

Strategic Series-7004

Document Management

Version 9.0

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Workbook

Introduction to Document Management

The Document Management module has been added to People-Trak and is included as part of the Strategic Toolkit option. This module provides you with an enhanced ability to track and define documents that have been attached via Archived Documents or Category Notes. In addition, documents may be created in this module independent from the archive document or notes features. Within the Document Management module, you also have the ability to search across modules using one of the appropriate search tag fields.

Document Screen

ID and Name Frame

Document ID	A number or phrase that uniquely identifies the document in the current database. If you try to add a document with an existing ID, or if you try to change the ID of an existing document to an existing ID, you will not be allowed to proceed. In addition, the document ID field is mandatory. A document record cannot be saved unless a document ID has been specified. If you have activated the Auto-numbering feature, the next document number is automatically assigned when you first create a new document record. The format for an auto-number ID is defined for the Document Management module using the Module Setup program.
Document Name	The name of the document. If the document originated in category notes or the document management module, this field will be defaulted to New Document and may be modified. If the document originated from an archived document, this field is defaulted to the name of the archive document. It is display only and cannot be modified.
Module Name	The module in which the document was created. This field is display only and cannot be modified.
Search Tag 1	A user defined text field used to define search criteria for the document.
Search Tag 2	A user defined text field used to define search criteria for the document.
Search Tag 3	A user defined text field used to define search criteria for the document.
Search Tag 4	A user defined text field used to define search criteria for the document.

Document Frame

Document Category	The category into which the document is to be placed. This category can be used to secure documents. This field is for display only and cannot be modified. A table that contains all of the existing organizer categories for the current module supports this field. You can only select a valid entry from the table.
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Document Creator	Indicates the User ID of the People-Trak user who created the document. This field is for display only and cannot be modified.
Document Date	Indicates the date that the document was created. This field is for display only and cannot be modified.
Document Text	The text of the document. If the Document Type is Archived Document, the text will reflect what was written in the Description field. If the Document Type is Note, the text will display what was written in the Note Text field. If you wish to display or enter additional lines, use the multi-line editor popup button to display the entire text of the note.
Attachment Type	Indicates the type of file attached to this document, if any. If a document has an attachment, you can activate the attachment and start the product used to create or edit the attachment by clicking the Show Attachment button. For example, if you have attached a Microsoft Word document, the Type will be DOC or DOCX. You can then click the Show Attachment button, which will start Word and load the attached document.

Attachment Buttons

There are four attachment buttons available on the right hand side of the Documents screen. The Attach button allows you to select the file to attach to the document. The Delete button is available when a document has an attachment and allows you to delete the attached file. The Show button is available when a document has an attachment, and allows you to show the attachment. The Scan button allows you to utilize your own scanner to attach a scanned image.

Detail Button

The screen provides access history for the document and includes the following fields.

Revisit Date	The date the attached document is to be revisited. This field is supported by the Select Date popup.
Revisit Text	The text associated with the Revisit Date. A multi-line editor popup is available for this field.
Retention Months	The number of months the document is to be retained for.
Expiration Date	The date on which the attached document expires. This field is supported by the Select Date popup. If a value has been entered for Retention Months, the Expiration Date field is automatically derived by adding the Retention Months to the current date.
Expiration Text	The text associated with the Expiration Date. A multi-line editor popup is available for this field.

History Button

The screen provides access history for the attachment and includes the following fields.

Action Date	The date the attachment action occurred.
Action Time	The time the attachment action occurred.
Action Type	The comment showing the action performed to the attachment. The comment can be one of the following: <ul style="list-style-type: none">• Attached A document was attached.• Deleted An attachment was deleted.• Opened An attachment was viewed.
Accessed By	The User ID of the user that accessed the attachment.

Archived Documents and Category Notes

With the implementation of Strategic Toolkit, when a document is archived or note is created, it is stored as a record within the Document Management module. Archived documents are still accessible via Archived Documents on the Documents menu and notes are available within Category Notes within modules.

