Enterprise, Company, and Module Setup

Version 9.0

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

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Enterprise Setup

An enterprise is one discrete implementation of People-Trak. A typical installation of People-Trak will include one Live enterprise and one Demo enterprise. Authorized Service Bureaus will have additional enterprises in order to support their clients.

Within one enterprise, there can be more than one company. People-Trak comes with two pre-defined companies: ACTIVE and ARCHIVE. You can also define additional companies. The settings defined in Enterprise Setup apply to all companies within that enterprise.

The Enterprise Setup screen uses six tabs to record and maintain setup information for the enterprise.

Settings Tab

The Settings tab is used to record general and security settings for the enterprise.

Note: People-Trak has settings that force mandatory password changes after a period of time, lock out users after a specified number of attempts at login, and require certain criteria in passwords. A mandatory password change is also required for new users upon first login and for users that no longer have passwords that meet specified criteria; in this case, the mandatory change is forced because People-Trak clears the Last PW Change date for those users. All of these settings are on the Security tab.

General Settings

Enterprise Name	The name of the enterprise. This name is displayed on the Login screen when logging into this People-Trak enterprise.
Email Server Address	The email server address for your company. This information is required in order to send email from within People-Trak.
Use Authentication	A check box that allows you to specify whether or not to use authentication when sending emails. Select the check box to use authentication. Clear the check box to not use authentication.
Email Server User ID	The User ID to use to log onto the email server. This information is required in order to send email from within People-Trak.
Email Server Password	The password to use to log onto the email server. This information is required in order to send email from within People-Trak.

Time Server Address	The Internet or IP address of the time server to which you would like to synchronize a computer's clock. This synchronization will occur at the same frequency as the Alarm Frequency setting specified in the User Setup process. If the Alarm Frequency is 5 minutes, the computer's clock will be synchronized every 5 minutes as well. If this field is left blank, no synchronization will be done.

Synchronization of time is critical when using time and attendance applications.

Button Functions

Tests	Displays a Test Settings screen that allows you to test both the email and time server settings.
Password Change Days	The number of days between required changes of a user's password. For example, if you want to force users to change their password every 30 days, enter 30 here. If you set this value to 0, the user would be prompted to change his password on each login, which is not what you would typically want.
Days Before Reuse	The number of days required before re-using a prior password. For example, if you set this field to 90, the user cannot re-use the same password until 90 days have passed.
Attempts Before Lockout	The number of sets of login attempts allowed before locking the user out of People-Trak. People-Trak allows a user three attempts to log in before leaving People-Trak and requiring the user to run People-Trak again. If you set this field to 2, a user will have a total of six (2 x 3) attempts before getting locked out of People-Trak. An administrator will have to give access back to that user in order for him to access People-Trak again.
Grace Logins	The number of logins allowed before locking the user out of People-Trak when a password change is required and has not yet been done. For example, if a user must change his password because the Password Change Days time period has passed, he can log into People-Trak this "grace" amount of times without changing the password. One more attempt to login after the grace amount will lock the user out of People-Trak. An administrator will have to give access back to that user in order for him to access People-Trak again.
Minimum Length	The minimum character length for a password, which can be any value from 4 through 10. If this length is 4 and you try to enter a new password that is 3 characters or less, your entry will not be allowed.

Note: If you increase this minimum length and you want user passwords to immediately comply with this criteria, click the Update Users button. You will be notified of the number of users that do not meet this criteria, if any. Those users will be required to change their password the next time they log in.

Letters and Numbers	A check box that allows you to specify whether or not a combination of letters and numbers is required in a password. Select the check box to require a combination of letters and numbers. Clear the check box to not require a combination of letters and numbers. If you select the check box and then try to enter a password that has only letters or only numbers, your entry will not be allowed.

Note: If you select this check box and you want user passwords to immediately comply with this criteria, click the Update Users button. You will be notified of the number of users that

do not meet this criteria, if any. Those users will be required to change their password the next time they log in.

Updating Users

The Update Users button selects users who have passwords that do not meet the Minimum Length or Letters and Numbers criteria and clears their Last PW Change date. This then requires those users to change their password the next time they log in. A message is displayed notifying you of the number of users who will be required to change their passwords, if any.

Document Settings Tab

The Document Settings tab is used to define the settings to use when generating documents.

- Header Text Alignment
- Logo Alignment
- Shared Documents
- Default Orientation
- Default Spacing
- Show Gridlines
- Auto Format

The Header Text Alignment field determines the location of the header text on document pages. Header text is composed of the company name, the document title, and the document comment. A table that lists all the valid header alignments supports this field. There are three valid options: left, right, and center. Normally, the header text and the logo are printed on opposite sides of the page, but this is not required.

The Logo Alignment field determines the location of the logo on document pages. A table that lists all the valid logo alignments supports this field. There are three valid options: left, right, and center. Normally, the logo and the header text are printed on opposite sides of the page, but this is not required.

Note: With the proper type of logo, the header text and the logo can be printed on the same side of the page to create a dramatic effect. If you would like to consider this type of arrangement, make the settings and then perform a test print to see how it looks. You can always change the settings to another value.

The Shared Documents check box allows you to specify whether or not the shared documents feature is in use. With the shared documents feature active, the documents created by all users are available to all other users in a single common pool. Select the check box to share documents across the enterprise; when a document is created, the owner will be "COMMON". Clear the check box to not share documents across the enterprise; when a document is created the owner will be set to the user's ID and only that user will be able to access that document.

People-Trak has been designed to allow documents to be owned or controlled by individual users or by the group as a whole. Each document record contains an entry for the owner of the document. If the owner of the document is a user name, the document is owned by that user. If the owner of the document is the special name "Common", the document is common to all users.

When People-Trak is shipped, the shared document feature is enabled. This means that the owner of all pre-defined documents has been set to "Common" and that all new documents will also be created with the "Common" owner.

Shared documents can be disabled by clearing the Shared Documents check box on the Document Settings tab. When documents are not being shared, the Copy Document to User option is available on the File menu. This allows you to copy a common document to a user or copy a user document and make it common

Note: The sharing documents feature applies to all documents as well as Database Manager and Import specifications.

There are two valid Default Orientation settings:

- Portrait
- Landscape

Portrait is the normal orientation. Some organizations prefer landscape because it allows more information across the page. When a report is created, the Orientation is defaulted to the setting specified in this field. The user can then change the setting on a per-report basis.

The Default Spacing field is used to specify the default line spacing for a report. Normal spacing is single-spaced. Rows of the report are stacked neatly together just as the text in a normal paragraph. Double spacing introduces a blank line between each line of text. Triple spacing introduces two blank lines between each line of text. When a report is created, the Spacing is defaulted to the setting specified in this field. The user can then change the setting on a per-report basis.

There are five valid spacings:

- Single
- Single + (1.5 Lines)
- Double
- Double + (2.5 Lines)
- Triple

The Default Alignment field is used to specify the default alignment for a report. When a report is created, the Alignment is defaulted to the setting specified in this field. The user can then change the setting on a per-report basis.

There are two valid settings:

- Left
- Center

The Show Gridlines check box that allows you to specify whether or not a report should be defaulted to show gridlines. Some users find that gridlines make reports easier to read. Select the check box to default a report's Show Gridlines check box to selected. Clear the check box to not default a report's Show Gridlines check box to selected.When a report is created, the Show Gridlines check box is defaulted to the setting specified in this field. The user can then change the setting on a per-report basis.

The Auto Format check box that allows you to specify whether or not a report should be defaulted to use auto formatting. The auto formatting feature allows a report to be automatically sized so as many columns can fit on the page as possible. Select the check box to default a report's Auto Format check box to selected. Clear the check box to not default a report's Auto Format check box to selected.When a report is created, the Auto Format check box is defaulted to the setting specified in this field. The user can then change the setting on a per-report basis.

