Version 9 Enhancements Overview

Notes

Section 1.1 - Introduction

Login Screen

There is now a "Forgot your password" link that allows you to have your password emailed to you if you forget it. When a new user first logs in, the Change Password screen is displayed and he is required to enter a new password as well as a forgotten password question and answer. If a user later forgets his password, he can click the "Forgot your password" link after entering his user ID, and that then displays his forgotten password question. When that question is answered correctly, the password is emailed to the user. The Change Password screen is also displayed whenever a password change is required because of password expiration or stricter password requirements.

Organizer Desktop

Menu Bar: Provides access to all of the menu-based features in the application. As with prior versions of People-Trak, the menu is only one level deep. There is never a menu within a menu.

Shortcut Bar: Provides a fast (single-click) method to access commonly used options. The options on the Shortcut Bar are fixed and cannot be customized.

Modules Pane: Includes the list of all People-Trak modules. If you do not wish to see specific modules, you can de-activate them from the list using Enterprise Setup.

Categories Pane: Uses a treeview to organize and launch People-Trak options within general categories that have been defined within the specific module. Each category opens up to a sub-category list that includes Activities, Processing, Documents, Tables, and Workflows (as long as there are items available in that sub-category). Each sub-category opens up to a list of the actual activities, tables, etc. available. You can launch any item listed with a click.

The items in the Activities, Processing, and Tables sub-categories are hard coded. The items in the Documents and Workflow sub-categories are user defined. (When you add a document or create a workflow, you specify the category and that's where it goes.)

Tasks Pane: Uses a treeview to organize and launch frequently used People-Trak options. Unlike the Categories Pane, the options listed in the Tasks Pane can be across modules and are entirely user defined. The process of keeping track of the modules is handled by People-Trak. Thus the list can represent things you need to do, independent of what module you need to be connected to. The default task list is maintained in Desktop Setup.

People-Trak News Pane: Includes links to the latest information, video tips, training schedules, etc. provided by People-Trak. This pane will be updated by an automated process so that new material will be reflected on your desktop when it becomes available.

Changes to Menu: The majority of the Tools menu and the entire Administration and Setup menus are only accessible by users with Administrator access for security purposes. The Field Customization process has been moved from the Tools menu to the Administration menu because this process is only available to Administrators.

Status Bar

The Status Bar at the bottom of each desktop now displays the version number, database type, date, user type, and record count (used of total). If any Strategic Options have been implemented, there is a '+' sign after the database type. As before, the first segment is used for messages and the second segment is used for progress tracking as necessary.

Categories

Within People-Trak, Workflows, Activities, Processes, Tables, Screens, Fields and Documents all have a category assigned to them. These categories can be secured within Security Setup –Module and are organized within the Categories pane on the Desktop. This category centric approach also extends into each of the modules as fields, screens, documents, notes, tables, and help are now accessible by category when in an open record.

Section 1.2 – Setup

General Changes

Database: All companies are stored in a single structure and are keyed by company. This change facilitates company-spanning capabilities, the rapid transfer of records between companies, and simplifies implementation. During conversion, your existing companies will be merged appropriately.

Full Auditing Activated: Auditing is now performed for Batch Processing, Database Manager, and Import. These were not part of the auditing process in prior versions.

Internally Trigger Based: In all prior versions of People-Trak, there were hard-coded field exceptions and button triggers. In version 9, these have been converted to triggers and are triggered exactly like user-defined triggers. These "internal" triggers can be turned off (so that you can create a replacement), but they cannot be deleted or modified. Dozens of these internal triggers have been added. They are now accessible via a dropdown in each trigger screen. The trigger code has been designed so that it can be executed irrespective of necessary fields being present on the current screen.

Backup/Restore: The Backup and Restore processes are now available for SQL databases and perform standard SQL backups. This feature should NOT be considered a replacement for full backups performed by your IT staff.

Field Customization/Field Properties

If more than one workflow is available, the Screen/Field Customization process now prompts you to choose the workflow to use for field customization. The process then displays the workflow screens as if the workflow was being run but no data can be entered. The new Field Properties screen is now available by pressing F1 while in any field in Screen/Field Customization.

Edit Attributes Field – Email: Email fields are used to store email addresses, and the contents of the field are validated against the email format. When the cursor is positioned to an Email field, a popup button is displayed adjacent to the field. The popup button is used to activate the Send Email screen for the purpose of sending an email to the email address in the field.

Edit Attributes Field – Hyperlink: No formatting is done on the field, but this setting sets the Popup Type to Hyperlink, which makes this field a hyperlink to whatever website, ftp site or file is in the field.

Table Name Field: Shows the database table where the field is stored.

Popup Type Field: Shows the type of popup associated with the field.

Category Field: Shows the category to which the field has been assigned.

Display Only Field: Use this field to set the Display Only attribute on a field. This feature is applicable when the data for that field is coming from some type of interfaced source. Otherwise, there is no way to ever update the field.

Encrypted Field: Indicates that this field is encrypted in the database. If selected, the data in the field will be encrypted when writing to the database and unencrypted when fetching from the database. This allows you to protect sensitive data. Only text fields can be encrypted.

Masked Text Field: Indicates that this field is masked with asterisks when displayed. This most commonly used for password fields.

Usage Pane: Shows documents, triggers, templates, custom screens, derived fields and other places where the field is currently used. A Usage Help Text pane enables you to see detail for any of the listed items.

Pass Through: When a field is modified that is also used in a Batch Processing screen or other custom screen, the same change is applied to those fields as well. For example, if you change the length of the Employee ID field from 12 to 6, the length of the Employee ID field will be 6 in all Batch Processing screens and custom screens. Or, if you change the table that supports a field on a field that is also used in Batch Processing, the field in the Batch Processing is changed to match. The following attributes are synchronized: caption, description, field length, edit attributes, auditable status, not used status, table name, and field name.

New System Templates

There are four types of templates as described in the sections below. The main templates screen is similar to the Letter Template screen, except it includes a Template Type field. Each of these templates uses the standard text editor. Other than the Email Closing template, which is generic text only, the other templates use the full formatting capabilities of the editor. The list of fields in all four system templates is limited to the system fields such as company name, user title, etc.

Cover Sheet Templates: These are single page documents that are automatically pre-pended to documents when they run. The template enables you to create the cover sheet just the way you want it. Cover sheets can be added to any document using the Document Properties screen for that document.

Email Closing Templates: These can be used when sending emails from within People-Trak. If an Email Template is not used for an email, the email body is plain text. This template can be used to automatically set the closing based on the fields specified in the template.

Header and Footer Annotations: These can be used with those documents that have a header and footer (Adhoc Reports, Freeform Reports, Standard Reports, etc.). A header annotation is a block of text that is placed in the header and can contain literal text and fields of your choice. The exact location is determined by your header design. A footer annotation is placed in the center of the footer. Both header and footer annotations can be added to applicable documents using the Document Properties screen.

Email Attachments

Email attachments are stored in the database so they are protected by the inherent security of the application. Attachments can be added to the database and a description provided. The attachment can then be used with any email as an attached document and can be optionally encrypted when the email is sent. When an encrypted document is emailed, there are actually two emails sent: one which indicates the password for the document to follow and one which contains the document.

Email attachments are normally PDF files such as your policy manual or excerpts thereof. You can also attach documents that have been archived with the new archive documents feature. Thus, if you have archived a particular compliance report, you can email it at any time with or without requisite encryption.

New Email Definitions

You can create and save frequently used email definitions. The definition contains specific to and from criteria as well as attachments. This makes it quite easy to select a complex email definition within an employee record, for example, in a matter of seconds.

Audit/Transaction History

There is a new Audit/Transaction History process that allows you to view audit history and transaction history. Transaction history is saved for workflows in a module by selecting the Save Transaction History check box on the General tab of Module Setup. If the Strategic Toolkit is implemented, the Save Transaction History setting is specified in the Workflows process instead. If the Self-Service Toolkit option has been implemented, transaction history allows you to see approval history on that transaction as well.

This process also includes a Purge History tab that allows you to delete audit and transaction history based on a date range.

Database Manager – New Row Modifiers

New 1: Inserts the replacement value on the top row pushing the subsequent rows down.

New +: Inserts the replacement value below the last row.

Import – New Row Modifiers

New 1: Inserts the imported value on the top row pushing subsequent rows down.

New +: Inserts the imported value below the last row. (The * modifier is retired for Import).

New Utilities

Encrypt Field: allows for the activation or deactivation of the encryption status for a field. Encryption protects sensitive data and is only allowed on text fields.

Set Display-Only Attribute: allows for the activation or deactivation of the "permanent display only attribute (such as age) for a field.

Maintain Label Types: Allows you to create or modify label types for use in the Label Templates. Besides giving you the ability to add new label types, you can also tweak existing types to more accurately reflect how the labels work on your particular printer.

Maintain Paper Sizes: Provides the same capability as Maintain Label Types.

Map Table Fields: Is used to modify the maps that determine which fields go where when a table or cross module selection is used to populate fields. The fields in the maps are constant, but you can enable or disable them as needed.

Show Logged in Users: Lets you know who is currently logged in.

Enterprise Setup – New Features

Password Change Days Field: 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.

Days Before Reuse Field: 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 Field: The number of sets of login attempts allowed before locking the user out of People-Trak. (Within the lockout attempts, the user can try three times to specify the password).

Grace Logins Field: 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.

Minimum Length Field: The minimum character length for a password. For example, 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. This Minimum Length setting can be the values 4 through 10.

Letters and Numbers Field: Is used to specify that a password must contain both letters and numbers.

Date Variables Grid: Is used to define the periods for a range of new user-defined date variables.

Desktop Setup

For each of the user types, this new program is used to specify login and desktop settings which define much of the look and feel of the product.

Company Setup – New Features

New Company Information Fields: These include: Country, Telephone, Fax, Website Address, Company Description, Heading Logo, and Default Currency.

New Date Fields: Fiscal Year Start and Fiscal Year End define the actual dates for the corresponding date variables.

Policy Manual: If Self-Service is licensed, you can attach a PDF based Policy Manual for each company.

Copy Company: A copy function allows you to create a new company and then copy the settings from any other company.

Module Setup – New Features

Default Options: You can now specify defaults for Span Companies on Search and Single Record on Select check boxes. You can specify a Default Source for Create that sets the most commonly used create method for a particular module. (The typical create options include: copy, scratch, and template. Modules have specific methods such as copying an applicant within personnel). You can specify that the emails sent to employee or other records are automatically recorded in notes. You can then also specify the category in which those notes are to be stored. You can set the module name and the module phrase if it is different from what has been specified. For example, there is a new Generic Module, which is hardly explanatory. If you customize the Generic Module for Grievance Tracking, you can change the name to be Grievance Tracking.

Dupe Check Fields: These fields allow you to check for duplicate records upon entry and update of records. You specify the fields to be compared such as social security number.

Save Transaction History Field: You can specify that transaction history is to be saved for any workflows in the module.

Link History to Notes Field: You can specify that when transactions are saved that they are automatically linked to a note that can be used to recall the transaction detail.

Manager Setup Tab: Is used to set the programs to be listed on the Manager program for the current module.

User Setup – New Features

Copy User Function: Allows you to copy settings from any user including all security settings.

Color Schemas: You can select from a set of 20 plus schemas or develop one completely from scratch.

User Active Field: Indicates if the user is active. A user can be changed to inactive when attempting to login or when they have failed to change their password. Use this field to change the active status.

Password Question Field: Use this field to set the question that is asked when the user forgets their password. Normally, this field and the Password Answer field are maintained by the user. If the user correctly answers the question (by providing the answer specified), the user will be emailed the password.

Password Answer Field: Use this field to set the answer to the password question.

Lookup Limit Field: Sets the maximum number of records to return on a lookup. This is a convenience feature to prevent long lookup times when a user simply clicks Search with no criteria. If you have thousands of applicants, this is very useful to limit the number of records returned.

Auto-Delimit Field: Causes dates delimiters to be inserted automatically as the user types.

Copy from Desktop: Is used to replace the existing tasks for a user with the default tasks for their user type that have been defined in Desktop Setup.

Define Colors: launches the Maintain Color Schemes utility. Used to customize user color preferences.

Define Tasks: Is used to modify individual user's tasks

Email Closing Field: Sets the email closing template for this user. A list of the existing email closing templates created with the System Templates program is shown.

Quick Search Favorites Grid: Is used to specify the Lookup Favorite to be used for each module when the Quick Search button is clicked by the user when looking up records.

Other: If you change a User ID, all documents and templates associated with that user are moved with the user.

Security Setup - New Features

There are now two different security setup programs. One is used to set security that is across modules: Security Setup. The other is used to set security that is module specific: Security Setup - Module. Security Setup – Module shows different values depending on the module that is currently active.