Within Archived Documents and Category Notes, there are additional fields that are captured and fields that need to be defined for use within triggers and search criteria.

Output to Archive Screen

The Search and Retention frame and the associated fields are available on the Output to Archive screen with the implementation of Strategic Toolkit.

Search and Retention

The Search and Retention frame and the following fields allow the user to define search , revisit, and retention criteria for the archive document within Document Management.

- Search Tag 1 A user defined text field used to define search criteria for the document.
- Search Tag 2 A user defined text field used to define search criteria for the document.

- Revisit Date The date the attached document is to be revisited. This field is supported by the Select Date popup.

- Revisit Text The text associated with the Revisit Date. A multi-line editor popup is available for this field.

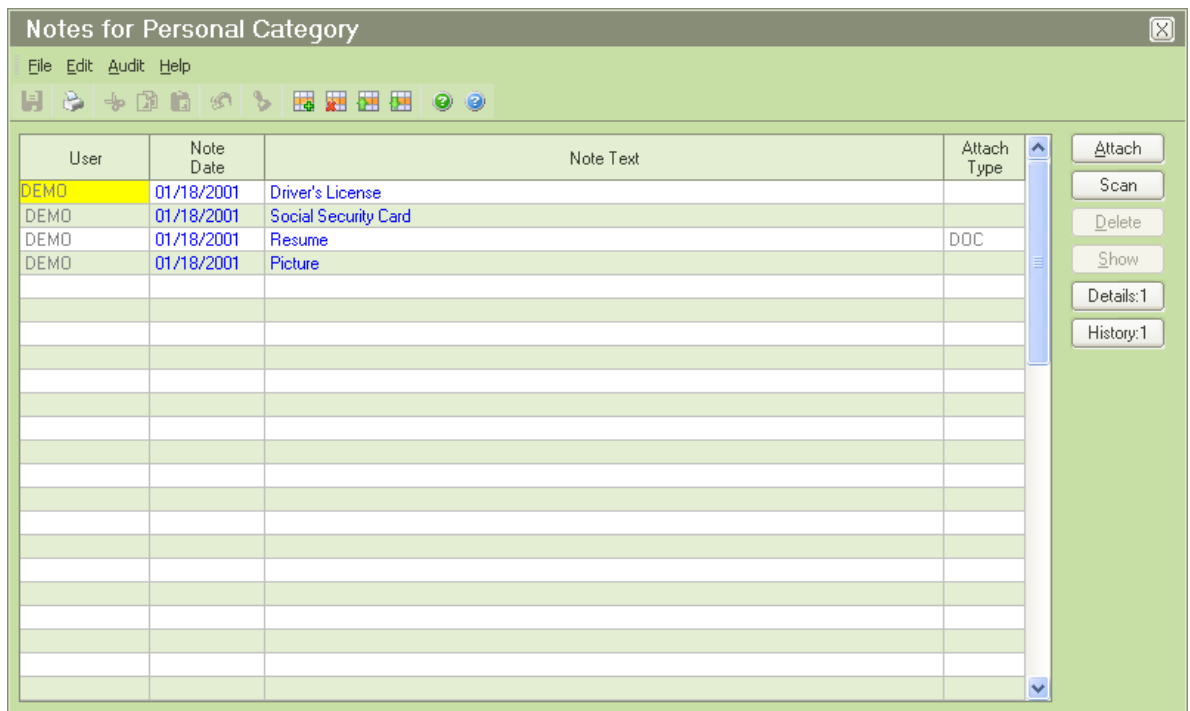
- Retention Months The number of months the document is to be retained for.

- Expiration Date The date on which the attached document expires. This field is supported by the Select Date popup. If a value has been entered for Retention Months, the Expiration Date field is automatically derived by adding the Retention Months to the current date.

- Expiration Text The text associated with the Expiration Date. A multi-line editor popup is available for this field.

