

Basics Series-4010

Query and Reporting 3

Version 9.0

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Technical Difference, Inc.
5256 S. Mission Road #210
Bonsall, CA 92003
(800) 273-3760
(866) 693-4869 (fax)

www.people-trak.com

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Workbook

Date Variable Substitution

Date fields have a powerful feature known as “variable substitution”. When creating an equation with a date field, you have the option of entering a date variable into the Contents field rather than an actual date. This is extremely useful in specifications that are to be run on a periodic basis. For example, you may need to create a report that lists the performance reviews due during the current week. Assuming the week is the first week of January 2007, you would enter the equations as shown below.

Appraisal Next Date >= 01-01-2007 AND
Appraisal Next Date <= 01-07-2007

This works fine until the following week. Then the equations have to be modified to work for that week. Using variable substitution you would enter the equations as shown below using the two date variables: START-OF-WEEK and END-OF-WEEK.

Appraisal Next Date >= START-OF-WEEK AND
Appraisal Next Date <= END-OF-WEEK

These equations may never need to be changed because the correct dates are always substituted for you.

Date substitution variables can be entered directly into the Contents fields or can be selected using the Date Variable popup, which is the regular popup button to the right of the Date popup button . When you use the Date Variable popup, a list of the date variables is displayed in a screen like the one shown below. Each of the date variables is described in detail in the sections below.

Date Variables with Between and Outside Operators

The Contents field is supported by the applicable table when you use a field that is supported by a table. When you use a field supported by a table or a date field and you also use the Between or Outside operators, the Between or Outside screen is used to specify the two values to be used with the Between and Outside operators. Each of the fields is supported by either the appropriate table or date popups. Once you have entered the two values, the appropriate phrase is returned to the Contents field. For example, if you have used date substitution variables for a date field, the phrase shown below would be returned.

START-OF-MONTH AND END-OF-MONTH

Day-Based Date Variables

The date associated with the day variables is derived at the moment it is requested. Thus, if you are working near midnight, you will get different results with the day-based variables depending on whether it is 11:59 PM or 12:01 AM. Consider the query shown below.

Hire Date = TODAY

If you run a report with this query prior to midnight on June 1, 2002, it will list all of the employees with hire dates of June 1, 2002. If you run a report with this query just after

midnight on June 2, 2002 (thinking it is still “today”), the report will actually list all of the employees with hire dates of June 2, 2002.

TODAY

Defines the date associated with today. This variable is extremely useful when generating “year-to-date” reports. For example, if you wish to generate a report listing those employees who have been hired for the year to date, you would use the equations listed below.

Hire Date >= *START-OF-YEAR* *AND*
Hire Date <= *TODAY*

Regardless of when you run this report, the report will always contain a list of the employees hired since the start of the year.

TOMORROW

Defines the date associated with tomorrow. It works very much like the TODAY variable.

YESTERDAY

Defines the date associated with yesterday. It works very much like the TODAY variable.

THIRTY-DAYS-BACK

Defines the date associated with the day 30 days ago. This variable is very useful when used in conjunction with the TODAY variable to limit records to those with dates within a backward rolling 30-day range. For example, if you wish to generate a report listing those employees who have been hired in the last 30 days, you would use the equation set shown below.

Hire Date >= *THIRTY-DAYS-BACK* *AND*
Hire Date <= *TODAY*

Regardless of when you run this report, the report will always contain a list of the employees hired in the last 30 days, even if the 30-day period overlaps year ending dates or month ending dates.

THIRTY-DAYS-FORWARD

Defines the date associated with 30 days from now. This variable is very useful when used in conjunction with the TODAY variable to limit records to those with dates within a forward rolling 30-day range. For example, if you wish to generate a report listing those employees who have performance reviews due in the next 30 days, you would use the equation set shown below.

Appraisal Next Date >= *TODAY* *AND*
Appraisal Next Date <= *THIRTY-DAYS-FORWARD*

Regardless of when you run this report, the report will always contain a list of the employees with review dates in the next 30 days, even if the 30-day period overlaps year-ending or month-ending dates.

Note: The “THIRTY-DAY” variables should not be confused with the START-OF-MONTH, END-OF-MONTH variables. The START-OF-MONTH variable is tied to the first day of the current month. That day could be between 1 and 30 days ago. If you use the START-OF-MONTH variable on the second day of a month, the query will actually look back just 2 days and not the 30 days you were expecting. The END-OF-MONTH variable is tied to the last day of the current month. That day could be between 1 and 30 days from today. If you use the END-OF-MONTH variable on the tenth day of a month, the query will actually look forward

just 20 days and not the 30 days you were expecting. To ensure a true rolling 30-day cycle, use the “THIRTY-DAY” variables.

SIXTY-DAYS-BACK

Defines the date associated with 60 days ago. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is 60 days rather than 30.

SIXTY-DAYS-FORWARD

Defines the date associated with 60 days from now. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is 60 days rather than 30.

Note: The “SIXTY-DAY” variables should not be confused with the START-OF-PRIOR-MONTH, END-OF-NEXT-MONTH variables. The START-OF-PRIOR-MONTH variable is tied to the first day of the prior month. That day could be between 1 and 60 days ago. If you use the START-OF-PRIOR-MONTH variable on the second day of a month, the query will actually look back just 32 days and not the 60 days you were expecting. The END-OF-NEXT-MONTH variable is tied to the last day of the next month. That day could be between 1 and 60 days from today. If you use the END-OF-NEXT-MONTH variable on the tenth day of a month, the query will actually look forward just 50 days and not the 60 days you were expecting. To ensure a true rolling 60-day cycle, use the “SIXTY-DAY” variables

NINETY-DAYS-BACK

Defines the date associated with 90 days ago. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is 90 days rather than 30.

NINETY-DAYS-FORWARD

Defines the date associated with 90 days from now. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is 90 days rather than 30.