Group Designator Field: Use this field to designate this user as a group leader.

Group Name Field: Use this field to put a user into an existing group. A list of the group leaders is displayed. When a group leader is specified, all of the settings from the group leader are copied in.

Create Freeform Reports Fields: Use this field to allow the user to create Freeform Reports.

Run Freeform Reports Fields: Use this field to allow the user to run Freeform Reports.

Notes Field: Use this field to allow the user to access Category Notes. If this field is not selected, the Category Notes button will be hidden on the main toolbar.

Allow File Search in Email Field: Normally, users cannot select attachments from outside of People-Trak (these are stored in the attachments). Use this field to allow the user to select files from their computer or other network locations.

Security Setup - Module

Security is now by category. Every workflow, activity, process, table, screen, field and document now has a category assigned. If you secure a category, all of the items within that category are secured and cannot have that setting changed. This makes it extremely easy to secure whole areas of the product. If a category is not secured, you can pick and choose which items you want to secure. There are now new tabs in the Security Setup - Module process for the following: Category, Workflow, Activity, Processing, Table and Document. The Screen/Field tab information that existed before is still there but is now two separate tabs and by category.

It is now possible to secure note fields to prevent them from being added to documents and screens or viewed on documents. On the Field tab, there is a special Notes category at the bottom, which lists the note fields. You can easily secure one or all of those note fields for the current module. The Notes screen itself can be secured in Security Setup, and if the Notes screen is visible to a user, secured categories of notes are not.

Table Setup

Table Setup is a new program that combines functionality from other programs in prior versions. Tables from all modules are listed and available for update. Settings made in Table Setup are enterprise-wide.

Table Sharing: Because all companies are in a single database structure there is a new feature known as table sharing. This feature allows you to specify if a table is to be shared by all companies. Tables such as cities might be the same for all companies in your enterprise and would therefore be set to be shared. Or, if your companies are different regions, you might need sharing to be turned off. When sharing is off, each company has unique table values.

Table Type Field: Shows you the table type: Simple, Complex or Very Complex. The Mass Update check box is display only and shows you whether or not changes to the table will be mass updated to records.

Mass Update: All tables that are mass updateable now have the Allow Mass Update check box for each entry.

Audit Setup

Fields are now grouped by category and not screen since screens can be user defined.

Help

Help Menu: The Help Menu is now standardized throughout all desktops and modules and includes three menu options: Help Topics, Support Online, and Help About.

Section 1.3 - Data Entry

New Manager Programs

All modules now have a standard Manager activity for their respective records. For example, in the Personnel Management module, there is now an Employee Manager activity, in the Safety Management module, there is an Incident Manager, and so on. These activities allow you to update records in a module using a more process-oriented approach. These activities also provide non-HR users (such as managers if using Self-Service) a more user-friendly interface for updating records. In Module Setup, you define the tasks available in these Manager activities. The lookup and results fields for these standard Manager activities typically use the lookup fields for that module. In some cases, there might be additional result fields that are available as well. Some modules will also have unique Manager activities in addition to the standard Manager activity. For example, Position Control has a Candidate Manager in addition to the standard Position Manager.

General Changes

Copy: The copy option is now available in all processes that can add new items. For example, the tools that add new items (Alert Triggers, Schedule Triggers, etc.) now all have the copy option available on the File menu. When copying, the standard is now to append a "-1", "-2", etc. to the original item name whenever the item name already exists. This same naming scheme is used for new items: NEW-1, NEW-2 and so on.

All Copy options now behave the same. In order to copy an item, you need to highlight the item to be copied and then choose the Copy option on the File menu. A new item is then automatically created and the settings for the specified item are copied into the new item.

Table Maps: These are now for modification in the Map Table Fields utility. For example, the move of fields from Applicant to Employee was internal, and now it is available as a table map. This gives you more flexibility to determine what is mapped across modules and what is not. As part of this change, the mass update feature now uses table maps in all cases.

Fields returned from many of the table maps are now display only. There is no reason to override table values.

History Sorting: All history information throughout People-Trak is now sorted with the most recent changes at the top. This standardizes all history information and makes it easier to see recent activity.

Undo Feature: The Undo features now work on all applicable screens. It is now possible to undo row deletes and row inserts. The Edit History screen that shows all changes in the current record now shows deleted and inserted rows.

The Undo Screen feature works even after leaving a screen, but before saving the record.

F5 Function Key: F5 can now be used in any screen that has the run or edit capability to perform the run or edit. For example, in the Explorer, pressing the F5 key runs the current document. In the Letter Templates screen, pressing the F5 key opens the current template for editing.

Screen Help: There is a new type of help known as Screen Help. This help is also stored in the database and can be modified or updated when you create custom screens. Screen help provides a description of what the screen is used for and is available with the SHIFT + F1 key combination or the Show Screen Help button that is located next to the Field Help button on the Toolbar.

Image Fields: Import and clear functions for images are now available as popup buttons, which means they are only visible when in the image field. The image fields now behave like other fields in People-Trak. Image fields can now be included on any template.

New Help Engine

All of the latest documentation is now available by using the Help Topics option on the Help menu or the Help button at the bottom of the Tasks pane. The Help Topics option has replaced the Contents and Index options. The new Help Topics screen gives you the choice of using the contents or index view to easily jump to a given topic. There is also a search feature.

Popup Selector Changes

Select Field Popup: The fields are now organized by category rather than screen since screens can be user defined.   There is an All Fields category that lists all fields in alphabetic order.

Color Popup: Now includes a Custom option in addition to the eleven basic colors that existed before. When you select the Custom option, a screen is displayed that allows you to add any custom color you desire.

Auto Search Feature: In Field, Document and Table Popups, the cursor jumps to the specific row as you type in partial entries. This speeds selection.

New HTML Editor

A new HTML Editor has been added. This editor is called when using the HTMLabel object in custom screens (Strategic Toolkit only), creating an email template or editing one of the HTMLabel fields in People-Trak (ex: Job Description). This editor is similar to the regular Text Editor used for letter and label templates, but it doesn't allow some of the menu options.

Lookup

Quick Search Button: A new Quick Search button quickly finds records with a single click. The Lookup Favorite to use for this feature is specified in the Quick Search Favorite field per user for each module on the Quick Search tab of User Setup.

Spanning: Administrators can now span companies to find a specific record. If you specify spanning using the Options tab, records from all companies will be returned in the search list. Once you select a record from the list, only the group of records for that company is returned. If the record is from another company, you have the option of switching to that company in order to open the record for editing.

Records Features

Templates: You now have the ability to create one or more record templates that can then be used when creating new records. This can be a big timesaver. For example, in Personnel Management you can create a record template that includes all of the benefits and other standard settings for an employee. Then, when you add a new employee, you can select that template and have all of those settings automatically brought into the new employee for you. To create a record template, create a new record with all of the data you require, and in the Record Status screen, clear the Record Active check box and select the Template check box. To use a template when creating a new record, choose Template as the source (in the new Create *Record* screen described in the following section) and select the template you want to use.

Show Record Status: A new Show Record Status menu option is available on the File menu to show the status information for the current record. The screen displays whether or not the

record is active, whether or not the record is a template, the date the record was created and by whom, the date the record was last changed and by whom, and the company the record is in. The screen also displays the compound fields for the record. Employee records also have the last random date displayed and a check box to specify whether or not the record is exempt from random selection. This menu option is only available if the Record Status check box has been selected for the user in Security Setup. The Last Change information has been removed from the primary screen as a result.

New Records: When you use the New option, a new Create *Record* screen is displayed that allows you to easily enter the source and detail information to use when creating the new record. All modules have source options of Copy (enter a record to copy) and Template (enter a record template). All modules except Training Administration and COBRA also have a source option of Scratch (brand new record from 'scratch'). Some modules have additional sources of Applicant, Employee, Position, Job table or Training Course, depending on their relationships with other modules.

Record Navigation Sub-Screens: The Record Navigation buttons are now displayed on sub-screens and thus you can change records when a sub-screen is displayed. This enables browsing of data that was not possible before without unnecessary steps. For example, you can popup the Company Property for a given employee and next through company property for any number of employees. When you close a sub-screen, the primary data for the most recently selected employee is displayed.

Audit Menu: A new menu has been added along with menu options for viewing edit history, field audit history, as well as audit and transaction history.

Edit History: Displays the edit history for the current record, with the most recent change at the top. Any field that has been changed (and not yet undone or saved) is listed in the edit history. The edit history is not refreshed between screens, but is cleared between records. The edit history is also used with the Undo feature. Those fields listed in the edit history can be undone at any time. When a field is undone, it is removed from the edit history.

The edit history is also used with the Auditing feature. If a field has been specified for auditing and has been changed, it will be moved from the edit history to the audit history when the record is saved. If a field is undone and is thus removed from the edit history, the undone (and thus unchanged field) is not added to the audit history

Field Audit History: There is a new menu option on the Audit menu for Field Audit History. When editing records (not tables or other forms), you can position to any field and use the Field Audit History option to view any historical changes made to this field for the current record. For example, if you have chosen to audit the Address 1 field and an employee has moved multiple times during his or her employment, you can view all of those changes in the Field Audit History. Obviously, there will be no history if auditing has not been activated for the field or if there have been no changes to the field. If auditing was activated for the field at some point in the past and auditing did accumulate for this field, those audits will be available.

Audit History: An Audit History menu option has been added to the Audit menu and displays any audit history for the current record. This feature does honor all security settings. Audit history for fields that have been secured will not be shown when the menu option is used. For example, if salary changes are being audited and a user who does not have access to salary fields uses the Show Audit History menu option, the salary changes will not be displayed.

Transaction History: A Transaction History menu option has been added to the Audit menu and displays any transaction history for the current record. Transaction history is saved for workflows in a module by selecting the Save Transaction History check box on the General

tab of Module Setup. If the Strategic Toolkit is implemented, the Save Transaction History setting is specified in the Workflows process instead.

Batch Processing

The batch processing interface now functions like other areas in the software when creating a new record, document, etc. When you want to create a new batch, use the New Batch option on the File menu or Tool Bar. That batch is then created with a system-defined name and listed in the new Batch List area. A new Rename Batch option on the File menu allows you to rename the batch, if you wish.

The Lookup Group option now adds entries to the existing entries. To start over, use the Delete Batch to clear the batch and then New Batch to create an empty batch.

Batches are no longer postponed, but are saved for later use. When you exit, the changes you made in the current batch are saved. You also have a Save Batch option to allow you to save changes in process. If you change from one batch to another, the batch entries are also saved.

When you post a batch and all entries are posted, the Status column in the Batch List area is changed to Posted, and that batch is set to display only. If some entries could not be posted (because records were locked by other users), the Status will have a counter stating how many entries were posted out of the total number of entries in the batch. All posted entries are display only. Only the 'in process' entries may be updated and posted at a later time.

You can purge posted batches at your discretion.

Section 1.4 - Query and Reporting

Query

=My Operator: This operator is used to require that the contents of the field match the value of a field in the user's record. For example, the comparison might test for Department =My Department. Only records with the same department as the user are included. You don't have to compare the same fields. For example, the comparison might test for City =My Contact 1 City. Only records with the same City as the user's Contact 1 City are included. The record being checked for the user will be either the user's employee record or applicant record, depending on the user's status.

In and Not In Operator: These dramatically simplify queries when you are comparing multiple values in the same field. For example, the complex query below:

    Department = 100 OR
    Department = 300 OR
    Department = 500

is replaced by the simple query below:

    Department In 100, 300, 500

The Not In operator works conversely.

Anniv and Anniv-M Operators: operators have been added for use with date fields. With the Anniv operator, the month and day have to match. With the Anniv-M operator, only the month has to match. These operators would typically be used with date variables and when scheduling reports.

Query on Derived Fields: Derived fields can be used in queries. Thus, you could use the Three Percent Increase field in a query and do a search as follows:

Three Percent Increase >= $40,000.00

If there are any employees whose salary would be greater than or equal to $40,000.00 following a three percent increase, they would meet the criteria set by the query and appear as results on the report.

Date Variables: Now work with the Between operator.

Click to Paren: You can click on the Open and Close parentheses columns to insert or delete the respective parentheses symbols rather than using the keyboard.

Adhoc Reports

The Mod column on the Report Definition screen was split into two. There are now Row Modifiers and Field Modifiers. Row modifiers determine which rows from a multi-row screen are to be output. Field modifiers determine which part of the field is to be output or how the field is to be modified on output. Field modifiers are only available on date and currency fields.