The Font areas of the Document Settings tab are used to set the default fonts for reports. When a new report is created, these are the settings that take effect. These settings can be overridden on an individual report using the Design Mode feature. If you do not want these settings changed by a user, clear the Design Mode check box for the user in Security Setup.

Font settings can be made for three different areas on a report. These areas include the heading, the body, and the totals. Each area can have its own font name, font style, font size, and font color.

Currency Tab

The Currency tab is used to enter the currencies available and their exchange rates.

Date Variables Tab

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

Name   The name of the date variable. This field is for display only.

Type   The type of the date variable as shown below. This field is for display only.

- Days
- Weeks
- Months
- Years

Direction   The direction used for the date variable as shown below. This field is for display only.

- Backward
- Forward

Periods   The number of periods (as defined by the variable Type) to move in the direction specified. For example, the USER1-DAYS-BACK variable has a Type of Days, so the number entered in the Periods field would be in days, whereas the Periods used for the USER1-WEEKS-BACK variable would be weeks.

NightRun Tab

The NightRun tab is used to specify key settings needed when running the NightRun process for this enterprise. The NightRun process should be scheduled to run nightly and will run for each of the People-Trak enterprises using the specified settings. If NightRun has not run prior to People-Trak on a new day, it will be run on first login.

The following processes are run as part of NightRun:

- Perform Backup of Databases
  (BAK file created, which includes MDF and LDF information)
- Update Compound Fields
- Update Cost Tracking Amounts on a Monthly Basis
- Update Currency Fields
- Download People-Trak News Links
- Check Alert Triggers
- Check Schedule Triggers

- Clear Locks (user, table and record)
- Purge Temp Folder
- Other Database Cleanup

Login User   The user to be used for logging in and running the NightRun process. This user should have Administrator rights. If no user is specified, NightRun will not run.

Last Run   The date the NightRun process was last run. This field is for display only.

Button Functions

Print NightRun Log   Prints the NightRun log.

Company Setup

Multi-Company

A People-Trak enterprise can have multiple companies. People-Trak comes with two pre-defined companies: ACTIVE and ARCHIVE in both the Live enterprise and Demo enterprise. You can also define additional companies.

Each company has its own records, and records can be transferred between companies. For example, if you have an inactive employee record in the ACTIVE company, you can transfer that employee record out of the ACTIVE company to the ARCHIVE company.

A company can have its own tables or tables can be set to be shared across companies. Use the Sharing option in the Table Setup process to define which tables are unique to the company and which are across companies.

A document can use just the records in the current company or it can be set to span companies. Use the Spanning tab in Document Properties to specify what companies are to be spanned for the document. If the Spanning tab is left blank, only the current company is used for the document.

How to Add a Company

You can add a new company by entering all of the information from scratch or copying an existing company.

Deleting a Company

Deleting a company should be done with great caution. Deleting a company deletes all of the following:

- All of the data in that company for all of the modules, which include employees, applicants, etc.
- All of the table entries assigned to that company for tables that are not spanned
- All span entries for that company that are assigned to any report
- The company itself

You can only delete a company that is not currently in use by you and is not a default company for any user.

The Company Setup screen uses eight tabs to enter setup information for the company.

Identity Tab

The Identity tab is used to record the name and address of the company along with other contact information and the description of the company.

Company Description Tab

The Company Description tab is used to provide a description of the company. The field on this tab is supported by the Simple Editor popup.

Logos Tab

The Logos tab is used to specify the logos for the selected company. Each company can have its own Document logo and Heading logo, which are assigned on the Logos tab of the Company Setup process. The dimensions of the Document and Heading Logo images are 206 pixels wide by 74 pixels high and1040 pixels wide by 80 pixels high respectively.

Note: These logos are only used if the Enterprise Header Only check box is not selected in Desktop Setup for the current user type. 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.

Setup Tab

The Setup tab is used to enter fiscal year, format and tax ID information for the company. Fiscal Year information includes the Start and End Dates for the company's fiscal year. Tax ID information includes the Federal Tax ID, State Tax ID, Local-1 & -2 Tax ID, and any other Tax IDs for the company, if any. Other settings that are defined on this tab are listed and described below.

Note: The format settings on the Setup tab of the Company Setup process are always used for output purposes so that documents are standard across the company. For input and display purposes, the user has a choice of using the Date Format specified here or date regional settings of his PC.

- Default Currency
- Social Format
- Phone Format
- Date Format
- Time Format
- Currency Symbol
- Decimal Symbol
- Numeric Separator

Default Currency	The default currency used when printing currency amounts. This field is supported by a Select Currency popup, which lists currencies that have been defined in Enterprise Setup.
Social Format	The format used when displaying and printing social security numbers. Social security numbers are always stored as a sequence of numbers without any formatting characters of any kind. The social security number format specified here determines how social security numbers look when they are actually used. This field uses a table that lists the valid social security number formats. This field is supported by a table with the valid entries shown below.

###-##-####   (US)
###-###-###   (Canadian)

Phone Format	The format used when displaying and printing telephone numbers. Telephone numbers are always stored as a sequence of numbers without any formatting characters of any kind. The phone format specified here determines how phone numbers look when they are actually used. This field is supported by a table with the valid entries shown below.

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

Date Format
The format used when displaying and printing dates. The date fields always use your PC's regional date format settings for input and display on screens. The Date Format setting is only used on documents. You also have the option in the Date Format field to Use Locale, which would then use your PC's regional date format settings for the documents as well. This field is supported by a table with the valid entries shown below.

mm-dd-yyy (MDY with Dash Delimiter)
mm/dd/yyy   (MDY with Slash Delimiter)
dd-mmm-yy   (Alphabetic Month Dash Delimiter)
dd-mm-yyyy   (DMY with Dash Delimiter)
dd/mm/yyy   (DMY with Slash Delimiter)
Use Locale   (Use Locale from Current PC)

Note: You can change your PC's regional settings using the Windows Control Panel and going into the Regional and Language Options. Contact your Support Representative if you have questions on this topic. In People-Trak, only dates are affected by these settings.

Time Format
The format used when printing times. Time is always stored in a standard internal database format. The time format specified here determines what time looks like when it is actually used on a document. This field is supported by a table with the valid entries shown below.

hh:mm
hh:mm AM/PM

Currency Symbol
The symbol used to represent currency when printing currency amounts. This field uses a table that lists the valid currency symbols. There are two valid entries: the dollar sign and 'None'. If the value 'None' is selected, the currency symbol is not used at all.

Decimal Symbol
The symbol used when printing decimals. This field uses a table that lists the valid decimal symbols. The normal decimal symbol is the dot or period. However, this can be changed if desired. In Latin American countries, the decimal symbol is the comma.

Note: This field is currently inactive and is set to display only.

Numeric Separator
The numeric separator used when printing numeric values of 1000 or greater. For example, one million is formatted as 1,000,000 when the numeric separator is a comma. This field uses a table that lists the valid numeric separators. There are three valid entries: the comma (as used in the United States), the dot or period (as used in Latin America) and 'None'. If the value 'None' is selected, numbers are displayed without a separator. For example, one million is displayed as 1000000.

Note: This field is currently inactive and is set to display only.

How Auto-Numbers are Assigned

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

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

Auto-Numbering Tab

People-Trak provides an Auto-Numbering feature that allows the automatic assignment of record numbers for any module within any company. The Auto-Numbering tab is used to activate the Auto-Numbering feature, to specify special prefixes and suffixes for the automatically generated numbers, and to specify or to change the starting numbers for each module within a company.

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

Module
: The module in the company for which to activate and set up the Auto-Numbering feature. This field is for display only.

Active
: A check box that allows you to specify whether or not the Auto-Numbering feature is active. This setting is not permanent and can be activated or deactivated at any time. Select the check box to activate the Auto-Numbering feature for this module in the specified company. Clear the check box to de-activate the Auto-Numbering feature for this module in the specified company.

