Workflows

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Workbook

Workflows

A workflow is most easily defined as a group of related screens. When you open any personnel record, you are viewing the standard workflow, which is the group of screens that all share the purpose of organizing your personnel. However, the screens in workflows do not need to have any relation or common purpose. Any screen may be added to a workflow, be it custom or standard. Any electronic form can also be added to a workflow.

Suppose you wanted to view your employee's Compensation screen as well as a custom screen displaying the employee's previous job training. These screens are obviously not in the same context, but if your job requires viewing both of these screens, a workflow can be made that accommodates them.

Custom workflows are most useful when you want to group together several custom screens. The custom screens can be grouped together using the Workflows option on the Tools menu. Once you have created a workflow, you can then view it under the Workflows menu. You can even replace the standard workflow with a custom workflow, if a custom workflow better suits your needs.

The Workflows screen provides a list of the current workflows on the left and a data entry area to the right. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of workflows. The Workflows process uses a three-tab screen.

Workflow Setup Tab

The Workflow Setup tab allows you to name the worflow, assign it to a categor, and specify important workflow details. Details for the workflow and their descritions are defined below.

Default Action

The default action when opening this workflow, which can be either open an existing record or create a new record.

Show on Menu

A check box that allows you to specify whether or not the current workflow should be shown on the Workflows menu. Select this check box to show the workflow on the Workflows menu. Clear this check box to not show the workflow on the Workflows menu. This field is defaulted as selected.

Allow New Record

A check box that allows you to specify whether or not users can add a new record while in this workflow. Usually it is wise to let users add new records in any workflow. However, you may want to regulate the addition of new records, especially in sensitive workflows that deal with compensation and salaries. Select this check box to allow users to add a new record or clear the check box to not allow users to add a new record.

Suppress Toolbar

A check box that allows you to specify whether or not users can access the toolbar while in this workflow. This will hide the tool bar. This can be used for workflows with any type of screen, but is normally used for "text-only". If the user creates a multi-screen workflow with

suppressed toolbars, the user will need to add the capability to move between the screens. Likewise for moving between records.

Save Transaction History

A check box that allows you to specify whether or not the transaction history for this workflow 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 workflow, this history is available for viewing in a record by using the Show Transaction History button on the Navigation Bar or by using the Audit/Transaction History process on the Administration menu.

Link History to Notes

A check box that 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 Show Transaction History button when in that record.

Save Document to Notes

A check box that allows you to specify whether or not to save the document (specified in the Document to Attach field) to notes. Select the check box to save the document to notes. Clear the check box to not save the document to notes. If you select the check box, a note with a Note Text of "Workflow: workflow name History Document" is added to the record when it is saved, and this note has the specified document as an attachment. This allows you to have a snapshot of the data at the time the record is saved.

Document to Attach

The document to attach to notes when the Save Document to Notes check box is selected. This field is supported by the Select Document popup.

Record Group

The group type to use when the document is generated. Current Group will show the information for the current record group; whereas Current Record will show only the current record's information on the document. A record type of Use Query allows you to use the query from the document to determine the records to use for the document. Choosing the current record or current group ignores the document's query.

Screens Tab

The Screens tab allows you to select which screens you want on the selected workflow. Any screen in the current module may be added to a workflow, including custom screens.

Change the Default Workflow

The default workflow is the workflow that is displayed when you use the File menu options or Shortcut Bar icons. People-Trak is shipped with workflows named "Standard-" followed by the type of record being updated by the workflow. For example, the standard workflow for the Personnel Management is "Standard-Employee".

You can change the default workflow per module for a user in User Setup. Any valid workflow can be chosen.

Accessing Workflows

Workflows can be accessed in several different ways as described below. After the workflow has been accessed, it is opened using the default action specified in the Default Action field of the workflow and the records can be processed accordingly.

As Default Workflow

If the workflow is the default workflow for a user, the user need only use the New or Open *Record* option on the Shortcut Bar or the File menu to access that default workflow.

On Workflows Menu

If the workflow has the Show on Menu check box selected, it will appear on the Workflows menu, and the user can then select it from that menu.

In Organizer Categories Pane

The workflow is included within its assigned category in the Organizer desktop's Categories pane. The user can then select the workflow from the list of workflows in the Workflows subcategory of that main category.

In Organizer Tasks Pane

If the user has the workflow in the list of their Desktop Tasks in User Setup, the user can select the task in the Tasks pane of the Organizer desktop.

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Lesson 1
Workflows 1: Basics

Contents

This lesson covers how to create and access a workflow as well as how to allow new records to be added using the workflow.

Tutorials

Basic Setup: shows how to set up a new workflow and then access it from the Organizer desktop.

