that starts with what you entered. On non-text fields, you can enter a value and lookup will find all records with a value in the field that equals what you entered. The four fields listed can be changed to any of the fields in the module. For example, if you wish to include department code as one of the fields, you can add it in place of one of the other fields. Or if you wish to change the order of the fields, you can do so.

Custom Tab

The Custom tab is used to look up records when you do not know an applicable value for one of the fields on the Basic tab, or when you wish to create a specific query based on a single field. The simple query that you create is not saved. As soon as a record is selected, the query is discarded.

Advanced Tab

The Advanced tab is used to look up records when you wish to specify multiple query equations and/or generate complex queries. The Advanced tab uses the standard query grid. The query is not saved, however. As soon as a record is selected, the query is discarded.

Favorites Tab

If you use the Advanced tab, you may find that you are continually using the same set of equations to generate a lookup. Rather than keying the equation set over and over again, you can create a Lookup document containing a query. This document will then become one of your favorites and can be selected from this tab at any time.

Options Tab

The Options tab is used to specify the options to be used when performing the lookup. You can choose to span companies during the lookup and/or return only one record rather than a group of records. Spanning is only available to Administrators.

Note: If you continually use span companies on search or single record on select, you can set the lookup defaults for these in Module Setup. Spanning is turned off for non administrative users and therefore cannot be turned on in lookup for these users, even if the default is set to span.

Match Types

Single-Record Match

When you perform a lookup and the lookup finds/identifies a single match, the Lookup screen is closed and the record is returned. If you are editing records, the first screen for the particular module is displayed with the information for the matching record. If you are in a batch processing process, the pertinent information for the batch is added for the record selected.

Multi-Record Match

If the lookup returns more than one match, all of the matching records are listed including those that might be locked by other users. Note that the sort order for the records and the number of records selected are displayed in the status bar at the bottom of the screen.

The fields listed in the selection grid are the same four fields listed on the Basic tab. If you change any of the four lookup fields or change the order in which they appear, the fields on the selection grid are changed to match.

Sorting a List of Records

If you used the Basic tab to perform the lookup, the list of matching records is initially sorted according to the field used to perform the lookup. For example, if you used Employee ID for the search, the records are sorted by ID. If you used Last Name for the search, the records are sorted by last name. If you used one of the other tabs, the records are always sorted by the first field on the Basic tab.

The listed records can be sorted by any of the fields listed in the grid header by clicking on the grid header for that field. If you click on the first column, the records are sorted according to the field associated with the first column. If you click on the second column, the records are sorted according to the field associated with the second column.

The order in which the records are sorted determines the order in which the records are listed in the Record dropdown on the Navigation Bar. Thus, if you wish to have your record group presented in a particular order, sort the records appropriately before selecting a record.

Selecting a Record

When records have been listed on the Lookup screen, you can select the record in the group that you wish to edit by highlighting the desired record and clicking the OK button or by double-clicking the row. If you selected the One Record check box in the Options tab of the Lookup screen, only the one record you selected is returned, otherwise the record group is returned. If you are editing records, the first screen for the current module is displayed with the information from the selected record. The Record dropdown will indicate the record ID and record description field (example: Full Name in Personnel Management), and the record counter will indicate the position of the current record in the group. For example, if after sorting a group of 10 records, you select record 3, the record counter will indicate “3 of 10” if the group was returned or “1 of 1” if you chose to only return the one record. If you are using a batch processing process, a line is added with the pertinent information for each record or just the one if only returning one record.

Record Locks when Selecting a Record

If you select a locked record, the “record locked” message is displayed and you can only select the record for display-only use. If you select a record that is not locked, but there are

other locked records in the selection, the record is allowed and all records are returned to the Record dropdown. Any locked records will be checked if and when that record is made the current record.

Using the Basic Tab

The Basic tab is used to perform simple lookups. To look up records using one of the labeled fields on the screen, enter a full value (or partial value on text fields) and press the ENTER key or click the Search button. On text fields, the search will perform a query and return all records with a value in the field that starts with the value entered. For example, if you enter the value “S” into a Last Name field on the screen, all employees whose last name starts with “S” are selected and displayed. In addition, the records are sorted by last name. On non-text fields (i.e. date, time, numeric), the search will perform a query and return all records with a value in the field that equals the value entered. For example, you must enter a full date into a date field in order for a match to be found. You cannot enter 10 for the month of October and find all dates that start with 10. If you need to do a partial search of non-text fields, use the Custom tab, which allows you to use a wide-range of operators to perform the query.

The entries in this tab are NOT cumulative. You cannot enter a value in each field and assume that a more complex query will be performed. The lookup engine checks for the first non-blank field and then uses the entry in that field for the lookup. It does not matter if you have made entries in subsequent fields, or if the cursor is positioned to a different field when the Search button is clicked.

Note: You can click the Search button when the cursor is positioned to one of the lookup fields, even if no entry has been made. The lookup will return all records in the company sorted by the field used to make the selection or by the first field if a value was not entered in any fields. If you have

How to Change the Lookup Fields

The fields used to perform lookups on the Basic tab are pre-defined for each module, but can be changed. The lookup fields are applicable to all users. The General tab within Module Setup can be used to select the fields that are to be used for lookup and duplicate checking in the current module as well as the default source for creating a record.

Note: The Lookup fields are the same fields displayed in the grid when multiple matches are found. Make certain that the fields you use are sufficient to properly identify the records you wish to find.

Lookup Limits

The Lookup Limit field within User Setup is used to define the number of records to show when a lookup is run. The default setting for this field is 0, which means that all qualifying records are to be shown. Changing this setting is only required if you have a very large number of records in the database, which would increase the time taken for a lookup. If you do choose a value for the Lookup Limit that is then less than the number of qualifying records in a lookup, the lookup results will state that the assigned record limit has been enforced.

Note: If you do not choose a value for the Lookup Limit and the number of qualifying records is greater than 5000, a Lookup Limit of 5000 is automatically enforced.

