

Setup Series-6001

Desktop and User Setup

Version 9.0

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Workbook

Desktop Setup

The Desktop Setup process on the Setup menu allows you to specify for each user type the settings necessary to create the screen used to log into People-Trak and to create the desktops. The desktop settings affect some of the “look” of the desktops, but most of the content of the desktops are defined in Company Setup and User Setup.

The Desktop Setup screen uses several tabs to record and maintain setup information for the Login screen and desktops. The available user types are listed on the left.

Login Settings Tab

The Login Settings tab is used to specify key settings needed for the Login screen.

Each of the fields on this tab is used to specify what a certain part of the Login screen will look like or what text it will contain. This includes the Login Caption, Login Welcome Text, and the Login Image.

Desktop Tab

The Desktop tab is used to specify key settings needed for the desktops. Overall settings include the color scheme, desktop alignment, and maintaining the color scheme. Web settings include the default web page width, client height, choosing to use a custom header, the web header height, and the heading logo image. The Use Whole Screen checkbox on this tab allows you to expand the background form and fill the entire monitor. Clear the check box for the background image to remain the fixed size.

Note: Since this feature is at the desktop level, if the setting is set for a certain user type, all users of that type get the desktop.

Logos and Header Tab

The Logos and Header tab is used to select the logos and specify the header settings for the enterprise. These settings are listed and defined below.

- Document Logo
- Heading Logo
- Enterprise Header Only
- Include Header Text
- Header Text Alignment

The Document Logo field is supported by the Select Image popup so the appropriate image can be selected and the Clear Image popup so an existing image can be cleared. The dimensions of this image are 206 pixels wide by 74 pixels high.

Heading Logo field is supported by the Select Image popup so the appropriate image can be selected and the Clear Image popup so an existing image can be cleared. The dimensions of this image are 1040 pixels wide by 80 pixels high.

Note: If the image itself is not as big as the dimensions provided, it is important that it be sized big enough (using white space for example) to accommodate the placement of header text if that option is being used. Otherwise, the header text will not be visible.

The Enterprise Header Only check box allows you to specify whether or not to use the enterprise header for the desktops in addition to the Login screen. Select the check box to only use the enterprise header; this means that the company logo and name will not be used in the desktop headers. Clear the check box to use the enterprise header on the Login screen and the company header on the desktops.

The Include Header check box allows you to specify whether or not you want the header text included in the header of the Login screen and desktops. Select the check box to include the header text in the header. Clear the check box to not include any header text in the header.

The Header Text alignment field is used to select the alignment used for the header text. This field is supported by the Select Position popup. If the Include Header Text check box is not selected, which means the header text is not even shown, this alignment is irrelevant.

Additional settings on this tab include the name, style, size, and color of the font to be used for the header text.

Organizer Tab

The Organizer tab is used to specify what modules are active in the modules pane of the Organizer desktop.

Tasks Tab

The Desktop Tasks tab is used to define the default desktop tasks for the selected user type. These tasks can then be used to populate the tasks for individual users within User Setup.

Tasks from all modules are available for inclusion in this list of desktop tasks. This allows the user to easily access any tasks, without needing to switch modules or find the options on menus.

Multi-User Environment

People-Trak is a multi-user product. You can define almost any number of individual users, and they can access People-Trak simultaneously. It is very important that each user have a unique user ID.

By design, the System Administrator is the only person who should be performing User Setup. It provides access to all user profiles and has no internal security. If a user can access this menu item, the user can add, delete, and modify users at will.

User Types

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

People-Trak supports the following user types:

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

The HR user type is the only one available in the base People-Trak Essential HR product. The Employee, Manager, and Ex-Employee user types are added when Self Service

Employee/Manager has been implemented. The Applicant and Visitors are added with the implementation of Self Service Recruiting.

User Setup

The Desktop Setup process on the Setup menu allows you to specify for each user type the settings necessary to create the screen used to log into People-Trak and to create the desktops. The desktop settings affect some of the “look” of the desktops, but most of the content of the desktops are defined in User Setup.

The User Setup screen uses six tabs to record and maintain key user information, setups and defaults.

Login Tab

The Login tab is used to specify ID and status settings. These settings are listed and defined below.

- User ID
- Password
- User Type
- User Active
- Last PW Change
- Grace Logins Used
- Password Question
- Password Answer

The User ID is a unique phrase that identifies the user. Many organizations standardize user IDs in one of two formats. The first format is the first initial of the first name followed by the complete last name. For example: John Smith becomes "jsmith". The second format is the full first name followed by the first initial of the last name. For example: John Smith becomes "johns". Either format or any format you select will work up to the maximum of ten characters allowed.

Note: Make certain that each user has a unique user ID. The user ID is used in naming temporary files. If users share an ID, the temporary files for the first user will be deleted when the second user signs in. This could cause a disruption in processing for the first user.

The Password entered must meet the minimum length requirement as specified in the Minimum Length field in Enterprise Setup. If the Letters and Numbers check box is selected in Enterprise Setup, the password must also contain a combination of letters and numbers. Along with the user ID, the password forms a unique combination that grants access to People-Trak and determines which features will be available. The password entered with the User Setup process (selected from the Setup menu) can be changed by the user with the Change Password option (selected from the Tools menu). When the password is typed in, asterisks are displayed for security purposes. In addition, the password is encrypted when stored in the database.

