

Basics Series-4011

Notes, Attachments and Tables

Version 9.0

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Notes

Workbook

Notes

Each module provides a notes feature that allows you to record and track text-based notes and attach a variety of document types to the notes. You can attach Microsoft Word documents, Microsoft Excel spreadsheets, Adobe Acrobat PDFs, and virtually any other type of non-executable file.

Each primary data entry screen and sub screen in each module has a Category Notes button. When the Category Notes button is selected, the notes screen is opened and only notes assigned to that particular category can be viewed. For example, to view notes within the Personnel Management module that have been assigned to the Personal category, the Category Notes button would need to be selected from the primary Personal screen or any of the Personal sub screens.

The Notes screen includes the Note Details grid and the following buttons: Attach, Delete, Show and Scan.

Note: The Category Notes button can be turned off for a user by clearing the Notes check box in User Setup.

Note Details Grid

The individual notes are displayed in the Note Details grid. This grid contains the columns described below.

User

Indicates the User ID of the People-Trak user who created the note. This field is automatically assigned and is for display only.

Note Date

Indicates the date of the note. If you do not enter a note date, the date will be set to today's date.

Note Text

The text of the note. The first line of the note is initially displayed. If you wish to display or enter additional lines, use the multi-line editor popup button to display the entire text of the note.

Type

Indicates the type of file attached to this note, if any. If a note has an attachment, you can activate the attachment and start the product used to create or edit the attachment by clicking the Show Attachment button. For example, if you have attached a Microsoft Word document, the Type will be DOC or DOCX. You can then click the Show Attachment button, which will start Word and load the attached document.

Attachment Buttons

There are four attachment buttons available on the right hand side of the Notes screen. The Attach button is available once a note has been entered on the current row, and allows you to select the file to attach to the note. The Delete button is available when on a note that has an

attachment, and allows you to delete the attached file. The Show button is available when on a note that has an attachment, and allows you to show the attachment. The Scan button is available once a note has been entered on the current row, and allows you to utilize your own scanner to attach a scanned image.

All Categories Button

You can display the notes for all categories by selecting the All Notes button located on the right hand side of the Notes screen. All fields on the All Notes screen are display only and cannot be modified. Notes can be sorted by any column using standard grid conventions. Simply click on the grid header for the column on which you wish to sort. The note rows will then be sorted in that order. The Show button is available when on a note that has an attachment, and allows you to show the attachment.

Working With Notes

Viewing the Entire Text of the Note

To facilitate navigation and rapid viewing, notes are initially presented as single lines in the notes grid. You can move through the rows on the grid using standard grid navigation conventions. If you wish to view the entire text of any note, simply position the cursor to the desired row and click on the multi-line editor popup button. The entire text of the note is displayed in the multi-line editor and may be edited.

If you just viewed the note or made updates you want to save, click the OK button to return to the Notes screen. If you made updates to the note but do not want to save the changes, click Cancel.

Showing Notes for other Categories

When selecting the Category Notes button on primary and sub screens, the notes for the category associated with the primary screen are displayed. You can display and edit the notes for other categories by selecting the appropriate primary or sub screen and selecting the Category Notes button located on that screen.

Deleting Notes

Notes can be deleted using the Delete Row option, which is available on the Edit menu and on the Tool Bar. When the Delete Row option is used, the entire note including any attachment is deleted.

Sorting Notes

When notes are first displayed, the notes are displayed in descending order by note date. Notes can be sorted by other columns using standard grid conventions. Simply click on the grid header for the column on which you wish to sort. The note rows will then be sorted in that order. You can also order the notes in any random order using the Row Up and Row Down buttons on the Tool Bar. Like other grids, note rows are stored back into the database in the order in which you last sorted them

In addition, you will notice that when the sort order is changed in one category, the sort order persists for the rest of the categories. The primary reason for sorting notes is for viewing and printing purposes.

Printing Notes

You can print the list of currently displayed notes at any time using the Print button on the Tool Bar. If you wish to print a particular list of notes in a particular order, select the

appropriate category and sort the list the way you want. The note report will reflect the list as you see it.

Working with Attachments

People-Trak provides a unique feature that enables you to attach files to your note records. These files can be retrieved and viewed at any later time.

Attachments do not Use Linked Files

The files that you attach to People-Trak are not stored as linked files. With linked files, you simply store the name and path to the original file. If the file is moved, deleted, modified or lost, the link is no longer valid and the attachment is lost. In addition, linked files are not secure. A linked file that is located by any user can be opened and read at any time. Linked files are not a satisfactory method of storing attachments.

How Attachments are Stored

With People-Trak, there is one attachment file for each attachment and that attachment file is stored in the database. The attachment is a copy of the original file, so you are not dependent on the original file. If the original file is lost or deleted, you will always have the copy associated with the applicable note record. Should you wish to export the attachment out of the attachments file, you can do so using the “Save As” feature of the product.

Attaching a File

The process for attaching files is the same process regardless of whether you are attaching Word documents, Excel spreadsheets, image files, or any other type of file.

If the note to which you wish to attach a file does not yet exist, add the note. If the note does exist, select the desired note row.

You are allowed one attachment per note. An attachment can only be added if there is no existing attachment for that note.

When a file has been selected, internal processing for the attachment is performed. A copy of the file is made, and the file is compressed and moved into the attachment file for the current record. The type of file is then added to the Type column of the grid.

Activating Existing Attachments

When you have attached a file to a note, the Type column was updated to indicate the type of file attached to that note. You can activate the attachment and view it within the applicable product by clicking the Show Attachment button. The applicable product (Word, Excel, an image editor, Adobe Acrobat, etc.) will be loaded and the attachment will be displayed.

In order to activate an attachment and use the product with which it is associated, you must have that product or a related product installed and functional. For example, if one user has attached a Microsoft Word document and you wish to read that document as an attachment, you must have Microsoft Word or an equivalent installed and functional on your computer. The applicable product is determined by the file associations on your computer. If you have associated Word documents with another tool or product, that product can be used to open the attachment.

If you activate an attachment and modify the document within the associated product, the attachment will not automatically be put back into People-Trak. This is because the process that is editing the attachment works completely independently of People-Trak. That product does not know that you wish to move the modified attachment back into People-Trak. If you

wish to place a modified attachment back into the note record, you need to save the edited attachment to a file, delete the original attachment, and then attach the new file.

Deleting an Attachment

An existing attachment can be deleted from a note at any time. When an attachment is deleted, it is removed from People-Trak permanently. If you wish to export an attachment so that you can use it elsewhere, use the Export feature described in the next section. To delete an attachment, select the note with the attachment and click the Delete button. The attached file will be deleted from the database and the Type column for that note row will be cleared.

Exporting an Attachment

Files that have been attached to notes can be exported from the database for use with another product or for any other purpose. For example, if you have attached employee photographs and you wish to use them for an employee newsletter or an award, you might wish to export the image.

Notes and Attachments that Originate from Email

Notes and attachments can be automatically added from the Email feature.

The following fields on the Send Email screen are applicable for attachments.