Note: The “NINETY-DAY” variables should not be confused with the START-OF-QUARTER, END-OF-QUARTER variables. The START-OF-QUARTER variable is tied to the first day of the current quarter. That day could be between 1 and 90 days ago. If you use the START-OF-QUARTER variable on the second day of the second month of the quarter, the query will actually look back just 32 days and not the 90 days you were expecting. The END-OF-QUARTER variable is tied to the last day of the current quarter. That day could be between 1 and 90 days from today. If you use the END-OF-QUARTER variable on the tenth day of the second month of the quarter, the query will actually look forward just 50 days and not the 90 days you were expecting. To ensure a true rolling 90-day cycle, use the “NINETY-DAY” variables.

ONE-YEAR-BACK

Defines the date associated with one full year ago. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is one year rather than 30 days.

ONE-YEAR-FORWARD

Defines the date associated with one full year in the future. This variable can be used just like the 30-day variable described above. The only difference is that the cycle is one year rather than 30 days.

Note: The “ONE-YEAR” variables should not be confused with the START-OF-YEAR and END-OF-YEAR variables. The START-OF-YEAR variable is tied to January 1 of the current year. That day could be between 1 and 365 days ago. If you use the START-OF-YEAR

variable in the middle of the year, the query will actually look back only half as far as you intended. The END-OF-YEAR variable is tied to December 31 of the current year. That day could be between 1 and 365 days from today. If you use the END-OF-YEAR variable in the middle of the year, the query will actually look forward half as far you intended. To ensure a true rolling year cycle, use the “ONE-YEAR” variables.

USER-DAYS-BACK-1

Defines the date associated with a user-defined number of days ago. The number of days actually used is defined on the Date Variables tab of the Enterprise Setup process.

USER-DAYS-FORWARD-1

Defines the date associated with a user-defined number of days in the future. The number of days actually used is defined on the Date Variables tab of the Enterprise Setup process.

USER-DAYS-BACK-2

Defines the date associated with a user-defined number of days ago. The number of days actually used is defined on the Date Variables tab of the Enterprise Setup process.

USER-DAYS-FORWARD-2

Defines the date associated with a user-defined number of days in the future. The number of days actually used is defined on the Date Variables tab of the Enterprise Setup process.

Week-Based Date Variables

The week-based variables come in pairs, one for the start of a given week and one for the end of the given week. The “start” day in these variables is associated with the Monday of that week. The “end” day in these variables is associated with the Friday of that week.

The date associated with a week variable is derived at the moment it is requested. Thus, if you are working near midnight on Saturday night, you will get different results with the day-based variables depending on whether it is 11:59 PM on Saturday night or 12:01 AM on Sunday morning. Consider the query shown below.

Hire Date >= *START-OF-WEEK*

If you run a report with this query prior to midnight on a Saturday, it will list all of the employees with hire dates during the week ending at midnight. If you run a report with the same query just after midnight (early Sunday morning), it will list all of the employees with hire dates during the week that just began.

START-OF-WEEK

Defines the date associated with Monday of the current week. The current week begins at 12:01 AM on Sunday morning.

END-OF-WEEK

Defines the date associated with Friday of the current week. The current week ends at 11:59 on Saturday night.

START-OF-NEXT-WEEK

Defines the date associated with Monday of the following week.

END-OF-NEXT-WEEK

Defines the date associated with Friday of the following week.

START-OF-PRIOR-WEEK

Defines the date associated with Monday of the prior week.

END-OF-PRIOR-WEEK

Defines the date associated with Friday of the prior week.

Month-Based Date Variables

The date associated with a month variable is derived slightly differently than its “Week-based” relative. It is not derived at the “moment” it is requested. Rather, it is derived when you log into People-Trak. Thus, if you are working near midnight on the last day of the month, you will get the same results with the month-based variables even if you cross midnight and pass into a new month during the current edit session. If you wish to reset the month variables because you are working late, simply exit People-Trak and then come back in.

START-OF-MONTH

Defines the date associated with the first day of the current month.

END-OF-MONTH

Defines the date associated with the last day of the current month.

START-OF-NEXT-MONTH

Defines the date associated with the first day of the next month.

END-OF-NEXT-MONTH

Defines the date associated with the last day of the next month.

START-OF-PRIOR-MONTH

Defines the date associated with the first day of the prior month.

END-OF-PRIOR-MONTH

Defines the date associated with the last day of the prior month.

Quarter-Based Variables

The quarter-based date variables in People-Trak are based on the following dates.

Quarter 1: January 1 to March 31

Quarter 2: April 1 to June 30

Quarter 3: July 1 to September 30

Quarter 4: October 1 to December 31

The date associated with a quarter variable is derived when you log into People-Trak, like the “Month-based” variables. Thus, if you are working near midnight on the last day of the quarter, you will get the same results with the quarter-based variables even if you cross midnight and pass into a new quarter during the current edit session. If you wish to reset the quarter variables because you are working late, simply exit People-Trak and then come back in.

START-OF-QUARTER

Defines the date associated with the first day of the current quarter. The date will be January 1, April 1, July 1, or October 1.

END-OF-QUARTER

Defines the date associated with the last day of the current quarter. The date will be March 31, June 30, September 30, or December 31.

Year-Based Variables

The year-based date variables in People-Trak are based on the calendar year that starts on January 1 and ends on December 31.

The date associated with a year variable is derived when you log into People-Trak, like the “Month-based” variables. Thus, if you are working near midnight on the last day of the year, you will get the same results with the year-based variables even if you cross midnight and pass into a new year during the current edit session. If you wish to reset the year variables because you are working late, simply exit People-Trak and then come back in.

START-OF-YEAR

Defines the date associated with January 1 of the current year.

END-OF-YEAR

Defines the date associated with December 31 of the current year.

START-OF-PRIOR-YEAR

Defines the date associated with January 1 of the prior year.

END-OF-PRIOR-YEAR

Defines the date associated with December 31 of the prior year

Date Substitution Examples

Date Substitution variables can be used in any combination. Together they should meet a wide variety of filtering needs. A few examples are presented below.