Using the Custom Tab

The Custom tab is used to look up records when you do not know an applicable value for one of the fields on the Basic tab, or when you wish to create a specific query based on a single field. You can use this tab to create a simple user-defined query using the field name for the field you know and the value that you have. When the Custom tab is selected, the screen shown below is displayed.

Queries are formed from three components: a field name, an operator, and a comparison value. Together, the three components form an equation of the following format.

Field Name Operator Contents

Simple Query Examples

To select those employees that are female, enter the query shown below, with Gender as the Field Name, = as the Operator, and Female as the Contents.

Gender = Female

When this lookup query is performed, the value of the Gender field for each record will be compared to the value "Female". If the Gender field contains "Female" the record is included in the lookup.

To select those employees who are greater than 50 years of age, enter the query shown below.

Age > 50

When this lookup query is performed, the value of the Age field for each record will be compared to the value "50". If the Age field contains a value greater than 50, the record is included in the lookup.

To select those employees with a pay rate less than or equal to \$50,000, enter the query shown below.

Pay Rate <= 50000

When this lookup query is performed, the value of the latest Pay Rate field for each record will be compared to the value "50000". If the Pay Rate field contains a value less than or equal to 50,000, the record is included in the lookup.

Secondary Lookup

A secondary lookup into another module is available. For example, if you are in Safety Management and want to find an incident involving a certain employee but you are not sure of the Employee ID, you can do the following on the Custom tab of the Lookup screen:

Using the Favorites Tab

If you use the Advanced tab, you may find that you are continually using the same set of equations to generate a lookup. Rather than keying the equation set over and over again, you can create a Lookup document containing a query. This document will then become one of your favorites and will appear on the Favorites tab whenever the tab is displayed. You can then use that favorite to look up records anytime you like. If a favorite grows obsolete, you can delete the favorite using the Explorer. When the Favorites tab is selected, the screen shown below is displayed.

Note: If you find that you are using a lookup favorite more frequently than others, you can assign that lookup favorite to the lookup Quick Search button through User Setup.

Creating and Saving a Favorite

Lookup favorites are a unique type of document. They can be created using the Lookup Favorites option on the Documents menu and saved with a meaningful name. The meaningful name is displayed in the list box on the Favorites tab.

Lookup by Favorite

To use a Lookup Favorite in Lookup, start on the Favorites tab and highlight the desired favorite. Once Search has been selected, the query associated with the favorite will be executed and the list of matching records will be displayed. You may work with the records just as if they were selected by any other method.

Using a Favorite for an Adhoc Lookup

When a favorite is executed, the query equations from the Lookup document are moved into the grid on the Advanced tab. (You do not normally see these because you are positioned to the Favorites tab.) If you wish to make an adhoc change to the query and to select records again, you can do so.

Once you select a record, the adhoc changes made on the Advanced tab are discarded. They are not updated to the Lookup Favorite document itself. To permanently modify the Lookup Favorite document, use the Lookup Favorites option on the Documents menu.

Using the Options Tab

The Options tab is used to span companies when looking up records and to specify if only the highlighted record in the search results should be opened. When the Options tab is selected, the following fields are displayed:

Span Companies on Search

Allows you to specify whether or not the current lookup should span companies. Select the check box to span companies. Clear the check box to not span companies, which only shows records from the current company. This check box is defaulted to cleared whenever a new lookup is started. If spanning is done, a Company column is included in the search results. If you prefer to have the Lookup in a module defaulted to Span Companies on Search, you can specify these settings in Module Setup. Spanning is turned off for non administrative users and therefore cannot be turned on in lookup for these users, even if the default is set to span.

Note: When spanning, if you select a record from the search results that is from another company, you are asked if you want to switch to that other company. If you say “Yes”, you are automatically switched to the other company and the records from the other company (or just the one record if Single Record is selected) that were in the current search are opened as the current record group with the selected record active. This is necessary because you cannot edit a record from company B while in company A. The same is true if you are spanning and select a record from the search results that is from the current company. Only the qualifying records in the current company are opened as a group (or just the one record if Single Record is selected).

Single Record on Select

Allows you to specify whether or not current lookup should only open the highlighted record in the search results. Select the check box to only open the highlighted record in the search results. Clear the check box to open all records in the search results. This check box is

defaulted to cleared whenever a new lookup is started. If you prefer to have the Lookup in a module defaulted to Single Record on Select, you can specify these settings in Module Setup.

Editing a Record Group

The group of records returned from a lookup can be acted upon as a group in the following ways.

- Transfer a group of records from one company to another
- Print letters, labels or other documents for the group of records
- Email a message to each member of the group.

It is also possible to remove records from the group (this does not delete them from the company) so that you can create the precise group you wish to work with. You can edit a record group using the Edit Lookup option on the File menu.

The Edit Lookup screen contains a list of the same records contained in the Record dropdown. The list can be modified in two ways. You can click on each record you wish to keep and then click the Include button, or you can click on those records you wish to remove and then click the Exclude button. You can use the Include feature or the Exclude feature continually until the list of records matches the list you wish to use. When you click Save, you are returned to the workflow with the record group you indicated. You can then transfer the group, print documents for the group, or send email.

If there are changes in progress in the current record, you must save those changes first before using Edit Lookup

Record Locks

People-Trak uses record locks in a multi-user environment. When a record is opened (the current record in a group or any single record selected), a lock is assigned to that record. The lock is the user name. The record locked cannot be opened for editing by any other user until the record is closed. A record is closed when the entire record group is closed or when another record becomes the current record. The record can be opened in display-only mode, however. If a user named "JJONES" attempts to open a record that is locked by "JSMITH", the following message is displayed:

Record in use by "JSMITH"
Would you like to open in "display-only mode"?

If you choose to open the locked record, you can navigate through the screens and view any available information. However, you cannot edit any field, or use popups anywhere within the available screens.