To

The email address of the record that is to receive notes. When emails are sent in bulk, multiple email addresses can be listed. The email addresses are used to lookup the unique ID for the appropriate records so that the note can be added.

Subject

The subject of the email. The entry in this field is added as the first line of the note text in the formation shown below.

Email Subject: Subject

Template

If a template is being used, this is the name of the template. When the note is created, the template with appropriate field data merged becomes the text of the note. The template text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email.

Text

The text of the email becomes the text of the note. The email text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email.

Attachment 1

If a file is being attached to the email, the same attachment will be added to the note. This field contains the name of the file that will be attached to the notes.

Attachment 2

If a file is being attached to the email, the same attachment will be added to the note. This field contains the name of the file that will be attached to the notes.

Attach Document

If a document is being attached to the email, the same document will be added to the note. This field contains the name of the document that will be attached to the notes.

Note: If multiple attachments are added to an email, there will be a note added for each attachment.

Add Email to Notes

A check box that allows you to specify whether or not the email and any applicable attachment will be added to the notes. Select the check box to add a note to the record associated with each email address in the To field. Clear the field to not add a note to the records. This check box is defaulted to selected if the Add Email to Notes check box is selected for the current module in Module Setup.

Note: If you are in a module whose key record does not have an email address associated with it, the record cannot have a note attached to it. 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. Also, if one of the To recipients does not have a People-Trak record associated with it, such as in the case of a vendor, then no record exists to have a note attached to it.

Note Category

If the email is being sent to notes, this field determines the note category to which the note will be added. It is supported by the list of available categories. A note cannot be added unless a note category is specified. If the Add Email to Notes check box was defaulted to selected, this field is also defaulted to the category specified for the current module in Module Setup.

Tables

Tables are a key component of People-Trak. Some tables are “system” tables and are not modifiable. Typically, these are tables that have standard entries as required by the government. An example is the Ethnicity table. Most tables can be modified to meet the specific needs of your company. You can edit the tables in a module by choosing the Edit/Print Table option on the Tables menu.

Some tables are used in more than one module. For example, the City table is used in both the Personnel Management module and the Applicant Management module. There is one City table, so the table entries are the same for all modules that use it.

Table sharing allows you to have some tables shared by all companies while other tables are unique to the current company. For example, the City table would normally be shared if all the companies are in the same region while the Retirement table might be entirely unique. Likewise, the EEO codes would typically be shared by all companies while attendance accounts might not. Tables can only be set to either be shared by all companies or be unique to the current company. It is not possible to share a table for some companies and not for others. When you are implementing People-Trak, it is important to determine up front which tables are to be shared and which will be unique to each company.

Table Setup

Table Setup is used to specify the validation and sharing settings and view table settings such as the module it is associated with, the table type, and whether or not the table is mass

updatable. The settings in Table Setup are enterprise-wide, so if the City table is set to Optional validation, it has that setting in all modules and in all companies.

Table Validation

There are three validation rules for each table:

- None
- Optional
- Mandatory

No Validation

When table validation is set to None, any field that was supported by that table is no longer supported by that table. The underlying table is ignored and the popup button adjacent to the data entry field is not displayed. Turning off validation applies to all fields supported by the table. For example, there are multiple fields within Personnel Management supported by the City table. If you set validation to None, table support and validation is deactivated for every field supported by the City table.

Note: It is highly recommended that you do NOT set a table to None and then after all data entry is complete, set the table to Optional and then reverse-populate. This will merely result in bad tables and bad data entry practices.

Note: If you wish to deactivate table support for a single field without affecting other fields, do not use table validation for that feature. Instead, use the Field Customization feature to remove table support entirely from that field.

Optional Validation

When table validation is set to Optional, it is possible to key a value into the field that is not actually in the underlying table. This would be appropriate for fields such as cities, counties, or any other type of variable information. This would not be appropriate for fields such as departments, jobs, and status codes that are fixed.

When you key a value into a field using optional table validation and the value does match an entry in the table, the value is accepted. When the value does not match an entry in the table, the following message is displayed:

Entry is not in the table, Override Table?

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

Note: When an optional table entry is overridden, that entry is NOT moved into the table automatically. If you wish to move the entry into the table, you must use the table entry feature for that table.

Mandatory Validation

When table validation is set to Mandatory, it is NOT possible to key a value into a field that is not in the supporting table. If you try, the following message is displayed:

Entry is not in the table

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

Sharing Tables

The Share Table checkbox in Table Setup allows you to specify whether or not the table should be shared by all companies. Select the Share Table check box to share the table, or clear the check box to not share the table. Tables are defaulted to not being shared, so you will need to use the Table Setup process to set table sharing accordingly.

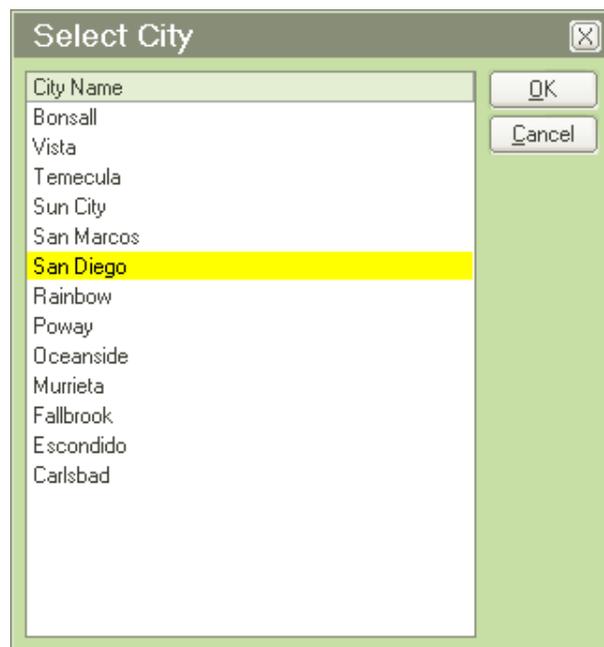
Only simple tables can be shared. Complex tables (such as Department) and very complex tables (such as Attendance Account) cannot be shared. Tables can only be set to either be shared by all companies or be unique to the current company. It is not possible to share a table for some companies and not for others.

Note: If a table is being shared, the Copy option on the File menu is not available, because this table is already shared by all companies; there is no reason to copy the table to another company. When a table within multiple modules is set to span, auto set selects spanning for all tables with the same name.

Simple Tables

The majority of the tables provided in People-Trak are “simple” tables. Simple tables support the data entry of a single field such as cities, counties, countries, etc.

The editing and maintenance of a simple table is a process of maintaining the entries in a single column grid. You can enter as many values as you want and you can delete or add to the list at any time. A screen sample for a typical simple table is shown below.



The operating conventions for the editing of simple tables are virtually identical to those used elsewhere in People-Trak.

Sorting a Simple Table

With a few exceptions, each of the tables can be sorted in alphabetic order by clicking on the column header. If the table is not sorted or is sorted in descending order, it will be sorted in ascending order. If the table is sorted in ascending order, it will be sorted in descending order.