Category Notes Screen

With the impmenation of Strategic Toolkit, the Detail and History buttons are added to the Category Notes screen.



Detail Button

The Details button displays the Detail screen for the selected note. The screen includes the following fields.

- Search Tag 1 The source ID, which is the ID of the record that the note was created in. For example, if a note was made in Donald's employee record, the Search Tag 1 would be his Employee ID which is 1006. This field is display only and cannot be modified.

Search Tag 2	The description associated with the source ID of the record that the note was created in. For example, when a note is created in Donald Stern's record, the Search Tag 2 will default to the description, which is his name: Stern, Donald E. This field is display only and cannot be modified.
Revisit Date	The date the attached document is to be revisited. This field is supported by the Select Date popup.
Revisit Text	The text associated with the Revisit Date. A multi-line editor popup is available for this field.
Retention Months	The number of months the document is to be retained for.
Expiration Date	The date on which the attached document expires. This field is supported by the Select Date popup. If a value has been entered for Retention Months, the Expiration Date field is automatically derived by adding the Retention Months to the current date.
Expiration Text	The text associated with the Expiration Date. A multi-line editor popup is available for this field.

History Button

The History button displays the History screen for the selected note. The screen provides access history for the note attachment and includes the following fields.

Access Date	The date the attachment action occurred.
Access Time	The time the attachment action occurred.
Access Type	The comment showing the action that occurred with the attachment. The comment can be one of the following: <ul style="list-style-type: none">• Attached A document was attached.• Deleted An attachment was deleted.• Opened An attachment was viewed.
Access By	The User ID of the user that performed the action.

Lesson 1

Document Management 1

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This lesson covers creating and viewing note attachment history and how to create triggers based on dates within note details. It concludes by showing how to define search tags and specify date details within an archived document.

Tutorials

Note Attachment History: demonstrates how to create and show attachment history within Category Notes.

Revisiting an Attachment: shows how to create an alert trigger for an attachment using the Revisit Date.

Defining Details for Archived Documents: demonstrates how to define search tag criteria and expiration dates within archived documents.

Tutorial 1.1 – Note Attachment History

In Data Entry training, we learned how to use the notes feature to keep track of notes and important documents that had been attached to them.

Donald Stern was issued a company car in order to facilitate a carpool with his coworkers. To be on the safe side, HR has requested a copy of his license to have on file.

Many times when photocopies are made, they get lost in the piles of paper on a desk or are found crumpled in the back of a file cabinet. But why waste paper and file cabinet space when we can just add an image as attachment into Donald's notes? Let's give it a try and take a closer look at the attachment history and details features.

1. Open **Donald Stern's** employee record.
2. On the **Personal** screen, select the **Category Notes** button to display the **Notes for Personal Category** screen.
3. Insert a new note row.
4. In the **Note Text** field, enter the following:

Donald Stern drivers license image

All that's left to do is attach the image that we want.

5. Select the **Attach** button.

The Select File screen is displayed.

6. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the **PETE.JPG** file.
7. Select the **Save** icon on the toolbar to save the latest change.

Whenever you open, delete, or add an attachment to a note, the action is added to the History log. With our image attached, we can take a look at the history that has been created so far.

8. Select the **History** button.

The History screen is displayed with an "Attached" history action. In addition, we can also see the date, time and user who attached the file.

9. Close the **History** screen.

Before we move on, let's take a look at Donald's driver's license.

10. Select the **Show** button.

Whoops! It seems we selected an image of our good friend Pete instead of Donald's driver's license. We can fix this mistake by deleting the current attachment and then attach the correct one.

11. Close the attachment and return to the **Notes for Status Category** screen.

12. Select the **Delete** button located to the right of the notes grid

With the image deleted, we can now attach the file we should have the first time around.

13. Select the **Attach** button.

The Select File screen is displayed.

14. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the **DONALDSTERN_DL.JPG** file.