Prefix
: The prefix to be added at the start of the generated number when the number is assigned. For example, if you wish to use the year as a prefix for applicant numbers, you would enter "2008-" as a prefix. When applicant number 131 is assigned, the actual ID will be "2008-131", which might mean the 131st applicant in the year 2008. Prefixes can be any combination of letters, numbers, and symbols up to ten characters in length. Note that a dash has been used to separate the prefix from the generated number. This is not required nor is it automatic. If you wish to have all numbers start with two leading zeros, for example, you would enter "00" as the prefix and leave out the dash.

Suffix
: The suffix to be added at the end of the generated number when the number is assigned. For example, if you wish to use the year as a suffix for applicant numbers, you would enter "-2008" as a suffix. When applicant number 131 is assigned, the actual ID will be "131-2008", which might mean the 131st applicant in the year 2008. Suffixes can be any combination of letters, numbers, and symbols of up to ten characters in length.

Note: All IDs (employee, applicant, etc.) are initially set to twelve characters in length. If you choose to use large numbers and prefixes and/or suffixes, you may need to increase the length of the applicable ID fields to accommodate the fully generated ID. Field lengths and other field attributes can be modified using the Field Customization feature.

Next #
: The next number to assign when creating a new ID for a record in this module in the specified company. If you do not specifying this number, the next number used when creating an ID will be "1". You can reuse the numbers from deleted or transferred records by changing this number back to a desired starting number. For example, you could set this field back to 1, and then every time a new record is created, any unused number will be used

and any used number will be skipped.

System and Date Variables

The fields listed below are available system variables that can be substituted into reports, letters, labels, and emails. The Company fields are defined on the Identity and Setup tabs in Company Setup..

Company

- Company Address 1
- Company Address 2
- Company City
- Company Fax
- Company Logo
- Company Name
- Company State
- Company Telephone
- Company Zip
- Company Website
- Federal Tax ID
- Local 1 Tax ID
- Local 2 Tax ID
- Other 1
- Other 2
- Other 3
- Other 4
- State Tax ID

Date fields have a powerful feature known as "variable substitution". When creating an equation with a date field, you have the option of entering a date variable into the Contents field rather than an actual date. This is extremely useful in specifications that are to be run on a periodic basis. For example, you may need to create a report that lists the performance reviews due during the current week. Assuming the week is the first week of January 2008, you would enter the equations as shown below.

Review Date	>=	01-01-2008	AND
Review Date	<=	01-07-2008	

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

Review Date	>=	START-OF-WEEK	AND
Review Date	<=	END-OF-WEEK	

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

There are many date variables available. Some date variables can have the number of periods associated with them updated using the Date Variables tab.

Module Setup

People-Trak has up to eleven modules that are used to capture and use data. They are listed below along with the name of the record that is used for each.

• Personnel Management	Employee
• Safety Management	Incident
• COBRA Administration	Recipient
• Benefit Administration	Benefit
• Training Course (optional)	Training Course
• Training Administration (optional)	Class
• Position Control (optional)	Position
• Requisition Tracking (optional)	Requisition
• Applicant Management (optional)	Applicant
• Contact Management	Contact
• Generic Module (optional)	Generic
• Document Management (optional)	Document

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

Note: The Module Setup process utilizes a multiple-tab screen, depending on the module. Because all Module Setup processes have the same standard General tab, the tabs unique to each module will be documented in detail in module-specific guides. In addition, there are tabs that are applicable only when certain options have been licensed.

General Tab

The General tab is used to select the fields that are to be used for lookup and duplicate checking in the current module as well as the default source for creating a record. There is also an option to set the default for lookup to span companies or open a single record on search.

When you are adding or changing a record and the values of the dupe check fields are the same as another record, you will receive a dialog box warning of this possible duplication and the ID of the other record is listed. This is just a warning and the entry you just made is accepted. It is up to you to determine if this duplication is acceptable.

- Lookup Fields 1-4
- Span Companies
- Single Record
- Default Source
- Dupe Check Fields 1-4
- Span Companies
- Add Email to Notes
- Note Category
- Module Name
- Module Phrase
- Save Transaction History
- Link History to Notes

Lookup Fields 1-4 are the fields to be used for record lookup. These fields are supported by the Select Field popup and are used on the Basic tab of the Lookup screen.

Note: Any field that you select as a lookup field will be viewable by all users because Lookup ignores field security. You should never include a field in the Lookup that cannot be viewed by all users. The Lookup fields are the same fields displayed in the grid when multiple matches are found. Make certain that the fields you use are sufficient to properly identify the records you wish to find.

The Span Compenies checkbox allows you to specify whether or not lookup results should span companies. Select the check box to look at all companies when doing lookup. Clear the check box to look only at the current company when doing lookup. Selecting this check box sets the default for lookup in the module. Spanning is only available to Administrators.

The Single Record checkbox allows you to specify whether or not current lookup should only open the highlighted record in the search results. Select the check box to only open the highlighted record in the search results. Clear the check box to open all records in the search results. Selecting this check box sets the default for lookup in the module.

The Default Source is the default source to use when creating records. This field is supported by the Select Record Source popup, which lists the available sources in the current module.

The Dupe Check Fields 1 – 4 are the fields to be used for duplicate checking upon entry and update of records. You specify what fields you want to be compared to determine if the record is a duplicate. These fields are supported by the Select Field popup.

Note: The duplicate checking fields are pre-defined for each module..

The Span Companies checkbox allows you to specify whether or not the current lookup should span companies. Select the check box to span companies. Clear the check box to not span companies, which only shows records from the current company. If spanning is done, a Company column is included in the search results. Spanning is only available to Administrators.

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

The Add Email to Notes check box allows you to specify the default setting for the Add Email to Notes field on the Send Email screen. Select the check box to default the Add Email to Notes field to selected. Clear the check box to not default the Add Email to Notes field to selected. The user still has the option on a per email basis to change that setting. If you plan to create notes for emails that are sent, you can set the default to selected so that individual users will not forget to select the check box when emails are sent. If the Add Email to Notes check box is selected on an email, the email and any applicable attachment will be added to the notes of the record associated with each email address in the To field.

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.

If the Add Email to Notes check box is selected on an email, the Note Cateogry field determines the note category to default for that email and is supported by the list of available security categories. The user still has the option on a per email basis to change that category. If you want to have the user select the note category per email, it is best to leave this field blank, which will force the user to select a category when sending the email.

The Module Name is the name to use for the current module. The standard module name is defaulted, but can be overridden.

The Module Phrase is the phrase to use for the current module. The standard module phrase is defaulted, but can be overridden.

The Save Transaction History check boxt allows you to specify whether or not the transaction history for all workflows in this module should be saved. Select the check box to save transaction history, which in effect is like auditing all fields used on the workflow. Clear the check box to not save transaction history. If you choose to save transaction history for a module, this history is available for viewing in a record by using the Transaction History menu option on the Audit menu or by using the Audit/Transaction History process on the Administration menu.

The Link History to Notes check box allows you to specify whether or not to link transaction history to notes and is only relevant if the Save Transaction History check box is selected. Select the check box to link transaction history to notes. Clear the check box to not link transaction history to notes. If you select the check box, a note with a Note Text of "Transaction History Link" is added to the record when it is saved, and this note has an attachment, which links to the appropriate transaction history. This allows you to easily link to the relevant transaction history. If you choose not to link history to notes, you still have access to that history using the Transaction History menu option when in that record.

Lesson 1
Enterprise Setup

Lesson Contents

This lesson covers some of the key settings in the Enterprise Setup process.

Tutorials

Setting Login Security 1: shows how to set login security at the enterprise level.

Setting Login Security 2: shows how to set login security at the enterprise level.