Field Modifiers for Date Fields (sample date 12-31-2009)

Modifier	Description	Output
M	Numeric month	12
D	Numeric day	31
Y	Numeric year	2009
WD	Word day of the week	Thursday

Modifier	Description	Output
WM	Word month	December
WMD	Word month and day	December 31
WMDY	Word month, day, and year	December 31, 2009

Field Modifiers for Currency Fields (sample amount $23.55)

Modifier	Description	Output
W$	Word Currency	Twenty three dollars and 55 cents

When existing reports are converted, applicable field modifiers will be moved to the new column and the appropriate row modifier will be set. For example, if the M modifier has been used, the Field Modifier will be set to M and the Row Modifier will be set to 1.

Range Row Modifier: There is a new type of row modifier for selecting ranges of rows on output. You can now enter a range in the format:

> From:To
> 2:4 (from row 2 to row 4)
>
> 5:11 (from row 5 to row 11)

When you run the report, only the rows specified will be selected.

Email Break: The new Email Eject break allows you to email portions of a document to the appropriate owner. For example, if you email eject on the employee email address, you can email a group of letters all at once with each letter being emailed to the appropriate employee. Likewise, if you email eject on the manager email address, you can cause the appropriate pages of a large report to be emailed to the appropriate manager. Note that you can only email eject on email address fields. When you select an Email field, there is an additional entry in the support table for the Sort column. This is the Email sort type. It functions just like the Eject sort, but provides the special email eject capability when a document is emailed.

Percent Count Calculation: When a break is used, this shows the percent of the overall count for each break.

Percent Total Calculation: When a break is used, this shows the percent of the overall total for each break.

Spacing Field: There are now five spacing options: 1, 1.5, 2, 2.5, and 3.

Alignment Field: Documents can now be left-justified or centered using a new field on the Specifications tab.   The default is determined by a setting in Enterprise Setup.

New Document Types

Archived Documents: The new Archived Documents document type allows you to run and maintain documents that have been archived via the Output to Archive feature.

Cluster Reports: The new Cluster Report document type allows you to run several documents (labels, letters, reports, forms, standard reports) together as a group, without having to select and run each document separately. This feature is particularly valuable if you tend to run a series of documents at the end of each month, or merely on a frequent basis.

Email: An Email option has been added to the Documents menu to allow you to define an email specification much like a document specification. You select an email template or enter email text, specify the query and can attach files or a document. You can then send the email as well as save it for future use.

Forms: There is a new Forms document type that allows you to combine a form and a query to produce a set of output forms. There are standard forms provided by People-Trak that allow you to output information on attendance balances, benefits enrollment, and compensation history as well as other information.

Freeform Report: There is a new Freeform Reports feature that enables you to create reports using a SQL statement. This will normally be used when you wish to create a complex report that cannot be accommodated with the standard Adhoc Report Writer. It will also enable us to create reports that we can send you to meet unique requirements.

The Freeform Reports feature bypasses all field security. If a user is allowed to create a Freeform Report, he or she can access any field within People-Trak. For this reason, there are special security settings for the Freeform Reports feature. You can allow users to create and/or run freeform reports in Security Setup.

Updated Document Properties

Description Field: Allows you to capture a meaningful description of the report.

Email Distribution: Emails can be sent to various email address from the Address Book as well as to any named Position. In addition, you can now specify the email distribution list using a query. If you are accustomed to using the Lookup favorite feature in People-Trak to quickly select records for editing or for batches, you can now use these same favorites to specify dynamically selected email distribution lists. For example, if you have a favorite that selects those employees in a given department and you use that favorite as an email distribution list, the list of employees to receive the email will be dynamically selected at the moment the email is sent. If a new member was added to that department just seconds before you email, that member will be sent the email.

Encrypt on Send Field: Use this field to cause the document to be encrypted when it is emailed.

Spanning Grid: Use this grid to specify a list of the companies to be included in the report. It is valid for administrative users only.

Cover Sheet Field: Use this to specify a cover sheet template to be pre-pended to this document.

Header Note Field: For documents that have headers, use this to specify the annotation template to be used.

Footer Note Field: For documents that have footers, use this to specify the annotation template to be used.

Document Viewer

Output to Image: With the Output to Image option you can now output the current page of a document to an image file.

Output to Archive: Allows you to archive the current document you are viewing. When selected, an Output to Archive screen is displayed in which you can enter a description and category for the archived document. The document can be viewed again later using the Archived Documents option on the Documents menu.

Output to Email: Has been enhanced. If a document uses the new Email break feature, you are notified upon choosing the Output to Email option that this break exists and you are given the option of continuing or not. If you continue, portions of that document are emailed to the appropriate owners, and you are notified that those emails were sent. As before, the Output to

Email screen will be displayed with any email addresses that were specified in the Document Properties, and you can add additional email addresses at that time, if required.

New Key Functions: The Home and End keys move to the first page and last page of the document, respectively. The arrow keys scroll in larger increments for faster viewing. The Down Arrow and Up Arrow keys can now be used to scroll through the document and behave just like the arrows on the vertical scroll bar. There are zoom buttons on the toolbar.

Record Bar: When a document contains forms or letters (one per record), a record bar is displayed to aid in navigation between the records. You can drop down a list of the records that have been qualified or you can use the Next, Previous, First, or Last buttons to navigate. If the letter is a multi-page document, the Page buttons (Next, Previous, First, and Last) are used to move between the pages of the letter.

Template Features

Template Editor: The template editor has been enhanced. You are now able to save your work during an editing session, add background color, redo an undone change, and take advantage of other interface enhancements that make the editor easier to use.

Template Field Row Modifier: In a few places in People-Trak, there are one-to-many-to-many data relationships. For example, on the Benefits screen, a plan in the Benefit Plan Enrollment grid can have multiple enrolled dependents in the Enrolled Dependents grid. If you want to do a benefits form for an employee listing the enrolled plans including dependents in each plan, you not only need to specify the row modifier for the plan, but also the row modifiers for the dependents in that plan. When inserting a field in a template, you now have the ability in the Row Modifier field to put in *Row.SubRow*. For example, if you wanted to see the dependents in the first benefit plan, you would insert fields with a row modifier of 1.1, 1.2, 1.3, and so on.

New Email Templates: You can now define email templates like other letter templates. These templates can be specified for use wherever an email is created throughout People-Trak. All relevant mail-merge is performed into the template so that each email is personalized.

New Form Templates: There is a new Form Template process that allows you to create complex form templates for output purposes. You can easily add fields, frames, grids and other objects to create output documents with any information from within People-Trak. You have the option of selecting a PDF form as a background. Then, using a drag and drop tool, you can position the fields and other objects at the appropriate location on the form. When the form template is complete, you can create documents based on the form template by using the Forms option on the Documents menu. A special option in this feature enables you to decide if you wish to actually print the form background, if there is one. If you have preprinted forms such as numbered forms, you can use the imported form to layout and maintain the form. However, at print time, you can cause the data only to be printed, thus placing the appropriate data at the appropriate locations on your form without the form background.

There are standard forms provided by People-Trak that allow you to output attendance balances, benefits enrollment, compensation history, and other information. It is possible to convert an existing custom screen into a form template with just a few clicks.

Letter and Label Templates: These have updated screens that show details about the template and a description that defines the purpose the template. There are minor changes to the template editor. You can now use images in templates and can select fields from the database that translate to images when merged (i.e. Employee Photo).

Letter and Label Utilities: There are new utilities to enable you to create new standard sizes for letters and labels or to tweak settings so that labels work more accurately on your printer.

Section 1.5 - Essential Tools

Inbox

There is now one combined Inbox across all modules. The Inbox is now more easily accessible by using an Inbox shortcut on the Shortcut Bar. The shortcut also includes an Inbox item count in parentheses. The Inbox is updated to reflect a new count based on the same interval as defined for the user in the Alarm Frequency setting in User Setup.

Maintain Tables

The Maintain Tables program has a category list box on the left, allowing you to find tables by category. There are Edit, View, Print and Update buttons on the right to allow you to do those functions.

Fixed tables such as Gender, Blood Type, etc can be accessed by selecting the View button. These tables are display only and cannot be edited.

To print complex tables, you can select from a list of the fields in the table and select any combination. For even more complex reporting, you can use the new Freeform Reports feature.

If you edit a table that supports mass updating, you are now asked upon exiting if you want to mass update the table. If you choose to mass update, any entries in the table that have the Mass Update check box selected will have their changes updated to records in the database. The Update button on the Maintain Tables screen can be used to manually mass update a table, which might be necessary as part of importing data.

Tables are now locked so that only one user can edit the table at a time. There is a new utility to clear the locks should a user inadvertently shut down with People-Trak open (and the table locked).

Complex tables (those with a listbox to the left such as Attendance Account, etc.) can now be sorted or ordered as desired using a new Sort option.

Set Alarm

The Set Alarm tool is a new feature that enables you to set date and time based reminders. The alarms are accurate to about 5 minutes. You can set alarms for yourself or for any other People-Trak user. The alarm goes off within People-Trak. So, if you did not log into People-Trak on Tuesday, but alarms were set for Tuesday, you will see these alarms when you first log in on Wednesday (or the next day you log in). Alarms are also listed in your Inbox.

Alert and Schedule Triggers

Alert triggers and schedule triggers are very similar now. Their only difference is what the condition is based upon. In an alert trigger, the condition is based upon a date in the database (and now additional fields as well); whereas in a schedule trigger, the condition is based upon a certain point in time.

Alert Query: In addition to the standard method of setting an alert trigger, it is now possible to use a query. This provides tremendous flexibility in obtaining the right condition for the trigger.

There are four types of actions that can be performed with alert and schedule triggers.

Assign Task: Assigns a task to any user, including you. There are eight different types of tasks: activity, administration, create, document, edit, link, processing and table. Once the trigger takes effect, the selected task will be sent to the specified user's Inbox. From the

Inbox, the user can execute that task, which will run an activity, launch an administrative action, create a new record, run a document, edit records, access a link , run a process, or maintain a table.

Send Email: Sends an email to the specified recipients. You have several different address types to which you can send an email, and you can enter multiple recipients as well as enter message text or use an email template.

Address Book	Select from several email sources across modules field
Field Substitution	Select an email field (Alert Triggers only)
Org Chart	Select the org chart level (PM module/Alert Triggers only)
Position	Select the position

Send Message: Sends a message to the specified user's Inbox.

Set Alarm: Sets an alarm for yourself or another user for a specified date and time.

Email

Email Document Type: An Email option has been added to the Documents menu to allow you to define an email specification just like a document specification.

Send Email: The Send Email action is also available from within triggers and within records from Email type fields.

Each of these methods for sending an email has been standardized to use the same Message and Attachment tabs. On the Message tab you can optionally specify an Email Definition, which then defaults message and attachment information that can be overridden. Email definitions are specified using the Email Definitions process on the Administration menu. The Message tab allows you to specify who the email is from and what template or text to include in the email. The Attachments tab allows you to specify what files or documents to attach to the email as well as whether or not you want to add the email to the notes of the record. More details on fields on these two tabs are described later in this section.

Email To: Deciding to whom to send the email is done in different ways. From within a record group, you choose to use the current record, current group and/or various address sources. From within the Document Viewer, you choose from various address sources or use the address sources assigned to that document. From the Email document specification, you use a query just like any other document to determine the records to include and then specify what address source to use for the records. From the Send Email trigger action, you choose from various address sources. The activities that send emails each have a method of selecting to whom the emails are sent. All methods of sending an email have CC and Blind CC fields to allow you to also copy other recipients. An Address Book option allows you to easily select To, CC and BCC email addresses from a list of email sources from throughout People-Trak as well as from your Outlook address book.

When sending an email using a record group, the Show button is no longer necessary because you can now see all email addresses in the To text box. When sending an email from within a record group, you no longer receive the dialog box asking if you want to use the current record or group; the email screen is displayed using the current record, and you can click the new Group button to use the current group instead.

Template or Text: In all email screens, you have a choice of using an email template or typing in the email text. Closing text can be defined at the user level in User Setup and you have a choice in each email whether or not to add that closing to the email text area. The closings available for selection are defined in the new Templates option on the Administration menu.

Attachments: Two of the attachment fields are used for specifying attachment files and the third attachment field can be used to attach any People-Trak document. The first two attachment fields have a popup button that allows you to choose from Email Attachment documents. A File Search button is available while in those two fields that allows you to select any file to which you have access. It is possible to hide that File Search button for a user by clearing the Allow File Search in Email check box in Security Setup. On any of the attachments, you have the ability to encrypt the attachment if it is a PDF file (all People-Trak documents as well as attachments defined in the Email Attachments process are stored in PDF format). On People-Trak documents and attachments, the encrypt check box is defaulted based on the encryption setting in the document or in the Email Attachments process for that attachment but can be overridden. Encryption is recommended for a document with sensitive information on it. If encryption is selected, the document will be encrypted and password protected when attached to an email. The recipient will receive an email informing them of the password for the document that is sent in a separate email.