<i>Employment Status</i>	=	<i>TERMINATED</i>	<i>AND</i>
<i>Status Date</i>	>=	<i>START-OF-YEAR</i>	<i>AND</i>
<i>Status Date</i>	<=	<i>TODAY</i>	

This filter includes all employees terminated since the start of the current year. This would be a typical query for terminated employees for year to date.

<i>Employment Status</i>	=	<i>NEW-HIRE</i>	<i>AND</i>
<i>Status Date</i>	>=	<i>START-OF-MONTH</i>	<i>AND</i>
<i>Status Date</i>	<=	<i>END-OF-MONTH</i>	

This filter includes all employees hired during the current month. This would be a typical query for new hires for the current month.

Date Variables and the Scheduler

Date substitution variables are crucial to the use of the scheduler. Any document that uses dates and is to be scheduled should use date variables whenever possible. Otherwise, the scheduled report will not move with the dates. For example, if you schedule a “review due next week” report with hard-coded dates, the report will be obsolete after the first week. The document will show up in the scheduler, but will be the wrong report. If you used “week” date variables in the report and schedule the report to be run weekly, the report will always be timely.

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.

Using the 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.

You can create a query using all of the advanced query capability of People-Trak. The query that you develop on the Advanced tab is used for a single lookup and is then discarded. If you wish to create and use an advanced query more than once, consider using the Favorites feature as defined in the following section.

Lookup Favorites

A lookup favorite document is not really a document, but is created and used like one. A lookup favorite document does not produce a printed result, but is used with the Lookup feature and Quick Search to produce “favorite lookups” that can be used over and over again.

The Lookup Favorites screen has two tabs. The Specification tab is used to record the name of the document and its categories. The Query tab is the standard query tab that is used to determine the records to be retrieved.

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.

Freeform Reports

The Freeform Report document type allows you to enter a SQL statement and a series of captions to create reports that you could not otherwise create. Normal use of this feature requires specific knowledge of SQL and internal knowledge of the People-Trak database.

The Freeform Reports feature bypasses all field security. If a user is allowed to create a Freeform Report, he or she can access any field within People-Trak. For this reason, there are special security settings for the Freeform Reports feature.

Note: You will only see Freeform Reports as an option on the Documents menu when either the Create Freeform Reports or Run Freeform Reports check box has been selected for your user.

The Freeform Reports option uses a three-tab screen. The Specification tab is similar to the Adhoc Report screen and is used to define basic information about the document. The SQL Statement tab contains a single text box for entering the SQL statement. The Report Captions tab contains a grid for entering captions and formatting formulas.

Specification Tab

The Specification tab is used to define setup information for the Freeform Report.

The specification tab of a freeform report is very similar to the specification tab of an adhoc report. The only differences are that a freeform report is always using auto formatting and is always in columnar format.

SQL Statement

The SQL Statement tab is used for entering the SQL statement that will generate the report.

Report Captions

The Report Captions tab is used to enter the caption and format of each field on the report.

Cluster Reports

The Cluster Report document type allows you to run several documents together as a group, without having to select and run each document separately. This feature is particularly valuable if you tend to run a series of documents at the end of each month, or merely on a frequent basis.

The Cluster Report option uses a two-tab screen. The Specification tab is used to record the name of the cluster and the categories for the cluster. The Documents tab is used to define the documents to include in the Cluster Report.

Specification Tab

The Specification tab is used to define setup information for the Cluster Report. The specification tab of a cluster report is very similar to the specification tab of an adhoc report.

Documents Tab

The Documents tab is used to define the documents to include in the cluster report. Cluster reports cannot be selected.

Running a Cluster Report

To run the cluster report, use the Run Cluster Report option on the File menu or the Run Cluster Report button on the Tool Bar. Each document will be processed independently, and you may see the progress bar for each.

When the documents are complete, they are merged together and then shown within the Document Viewer. The documents are discrete within the Document Viewer. The page counter on the Tool Bar reflects the total number of pages in the document, but each document's pages are numbered from 1 to the total number of pages in the document. Font settings, alignment, spacing, and grid lines are all unique to each document. If you choose to print the document, one stream of pages will be printed.

Because it is possible to mix the types of documents in a cluster report, the Navigation Bar is not available for Form/Letter/Label documents and the Output to Spreadsheet option is not available. The Cluster Report feature is intended to provide an easy way of outputting several documents; it is not intended to be used for interactive purposes.

Standard Reports

The Standard Reports screen has two tabs. The Specification tab is used to record the document name, categories, template to be used and sort order. The Query tab is the standard query tab and is used to record the query equations that determine which records are to be included in the report.

Document Properties

Spanning Tab

The Spanning tab is used to activate company spanning. Documents are normally produced using a query that selects records from the current company. With company spanning, you can cause any document to select records from a collection of companies, not just the current company. For example, if you wish to run a report that includes records from both the active and the archive databases, you can specify these databases with the company spanning feature. Whenever this document is run, it will collect applicable records from both companies.

Company spanning is not used by default. In other words, if you do not specify company spanning, the current company is used.

In Freeform reports, spanning is done by default so no Spanning tab is available.

Note: Spanning is only available to Administrators for security purposes, so when non-administrators run a document that spans, they will only see information for the current company and based on their given security.

Lesson 8

Date Variable Substitution

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

Tutorials

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

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

Tutorial 8.1 – Entering Date Variables

Date variables cannot be keyed directly into the Contents column. They must be selected from the Date Variables table. We will learn how to do this in this tutorial.

1. On the **Documents** menu, select **Adhoc Reports**.
2. On the Tool Bar, click the **New Adhoc Report** button to create a new document.
3. On the **Report Definition** tab, enter the following **Field Names: Full Name** and **Hire Date**.
4. On the **Query** tab, enter **Hire Date** as the first field. Set the **Operator** to “>”.

Your cursor should now be in the Contents column. Two popup buttons are displayed. The first is the Date Calendar button, which is used to select a date from a calendar. The second is the Date Variable button, which is used to select a date variable from a list of variables.

5. Click the **Date Variable** popup button.

The list of date variables, sorted by categories, is displayed.

Let’s assume you are looking for those employees hired since the beginning of last month.