Changing Header and Logo Appearance: demonstrates how to change the header and logo appearance on reports.

Sharing Documents: shows how the shared document feature works.

Changing Default Report Settings: demonstrates how to change default report settings at the enterprise level. Then shows how these are defaulted when creating an adhoc report.

Setting Report Fonts: shows how to set the fonts to be used on reports within the enterprise.

Tutorial 1.1 – Setting Login Security 1

An enterprise is one discrete implementation of People-Trak. A typical installation of People-Trak will include one Live enterprise and one Demo enterprise. There are several key settings at the enterprise level. The first settings we will cover involve login security.

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

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

   There are several product options that affect menu options and settings. Only the Position Control and Attendance options are selected during this training, but where features are affected, a note is made for your reference. You will learn more about those features in Strategic Technology training classes.

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** and press **TAB** or **ENTER**.

5. In the **Password** field, enter **DEMO** and press **ENTER** or click the **OK** button.

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

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

7. Under the **Login** tab, use the date popup in the **Last Password Change** field to change the date to today's date.

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

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

10. In the **Password Change Days** field, enter **0**.

    This will require you to change your password every time you log in. This is not something you would normally want to do, but we need to do this to demonstrate how the password settings work. In reality, you might want the number of change days to be 30. This would require a user to change his password every 30 days.

    The Days Before Reuse field is currently set to 300. This means that a user cannot reuse

the same password until 300 days have passed. In order to make some demonstrations easier, we need to change this to 0 for this lesson.

11. In the **Days Before Reuse** field, enter **0**.

The Attempts Before Lockout field specifies the number of sets of login attempts allowed before locking the user out of People-Trak. People-Trak allows a user three attempts to log in before leaving People-Trak and requiring the user to run People-Trak again. If you set this field to 2, a user will have a total of six (2 x 3) attempts before getting locked out of People-Trak. An administrator will have to give access back to that user in order for him to access People-Trak again.

12. In the **Attempts Before Lockout** field, enter **2**.

The Grace Logins field specifies the number of logins allowed before locking the user out of People-Trak when a password change is required and has not yet been done. For example, if a user must change his password because the Password Change Days time period has passed, he can log into People-Trak this "grace" amount of times without changing the password. When the user has zero grace logins left and still doesn't change his password upon login, the user will be locked out of People-Trak. An administrator will have to give access back to that user in order for him to access People-Trak again.

13. In the **Grace Logins** field, enter **2**.

We will look at the last two settings in just a minute. For now, let's close the current screen and save your changes. Let's review what you learned in the Introduction to People-Trak training. If you select Exit on the File menu, the screen will close and your changes will be automatically saved. If you click the X in the upper right-hand corner of the screen, you will be asked if you want to save the changes. In this case, you would choose to save.

14. Use either method to close the **Enterprise Setup** screen, saving your changes.

Now let's log off so we can see how these settings affect our security.

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

16. Log back in as **DEMO/DEMO**.

The following message is displayed:

Password has expired and needs to be changed. 2 grace logins remaining.

Your password has 'expired' because the Password Change Days is set to 0.

17. Click **OK**.

The Change Password screen is displayed. We don't want to change your password just yet.

18. Click **Close**.

The following message is displayed:

Password was not changed. You have 1 grace logins remaining.

19. Click **OK**.

    We set Grace Logins to 2, and you just used one. This counter is displayed in User Setup. Let's take a quick look at that.

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

    The User Setup screen is displayed. The Grace Logins Used field should say 1 of 2.

21. Close the **User Setup** screen.

22. Logoff and back in as **DEMO**.

    The following message is displayed:

    Password has expired and needs to be changed. 1 grace logins remaining.

23. Click **OK**.

    The Change Password screen is displayed.

24. Click **Close**.

    The following message is displayed:

    Password was not changed. You have 0 grace logins remaining.

25. Click **OK**.

    Let's find out what happens now.

26. Logoff and back in as **DEMO**.

    The following message is displayed:

    Password has expired and you must change it now.

27. Click **OK**.

    The Change Password screen is displayed. If you chose to be rebellious at this point and close the screen without changing your password, you would be locked out of People-Trak. An HR administrator would have to reactivate your user account before you could log in again. To save some time, we won't demonstrate how that works. Let's be good and change our password now.

28. In **Current Password**, enter **DEMO**.

29. In **New Password** and **Confirm New Password**, enter **TEST**.

    As you type in the password, asterisks are displayed for security purposes.

    While we are in here, let's change the question and answer you want if you forget your password because we are going to give that a whirl soon.

30. In the **Forgotten Password Question** field, enter any question you want.

31. In the **Forgotten Password Answer** field, enter the answer to that question and remember what that is!

    Note: The answer is case sensitive, so how you enter it here is exactly how you will need to enter it later.

32. Click **Submit**.

    The following message is displayed:

    Password has been reset.

33. Click **OK**.

34. Continue with the next tutorial.

Tutorial 1.2 – Setting Login Security 2

Now, let's take a look at those other two user security settings in Enterprise Setup.

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

   The Minimum Length field specifies the minimum character length for a password. For example, if this is set to 6 and you try to enter a password of 5 characters or less, your entry will not be allowed. The values allowed in this field are 4 through 10.

2. In the **Minimum Length** field, enter **6**.

   The Letters and Numbers check box allows you to specify whether or not letters and numbers are required in a password. If you select the check box and then enter only letters or only numbers, your entry will not be allowed.

3. Select the **Letters and Numbers** check box.

   You have made the security criteria stricter. If you want this criteria to go into effect immediately, users with passwords that don't meet that criteria need to change those passwords. The Update Users button finds those users and clears their Last PW Change field, which forces them to change their password upon their next login.

4. Click **Update Users**.

   You will receive a message letting you know that there are users that do not meet these newly set requirements and that those passwords are now required to be changed.

5. Click **OK**.

6. Close the **Enterprise Setup** screen, saving your changes.

   Now let's log off and log back in to see what happens next.

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

8. Log back in as **DEMO/TEST**.

   The following message is displayed:

   Password has expired and you must change it now.

   Your current password of TEST doesn't meet the length or numbers requirement, so you are being forced to change your password on your next login.

9. Click **OK**.

   The Change Password screen is displayed.

10. In **Current Password**, enter **TEST**.

11. In **New Password** and **Confirm New Password**, enter **TEMP**.

12. Click **Submit**.

    The following message is displayed:

    New password is not long enough. Passwords must be at least 6 characters long.

    You specified that the minimum length for a password is 6 characters and you just tried to enter a password that is 4 characters long.

13. Click **OK**.

14. In **New Password** and **Confirm New Password**, enter **TEMPORARY**.

15. Click **Submit**.

    The following message is displayed:

    New password is not a combination of letters and numbers.

    Big brother is watching. Let's follow the rules we set up.

16. Click **OK**.

17. In **New Password** and **Confirm New Password**, enter **ABC123**.

18. Click **Submit**.

    The following message is displayed:

    Password has been reset.

19. Click **OK**.

    Let's change a couple of the password settings back to what they were so we can once again use our standard passwords.

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

21. In the **Minimum Length** field, enter **4**.

22. Clear the **Letters and Numbers** check box.

    These changes will allow us to change back to our DEMO password in just a minute.

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

    We are going to need to log in as the MASTER user in just a bit. When we originally selected the Letters and Numbers check box, all users that didn't meet that criteria (MASTER's password is, you guessed it, MASTER) had the Last PW Change cleared. This was done to force a password change. In order to save ourselves some time later, let's set that Last PW Change date to today so we can use the regular MASTER login.

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

25. Select the **MASTER** user and put in today's date in the **Last PW Change** field.

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

    Now, let's logoff and pretend you forgot your (DEMO's) brand new password of ABC123.