Here are some additional record lock rules:

- You can copy a locked record.
- You cannot delete a locked record.
- You cannot transfer a locked record.
- You can print letters and labels for locked records.
- You can send an email to a locked record, but the email cannot generate notes and attachments.

Opening an Existing Record

Records can be opened for viewing and editing in any module using the same basic technique. To start the process, you can click the Open button on the Tool Bar or select the Open option on the File menu. The Open option starts the Lookup screen. The Lookup screen is used to specify the criteria for the record or records to be looked up. If the lookup generates a single match, the information for the record is shown on the first screen in the module. If the lookup generates multiple matches, the Record dropdown is also populated with all the records in the match.

If a record or group of records is open when you select the Open option, that record or group of records will be saved and closed and then the Lookup screen will be displayed.

Navigating Records

Once a group of records has been returned for editing, you may navigate the list using the features of the Navigation Bar.

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.

Navigation and Record Locks

In a multi-user environment, all navigation is subject to the record locking rules. If you are navigating through records using any of the available methods and the next record to be displayed is locked, you will encounter the “record locked” message and you will be limited to viewing that record in display-only mode.

Adding a New Record

A record can be added to any module using the same procedure. To start the process of adding a record, you can click the *New Record* icon on the Shortcut Bar, select the *New Record* option on the File menu, or click the *New Record* button on the Tool Bar. You can add a new record with or without a record group already open. If a record group is open, the new record is added to the end of the group and becomes the active record ready for editing.

Create Record Screen

When the *New Record* option is selected, a *Create Record* screen is displayed. All modules will have the Source frame, which includes source fields. Some modules also have a Details frame, which includes detail fields as they pertain to that module. Valid record sources vary by module, but all modules have Copy and Template. All of the valid sources are listed below, with notation of the module to which they are unique.

Copy

Copies the record specified in the Source ID field to create the new record.

Scratch

Creates the new record from scratch. Available in all modules except Training Administration and COBRA.

Template

Copies the template record specified in the Source ID field to create the new record. All of the data in the record template is automatically added to the new record for you, saving you a lot of data entry time

Applicant

Copies the applicant record specified in the Source ID field to create the new record. Only available in the Personnel Management module.

Employee

Copies the employee record specified in the Source ID field to create the new record. Only available in the COBRA and Applicant Management module.

Training Course

Copies the training course record specified in the Source ID field to create the new record. Only available in the Training Administration module.

Job Table

Copies the job code specified in the Source ID field to create the new record. Only available in the Position Control and Requisition Tracking modules.

Position

Copies the position record specified in the Source ID field to create the new record. Only available in the Requisition Tracking module.

Mandatory ID

By default, there is a single mandatory 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 as described below, the IDs that are generated will always be unique because they are checked before they are assigned.

Auto-Numbering

Normally when a new record is created, you will be required to provide a unique ID for the record. The unique ID field has a different name in each module, but it performs the same function. People-Trak provides a powerful Auto-Numbering feature that can be used to automatically assign the next available number when you first create the record. Auto-Numbering is useful when employees are assigned sequential numbers as they are hired or when applicants are entered.

The Auto-Numbering feature can be activated for any module at any time. Each company within the module can have its own starting number. The starting number can be restarted if desired. One of the powerful features provided by People-Trak is the prefix and suffix features. The automatically generated number can be embedded into a more complex numbering scheme that uses values both before and/or after the number itself.

For example, some companies use an automatic numbering scheme for applicants that include the year as part of the number. You can simply assign the prefix “2007-” and all numbers will take the format: 2007-1, 2007-2, 2007-3, etc. In a similar way, you can assign a suffix. The suffix comes after the number. For example, to use the year, you would use the suffix “-2007”. All new numbers will take the format 1-2007, 2-2007, 3-2007, etc. Finally, you can actually assign both a prefix and a suffix. This might be useful when you wish to have the prefix represent a value such as a division code and have the suffix represent a year or some other value. For example, to use a division code for the prefix, you would use “001-” and to use a year for the suffix, you would use “-2007”. All new numbers will then take the format 001-1-2007, 001-2-2007, 001-3-2007, etc.

Note: If you choose to use a prefix and a suffix, you may need to consider increasing the length of the applicable ID field. You can change the length of any field using the Field Customization feature.

How Auto-Numbers are Assigned

The Company Setup process is used to assign, maintain, and view the next available number for each company (within each module). When a new record is created, an attempt is made to assign the next available number. If the next available number has actually been used, it is not used because this would create a duplicate. Instead, the next sequential number is checked and then the next. When an available number is found, the number is used to create a new ID and the next available number is set to one higher than the number just used. This process is repeated whenever a new record is created.

Because the Auto-Numbering feature confirms the next available number, it is possible to reuse the numbers from deleted or transferred records. You need only reset the starting number to the desired starting point. The first time that you create a new record, the search for an available number will begin. If a number has become available because a record was

deleted or transferred, the number will be available and will be assigned. The next time a new record is created, the next available number will be used even if it is much higher in the numeric sequence. Please note that there will be slight delay if many hundreds of numbers must be checked.

The Auto-Numbering feature is best activated when data entry for a given company is started. However, if you wish to activate Auto-Numbering after records have been added, you can simply set the next available number to be the next number you would have assigned manually. If the existing records did not use sequential numbers for IDs, you can either renumber them or you can allow the Auto-Numbering feature to skip those numbers when they are reached.

Saving a Record

The current record including any changes in process can be saved at any time using the Save option on the File menu or the Save button on the Tool Bar. The Save option commits any changes to the database, clears the Edit History Log and all changes are shown in the unmodified color. Using the Save option is like closing and re-opening the record.

Closing a Record

If you are editing a record, you can close and save the record using the Close option on the File menu or the Close button on the Tool Bar. The Close option closes the current record or group of records and returns you to the desktop.

Deleting a Record

Deleting a record is a very simple process. You need only select the record and then use the Delete option on the File menu. The prompt shown below is displayed.

Delete this record?