6. Select the **Months** category.

The choices appearing to the right of the category all now pertain to months.

7. Select **START-OF-PRIOR-MONTH** from the displayed list.
8. Run the report.

You can see that there were no new employees hired since the beginning of last month. Let’s tweak the report a little bit and run it again.

9. In the **Contents** field, click the **Date Variable** popup button. Select the **Years** category. Select **START-OF-PRIOR-YEAR**.

The equation will now select those employees with a hire date since the start of last year.

10. Run the report.

If there are any employees with hire dates since the start of last year, they will be listed.

11. Set the **AND** link on the first row. Then add **Hire Date** on the second row. Set the **Operator** to “<”. Use the **Date Variable** table again using the category **Years** and select **END-OF-PRIOR-YEAR**.
12. Run the report.

This sample report will now list those employees with a hire date between the start of last year and the end of last year.

13. Close the **Document Viewer**.

There are two anniversary operators for use with date fields that make creating scheduled anniversary reports a breeze. They would typically be used with date variables, so let's take a look at those now.

14. In the first row of the query, change the **Operator** to **Anniv** and the **Contents** to **TODAY**. Remove the **AND** link and delete the second query row.

15. Run the report.

If there are employees that have a hire date with the same month and day as today, they will be listed.

16. Close the **Document Viewer**.

If you want to just compare the month, use the Anniv-M operator.

17. Change the **Operator** to **Anniv-M** and run the report.

If there are employees that have a hire date with the same month as today, they will be listed.

18. Close the **Document Viewer** and the **Adhoc Reports** screen.

19. Continue with the next tutorial.

Tutorial 8.2 – Appraisals Due Example

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

1. Create a new **Adhoc Report**.
2. On the **Report Definition** tab, enter the following three fields: **Department Name**, **Full Name**, and **Appraisal Next Date**. Set a **Sort Type** of **Eject** on the **Department Name** field. Set a **Sort** on **Full Name**. Set a **Sort** on the **Appraisal Next Date**, but use **Descending** order. Set “*” as the **Row Modifier** on the **Appraisal Next Date**.
3. Run the report.

The report should list all next appraisals for each employee sorted by next appraisal date. Each time the Department Name field changes a new page will start. This report is designed for distribution to each manager with a list of the employees who are due for appraisals over a specified period. At this point, the report includes all employees and all appraisals. Let’s correct that with a query.

One typical version of this report is run at the end of each week and is designed to list the appraisals due the following week. It would use the query equations as shown in the next step.

4. On the **Query** tab, enter the following equations:

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

5. Run the report.

You should see a report listing employees that have an appraisal due next week.

This report has an error. It shows all next appraisals for any employee who has an appraisal due next week. Let’s fix that.

6. On the **Report Definition** tab, change the **Row Modifier** for the **Appraisal Next Date** field to “=”.
7. Run the report.

This basic report can be modified to produce reports that look ahead over any of the available periods. The most useful for Performance Appraisals are the next month, and the next 30 days. The appropriate equations are shown below.

```
Appraisal Next Date * >=      START-OF-NEXT-MONTH   AND
Appraisal Next Date * <=      END-OF-NEXT-MONTH
```

```
Appraisal Next Date * >=      TODAY                       AND
Appraisal Next Date * <=      THIRTY-DAYS-FORWARD
```

Note that the second pair of equations makes use of the TODAY variable to start the 30 day period from today through a day 30 days from now.

Another useful variation of this report is a version that looks backward for a topmost next

appraisal that is prior to today. This would represent appraisals that were scheduled and not performed. To create this report, you would change the Modifier on the Query tab to be blank or 1 and then set the date variables to START/END-OF-PRIOR-WEEK or START/END-OF-PRIOR-MONTH.

8. Close the **Document Viewer**, the **Adhoc Reports** screen and the **Explorer**.
9. This concludes this tutorial and lesson.

Notes

Lesson 9

Advanced Query

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This lesson provides a basic introduction to derived fields, how to select a derived field for use in report and demonstrates how to use a query statement on that report.

Tutorials

Derived Field and Query on a Report: shows how to select a derived field for use in report and demonstrates how to use a query statement on that report.

Changing Periods for User Date Variables: demonstrates how to change the periods used for a user date variable.

Derived Field Attendance Report: reviews using a derived field and query for an attendance report.

Tutorial 9.1 – Derived Field and Query on a Report

Before moving on to using advanced query methods, we need to explore the concept of using and querying derived fields in an adhoc report.

1. Create a new **Adhoc Report** using what you have learned in prior lessons and give your new report the name **Address Block**.
2. For the **Explorer Category** and **Category**, select **Personal**.
3. Under the **Report Definition** tab, bring up the **Select Field** screen. Under the **All Fields** category, move down the list of fields until you see the **Address Block** field and highlight it.

Before selecting this field for our report, notice that the field ID is quite different from the field ID's we have seen before. It starts with DERIVED and is followed by an underscore and a number. This is because Address Block is a derived field.

Derived fields are fields that are derived from one or more existing fields (including existing derived fields) within People-Trak. Some derived fields may be used for calculations, such as figuring out a pay increase, and others combine multiple fields such as address information into a single field. Derived fields are not stored in the database; they are derived when they are used on a document. Let's see what happens when we run a report with the Address Block field.

4. Select the **Address Block** field and run the report.

While we selected a single field, we can easily see that much more information was returned to us. This particular derived field contains the employee's full name as well as their address. It is ready to be used on a letter or label and eliminates the need to enter each field individually on a commonly used group of fields.

Say we wanted to run this same report, but only for the employees that live in Fallbrook. We have seen that the Address Block 'contains' the name of the city that each of our employees live in, so our query can be based on the contents of the derived field.

5. Under the **Query** tab enter the equation shown below and then run the report:

Address Block Contains Fallbrook

Our Fallbrook residents are returned to us with their address block fields verifying that they are indeed from Fallbrook.

Now that we have a better grasp of the concept of querying with derved fields, we can see it in action in the next few tutorials.