The User Type is the type of the user. In the base People-Trak Essential HR product, the only valid user type is HR, and this field is display only. One thing the user type controls is when the User ID/Password combination is valid. For example, if the user type is HR, the User ID/Password combination is only valid when logging in as an HR user.

The User Active check box allows you to specify whether or not the user is active. Select the check box to make the user active. Clear the check box to make the user inactive. If the user is not active, he cannot log into People-Trak. When a user is locked out because of exceeding

the login attempt limit or grace logins (set in Enterprise Setup), the user is automatically set to inactive by clearing this check box. The System Administrator would have to select this check box for that user in order to give the user access to People-Trak again.

The date of the last password change is found in the Last PW change field. This field is system maintained but can be manually changed if required.

Grace Logins Used is the number of grace logins used out of the number allowed. This field is display only and is system maintained. The number of grace logins allowed is set in the Grace Logins field in Enterprise Setup. Every time the user logs in without changing his password when a change is required, he will use one of his grace logins and this Grace Logins Used counter will be incremented. For example, if the Grace Logins count in Enterprise Setup is 3 and the user just used his first grace login, this counter will say “1 of 3”.

The Password Question is the question to display when the Forgot your Password link is clicked on the Login screen after the User ID for this user has been entered.

The Password Answer is the answer to the question entered in the Password Question field. If a user forgets his password, he must enter his User ID and then click the Forgot your Password link. The Password Question is displayed, and the user must enter the correct answer, as specified in this Password Answer field. When the correct answer is entered, the password for the user is mailed to the Email Address specified for the user here in User Setup.

Note: This answer is case sensitive, so how you enter it here is exactly how it must be entered when using the Forgot your Password link.

Preferences Tab

The Preference tab is used to specify user preference settings. These settings are listed and defined below.

- Scheme Name
- Default Company
- Default Module
- Alarm Frequency
- Lookup Limit
- Enable Preselect
- Inbox on Login
- Run on Double –Click
- Auto-Delimit
- Email Closing

The Scheme Name is the name of the color scheme to use for the user’s desktops and screens. This field is supported by the Select Color Scheme popup, which includes a list of color schemes. People-Trak is shipped with several color schemes, but you can define your own using the Maintain Color Schemes utility, which can be accessed by clicking the Define Colors button on this tab.

The Default Company is the company to which the user is defaulted when logging in. The user can switch to any other company to which access has been granted after log in. This field should be set to the company that the user most frequently uses. This field is supported by the Select Company popup.

The Default Module is the module to be made the current module when this user logs in. The user can switch to any other module to which access has been granted after login. This field

should be set to the module that the user most frequently uses. This field is supported by the Select Module popup.

The Alarm Frequency is the number of minutes between each check for alarms. The default setting for this field is 5 minutes. This means that alarms will be checked every 5 minutes. If you would like to increase this length of time for this user, you may choose to check alarms every 10, 30 or 60 minutes. There is also a 1 minute option, but this should be used only if absolutely necessary as it will slow system processing time.

The Alarm Frequency setting also controls how often the Inbox counter is refreshed. This counter shows how many items you have in your Inbox and is displayed below the Inbox icon on the Organizer Shortcut Bar. If the Alarm Frequency is set to 5 minutes, the Inbox counter will be updated every 5 minutes with the current number of items in your Inbox.

The Lookup Limit is the number of records to show when a lookup is run. The default setting for this field is 0, which means that all qualifying records are to be shown. Changing this setting is only required if you have a very large number of records in the database, which would increase the time taken for a lookup. If you do choose a value for the Lookup Limit that is then less than the number of qualifying records in a lookup, the lookup results will state that the assigned record limit has been enforced. If you do not choose a value for the Lookup Limit and the number of qualifying records is greater than 5000, a Lookup Limit of 5000 is automatically enforced.

The Enable Preselect check box allows you to specify for this user whether or not an entry is pre-selected when the cursor is first positioned to a field. Windows normally pre-selects the entire entry. If you inadvertently press any key, the entire existing entry is replaced with that key. The People-Trak standard interface does not pre-select existing data, so this check box is cleared. If you would like the entire entry to be pre-selected, select this check box.

The Inbox on Login checkbox allows you to specify whether or not the Inbox will be displayed when the user logs in. Once you have closed the Inbox and moved deeper into People-Trak, the Inbox can be reactivated in the Organizer desktop with a single click on the Inbox icon on the Shortcut Bar or by selecting the Inbox option on the Tools menu.

The Run on Double-Click check box allows you to specify which action to take when the user double-clicks on a document in the Explorer. If this option is checked, the document will run when you double-click on it. If this option is not checked, the appropriate document editor screen is opened when you double-click on a document.