Adding a Workflow to Desktop Tasks: demonstrates how to add your workflow to the desktops tasks that are available on all desktops.

Allowing New Records: shows how to allow a user to add new records from within your workflow.

Tutorial 1.1 – Basic Setup

Workflows are a collection of one or more screens. In prior lessons, we have used the Workflows feature to demonstrate how custom screens can be displayed. In this tutorial, we will look at some basic setup options.

1. On the **Tools** menu, select **Workflows**.

   The Workflows screen is displayed. The Workflows screen is a tabbed screen that provides a list of the current workflows on the left and a data entry area on the right. The Workflow Setup tab is for specifying basic settings and the Screens tab is used to specify the screens to be used in the workflow. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of workflows. Let's get started and create a workflow.

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

   A default name will be assigned. The name is NEW-#, where "#" is the next available, unused number.

3. Change this default name to **My Workflow**.

   Do not worry about wasting keystrokes. We will not delete this workflow in two seconds just to make a point. Now let's start learning some good stuff.

   As with custom screens, the Category field is used for security. With workflows, it also determines where the workflow is displayed in the Categories pane of the desktop. The Category is defaulted to User but can be changed to any of the pre-defined categories.

4. In the **Category** field, select **Personal**.

5. Click the **Screens** tab. In the **Screen Name** field, use the popup button to display a list of screens and select the **Personal** screen.

   We now have the basis for a workflow. We have a name and we have a screen. Let's do something with it.

6. Close the **Workflow** screen, saving your changes.

   Now, let's find your workflow.

7. Check the **Workflows** menu.

   Is it there? Yes, because new workflows default to having the Show on Menu check box selected. If you don't want the workflow to show up on the Workflows menu just clear that check box.

8. Go ahead and select your workflow.

   The Lookup Employee screen is displayed. This is because the default action for the workflow is to open a record.

9. Select any records so you can see your workflow in action.

Once your workflow is opened with those records, note that the Screen dropdown shows the Personal screen, but it is grayed out. This is because you only have one screen, Personal, assigned to this workflow. You can't use the dropdown to switch to other screens because there aren't any.

10. Now close your workflow.

    Let's take a look at another default action for your workflow.

11. On the **Tools** menu, select **Workflows**. Select your **My Workflow** workflow.

12. In the **Default Action** field, select **New**. Close your workflow, saving your change.

13. Find the **Personal** category in the **Categories** pane. Open the category and then open the sub-category for **Workflows**. Your workflow should be there because you assigned it to the Personal category. Go ahead and select your workflow by clicking on it.

    The Create Employee screen is displayed because you set the Default Action for your workflow to New.

14. Click **Create** to create a new employee record from scratch.

    Your workflow is displayed, and a new record was created.

15. On the **File** menu, select **Delete Employee** and delete the record just created.

    This deletes the record and closes the workflow since that was the only record open.

    Now, let's set your workflow back to the Open action.

16. On the **Tools** menu, select **Workflows**. Select your **My Workflow** workflow.

17. In the **Default Action** field, select **Open**. Close your workflow, saving your change.

    As we have seen, you can select workflows from the menu or from any organizer category you specify. However, you do not have to do both, and in fact, you do not have to do either. You may be wondering why you would create a workflow that does not show up anywhere. There is actually a very important place that we can put this workflow. Let's illustrate this point in the next tutorial.

18. Continue with the next tutorial.

Tutorial 1.2 – Adding a Workflow to Desktop Tasks

In the last tutorial, you saw how your workflow was accessed from the Organizer desktop both from the menu and the Categories pane. Now, let's see how to add your workflow to the tasks available on all desktops.

1. On the **Tools** menu, select **Workflows** and select **My Workflow**. Clear the **Show on Menu** check box. Close the **Workflows** screen, saving your change.

    That option is no longer listed on the Workflows menu, but is still listed in the Categories pane. Now let's learn something new.

2. In the **Tasks** pane, open the **My Workflows** category.

    There is a list of workflows there, but your workflow is not one of them. Let's add it.

3. On the **Setup** menu, select **User Setup**. Do not change the current user, which would be you, DEMO. Click the **Preferences** tab.

4. Select the **Define Tasks** button.

    We want to add our new workflow to the group of tasks already in the My Workflows category, so we need to add that task in that location.

5. Scroll down and click on the first task in the **My Workflows** category. Insert a row at that location. In the **Group** column, use the popup to select the **My Workflows** group

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

7. In the **Task Type** column, use the popup to select the **Edit** task type.

8. In the **Task Name** column, use the popup to select your **My Workflow** workflow.

9. Close the **Desktop Tasks** screen saving your changes.

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

11. In the **Tasks** pane, open the **My Workflows** group.

    Note that the list of tasks has been updated to include your workflow. You may recall the great feeling you had when you selected your workflow from the Workflows menu and from the Categories pane. You can now have that same feeling again by selecting your workflow from your list of favorites.