6. Close all screens without saving changes.
7. Continue with the next tutorial.

Tutorial 9.2 – Changing Periods for User Date Variables

In the next tutorial, we will be using a derived field that has been created specifically for our attendance policy. This particular derived field calculates the sum of the hours used over a specified number of days in attendance history for the illness account. Currently we are looking for violations that occurred in the past 45 days.

The user date variable, USER1-DAYS-BACK, is used in the derived field formula. Let's make sure this particular date variable is indeed set to 45 days.

1. On the **Setup** menu, select **Enterprise Setup**.
2. Click the **Date Variables** tab.

The Date Variables tab shows the user date variables that exist in People-Trak and allows you to change the periods associated with them. The system date variables (i.e. TODAY, TOMORROW, START-OF-NEXT-WEEK) are not included because they are calculated internally by People-Trak.

As you can see, the Periods column for the USER1-DAYS-BACK date variable is currently set at 120.

This date variable will be converted to a date exactly 120 days before today's date. Because we only need to look back 45 days, this needs to be fixed.

3. Change the number in the **Periods** column to **45**.
4. Close the **Enterprise Setup** screen, saving your changes.

Tutorial 9.3 – Derived Field Attendance Report

Our next task involves changing attendance data for a few of our employees and then creating our attendance report. To make it faster and easier, we will use batch processing.

1. On the **Processing** menu, select **Attendance Batch by Employee** and create a new batch.
2. Enter **1006** in the **Employee ID** field and press **ENTER** to return **Donald Stern's** full name.
3. For the **Account** field select **Illness**.
4. In the **Start Date** field, use the calendar popup button to select a date from four weeks ago and select **OK**.
5. Use the same date for the **End Date** field.
6. In the **Amount** field, enter **12**.
7. For the **Absence Reason**, use the popup to select **Illness- Self**.
8. Continue using the same data on the next three rows, each time moving up the Start and End dates up by a week.

You should have four different attendance transactions for Donald that are ready to be posted.

You may have also noticed that once the last entry was entered into the grid, the following message was displayed:

The amounts entered exceeded the current balance of 45 hours.

This means Donald has successfully violated company policy and used up more hours than he had available in his Illness account. Oops!

9. Select **OK** to close the message and you will see that the **Negative Balance** field has been updated with an **X**. This serves to let us know that this specific entry will put Donald's account balance in the negative once the batch is posted.
10. Create another entry, this time for **Julie Carrington**.
11. Use **today's date** for the **Start** and **End Dates** and select the same **Illness Account** and **Absence Reason** that we used for Donald.
12. In the **Amount** fields, enter **45**.
13. Post the batch and close out of the document viewer once the audit trail is displayed.
14. Continue with the next tutorial.
15. Create a new **Adhoc Report** and give it the name **45 Day Illness Overage** and assign it to the Attendance explorer category and category.
16. Select the **Report Definition** tab and select the following fields for our report:

Full Name

Attendance History Account

Attendance Start Date

Attendance End Date

Attendance Hours

Attendance Lookback

17. On the **Full Name** field, select a **Sort Type** of **Eject**.
18. Clear the **Repeat** check box for the **Full Name**, **Attendance History Account** and **Attendance Lookback** fields.
19. Set the **Row Modifier** to = for the **Attendance History Account**, **Attendance Start Date**, **Attendance End Date** and **Attendance Hours** fields.
20. On the **Query** tab, enter the equation shown below:

Attendance Lookback		>	40	AND
Attendance Start Date	*	>	USER1-DAYS-BACK	AND
Attendance History Account	*	=	ILL	

21. Run the report.

For Donald and Julie we can clearly see which attendance account has been violated, the dates the violations took place, how many hours were used each absence, and the sum of their account overage.

22. Save your changes and close all screens.
23. Continue with the next tutorial.

Notes

Lesson 10

Advanced Lookup and Favorites

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This lesson covers how to use the advanced features of the Lookup screen.

Tutorials

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

Creating a Favorite: demonstrates how to create a lookup favorite in the Explorer for use in the Lookup screen.

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

Using Lookup Options: shows how to use the lookup options that are available on the Options tab of the Lookup screen.

Tutorial 10.1 – Creating Custom Queries

The Custom tab on the Lookup screen is used to look up records using a simple single-line query.

1. On the Shortcut Bar, click **Open Employee** to start the lookup process.

The Lookup Employee screen is displayed.

2. Click the **Custom** tab.

The Custom tab contains three fields: Field Name, Operator, and Contents. These three fields are used to perform single-line queries for record lookups.

In the Field Name field, you can enter a field name if you know it by name or you can select the field by using the popup button.

3. In the **Field Name** field, enter **City**.

The Operator field is supported by a list of operators in the same way as the Query grid. The valid operators are determined by the type of field.

4. In the **Operator** field, enter =.

The Contents field takes on the edit attributes of the field specified. For the City field, this means that the Contents field is supported by the City table.

5. In the **Contents** field, select any city from the table.
6. Click **Search** to perform the search.

The list box shows all of the records that match your query. You can select any record from the list or you can start another query.

7. Instead of selecting a record, click **Clear** to clear the query.
8. In the **Field Name** field, enter **Hire Date**.
9. In the **Operator** field, enter >.

Your cursor should be in the Contents field, which takes on the edit characteristics of a date field, so both date popup buttons are available.

10. Use either popup button to select any date or date variable.
11. Click **Search** to perform the search.

Now, let's take a quick look at the Advanced tab.

12. Click the **Advanced** tab.

As you can see this tab uses the standard query grid. Like the Custom tab, this tab can be used for a custom query in the lookup process. The only difference is that this tab allows you to use a more advanced multi-line query.

13. Click **Cancel** to close the Lookup screen.
14. Continue with the next tutorial.

Tutorial 10.2 – Creating a Favorite

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

1. On the **Documents** menu, select **Lookup Favorites**.
2. On the Tool Bar, click the **New Lookup Favorite** button to create a new lookup favorite.

The Lookup Favorites screen is displayed.