The Auto- Delimit checkbox allows you to specify whether or not you want date delimiters automatically entered for you when entering a date. If this check box is selected, only numbers can be entered in a date field and the delimiter specified in the PC's regional date format setting is automatically entered in the correct positions. If this check box is not selected, numbers and a delimiter of ".", "/" or "-" can be entered in a date field, and the field is formatted to the PC's regional 10-character date format after it is entered. For example, if you type in "3.4.9" and press ENTER, the date will be formatted to 03-04-2009 if the PC's date format is m-d-yyyy, mm-dd-yyyy or some variation of that.

The Email Closing field is used to specify the email closing template for an email. This closing is specified for the current user. This field is supported by the Email Closing Template. You can add this closing to the email text area by clicking the Add Closing button on the Send Email screen.

User Task Preferences

The Copy from Desktop button replaces the selected user's tasks with the default tasks that were defined for their user type in Desktop Setup.

The Define Tasks button displays the Desktop Tasks defined for the selected user. Tasks may be updated using the Copy from Desktop button or by manually entering tasks.

Identity Tab

The Identity tab is used to specify the employee ID, contact information and digital signature.

Standard Workflows Tab

The Standard Workflows tab is used to specify for each user the screens to be displayed in each standard workflow and in what order.

Select the user and module for which you want to change the standard workflow. In the Screens frame, select the check boxes for screens to which you want the user to have access or clear the check boxes for screens to which you don't want the user to have access. You can also click the Up and Down buttons to move screens to another location in the display order.

Quick Search Tab

The Quick Search tab lists the modules the user has access to and specifies the Lookup Favorite to be used for each module when the Quick Search button is clicked by this user when looking up records.

User Variables

The follow system variables are taken from the similarly-named fields that are maintained in the User Setup process. These variables reflect the currently logged in user. This is useful when the same form or letter is to be used by multiple users, but is to be signed by the user actually producing the report. The name of the user actually producing the particular letter is substituted into the letter.

- User Name
- User Phone
- User Extension
- User Fax
- User Signature
- User Email
- User Title

Lesson 1

Desktop Setup

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This lesson covers how to specify the key settings in the Desktop Setup process.

Tutorials

Specifying Login Settings: shows how to change how the Login screen looks by changing the settings and images used by the Login screen.

Specifying Default Desktop Settings: shows how to change how the Login screen looks by customizing the color scheme used by the Login screen.

Specifying Logos and Header Settings: demonstrates how to determine what logo should display on documents as well as what should display in the header area of the Login screen and desktops.

Organizer Tab: specify which modules are accessible within the modules pane of the Organizer desktop

Specifying Default Desktop Tasks: shows how to assign the default desktop tasks for a user type.

Tutorial 1.1 – Specifying Login Settings

The Login Settings tab of the Desktop Setup process allows you to change how the Login screen looks by changing the settings and images used by the Login screen. Let's take a look at each of these settings.

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

The Desktop Setup screen is displayed with the Login Settings tab open.

2. In the **Login Caption** field, enter the caption you would like to have on the Login screen.
3. In the **Login Welcome Text** field, enter the text you would like to have in the welcome area of the Login screen.
4. Click in the **Login Image** field, and then click the **Select Image** popup button.

The Select File screen is displayed.

5. In the **PT9\SAMPLES** directory of your local People-Trak drive, select **PETE WELCOME.JPG**.

This image will be displayed on the right side of the Login screen and should be sized to 260 pixels wide by 260 pixels high.

6. Click the **Desktop** tab.

The Color Scheme field allows you to specify a color scheme to be used for the desktop

7. In the **Color Scheme** field, select the popup to display the **Select Color Scheme** screen.
8. Select **London Fog**, which is a gray scheme that will go nicely with the picture we are going to choose for the login image.
9. Close the **Desktop Setup** screen, saving your changes.

We are ready to see how our changes affected the Login screen.

10. Click the **Logoff** shortcut on the Shortcut Bar.

The Login screen is displayed using the London Fog color scheme and the Login Image you chose of Pete the People-Stik cruising on by. The Login Caption you entered is displayed as the caption. The Login Welcome Text is displayed as the welcome below the caption. We will learn about the heading settings for the Login screen in a future tutorial

11. Log in as **DEMO/DEMO**.

Notice that the desktop color scheme changed to the one assigned to the DEMO user, which is Charcoal Mint. The color scheme within Desktop Setup is only used for the Login screen, before the user is known. We will take a closer look at user desktop settings in User Setup.

12. On the **Setup** menu, elect the **Desktop Setup** menu option and return to the **Desktop** tab once again.

We're done playing with colors so let's set the color scheme for the default desktop back to Charcoal Mint. Later training assumes that you have the data colors set to those in that scheme.

13. In the **Color Scheme** field, change the color scheme back to **Charcoal Mint**.
14. Stay on the **Desktop** tab and continue with the next tutorial.

Tutorial 1.2 – Specifying Default Desktop Settings

The Desktop tab of the Desktop Setup process allows you to determine default settings for the desktop that include overall settings such as alignment and colors and specifications for the web.

1. You should still be on the **Desktop** tab within **Desktop Setup**.
2. Click the **Set Colors** button, which is in the upper-right corner.

The Color Schemes screen is displayed. You have automatically run the Maintain Color Schemes utility, which is also available from the Utilities menu. Charcoal Mint is highlighted in the list on the left, and the colors shown on the right are the ones assigned to that color scheme.