The Email specification screen also has the three attachment fields (and encryption capability), but the first two attachment fields do not have the File Search capability because this is not a real-time process. Only Email Attachment documents are available to be chosen because those documents are made available by Administrators and are accessible by all users.

Add Email to Notes: All email screens have this field and a corresponding Note Category field. The Add Email to Notes check box is automatically defaulted as selected if the Add Email to Notes check box is selected for the current module in Module Setup, and the Note Category field is defaulted to its setting in Module Setup as well. You have the choice within each email of whether or not you want to add that email and any applicable attachments to the notes of the record associated with each email address in the To field.

Notes

Section 2.1 – General Changes to All Modules

Manager Programs

Each module has a standard manager program that allows you to create a focused user interface for the records in the module. You can select the lookup criteria and the various workflows, reports, and activity programs that you wish to run from this manager. Many powerful and useful options make this a powerful addition for both HR and managerial users.

New Documents

Many new reports, forms, templates, graphs, cluster reports and other documents have been added.

Category Bar

The Category Bar is used to navigate among the screens and category buttons that are available to you within the current category. Four category buttons are available on the category bar.

Category Documents: Allows you to select and run all documents for the current category within the module.

Category Tables: Allows you to view and edit tables for the current category. Tables that are non editable are now viewable.

Category Notes: Notes are now available within every record data entry screen using the Category Notes button on the toolbar. Allows you to view all notes for the current category. This button is only available if the Notes check box is selected for the user in Security Setup.

Category Help: Allows you to view help text for all screens, tables, documents, templates, derived fields, processing, triggers, activities and workflows within the current category.

User Fields Screen

With the exception of the Personnel module, which has an even more extensive set of user fields, all modules have a new User Fields Screen. It contains the follow fields.

- 10 text fields
- 10 date fields
- 10 currency fields
- 5 check boxes
- 2 memo fields

This new User Fields screen has a User History sub screen that contains a grid with 2 text fields, 2 date fields, 2 time fields, 2 checkbox fields, and 2 currency fields.

Each of these screens is less likely to be used as a screen itself, but as a collection of fields that can be added to screens of your own design.

Section 2.2 - Personnel Management

Personal Screen

Pager/Cellular Field: has been broken into two fields (Pager and Cell Phone) to allow for the occasion where someone has both methods of contact.

Emergency Contacts Sub-Screen: Three new fields have been added for each contact: Other Phone, Email, and County. County is now filled from the main address when the AutoFill button is used.

Dependents Screen: The Dependents screen used to be one of the primary screens. It is now a sub screen of the Personal screen and accessible by clicking the Dependents button.

Education Screen: The Educational Background grid used to be on the primary Background screen. It is now a sub screen of the Personal screen and accessible by clicking the Education button.

Tuition Date Field: Has been added to the Educational Background grid to allow for the calculation of employee training costs, which are then shown on the new Pay History screen as well as on the Employee Cost reports.

Experience Screen: The Employment History grid used to be on the primary Background screen. It is now a sub screen of the Personal screen and accessible by clicking the Experience button.

Employee Source Fields: Have been moved from the Status screen to the Source sub screen on the Personal screen. Now includes the ability to attach and show the employee's resume. If there is a resume attached to the applicant's record when hired, that resume will be brought over to the employee record automatically during the transfer of data from applicant to employee.

Wellness Screen: The Medical/Wellness screen used to be one of the primary screens. It is now a sub screen of the Personal screen and accessible by clicking the Wellness button.

Exams Screen: The Medical Exams grid used to be on the primary Medical/Wellness screen. It is now a sub screen of the Personal screen and accessible by clicking the Exams button.

New ID Screen: The ID screen contains the three graphic fields: Employee Photo, Employee Signature, and Employee Bar Code. Buttons are provided to import and clear these images. These are named fields and can be used in forms and letters as desired.

Status Screen

Status History Grid: Has been moved onto the primary Status screen and is now display only. You must use the Update button to update the Status History grid with the current info. The COBRA fields have been removed and COBRA is now invoked and run from within the COBRA module only. Exception Days are now included in the calculation of seniority used for accrual bump purposes.

Prior Service Days Field: Is used to add days to seniority (the reverse of Seniority Exception Days). If you wish to use an employee's latest seniority date for various eligibilities, but you wish to track prior days in the count of years, months, and days, this field enables you to do just that.

Vets-100 Support: Additional fields add support for the updated Vets-100 report, and you can now track the name of the military unit for reservists.

Company Property Sub-Screen: Has been moved from the Personal screen to the Status screen. The Issue Date and Return Date columns have been added.

Compensation Screen

Compensation History and Position History Split: Compensation history and position history have been separated so that each can advance independently of the other. There are two separate screens and two separate database tables. To facilitate reporting, the compensation history rows contain the position ID held by the employee when the pay rate actually changed. The position history rows contain the pay rate at the time the position was changed.

Current Pay/Next Pay Change: The Compensation screen now contains the current pay information in a separate Current Pay frame. Next Pay fields have been added to track a future pay rate change. There is a Make Effective button to quickly actualize the change. This will move the next pay to the current pay. In the Current Pay frame, the Update button moves that information to the first row of the compensation history grid, which is display only. The Remove button allows you to remove a row from that grid if necessary.

Salary Step: A Salary Step screen has been added to the Compensation screen that allows you to easily change the pay rate using salary steps that have been pre established in the Salary Grade table.

Other Pay Screen: The Other Pay screen has been enhanced to allow for tracking incentive programs in which an employee may be participating. You can track the starting and ending dates, estimated payout and actual payout.

Updated Statistics Screen: The Statistics screen has been updated to carry a second column of salary equivalents. The second column is listed in the "other currency" used for the employee. So, there is one equivalent for the dollar amounts and one for the other currency. The default currency for each company can be set in Company Setup.

Pay Rates Screen: A display-only Pay Rates subscreen has been added to the Compensation screen. When you change the base pay rate for an employee, the rates on this sub screen will be recalculated based on the pay rate calculations specified on the new Pay Rates table.

Pay History Screen: A display-only Pay History subscreen has been added to the Compensation screen. This screen shows employee cost information, which can then be used for reporting purposes. The Employee Cost (YTD and Prior Year) standard reports show this same information. The NightRun process calculates these employee costs on a daily basis and rolls the information to the prior year on a yearly basis.

Multiple Pay Rates: There is a new Pay Rate table that allows you to define up to 12 different standardized pay rate codes. The rate codes can be defined as discreet, individual values or can be defined as multiples against the employee's base rate. The multiplier can be a percent or an additional value. For example, the rate for time and one half can be setup as a percent modifier with the percentage being 150. The rate for double-time can be setup as a percent modifier with the percentage being 200. Or, if the pay code is based on a shift premium and is a fixed amount per hour such as 25 cents, you can use an addition modifier type and set the amount to .25. On the Compensation screen, when you change the base pay rate for an employee, the rates on the new Pay Rates screen will be recalculated.

Position Screen

Current Position/Next Position Change: The Position History screen now contains the current position information in a separate Current Position frame. Next Position fields have been added to track a future position change. There is a Make Effective button to quickly actualize the change. This will move the next position to the current position. In the Current

Position frame, the Update button moves that information to the first row of the position history grid, which is display only. The Remove button allows you to remove a row from that grid if necessary.

Position Details Screen: This screen includes the job detail information for the position, which used to be on the Job Details sub screen of the Compensation screen. This screen also contains the Job Summary and Requirements Summary fields from the Position Control module or Job table. These fields are normally populated when a position is selected from the Position Control module or a job is selected from the Job table.

Organization Screen: This screen includes the organization detail for the position, which used to be on the Job Details sub screen of the Compensation screen. In addition, there are now five "user" defined organizational levels for company, division, department, section, and unit levels.   This screen now has Email fields for all organization levels. Also, the supervisor information has been moved to its own area on the screen.

Location Screen: This screen includes full detail for the working location, supported by the location table.

Grade Screen: This screen contains the grade information for the position, which used to be on the Job Details sub screen of the Compensation screen.

Shift Screen: This screen includes the shift information for the position, which used to be on the Job Details sub screen of the Compensation screen.

Job Duties: This screen includes detail for the job duties, supported by the job duty table.

Description: This screen includes the description of the position, supported by the job table.

Temporary Assignments Screen: Replaces the Job Splits screen that used to be a sub screen of the Compensation screen. It includes a grid-based screen for tracking temporary assignments. This is useful when an employee is assigned to another position temporarily either full-time or concurrently with their current position.

Job Support Option: People-Trak is designed to use the Position Control module as the source of job/position information in the Personnel Management module. Some companies do not use or are not yet ready to use the Position Control module for this purpose. Instead, they prefer to use the Job table; this is now possible. In the Module Setup process for Personnel Management, you can select the Job Support option (Position Control or Job Table) you wish to use. When this option is changed, the screen that is used for Position is switched to accommodate the specific method you prefer.

Performance Reviews Screen

Now includes a numeric rating column.

Performance Batch: Has been modified slightly to support the changes to the main screen.

Benefit Screen

Benefits and Benefits Future Enrollment have been split into two separate screens with different field names for each screen. This corrects the problem with reporting on benefits in forms and letters. The Prior Benefits screen is now a sub screen on the primary Benefits screen. (The combo box has been deleted).

Waive Coverage: This screen allows the user to decline benefit enrollment. This can be done by opting out of all benefits offered or by declining at the individual program levels.

Life Event: Temporarily allows an employee to make changes to their benefit enrollment via an open enrollment process. This is most commonly utilized after life events take place such as a marriage or birth of a dependent.

Enrollment Details Screen: Supports each benefit plan includes full detail for each dependent entered on a grid. It is now possible to track benefits eligibility by dependent. Dependent information is readily populated because the entries are supported by the dependents list keyed for the employee.

The Employer Portion of the benefits amount could only be calculated in version 7 as a percentage of the overall benefit amount. In version 9, the Employer Portion has an equation section, just like the Employee Portion.

There are new Benefit Program fields that have been added to make the Benefits feature program centric and not random plan centric.

Retirement Screen: Now tracks history, so there are now Current Participation and Prior Participation grids. A new Archive Plan button allows you to move a plan from current to prior. A new Retirement Program field has been added to both grids. This makes retirement plans program centric as discussed above regarding the Benefits feature. It has also been updated to notify users when a person's "take rate" will cause the annual amount to exceed the allowed maximum. For example, if an employee's take rate is $1,000 per month for a 401K program, this will exceed the maximum $11,000 allowed under IRS guidelines.

Training/Competency Screen

Tracks Screen: Contains a list of the tracks that the employee is working on. Each line has a sub screen that contains the courses in that track. If you create a new track and select the track code, the list of courses will be updated with the courses associated with the track.

New Certification Screen: Certifications granted by completion of courses taken via the Training Administration module are automatically updated on the Certification screen.

Attendance Screen

The Calendar button that was on the Attendance History and Scheduled Time Off screens has been moved to the main Attendance screen. This calendar now shows both history and scheduled information and allows you to print 3 month or 12 month reports of that information based on an ending month you choose.

An Accruals button has been added to allow you to calculate and post accruals for the current employee.

Attendance Details Screen: The entire table is updated to the employee record when accounts and levels are selected. The detail is visible (display only) on the Attendance Details screen for each account and can be reported on as necessary.

Attendance History Screen: This screen is now display only as it is intended to be updated using the Attendance batch processes. The Amount column has been renamed to Hours, which is more accurate. In addition, the Account Code field has been moved up as a dropdown on the Tool Bar.

Scheduled Time-Off Screen: This screen now has a Request Date field. The information on this screen can now be entered via the new Timeoff Request Batch option on the Processing menu.

Work Days Screen: This screen allows you to specify the days and hours worked by the position. This information is then used when automatically spreading the hours in the new Timeoff Request activity.

User Fields Screen

User Fields Screen: Now includes 2 additional memo fields and 5 checkbox fields.

New User History 1 Screen: Provides a grid with 2 text fields and 2 date fields.

New User History 2 Screen: Provides a grid with 3 text fields, 2 date fields, 2 time fields, 2 checkbox fields, 2 currency fields, 2 numeric fields, and 2 memo fields.

New User History 3 Screen: Provides 10 text fields, 6 date fields and 5 checkbox fields.

New User Fields 2 Screen: Provides 10 text fields, 10 date fields, 10 currency fields, 2 memo fields and 5 checkbox fields.

New User Fields 3 Screen: Provides 10 text fields, 10 date fields, 10 currency fields, 2 memo fields and 5 checkbox fields.

Each of these screens is less likely to be used as a screen itself, but as a collection of fields that can be added to screens of your own design.