27. Logoff and enter **DEMO** as the **User ID** but do **not** enter the **Password** just yet.

28. Click the **Forgot your password** link below the **Password** field.

    The Forgotten Password frame replaces the image on the right and displays the question you entered.

29. Enter your answer and click **Submit**.

    A simulated email message is displayed showing that the DEMO user was just emailed his password. This message is only shown in our training environment. In reality, the email would have actually been sent.

30. Click **OK**.

    The following message is displayed:

    Your password has been emailed to you. If you do not receive the email, please contact Human Resources for assistance.

31. Click **OK**.

    Now, let's assume that you have received that email and know your password.

32. In the **Password** field, enter **ABC123**.

    The following message is displayed:

    Password has expired and needs to be changed. 2 grace logins remaining.

33. Click **OK**.

    The Change Password screen is displayed.

    Let's change the password back to DEMO since that is our usual DEMO user password. This is why we set Days Before Reuse to 0, which will allow us to use a previously used password right away.

34. Change your password back to **DEMO** and click **Submit**.

    The following message is displayed:

    Password has been reset.

35. Click **OK**.

    Since we are done demonstrating the changing of the password, let's set the Password Change Days back to 999 days so we don't have to keep changing the password for this or other users during our travels!

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

37. In the **Password Change Days** field, enter **999**.

38. Close the **Enterprise Setup** screen, saving your changes.

    Now, let's see how the Attempts Before Lockout setting works.

39. Log off and back in as **DEMO** and type in any password <u>except</u> **DEMO**. Your login attempt will fail. Do this two more times.

    After the third attempt, you will be bounced out of People-Trak and back to your desktop.

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

41. The Select Product Option screen is displayed. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.

42. Click **OK**.

43. Once again, log back in as **DEMO** and type in any password <u>except</u> **DEMO**. Your login attempt will fail. Do this two more times.

    After the third attempt, you will be told that your login attempt has failed and that you must now contact an administrator to log back in.

44. Click **OK** in response to the message, and you will then be bounced out of People-Trak.

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

46. The Select Product Option screen is displayed. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.

47. Click **OK**.

48. Now, try to log back in as **DEMO** and **do** use **DEMO** as the password.

    The following message is displayed:

    Invalid Login

    You have tried to login 2 sets of times. Because you set Attempts Before Lockout to 2, your DEMO user has been set to inactive. We are going to have to log back in as another user in order to reset the DEMO user to active, and here comes the MASTER user to the rescue.

49. Log in as **MASTER/MASTER**.

50. On the **Setup** menu, select **User Setup** and then select the **DEMO** user. Select the **User Active** check box. Close the **User Setup** screen, saving your changes.

51. Log off as **MASTER** and log back in as **DEMO/DEMO**.

   You are alive and well again!

52. Continue with the next tutorial.

Tutorial 1.3 – Changing Header and Logo Appearance

People-Trak provides flexibility in how report headers are formatted. You can set the positions of the company logo and the report title to suit your requirements. Here's how.

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

2. Click the **Document Settings** tab.

   Note that the Header Text Alignment is set to Right and the Logo Alignment is set to Left.

3. On the Tool Bar, click the **Print Screen** button to print an Enterprise Detail Report.

   We are not interested in the information shown, but in the format of the header. As the settings indicated, the header is to the right and the logo is to the left. You can change this. Here's how.

4. Close the **Document Viewer**.

5. Change the **Header Text Alignment** to **Left**. Change the **Logo Alignment** to **Right**.

   In order for these changes to take effect, we need to close the Enterprise Setup screen, saving our changes.

6. Close the **Enterprise Setup** screen, saving your changes.

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

8. Click the **Print Screen** button to print the report again.

   This time the header is to the left and the logo is to the right.

9. Close the **Document Viewer**.

   You can position the header and logo however you wish. In fact, you can actually position them over each other. This might make sense if you have a gray scale logo that you wish to treat similar to a watermark. Our sample logo is hardly a watermark, but let's try this anyway.

10. Set both the **Header Text Alignment** and **Logo Alignment** to display on the **Left**.

11. Close the **Enterprise Setup** screen, saving your changes.

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

13. Click the **Print Screen** button to print the report again.

    Note that the text of the header is displayed over the logo. Again, this may look ugly with this logo, but with a very light logo, the effect might be just what your organization wants.

14. Close the **Document Viewer**.

The logo for each company is set using the Company Setup process. We will learn more about that in the Company Setup lesson.

15. Set the **Header Text Alignment** back to **Right** and leave the **Logo Alignment** set to **Left**.

16. Close the **Enterprise Setup** screen, saving your changes.

17. Continue with the next tutorial.

Tutorial 1.4 – Sharing Documents

People-Trak has been designed to allow documents to be owned or controlled by individual users or by the group as a whole. When People-Trak is shipped, the shared document feature is enabled. This means that the owner of all pre-defined documents has been set to "COMMON" and that all new documents will also be created with the "COMMON" owner. All users can share documents that have a "COMMON" owner.

If the shared document feature is disabled, any new documents will be created with the owner being the current user. Only that user has access to that report. If the user wants to share the report, he can copy that document to another user or choose to make the document common.

Note: The sharing documents feature applies to all documents as well as Database Manager and Import specifications.

Let's see how the shared document feature works.

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

2. Click the **Document Settings** tab.

   Note that the Shared Documents check box is selected. This means that any new documents will have a COMMON owner. Leave this check box selected.

3. Close the **Enterprise Setup** screen.

4. On the **Documents** menu, select **Adhoc Reports**.

5. On the **File** menu, select **New Adhoc Report** or on the Tool Bar, click the **New Adhoc Report** button to start a new document.

   The Adhoc Reports screen is displayed.

   The purpose of visiting this screen is to review the document properties and create a new report.

6. On the Tool Bar, click the **Adhoc Report Properties** button.

   Note that the Document Owner is COMMON.

7. Close the **Properties – Adhoc Report** screen.

8. Change the **Document Name** to **Common Report**.

9. Change the **Explorer Category** to **General**.

10. Close the **Adhoc Reports** screen, saving your changes. Close the **Explorer**.

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

12. On the **Document Settings** tab, clear the **Shared Documents** check box.

13. Close the **Enterprise Setup** screen, saving your changes.

14. On the **Documents** menu, select **Adhoc Reports**.

15. On the Tool Bar, click the **New Adhoc Report** button. On the Tool Bar, click the **Adhoc Report Properties** button.

    Note that the Document Owner is DEMO, which is your user name.

16. Close the **Properties – Adhoc Report** screen.

17. Change the **Document Name** to **Demo Report**.

18. Change the **Explorer Category** to **General**.

19. Close the **Adhoc Reports** screen, saving your changes.

    Both of these reports were saved in the General category. As the DEMO user, you should now see both the Common Report and the Demo Report in that category. Note the owners listed in the Owner column on the right.

20. Close the **Explorer**.

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

22. Log back in as **MASTER/MASTER**.

23. On the **Documents** menu, select **Adhoc Reports**.

24. Click on the **General** category in the list on the left.

    You should be able to see the Common Report listed in the General category but not the Demo Report. You can only see reports with an Owner of COMMON or MASTER. The Demo Report has an Owner of DEMO, so you cannot see it.

25. Close the **Explorer**.

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

27. Log back in as **DEMO/DEMO**.

    As the owner of the Demo Report, you can choose to copy it to another user or make the document common to all users. Let's see how this is done.

28. On the **Documents** menu, select **Adhoc Reports**.

29. In the **General** category, highlight your **Demo Report**.

30. On the **File** menu, select **Copy Adhoc Report to User**.

    The Copy Document to User screen is displayed.

31. In the **To User ID** field, use the popup to display a list of users, as well as a COMMON user.

    Let's transfer your Demo Report to the MASTER user.

32. Select **MASTER** and then click **Copy**.

    Your Demo Report has now been copied to the MASTER user. To save time, we won't

actually log over to MASTER to see that the Demo Report is now visible for him with an owner of MASTER.