3. In the **Lookup Name** field, enter **My Favorite**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.
4. On the **Query** tab, enter the following set of equations.

```
Gender      =      Male           AND  
(Age        >      30             OR  
Pay Rate   >      3000.0000)
```

You will recall that a similar set was used in an earlier lesson.

5. On the Tool Bar, click the **Run Lookup Favorite** button to test the query.

The test is a report that uses the standard lookup fields.

6. Close the **Document Viewer** and the **Lookup Favorites** screen.
7. Close the **Explorer**.
8. Continue with the next tutorial.

Tutorial 10.3 – Using Favorites

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

1. On the Shortcut Bar, click **Open Employee** to start the lookup process.

2. Click the **Favorites** tab.

The list box on the Favorites tab shows all of the Lookup Favorites that have been created.

3. Select **My Favorite** and click **Search** to perform the query associated with the favorite.

The list of records presented should match the test report run when the favorite was created. In the future, additional records may be present as records change and then match the criteria of the query. The query associated with a favorite is dynamic. The query equations are executed when the favorite is processed.

The results of a favorite are the same as the results of any lookup. You can select any record and return the entire group for editing.

The query associated with a favorite can be modified “on the fly” if desired. When a favorite is executed, the query equations from that favorite are moved into the grid on the Advanced tab. (You do not normally see this because you are positioned to the Favorites tab.) If you wish to make a change to the query and to select records again, you can do so.

4. Click the **Advanced** tab.

You can see the query equations that you entered when you created the favorite.

5. Modify the first line to look for **Female** instead of **Male**. Click **Search** to perform the lookup.

The list of records will change to reflect the new query.

The query equations associated with the favorite are not permanently changed. We are merely taking advantage of the fact that the equations are loaded into the grid on the Advanced tab just as if they had been keyed by hand.

6. Close the **Lookup** screen.

7. Continue with the next tutorial.

Tutorial 10.4 – Using Lookup Options

This tutorial shows how to use the lookup options that are available on the Options tab of the Lookup screen. We will first look at the spanning option, which allows you to do a lookup across companies. It is only available to Administrators for security purposes.

Let's transfer a record over to the ARCHIVE company so we can then demonstrate the spanning option.

1. Open **Anna Belamonte's** record. On the **File** menu, select **Transfer Employee**. Transfer the current record to the **ARCHIVE** company. Close any open records to return to the **Organizer** desktop.
2. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company. Open Anna's record to confirm that it has been transferred. Close the record and return to the **ACTIVE** company.
3. On the Shortcut Bar, click **Open Employee** to start the lookup process.
4. Click the **Search** button, which will return all records in the **ACTIVE** company since we have not specified any other conditions that must be met.

Note that Anna's record is not listed.

5. Click the **Options** tab.
6. Select the **Span Companies on Search** check box.

This will span companies during the current lookup. Note that the Search button is disabled when on this tab. This is because the system doesn't know which query you want to use. You must be on one of the other tabs that define a query to begin a search. We want to use the basic query.

7. Click the **Basic** tab, and then click the **Search** button.

This time you will see Anna's record included in the search results because all companies have been included in the lookup. Also notice that the Company column has been added to the search results.

8. Select **Anna's** record by highlighting it in the list and clicking **OK**.
9. Click **Yes** when asked if you want to switch to the **ARCHIVE** company.

Anna's record is opened. In the Navigation Bar, note that the Record Counter located between the blue arrows says 1 of 1. Not only did just this one record get opened, the company was also switched to ARCHIVE (notice the Archive Company text in the header). This is necessary because you cannot edit a record from the ARCHIVE company while in the ACTIVE company.

Note: In our example, there was only one record from the ARCHIVE company in our search results. If there was more than one record in the ARCHIVE company included in the search results, all of those ARCHIVE records would have been opened as a group and Anna's record would have been the active one. If the One Record option was also selected, then only Anna's record would have been opened. We'll learn more about that option in just a bit.

10. Close **Anna's** record.
11. Return to the **ACTIVE** company.
12. On the Shortcut Bar, click **Open Employee** to start the lookup process.
13. Click the **Options** tab.
14. Select the Span Companies on Search check box.
15. Click the **Basic** tab, and then click the **Search** button.

You should see both **ACTIVE** and **ARCHIVE** records in the search results. Note the number of records.

16. Highlight a record in the list from the **ACTIVE** company, which is our current company, and then click **OK**.

The highlighted record is opened. Note that the Record Counter does not say 1 of 1. The records in the search results have been opened as a group and your highlighted record is just the current record being displayed. Also note that the number of records opened does not equal the original number in the search results. This is because only records from the **ACTIVE** company were opened as a group. As we saw before, we cannot open records from the **ARCHIVE** company while in the **ACTIVE** company.

17. Click the blue **Next** button to the right of the **Record Counter** to verify that there are indeed other records that have been opened.
18. On the Tool Bar, click the **Open Employee** button to close the current group of records and start a new lookup process.
19. Click the **Options** tab.
20. Select the Single Record on Select check box.
21. Click the **Basic** tab, and then click the **Search** button.
22. Highlight a record in the search results and then click **OK**.

This time, only the highlighted record is opened. The Record Counter should say 1 of 1.

As you have seen, you have the option of returning just the highlighted record or all records in the search results. Each new lookup defaults to having the Single Record on Select check box cleared, which means all records in the search group will be returned.

23. Close the record.
24. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company.
25. Transfer Anna's record from the **ARCHIVE** company back to the **ACTIVE** company.
26. Switch back to the **ACTIVE** company.
27. This concludes this tutorial and lesson.

Notes

Lesson 11

Other Document Types and Properties

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This lesson covers other document types that are available in People-Trak: Standard Reports, Cluster Reports and Freeform Reports. It also covers the Spanning tab and Description field on the Document Properties screen.

Tutorials

Standard Reports: shows how to create a standard report, which is a report with a pre-defined format. Also shows how you can change the query for a standard report.

Cluster Reports: demonstrates how to create a cluster report, which is a report that allows you to run several documents together as a group.

Freeform Reports: shows how to create a freeform report, which allows you to enter an SQL statement and a series of captions to create reports that you could not otherwise create.