The standard color schemes that are shipped with People-Trak cannot be changed. Since we want to play with some colors, we will first need to create a new color scheme in order to do so. We can either copy the current color scheme or create a new one that is based off the Classic Blue color scheme. Let's use the copy feature so we can keep our cool mint colors and just change the data colors a bit.

3. On the **File** menu, select **Copy Color Scheme**.

The current color scheme is copied to a new color scheme called Charcoal Mint-1.

4. Change the **Scheme Code** to **My Color Scheme**.

First, let's take a look at the frame and background colors.

The fields in the Frame and Background Colors frame are currently using the colors assigned to the Charcoal Mint scheme: the Light Color is a pale mint color, Medium is a pale light green, and the Dark Color is an evergreen shade. Let's spruce things up by picking some new colors.

5. In the **Light Color** field, click the popup button.
6. The **Select Color** popup is displayed.

For the time being, we will stick with the eleven basic colors

7. Click on **Yellow**.

The Light Color field is changed to the yellow color you chose

8. Click **OK**.

9. In the **Medium Color** field, click the popup button.

10. Click on **Orange**.

The Medium Color field is changed to the orange color you chose

11. Click **OK**.

12. For the **Dark Color** field, repeat the same steps to select and change that color to **Red**.

13. Click the **Preview** button.

You can see what your current colors will look like in the preview screen on the right-hand side of the screen.

With the frame and background colors decided on, why don't we take a look at data colors?

The fields in the Data Colors frame are currently using the data colors assigned to the Charcoal Mint scheme: Normal is Blue, Modified is Red, Mask is Yellow and Pending is Magenta. Let's change some of them.

14. In the **Normal Color** field, click the popup button.

The Select Color popup is displayed. We can pick one of the eleven basic colors as we did earlier, or we can get creative and make a custom color. Let's get creative!

15. Select **Custom**.

The Color screen is displayed with the current color (Blue) displayed in the Color|Solid area. This color just happens to be a basic color, so that square is highlighted in the Basic Colors. This shade of blue is also circled by dashes in the spectrum area and arrowed on the slider bar. The six color settings depict that color as well.

Choosing a color can be as simple as selecting from one of the 48 basic colors. Let's do that for the Normal color.

16. Click on one of the **green** shades in the **Basic colors** section.

All of the settings on the right side of the screen are changed accordingly.

If you are really fond of a color and want to use it again, you can add it to the Custom Colors section.

17. Click the **Add to Custom Colors** button.

Your custom green color is added to the next available square in the Custom Colors section and can be easily selected in the future.

18. Click **OK** to select your custom color.

19. Select **OK** on the Select Color popup.

The Normal Color field is changed to the green color you chose.

20. In the **Modified Color** field, use what we have just learned to select a custom **blue** shade of your choice.

The Modified Color field is changed to the blue color you chose

21. Click **OK**.

22. In the **Mask Color** field, select a **grey** shade using either color selection method.

23. Click **OK**.

24. Now try to change the **Modified Color** to the same color you used for the **Normal Color**.

You won't be able to do so. This is because the Normal, Modified, Mask and Pending colors must all be unique. In your case the Normal Color is a certain shade of green, so the three other color fields cannot be that shade of green. In addition, the Normal, Modified and Pending colors cannot be white because the background color on text boxes is white and the white text would be completely lost in the white background. All four colors should also be noticeably different from the gray color that is used for display only.

The Pending Color field is used when approvals are being used. We won't take time to demonstrate that, but the color is changed just like the other data colors.

25. Click the **Preview** button to see what your data colors will end up looking like in action.

Let's give our minds and eyes a well deserved break and move on. We won't be changing any other colors in this demonstration.

26. Close the **Color Schemes** screen, saving your changes.

Before leaving the Desktop tab, let's make sure that we change the color scheme to something other than the mess of colors we have just created.

27. In the **Color Scheme** field, select **London Fog** as the new default desktop color.

28. Close the **Desktop Setup** screen saving your changes.

You may notice that our desktop colors have not changed. While we did change the default desktop settings for the HR user type, we still need to update these settings for our individual users. We will have the opportunity to do this in a future lesson when we learn about User Setup. Before we do that, we have a few more important areas to cover within Desktop Setup.

29. Continue with the next tutorial.

Tutorial 1.3 – Specifying Logos and Header Settings

The Logos and Header tab of the Desktop Setup process allows you to determine what logo should display on documents as well as what should display in the header area of the Login screen and desktops.

1. On the **Setup** menu, select **Desktop Setup**.
2. Click the **Logos and Header** tab.

The Document and Heading Logo fields allow you to select what logos you would like to use when the enterprise header is being used. You select these like you saw earlier in the Company Setup training. Since we want to demonstrate how the header text settings work in this tutorial, we will need to change our Heading Logo to be one that does not already include text.

3. In the **Heading Logo** field, click the leftmost popup button to select the image. In the **PT9\SAMPLES** directory of your local People-Trak drive, select **ZTI_BANNER_NO_TEXT.JPG**.
4. Click on the **Enterprise Header Only** check box to select it.