15. Select the **Save** icon on the toolbar to save the latest change.

This time, the correct file has been attached. After making all these changes, let's see how our attachment history has been affected.

16. Select the **History** button.

Note that we have now added an opened, delete, and attached action to our attachment history.

17. Close the **History** screen.

Viewing attachment history not only keeps track of actions performed to a note over time, it can be beneficial in regards to note security. If you notice suspicious actions being performed during non working hours, you may be identifying a potential security threat.

18. Close the **Notes for Personal Category** screen and **Donald's** employee record, saving your changes.

19. Continue with the next tutorial.

Tutorial 1.2 – Revisiting an Attachment

Although we successfully added an attachment of Donald’s driver’s license to his record, there is one detail that we neglected to remember. There are date fields that allow a user to indicate when the documents need to be renewed, but what about the attachment itself? We will soon find out as we learn about note details within a record.

1. Open **Donald Stern’s** employee record.
2. On the **Personal** screen, select the **Category Notes** button to display the **Notes for Personal Category** screen.
3. Select the note that we created in the previous tutorial and select the **Details** button.

The Search Tag 1 and Search Tag 2 fields have been populated with Donald’s employee ID and full name backwards, respectively. The rest of the fields have been left blank and are used to set dates for when an attachment expires and needs to be deleted, or in our case, when the attachment needs to be revisited and updated.

4. In the **Revisit Date** field, use the date popup to select a date that is exactly one week from today’s date.

If Donald’s image needs to be revisited and updated in a week, we need to get on top of alerting both Donald and the HR department as soon as possible.

5. Close all screens, save all your changes and return to the Organizer desktop.
6. On the **Tools** menu, select **Alert Triggers**.
7. On the **File** menu, select **New Alert Trigger** or on the Tool Bar, click the **New Alert Trigger** button to start a new alert trigger.
8. Change the name of the trigger to **Update Driver’s License Image**.
9. Set the **Category** to **Personal**.
10. Leave the **Active** check box selected.
11. Click the **Conditions** tab.
12. In the **If Today’s Date Is** field, set the amount field to **7**. Set the period type to **Days**. Select the **Before** operator. Now, in the fourth field, select the **Note Revisit Date** field. The condition should now read as follows:

**If Today’s Date is 7 Days
 Before
 Note Revisit Date**

Setting the alert a week before the revisit date will give both parties enough time to get things ready.

13. Select the **Active Records Only** check box to limit this alert to active records only.
14. On the **Actions** tab, click the popup button to display a list of the available actions.
15. Add a **Send Message** action and go into the details for that action.

16. In the **User ID** field, enter **DEMO**.
17. In the **Message Text** field, enter the following:

This employee must provide an updated drivers license for carpooling privileges to continue. A scanned image must be received by the end of the week.
18. Close the **Send Message** screen, saving your changes.
19. Select the **Send Email** action and open the details.
20. In the **To Address Type** field, select **Field Substitution**.
21. In the **To** field, select **Email**, which is the email address field for the employee.
22. Click the **Message** tab.
23. In the **From Address Type** field, select **Position**.
24. In the **From** field, click the popup button and select **1043 - Human Resources Manager**.
25. In the **Subject** field, enter **Drivers License Update**.
26. In the **Text** field, enter the following text:

Records indicate that your driver's license is currently out of date. Please schedule an appointment with the Human Resources before the end of the week. Failure to do so will remove your driving privileges within the carpool.
27. Close the **Alert Triggers** screen, saving your changes.
28. Switch to the **Safety Management** module and then switch back to the **Personnel Management** module.

Our trigger will be executed and you will see the email being sent out to Donald as well as a message appearing in your inbox.
29. Open the **Inbox**, open the **Message** item, read it and then close the message and your **Inbox**.
30. Continue with the next tutorial.

Tutorial 1.3 – Defining Details for Archived Documents

In previous training, you learned how to archive a document for future reference by using the output to archive feature. Within this lesson we will take a look at the additional fields that we can use and details that can be defined once a document has been archived.