In addition, you can sort the table in any random order using the Row Up and Row Down buttons on the Tool Bar.

Note: In some cases, you may not want to sort tables at all. The process of popping up a table and selecting an entry can be faster if the most commonly used entries are at the top of the list and not in alphabetic order.

Printing a Simple Table

A simple table can be printed while it is being edited using the Print Screen option on the File menu or the Print Screen button on the Tool Bar. It can also be printed from the main Maintain Tables screen by using the Print button. Both methods will print the same results.

Reverse-Populating a Simple Table

People-Trak provides a unique capability in simple tables to reverse-populate the entries in the table from the unique entries in the database tables. This feature is useful when data has been imported into the database from another source and that data has populated fields for which People-Trak has provided a table. For example, if you have imported city information from another source, the city fields in the database will be populated with data from that source. To populate the City table with these same values, you can use this feature.

To use this feature while editing a table, use the Populate Table option from the File menu. Using the City table as an example, this feature populates the City table with every unique city name from any city field used in the current module and company (all companies if sharing is set for the table). There will be no duplicates. Any existing city entries remain, and all the cities are sorted in alphabetic order.

Note: Use of this feature can lead to bad data entry habits. The primary purpose of tables is to assist in the correct and controlled data entry of the fields that are supported by these tables. If you enter data into the fields manually and then reverse-populate the table, no control of the data entry process will have been exhibited. Both the fields and the tables may contain errors. It is recommended that this feature be used with appropriate discretion. Because complex tables contain more than one field, this feature is not available with complex tables.

Complex Tables

Some tables contain more than a single field. For example, the Department table utilizes a multi-column grid to maintain the table. A sample is shown below.

The screenshot shows a software application window titled "Training Course". The interface includes a menu bar (File, Edit, Help) and a toolbar with various icons. Below the toolbar are three tabs: "Course Details", "Certifications", and "Competencies". The "Course Details" tab is selected. On the left side of the main content area, there is a vertical list box containing course codes from 108 to 107. The code "108" is highlighted in yellow. To the right of the list box is a form with several fields, each with a label and a value:

Course Code	108
Course Title	New Employee Orientation
Type	Mandatory
Source	Off-Site
CEU	1.11
Credits	2.22
Total Course Hours	3.33
Course Cost	4.44

Complex tables such as this have special operating conventions. Due to the large number of fields required to complete the table, it is necessary to clearly indicate which entry is actually being worked on as you move between the tabs and other screens. The technique used is the list box that is displayed to the left. This list box remains displayed on all tabs and highlights the current table entry. Regardless of which tab you are on, you are working on the table entry that is currently highlighted.

Selecting Items

You can select any item for editing at any time by clicking the item on the list box. If you have changes in process on the original item, the changes are saved before the second item is displayed. Except for the New and Delete features, you can change between items whenever you wish.

Adding a New Table Item

New items only can be added to the table using the New button on the Tool Bar or the New option on the File menu when you are positioned to the first tab. When an item is added, it is given a temporary code such as NEW1 or NEW2. It is assumed that you will modify the code to the desired value as you complete the remaining entries on the screens.

Deleting a Table Item

Existing items can only be deleted using the Delete option on the File menu. When an item is deleted, the entry is removed from the list box and all fields on the screen are cleared.

Changing the Code

Complex tables use a code to uniquely identify each entry in the table. The code must be unique. If you attempt to add a code that already exists or you attempt to change a code to one that already exists, you will receive a message that tells you cannot do so.

If you change a code successfully, the code is automatically updated in all related records immediately. This is because the link between the table entry and the records depends on the code. For example, if you have a job code initially coded as "100" and you change the job

code to “1000”, there would be no way to relate the table entry to the records because there would no longer be a table entry coded as “100”.

In larger databases, there can be a slight delay as the records are updated after a code change. This should be no longer than two or three seconds. In most cases, the update is transparent.

Sorting a Very Complex Table

Complex tables can be sorted using the Sort Table option on the File menu, which is only available when editing a very complex table. You can then put the table entries into any order you desire.

Printing a Very Complex Table

A very complex table can be printed while it is being edited using the Print Screen option on the File menu or the Print Screen button on the Tool Bar. Because a complex table’s screen has multiple tabs, only the current tab will be printed with the information for all tables. A very complex table can also be printed from the main Edit/Print Table screen by using the Print button. This method requires that you pick the fields you wish to print and then information for all the tables for those fields are printed.

Reverse-Populating a Very Complex Table

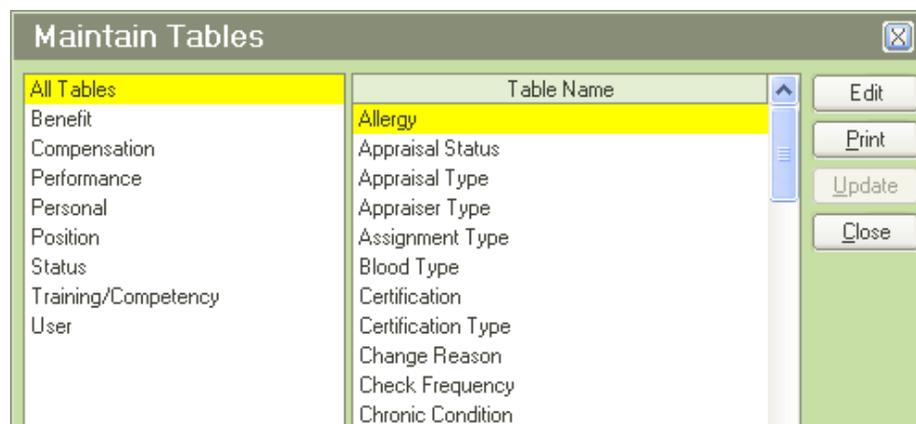
You cannot reverse-populate a very complex table because it is impossible to determine the values for all of the fields.

Benefit Administration Module and Attendance Account Table

The Benefit Programs defined in the Benefit Administration module work like the Attendance Account table in that the values in the table are returned to the employee record at fixed locations. For example, you might define five programs such as: Medical, Dental, Life, STD, and LTD. These programs will be the five programs in the employee record and cannot be edited there. If you add, delete or sort programs within the module, you need to use the Update Benefit Programs activity in the Benefit Administration module to have those changes reflected on the Benefit screens.

Editing Tables

To edit a table, use the Maintain Tables option on the Tools menu. The following screen is displayed.