Spanning: demonstrates how to use spanning of companies on a document.

Tutorial 11.1 – Standard Reports

Standard Reports are those reports that have a pre-defined format. You can determine what employee records are to be included in the report, but the layout of the report is already set. Let's create a standard report.

1. On the **Documents** menu, select **Standard Reports**.

The Explorer for Standard Reports is displayed.

2. On the Tool Bar, click the **New Standard Report** button to create a new document.
3. In the **Document Name** field, enter **My Gender Graph**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.

A standard report document is composed of a standard report template and a query (which could be blank). So, we must select a report template in the Standard Report field.

4. In the **Standard Report** field, click the popup button to display a list of the existing report templates. Select the **Workforce Distribution by Gender** template.
5. Click the **Query** tab.

As expected, there are no query equations. So, if we run the report, we will see all records in the current company, including those that might be terminated or inactive.

6. Run the standard report.

The report is a pie chart that graphically indicates the gender makeup of the company. In this instance, it is all employees in the company regardless of status.

7. Scroll down to see the details that support the graph.
8. Close the **Document Viewer**.

Now, let's enhance the document by adding a query.

9. On the **Query** tab, enter the simple equation shown below.

Gender = **Male**

This query will limit the employee records in the report to those whose Gender is Male.

10. Run the report.

The graph should indicate that a report that queries only males should list only males.

11. Close the **Document Viewer**.

12. This time, change the query to the more meaningful equation below.

Active = **Y**

13. Now run the report.

This report will provide a chart with all currently active employees. Now that's a useful report.

14. Close the **Document Viewer** and the **Standard Reports** screen.
15. Close the **Explorer**.
16. Continue with the next tutorial.

Tutorial 11.2 – Cluster Reports

Cluster Reports allow you to run several documents together as a group, without having to select and run each document separately. This feature is particularly valuable if you tend to run a series of documents at the end of each month, or merely on a frequent basis.

1. On the **Documents** menu, select **Cluster Reports**.

The Explorer for Cluster Reports is displayed.

2. On the Tool Bar, click the **New Cluster Report** button to create a new document.
3. In the **Cluster Name** field, enter **Monthly Reports**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.
4. On the **Documents** tab, click the popup button.

The Select Document screen is displayed. Notice that Cluster Reports is not listed in the list of document types in the upper left pane. This is because cluster reports cannot include another cluster reports. You can choose from all other document types. We will select an Adhoc Report.

5. Stay in the currently highlighted **Adhoc Reports** type. Select the **Compensation** category in the list of categories in the lower left, and then select the **Salary History by Employee** document in the list on the right. Click **OK** to return that document to the **Documents** grid.

Let's add two more Adhoc Reports to our cluster report.

6. On the next row of the grid, use the popup and select the **Attendance Balances by Account** document from the **Attendance** category. Keep going and add the **Headcount by Department** document from the **Headcount** category.

We can mix document types in a cluster report. Let's add a letter.

7. On the next row of the grid, use the popup and select **Letters** in the list of document types. Now, select the **Welcome Letter** document in the list on the right. Click **OK** to return that letter to the **Documents** grid.
8. Run the cluster report.

Each document is processed independently and you may be able to see the progress bar for each. When the documents are complete, they are merged together and then shown within the Document Viewer.

The documents are discrete within the Document Viewer. The page counter on the Tool Bar reflects the total number of pages in the cluster report, but each document's pages are numbered from 1 to the total number of pages in the document. Font settings, alignment, spacing, and grid lines are all unique to each document.

9. Move through the pages of the cluster report and you can see that each document is unique.

Letter, Label and Form documents will not include a Navigation Bar because a cluster report can include several different types of documents. The Cluster Report feature is

intended to provide an easy way of outputting several documents; it is not intended to be used for interactive purposes. In addition, the Output to Spreadsheet option is not available.

If you choose to print the cluster report, one stream of pages will be printed.

10. Close the **Document Viewer** and the **Cluster Reports** screen.
11. Close the **Explorer**.
12. Continue with the next tutorial.

Tutorial 11.3 – Freeform Reports

Freeform reports allow you to enter an SQL statement and a series of captions to create reports that you could not otherwise create. Normal use of this feature requires specific knowledge of SQL and internal knowledge of the People-Trak database. Such knowledge is beyond the scope of this tutorial, but we can show how the feature works and what you can do with it.

The Freeform Reports feature bypasses all field security. If a user is allowed to create a freeform report, they can access any field within People-Trak. For this reason, there are special security settings for the freeform reports feature. We'll explore these first.

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

On the General tab, there are two fields that control use of the Freeform Reports feature. The Create Freeform Reports field grants the ability to create these reports, and this is the ability that must be carefully used. If a user can create Freeform Reports, they can view virtually any information in People-Trak.

The Run Freeform Reports field grants the ability to run freeform reports, but not to create them. So, it is possible to have some users with appropriate clearance create reports that can then be run by other users. Of course, it is important that the reports that are given to other users do not contain protected information.

In order to see how these security settings work, we need to have the DEMO user not be an Administrator because an Administrator bypasses all security settings.

2. Clear the **Administrator** check box for the **DEMO** user.
3. Clear the **Create Freeform Reports** and **Run Freeform Reports** check boxes.
4. Close the **Security Setup** screen, saving your changes.
5. Open the **Documents** menu. Note that **Freeform Reports** is not listed as an option.
6. Return to **Security Setup** and select the **Create Freeform Reports** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.
7. Open the **Documents** menu. Note that **Freeform Reports** is now listed as an option. Select **Freeform Reports** and let's get started.
8. On the **File** menu, select **New Freeform Report** or on the Tool Bar, click **New Freeform Report**.

The Freeform Reports screen is displayed. This screen contains three tabs. The Specification tab is similar to the Adhoc Reports screen. The SQL Statement tab contains a single text box for entering the SQL statement. The Report Captions tab contains a grid for entering captions and formatting formulas.

9. In the **Document Name** field, enter **SQL Test Report**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.
10. On the **SQL Statement** tab, enter the following **SQL statement**.