There is now a Demo Report owned by MASTER and the original Demo Report owned by you, the DEMO user. These are two separate reports. If you change your Demo Report, it will not affect the MASTER user's copy and vice versa.

Now, let's see what happens when we select the COMMON user.

33. On the **File** menu, select **Copy Adhoc Report to User**.

34. In the **To User ID** field, enter **COMMON** and then click **Copy**.

A copy of the Demo Report is created and the owner set to COMMON. Note that you now see the Demo Report twice in the list of reports. One is the original Demo Report that you own and the other is the common report that everyone owns. The Owner column makes this clear. If you want to keep your own version of the Demo Report and have it common as well, you can.

Note: The COMMON user is just used for this feature and is not an actual user of People-Trak.

35. Close the **Explorer**.

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

Let's enable sharing of documents again.

37. On the **Document Settings** tab, select the **Shared Documents** check box.

38. Close the **Enterprise Setup** screen, saving your changes.

39. Continue with the next tutorial.

Tutorial 1.5 – Changing Default Report Settings

Report preferences are used to set the defaults when adhoc reports are first created. When the defaults are set as desired, the process of creating an adhoc report as desired is greatly simplified.

1. On the **Documents** menu, select **Adhoc Reports** and start a new document.

   The Adhoc Reports screen is displayed. The purpose of visiting this screen is to review the default settings.

2. On the **Specification** tab, look at the default settings for the last five fields.

   These defaults are set with the Enterprise Setup process.

3. Click the **Report Definition** tab. In the first row of the **Field Name** column, enter **Full Name**.

4. On the Tool Bar, click the **Run** button to run the report.

   The defaults for Orientation (Portrait), Spacing (Single), Alignment (Left), Show Gridlines (off) can be seen. The Auto Format feature is also on but you cannot tell that unless you had a very wide report, which you do not in this simple test.

5. Close the **Document Viewer**, the **Adhoc Reports** screen, and the **Explorer**.

   Note: No mention was made about saving changes as you left the Adhoc Reports screen because when you run any document (Adhoc Report, Audit Report, etc.); it is automatically saved as part of that process.

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

7. Click the **Document Settings** tab.

   The last five fields on the right are the defaults for the last five fields on a report's Specification tab.

8. Change **Default Spacing** to **Double**. Select the **Show Gridlines** check box.

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

10. On the **Documents** menu, select **Adhoc Reports** and start a new document.

    The Adhoc Reports screen is displayed. This time, the defaults are different.

11. On the **Report Definition** tab, enter the **Full Name** field.

12. Run the report.

    Note that the spacing and gridlines settings now reflect the new defaults that you have set. All reports created from this point forward will have these settings.

13. Close the **Document Viewer**, the **Adhoc Reports** screen, and the **Explorer**.

14. On the **Setup** menu, select **Enterprise Setup**. Click the **Document Settings** tab.

    Let's change the settings back to what they were originally.

15. Change **Default Spacing** back to **Single**. Clear the **Show Gridlines** check box.

16. On the Tool Bar, click the **Save** button and stay in the **Enterprise Setup** screen.

17. Continue with the next tutorial.

Tutorial 1.6 – Setting Report Fonts

In order to promote a standard "look" to reports throughout the enterprise, report fonts are specified at the enterprise level by specifying the font name, style, size and color to use for the heading, body and totals sections of a report. This is done on the Document Settings tab of the Enterprise Setup process. The only way a user can override these settings is if that user is allowed access to design mode in the Security Setup process. Let's see how this works.

1. You should still be on the **Document Settings** tab in the **Enterprise Setup** screen.

   Note that the Heading Font, Body Font and Totals Font frames currently have the same Name, Style and Size. Their only difference is the Color: Heading-Blue, Body-Black and Totals-Red. We will leave these settings as is.

2. Close the **Enterprise Setup** screen.

3. Create a new Adhoc Report.

   The Adhoc Reports screen is displayed.

4. On the **Report Definition** tab, add the **City** field to the report with a **Sort Type** of **Break**, **Sort Order** of **Ascending**, and **Calculation** of **Count**. Add the **Last Name** field.

5. Run the report.

   Note how the heading is in blue, the body in black and the totals in red.

6. Close the **Document Viewer**, the **Adhoc Reports** screen, and the **Explorer**.

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

8. Click the **Document Settings** tab.

   Let's make some changes.

9. In the **Heading Font** frame's **Name** field, click the **Font** popup button.

   The Select Font screen is displayed.

10. Set **Font Style** to **Bold** and **Font Size to 12**. Click **OK**.

11. In the **Body Font** frame's **Color** field, click the **Color** popup button.

    The Select Color screen is displayed.

12. Select **Cyan**.

13. In the **Totals Font** frame's **Color** field, click the **Color** popup button.

    The Select Color screen is displayed.

14. Select **Orange**.

15. Close the **Enterprise Setup** screen, saving your changes.

16. Create another Adhoc Report.

    The Adhoc Report screen is displayed.

17. On the **Report Definition** tab, add the **City** field to the report with a **Sort Type** of **Break, Sort Order** of **Ascending,** and **Calculation** of **Count**. Add the **Last Name** field.

18. Run the report.

    Note how the heading is in now larger and bold, the body is in cyan color and the totals are in orange.

19. Close the **Document Viewer**, the **Adhoc Reports** screen, and the **Explorer**.

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

21. Click the **Document Settings** tab.

    Let's change the fonts back to what they were.

22. In the **Heading Font** frame's **Name** field, click the **Font** popup button. Set the **Font Style** to **Regular** and the **Font Size** to **10**. Click **OK**.

23. In the **Body Font** frame's **Color** field, click the **Color** popup button and select **Black**.

24. In the **Totals Font** frame's **Color** field, click the **Color** popup button and select **Red**.

25. Close the **Enterprise Setup** screen, saving your changes.

26. Continue with the next tutorial.

Notes

Lesson 2
Company Setup

Lesson Contents

This lesson covers key settings in the Company Setup process.

Tutorials

Adding/Deleting Companies: describes how to add and delete companies.

Changing Company Logos: shows how to change the company logos.

Changing Formats: demonstrates how to change some of the formats related to a company.

Using Auto-Numbering: shows how to use the auto-numbering feature.

Tutorial 2.1 – Adding/Deleting Companies

A People-Trak enterprise can have multiple companies. People-Trak comes with two pre-defined companies: ACTIVE and ARCHIVE in both the Live enterprise and Demo enterprise. You can also define additional companies. This tutorial describes how to add and delete companies.

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

   The Company Setup screen is displayed.

2. On the **File** menu, select **New Company** or on the Tool Bar, click the **New Company** button to create a new company.

   A new company is created with a temporary Company Code of "NEW-" concatenated with the next sequential number available. In our case, that Company Code is NEW-1 since that code did not exist yet.

   Your new company is now your current company for editing purposes. At this point you would enter all the information for this new company, but let's demonstrate the Copy Company feature to see how this can save you some time if you have an existing company that is similar to the new company you want to create. Let's assume the company that is similar to the one we want to create is the ACTIVE company.

3. Highlight the **ACTIVE** company.

4. On the **File** menu, select **Copy Company**.

   A new company is created with a Company Code of ACTIVE-1, which is the Company Code of the company you copied concatenated with a dash and the next sequential number available. In addition, the settings for the ACTIVE company are copied to the new company. You can look at the other tabs if you wish to verify this.

   One of the first things you want to do after creating a new company is to assign it a meaningful company code.

5. Change the **Company Code** from **ACTIVE-1** to **TDI**.

   The next thing you would do is to go through and change any settings that are different for the TDI company. We'll save you that effort and assume you have done so.

6. On the **File** menu, select **New Company** to create another new company. Note that the **Company Code** is **NEW-2** because **NEW-1** already exists.