In the category list on the left, select the category in which the table exists or select the All Tables category to display all tables. The tables for the selected category are shown on the right. To edit a table, either double-click on the desired table, or highlight the desired table

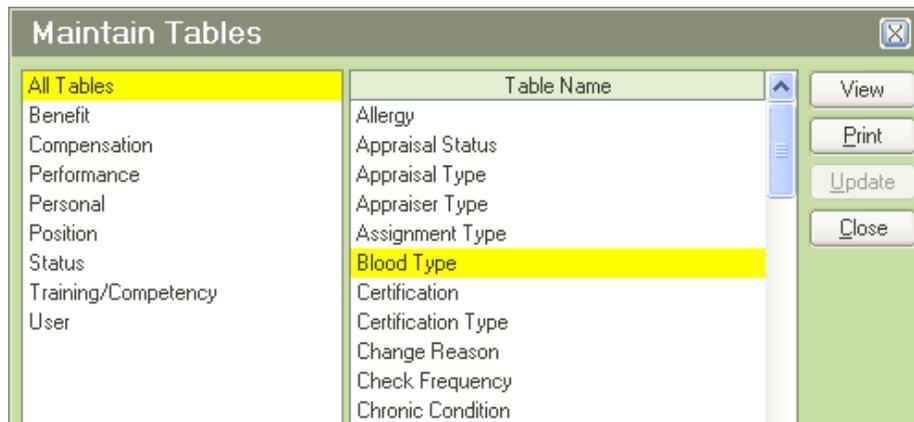
and click the Edit button. If you inadvertently reached this screen, click the Close button to exit the screen without making a selection.

Once a table has been selected, the appropriate screen to edit the table is displayed. Edit the table and save your changes.

Table Locks

People-Trak uses table locks in a multi-user environment. When a table is opened for editing, a lock is assigned to that table. The lock is the user name. The table locked cannot be opened for editing by any other user until the table is closed.

Viewing Tables



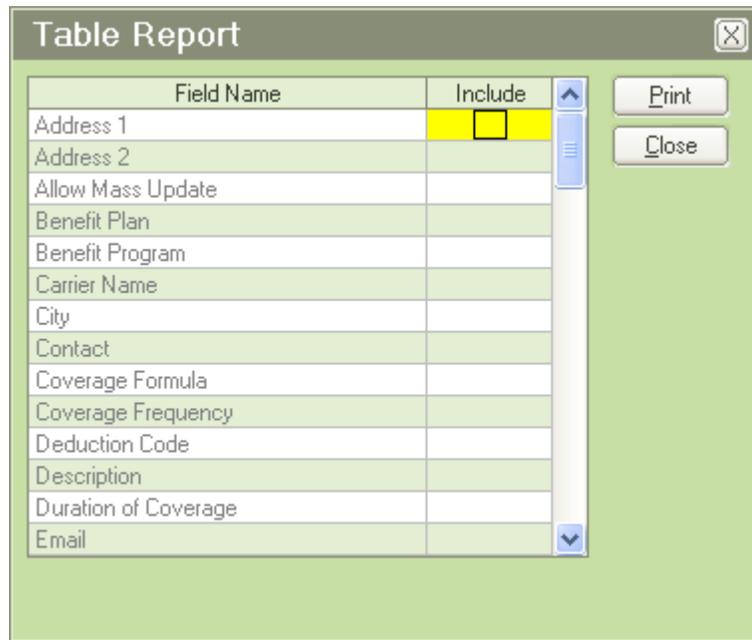
To view the contents of a non editable table, either double-click on the desired table, or highlight the desired table and click the View button. If you inadvertently reached this screen, click the Close button to exit the screen without making a selection.

Once a table has been selected, the table contents can be viewed, but are display only and cannot be modified.

Printing Tables

A table can be printed while it is being edited using the Print Screen option on the File menu or the Print Screen button on the Tool Bar. The table contents are printed as they are shown on the screen. This may or may not match what was most recently saved. To avoid confusion, an explicit save is performed when you print. This means that the contents of the screen are written to the database prior to printing. Because a complex table's screen has multiple tabs, only the current tab will be printed with the information for all tables.

A table can also be printed from the main Maintain Tables screen using the Print button. For simple and complex tables, the results are sent directly to the Document Viewer and are the same as using the Print Screen option when editing the table. For very complex tables, you must select the fields that you wish to print. A screen similar to the one shown below is displayed.



This screen is used to select the fields from the table you wish to print. You can select any combination of fields using the check box column. When you are ready to print, click the Print button and a report listing the selected fields will be produced. You can use this feature to print a different combination of fields from a specific table at any time.

Table Maps

A table map supports each table that returns more than one field into a record. Using the Map Table Fields utility, you can select which of the specified fields in the destination table are to be returned from the source table during data entry. For example, the Position to Employee table map returns all of the fields associated with that position when the position is assigned to an employee. If you choose not to have a mapped field returned to the employee record, you can clear the Enabled check box to not return that field.

When the fields from a table map are returned to a record, they are display only because People-Trak is shipped with all mapped fields flagged as Fixed Display Only. If you do not want certain fields returned from a table map, you will need to use the Map Table Fields utility to disable those fields from being returned and the Set Display-Only Attribute utility to clear the Fixed Display Only flag on those fields.

Table Mass Update

Complex tables as well as some of the very complex tables provide a mass update feature. This feature causes changes that you have made to the table to be “mass updated” to the records in the database. For example, if the manager in one of the departments changes, the table is changed to match. However, the names of managers in the corresponding employee records are wrong. The Table Mass Update feature is used to change the names of the managers in each record to match the name of the manager in the table. Many, but not all of the complex tables have this feature.

In a table that allows mass update, there will be a Mass Update column (on a complex table) or a check box (on a very complex table) for each entry. If you select the column or check box, changes to that table entry will be mass updated to the records that contain it whenever a mass update is done. In any given table, you can mass update some of the entries and not others.

It is important to understand that the mass update will not affect any history. In a grid-style field (such as in employee position history), only the topmost (current) value is updated.

The Table Mass Update feature can be activated in two ways. Whenever a table that supports mass update is changed, the prompt shown below is displayed when you exit the table.

This table supports mass updating and changes have been made.
Do you wish to mass update now?

If you decide not to mass update the table at that time or if you wish to mass update a table at any later date, you can use the Mass Update Table option on the Tables menu. When the Mass Update Table option is selected, a list of the tables that support the mass update feature is displayed. Simply select the table you wish to update.

As mentioned in the earlier section, a table map supports each table that returns more than one field into a record. The Mass Update Table process utilizes these table maps. The Map Update Fields process, which is found using the Utilities option on the Administration menu, allows the System Administrator to modify a table map. If fields in a table map have been disabled, those fields will not be mass updated.

Note: The Mass Update Table process can affect a large number of records and there is no undo capability. It is a good idea to make certain that you have a recent backup before mass updating tables.

Lesson 1

Notes and Attachments

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This lesson covers how to use the notes and attachments feature provided with People-Trak.

Tutorials

Adding and Deleting Notes: shows how to add and delete notes.

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

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

Opening an Attachment: demonstrates how to open an attachment file using the software product that was used to create the attachment.

Deleting an Attachment: shows how to delete an attachment that was added to a note.

Tutorial 1.1 – Adding and Deleting Notes

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

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

The Select Product Option screen is displayed.

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

3. Click **OK**

The Login screen is displayed.

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

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

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

The Personal screen is displayed. Notes within the Personal category are accessed by clicking the Category Notes button, which is the third button on the Category Bar. The Category Notes screen is available from virtually all of the primary data entry screens and sub screens in People-Trak.