Activity Programs

Attendance Manager: The Calculate Accruals, Post Accruals, Purge Attendance History and Purge Scheduled History processing has all been incorporated into a single Attendance Manager on the Activities menu.

One of the new standard tasks is Update Accounts, which is used to update attendance records with the latest entries and sort order from the Attendance Account table. This makes this kind of update much more controlled because it may affect reports that are depending on accounts being in a certain order. Those reports will need to be updated accordingly. The mass update feature in the table itself now only updates existing data in the attendance records.

Attendance Calculator Update: The Accrual engine used for computing accruals in batch format has been modified to also accrue for a single employee record. This feature allows a substantial update to the Attendance Calculator that is used to estimate time off for an employee at a future date. It now takes into effect rollovers that occur during the estimation period.

New Activity for Random Drug Test Selection: The new Random Employee Selector activity allows complete random selection (accepts recent repeats) or modified random selection (disallows recent selections) for drug testing. You can specify the group and the number of selections. Of course, the feature can be used for randomly selecting employees for other purposes as well. You have the option of printing a report of those selected, creating a medical exam batch, and/or send a notification email. You can also send emails to other recipients

Processing Programs

Scheduled Time-Off for Attendance Batch: The Attendance Batch Processing process now allows you to search for scheduled time-off that is relevant since the last batch was processed. When you select the new Lookup Scheduled Time-Off option on the File menu, scheduled time-off is loaded into the batch so that you can simply record it or override it if it did not occur as planned.

Timeoff Request Batch: A new Timeoff Request Batch option has been added to the Processing menu. HR can now easily enter time-off requests in batch mode. There is an Update button that will spread the hours across the days for you, depending on the new Work

Days schedule for that employee's position. There is also an audit report that allows you to see that day's time-off transactions.

New Medical Exam Batch Processing: A new Batch Processing process has been added for medical test results.

Attendance Account Table

Payable on Separation Field: This check box, allows you to specify whether or not the account should be included in the Value of Accrued Time cost category when calculating employee costs (shown on the new Pay History screen and on Employee Cost reports). It also now has a Show on Calendar field, which allows you to specify whether or not the account should be shown on the calendar. Accounts like hours worked should not be shown on the calendar.

Fixed Account Order: If you add, delete or sort accounts in the Attendance Account table, you now need to use the Update Accounts in the Attendance Manager to have those changes reflected on the Attendance screens. The mass update of existing information is still done from within the table itself.

Benefits

New Benefit Administration Module: This module is used to define your overall benefit programs. Whereas the traditional People-Trak Benefit table had been used to define plans, this module is used to define programs such as medical, dental, life, and supplemental into which the plans will be added and defined. When performing enrollment, it is far easier to select the appropriate plans from a benefit program (where elibigility is actually defined) than to select plans and not know what is available or for which plans the employee is eligible.

Overall program eligibilty is set in the Benefit Administration module via the Benefit Program screen. Basic Eligibility fields define general rules such as age and length of service and Advanced Eligibility utilizes the standard query tab where you can define virtually any type of eligibility rule.

If an employee is not eligible for a program, they will not be eligible for any plan within that program. If an employee is eligible for the program, eligibility for specific plans will be determined by the specific rules defined for that plan.

Extendibility and portability according to COBRA guidelines are now defined at the program level, not the individual plan level.

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

Benefit Plans (Current and Future Enrollment): All benefit plans are to be placed into one of the defined programs using the Benefit Plan or Future Enrollment Plan screens in the Benefit Administration Module. The general eligibility rules are defined at the program level. The Eligibility subscreen is used to determine employee eligibility for the specific plan. The deduction code field is now supported by the overall Deduction table.

The Coverage and Premium formulas have been redesigned to be like derived field formulas. You can choose from any numeric or currency field in the Personnel Management module as well as use rounding options as needed. The Test button can be used to see the results of the formula for a given employee with the results shown in the new Result area.

New Retirement Program Table: This table is used to define your retirement programs. All retirement plans are defined for each retirement program. Overall retirement program eligibility works just like defined above for benefit programs. As with the Attendance Account table and the Benefit Administration module, the values in the Retirement Program table are returned to the employee record at fixed locations. As with benefit plans, all retirement plans are placed into one of the defined programs in the Retirement Program table. Employee and Employer formulas in this table have been redesigned to be like derived field formulas. You can choose from any numeric or currency field in the Personnel Management module as well as use rounding options as needed. The Test button can be used to see the results of the formula for a given employee with the results shown in the new Result area.

Benefit Screens: The Benefit and Benefit Future Enrollment screens have been updated to reflect the new Benefit Administration module.

The screens are now program centric and not random plan centric. The program entries in the Benefit Administration module determine the primary entries on the Benefit screen. As indicated above, if you define five programs, these five programs will be the programs you see in each record.

When the employee is eligible for a program, the list of plans that will be shown for that program will based on the eligibility rules for the plan. So, even if an employee is eligible for a "Medical" program, the employee may not be eligible for all plans.

You now access enrollment details by clicking the Details button. The Benefit Enrollment Detail screens (current, future and prior) have had the following fields added to them: Program Description, Enrollment Status, Close Enrollment On, Coverage Amount, Coverage Type, Premuim Description and Premium Type

Carrier Screen: Has been added to the Benefit and Benefit Future Enrollment screens that allows you to view information about the carrier for a specific plan.

Archive Plan Button: Has been added to the Benefit screen that allows you to easily archive a plan that has been dropped or cancelled. That plan row is removed from the current enrollment grid and added to the grid on the Prior Enrollment screen.

Retirement Program Field: Has been added to the Retirement sub screen. This makes retirement plans program centric as discussed above regarding benefit plans.

Benefit Reports: Various pre-defined reports provided with People-Trak have been updated to reflect the changes based on the new Benefit Administration module. Several new reports have been added as well.

Because the Benefit Administration module places specific benefit programs on specific rows in the enrollment grid, it is now far easier to report on specific plans and programs. For example, you can query on a specific row, knowing that that row is a specific program type such as "medical". When plans were selected randomly from the list, it was impossible to query effectively.

Payroll Data Tracking

The Payroll (Data Tracking) option gives you access to a new display-only Payroll Information screen in the Personnel Management module. This option also adds the Payroll tables described in the sections below.

Jurisdiction Table: This new table is used to define national, state, and local jurisdictions to assist in the tracking, reporting, and payment of taxes, garnishments and other fees.

Deduction Code Table: This new table is used to define and track deductions used by the organization. This includes simple deductions such as Medicare as well as more complex

deductions such as garnishment. Each deduction can be specifically assigned to a jurisdiction. It is now possible to track multi-state deductions within the same employee record by simply having a deduction code for each relevant state in the employee record. A unique feature within People-Trak is the ability to define a threshold amount for each deduction. You can create alerts that notify you when the threshold is reached so that errors are avoided.

Earning Code Table: This new table is used to define and track the various earning codes used by the organization. As with deductions, you can assign earning codes by jurisdiction. This allows you to track earnings by jurisdictions if desired. So, if an employee has earnings in multiple states, you simply track the earnings against the individual state jurisdiction. The threshold feature enables you to prevent data entry errors by trapping amounts that exceed the threshold. For example, if an employee keys 400 hours during a pay period instead of 40, the threshold, which might be set to 50, would indicate an error long before an actual check error could be made.

Section 2.3 - Benefit Administration (New)

The Benefit Administration module is used to define and maintain all benefit programs and plans that are offered by the current company.

Activity Programs

Benefit Program Manager: The Benefit Program Manager is listed on the Activities menu. As with the standard Managers, you define the tasks available in this manager in Module Setup. The lookup and results fields for this manager use the lookup fields for the Personnel Management module.

Update Benefit Programs: This task is used to update records in the Personnel Management and COBRA modules with the latest entries and sort order from the Benefit Administration module. This makes this kind of update much more controlled because it may affect reports that are depending on programs being in a certain order. Those reports will need to be updated accordingly. The mass update feature in the module itself now only updates existing data in those records.

Update Current Benefit Plans: This activity is used to update all current benefit programs flagged for mass update into the appropriate employee and COBRA current benefit records. Coverage and premium values will be recomputed as necessary.

Update Future Benefit Plans: This activity is used to update all future benefit programs flagged for mass update into the appropriate employee and COBRA current benefit records. Coverage and premium values will be recomputed as necessary.

Update Retirement Programs: This task is used to update records in the Personnel Management module with the latest entries and sort order from the Retirement Program table. This makes this kind of update much more controlled because it may affect reports that are depending on programs being in a certain order. Those reports will need to be updated accordingly. The mass update feature in the table itself now only updates existing data in those records.

Benefits Reconciliation: This task is used as often as desired to compare employee records to the enrollment and eligibility rules defined in the Benefit Administration module.This allows you to catch errors in enrollment and eligibility prior to billing.

Now that benefit programs have been added to People-Trak, the checks that were done at the plan level are now done at the program level. A check for advanced elibility is now done at the program level as well. The check done at the plan level is now for plan eligibility.

Future Benefits Reconciliation: This task is used as often as desired to compare employee records to the future enrollment and eligibility rules defined in the Benefit Administration module. This allows you to catch errors in enrollment and eligibility prior to billing.

Now that benefit programs have been added to People-Trak, the checks that were done at the plan level are now done at the program level. A check for advanced elibility is now done at the program level as well. The check done at the plan level is now for plan eligibility.

Retirement Reconcilliation: This task is used as often as desired to compare employee records to the enrollment and eligibility rules defined in the Retirement Program table.This allows you to catch errors in enrollment and eligibility prior to billing.

Now that benefit programs have been added to People-Trak, the checks that were done at the plan level are now done at the program level. A check for advanced elibility is now done at the program level as well. The check done at the plan level is now for plan eligibility.

Benefits Enrollment Process: This activity is used to selectively update future enrollment information from the future benefits area to the active benefits area when the overall period is closed and benefits for the new benefits year are effective.

Section 2.4 - COBRA Administration

COBRA records are now initiated from within the COBRA module. During the initiation process, you can select the employee or dependent for whom the COBRA record is being created.

Personal Screen

The Contact Information frame has been standardized to be the same as in the Personnel Management module.

Benefit Screen

The Benefit screen has been modified to conform to the changes in the Personnel Management module, including the new Benefit Program level. The Benefit Plan Enrollment grid is now easily viewable on the main screen, with a Details button to look at details for the current plan. The Prior Enrollment information is available using the Prior Enrollment button.

Eligibility rules for COBRA extendibility and portability are now defined in the Benefit Administration module.

Benefit Future Enrollment Screen

The Benefit Future Enrollment screen has been modified to conform to the changes in the Personnel Management module, including the new Benefit Program level. The Future Enrollment grid is now viewable on its own separate screen, with Enrollment Details and Carrier Details buttons for future enrollment plans.

Qualifying Events

A Leave of Absence entry has been made to the internal table that supports the Qualifying Event field on the Event History screen.

Section 2.5 - Training Course (New)

If Training Administration is licensed, the Training Course table is superseded by the Training Course module because it allows for greater expansion of the features.

Section 2.6 - Training Administration

This module is used to set up and administer an in-house training program. There are a number of powerful features that enable you to track costs, schedule trainers and facilities, and enroll students. You can establish pre-requisites for courses, check for double-booking of students, instructors, facilities, and equipment. You can track costs with a full departmental chargeback system.

The meeting schedule information now includes a Details button that shows the instructor and facility details. This information is now available for reporting as well.

The Close Class logic now compares metric points for each student against the graduation requirement points for the class. Only those students who meet the points are graduated.

Section 2.7 - Contact Management

The new Contact Management module has reports, alerts, alarms, scheduled items and all other features available in a module. Existing contact data will be moved from the version 7 contact feature into this new module.

Section 2.8 - Generic Module (New)

A Generic Module has been added to People-Trak and is included as part of the Strategic Toolkit option. This module allows you to create your own module and track whatever you desire. For example, you could use this module to track expenses, grievance issues, etc.

Section 2.9 - Requisition Tracking (New)

A Requisition Tracking module has been added to allow for requisitions to be entered outside of the Position Control module. In a Self-Service environment, this allows managers to enter and update requisitions. It also makes it possible to put a requisition through an approval process. Requisitions are no longer entered in the Position Control module. After a requisition is posted to the position, it is display only because control has now been passed to Position Control.

Section 2.10 - Position Control

This module is the core of the recruiting component and it also drives the performance appraisal process, recurring training requirements, and extensively tracks the cost of the position above and beyond recruiting.

Portions of the Applicant Management module that related to managing the position were moved into this module as well. The Applicant Management module is now a simple repository of applicant information and Position Control is the driving module for managing candidates.