12. Click on your workflow to open it, open any record, enjoy the accomplishment and then close your workflow.

    You have now learned that the workflows you create, such as the simple workflow just created and the complex workflows we will create soon, can be selected from the Workflows menu, from a specified category in the Organizer desktop, or from the list of tasks available on the Tasks pane. So many choices!

13. Continue with the next tutorial.

Tutorial 1.3 – Allowing New Records

First, let's take care of some housekeeping chores.

1. Return to your **Organizer** desktop.

2. On the **Tools** menu, select **Workflows** and then select your **My Workflow** workflow. Select the **Show on Menu** check box so that we can demonstrate some new features.

   Now, we'll learn about the Allow New Record feature.

   There are times when you wish to allow a user to add new records from within a workflow and there are times when you do not. Let's demonstrate.

   The Allow New Record is defaulted to selected when a new workflow is created, so it should already be selected.

3. Close the **Workflows** screen, saving your changes. On the **Workflows** menu, select your workflow and open any records. Open the **File** menu and see that the **New Employee** option is present. Check the Tool Bar and the **New Employee** button is present. Close your workflow.

4. Select your workflow for modification and clear the **Allow New Record** check box. Close the **Workflows** screen, saving your changes. On the **Workflows** menu, select your workflow and open any records. This time, the **New Employee** menu option and Tool Bar button are not present.

5. Close the record group.

6. Select your workflow for modification.

7. Select the **Allow New Record** check box.

   We demonstrated this feature with the Default Action set to Open. If you have the Default Action set to New, it is obvious that new is allowed in the workflow at any time.

8. Verify that the **Save Transaction History** check box is not selected.

   We are learning about this next.

9. Close the **Workflows** screen, saving your changes.

10. This concludes this tutorial and lesson.

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Lesson 2
Workflows 2: Advanced Features

Contents

This lesson covers some advanced features when working with workflows.

Tutorials

Saving Transaction History for a Workflow: shows you how to save transaction history for a workflow.

Multi-Screen Workflows: demonstrates how to create multi-screen and complex workflows.

Changing the Default Workflow: demonstrates how to change the default workflow for a module.

Tutorial 2.1 – Saving Transaction History for a Workflow

When creating workflows, there are times when you would like to audit all of the fields without touching other audit settings. You just want fields changed on this workflow to be audited. For example, you may create a custom screen for salary changes to be submitted by managers. You may not normally be auditing the salary fields because these are changes you make. However, you do wish to audit these fields if recorded on this particular custom screen in a particular workflow. You can do exactly this and more by saving the transaction history for a workflow. You learned about this when using a standard workflow in the Administration training, but we will now demonstrate how all this works when there are also custom workflows.

1. On the **Setup** menu, select **Audit Setup**. Select the **Personal** category. If there are any check boxes selected, click the **Toggle all fields on this screen** button to toggle all of the fields so they will not be audited. This means that no fields will be checked.

2. Select the **City** check box. We want only the **City** field to be audited. Close the **Audit Setup** screen, saving your changes.

3. On the **Workflows** menu, select your **My Workflow** workflow. Open **Donald Stern's** record. In the **Address** frame, change all of the address fields. Use any values you desire, but change all of the fields in that frame.

4. When you have updated the address fields, click the **Save** button to save all of these changes without leaving **Donald's** record.

   The color of the fields should change to reflect the save.

5. On the **Audit** menu, select the **Audit History** menu option.

   Note that the change to Donald's City field is reflected in the list, but that the other changes are not. This is because only the City field was selected for auditing.

6. Close the **Field Audit History** screen.

7. On the **Audit** menu, select the **Transaction History** menu option.

   There is no transaction history for Donald because we aren't yet saving transaction history for any workflows, including yours. Let's save transaction history for your workflow now.

8. Close **Donald's** record.

9. On the **Tools** menu, select **Workflows** and then select your **My Workflow** workflow. Select the **Save Transaction History** check box.

   When you save transaction history for a workflow, you also have the option of adding a link to that transaction history in the notes for the record being updated. We'll demonstrate that as well.

10. Select the **Link History to Notes** check box.

    Below that check box is the Save Document to Notes check box. You can select that at any time, you do not have to be saving transaction history. Since we are going to be taking a look at notes in a bit anyway, let's also demonstrate how this works.

11. Select the **Save Document to Notes** check box.

    When this check box is selected, you must select a document in the Document to Attach field. This document will typically contain data that you want to see a snapshot of at the point in time changes to the record are saved.