Note: The Category Notes button can be turned off for a user by clearing the Notes check box in Security Setup.

7. Select a few of the primary screens and find the **Category Notes** button.
8. Return to the **Personal** screen and click the **Emergency** button.

The Emergency Contacts screen is displayed.

9. Find the **Category Notes** button. It is available here and on other sub screens as well.
10. Close the **Emergency Contacts** screen to return to the **Personal** screen. Click the **Category Notes** button.

The Notes for Personal Category screen is displayed with the notes in descending order by note date. As mentioned, the primary component on the screen is a grid, but this grid has some special features. The record for Donald Stern already has notes defined for the Personal category. Typically, you would add a new note by inserting a row at the top of the grid. For demonstration purposes let's see what happens when a note is added on the first blank row.

11. In the first blank row, click in the **Note Date** column.

You can enter today's date manually, click the Date popup button or use the Date Stamp feature. Let's use the Date Stamp feature.

12. Select **Cancel** to close the **Select Date** popup.
13. On the **Edit** menu, select **Date Stamp**.

Today's date is entered into the Note Date column.

Note: You can also invoke the Date Stamp feature by pressing F4. On a new note, if you add an attachment or enter the Note Text before entering the Note Date, the Note Date field automatically populates with today's date.

14. Press **ENTER** to leave the **Note Date** column.

The User column is automatically populated with the current user ID DEMO. The User is automatically assigned and is for display only.

15. In the **Note Text** column, enter the text **This is my first note** and press **ENTER**. The note is complete. If you want to enter a note for today's date, there is an even faster way to enter a note. Let's see how this works.
16. In the next blank row, click in the **Note Text** column and enter the text **This is my second note** and press **ENTER**.

The User and Note Date fields are defaulted for you and the note is done!

Now, let's see how to insert a row rather than just add a row at the bottom of the notes grid.

17. Click anywhere in the first row of the grid.
18. On the Tool Bar, click the **Insert Row** button to insert a row.

Note that the User field is completed just as before. Additionally, the Note Date is automatically populated with today's date. This time, let's enter a note longer than the one line we are shown. We could keep typing and have the note wrap or we could use the multi-line editor. Let's try the multi-line editor, which allows you to see all the text you are entering.

19. In the **Note Text** column, click the popup button to open the multi-line editor.

A Simple Editor screen is displayed. You can now type away for as long as you like. If you reach the end of the line, word-wrap will be performed and the cursor will jump to the next line. If you press **ENTER**, the current line will be broken and the cursor will jump to a new line. Try these now.

20. Type a sentence or paragraph that wraps. Then on the second line, press **ENTER** to start another new line. Add a few more lines with the **ENTER** key and make a nice long note.
21. When you are finished with your note, click **OK** to close the editor.

Only the first line of your note is displayed in the grid. If you wish to review the text of your note or to add more text, click the popup button to expand the note text area and view or edit the text.

The Notes screen has been designed to allow you to rapidly view the first line of each note relative to the other notes. If you wish to review the note in more detail (if the note has more detail), you need only click the popup button. In fact, you can actually browse your notes with the mouse. Try this.

22. Click in the **Note Text** column of the first row.
23. Open the editor, read the note text, close the editor. Click on the next line.
Open the editor, read the note text, close the editor. Click on the next line.
Open the editor, read the note text, close the editor.

You can use this technique to rapidly browse all notes for any record.

Now that we know how to add notes, let's see how to delete notes.

24. Click anywhere in the first row of the grid.
25. On the Tool Bar, click the **Delete Row** button to delete the current note.
26. Use **Delete Row** to delete the other notes you entered.
27. Close the **Notes for Personal Category** screen, saving your changes.
28. Continue with the next tutorial.

Tutorial 1.2 – Working with Categories

When we entered the notes in the last tutorial, the note category was the category of the screen from which the Category Notes button was clicked. Each primary data entry screen in People-Trak has a screen category associated with it.

1. In the **Screen** dropdown, select **Status**.
2. On the **Category Bar**, click the **Category Notes** button.

Unlike the Personal category, there are no Status notes for Donald Stern.

3. Enter a note using the techniques you just learned.
4. Close the **Notes for Status Category** screen, saving your changes.

Try a few other screens and their Category Notes buttons. Some categories may contain notes and others may not. If you would like to see the notes within a record, you can do so by selecting the All Notes button.

5. Select the **Personal** screen, and select the **Category Notes** button.
6. Select the **All Notes** button located to the right of the notes grid.

The All Notes screen is displayed. This screen is mainly used viewing and printing purposes, so all fields are display only and cannot be modified. You may have also noticed a Note Category column header listing the categories from which the notes came from.

In addition, this particular grid shares the standard operating conventions of other grids in People-Trak. This means that you can sort the grid using any of the column headers. We can demonstrate this by sorting our notes by category.

Note: Grid sorting can be turned off for a user by clearing the Grid Sorting check box in Security Setup.

7. Click the **Note Category** column header.

The grid is now sorted by category in ascending order.

Try selecting the different column headers to sort the notes in other ways.

These same sorting conventions also work within the category note screens. Let's take a look at how they work for the Notes for Personal Category.

8. Close the **All Notes** screen.
9. On the **Notes for Personal Category** screen, click the **Note Date** column header.

The grid is now sorted by date in ascending order.

Like other grids, note rows remain sorted in the most recently sorted order.

10. Close the **Notes for Personal Category** screen and open it back up again.

The grid is still sorted by ascending note date within that category.

Like in other grids, you can also order the notes in any random order using the Row Up and Row Down buttons on the Tool Bar.

11. Go ahead and use the **Row Up** and **Row Down** buttons to change the order of the notes.
12. Close the **Notes for Personal Category** screen, saving your changes and stay in Donald's record.
13. Continue with the next tutorial.

Tutorial 1.3 – Attaching a File

One of the more powerful features of the Notes screen is the ability to attach external files to your notes. These external files become an integral part of the record. Attachments can be added to any note. Let's add a note and then add an attachment to it.

1. In the **Screen** dropdown, select **Status** and select the **Category Notes** button.
2. Enter a new note and stay on that note row.
3. Select the **Attach** button located to the right of the notes grid.

This option displays the Select File screen that is used to select a file. We have created a simple Word doc that you can now attach to this note.

4. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the **ATTACHMENT TIP.DOC** file.

Internal processing for the attachment is performed. The Type column is updated with **DOC**, indicating that a DOC type file is attached to that note.

In the Note Text field, you would typically want to add a short description of the file attached so that you can readily identify the attachment without having to open it.

5. In the **Note Text** field, add the following to your existing note and do not press **ENTER** so you stay on this note row:

This note contains an attachment that includes a valuable tip on attachments.

6. Continue with the next tutorial.

Tutorial 1.4 – Opening an Attachment

Once a file has been attached to a note, the file can be opened for viewing at any time.

1. Verify that the cursor is positioned to the note row containing the file you attached in the last tutorial.
2. Select the **Show** button located to the right of the notes grid.

The software associated with the DOC extension, typically Microsoft Word, is fired up and the attachment is loaded. This document is a copy of the original document and is stored in the ATTACH file under the appropriate enterprise folder.