   Companies can easily be deleted, and we will readily delete these three new companies now. However, in real practice, a company could contain a vast amount of information you may wish to keep. It would be a rare situation in which you would delete a company that contained valid information.

7. Delete the company named **TDI** by first selecting that company. Then on the **File** menu, select **Delete Company** or on the Tool Bar, click the **Delete Company** button to delete the company. You will be asked to confirm the deletion. Go ahead and delete the company. Now select and delete **NEW-1** and **NEW-2**.

8. Continue with the next tutorial.

Tutorial 2.2 – Changing Company Logos

Each company can have its own logos. There is one logo for documents and another for desktop headings. The document logo is limited to a width of 3 inches while the heading logo can be up to a width of almost 15 inches. People-Trak is shipped with temporary logos for each company that you will want to change. Here's how.

1. Click the **Logos** tab.

   We will leave the Document Logo as is and change the Heading Logo.

2. Click in the **Heading Logo** field.

   Two popup buttons are displayed next to the Heading Logo field.

3. Hover over the leftmost popup button.

   The Select Image tooltip is displayed.

4. Click this popup button.

   The Select File screen is displayed.

   You can now use the explorer to find the file that contains the logo image. This graphic should be sized to no more than 1040 pixels wide by 74 pixels high using an image editor or it will be cropped when it is stored in People-Trak. Once selected, the logo is stored within the People-Trak database and the original file is no longer required.

   Note: You can verify what the maximum size is for an image field by looking at its field help, which is available when in that field by pressing F1, selecting Field Help from the Help field, or clicking the Help button on the Tool Bar.

   For demonstration purposes, we are going to temporarily change the logo for the ACTIVE company to the one used for our ARCHIVE company.

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

   You are returned to the Company Setup screen and should see the new logo in the Heading Logo field. Let's see how this logo looks from the Organizer desktop.

6. Close the **Company Setup** screen, saving your changes.

   You can see the new logo in the header of the Organizer desktop.

7. On the **Setup** menu, select **Company Setup**. Click the **Logos** tab.

   For those organizations that do not wish to use a company logo, the logo can be cleared. Let's try that.

8. In the **Heading Logo** field again, hover over the rightmost popup button.

   The Clear Image tooltip is displayed.

9. Click this popup button.

   You should see the image cleared so the there is no longer anything in the Heading Logo field.

   Let's bring back our original logo.

10. 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_ACTIVE_BANNER.JPG**.

    You should see the original logo back in the Heading Logo field.

11. Close the **Company Setup** screen, saving your changes.

    The original logo is now displayed in the header.

12. Continue with the next tutorial.

Tutorial 2.3 – Changing Formats

People-Trak has various pre-defined formats for social security numbers, telephone numbers, dates, times, and currency values. All data is stored in the People-Trak database unformatted. The formatting is applied when the data is retrieved and displayed on the screen or in reports. Because the formatting is applied when needed, it is possible to have different formats for different companies and to change the formats at any time. Let's do this now.

1. Open **Donald Stern's** record. On the **Personal** screen, note the format for the social security number, telephone numbers, and dates. Then close the record.

2. On the **Setup** menu, select **Company Setup**. Click the **Setup** tab. In the **Social Format** field, switch to the **00#-###-###** (Canadian) format. In the **Phone Format** field, select one of the other phone formats. In the **Date Format** field, select one of the other date formats (except Use Locale, which we will learn about in just a minute).

3. Close the **Company Setup** screen, saving your changes.

4. Open **Donald Stern's** record again.

   Note the social security number field. It is now formatted according to the selected format. The same is true for the telephone numbers. The same will also be true for these fields when they are used in reports.

   The date fields have not been changed to the Date Format you selected. This is because date fields always use your PC's regional date format settings for input and display on screens. The Date Format setting is only used on documents. This allows users to enter dates in their local format while dates can be standardized across the company on output to documents. Here's a scenario when this feature would be very helpful. You might be a Brit working for a US company and want to be able to input and display information in the date format to which you are accustomed. You could have your PC set to do dates in the dd.mm.yyyy format, while the Company Setup has dates in mm.dd.yyyy format. You also have the option in the Date Format field to Use Locale, which would then use your PC's regional date format settings for the documents as well. The choice is yours.

   Note: You can change your PC's regional settings using the Windows Control Panel and going into the Regional and Language Options. We won't take the time now to have you make that journey, so if this is something you are interested in doing, contact your Support Representative if you have questions on this topic. In People-Trak, only dates are affected by these settings.

   Remember, data is actually stored unformatted. It is formatted when it is actually displayed or printed. Thus, you can change the format at any time and the data will always be formatted correctly.

5. To demonstrate this, change the formats back to their original values using the **Company Setup** process. Save the changes and then open **Donald Stern's** record again.

   Note that everything is back to how it was when we started this exercise.

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

7. Continue with the next tutorial.

Tutorial 2.4 – Using Auto-Numbering

Each module within a company can utilize the Auto-Numbering feature. The Auto-Numbering feature automatically assigns employee numbers, applicant numbers, position numbers, etc., based on a formula you provide.

When auto-numbering is not in use and new records are created, People-Trak assigns a new employee, applicant or position ID using a basic formula. The phrase NEW followed by a number is applied as the ID. The number is determined by checking the previous use of NEW IDs and using the next available number. Let's illustrate this.

1. Click the **New Employee** shortcut.

    The Create Employee screen is displayed with the Employee Source field set to Scratch. You will learn more about this screen in Data Entry training. For now, we will just create a new employee from scratch. Whenever you are asked to create a new employee in this training, simply click Create when this screen is displayed.

2. Click **Create**.

    The Employee ID NEW1 is automatically assigned.

3. On the Tool Bar, click the **New Employee** button and create another employee record. This time the **Employee ID** is **NEW2**. Create another new record and the **Employee ID** will be **NEW3**.

4. Using the **Delete Employee** option on the **File** menu, delete the three records we just created. Then create a new record again.

    The Employee ID will not be NEW4, but will be NEW1 again, because NEW1 is available because the previous record of the same Employee ID was deleted.

5. Delete the **NEW1** record.

    What you have just seen is not the Auto-Numbering feature in People-Trak. These IDs are simply temporary until you assign a permanent ID, which is usually the first step performed after a record is initially created. Here's how the real Auto-Numbering feature works.

6. On the **Setup** menu, select **Company Setup**. Click the **Auto-Numbering** tab.

    For each company defined, this tab provides a grid where you can activate and use automatically generated numbers for each module. Your current company, ACTIVE, is highlighted.

7. In the **Active** column of the grid for the **Personnel Management** module, select the check box to activate auto-numbering for the module. In the **Next #** column, enter **1000**. This will make **1000** the next number to be assigned. Close the **Company Setup** screen, saving your changes.

8. Use the **New Employee** shortcut to create a new employee.

    The Employee ID 1000 is automatically assigned.

9. Create another new employee.

   The Employee ID 1001 is automatically assigned.

10. Close any open records.

11. Return to the **Company Setup** process and click the **Auto-Numbering** tab.

    Auto-numbering can include an optional prefix and an optional suffix. Here is how you do it.

12. In the **Prefix** column for the **Personnel Management** module, enter **2008-** to indicate that this number was assigned in the year "2008". The dash is necessary to keep the numbers from running together. In the **Suffix** column, enter **-AB**, which is just an arbitrary value for testing. Close the **Company Setup** screen, saving your changes.

13. Use the **New Employee** shortcut to create a new employee.

    The Employee ID 2008-1002-AB is automatically assigned.

14. Create another new employee.

    The Employee ID 2008-1003-AB is automatically assigned. The Prefix and the Suffix are added to the incrementing Employee ID each time a new record is created.