Creation of requisitions is now done in the new Requisition Tracking module and no longer done in Position Control.

Based on Job Table: The Position Control module uses the Job table as a support table. When you create a position, it is normally based on a previously created Job. All of the data described above is moved into the position from the job. You can then customize the position by adding or deleting duties, review items, screening questions, or hiring process items as necessary for the particular instance of the job.

The Training button is used to select and define specific training courses that are required for the position.

The Description button displays the HTML Editor to provide a free form detailed description of the position.

Candidates or Applicants: There is a distinction between applicants and candidates. An applicant is someone who has completed a profile and would like to be considered for a position in your organization. A candidate is someone who has actually applied for a specific position and whose application for that position has been accepted. This means that they have met the minimum requirements from the screening questions (if you have used them) and the requirements for the position (if you have activated this feature for this position).

When candidates are accepted, they begin to be tracked in detail in both the Position Control and the Applicant Management module. We track the results of the screening questions, the results from the requirements screen, and the results from each step in the screening process. All of these results can then be used to rank and order candidates in a meaningful way. You can still hire a jerk, but they will indeed be a qualified jerk.

The candidate information in Position Control is purged from Position Control when one candidate is actually hired. However, all of the detail is retained in the Applicant Management module for later reporting purposes. Disqualified candidates can be put on a

waiting list just in case the selected candidate is a "no show", fails a deferred drug test, or simply does not cut it.

Position Cost Tracking: CFOs and CEOs are now demanding to know real position costs. This not only includes recruiting costs, but also an ongoing training cost, OSHA costs, salaries, etc. Version 9 tracks a broad range of costs associated with a position. If there is an accident and it is tracked in OSHA, the costs are moved into the position history. If an employee takes a training course, required or otherwise, the costs are moved into the position history. If the position is filled three times in two years, all recruiting costs are moved into the position history. Benefit costs (which can be different for different incumbents), salary costs, bonuses, and any other cost item that can be associated with a position are tracked in the position cost history. And yes, you can write lots of reports based on this detail. There are three Position Cost standard reports (YTD, Prior Year and Life) already created for you.

Activity Programs

Position Manager: A new Position Manager process has been added to the Activities menu of Position Control. The Position Manager allows HR to easily manage all facets of a position. You can edit a position, open a requisition, mine candidates, post positions, cancel postings, extend an offer, hire a candidate and close a requisition all from this one manager screen.

As with the other standard Manager activities available in all modules, this activity allows you to update records using a more process-oriented approach. These activities also provide non-HR users (such as managers if using Self-Service) a more user-friendly interface for updating records. In Module Setup, lookup and results fields as well as the tasks available are defined.

Candidate Manager: A new Candidate Manager process has been added to the Activities menu of Position Control. The Candidate Manager is a powerful and user-friendly process that lets HR (and management staff, if using Self-Service) to manage candidates for any position. You select the position for which you want to manage candidates and then you can mine candidates, returning those you want to pursue further. You can view each candidate's profile as well as see each step in the hiring process and take action. With a few clicks, you can schedule an appointment and be assured that both candidate and interviewer are immediately notified by email. When the interview is complete, the interviewer can return to the Candidate Manager and record the results of the interview. These results are then posted to the candidate history in both the Position Control and Applicant Management modules. Using this manager, you can also reject a candidate, extend an offer to a candidate and hire a candidate as well as attach and show the candidate's resume.

This tool is worth its weight in gold in the recruiting process. It ensures that the information gathered in the recruiting effort is stored and used to make certain that the highest-qualified candidates are identified. In addition, it also minimizes missed appointments and keeps candidate and organization appropriately informed.

Update Employees: A new Update Employees process has been added to the Activities menu of Position Control. This process allows you to synchronize the current position for employees with the latest information from the position.

Section 2.11 - Applicant Management

Personal Screen

The Contact Information frame has been standardized to be the same as in the Personnel Management module.

Attach Resume Button: Allows you to attach the applicant's resume, and the new Show Resume button allows you to show an attached resume. When hiring an applicant, the resume will transfer to the employee record and be viewed in the Employee Source sub screen of the Status screen.

Employer Contact: A new Employer Contact sub screen has been added to the Experience sub screen. This allows you to capture employer contact information for each job listed in the Experience grid.

Questions Screen

A Questions Screen has been added that allows you to setup and capture the responses for up to 10 separate questions. These questions are normally the type that show up toward the bottom of an application and are defined in Module Setup. Like screening questions for a job/position, you can define the question and up to five responses. You can assign points for the answer and optionally red-flag an applicant based on the response to that question. This is done using the new Applicant Questions table. Unlike screening questions for a job/position, these questions are not used to determine eligibility for a specific job or position, but can be used during the general application process to determine overall fit for the company and basic eligibility requirements.

Additionally, two essay fields allow you to capture up to two lengthy responses from the applicant. These are normally used on applications where the application contains questions such as "describe your work history" or "describe your long term goals and objectives". These are memo style fields in the database that allow for a nearly unlimited amount of text (true max of 2 GB). These fields can also be used for the attachment of a cover letter, which is becoming a common practice.

Positions Screen

Several enhancements have been made to this screen. You can now track multiple applications for the applicant. You can now view screening questions, requirements, and hiring process information for each application.

Search Button: Gives you access to the Open Position Search process. This allows you as an administrator to have access to the task that would be available to applicants when using the Self-Service option. You can search available positions and use the Apply button to run through the application process for an applicant. The application process will present any screening questions that have been defined for the position. If the applicant meets the minimum score from the screening questions, this process will optionally compare the details of the applicant's profile against the requirements for the position. If the requirements screening meets the minimum requirements for the position, the applicant will be posted as a candidate for the position. If the applicant does not meet the requirements of the position, the application is retained, but the applicant does not become a candidate for that specific position. Whether rejected or accepted as a candidate for a specific position, full detail is retained. The itemized results of the screening questions and the requirements are retained for future review on the Status screen. The search criteria fields used in this process is defined in Module Setup.

Notes

Section 3.1 – Custom Screens

Custom Screens have had substantial changes. The first key change is you can now optionally select a PDF form or JPG image to use as a background for the custom screen. This electronic form can then be used as a data entry form. Users (HR, Employees, Managers, or Applicants) can stop filling out the forms with pen and pencil and can now complete the same forms they are accustomed to completing using their PC. You can also easily create a new Form Template from an existing Custom Screen and vice versa.

Button: Used to place a button on the screen that executes a button trigger.

Heading 1: Used to place a heading on the screen with a colored background. In the default People-Trak style, this heading is in 14-point text with a background of the dark color associated with the selected color scheme.

Heading 2: Used to place a heading on the screen with a colored background. In the default People-Trak style, this heading is in 12-point text with a background of the dark color associated with the selected color scheme.

Heading 3: Used to place a heading on the screen with a transparent background. In the default People-Trak style, this heading is in 14-point text.

Heading 4: Used to place a heading on the screen with a transparent background. In the default People-Trak style, this heading is in 12-point text.

Frame: Used to place and name a frame around fields in order to group them on the screen. Field object rows that follow the Frame object row will be placed in the frame. You can also use this object to place grid fields on the custom screen as individual fields rather than in a grid.

Grid: Used to place a grid on the screen.

HTMLabel: Used to place formatted HTML label text on the screen in order to provide directions or added information. This object is edited with the HTML Editor.

Hyperlink: Used to place a hyperlink on the screen, which executes a button trigger.

Label: Used to place non-formatted label text on the screen in order to provide directions or added information. This object is edited with the Simple Editor.

Line: Used to place a line on the screen.

Picture: Used to place a picture on the screen. Can also execute a button trigger.

Screen: Used to place a button on the screen that will open another People-Trak screen or custom screen.

You can select these objects and order them as you wish. Then you can use the Preview option to display these objects in a special preview screen. In the preview screen, you can use the mouse, keystrokes and alignment tools to move or size the objects in any combination you desire.

You can mix these objects in a variety of ways. You can actually place four or five (or more) grids on a single screen. You can have captions, large blocks of text, lines and pictures so that your screens look like Web pages. You can include buttons that execute triggers of your own design. You can place buttons that execute other screens including those you have created. You can group fields within frames and expand and contract frames as you need.

For field objects, you can also modify captions. If you have more room, you can make captions longer and more meaningful. If you have less room, you can shorten captions to

increase density. For field objects, you can set the Display Only attribute or the Required attribute. When set on a custom screen, these attributes are effective on that screen only. So, you can have your own screens that require users to make changes and yet not have the requirement on other screens.

For grid objects, you can size columns, change captions, and set the number of rows you wish to see. As indicated, you can place multiple grids on a screen. The only limitation, and this is rather logical, is that any given grid must contain fields from the same table. In other words, you cannot create a grid that has fields from a benefits table and fields from a dependents table. You can however, make two grids, one with benefits and one with dependents and place them right next to each other to bring about the same effect. In order to help with knowing which fields are in a grid, version 9 has a nice feature where when you add a grid object, you enter the grid name and all of the fields in the specified grid are automatically loaded as field objects on that custom screen. You can then delete any fields you do not want in the grid, if any.

When you create a custom screen, you have a choice of several screen types. The screen type chosen then controls what screen sizing is available. The Maximum screen type allows you to use the maximum space allowed in People-Trak screens. The Standard screen type uses the standard People-Trak size screen and allows you to have variable height with scroll bars. The Popup screen type gives you the ability to size the screen to any size you desire. Even though you create a screen as a popup, it can still be used as a primary screen. If that screen is used as a primary screen, it will either be a portion of the primary screen if smaller or have scroll bars if larger.

You also have the ability to copy other custom screens. This allows you to make a copy of a custom screen that is similar to one you need to create and then modify the screen as necessary.

A Properties button allows you to access the Object Properties screen for the selected object. You can also access this screen by pressing F1 while on an object in Preview mode.

Custom screens can be simple one-screen workflows or they can be woven in multi-screen workflows using the Workflows features discussed later in this document.

The Custom Screens screen includes a Help button which allows you to customize the help for the current screen. This help text is also displayed on the Screen Help when using the Show Screen Help button for any custom screen.

The Custom Screens screen also includes a Category field used for security purposes. You can now easily secure a category and have all the items in that category (screens, fields, etc.) automatically secured as well. The category also specifies the notes category when entering notes for that screen.

Section 3.2 – Derived Fields

Derived Fields are a new feature that allows you to create fields from computations and calculations involving other fields. Using capabilities similar to those used in the Benefit Administration module for computing benefits, you can perform operations on existing fields to create other fields. For example, if your CFO needs to know the annual salary divided by 12, you can create a derived field that divides the annual salary by 12. You can then use this field in reports and letters. There are a wide variety of mathematical and character based operators that allow you to manipulate and concatenate fields. Derived fields are NOT stored in the database; they are derived when they are actually used.

Derived fields can be placed on custom screens where they have a display-only status. It is therefore possible to create and display various types of statistics. You can also use a derived field in the formula of another derived field. Derived fields are treated just like other fields and can be protected through field security in Security Setup - Module.

The Derived Fields screen also includes a Category field used for security purposes. You can now easily secure a category and have all the items in that category (screens, fields, etc.) automatically secured as well. The Category field is also used to display the derived field in its assigned category in the Select Field popup.

Date variables and several operators can be used in derived fields using the regular Formula field style. You also have the option of using the SQL Statement field style, which allows you to use any valid SQL statement to build the derived field. Once you have a formula entered, you can click the Test Field button to test the derived field using a specified record.

Section 3.3 – Workflows

All data entry is performed in a workflow. The standard workflow provided with the product is just one workflow. You can create as many workflows as you desire collecting any combination of screens. A workflow can contain a single screen or it can contain dozens of screens. You can make your workflows however you wish.

A workflow can contain standard screens (as supplied with the product) or custom screens. These can be mixed, if desired. The collection of screens in a workflow is listed in a grid. You can change screen order, add, or delete screens using the standard grid techniques. You can even change the name of the screen titles if you wish.

The default workflow is the one that is displayed when you use the File menu or Shortcut Bar. The default workflow for each module is specified for a user on the Default Workflows tab of the User Setup process. Other workflows are available on the Workflows menu, in the Categories pane of the Organizer desktop or as desktop tasks.

The Default Action field on a workflow allows you to specify the default action when opening the workflow, which can be either open an existing record or create a new record.

The Allow New Record option on a workflow allows you to create new records using the workflow.

Transaction history can be saved for a workflow by selecting the Save Transaction History check box on the Workflow Setup tab. Saving the transaction history for a workflow is like auditing all fields used on that workflow. If you choose to save transaction history for a workflow, that 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. Transaction history fields are also available for reporting in the Audit Reports process. If you choose to save transaction history for a workflow, you also have the option of adding a link to that history in the notes of the record being updated. Transaction history can be linked to the notes of a record by selecting the Link History to Notes check box, which is also on the Workflow Setup tab.