This prompt allows you to verify that the record displayed is indeed the one you wish to delete. As the deletion of a record is not undoable, you should make sure before you click the OK button. If the record is not the one desired, click the Cancel button.

Deleting the only record in a group causes the group to close. Deleting a record in a group of records causes the next record in the group to be displayed. If the record being deleted is the highest numbered record in the group (the last record, but not the only record), the first record in the group is displayed.

Note: Records are not normally explicitly deleted on a regular basis. Deleting records is normally reserved for some type of mistake. Records are normally transferred from an Active company to some type of Archive company where they remain indefinitely. You cannot delete a locked record or a record that has changes that have not been saved.

Copying a Record

Copying a record is a very simple process. You need only select the record and then use the Copy option on the File menu or the Copy button on the Tool Bar. The prompt shown below is displayed.

Copy this record?

This prompt allows you to verify that the record displayed is indeed the one you wish to copy. If the record is not the one desired, click the Cancel button to abandon the process. Otherwise, click OK to copy the record. A new record is created as a copy of the original record and placed at the end of the current group. The only field that is not copied is the unique ID field. Obviously, if the ID was copied, it would no longer be unique. You must specify an ID before the record can be saved.

Note: You cannot copy a record that has changes that have not been saved.

Transferring Records to Another Company

The Transfer option is used to transfer a record or a group of records from the current company to another company. This step is normally performed when archiving records from the ACTIVE database to the ARCHIVE database.

Transferring the only record in a group causes the group to close. Transferring a record in a group of records causes the next record in the group to be displayed. If the record being transferred is the highest numbered record in the group (the last record, but not the only record), the first record in the group is displayed.

Note: You cannot transfer a locked record or a record that has changes that have not been saved.

Running Documents

When a record or group of records has been selected, you can use the Documents option on the File menu or the Documents button on the Tool Bar to run any existing documents for the current record or for the entire group.

Sending Email

When a record or group of records has been selected, you can select the Send Email option on the File menu or click the Send Email button on the Tool Bar to email a message to a record or a group of records. After the record or group option has been selected, the screen shown below is displayed.

If you are sending email to a single record, the To field will contain the email address of the current record. If you are sending email to a group of records, the To field will contain the email addresses of the records in the group.

You can complete the email by filling in the other fields on the screen. You can also send the email message and the attachment to the notes for each of the records specified.

Note: If you are in a module whose key record does not have an email address associated with it, the Send Email option on the File menu and the Send Email button on the Tool Bar will be disabled. For example, if you are in the Training Course module, the key record is the training course, which of course is not a person that can receive an email.

Lookup for Audit/Transaction History

The By Record field on both the View Audit History Tab and View Transaction History Tab is supported by the Lookup Employee process.

Lookup for Output to Email

The Email tab is used to specify the email addresses and/or favorite lookup to be used when emailing the document. When the Output to Email option is used within the Document Viewer for this document, the Send Email screen To field is automatically filled in with the distribution list defined and/or the results of the lookup.

Note: The Email tab is not available for an Export or Lookup Favorite document as there is no document actually produced.

Lesson 1

Record Selection and Navigation

Lesson Contents

Tutorial 1.1 – Selecting Records	14
Tutorial 1.2 – Navigating Records	17
Tutorial 1.3 – Edit a Record Group	19

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

Tutorials

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

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

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

Tutorial 1.1 – Selecting Records

In the Intro to PT course, you used the Lookup feature to select Donald Stern for the purpose of demonstrating other features in People-Trak. However, we performed the Lookup in the simplest manner and did not take advantage of a wide range of features. Let's start using this feature more effectively now.

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

The Select Product Option screen is displayed.

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

The Login screen is displayed.

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

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

Let's learn more about the Lookup feature.

6. On the **File** menu, select **Open Employee** or on the Shortcut Bar, click **Open Employee**.

The Lookup Employee screen is displayed because we are in the Personnel Management module and are looking up Employee records. The Lookup screen for each of the modules all behave the same, you are just looking up different record types. The Lookup screen provides five individual tabs for selecting records. The focus of this lesson will be the first tab, Basic. You will learn more about the other tabs later.

The Basic tab first provides up to four separate fields that can be used to look up records. The actual fields can be defined by your organization. It is normally assumed that one of these fields is the ID (employee, application, position, etc.) and one is the Name (employee or applicant last name, description, title, etc.). When the Lookup screen is displayed, the cursor is always positioned to the first field, which we will assume is the Employee ID field in the Personnel Management module. We will now attempt to select one of the existing demonstration employees for processing.

7. In the **Employee ID** field, enter **1060** and press **ENTER**.

The following message is displayed:

No matching records

Why? The reason for this error is that you entered an incorrect employee ID, but it is not your fault. You were given an incorrect employee ID to demonstrate an important point. When selecting an existing employee, the employee ID entered must match an existing employee ID. If it does not, the program cannot retrieve the desired employee and the message shown above is displayed. When you see this message in the future, do not fear

that the desired employee has disappeared. In most cases, the message appears because the ID has not been entered correctly.

8. Press **ENTER** to clear the message.
9. In the **Employee ID** field, enter **1006** and press **ENTER**.

The Personal screen for Donald Stern is displayed. You did not see a list of employees as you have in the past because you entered a direct match. There is only one record with the ID 1006 and when there is a direct match, People-Trak moves directly to that record.

You can provide sufficient information for a direct match at any of the fields shown on the Basic tab. If you provide a unique last name, that record will be fetched. If you provide a name that is not unique, you will see a list of employees that share that name and you can select the particular record that you want.

Now let's learn how to use the "partial entry" method. First, we need to close the record we have selected. You can do this using the Close Employee or Exit option on the File menu, the Close Employee button on the Tool Bar, or the X in the upper right-hand corner of the Personal screen. So many options, so little time. Still another method, which will save a little work, is to directly select the Open Employee option. The Close Employee operation is assumed and you will proceed directly to the Lookup screen. If you have changes in process, they are saved. This time, let's do the following step to close the record.