1. Open **Julie Carrington's** record and view her **Status** screen.
2. Change her **Hire Date** to today's date and save your change.
3. Repeat the same steps in **Donald Stern** and **Gregory Wilson's** employee records, saving your changes and then returning to the Organizer desktop.

Now that we have some data to work with, let's create a report that we can archive.

4. Create a new Adhoc Report named New Hires for the Current Month.
5. Click the **Report Definition** tab and select the following three fields in the order shown:

Full Name
Hire Date
Source

6. Click the **Query** tab and enter the following query equation, as described below:

Hire Date Between START-OF-MONTH and END-OF-MONTH

We should see the employees that were hired between the start and end of the current month.

7. Run the report.
8. On the Tool Bar, click the **Output to Archive** button.

The Output to Archive screen is displayed.

9. In the **Document Name** field, add today's month and year to the end of the field.
10. Change the **Category** to **Status**
11. In the **Description** field, enter the following text:

This report includes the new hire sources for: *name of current month and year.*

As you can see, the Search and Retention frame contains fields that we have seen before in Category Notes. Since our archived document was not created in an open record, the search tag fields are blank. It is up to us to define some meaningful search criteria.

12. In the **Search Tag 1** field, enter the name of the **current month and year**.
13. In the **Search Tag 2** field, enter: **Recruiting**
14. In the **Expiration Date** field, use the date popup to select the **first of next month**.
15. Close the **Output to Archive** screen, saving your changes.

16. Close the **Document Viewer** and the **Adhoc Reports** screen.
17. From the **Explorer**, run the **Absences by Account** report.
18. On the Tool Bar, click the **Output to Archive** button.
19. In the **Search Tag 1** field, enter the name of the **current month** and **year**.
20. In the **Search Tag 2** field, enter: **Attendance**.
21. In the **Expiration Date** field, use the date popup to select **yesterday's date**.
22. Close the **Output to Archive** screen, saving your changes.
23. Close the **Document Viewer** and the **Adhoc Reports** screen.
24. Run the **Absences by Department** report.
25. On the Tool Bar, click the **Output to Archive** button.
26. In the **Search Tag 1** field, enter the name of the **current month** and **year**.
27. In the **Search Tag 2** field, enter: **Attendance**.
28. In the **Expiration Date** field, use the date popup to select **yesterday's date**.
29. Close all screens, saving your changes and return to the **Organizer** desktop.
30. Continue with the next tutorial.

Notes

Lesson 2

Document Management 2

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This lesson covers how to create a document from scratch within Document Management and how to use search tag criteria within the lookup feature. It concludes by showing how to create alert triggers to assist with document maintenance.

Tutorials

Creating a Document from Scratch: shows how to create and define specifications for a document within the Document Management module.

Document Lookup Using Search Tags: demonstrates how to utilize pre defined search tags when using the lookup feature in Document Management.

Managing Documents with Triggers: shows how to create a trigger to alert a user once documents have expired

Tutorial 2.1 – Creating a Document from Scratch

The Document Module provides you with an enhanced ability to track and define documents that have been attached via Archived Documents or Category Notes. In addition, documents may be created in this module independent from the archive document or notes features. This is especially helpful when it comes to managing documents such as union handbooks, vendor or client agreements, or as we will see in our upcoming tutorial, your annual maintenance agreement.

1. Switch to the **Document Management** module.
2. On the **Shortcut Bar**, click the **New Document** button to create a new document.

The Create Document screen is displayed with the Document Source field set to Scratch. We will leave this field as is.

The Module Name field has been defaulted to Document Management. Since this document is originating in the Document Management module, we will leave this field alone as well.

3. Click **Create**.

Let's take a look at the ID and Name frame first.

The Document ID is automatically assigned and the Document Type and Module Name have been defaulted to Document and Document Management respectively.

4. In the **Document Name** field, assign our document the name **Annual Maintenance Agreement**.

The next few fields will look familiar to you. Just as we did when we created a note and archived documents, we are able to define search tags for this new document.