By selecting the Enterprise Header Only check box, we will set all desktop headers and as wells as the header on the login screen to the Heading logo that we just selected in Desktop Setup.

5. Double click on the **Include Header Text** check box to select it.

The Include Header Text check box allows you to include the heading text in the enterprise header. You would want to clear this check box if your enterprise heading logo has the heading text already in it. This was the case with our original logo, however, as we mentioned earlier, our new Heading Logo does not.

The Header Text Alignment field allows you to choose how you want the heading text aligned. This field is only used when the Include Header Text check box is selected.

6. Leave the **Header Text Alignment** set to **Right**.

The last four settings allow you to specify the font and color to use for the text.

7. In the **Name** field, use the popup to select whatever font settings you want.
8. In the **Color** field, choose your favorite color.

Let's see how the settings you just made affect the headers on the Login screen and desktops.

9. Close the **Desktop Setup** screen, saving your changes.
10. Click the **Logoff** shortcut on the Shortcut Bar.

The Login screen is displayed with the header including the enterprise heading logo on the left and the enterprise name justified to the right, using your font and color choices.

11. Log in as **DEMO / DEMO**.

The Organizer desktop is displayed. Since you chose to use the enterprise header only, the enterprise header is displayed here just like on the Login screen.

Let's show you what a short logo looks like in the heading. We will change our company header to use that and then switch back to using company headers again.

12. On the **Setup** menu, select **Desktop Setup**.
13. Click the **Logos and Header** tab.
14. In the **Heading Logo** field, select **ZTI_ACTIVE_SHORT_LOGO.JPG** from the **PT9\SAMPLES** directory of your local People-Trak drive.
15. Close **Desktop Setup**, saving your changes.

The heading has changed to display the current company's short logo but the company name is not displaying. This is because the image we used is not wide enough to have the company name text overlaid upon it. The image must be as wide as what you want to display in the heading. We recommend that all Heading Logo images be sized to 1040 pixels wide by 74 pixels high, which matches the size of the heading area of the desktop. Let's pick an image that has the correct dimensions.

16. On the **Setup** menu, select **Desktop Setup**.
17. Click the **Logos and Header** tab.
18. In the **Heading Logo** field, select **ZTI_ACTIVE_BANNER_NO_TEXT.JPG** from the **PT9\SAMPLES** directory of your local People-Trak drive.

This logo looks just like the Document Logo but is in fact wider using white space to extend the image.

19. Clear the **Enterprise Header Only** check box.

Company headers will now print on the desktops.

20. In the **Header Text Alignment** field, enter **Left**.
21. Close the **Desktop Setup** screen, saving your changes.

This time the heading displays both the logo and the name. Note that the name is left justified in the area available for the heading text. As you can see, Desktop Setup controls the text alignment for both the enterprise and company headers.

22. Click the **Logoff** shortcut on the Shortcut Bar.

The Login screen is displayed and now includes the enterprise logo with the name left justified this time. The enterprise header always prints on the Login screen, unless you are using custom headers and footers, which is available on the Web.

23. Log in as **DEMO / DEMO**.

The Organizer desktop is displayed. The header area contains the company logo and name.

Let's return our desktop and login header settings back to where they were when we first started.

24. On the **Setup** menu, select **Desktop Setup**.
25. Click the **Logos and Header** tab.
26. In the **Heading Logo** field, select **ZTI_BANNER_HR.JPG** from the **PT9\SAMPLES** directory of your local People-Trak drive.
27. Clear the **Include Header Text** check box.
28. Close **Desktop Setup**, saving your changes

The company header (and the enterprise header, which you can't see yet) is now back to the way it was when we started.

As you have seen, the headings on the Login screen and desktops can be customized to exactly what you desire.

29. Continue with the next tutorial.

Tutorial 1.4 – Organizer Tab

The Organizer tab is used to specify which modules are accessible within the Modules pane of the Organizer desktop. In this tutorial you will learn how to adjust these settings according to your desktop preferences.

1. On the **Organizer** desktop, take a look at the modules listed in the **Modules** pane.

Of all the modules we have access to; perhaps we aren't utilizing Contact Management at this point in time. And by removing it from the Modules pane, it is one less

2. On the **Setup** menu, select **Desktop Setup**.

3. Click the **Organizer** tab.

A list of the available modules is displayed. Each module has a checkbox that has been selected. But not for long.

4. Select the **Contact Management** module and clear its check box.

5. Close the **Desktop Setup** screen, saving your changes.

The Contact Management module is no longer in the Modules pane of the Organizer desktop.

Multiple modules can be removed using the same steps.

6. On the **Setup** menu, select **Desktop Setup**.

7. Click the **Organizer** tab.

8. Clear the checkboxes for the remaining modules except for Personnel Management.

9. Close the **Desktop Setup** screen, saving your changes.

Personnel Management is the only module within the Modules pane. This change is extreme, but luckily it is only temporary.

10. On the **Setup** menu, select **Desktop Setup**.

11. Click the **Organizer** tab.

Re select all cleared checkboxes to activate the modules once again.

12. Close the **Desktop Setup** screen, saving your changes.

The modules have been returned to the Modules pane and it is as if nothing ever happened.