10. On the **File** menu, select **Open Employee** or on the Tool Bar, click the **Open Employee** button.

Donald's record is closed and the Lookup Employee screen is displayed.

11. In the **Employee ID** field, enter the single digit **1** and press **ENTER**.

A list of those employees with ID numbers starting with 1 is displayed. On text fields, such as Employee ID, you can enter a full or partial value and lookup will find all records with a value in the field that starts with what you entered. On non-text fields (i.e. date, time, numeric), you can enter a value and lookup will find all records with a value in the field that equals what you entered. For example, you must enter a full date into a date field in order for a match to be found. You cannot enter 10 for the month of October and find all dates that start with 10. If you need to do a partial search of non-text fields, use the Custom tab, which allows you to use a wide-range of operators to perform the query. You will learn about the Custom tab in the Query and Reporting training class.

Now, let's find out how to select an employee from the list. You can select the desired employee in three ways. You can double-click on the desired employee, you can position the highlight over the desired employee and press ENTER, or you can position the highlight over the desired employee and click OK. Finally, if you wish to abandon the selection process, you can click Cancel.

12. Let's select **Donald Stern** using the double-click method.

The information for Donald Stern is displayed just as it was before. Now let's learn how to show a list of all employees in the database.

13. On the Tool Bar, click the **Open Employee** button to clear the information for **Donald Stern** and move directly to the **Lookup Employee** screen.

14. This time, perform a partial lookup using **S** in the **Last Name** field.

You will see a list of those employees who have a last name starting with S.

15. Do not select an employee this time. Instead, click **Clear** to clear the entries so that we can try something else.

16. Click **Search** to select all employees.

When the list is displayed, note that the headings for the list are the same fields listed for selection. As mentioned before, up to four fields can be used for flexible lookup and to enable you to identify the appropriate records. If you happen to have dozens of employees named Smith and you cannot remember hundreds of individual employee ID numbers, the fields in the list assist you in determining just which Smith you wish to select.

The list of records can also be sorted. To sort the list, click on the column header for the appropriate field. Try it.

17. Sort the list by **Last Name** and then by each of the other fields.

If you click on a header more than once, the sort order will alternate between ascending and descending. This feature can assist you in selection and in record navigation, which we will discuss next.

18. Continue with the next tutorial.

Tutorial 1.2 – Navigating Records

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

You should still be in the Lookup Employee screen with a list of all employees.

1. Before selecting a record, sort the list in ascending (**A to Z**) order by **Last Name** by clicking on the field heading. Then select **Donald Stern**.

Now let's evaluate what we have. The name displayed in the Record dropdown (on the far left side of the Navigation Bar) should be Donald Stern, but there are other records in the dropdown. This is clearly indicated by the record counter (between the blue arrows) that shows what number Donald is with respect to the total number of records displayed.

2. Let's verify this by clicking on the **Record** dropdown and scrolling through the list of names. Select **Frank Adams** and see what happens.

The current record changes to Frank Adams and the record counter changes to reflect Frank's position in the list.

3. Use this technique to return to **Donald Stern**.

The Record dropdown can be used to select any record that has been returned from the Lookup process. The record ID and description are displayed. In an employee record, the description is the full name backward. The records are ordered in the dropdown according to the manner in which they were sorted in the Lookup. You will recall that we sorted by last name in ascending order.

While the Record dropdown is used to select a specific record by name, the four blue buttons adjacent to the Record dropdown are used to move through the list incrementally.

4. Using the mouse, position the cursor over each of the four blue buttons and right click to see the name associated with each button.

The leftmost button is the First button. It will select the first record in the list as the current record.

5. Click the **First** button.

If your dropdown is still sorted by last name, the current record will become Frank Adams and the record counter will indicate 1 of 32, or something similar.

The rightmost blue button is the Last button. It will select the last record in the list as the current record.

6. Click the **Last** button.

The current record should become Gregory Wilson, with the record number indicating he was the last in the group.

The inner buttons are used to select the previous and next records in the list. Let's try these and see how they work.

7. Click the **Next** button.

Since you were positioned to the last record, clicking the Next button cycled you around to the first record.

8. Now click the **Previous** button to cycle back around to the last record.

You can also use key sequences to do the next record and previous record functions.

9. Press **CTRL + PAGE DOWN** (hold down the **CTRL** key and press the **PAGE DOWN** key).

The next record is displayed.

10. Press **CTRL + PAGE UP** (hold down the **CTRL** key and press the **PAGE UP** key).

The previous record is displayed.

Record navigation is frequently used in a process known as “browsing”. From time to time, you may find the need to browse through a group of records to check a specific field or make relative comparisons. Browsing is an easy way to do that.

11. Select the first record in the current list by clicking the **First** button.

12. Use the **Screen** dropdown on the **Category Bar** to select the **Compensation** screen.

Let's assume that you wish to “browse” salary history for this group.

13. Review the first record and then click the **Next** record button to see the next record. Review the second record and then the third. Continue browsing until you have seen what you wanted to see or you have returned to record **1**.

You can use this technique for any primary data entry screen and most data entry sub screens.

14. Continue with the next tutorial.

Tutorial 1.3 – Edit a Record Group

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

1. On the Tool Bar, click the **Open Employee** button.
2. On the **Lookup Employee** screen, click **Search**, which returns a list of all employees sorted in ascending order by **Employee ID**. Click **OK**.

Now let's assume that we wish to print labels for this group, but that three of the employees are terminated and you do not need labels for them.

3. On the **File** menu, select **Edit Lookup**.

The Edit Lookup screen provides a list of the current members in the order in which they are listed in the Record dropdown. Let's exclude the three members who are not to receive labels.

4. Locate **Donald Stern** and select the check box adjacent to his name. Do the same for **Frank Adams**, and **Penny Armstrong**.
5. Click **Exclude**.

What happens? The list is reduced from the original number by three members, and Donald, Frank, and Penny have been deleted.