Note: The attached file is intended to be for display only. If the attached file needs to be modified, do so outside of People-Trak. You will then need to delete the current attachment from the note and attach the appropriate file.

3. Close the attachment after reading the tip.

If you attach a file from a software product that you use, another user can only activate that attachment if the user also has that software product. For example, if you attach a word processing file (as we just did) from your word processor and another user has a different word processor, the other user might not be able to view the attachment. The Attachments feature is a very powerful feature, but it must be used with appropriate discretion. If your organization has standard word processors, spreadsheets, and other software products, there will be no problem.

4. Continue with the next tutorial.

Tutorial 1.5 – Deleting an Attachment

If a file has been attached to a note, you may need to delete it because it was attached in error or you need to attach an updated file to the note. Let's delete the attachment you added to the note.

1. Verify that the cursor is still positioned to the note row containing the file you attached in the last tutorial.
2. Select the **Delete** button located to the right of the notes grid

The Type column is cleared, showing that the attachment is now deleted from that note. If you had another file to attach to this note, you could do so now.

3. Close the **Notes for Status Category** screen, without saving.
4. Close the employee record, without saving.
5. This concludes this tutorial and lesson.

Notes

Lesson 2

Table Setup

Lesson Contents

Tutorial 2.1 – Specify Table Validation	26
Tutorial 2.2 – Allow Table Sharing	29
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This lesson covers key settings in the Table Setup process.

Tutorials

Specify Table Validation: shows how to specify table validation and how that validation then works.

Allow Table Sharing: demonstrates how to allow table sharing across companies.

Copy a Table: shows how to copy a table to another company.

Tutorial 2.1 – Specify Table Validation

There are three validation rules for each table:

- None
- Optional
- Mandatory

In this tutorial, we will learn how each of these validation rules work.

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

The Table Setup screen is displayed and includes a list of all of the tables in all modules.

The Module, Table Type and Mass Update columns are for informational purposes only. As you learned in the Intro to PT training, there are three types of tables: Simple, Complex and Very Complex. The Mass Update column allows you to see if a table is mass updatable or not. You will learn more about table mass update in later training, but it basically takes changes you have made in a complex or very complex table and updates current (not historical) data in records in the database. For example, if the manager of a department changes, the records for all of the employees currently in that department would be updated to have that new manager name.

As for the settings you can update in this process, we are going to be looking at the Validation column in this tutorial and the Sharing column in the next.

2. In the **Validation** column for the **City** table within the **Personnel Management** module, click the popup button and select **None** from the list.
3. Close the **Table Setup** screen, saving your changes.
4. Open **Donald Stern's** record.
5. In the **City** field, press **F1** to display the **Field Name: City** help screen. Take a look at the **Properties and Attributes** frame.

The Support Table for this field is the City table we just modified.

6. Close the **Field Name: City** screen.

There is no popup button on this City field because validation of None means there is no longer table support on this field.

7. Enter whatever you want in the field and press **ENTER**.

Your entry was taken because there is no validation on this field.

8. Click the **Emergency** button, which takes you to the **Emergency Contacts** sub screen.
9. In the **City** field for **Contact 1**, press **F1**.

The Support Table for this field is also the City table.

10. Close the **Field Name: City** screen.

There is no popup button on this field because the validation of None on the City table applies here also.

Note: As you can see, when you change a table, you might be affecting several fields across modules. If you wish to deactivate table support for a single field without affecting other fields, do not use table validation. Instead, use the Screen/Field Customization feature to remove table support entirely from that field.

11. Close **Donald Stern's** record.
12. On the **Setup** menu, select **Table Setup**.
13. In the **Validation** column for the **City** table within the **Personnel Management** module, click the popup button and select **Mandatory** from the list.

We are going from one extreme (no validation) to the other (mandatory validation).

14. Close the **Table Setup** screen, saving your changes.
15. Open **Donald Stern's** record.
16. In the **City** field, click the popup button that is now adjacent to the field.

The Select City screen is displayed listing all of the entries in the **City** table.

17. Click **Cancel** to exit the screen without making a selection.
18. Try entering **Funkytown** in the **City** field.

The following message is displayed:

Entry is not in the table

19. Click **OK**.

Your entry of Funkytown is cleared and the value before your change is restored. You can only enter a value in the City field that exists in the City table. No other values are allowed.

20. Close **Donald Stern's** record.
21. Select the **Table Setup** option again.
22. In the **Validation** column for the **City** table within the **Personnel Management** module, click the popup button and select **Optional** from the list.
23. Close the **Table Setup** screen, saving your changes.
24. Open **Donald Stern's** record.
25. In the **City** field, click the popup button.

The Select City screen is displayed listing all of the entries in the City table.

26. Click **Cancel** to exit the screen without making a selection.

27. Once again, try entering **Funkytown** in the **City** field.

The following message is displayed:

Entry is not in the table, Override Table?

28. Click **No**.

Your entry is discarded and the prior value is restored.

29. Enter **Funkytown** in the **City** field again.

The same message is displayed.

30. This time click **Yes**.

Your entry is accepted.

31. In the **City** field again, click the popup button.

You don't see your Funkytown entry, do you? When an optional table entry overrides the table, that entry is not moved into the table automatically. If you wish to move the entry into the table, you must use the table entry feature for that table.

32. Close **Donald Stern's** record, without saving your changes.

33. Continue with the next tutorial.

Tutorial 2.2 – Allow Table Sharing

Table sharing allows you to have some tables shared by all companies while other tables are unique to the current company. For example, the City table might normally be shared if all the companies are in the same region but not shared otherwise. When you are implementing People-Trak, it is important to determine up front which tables are to be shared and which will be unique to each company.

Only simple tables can be shared. Complex tables (such as Department) and very complex tables (such as Attendance Account) cannot be shared.

Tables can only be set to either be shared by all companies or be unique to the current company. It is not possible to share a table for some companies and not for others.

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

The Table Setup screen is displayed.

2. Scroll through the tables and look at the **Share Table** check box for each.

None of them is selected. This is because People-Trak is installed with all tables set to not be shared by all companies. That means that entries in a table will be unique to the company.

3. Close the **Table Setup** screen and we'll demonstrate this fact.

4. On the **Tools** menu, select **Maintain Tables** to display a list of the available tables.

Let's assume that we have companies in different regions, so we want the City table to be unique to each company.

5. Select the **City** table and click **Edit**.

Note that there is no city named Whoville.

6. Close the **City** table and close the **Maintain Tables** screen.

7. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company.

8. Now open the **City** table for editing again.

The table is blank. That is because the City table is not shared with the **ACTIVE** company. The cities listed for the **ACTIVE** company are not applicable to the **ARCHIVE** company.

9. Add a city named **Whoville** to the table. Close and save the table. Close the **Maintain Tables** screen.

10. Use the **Select Company** process to return to the **ACTIVE** company.

11. Open the **City** table.

Once again, Whoville is not listed. That's because Whoville is associated with the **ARCHIVE** company and not the **ACTIVE** company.