A document can be saved to the notes of the record being updated by the workflow by selecting the Save Document to Notes check box on the Workflow Setup tab. You need to then specify the document to save in the Document to Attach field as well as select what record group should be used for the document: current record, current group or use the document query to select the records to include.

Each workflow has a Category defined for security purposes. You can now easily secure a category and have all the items in that category (screens, fields, workflows, etc.) automatically secured as well.

Section 3.4 – Document Management

The Document Management module has been added to People-Trak and is included as part of the Strategic Toolkit option. This allows you to track and define documents that have been attached via the Archived Documents or Notes feature. Documents may also be created within this module independent of archive documents or notes.

With the addition of Document Management, there are additional fields that are captured when documents are archived and notes are saved.

Section 3.5 – Triggers

A new triggers feature enables users to define a variety of actions that are to be taken when different types of triggers are executed. A trigger is like an alarm going off. Even though the alarm goes off, you still need to have actions. Trigger actions are those actions that get taken when the alarm does go off. A field change trigger goes off (is executed) when a field is changed and the conditions are met. When the trigger is executed, you may choose to take an action such as sending a message, displaying a screen, running a report, or sending email.

Trigger Class

The Trigger Class can be User or Internal. All triggers created by you will have a class of User. Internal triggers are those used internally in People-Trak. You cannot change Internal triggers but you can make them inactive and/or copy them. A dropdown box on the Tool Bar allows you to choose which class you would like to edit or view.

Trigger Types

The following trigger types are available:

Alert Triggers: Alert triggers are based on a date within a record. When the condition associated with that date is met and/or a specific query condition is met (and the trigger has not already been executed on that date), the trigger is executed and actions are taken. Alert triggers are tested to see if their conditions are met when logging into People-Trak, switching between modules and executing NightRun.

Schedule Triggers: Schedule triggers are based on specific frequency (fixed or recurring). When the time condition is met (such as monthly on the 15th), the trigger is executed and actions are taken. Schedule triggers are tested to see if their conditions are met when logging into People-Trak, switching between modules and executing NightRun.

Button Triggers: Button triggers are executed by the click of a button. Unlike any other triggers, button triggers require no conditions to be met. You need only set the action and place the button on the screen of your choosing. For example, a button trigger can be used when you want to replace the Emergency screen on the Personal screen with a custom screen. You can make a button that will display your custom screen and insert it in place of the Emergency screen. Now whenever you click this button, the trigger will execute and display your custom screen. Button triggers can be used on Picture, Hyperlink and Button objects in custom screens.

If you have a button on a screen that performs an action that you would like to have fired off whenever that screen is displayed (recalculating totals on a screen, for example), you can select the Auto Execute option for that trigger.

Field Change Triggers: Field change triggers are executed when a specified field is changed. The trigger will go into effect the moment the edited field is left. Field change triggers allow you to regulate and keep track of the changes made to certain fields. For example, if you wanted to keep an eye on an employee's dependent count, you could set a field change trigger that would send you a message every time the Dependents field is changed in that employee's record. That way, you can keep track of that employee's dependents without having to check the employee record too often.

Record Save Triggers: Record save triggers are very similar to field change triggers. The chief difference is *when* the action is triggered. As opposed to field change triggers that are executed when a field is changed, record save triggers are executed when the user saves changes to a field. A record save trigger is useful when you want to make sure that a field change is permanent before doing any actions. For example, if you have a lot of trigger actions that you want to kick off when entering an employee termination date, it would be

extremely unwise to do that using a field change trigger. If you accidentally enter that date for the wrong person, the result could be extremely painful.

Trigger Actions

The following trigger actions are available:

Assign Task: Assigns a task to any user, including you. There are eight different types of tasks: activity, administration, create, document, edit, link, processing and table. Once the trigger takes effect, the selected task will be sent to the specified user's Inbox. From the Inbox, the user can execute that task, which will run an activity, launch an administrative action, create a new record, run a document, edit records, access a link , run a process, or maintain a table.

Disallow Entry: Displays a message on the user's screen when the trigger is executed and then disallows the entry. This can be used to prevent users from entering certain data.

Display Message: Displays a message on the user's screen when the trigger is executed. This can be an informative message or a reminder. The entry that executed the trigger is allowed.

Display Prompt: Displays a prompt with a specified message and then the question "Do you wish to continue?" If the user answers "Yes", the rest of the actions defined for the trigger will be executed. If the user answers "No", the rest of the actions defined for the trigger are skipped. This action can be used to allow the user to escape out of the sequence of actions about to occur.

Display Screen: Displays a specified screen. As soon as the trigger is executed, the screen will be displayed.

Execute Procedure: Executes code that is not included in standard People-Trak features. This code can be written by you or People-Trak, depending on the feature.

Execute Tool: Executes the specified People-Trak tool. This action is only applicable for button triggers.

Hyperlink: Executes a hyperlink to the specified URL. This action is only applicable for button triggers.

Insert Row: Inserts a row in a grid and is required before Update Field actions that require a new, blank row.

Run Document: Runs a document based on the group type selected and to the output destination specified when the trigger is executed.

Send Email: Sends an email to the specified recipients. You select from several different address types to which you can send that email. Approval triggers have several more address types available.

Send Message: Sends a message to the specified user's Inbox.

Set Alarm: Sets an alarm for yourself or another user for a specified date and time.

Update Derived: Updates any derived fields on the current screen. This action is useful when updating a component of a derived field and wanting to see the change take effect immediately when that derived field is on the same screen. For example, if a derived field uses the Annual Pay field in its formula and the Annual Pay changes, the derived field is updated as well.

Update Field: Updates a field with a new value, which can be from another field, a fixed value or from a derived field.

Trigger Type / Trigger Action Matrix

Trigger Action	Trigger Type					
	Alert	Button	Field Change Process	Field Change Validation	Record Save	Schedule
Assign Task	X	X	X		X	X
Disallow Entry				X		
Display Message		X	X			
Display Prompt		X	X			
Display Screen		X	X			
Execute Procedure	X	X	X	X	X	X
Execute Tool		X				
Hyperlink		X				
Insert Row	X	X	X			
Run Document	X	X	X		X	X
Send Email	X	X	X		X	X
Send Message	X	X	X		X	X
Set Alarm	X	X	X		X	X
Update Derived		X	X			
Update Field	X	X	X			

Section 4.1 - Self-Service Essentials

Self Service Employee/Manager

The Self-Service Employee/Manager option introduces Employee Self-Service (ESS), Manager Self-Service (MSS), and Ex-Employee Self Service (Ex-e) features. This enables employees and managers to view or edit information stored in People-Trak that is relevant to them. Self Service Employee/Manager includes the setup processes, activities, workflows, approvals and desktops necessary to implement the empowering of employees and managers.

Self Service Recruiting

The Self Service Recruiting option introduces Career Center (CC) features. This allows employees and visitors to apply for positions within your company. HR and management staff can then process those applications. Self Service Recruiting includes the setup processes necessary for applicant and visitor users.

Desktop Setup

The default desktop for a user type is specified in Desktop Setup. Both self service options add three new desktop options available to users within Desktop Setup: Home Page 1, Home Page 2 and Home Page 3.

Note: Only HR users have access to the Organizer desktop. When Self-Service Employee/Manager or Self Service Recruiting is implemented, the other user types will not have the Organizer option in this field.

Home Page 1

In the Home Page desktop, you do not see a list of modules. Instead, you see a list of user-specific tasks, grouped however you choose. In this desktop, there are no module boundaries. You can list tasks from any module in any order you wish. When you select the task, the underlying module switching is handled for you. All you need to do is point and click. The Home Page 1 desktop also displays Links, Tips, Events, Bulletins and RSS Feeds.

Home Page 2

The Home Page - Simple desktop is module independent and simply has a list of tasks that can be in any module. When a task is selected, People-Trak automatically switches to the correct module and executes the task. This is all transparent to the user. The list of tasks is defined for the user on the Desktop Tasks tab of Desktop Setup.

On Home Page 2, the Tasks pane is displayed on the left and includes the list of tasks. There is a display area located to the right of the list of tasks that can be customized using various objects such as HTMLLabels, images and hyperlinks to name a few. This is done within Desktop Setup.

Home Page 3

The Home Page - Simple desktop is module independent and simply has a list of tasks that can be in any module. When a task is selected, People-Trak automatically switches to the correct module and executes the task. This is all transparent to the user. The list of tasks is defined for the user on the Desktop Tasks tab of Desktop Setup.

On Home Page 3, a Tasks bar is displayed across the top of the page with buttons for each of the tasks, and there is a maximum of eight tasks that can be shown and no groupings are available. There is a display area located below the list of tasks that can be customized using

various objects such as HTMLabels, images and hyperlinks to name a few. This is done within Desktop Setup.

User and Security Setup

Each employee/manager/applicant will be assigned a separate People-Trak login as well as an ESS/MSS/Ex-e/CC User. The ESS/MSS/Ex-e/CC User specifies what he can see and do in People-Trak and allows employees/managers/applicants who need similar access to People-Trak to be grouped together. For example, you can have regular employees/managers assigned to one ESS/MSS User ID and executive employees/managers assigned to another ESS/MSS User ID. This eliminates the need for each employee/manager to have his own user defined in User Setup. Only the ESS/MSS/Ex-e User is defined in User Setup and then is assigned to an employee/manager using Self-Service User Setup. You can define as many ESS and MSS Users as necessary, based on the different accesses required to People-Trak. The same capability is available for Ex-e and CC users, if necessary.

An ESS or Ex-e User will only have access to his own employee information and an MSS User will typically have access to his department's information. People-Trak is shipped with a standard ESS User, MSS User, and Ex-e User. In most cases, you would set up the ESS User to have a default of Employee ID =My Employee ID for the query on the Record tab of Security Setup - Module, and the MSS User to have a default of Department =My Department. You might need to have some of your MSS Users have broader access, such as to the company or division. You would just create other MSS users and change the =My statement. When assigning tasks to an ESS user, you do have the option on documents to use the query of the document rather than the standard =My logic that only shows that employee's information.

A CC User will only have access to his own applicant information. For the query on the Record tab of Security Setup - Module, the CC User is defaulted to Applicant ID = My Applicant ID in a similar way to how employees are handled. People-Trak is shipped with a standard CC User and default VISITOR user. There is only one VISITOR user, which is used to assign the access required for all visitors. Once an employee or visitor has applied for a position, he is automatically assigned an applicant ID and People-Trak login as well as a standard CC User. The CC User specifies what an applicant can see and do in People-Trak and allows applicants who need similar access to People-Trak to be grouped together. Initially, a new applicant is assigned a standard CC User. The administrator can change the applicant's CC User at a later time depending on the access required. Having applicants share a CC User eliminates the need for each applicant to have his own user defined in User Setup. Only the CC User is defined in User Setup and then is assigned to an applicant using Self-Service User Setup. You can define as many CC Users as necessary, based on the different accesses required to People-Trak. Security is assigned for each CC User like any other user, with the Security Setup processes.

Workflows

The Self Service Employee/ Manager and Self Service Recruiting options include several workflows in addition to the standard workflows. The Workflows process allows you to update the settings for each of those workflows in addition to the regular standard workflows.

Each workflow can have an optional approval attached. Whenever a change is made to a record when using the workflow, the change must be approved based on the requirements of the attached approval. On the Approval tab, you enter the name of the approval you want to attach to the workflow. You then specify an HR coordinator for the workflow. This person is notified if there are unresolved approvers as well as when the stall notification interval has passed. You can allow concurrent transactions when using that workflow. If you allow concurrent transactions, you can make multiple changes to different fields in a record and they would all be queued up with separate approvals. You can also set up notification

intervals, stall notification intervals, and proxy forward intervals. If the proxy forward interval on the workflow is exceeded and a proxy (another employee) has been assigned to the current owner of the approval, the approval is forwarded to the proxy.

If suspense of transactions is allowed, you can specify the interval of time to wait (in hours) before the suspended transaction is discarded. If a transaction has been suspended for that amount of time with no activity, the transaction is discarded as if it was never made. This keeps records from being suspended indefinitely.

Each workflow can also have its own digital signature. If the "Require Signature check box is selected for a workflow, this is the statement that must be agreed to in order for a change to be posted to a record using that workflow. The "Require Signature" check box and the Signature Text are specified on the Approval tab.

Workflows launched by non-HR users are not anchored and do not include shortcuts; whereas, workflows launched by HR users are always anchored with shortcuts.