6. Click **Save**, which will save your changes and close the **Edit Lookup** screen.

You are returned to the workflow with your new record group. Three from the original number are excluded, reducing the record counter, and the actual members in the Record dropdown are changed to reflect the exclusions. Your new group works exactly as if you had selected these employees in your initial lookup. If you realize that you need to exclude more members, simply use the Edit Lookup screen to exclude them. Conversely, if you only want a few of the records from the list, simply use the screen to include only those that you need.

Once you have adjusted your list of employees to the precise list you desire, you can perform whichever group-related function you wish. Only the current members of the group will be affected. Let's try one more thing.

7. On the **File** menu, select **Edit Lookup**.
8. This time, select any five employees, but be sure to not select the employee currently listed in the **Record** dropdown.
9. Click **Include**.

The list is adjusted to include only those five employees.

10. Click **Save** and see what happens this time.

Of course, the group is adjusted and the record count is modified, but what happens to the current record that is no longer in the group? You can check this yourself, but what happens is that the next available member of the group is selected for you. If you were on the last member of the group, the first member would be selected.

Note: If there are changes in progress in the current record, you must save those changes first before using Edit Lookup.

Remember how to close a record group? You have several alternatives as stated earlier in this lesson. You can close a record group using the Close Employee or Exit option on the File menu, the Close Employee button on the Tool Bar, or the X in the upper right-hand corner of the current screen.

11. Close your record group using whatever method you choose.
12. This concludes this tutorial and lesson.

Lesson 2

Working with Records

Lesson Contents

Tutorial 2.1 – Add a Record	22
Tutorial 2.2 – Transfer a Record	24
Tutorial 2.3 – Delete a Record	26
Tutorial 2.4 – Copy a Record	27
Tutorial 2.5 – Using a Record Template	29
Tutorial 2.6 – View History for a Record	31

This lesson covers how to add, transfer, delete and copy records. It also covers how to use a record template and view history for a record.

Tutorials

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

Transfer a Record: demonstrates the technique for transferring a record from one company to another.

Delete a Record: shows how to delete a record.

Copy a Record: demonstrates how to copy a record.

Use a Record Template: shows how to use a record template to create a new record.

View History for a Record: demonstrates how to view the edit and transaction history for a record.

Tutorial 2.1 – Add a Record

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

There are three ways to start a new employee record. You can use the New Employee option on the File menu, the New Employee button on the Tool Bar (when records are open), or the New Employee shortcut on the Shortcut Bar (when records are not open). Let's use the shortcut this time.

1. On the Shortcut Bar, click **New Employee**.

The Create Employee screen is displayed with the Employee Source field set to Scratch. Let's see what other sources are available.

2. In the **Employee Source** field, click the popup button.

The Select Employee Source screen is displayed. Every module has the Copy and Template options. All modules except Training Administration and COBRA also have the Scratch option. Each module might also have options that are module specific. In the case of the Personnel Management module, there is an Applicant source, which allows you to create a new employee record from applicant information. In this tutorial, we will create an employee record from scratch. We will learn about the Copy and Template options later in this lesson.

3. Click **OK** to select the **Scratch** option.

You are returned to the Create Employee screen. Unless instructed differently, whenever you are asked to create a new employee, simply click the Create button when you see this screen.

4. Click **Create** to create a new employee from scratch.

When the Personal screen is displayed, the cursor is positioned to the Employee ID field, which has a value of NEW1. If NEW1 had already existed, this value would be NEW2 and so on.

5. In the **Employee ID** field, replace **NEW1** with **1006**.

The following message is displayed when you attempt to leave the field:

Duplicate ID

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

6. Click **OK** or press **ENTER** to clear the message.
7. Now enter an available employee number such as **2006**.

This value will be accepted.

8. Enter a few other fields and note that the fields are shown in the modified color.

If you return to one of the fields, you will see that the field can be changed just as if an existing record were being modified. This is true because an existing record is being modified; it just happens to be a blank existing record. You are changing blank data to new data. If you undo any of the changes, the field will return to its original state, which is blank.

9. On the Tool Bar, click the **Close Employee** button to close the record.

The new record is now saved and has become part of the Active company in the training database. Do not worry; we will delete the record in a subsequent tutorial.

You can also add a new employee when you have a record group open for editing. Let's see how this works.

10. On the Shortcut Bar, click **Open Employee** and then click **Search** and **OK**.

All employees are opened as a record group for editing. Note how many employees have been returned by looking at the Record Counter in the Navigation Bar.

11. On the Tool Bar, click the **New Employee** button to start a new record.

You are returned to the Create Employee screen.

12. Click **Create** to create a new employee from scratch.

A record with an Employee ID of NEW1 is created.

Let's finish this record by showing what happens if you save a record without changing the ID.

13. Leave the **Employee ID** as NEW1, but start filling out other fields. After a few fields, close the record.

14. Use the **Lookup** process to open all employees for editing.

15. Select the **NEW1** employee.

As you can see, the record has been saved with the Employee ID of NEW1.

Before closing this record group, we want to check one last thing. Take a look at the Record Counter in the Navigation Bar. Notice that this new record has been added to the record group. For example, if the counter said 1 of 33 before, it should now say 34 of 34 because the new record has been added at the end of the group and is now the active one.

16. On the Tool Bar, click the **Close Employee** button to close the record. We will delete this employee in a later tutorial.

17. Continue with the next tutorial.

Tutorial 2.2 – Transfer a Record

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

You can only transfer an employee when editing an employee record or group. First, let's see how a transfer works with a group.

1. Use the **Lookup** process to open all employees for editing.
2. Select the employee with an **Employee ID** of **2006**.

Make note of the Record Counter in the Navigation Bar.

3. On the **File** menu, select **Transfer Employee**.

The Transfer screen is displayed.

4. In the **Transfer Type** field, click the popup button.

The Transfer Type screen is displayed, which lists two options. The Current Record option is used to transfer the current employee. The Current Group option is used to transfer all of the records in the group.