13. Continue with the next tutorial.

Tutorial 1.5 – Specifying Default Desktop Tasks

In this tutorial, you will learn how to assign default desktop tasks to a user type, which will then be used to populate and update Desktop Tasks within User Setup.

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

2. Click the **Tasks** tab.

Let's start fresh by deleting all the existing tasks.

3. On the **Tool Bar**, select the **Delete Row** button to delete all the existing tasks.

You have a choice of having tasks for a user organized by groups. Group names can be anything you want. If you do choose to use groups, it is important that all tasks for each group be kept together in the tasks grid.

Our training database uses the group option, so we'll add our new tasks to a group as well.

4. In the **Group** column of the first blank row, enter **My HR Activities**.

5. As you leave the field, the following message is displayed:

Entry is not in the table, Override Table?

6. Click **Yes**.

7. In the **Module** column, click the popup button.

The Select Module popup is displayed with a list of the modules that this user has access to.

8. Select the **Personnel Management** module and select **OK**.

9. In the **Task Type** column, click the popup button.

The Select Task Type popup is displayed with a list of the task types that this user has access to.

10. Select the **Activity** task type and select **OK**.

11. Try entering a task name directly into the **Task Name** field. You cannot.

Because of the complexity of this selection process, you must use the popup button to select a task.

12. In the **Task Name** column, click the popup button.

Since we selected Activity for our task type the Select Activity popup is displayed with a list of the activities within the Personnel module that this user has access to.

13. Select the **Employee Manager** activity.

The Display Name field for this task is defaulted to the Task Name but can be changed.

We can use the same methods to add a few more tasks to our task list.

14. Select the **Save** icon.
15. In the **Group** column of the second blank row, enter **My HR Workflows**.
16. As you leave the field, the following message is displayed:

Entry is not in the table, Override Table?
17. Click **Yes**.
18. Select the **Personnel Management** module and add a **Create** task that uses the **Standard- Employee** workflow.
19. Select the **Save** icon and move to the next blank row.
20. In the **Group** column, select the popup button.

Remember the two tasks we just saved? By saving those tasks, we were able to store the group names in a table. For future tasks that may be in the same group, we can simply select the group name from this table instead of rekeying it.

21. Select the **My HR Workflows** group.
22. For this task, select the **Safety Management** module and add an **Edit** task that uses the **Standard- Incident** workflow.
23. In the next row, select the **Benefit Administration** module and add a **Document** task type.
24. Use the **Select Document** popup to select the **Benefit Plan Enrollment by Employee** report from the **Benefit** category in **Adhoc Reports**.
25. In the next row, select the **Safety Management** module and add a **Processing** task type.
26. Use the **Select Processing** popup to select the **Claim Cost Batch**.

For our final task, we are going to add a link, which is done a bit differently than our other tasks. First of all, we don't need to specify a module; however, we do need to select what type of task we are adding.

27. In the **Task Type** field, use the popup to select the **Link** task type.
28. Select **OK** to return to the **Tasks** tab.
29. In the **Task Name** field enter **www.shrm.org**.

The Display Name is defaulted to the URL, but as we mentioned, this can be changed.

30. In the **Display Name** column, enter the following:

SHRM Home Page

31. Close the **Desktop Setup** screen, saving your changes.

We will be taking a closer look at how the default desktop tasks are updated for individual users in an upcoming tutorial.

32. Continue with the next tutorial.

Notes

Lesson 2

User Setup

Lesson Contents

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This lesson covers the key settings in the User Setup process.

Tutorials

Adding/Deleting Users: demonstrates how to add and delete users.

Setting User Preferences: shows how set the preferences for individual users.

Changing Default Settings at the User Level: demonstrates how modify the default preferences for individual users.

Changing Standard Workflows: demonstrates how to change the standard workflows for a user.

Tutorial 2.1 – Adding/Deleting Users

This tutorial describes how to add and delete users.

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

When you first enter the User Setup screen, the user ID you used to access People-Trak (DEMO in this case) becomes the current user record being edited. You can use the list of users to select any other user for editing.

2. On the **File** menu, select **New User** or on the Tool Bar, click the **New User** button to add a new user.

A new user is created with a temporary User ID of “NEW-” concatenated with the next sequential number available. In our case, that User ID is NEW-1 since that code did not exist yet. As you can see, this is the same naming scheme that was used when we added a new company.

Your new user is now your current user for editing purposes. At this point you would enter all the information for this new user, but let’s demonstrate the Copy User feature to see how this can save you some time if you have an existing user that is similar to the new user you want to create. This is very similar to the Copy Company feature you learned about in the last lesson. Let’s assume the user that is similar to the one we want to create is the DEMO user.

3. Highlight the **DEMO** user.
4. On the **File** menu, select **Copy User**.

A new user is created with a User ID of DEMO-1, which is the User ID of the user you copied concatenated with a dash and the next sequential number available. In addition, the settings for the DEMO user are copied to the new user, except the Password field. You can look at the other tabs if you wish to verify this. In addition, the security settings (specified in Security Setup and Security Setup – Module) for DEMO are copied to the new user.