5. In the **Search Tag 1** field, enter the following text: **Technical Difference**
6. In the **Search Tag 2** field, enter the following text: **People-Trak**
7. In the **Search Tag 3** field, enter the following text: **Contract**
8. In the **Search Tag 4** field, enter the following text: **Maintenance**
9. In the **Document Category** field, use the popup to assign the document to the **Document** category.

The Document Creator has been assigned to the DEMO user and the Document Date to the current date.

10. In the **Document Text** field, enter the following description:

Attached is the Annual Maintenance agreement from Technical Difference, Inc for our People-Trak HR software.

We have gone ahead and saved you extra work by scanning a maintenance agreement and converting it to a PDF file. With those details squared away, we can continue by attaching the file to our document.

11. Select the **Attach** button.

The Select File screen is displayed.

12. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the **ANNUAL MAINTENANCE AGREEMENT.PDF** file.

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

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

13. Select the **Show** button to take a look at our attachment.

14. Close the attachment and return to the **Document** screen.

Let's take a look at the history we have created for this new document.

15. Select the **History** button.

The History screen is displayed with our recently performed "Attached" and "Opened" actions.

16. Close the **History** screen.

Now that our document has been attached, let's assign it an expiration date.

17. Select the **Details** button.

For our maintenance agreement, let's say that we want to set a document expiration date 2 months before maintenance actually expired. With the date around 33 months in the future, we can start counting on our fingers and toes to figure out when that would be. Or we could let People-Trak do the calculation for us.

18. In the **Retention Months** field, enter **33**.

The Expiration Date field is automatically updated to reflect the date exactly 33 months from today's date. If we wanted to set an alert trigger to remind us in the future, we would simply use the Expiration Date field. It's as easy as that!

19. Close the **Details** screen saving your changes.

20. Close the **Annual Maintenance Agreement** document, saving your changes.

21. Continue with the next tutorial.

Tutorial 2.2 – Document Lookup Using Search Tags

Within the Document Management module, you have the ability to search across modules using one of the appropriate search tag fields. Remember the search tags we defined in the previous lessons? We are going to see those tags in action within the lookup feature.

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

Note that the order of the lookup fields on the Basic tab is Document ID, Document Name, Search Tag 1, and Search Tag 2. We don't yet know the document names or ID's for all of our stored documents, so let's change our lookup fields to each of the search tags.

2. Click **Cancel** to close the **Lookup Document** screen.
3. On the **Setup** menu, select **Module Setup**.
4. Click the button adjacent to **Lookup Field 1** to display a list of the fields. Select the **Search Tag 1** field.
5. Change the second field to the **Search Tag 2**.
6. Change the third field to the **Search Tag 3**.
7. Change the fourth field to the **Search Tag 4**.
8. Close the **Module Setup** screen, saving your changes.
9. Use the **Open Document** feature to start the **Lookup** process.

Now our lookup for Document Management is based solely on our search tag criteria.

We want to find a few of our documents that we recently created. To start, let's narrow down the search by the date that we defined for the Search Tag 1 field.

10. In the **Search Tag 1** field, enter the name of the current month and year.
11. Click **Search**.

Since they were all assigned the same Search Tag 1 field, all three of our archived documents are returned to the search results.

But say we just wanted to see the documents for which we set the Search Tag 2 field to Attendance.

12. Click **Clear** to clear the search results and fields.
13. In the **Search Tag 2** field, enter **Attendance**.
14. Click **Search**.

This time, the lookup results return the two documents we were looking for.

15. Select **OK** to open the record group.

The Document screen is displayed for our first document. Let's take a quick tour of all the information that has been stored for this archived document.

As you can see, the Document Name has been populated with the name we gave our archive document. The Document Type is Archived Document and the Module Name has been set to Personnel Management, the module we created this document in. All these fields are display only and cannot be changed.