    You do not need to use a prefix or a suffix, but you can use either one. If you do use a prefix and a suffix, make certain that the ID field is long enough to store the generated ID. By default, ID's in People-Trak are 12 characters in length. If the generated number is greater than 12, characters from the ID may be truncated. If you need a longer ID, simply use the Screen/Field Customization process (you'll learn more about this later) to increase the length of the appropriate ID field in the module with which you are working.

    Auto-Numbering can be activated or deactivated at any time.

15. Use the **Company Setup** process to deactivate Auto-Numbering for the **Personnel Management** module in the **ACTIVE** company. All you need to do is clear the **Active** check box.

    If the check box is not checked, the starting number and other values are ignored.

    As you have seen, a company can activate or deactivate auto-numbering per module. For example, it is possible to use auto-numbering for applicants, but not for employees. Auto-numbering is also per company, so one company can use auto-numbering for applicants while another company does not.

16. Close the **Company Setup** screen, saving your changes.

17. Continue with the next tutorial.

Notes

Lesson 3
Module Setup

Lesson Contents

This lesson covers how to change the Lookup and Dupe Check fields for a module..

Tutorials

Changing Lookup Fields: shows how to change the fields used on the Lookup screen for a module.

Changing Dupe Check Fields: demonstrates how to change the dupe check fields, which are used to check for duplicates when entering or updating records.

Tutorial 3.1 – Changing Lookup Fields

The fields used to lookup records on the first tab of the Lookup screen as well as those used for workflows are preset within each module, but can be changed at any time. This is how you do it.

1. Use the **Open Employee** shortcut to start the **Lookup** process.

   Note that the order of the lookup fields on the Basic tab is Employee ID, Last Name, First Name, and Department Name.

2. Click the **Search** button to select a group of records.

   Note that the first four fields in record grid match the lookup fields by name and order.

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

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

   The Lookup and Create frame on the General tab contains four fields in which to record the fields to be used for lookup. Note that the list matches the list you verified in the first few steps. Let's change the list now.

   If you are the type of person that remembers employee names rather than employee numbers, you may find that having the Employee ID as the first lookup field forces you to move the cursor down one field so that you can perform a lookup by last name. Let's fix that situation by changing the order of the first two fields.

5. Click the button adjacent to **Lookup Field 1** to display a list of the fields. Select the **Last Name** field.

   This will make the Last Name field the first lookup field (as well as the second lookup field).

6. Change the second field to the **Employee ID**.

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

8. Use the **Open Employee** feature to start the **Lookup** process.

   Note that the order of the lookup fields on the Basic tab reflects the changes you have made.

9. Click the **Search** button to select a group of records.

   Note that the four fields in the record grid match the modified order as well.

10. Close the **Lookup Employee** screen.

11. Use the **Module Setup** process to reset the original lookup field order. Stay in that process for the next tutorial.

    In this tutorial, we modified the first two lookup fields. You can actually change all four to any desired value, and you can change them again at any time.

The lookup field changes made with the Module Setup process apply to all users throughout the module. It is not possible for each user to have personal lookup preferences. Also, as you learned earlier, any field that you select as a lookup field will be viewable by all users because Lookup ignores field security. You should never include a field in the Lookup that cannot be viewed by all users.

12. Continue with the next tutorial.

Tutorial 3.2 – Changing Dupe Check Fields

People-Trak provides a powerful method of checking for similar or duplicate records when you are adding new employees, applicants, positions, etc. You can create a dupe-check sequence of up to four fields to correctly identify non-unique values. For example, if you wish to compare records using first name and last name, you are going to receive false duplicates because many people share the same first and last name. If you add the telephone number to the first and last name, the combination is more likely to be unique because the odds of two people having the same name and the same telephone number are low. If there is a match on this combination, you probably have a duplicate record (or you are dealing with two family members).

You might also wish to use just a single field for duplicate checking. Many companies use the Social Security Number to verify duplicate applicants or duplicate employees. Not only does this identify potential duplicate records, it might also identify persons who are illegally using the same number or who have stolen or guessed another person's number.

1. You should still be in the **Module Setup** process with the **General** tab displayed.

    The Dupe Check frame on the General tab contains four fields and one check box that are used to establish duplicate checking rules for the Personnel Management module. Identical fields can be found in Module Setup for each of the other modules.

    The four fields are used to define the duplicate checking fields. The check box is used to activate or deactivate company spanning. In most instances, you will wish to activate spanning. With spanning active, you can be sure that applicants or employees do not exist in another company that is either active or which contains archived information.

    As you can see, the first three fields have been set as described at the beginning of this tutorial. We have defined dupe check rules using the Last Name, First Name, and Home Phone fields. And we are spanning companies.

2. Close the **Module Setup** screen.

3. Use the **New Employee** shortcut to create a new employee record. Set the **First Name** to **Donald** and the **Last Name** to **Stern**.

    No duplicate has been found because while we do have another Donald Stern, that Donald Stern does not have a blank telephone number.

4. Now, set **Home Phone** to **(760) 727-2557**. (You can save yourself some typing and just enter the numbers. People-Trak will format it for you after you leave the field. Either data entry method works.) When you press **TAB** or **ENTER** to leave the field, the duplicate checking rules are applied. Because there is a duplicate record, the following message is displayed:

    This appears to be a duplicate of Record ID: 1006

    In Company: ACTIVE

5. Click **OK**.

    When the duplicate is identified, no further action is taken. That is up to you. It could be that there is an error, or further research may be required. You can save the record or add to it or modify it later with the duplicate condition.

In our case, we are just going to delete this record.

6. On the **File** menu, select **Delete Employee** and delete this duplicate record.

   Let's transfer a record to the ARCHIVE company in order to show how spanning works in duplicate checking.

7. Open **Anna Belamonte's** record. On the **File** menu, select **Transfer Employee**.

   The Transfer screen is displayed.

8. In the **Transfer Type** field, enter **Current Record**. In the **Transfer To** field, enter **ARCHIVE**. Click **Transfer**.

   With Anna in the ARCHIVE database, we can now demonstrate the spanning feature.

9. Create a new record. Set the **First Name** to **Anna** and the **Last Name** to **Belamonte**. Now set **Home Phone** to **(619) 749-3971**. When you press **TAB** or **ENTER** to leave the field, the duplicate message will be displayed. However, the company indicated will not be **ACTIVE**, which is the current company, but **ARCHIVE** which is the company in which Anna's record resides. Delete **Anna's** new record.

   Let's get Anna back to the ACTIVE company.

10. On the **File** menu, select **Select Company**. Select **ARCHIVE**.

11. Click the **Open Employee** shortcut and then click **Search**.

   Since Anna is the only employee in Archive, her record is automatically selected for you.

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

   The Transfer screen is displayed.

13. In the **Transfer Type** field, enter **Current Record**. In the **Transfer To** field, enter **ACTIVE**. Click **Transfer**.

   Anna is now back in the ACTIVE company.

14. On the **File** menu, select **Select Company**. Select **ACTIVE**.

15. On the **Setup** menu, select **Module Setup**. Set **Dupe Check Field 1** to **Social Security**. Clear the other **Dupe Check** fields. Leave the **Span Companies** check box selected. Close the **Module Setup** screen, saving your changes.

16. Create a new employee record. Position directly to the **Social Security #** field and enter **123-43-2178**. Press **ENTER** and see what happens.

   The duplicate warning is displayed because this is the Social Security Number for Donald Stern. It would appear that another person is attempting to use his number or you entered the number incorrectly.

17. Delete this new record.

    Let's set our dupe check fields back to what they were originally.

18. On the **Setup** menu, select **Module Setup**. Set **Dupe Check Field 1** to **Last Name**. Set **Dupe Check Field 2** to **First Name**. Set **Dupe Check Field 3** to **Home Phone**. Leave the **Span Companies** check box selected. Close the **Module Setup** screen.

19. Continue with the next tutorial.

Notes