5. Change the **User ID** of the new user from **DEMO-1** to **JSMITH**.

Normally, you would enter the correct user ID per your naming conventions. Typical user IDs are composed of the first letter of the user’s first name followed by their last name (but you may use any system that works for you).

6. Assign a **Password** to the new user.

This can be a temporary password that the user can replace using the Change Password process once he or she has accessed People-Trak. As you type in the password, asterisks are displayed for security purposes. In addition, the password is encrypted when stored in the database.

7. Select the **Preferences** tab.

The Default Company and Default Module fields are the same as the DEMO user you copied. We will leave these fields as is.

8. Click the **Identity** tab.

9. In the **Employee ID** field, click the popup button.

The Lookup screen is displayed.

10. Click **Search** and then highlight any employee. Click **OK**.

Note that the Full Name through Digital Signature fields have had information brought in from the Employee record and are display only.

If you have users that are not employees, such as consultants, you would leave the Employee ID field blank, and enter the following fields manually.

11. Click the **Standard Workflows** tab.

The DEMO user currently has the standard workflows for each module set up in the same way that the standard workflows are shipped, with all screens on and in that same order. We will take a closer look at this tab in an upcoming tutorial.

12. Click the **Quick Search** tab

The DEMO user did not have a Quick Search Favorite assigned for any of the modules, so the new user does not have any either.

We have seen how the addition of a new user is accomplished. Now, let's delete this user.

13. On the **File** menu, select **Delete User** or on the Tool Bar, click the **Delete User** button to delete the user. You will be asked to confirm the deletion. Go ahead and delete the user. We will leave **NEW-1** user alone for now, as we will be using them in an upcoming tutorial.

Note: In a live environment, you will want to delete users with caution because documents owned by those users are also deleted. If the user you want to delete is the owner of any documents that you want to keep, you will need to copy those documents to another user or to the COMMON user first.

14. Continue with the next tutorial.

Tutorial 2.2 – Setting User Preferences

In this lesson, we will take a look at just a few of the user preferences that can be specified on the Preferences tab of User Setup.

1. You should still be in the **User Setup** screen. Select the **DEMO** user.
2. Select the **Preferences** tab.

The Enable Preselect check box field determines whether text boxes (stand alone and in grids) are to be treated in the Windows way or in the People-Trak way. At this point, the check box should not be selected.

3. Move the cursor around and note that with preselect not enabled, the entry in the field is not pre-selected.
4. Change the interface to the Windows standard by selecting the **Enable Preselect** check box.

In order to see this change take effect, you must close User Setup and save your changes.

5. Close the **User Setup** screen, saving your changes. Select **User Setup** option again.
6. Now, move the cursor from field to field, and you will see that the contents of each field are pre-selected.

If you touch a key when the contents are pre-selected, the contents are replaced with the key you pressed. This scares people and is why People-Trak is shipped with preselect disabled. It is a better way to meet the heavy data entry requirements of a personnel management product.

7. Clear the **Enable Preselect** check box.

Now, on to the Auto-Delimit feature. People-Trak is shipped with the Auto-Delimit feature turned on, which automatically puts the appropriate delimiter (from your PC's regional format settings for dates) in dates for you; all you need to do is type the numbers. If you prefer to type in your own delimiters, you can turn this feature off. You have already seen the delimiters put in for you in the Intro to PT training, so let's turn off this feature and see how that works.

8. Clear the **Auto-Delimit** check box.

We can use the Last PW Change date field on this screen to demonstrate this setting, but we need to close the screen and come back into it in order for the setting change to take effect.

9. Close the **User Setup** screen, saving your changes.
10. Select the **User Setup** option again and stay in the **Login** tab area.
11. Clear the **Last PW Change** field and then type **119** and press **ENTER**.

No delimiters are automatically placed for you, and you receive an invalid date message.

12. Clear the **Last PW Change** field and then type **1.1.9** and press **ENTER**.

The date is formatted according to your PC's regional format settings for dates. Our date examples assume a "m-d-yyyy" setting so "01-01-2009" is displayed. Note that you did not have to put in "01-01-2009" but could use date "shorthand". You can use the ".", "-", or "/" delimiters when you type in a date and upon pressing ENTER, the date will be formatted according to your PC's regional 10-character date format after it is entered.

Let's turn the Auto-Delimit feature back on before we head to the next tutorial.

13. Switch to the **Preferences** tab
14. Select the **Auto-Delimit** check box and stay in the **User Setup** screen.
15. Continue with the next tutorial.

Tutorial 2.3 – Changing Default Settings at the User Level

In a prior lesson, we defined the default desktop colors and tasks for our HR users. Within this tutorial, we will be learning how these default settings can be changed for individual users.

1. You should still be in the **User Setup** screen on the **Preferences** tab.
2. Select the **NEW-1** user.

Notice that the scheme name for our NEW-1 user has been set to London Fog, the default that we recently changed in Desktop Setup. Every time a new user is created, they are assigned the default color scheme.

You may recall that we defined default desktop tasks as well. When the NEW-1 user was created, they automatically inherited those tasks. We check on that now.