12. In the **Document to Attach** field, use the popup and select any document.

13. Close the **Workflows** screen, saving your changes.

14. On the **Workflows** menu, select your workflow and then open **Donald Stern's** record. Change all of **Donald's** address fields and then save the changes without leaving **Donald's** record.

15. On the **Audit** menu, select the **Audit History** menu option.

    This time you will find that all of the fields have been audited, and the most recent change is listed at the top.

    The Save Transaction History setting has audited all fields. Saving transaction history saved audit information for all fields on that workflow, not just those set to auditing in Audit Setup. Saving transaction history also captures key transaction history as well. Let's take a look.

16. Close the **Field Audit History** screen.

17. On the **Audit** menu, select the **Transaction History** menu option.

    The Transaction History screen is displayed, and you can now see My Workflow listed in the workflow listing. Since your workflow is the only one, it is automatically selected. The transaction history for the changes we just made using your workflow are displayed in the Changes grid.

18. Close the **Transaction History** screen.

19. On the **Category Bar**, click the **Category Notes** button.

    The Notes for Personal category are displayed, and you should see a Transaction History Link entry for today's date with an attachment. This note was created because you selected the Link History to Notes check box. It was created in the Personal category because that is the category you assigned to your workflow.

20. Click anywhere in that **Transaction History Link** row, and then click the **Show** button.

    The Transaction History screen is displayed with the changes you just made.

21. Close the **Transaction History** screen.

    You should also see a History Document note for your workflow.

22. Click anywhere in that **History Document** row, and then click the **Show** button.

    The document you selected is displayed. When you saved your changes, this document was generated to a pdf file and stored with this note. You now have the snapshot of data at that point in time.

23. Close the **Document Viewer**.

24. Close the **Notes for Personal Category** screen.

25. Make another change to **Donald's** record and click the **Save** button to save that change.

26. Select **Transaction History** on the **Audit** menu.

    Now you will see two transaction entries for your workflow, with the most recent transaction on top and highlighted. You will also see the change you just made in the Changes grid. Every time you save, there is a new transaction created.

27. Close the **Transaction History** screen.

    As we have seen the Save Transaction History setting has overridden the standard audit settings for the address fields, but only on this workflow. Let's illustrate this.

28. Close **Donald's** record and then open it again by clicking the **Open Employee** shortcut to use the **Standard - Employee** workflow, not your workflow. Change a few address fields, save the changes and then check the audit history.

    The audit history will only show a change for the City field. That is because the audit override set on your workflow only applies to changes made within that workflow. We did not make this change on the Standard - Employee workflow and thus the settings made within the Audit Setup process apply, which is to audit the City field only.

29. Close the **Field Audit History** screen and close **Donald's** record.

30. Continue with the next tutorial.

Tutorial 2.2 – Multi-Screen Workflows

Thus far, we have been demonstrating workflow features using very simple workflows. You are not limited to simple workflows. You can create workflows with many screens and a few twists.

1. On the **Tools** menu, select **Workflows** and then select your **My Workflow** workflow. Click the **Screens** tab. You already have the **Personal (EMP-1)** screen on your workflow, so add **EMP-2**, **EMP-3**, and up through **EMP-6** using the **Screen Name** popup sorted by **Screen Code**. Once you have these screens added, select **EMP-8, EMP-9**, and **EMP-12.** You should have a total of 9 screens on your workflow when you are done.

2. Close the **Workflows** screen, saving your changes.

3. On the **Workflows** menu, select your workflow. Open **Donald Stern's** record and move through the screens.

    If this workflow looks a lot like the Standard - Employee workflow, it should. You recreated this workflow when you selected each of the main screens.

4. Close your workflow.

    Now let's modify your workflow again. This time, let's assume that you are a Training Coordinator and you only wish to see screens pertinent to the training process.

5. Modify your workflow again and change the list of screens to include only **Training/Competency** (**EMP-8)**. Close the **Workflows** screen, saving your changes.

6. Now, acting as the Training Coordinator, select your new workflow, open any records and admire the fact that you have a workflow designed just for you.

    Life is good, but it can be better. You may not wish to have to remember to go to the Workflows menu to get your workflow. Why can't your workflow be the one that always shows up and not the Standard - Employee workflow? Good news! It can, but we'll learn that in the next tutorial.

7. Close the workflow and read on.

    Thus far, we have only selected main screens on your workflow. These are the screens that are not selected with buttons from other screens. However, you are not limited to doing so. If you see a screen name available in the list, even one that is normally used as a sub screen or one that you have made yourself, you can use it.

8. Select your workflow for modification. On the **Screens** tab, add the following screens: **EMP-8A**, **EMP-8B**, **EMP-8C**, and **EMP-8D**.