Select Name_Last, Name_First from PMMain

11. Run the report.

Can't find the Run option? There is a good reason for this. You still have the Run Freeform Report check box cleared for your DEMO user in Security Setup. This means you cannot run Freeform reports. Let's change that.

12. Close the **Freeform Reports** screen, saving your changes. Close the **Explorer**.
13. Return to **Security Setup** and select the **Run Freeform Reports** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.
14. On the **Documents** menu, select **Freeform Reports**. Open your **SQL Test Report** document and then run it.

This report lists the last name and first name for each employee in the database. There was no restriction on companies, so all employees in all companies are listed. (SQL statements are a type of programming; they do what you tell them to do and nothing more.)

As you can see in the Document Viewer, there are no captions in the report. We can fix this.

15. Close the **Document Viewer**.
16. On the **Report Captions** tab, enter two **Captions: Last Name** and **First Name**.

The two fields on our report do not need any formatting, so we will leave the Format column blank.

17. Run the report again.

It should look much better with these captions.

18. Close the **Document Viewer**.

As indicated above, there is insufficient scope to teach SQL, but to whet your appetite to learn more on your own, we'll show a few other tricks.

19. On the **SQL Statement** tab, clear the existing SQL statement, and enter the following:

Select Avg(Age) from PMMain

This statement will calculate the average age of all employees.

20. Run the report.

You can see that there are two problems. First the caption is wrong and second, there are too many digits to the right of the decimal point. We can fix both.

21. Close the Document Viewer.
22. On the **Report Captions** tab, change the first **Caption** to **Average Age** and delete the second **Caption**. Set the **Format** column for the first row to **"#.00"**.

This will simplify the display to just two decimal places.

23. Run the report and you can see the fruits of your efforts.

The combination of SQL statements and People-Trak formatting capabilities can allow those with a working knowledge of SQL to create a very wide range of reports. In certain instances, your Support Representative will provide a Freeform Report solution for you should the two of you be unable to create the desired report with the Adhoc Reports tool.

24. Close the **Document Viewer**, the **Freeform Reports** screen and the **Explorer**.

Before we leave, we need to get DEMO set back to Administrator.

25. Return to **Security Setup** and select the **Administrator** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.

26. Continue with the next tutorial.

Tutorial 11.4 – Spanning

Now we are going to switch gears a bit and look at document properties that you have not yet learned about. The first one is document spanning where you can have documents span multiple companies at your discretion. Here is how you do it.

1. On the **Documents** menu, select **Adhoc Reports**.
2. Create a new **Adhoc Report** named **All Employees** and place it in any **Explorer Category** you desire. Leave the **Category** field set to **User**.
3. Leave the **Query** tab blank, but add two fields to the **Report Definition** tab: **Employee ID** and **Full Name**. Add a **Count** calculation on the **Full Name** field so that we can count the records.
4. Run the report and note the number of records that qualify.
5. Close the **Document Viewer** and the **Adhoc Reports** screen.

Your new report should be highlighted in the Explorer.

6. On the **File** menu, select **Adhoc Report Properties** or on the Tool Bar, click the **Adhoc Report Properties** button to display the properties for this document.

The Adhoc Report Properties screen is displayed for this document.

7. Click the **Spanning** tab.

This tab provides a grid in which to record the companies that are to be spanned. In this case, the grid is blank. When you ran the report, however, records were displayed and counted. Why? Because when there is no company specified, the report will be run for the current company only. Once you specify one or more companies, the report will be run for those companies regardless of which company is the current company.

8. Close the **Adhoc Report Properties** screen and close the **Explorer**.
9. Use what you already know to transfer the following three records from the **ACTIVE** company to the **ARCHIVE** company.

1017 Anna Belamonte
1019 Helen Pilsner
1020 Renee Watanabe

10. Close any open records to return to the **Organizer** desktop.
11. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company. Confirm that the three records have been transferred. Return to the **ACTIVE** company.
12. On the **Documents** menu, select **Adhoc Reports**.
13. Find and highlight the **All Employees** report you created earlier in this lesson. Run the report from the **Explorer**.

There should be three less records than there were before because we moved three

records from the **ACTIVE** company to the **ARCHIVE** company, and we are currently in the **ACTIVE** company.

14. Close the **Document Viewer** and the **Explorer**.
15. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company.
16. Open your report and run it again.

How many records are shown this time? There should be as many records as there are in the current company, which is the **ARCHIVE** company.

17. Close the **Document Viewer**.

You can also access the Adhoc Report Properties screen from within the screen for the report itself.

18. On the **Adhoc Reports** screen, use the **Adhoc Report Properties** option on the **File** menu or the **Adhoc Report Properties** button on the Tool Bar to display the **Adhoc Report Properties** screen.
19. Click the **Spanning** tab. On the first line in the grid, click the popup button to display a list of the available companies. Select the **ACTIVE** company. Close and save the changes to the properties.
20. Run the report again.

This time, how many records are shown? Even though we are currently in the **ARCHIVE** company, all of the records from the **ACTIVE** company are shown because that is what the spanning instructions state.

21. Open the **Adhoc Report Properties** screen again. On the **Spanning** tab, add the **ARCHIVE** company to the list of companies for our sample report. Close and save the properties.
22. Run the report again.

This time, all of the records in the **ACTIVE** and the **ARCHIVE** companies are shown. This will be true regardless of the company you are currently working in even if it is not one of the companies in the spanning list.

23. Finally, use the **Adhoc Report Properties** screen to remove both of the companies from the spanning list. Now, run the report again, and it will contain the employees from the current company only.
24. Close the **Document Viewer**, the **Adhoc Reports** screen and the **Explorer**.
25. Transfer the three employees from the **ARCHIVE** company back to the **ACTIVE** company.
26. Switch back to the **ACTIVE** company.

Spanning is only available to Administrators for security purposes, so when non-administrators run a document that spans, they will only see information for the current company and based on their given security.

27. Exit **People-Trak**.

28. This concludes this tutorial and lesson.