12. Close the **City** table and the **Maintain Tables** screen.

13. Open **Donald Stern's** record for editing.

14. In the **City** field, click the popup button to display a list of the available cities.

This list will be identical to the list defined for the ACTIVE company and Whoville is not listed. If we were to change companies back to the ARCHIVE company and then displayed a list of the available cities at any City field, the list would contain only Whoville.

15. Close **Donald Stern's** record.

We just saw how tables work when they are not shared. Now, let's share a table and see how that works.

16. Use the **Select Company** process to return to the **ARCHIVE** company.

17. Now open the **County** table for editing.

It is empty because the table is not being shared and there are no entries for this company yet. Even though the ACTIVE company has entries, the ARCHIVE company does not.

18. Close the table and the **Maintain Tables** screen.

19. On the **Setup** menu, select **Table Setup**.

The settings in Table Setup are enterprise-wide, so if the County table is set for sharing while in the ARCHIVE company, it has that setting in all companies. We could have gone to the ACTIVE company and changed this setting, and it would have had the same effect.

20. For the **County** table, in the **Personnel Management** module, select the **Share Table** check box to activate sharing.

Note that sharing has also been activated for the County table in the other modules as well.

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

22. Open the **County** table for editing.

The County table here in the ARCHIVE company now has the same entries as the ACTIVE company because this table is now shared by all companies.

23. Add an entry to this **County** table with any **County Name** you want.

24. Close the **County** table, saving your changes.

25. Close the **Maintain Tables** screen.

26. Use the **Select Company** table to switch to the **ACTIVE** company.

27. Open the **County** table for editing.

You will see your entry while in the ACTIVE company as well. Remember, there is one table that is being shared by all companies now.

28. Go ahead and delete the entry you made.

29. Close the **County** table, saving your change.

The County table is now updated and the same for all companies.

30. Close the **Maintain Tables** screen.

31. Continue with the next tutorial.

Tutorial 2.3 – Copy a Table

In the previous tutorial, we said that we were not going to share the City table because our companies were in different regions. But what if you have two companies in which you would like to have identical (or at least similar) entries, what can you do? You can't share the table because that table would be the same in all companies. What you can do is get the table entries the way you want in one of the companies and then copy that table to the other company. Let's give this a try.

1. On the **Setup** menu, select **Table Setup**.
2. Select the **City** table for the **Personnel Management** module.
3. On the **File** menu, select **Copy Table to Company**.

The Select Company screen is displayed.

4. Select the **ARCHIVE** company.

The City table entries for the ACTIVE company are copied to the City table in the ARCHIVE company. Let's go verify this.

5. Use the **Select Company** process to switch to the **ARCHIVE** company.

Before we take a peek at the City table, remember from the last tutorial that we only had Whoville in the ARCHIVE company's City table.

6. Open the **City** table for editing.

Voila! The entries from the ACTIVE company are now over here. Whoville is no more because the Copy option clears any entries in the "to" table before the copy is done. If you did want unique entries in this table for this company, you could enter them now; since this table is not shared, you are only affecting the table entries for this company.

7. Close the **City** table and the **Maintain Tables** screen.
8. Switch back to the **ACTIVE** company.
9. This concludes this tutorial and lesson

Lesson 3

Maintaining Tables

Lesson Contents

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This lesson covers how to maintain both simple and complex tables as well as how to print tables. It also covers the reverse population of a table and the mass update of a table to the database.

Tutorials

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

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

Print a Table: shows how to print a table two different ways.

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

Mass Update a Table: demonstrates how to mass update a complex table to the records in the database affected by that table.

Tutorial 3.1 – Edit a Simple Table

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

1. On the **Tools** menu, select **Maintain Tables**.

The Maintain Tables screen is displayed, which has a list of categories on the left side and a list of the tables in the selected category on the right side. The All Tables category is initially selected and a list of all the tables in the current module to which you have access is presented in alphabetic order on the right.

2. Highlight the **City** table and click **Edit** (or just double-click on **City**) to begin editing that table.

The City table is a typical single field table. The City table uses standard grid conventions. For example, you can insert rows, delete rows and sort rows.

3. Try inserting, deleting, moving and sorting rows now.

Note that the sort function within tables assumes ascending order, but a simple click on the City Name heading will change the sort to descending if you prefer. The order of the entries you see here is what you will see when you use the popup button on a field that is supported by this table. You can move the most commonly used entries to the top, if you choose.

4. In the first blank row, make an entry.

All of the field edit conventions are identical to those you have seen before.

5. Select some of the text you just entered and try using cut and paste.
6. On the **File** menu, click **Exit** to exit the table.

This will save your changes, but not to worry, we will be cleaning up the City table in the next tutorial.

7. Edit the **Department** table.

This Department table functions identically to the City table except that there are multiple fields in each row. The Department table is an example of a complex table.

8. Exit the **Department** table.
9. Continue with the next tutorial.

Tutorial 3.2 – Reverse Populate a Table

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

1. Edit the **City** table.
2. On the Tool Bar, click the **Delete Row** button to delete all of the existing rows.
3. On the **File** menu, select **Populate Table**.

The following message is displayed:

This option will populate the table with unique entries from all related fields for the current company. Do you wish to continue?

4. Click **Yes** to populate the table.

The table is then populated with every unique city name from any city field used in the current module and company (all companies if sharing is set for the table). There will be no duplicates.

Note: When we set this table up, we cleared the table prior to populating. This is not necessary, but was used for demonstration purposes. If there are unique entries in the table when the populate option is selected, the unique entries will remain. Let's try it.

5. Clear the table again.
6. Then add three unique city names such as **XXX**, **YYY**, and **ZZZ**.
7. On the Tool Bar, click the **Save** button.
8. On the **File** menu, select **Populate Table** and click **Yes**.

Note that the new values from the existing records are added to the unique records in the table and that all of the records are sorted in ascending order. Our "X", "Y" and "Z" cities will be at the bottom.

Note: The populate feature should be used carefully as it can lead to bad data entry habits. Do not run this feature regularly on the same table so that the table will match the fields in the records. That is exactly the opposite of what you want. Your tables are used to ensure proper validation of the data that is entered into the records.

This feature is only available on the simple tables. You cannot populate complex or very complex tables in this manner.

9. Use the **Delete Row** button to delete the **XXX**, **YYY** and **ZZZ** entries. Stay in the **City** table.
10. Continue with the next tutorial.

Tutorial 3.3 – Print a Table

There are two ways to print tables. You can print the table while you are editing it, or you can print the table from the Maintain Tables screen. We'll do both.

1. You should still be editing the **City** table.
2. On the Tool Bar, click the **Print Screen** button to print the screen.

You have effectively printed the City screen, which is the same as printing the City table. This is because the City table is a simple table. The difference between printing a table's screen versus printing a complete table will be more evident when looking at complex tables in just a bit.

3. Close the **Document Viewer**.

Now let's print the table the other way.

4. Close the **City** table.

The City table should still be highlighted in the table list on the Edit/Print Table screen.