    These are the sub screens normally displayed on the larger Training screen. Let's see how it looks.

9. Close the **Workflows** screen, saving your changes. On the **Workflows** menu, select your workflow. Open any record and then move through the screens.

    The screens that are used as sub screens in the Standard - Employee workflow work

perfectly as non-sub screens in your workflow. You can mix and match these screens in any combination you desire including using the same screen twice, as you will see.

10. Select the **Training/Competency** screen.

    This screen should have a stack of buttons on the right side. One of these buttons has the caption Certifications. The Certifications screen is used to record certifications an employee has earned upon successful completion of a training course. In your workflow, the Certifications screen is used both as a sub screen called from the Training screen and as a main screen later in the set.

11. Click the **Certifications** button to display the **Certifications** sub screen. In the **Certification Code** field, use the popup button to select a certification. After your selection, the **Certification Name** and the **State** should be returned. Close the sub screen, saving your changes.

12. Now move through the screens until you reach the **Certifications** screen used as a main screen.

    Note that the exact same change is displayed there. This screen reflects exactly the same work that was keyed on the sub screen earlier.

13. Add another certification on this "main" screen and then return to the sub screen used earlier.

    The sub screen will reflect both changes because a screen is a screen is a screen.

14. Close the workflow.

15. Continue with the next tutorial.

Tutorial 2.3 – Changing the Default Workflow

In any module, users can have their own "default" workflow. The default workflow is not the same as the "standard" workflow. The Standard - Employee workflow is the workflow that People-Trak provides when the product is shipped. The default workflow is the workflow that will be used when you choose the New *Record* or Open *Record* option on the File menu or on the Shortcut Bar. The default workflow is the one that always displays unless you specifically select a different workflow from the Workflows menu or the Organizer. Let's change your default workflow now.

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

   Note that the default workflow listed in the grid for the Personnel Management module is the Standard - Employee workflow.

2. In the **Workflow Name** column for the **Personnel Management** module, click the popup button to display a list of the available workflows. Select your workflow, which is now composed of training screens only. Close the **User Setup** screen, saving your changes.

   Let's see how it worked.

3. Click the **Open Employee** shortcut and select **Donald Stern**.

   Rather than the boring old Standard - Employee workflow, you should now see your workflow.

4. Close your workflow and use the **File** menu to open an employee.

   Again, you should see your workflow. It's that simple: your workflow has taken over the world.

5. Close your workflow and keep learning.

6. Return to the **User Setup** process and change your default workflow back to the **Standard - Employee** workflow.

   This will help us in future tutorials.

7. This concludes this tutorial and lesson.

Notes

Lesson 3
Workflows 3: More Advanced Features

Contents

This lesson covers how to create a custom screen that uses a form as a background image, which allows you to easily create electronic input forms. It concludes with suppressing the default toolbar in a workflow and creating a custom one to replace it.

Tutorials

Select a Form and Position Fields: shows how to select a form and then position fields on that form.

Using the Form in a Workflow: demonstrates how to add the form to a workflow.

Suppressing a Workflow Toolbar: shows how to suppress a toolbar from within your workflow.

Create the Button Triggers: demonstrates how to create the button triggers required for the custom screen.

Build and Use the Custom Toolbar: shows how to build and use the custom toolbar you created.

Tutorial 3.1 – Select a Form and Position Fields

You have already created a custom screen with a background image. Now you will create a custom screen with a PDF form as its background. This gives you the ability to create a form that can then be used for data entry.

The first steps in creating this type of form are to select the PDF form to be used and pick the fields that are to be input using the form. This should look very familiar to you after having learned about form templates in past training.

1. On the **Tools** menu, select **Custom Screens**.

   The Custom Screens screen is displayed.

2. On the **File** menu, select **New Custom Screen** or on the Tool Bar, click the **New Custom Screen** button to start a new custom screen.

   A default name will be assigned. The name is NEW-#, where "#" is the next available, unused number.

3. Change the name of the custom screen to **Employee Information Form**.

4. In the **Category** field, select **Personal**.

   Now, let's select the PDF form we want to use.

5. Click the **Select Form/Image** button to display the **Select File** screen that works just like Windows Explorer.

6. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **APPLICANT INFORMATION 1.PDF**.

7. Click the **Preview** button and take a look at the form so far, noting the format and the fields that need to be filled in.

8. Close preview mode for now, but we'll return when we have some objects to manipulate.

   At this point, you would normally start selecting the fields you need for your form by looking at the form. We will save you some time and provide a list of the fields needed.

9. Select the following **Field Names**:

   Last Name
   Middle Name
   First Name
   Address 1
   Address 2
   City
   State
   Zip Code
   Home Phone
   Birth Date

   Now we need to place these fields in their respective positions on the form. We'll start by entering preview mode.