5. The **Current Record** option should already be highlighted, so click **OK** to select that.
6. In the **Transfer To** field, click the popup button.

A list of the companies to which you have access is displayed, not including the current company.

7. The **ARCHIVE** company should already be highlighted, so click **OK** to select that.
8. Click **Transfer** to perform the transfer.

First, let's look at what happened to the Record Counter. You should see that it has changed. For example, if the 2006 record was 30 of 34, the counter would now say 30 of 33 and be showing the record that was the next record in the group. If the 2006 record was 34 of 34, the counter would now say 1 of 33. Transferring a record in a group of records causes the next record in the group to be displayed. If the record being transferred is the highest numbered record in the group (the last record, but not the only record), the first record in the group is displayed.

The transfer process is a move and not a copy. Thus, the record has been deleted from the ACTIVE company and now exists only in the ARCHIVE company. Let's prove it.

9. Close the record group. Try to look up record **2006**. You are not able to do so.
10. On the **File** menu, use the **Select Company** option to switch to the **ARCHIVE** company.
11. Now try to look up record **2006**. The record you transferred will be found. Open the record.

Now, let's transfer the record from ARCHIVE back to ACTIVE.

12. On the **File** menu, select **Transfer Employee**.

The Transfer screen is displayed.

13. In the **Transfer Type** field, select **Current Record**.

14. In the **Transfer To** field, click the popup button.

The list of companies is displayed. Note that ACTIVE is shown and that ARCHIVE is not because you cannot transfer a record within the same company.

15. The **ACTIVE** company should already be highlighted, so click OK to select that.

16. Click **Transfer** to perform the transfer.

Because we only had one record in the group and then transferred that record, the group was closed. The record is now in the ACTIVE company again and deleted from the ARCHIVE company.

When a record transfers, everything in the record transfers. If there are dozens of Performance Appraisals, Compensation History, and Benefits Enrollments, they all transfer.

17. On the **File** menu, use the **Select Company** option to return to the **ACTIVE** company.

18. Continue with the next tutorial.

Tutorial 2.3 – Delete a Record

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

You can only delete an employee when editing an employee record or group.

1. Use the **Lookup** process to only open the record with an **Employee ID** of **2006**.
2. On the **File** menu, select **Delete Employee**.

The following message is displayed:

Delete this employee?

3. Click **Yes** to delete the employee record.

Because we only had one record in the group and then deleted that record, the group was closed. This behaves just like the transfer did, which is really a delete itself.

4. Try to look up record **2006**. You will not be able to do so.
5. Now use the **Lookup** process to open all employees for editing.
6. Select the **NEW1** employee.

Make note of the Record Counter in the Navigation Bar.

7. Now delete the **NEW1** employee.

What happened to the Record Counter? You should see that it has changed just like when the transfer was done.

8. Close the record group.

Note: For your protection, there is no obvious way to delete records in groups. The feature would be too dangerous. If you ever need to delete a large number of records, you should consult with your Support Representative.

9. Continue with the next tutorial.

Tutorial 2.4 – Copy a Record

The Copy Record function can be a big timesaver. Imagine that the roof just caved in on our training class (ouch!). We would have just been involved in the same incident but probably had a variety of injuries. We would want to create an incident that contained the information about the incident itself, copy that multiple times and then put in the details for each person. This would save you typing in the same general information over and over again. Let's do an example.

1. Switch to the **Safety Management** module.
2. On the **File** menu, select **New Incident** or on the Shortcut Bar, click **New Incident**.
3. Click **Create** to create the record from scratch.
4. In the **Incident Description** field, enter **Roof Collapse**.
5. In the **Incident Date** field, enter today's date.
6. In the **Incident Time** field, enter the current time.

You would enter more information on this and other screens about the incident itself but let's save some typing and assume all that entry has now been done.

7. On the **File** menu, select **Save Incident**.

We are now ready to copy this record with the common information in it.

8. On the **File** menu, select **Copy Incident**.

The following message is displayed:

Copy this record?

9. Click **Yes** to copy the record.

You will see an extracting message down in the Status Bar as the copy is being done. When the copy is complete, you will be in the newly created record, which has been placed at the end of the current group like any new record. You can see that the information from the original incident record has been copied to this new incident record. You would now add details for a specific person in this incident record. You just saved yourself a lot of time and effort.

There is one other way to copy a record. Let's take a look at that.

10. On the Tool Bar, click the **New Incident** button.

The Create Incident screen is displayed with the Incident Source field set to Scratch. We have always created a new record from scratch up until now. This time, we will use the Copy option.

11. In the **Incident Source** field, select **Copy**.

12. In the **Source ID** field, click the popup button.

The Lookup Incident screen is displayed.

13. Click **Search** and select the incident record you originally created from scratch.

You are returned to the Create Incident screen, and the Source ID and Description fields now contain the information for the record you selected.

14. Click **Create**.

When the copy is complete, you will be in the newly created record, which once again is a copy of the original incident record.

You can use either method to copy records. You have lots of options!

15. Delete all of the incident records you just created.

16. Switch back to the **Personnel Management** module.

17. Continue with the next tutorial.

Tutorial 2.5 – Using a Record Template

We just saw how copying a record can save a lot of time when you have records that are related. Templates can be used to perform a similar purpose when there is a recurring commonality among records. For example, employees might all receive the same company property items upon hire. They might also be required to attend employee orientation training. There are also sometimes different groups of employees, such as admin and customer support, who have some additional, but different training requirements. It would be nice to have the common information already entered in a record that could be used as a template. This template can then be used to create new employee records. Let's demonstrate how templates can be used.

1. On the **File** menu, select **New Employee** or on the Tool Bar, click the **New Employee** button. Click **Create** to create the record from scratch.

Now, we need to flag this record as a template. It is a good idea to have the Employee ID of a template follow a naming convention of your choice. This makes templates easily identifiable. In our case, we are going to use an Employee ID of Template, but it can be anything you desire and is not required.