3. Select the **Define Tasks** button.

The Desktop Tasks screen is displayed along with the tasks we defined.

4. Close the **Desktop Tasks** screen.

Our newest user is up to date with the defaults. For our existing users, however, we may need to do some housekeeping.

5. Select the **DEMO** user.

The color scheme is still set to Charcoal Mint which is not the default.

6. Select the **Define Tasks** button.

The tasks haven't been updated to the defaults either.

Let's synch the DEMO user with Desktop Setup.

7. Close the **Desktop Tasks** screen.

8. Select the **Copy from Desktop** button.

The DEMO user's color scheme has changed to London Fog. We still need to take a look at their desktop tasks.

9. Select the **Define Tasks** button.

The Desktop Tasks screen is displayed with the updated set of tasks. A successful synchronization has occurred!

10. Close the **Desktop Tasks** screen.

Some users may not prefer having default settings assigned, and may request color schemes and task based on their individual preferences. User settings can be easily changed as we will find out with the DEMO user.

First, let's change the default desktop colors for the DEMO user.

11. In the **Scheme Name** field, select the **Charcoal Mint** color scheme.

And with that, the desktop colors are changed. If the DEMO user was a bit pickier about colors, we could modify this color scheme like we did in Desktop Setup. But for now, this color scheme is perfect.

Now we can move on to modifying the DEMO user's tasks.

12. Select the **Define Tasks** button to display the **Desktop Tasks** screen.

13. Highlight the task in the first row.

14. On the **Tool Bar**, select the **Insert Row** button to add a new blank row.

Let's add an administrative task that will only be for our DEMO user.

15. In the **Module** column, use the popup to select the **Personnel Management** module.

16. In the Task Type column, use the popup to select the **Administration** task type.

17. In the **Task Name** column, use the popup to select the **Adhoc Reports** task.

18. Click the **Save** button to save all of these changes.

The DEMO user now has the ability to run, create, and maintain adhoc reports from their list of tasks. They have been uniquely set apart from the other users who have only been given the default desktop tasks.

Speaking of being unique, users may also have a set of tasks that is specific to them. We will take a look at how this is done, once again with our DEMO user.

19. Highlight the task in the first row, which should be the newly added administration task.

20. On the **Tool Bar**, select the **Delete Row** button to delete all the existing rows.

21. Leave the Group column blank and add three different activity tasks from the COBRA Administration module.

There you have it! Changing and updating tasks on a user level is as simple as that.

22. Close the **Desktop Tasks** screen, saving your changes.

23. Close the **User Setup** screen, saving your changes.

Since future lessons assume that we are using the Charcoal Mint color scheme, we should change our default desktop settings back to reflect this.

24. On the **Setup** menu select **Desktop Setup**.

25. On the **Desktop** tab, use the popup in the **Scheme Name** field to select the **Charcoal Mint** color scheme.

26. Close the **Desktop Setup** screen, saving your changes.

27. Continue with the next tutorial.

Tutorial 2.4 – Changing Standard Workflows

People-Trak is shipped with a standard workflow for each module. The naming convention is “Standard - *Record*”, where *Record* is the name of the record maintained by that module. For example, the Personnel Management module maintains the Employee record, so the workflow for that module is “Standard-Employee”. Each user can have his own version of the standard workflow. Let’s see how to do this.

1. On the **Setup** menu, select **User Setup**
2. Click the **Standard Workflows** tab.

The first module in the Modules pane, Personnel Management, is selected. All of the screens in the Screens pane are selected. The DEMO user is defaulted to having all of the standard workflows be the same as what is shipped with People-Trak. So, what you are seeing as the order in the Screens pane is the same as the shipped Standard - Employee workflow for the Personnel Management module.

3. Select **Safety Management** in the **Modules** pane.

The Screens pane now displays the screens for the Standard - Incident workflow for the Safety Management module. Let’s go back and change the Standard - Employee workflow for the Personnel Management module.

4. Select **Personnel Management** in the **Modules** pane.

To remove a screen from being displayed in a workflow, just clear the check box for that screen.

5. In the **Screens** pane, click **Status**, which will highlight that check box. Click **Status** again, which will clear that screen’s check box.

You can also change the order of the screens.

6. In the **Screens** pane, click **Compensation**, and then click the **Up** button twice to move the **Compensation** screen up to the top of the **Screens** pane.

The Compensation screen is now our first screen and the Status screen will no longer be displayed.

7. Close the **User Setup** screen, saving your changes.
8. Click the **Open Employee** shortcut on the Shortcut Bar and select any employee.

As you specified, the Compensation screen is the first screen displayed.

9. Click the **Screen** dropdown button.

You can see that the Personal screen is next in the list and there is no Status screen after that. We have changed the standard workflow, but only for this user.

10. Close the dropdown, and close the employee.

11. On the **Setup** menu, select **User Setup**.

Let's change the DEMO user's Standard - Employee workflow back to the way it was.

12. On the **Standard Workflows** tab, move the **Compensation** screen back down to being third in the list of screens. Select the **Status** screen's check box so it will be included once again.
13. Close the **User Setup** screen, saving your changes.
14. Exit **People-Trak**.
15. This concludes this tutorial and lesson.