10. Click the **Preview** button.

    The names of the fields you have placed on the form are listed in the Object dropdown. The fields themselves are listed down the left side of the form. We are now ready to begin moving these fields into their respective places on the form. We want to move the field and its caption together. Remember that we do that by right-clicking on the object itself, which also selects the caption.

11. Right-click on the **Last Name** field to activate that field and its caption for movement. Then drag the field into its respective place on the form. Remember, you can use the nudge feature to move or size the field one pixel at a time.

12. Now position the rest of the fields.

13. Close preview mode.

    All we need to do is clear the captions for all our fields.

14. For each of the **Field** objects, clear the **Caption** field.

15. Click the **Preview** button.

    Now the form looks much better.

16. Close preview mode.

    Note: The form we used accommodated all of our People Trak fields without needing to edit the actual form. There may be an instance where a company form may include fields that are formatted differently. For example, many forms have fields such as Gender, Ethnicity, US Citizen and Veteran that have multiple selections or checkboxes. These fields in People-Trak are a single field. Contact your Support Representative if you need assistance customizing a form or converting it to PDF format. Most government forms are now available in PDF form.

17. Continue with the next tutorial

Tutorial 3.2 – Using the Form in a Workflow

Now that you have your form-based custom screen created, let's use it in a workflow.

1. On the **Tools** menu, select **Workflows**. On the Tool Bar, click the **New Workflow** button to create a new workflow. Change the name of the workflow to **Employee Info Form**. Leave the **Show on Menu** check box selected so that this workflow will show up on the **Workflows** menu.

   We need to add your new custom screen to the workflow.

2. Click the **Screens** tab. In the first row of the **Screen Name** column, click the popup button to display a list of the available screens. Select **Employee Information Form**. Close the **Workflows** screen, saving your changes.

3. Open the **Workflows** menu. Your new workflow should be present. Select the workflow and then open all employee records.

   The new custom screen is displayed for the first employee with all of the information placed in the appropriate place on the form. Move through the list of records and note how the information for each employee is shown.

   The form that we created is longer than the space provided for normal data entry screens. Therefore, scroll bars are automatically activated.

4. Use the scroll bar now to scroll the form.

5. Close the records.

   There you have a single-screen workflow using your form. There are times that you might have a multi-page form that you want to use for input. Let's create another simple form.

6. On the **Tools** menu, select **Custom Screens**.

7. Create a new custom screen named **Employee Information Form 2**.

8. In the **Category** field, select **Personal**.

   Let's select the PDF using the same method as before.

9. Click the **Select Form/Image** button to display the **Select File** screen.

10. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **APPLICANT INFORMATION 2.PDF**.

    To save time, we won't be adding any fields to this new screen.

11. Click the **Preview** button.

12. Close preview mode and custom screens, saving your changes.

13. On the **Tools** menu, select **Workflows**. Select the **Employee Info Form** workflow that you created earlier in this tutorial.

14. On the **Screens** tab, insert the **Employee Information Form 2** screen below the **Employee Information Form**.

    Note that the list of screens is actually the two pages of the application form. When you create your own forms, you are not limited to two pages; you can have as many as are needed. Each page, however, must be a separate custom screen.

15. Close the **Workflows** screen.

16. Return to the **Personnel Management** module.

    We have one more thing to learn about using forms in workflows.

    In People-Trak, a screen is a screen is a screen. It does not matter if the screen is based on a form or is just a regular screen. We can actually make a workflow that is composed of both. While this may not be something you wish to do, it can be done.

17. On the **Tools** menu, select **Workflows**. Select the **Employee Info Form** workflow that you created earlier in this tutorial.

    Now, let's add some screens.

18. On the **Screens** tab, insert the **Personal** screen above **Employee Information Form**.

    You should now have a workflow composed of two form based screens and one based on a regular screen. (And interestingly, some of the same fields are present on both the form and the regular screen.)

19. Close the **Workflows** screen, saving your changes. Now select your **Employee Info Form** workflow from the **Workflows** menu. Select **Donald Stern's** record and move through the screens.

    Note that the display switches between regular screens and forms instantly and that the scroll bars are turned on and off as necessary.

20. Select the **Personal** screen. Change **Donald's Last Name** to **Sternz**. Now move to the form where the last name is also displayed.

    Note that the name is displayed as Sternz even though it was not keyed on the form. The regular screen and form screen types are merely a collection of fields that reflect the current state of the fields placed on them. In this case, the Last Name field is Sternz at the moment, and it will be Sternz on any screen in any workflow until changed or deleted.