2. In the **Employee ID** field, enter **Template**.

Now, we need to tell the system that this is a non-active, template record.

3. On the **File** menu, select the **Record Status** menu option.

The Record Status screen is displayed.

4. Clear the **Record Active** check box because this record is a template and not active.
5. Select the **Template** check box.
6. Close the **Record Status** screen, saving your changes.

Now, let's enter property items that every new employee receives.

7. Using the **Screen** dropdown, select the **Status** screen.
8. Click the **Property** button.
9. In the **Property Type** column, enter the following items:

ID Card
Keys
Policy Manual

10. Close the **Company Property** screen, saving your changes.
11. Close the record, saving your change.

Now, we have a template record that we can use when creating a new record. You would normally enter a lot of other standard information in a template, but this information is enough for our demonstration.

12. On the Tool Bar, click the **New Employee** button.

The Create Employee screen is displayed with the Employee Source field set to Scratch. Now it is time to try out the Template option.

13. In the **Employee Source** field, select **Template**.

14. In the **Source ID** field, click the popup button.

The Select Template screen is displayed. Since we only have one template record, it is the only one listed. You can create as many templates as you need. In our earlier example of admin versus customer support employees, you might want two templates because of their different training requirements.

15. Click **OK** to select that template record.

You are returned to the Create Employee screen, and the Source ID and Description fields now contain the information for the template record you selected.

16. Click **Create**.

When the copy is complete, you will be in the newly created record, which is a copy of the template record.

17. In the newly created record, navigate to the **Status** screen and select the **Property** button.

There is the information from the template. You would then enter any other information needed on this screen, such as the Issue Date. We won't take time to do that.

18. Close the **Company Property** screen.

The new employee record has been populated with all of the data that was in the template record. This can be a big timesaver.

19. Stay in this record.

20. Continue with the next tutorial.

Tutorial 2.6 – View History for a Record

People-Trak can capture three types of history for a record: Edit, Transaction and Audit. In this tutorial, we will view edit and transaction history.

Whenever you change a field in a record, it is added to the Edit History log. This log enables you to see unsaved changes made in the current record. Let's do a couple changes and see how this works.

1. You should still be in the record that was just created by using the template.

At this point, you would normally enter the data for this new employee. Let's just enter a first and last name for demonstration purposes.

2. Return to the **Personal** screen
3. In the **First Name** field, enter **John**.
4. In the **Last Name** field, enter **Adams** and press **ENTER**.
5. On the **Audit** menu, select **Edit History**.

You will see the changes you made with the before and after values listed.

6. Close the **Edit History** screen.
7. In the **First Name** field, enter **James** and press **ENTER**.
8. On the **Audit** menu, select **Edit History** again.

You will see the first change you made listed first and the change you just made listed second. Changes are listed in the Edit History screen in the order they were created.

9. Close the **Edit History** screen.

Let's undo the last change we made.

10. Position to the **First Name** field you changed.
11. On the **Edit** menu, select **Undo** or on the Tool Bar, click the **Undo** button.

You will see the last change you made revert back to the change before it.

12. Select the **Edit History** option again.

Your second change is no longer listed because it has been undone.

13. Close the **Edit History** screen.
14. On the Tool Bar, click the **Save** button.

The change you made will go from the modified color to the normal color because the change has been saved to the database.

15. Select the **Edit History** option again.

The following message is displayed:

There is no edit history for this record

This is because your change has been saved to the database. If this field was being audited, the Edit History log entry would have been transferred to the Audit History log when the record was saved.

Note: The Edit History log is also cleared whenever you close a record and choose not to save.

Now, let's view the transaction history for this record.

16. On the **Audit** menu, select the **Transaction History** menu option.

The following message is displayed:

There is no transaction history for this record

Note: The Transaction History menu option can be turned off for a user by clearing the Transaction History check box for the Audit menu in Security Setup- Module under the Menu tab.

17. Close the record.

There was no transaction history for the record because transaction history is not being saved for the Personnel Management module. When People-Trak is shipped, all standard modules are set to not save transaction history, but this setting can be changed.

Let's start saving transaction history for the workflows in the Personnel Management module.

18. On the **Setup** menu, select **Module Setup**.

19. Select the **General** tab.

20. Select the **Save Transaction History** check box in the **Settings** frame.

21. Close the **Module Setup** screen, saving your changes.

22. Open the record for **John Adams** and make a change to a couple of fields. Click the **Save Employee** button on the Tool Bar to save the changes and stay in the record.

23. On the **Audit** menu, select **Transaction History**.

The Transaction History screen is displayed showing an entry for the Standard-Employee workflow in the top list box and the detail for that highlighted transaction in the Changes grid at the bottom. These are the changes you just made and saved.

24. Close the **Transaction History** screen. Make another change in the current record and click the **Save Employee** button. Then select **Transaction History** once again.

Now you will see two transaction entries for your workflow, with the most recent

transaction on top and highlighted. You will also see the change you just made in the Changes grid.

The transaction history for a record provides important information about what has happened to this record. Capturing transaction history can be extremely valuable when combined with an approval process.

25. Close the **Transaction History** screen.

We will be looking at auditing in the next lesson, but let's take a quick look at audit history now to see how saving transaction history affects that as well.

26. On the **Audit** menu, select **Audit History**.

You should see the changes you just made because saving transaction history is auditing all fields on the workflow, whether or not those fields have been specifically set for auditing in Audit Setup or Screen/Field Customization.

Note: The Audit History menu option can be turned off for a user by clearing the Audit History check box for the Audit menu in Security Setup- Module under the Menu tab.

27. Close the **Field Audit History** screen and close the record.
28. On the **Setup** menu, select **Module Setup**.
29. Select the **General** tab.
30. Clear the **Save Transaction History** check box in the **Settings** frame.
31. Close the **Module Setup** screen, saving your changes.
32. Exit **People-Trak**.
33. This concludes this tutorial and lesson.