5. Click the **Print** button.

The table is printed directly from the Maintain Tables screen and the contents are the same as the table printed from within the editing screen.

As mentioned earlier, the City table is an example of a simple table. Let's print a complex table.

6. Close the **Document Viewer**.
7. Now edit the **Training Course** table.

As you can see, this table is a lot more complex. In the next tutorial, you will learn more about these kinds of tables. For now, we are just going to print one.

First, let's see what printing the table does.

8. On the Tool Bar, click the **Print Screen** button to print the screen.

The information on all of the tabs for the selected entry of the Training Course table is printed. The key here is that only the information for the selected entry is printed. The information for all of the entries was not printed.

Now, let's use the Print option on the main screen and see the difference.

9. Close the **Document Viewer** and close the **Training Course** table.

The Training Course table should still be highlighted in the table list on the Maintain Tables screen.

10. Click the **Print** button.

The Table Report screen is displayed. Since there are so many fields of information in complex tables, you are required to choose what information you would like to see.

11. Select the check boxes for any five fields and then click the **Print** button.

A report is generated that includes those five fields for all table entries. You can see that the print options generate different results for complex tables.

12. Close the **Document Viewer**, close the **Table Report** screen, and then close the **Maintain Tables** screen.
13. Continue with the next tutorial.

Tutorial 3.4 – Working with a Very Complex Table

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

1. On the **Tools** menu, select **Maintain Tables** and then edit the **Location** table.

The Location table is one of the “simpler” very complex tables and is a good table for demonstration. All of the very complex tables provide a list box that contains the existing table codes and either one or more tabs to maintain the information. The Location table has just one tab.

The list box on the left is used to select one of the codes for editing. When the screen is first displayed, the first code is automatically selected for you.

2. Select a different code and note that the fields are refreshed for that code.
3. Change one of the values for the code you have selected and then select another code.

The change you made is saved when you moved to the other code just like changes are saved on the primary data entry screens when you move between records.

When there are multiple tabs of information, the list box is displayed on each tab so that you can see which code is being edited. You can move between the tabs changing any of the information associated with the code. The changes are saved when you change to another code or exit the table.

With complex tables you cannot insert a row when you wish to create a new entry because there is no grid. Instead, there is a New Location (or New Department, New Division, etc.) button on the Tool Bar and a New Location option on the File menu. When this feature is used, a blank record is added to the table and is given a temporary code such as NEW1, NEW2, etc.

4. On the Tool Bar, click the **New Location** button to add a new location.

The location code NEW1 is added to the list box and is placed into the Location Code field. Normally, you would continue adding the information for this location by changing the code to a valid name and by completing the remaining fields as necessary. At this point, the new location has been added; you are actually editing a blank record.

We just added a new record to a table. Now, let’s learn how to delete it.

5. On the **File** menu, select **Delete Location** or on the Tool Bar click the Delete Location button to delete the NEW1 location.

The following message is displayed:

Delete the highlighted table item?

6. Click **Yes**.

Once the record has been deleted, the next record in the list box is automatically selected.

You can also sort very complex tables, but since there is no grid, you can't sort these tables like the simpler ones.

7. On the **File** menu, select **Sort Locations**.

The Sort Locations screen is displayed.

8. Click the **Row Down** button to move the first location down to the second entry.
9. Click **Apply**.

The locations are now sorted in the order you wanted. When you go to the field supported by this table and use the popup button, the entries will be in this order.

10. Close the **Location** table, and click **No** when asked about mass updating.
11. Stay in the **Maintain Tables** screen for the next tutorial.

Some of the other complex tables are more complex in that they have more tabs and even sub screens and buttons. However, the operating conventions match those used elsewhere. You need only apply the knowledge you have already acquired.

12. Continue with the next tutorial.

Tutorial 3.5 – Mass Update a Table

Complex tables as well as some of the very complex tables provide a mass update feature. This feature causes changes that you have made to the table to be “mass updated” to the records in the database. For example, if the manager in one of the departments changes, the table is changed to match. However, the names of managers in the corresponding employee records are wrong. The Table Mass Update feature is used to change the names of the current managers in each record to match the name of the manager in the table. Many, but not all of the complex tables have this feature. In a table that allows mass update, there will be a Mass Update column (on a complex table) or a check box (on a very complex table) for each entry. If you select the column or check box, changes to that table entry will be mass updated to the records that contain it whenever a mass update is done.

It is important to understand that the mass update will not affect any history. In a grid-style field (such as in employee position history), only the topmost (current) value is updated. The fields to be updated by mass update are determined by that table’s mapping, which can be changed using the Map Table Fields utility.

Note: The Mass Update Table process can affect a large number of records and there is no undo capability. It is highly recommended that you perform a backup before mass updating tables.

1. You should still be in the **Maintain Tables** screen. Edit the **Department** table.

The Department table is displayed and the Mass Update column is selected for all of the codes. If you wanted to mass update some codes and not others, you can easily clear the check box for the codes you do not want to mass update. We want to mass update changes to any department, so we will leave that column as is.

2. Change the **Manager** for Department **600** from **Rhoda E. Tyrell** to **Frank W. Adams**.

Note: You will need to use the popup button to make this change. You cannot type the name directly into the field because it is expecting the employee number.

3. Close and save the **Department** table.

The following message is displayed:

This table supports mass updating and changes have been made.
Do you wish to mass update now? Yes or No

4. Click **No** for now.

We want to take a look at an employee in Department 600 and see how the manager has not changed there yet. Normally, you would want to answer “Yes” to this question when changing table data.

5. Close the **Maintain Tables** screen.
6. Open **Donald Stern’s** record.
7. In the **Screen** dropdown, select the **Position** screen.
8. Click anywhere in the first row of the **Position History** grid, and then click the **Organization: 1** button.

Note that the Department 600 Manager is still Rhoda E. Tyrell.

9. Close **Donald's** record.
10. On the **Tools** menu, select **Maintain Tables**.
11. Select **Department** from the list of tables and click **Update**.

The following message is displayed:

Table Mass Update Complete

12. Click **Close** to close the **Maintain Tables** screen.
13. Go back into **Donald Stern's** record.
14. In the **Screen** dropdown, select the **Position** screen.
15. Click anywhere in the first row of the **Position History** grid, and then click the **Organization: 1** button.

Note that the Department 600 Manager is now Frank W. Adams, which matches the Department table.

16. Close **Donald's** record.

Let's set the Department 600 Manager back to Ms. Tyrell.

17. On the **Tools** menu, select **Maintain Tables** and then edit the **Department** table.
18. Change the **Manager** for Department **600** back to **Rhoda E. Tyrell**.
19. Close and save the **Department** table.

The following message is displayed:

This table supports mass updating and changes have been made.
Do you wish to mass update now? Yes or No

20. This time, click **Yes**.

All employees currently in department 600 will now have the Manager field for that department updated to be Rhoda E. Tyrell in their employee record.

21. Click **OK**.
22. Close the **Maintain Tables** screen.
23. Exit **People-Trak**.
24. This concludes this tutorial and lesson.