21. Change **Donald's Last Name** back to **Stern**.

22. Close the record, saving your changes.

23. On the **Tools** menu, select **Workflows**. Select the **Employee Info Form** workflow.

24. On the **Screens** tab, delete the **Personal** screen from the workflow.

25. Close the **Workflows** screen, saving your changes.

26. Continue with the next tutorial.

Tutorial 3.3 – Suppressing a Workflow Toolbar

In past training, we were able to see how changing security settings affected the look and functionality of the toolbar. Additionally, we learned how certain functions were disabled when they were not applicable. For example, the four grid buttons may be disabled because a field is not in a grid. What we have yet to explore is a feature that completely removes a toolbar from a workflow and suppresses the toolbar functions. In this tutorial, we will take a look at how toolbar suppression can affect the use of a workflow.

Let's take another look at our latest workflow.

1. Select your **Employee Info Form** workflow from the **Workflows** menu.

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

    You should be quite familiar with the different functions of the toolbar by now. Remember that each button on the Tool Bar has a graphical icon on it that helps denote what it is, the Navigation Bar contains features for navigating groups of records and the Category Bar contains the Screen dropdown for navigating the various screens.

    With that quick refresher under our belts, let's see what happens when we suppress the toolbar.

3. On the **Tools** menu, select **Workflows**.

4. Select the **Employee Info Form** workflow.

5. Select the **Suppress Toolbar** check box.

6. Close the **Workflows** screen, saving your changes.

7. On the **Workflows** menu, select your workflow and open any record.

    With the toolbar gone, our workflow has turned into a single screen display. We cant navigate to different records or screens, we are unable to undo any editing we may decide to do, and any changes we make cannot be saved.

    However, we can resolve this by creating our own toolbar, complete with our own icons and standard functions. Before we get started, let's restore the toolbar for our workflow.

8. Close the **Employee Info Form** workflow.

9. On the **Tools** menu, select **Workflows**.

10. Select the **Employee Info Form** workflow.

11. Click the **Suppress Toolbar** checkbox so that it is no longer selected.

12. Close the **Workflows** screen, saving your changes.

13. Continue with the next tutorial.

Tutorial 3.4 – Create the Button Triggers

Our custom toolbar is going to use button triggers, so let's create those first.

1. On the **Tools** menu, select **Button Triggers**.

2. On the **File** menu, select **New Button Trigger** or on the Tool Bar, click the **New Button Trigger** button.

3. Enter **New Previous Screen** for the **Trigger Name** and place it in the **Personal** category. Set the **Caption** to **Previous Screen.**

4. Click the **Actions** tab.

5. Add an **Execute Tool** action. In the **Detail** for that action, select **Previous Screen** in the **Tool Name** field.

6. Create another new button trigger, and enter **New Next Screen** for the **Trigger Name** and place it in the **Personal** category. Set the **Caption** to **Next Screen.**

7. Click the **Actions** tab.

8. Add an **Execute Tool** action. In the **Detail** for that action, select **Next Screen** in the **Tool Name** field.

9. Create another new button trigger, and enter **New Previous Record** for the **Trigger Name** and place it in the **Personal** category. Set the **Caption** to **Previous Record.**

10. Click the **Actions** tab.

11. Add an **Execute Tool** action. In the **Detail** for that action, select **Previous Record** in the **Tool Name** field.

12. Create another new button trigger, and enter **New Next Record** for the **Trigger Name** and place it in the **Personal** category. Set the **Caption** to **Next Record.**

13. Click the **Actions** tab.

14. Add an **Execute Tool** action. In the **Detail** for that action, select **Next Record** in the **Tool Name** field.

15. Create another new button trigger, and enter **New Close** for the **Trigger Name** and place it in the **Personal** category. Leave the **Caption** blank because we will use a picture for this button.

16. Click the **Actions** tab.

17. Add an **Execute Tool** action. In the **Detail** for that action, select **Close** in the **Tool Name** field.

18. Create another new button trigger, and enter **New Exit** for the **Trigger Name** and place it in the **Personal** category. Leave the **Caption** blank because we will use a picture for this button.

19. Add an **Execute Tool** action. In the **Detail** for that action, select **Exit** in the **Tool Name** field.

20. Create another new button trigger, and enter **New Save** for the **Trigger Name** and place it in the **Personal** category. Leave the **Caption** blank because we will use a picture for this button.

21. Add an **Execute Tool** action. In the **Detail** for that action, select **Save** in the **Tool Name** field.

22. Create another new button trigger, and enter **New Date Stamp** for the **Trigger Name** and place it in the **Personal** category. Leave the **Caption** blank because we will use a picture for this button.