Note that the Search Tag 1 and Search Tag 2 fields are set to the criteria we set. We can change these tags or define additional ones, but we will leave our document as is for now.

Within the Document frame, we are able to change the Document Category and Document Text but again, let's keep things the way they are.

16. On the **Toolbar**, select the **Next Record** button to move to our next archived document.

Once again, the fields on this screen have been stored according to the type of document and what we defined when we output to archive. Why don't we go ahead and find the note we created earlier and see how it has been stored differently within Document Management?

17. On the **Toolbar** select **Open Document** to start the lookup.

18. In the **Search Tag 3** field, enter **Contract**.

Because it was the only document assigned to that search tag, the note document for Donald Stern is opened and the main Document screen is displayed.

Since this document originated from a note that we created, all fields are display only, except for the Document Name, Document Text and search tags 3 and 4. We won't be adding any search tags, but there are a few fields that we will change.

The Document Name has been defaulted to New Document, which does not give us any idea as to what this document is for. Let's assign it a new name.

19. In the **Document Name** field, enter: **Drivers License- Donald Stern**

20. In the **Document Text** field, replace the existing text with the following:

A scanned image of Donald's driver's license has been attached.

21. Close the **Document Management** module, saving your changes.

With document lookup knowledge under our belts, let's return our lookup fields to their original settings.

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

23. Click the button adjacent to **Lookup Field 1** to display a list of the fields. Select the **Document ID** field.

24. Change the second field to the **Description**.

25. Change the third field to the **Search Tag 1**.

26. Change the fourth field to the **Search Tag 2**.

27. Close the **Module Setup** screen, saving your changes.
28. Continue with the next tutorial.

Tutorial 2.3 – Managing Documents with Triggers

In previous lessons, we set expiration dates for many of the documents that we created. Typically, we could run a report every so often to inform us as to which documents are out of date. However, by using the Expiration Date field within an alert trigger, we can be alerted once documents are out of date and need to be deleted or updated.

1. On the **Tools** menu, select **Alert Triggers**.
2. On the **File** menu, select **New Alert Trigger** or on the Tool Bar, click the **New Alert Trigger** button to start a new alert trigger.
3. Change the name of the trigger to **Expired Documents Alert**.
4. Leave the **Active** check box selected.
5. Click the **Conditions** tab.

Just in case the documents are needed on their expiration date, we are going to set the alert to go off the day after they expire.

6. In the **If Today's Date Is** field, set the amount field to **1**. Set the period type to **Days**. Select the **After** operator. Now, in the fourth field, select the **Document Expiration Date** field. The condition should now read as follows:

**If Today's Date is 1 Days
 After
 Document Expiration Date**

7. Select the **Active Records Only** check box to limit this alert to active records only.
8. On the **Actions** tab, click the popup button to display a list of the available actions.
9. Add a **Send Message** action and go into the details for that action.
10. In the **User ID** field, enter **DEMO**.
11. In the **Message Text** field, enter the following:

This document has expired and is no longer valid. Please make sure that this document is deleted from Document Management today.

12. Close the **Send Message** screen, saving your changes.
13. Close the **Alert Triggers** screen, saving your changes.
14. Switch to the **Generic** module and then switch back to the **Document Management** module.

Our trigger will be executed and you will see a message appearing in your inbox for each expired document. In our case, you should see two.

15. Open the **Inbox**, open the **Message** items, read them, and close the messages and your **Inbox**.

Let's take those messages seriously and delete our expired documents!

16. Use the **Open Document** shortcut to start the **Lookup** process.

17. In the **Search Tag 2** field, enter **Attendance**.

The two expired documents are returned to the results.

18. Select **OK** to open the record group.

19. For the first expired document, select **Delete Document** from the **File** menu to delete it.

Repeat the same steps to delete the second expired document.

20. Close all screens, saving your changes and return to the **Organizer** desktop.

21. Exit **People-Trak**.

22. This concludes this tutorial and lesson

Notes