23. Add an **Execute Tool** action. In the **Detail** for that action, select **Date Stamp** in the **Tool Name** field.

24. Create another new button trigger, and enter **New Undo** for the **Trigger Name** and place it in the **Personal** category. Leave the **Caption** blank because we will use a picture for this button.

25. Add an **Execute Tool** action. In the **Detail** for that action, select **Undo** in the **Tool Name** field.

You can do all sorts of other actions upon saving the changes, but you will take a closer look at those when learning more about triggers in later training.

26. Close the **Button Triggers** screen, saving your changes.

    Ok, the button triggers we need are raring to go, so in the next tutorial we will create our custom screen and use these triggers.

27. Continue with the next tutorial.

Tutorial 3.5 – Build and Use the Custom Toolbar

Using a similar approach to what we learned when we created screen header template, we are going to create our very own toolbar to use on workflows when the default is suppressed.

1. Create a new custom screen. Name the screen **My Toolbar** and put it in the **Personal** category. Leave the **Screen Type** field set to **Standard**.

2. On the first blank row, add a new **Button** object. Use the popup in the **Object Name** column to select the **New Next Record** button trigger we just created. Leave the **Caption** as is.

3. Use the same process to add the following button triggers to the screen:

    New Previous Record

    New Next Screen

    New Previous Screen

4. In the next blank row, add a **Picture** object. In the **Object Name** column, click the popup button and select our **New Close** button trigger. In the **Caption** column, click the popup button. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **CLOSE_GREEN.GIF**.

5. Add another **Picture** object and select the **New Exit** button trigger. In the **Caption** column, select the **EXIT_2.GIF** file.

6. Add another **Picture** object and select the **New Save** button trigger. In the **Caption** column, select the **SAVE.GIF** file.

7. Add another **Picture** object and select the **New Date Stamp** button trigger. In the **Caption** column, select the **DATE_STAMP.JPG** file.

8. Add another **Picture** object and select the **New Undo** button trigger. In the **Caption** column, select the **UNDO.GIF** file.

9. Use preview mode to align the buttons in a single row toward the top of the screen as shown below:

    New Next Record New Previous Record New Next Screen New Previous Screen

    The toolbar icons can be placed in any order that you choose. Make sure they are aligned with the buttons in a single row.

    Note: Some of the icons may require some resizing in order for them to fit next to each other.

10. Close preview mode and save your changes.

    We have a new toolbar! Now, let's use it on some screens.

11. Select the **Employee Information Form** screen.

12. Use the **Insert Screen** option to insert your **My Toolbar** screen to the current custom screen.

13. Use preview mode to confirm that you now have an **Employee Information Form** screen with a new toolbar. Save your new screen.

14. Select the **Employee Information Form 2** screen.

15. Use the **Insert Screen** option to insert your **My Toolbar** screen to the current custom screen.

16. Use preview mode to confirm that you now have an **Employee Information Form 2** screen with a new toolbar. Save your new screen.

17. Close the **Custom Screens** screen.

18. On the **Tools** menu, select **Workflows**. Select the **Employee Info Form** workflow that you created earlier in this tutorial.

19. Select the **Suppress Toolbar** check box.

20. Close the **Workflows** screen, saving your changes.

21. Open **Donald Stern's** record within the **Employee Info Form** workflow.

    Note that our workflow now exhibits the custom toolbar. Let's put it to work!

    The records buttons are used to select the previous and next records in the list. Let's try these and see how they work.

22. Click the **Next Record** button.

    Since we opened Donald's record first, clicking the Next button brought up Gregory Wilson's record.

23. Now click the **Previous Record** button to return to **Donald's** record.

    Besides multiple records, there are multiple screens in this workflow as well. We are currently on the first screen, so let's take a look at the next one.

24. Click the **Next Screen** button.

25. Click on the **Previous Screen** button to return to the first screen.

    With navigation under our belts, let's make some changes using our editing tools.

26. Position to the **Zip Code** field and change Donald's zip code to something new.

27. Select the arrow shaped **Undo** icon to return the **Zip Code** to its former value.

28. Change Donald's **Middle Name** to **Stanley.**

29. In the **Birth Date** field, clear his birth date.

30. Select the **Date Stamp** icon to change Donald's birthday to today's date. (Hint: It looks like a calendar)

    Let's make sure that these changes are saved to Donald's record.

31. Select the **Save** icon at the top of the form.

32. Close **Donald's** record by selecting the x shaped **Close** icon.

    Donald might not appreciate our editing session much as we do. Let's make things right again.

33. Open **Donald's** record within the **Employee Info Form** workflow.

34. Go ahead and change his **Middle Name** back to **Edward** and his **Birth Date** to **7/7/1951**.

35. Select the **Exit** button to close **Donald's** record and save your changes.

36. This concludes this tutorial and lesson