You can specify that transaction history be saved for a workflow. If an approval was attached to that transaction, the approval history is saved as well. On the Administration menu, you can then view that history using the Audit/Transaction History option or report on it using the Audit Reports option, which includes the approval information along with the transaction details. You can also view approval history in a record by using the Show Transaction History button.

Self-Service User Setup

After the Self-Service users (ESS, MSS, Ex-e, CC, VISITOR, etc.) have been created or updated in User Setup, the Self-Service User Setup process is used to generate logins for all employees and managers as well as assign them to one of the Self-Service users based on the access required for each person. This information is also accessible to Administrators from within the employee's record on the Record Status screen's Self-Service tab. With this process, you can also send emails to the users to notify them of their login information.

As mentioned above, each applicant is automatically assigned an applicant ID and People-Trak login as well as a standard CC User. The Self-Service User Setup process is used to change the CC User for an applicant based on the access required. The login information can also be changed using this process. This information is also accessible to Administrators from within the applicant's record on the Record Status screen's Self Service tab.

Corporate Communication

A new Corporate Communication process has been added to the Activities menu of the Personnel Management module as part of the Self-Service Employee/ Manager option. This process allows you to distribute a document to a specified employee or group of employees. It also allows you to capture whether the recipient acknowledged that he read the document.

The corporate communication is sent to each recipient's Inbox in People-Trak, and an email is sent to the recipient's email address letting him know of the item awaiting his perusal in People-Trak. When the recipient opens the Inbox item in People-Trak, he can then view the document associated with the corporate communication. He then has the ability to confirm that he has read the document.

Corporate communication history is stored in each employee's record and is accessible using the Communication button on the Personal screen when accessing an employee record. The Corporate Communication screen displays the Sent Date and Read Date for each communication sent to that employee.

This process uses standard Message and Attachments tabs to specify the contents and attachments for the email being sent.

Suggestion Box

There is a new Suggestion Box feature, as part of the Self-Service Employee/ Manager option, which enables any user to submit suggestions from within People-Trak (either in the browser or in regular People-Trak.) The user can optionally include a name, but this is not required. The user can also attach a document that further describes the suggestion.

For the HR department, there is a corresponding Suggestion Box Manager that allows HR users to view (including attachments), print, and delete suggestions.

Policy Manual

You can now access company policy manuals from within People-Trak as part of the Self-Service Employee/ Manager option. You simply need to create a PDF file of the policy manual document for each company and attach that PDF file to the company in Company Setup. You can then access the current company's policy manual PDF file by selecting the Policy Manual activity on the Activities menu of the Organizer desktop or by selecting that task on any of the desktops. There is no longer any reason to update manual pages and print and distribute. With ESS and People-Trak, you just update the text, create the PDF file and notify all employees with a simple group-wide email.

Timeoff Request

A Timeoff Request activity in the Personnel Management module is included as part of the Attendance and Self-Service Employee/ Manager options. This allows employees to enter time-off requests. On the Self-Service tab of Module Setup, you have a choice as to what time-off request form you would like to use (Level 1 is simplest to Level 3, which is most complex) as well as specify what workflow is required for the request. On the Level 3 form, the Update button will spread the hours across the days for you, depending on the new Work Days schedule for that employee's position.

Section 4.2 - Approvals

A complete workflow is composed not only of screens, but also of approval criteria, if desired. With approvals, changes to records are not posted directly. They are posted only after all specified approvals have been made. When an approval is attached to a workflow, any changes made within that workflow must be approved by the specified approvers. Each approver type is resolved to an actual person when that approver becomes the current owner of the approval. The current owner is notified via email that there is a pending approval in his or her Inbox. The current owner can click on that Inbox approval item and a transaction approval screen is displayed, which contains either a detailed form showing the changes and the status of all approvers or the transaction in the context of the workflow itself (detail or context option selected per workflow). He can approve or reject the transaction and add a comment, if desired. After all designated approvers have approved the transaction; it is posted to the database.

If an approver wants to reject a transaction, he has the option of rejecting the transaction completely (which deletes the transaction as if it never happened) or rejecting the transaction and returning it to the initiator (which starts the whole approval process over as if it was just initiated). If the reject and return option is used, the initiator is informed of why the transaction was returned, and he can then make changes as necessary and resubmit the changes for approval.

If approvals are active for a workflow, you have the option of allowing suspense of transactions made using that workflow (if concurrent transactions not allowed), before they are formally submitted for approval. This is particularly useful for transactions that require more time to get all information entered before final submission for approval (i.e. entering requisitions). When suspense is allowed for a workflow, upon leaving a record with changes in progress, the user is asked if he wants to suspend the transaction or submit it. If the transaction is suspended, only the user that suspended the transaction can later update that record. That user can go in and out of the suspended record as often as necessary to make updates. When the transaction is finally submitted, it flows into the normal approval process.

Approvals

The Approvals option on the Tools menu includes four approvals: HR Only, Supervisor and HR, Supervisor Only, and Supervisor Plus. You can modify those as well as create your own custom approvals. There are four types of approvers:

- Employee
- HR User
- Org Chart (Personnel Management module only)
- Position

Employee Approver: This is an approver that resolves to a specific employee. It could be a manager or non-manager. Once you select this type of approver, you select from the current list of employees.

HR User Approver: This is an approver that resolves to an HR user of People-Trak. Once you select this type of approver, you select from the current list of HR users.

Org Chart Approver: This is an approver that resolves to a position within the organization, but not by position number. With an Org Chart approver, you indicate if the approver is the initiating supervisor, supervisor's supervisor, or supervisor's supervisor's supervisor.

You can specify more than one Org Chart approver so that the upward chain of command receives the approval one after another. Such an approver list would look like the one below.

- Org Chart Supervisor
- Org Chart Supervisor + 1
- Org Chart Supervisor + 2

In this scenario, the approvals are passed from the employee through three levels of management. As each approval is reached, the specific person is determined and the approval is appropriately forwarded. This type of approval is very important because workflow structures need to be generic. You cannot create a unique workflow for each and every employee. So, the Org Chart approver type can be used to determine the appropriate chain of command for the particular employee for whom the change has been submitted.

Position Approver: This is an approver that resolves to a specific position within the organization. Unlike the Org Chart approver, where we do not know the specific position, this type of approver is an existing, named position within the company. When this approver becomes the current owner, the current incumbent for that position is derived and the approval is forwarded to that person.

Powerful Combinations: All of the approver types can be mixed in any combination. You may need to start with org chart approvers to obtain the first chain of command. You may then need to specify a specific position if that is required such as the CFO or CEO. Finally, you can finish with a specific HR user who must review the submission before final posting.

Trigger Based: The Approvals process is trigger-based, which allows you greater flexibility and customization. Each approval can have a unique trigger that is executed when the transaction is initiated. In addition, you may define two unique triggers for each approver, one if the transaction is approved and one if the transaction is rejected. Each trigger can perform the standard trigger actions of assigning a task, executing a procedure, running a document, and sending an alarm, email or message. The Send Email trigger action now allows you to specify both next and prior approvers, so the trigger can be used to forward the email to the next approver or to notify the prior approver of any desired action. You also have the ability to send an email to the initiator of the approval and the HR Coordinator. The standard actions of the approval trigger include options for emailing all prior approvers, anyone in an email list as well as other options. People-Trak is shipped with standard approval triggers, which can then be replaced with custom approval triggers as needed. Approval triggers can be updated or created using the Approval Triggers option on the Tools menu.

Attach Approval Action: Field change triggers have an additional action available when the Self-Service option is implemented: Attach Approval. This action attaches an approval to the transaction, overriding any existing approval tied to that workflow. This requires that the necessary approvals are given in order for the changes to be posted to the database. For example, if a pay raise is entered that is over a certain percentage, an approval may be required.

Transaction Manager: This process on the Tools menu is used to manage pending transactions for the current module. A transaction can be pending because it is waiting for approval, it is behind transactions awaiting approval or it has been interrupted for some reason. The Transaction Manager process displays a list of all pending transactions and allows you to browse the transactions to review them or delete them. On approval transactions, you can also proxy approve for an approver, delete an approver or change an approver.

Section 4.3 - Appraisals

Version 9 provides a complete performance management capability. This enables you to define review criteria for each position and objectives for each employee. This criterion is used in an online review process that captures and analyzes the data.

You can specify up to eight different appraisers for each review. This is normally a manager, the employee, and up to six peers. You can also use the feature for just managerial reviews, if you choose. You can specify an unlimited number of review criteria and unlimited number of objectives and tasks for the review period.

A batch initiation tool allows you to initiate reviews for the entire company with just a few clicks. During the initiation process, all stated reviewers are notified that they have pending reviews. The reviewers need only use the Appraisal Manager activity to see the pending reviews and to select a review to complete.

All of the results are stored on a comprehensive screen that allows you to peruse review detail with simple clicks of the mouse. Of course, you can create a wide variety of reports and forms as necessary.

Module Setup: The Appraisals tab is used to define the tasks to show on the Appraisal Manager. The appraisal lookup fields use those of the Employee Manager and results fields are hardcoded.

Performance Appraisals Screen: There is a detail screen that tracks all of the review detail for each of up to eight separate reviewers per review. The detail includes the ratings provided for each review item and for each objective/task. There is also a large text field showing the free-form overall review provided by each reviewer.

You can add a list of objectives and tasks that the employee is to accomplish during the review period. With a new hire, this is normally keyed into the new Objectives screen. For subsequent reviews, the objectives are keyed in the review and automatically posted to this screen.

Finally, there is a detailed results screen for each review. This shows the numeric ratings for all review items for all reviewers and includes weightings and other factors.

Initiate Appraisal

The Initiate Appraisal process is available in the Appraisal Manager screen.

AppraisalTables and Related Changes

Appraisal Type Table: This table that allows you to define specific appraisals for each appraisal type. You may optionally include job duties from the Job table or Position Control module and assign the job duties a percentage of the overall appraisal.

The Appraisal Type table also allows you to define a unique output document, approval, substitute workflow, and other details for each appraisal. The appraisal type contains a list of appraisal items that constitute the appraisal itself. The appraisal type can indicate if job duties for the position are to be automatically included in the appraisal when it is initiated. The job duties can be sourced from either the Job table or the Position Control module. When job duties are defined in the Job table or Position Control modules, these can be flagged as items that should be included if requested. So, trivial duties can be left off, if desired.

Appraisal Item Table: This table that allows you to define specific appraisal items, which can the be assigned to an appraisal type in the Appraisal Type table. Each item can be one of three different types: Rating Only, Rating and Comment, or Comment Only. The Appraisal Wizard responds to each type differently and displays the appropriate fields as necessary.

Comment Only items are normally associated with the type of appraisals where the item is labeled "Describe….".

The Appraisal Item table supports Auto Commenting. Each item can specify a meaningful description for each rating level for the item. If you are using a typical five level system (exceeds, often exceeds, meets, sometimes meets, seldom meets… expectations), you can enter a paragraph or two to describe what the performance looks like for each level. If the item is a Rating and Comment type, the comment is automatically displayed when the rating is used. The appraiser can quickly learn about the ratings and correct ratings by simply reading the detailed comment. The comment is not the same for each item because above expectation performance for attendance is not the same as above expectation performance for a specific job duty.

The Job Duties defined in Job table and Position Control module become appraisal items based on the selection that determines if and where job duties should be taken. The Job Duties table has the same features as the Appraisal Item table in regard to auto comment and auto objectives.

When the Job Duties screen is completed in the Job table or Position Control module, the percentage for each duty can be specified and a total is maintained. The total should always sum to 100%. When the Job Duties percentage is specified in the Appraisal Type table, the percentage is that portion of the overall appraisal that is specified for Job Duties. The 100% of the job duties is then divided by this number. For example, if Job Duties are to be 33% of the overall review and the duties within the list total 100% (as is correct), each job duty is actually worth 33/100 of the total specified.

Appraisal Criteria Table: A new Appraisal Criteria table has been added. This replaces the Performance Criteria grid in the Module Setup process for Personnel Management. This point value is then assigned in the Auto Comment tab of the Appraisal Item table.

Job Duty Table: Each job duty can now have Auto Comments used in the appraisal process.

Appraisal Items

The Duties screen in the Job table and Position Control module now has an Appraisal Item check box to specify which duties should be included as appraisal items based on the Appraisal Type table setting.

Section 4.4 – Self Service Open Enrollment

The Self Service Open Enrollment option adds both a Benefit Open Enrollment and Benefit Current Enrollment wizard activity to the Personnel Management module. Benefits Open Enrollment allows an employee or a user acting as the employee (HR) to perform open enrollment and concurrently maintain future plans to both the employee record and the Benefit Administration module. A simpler version of the Benefits screen is displayed for the employee. The employee can then choose to decline overall coverage, decline coverage on a specific program or select a plan for a given program. When selecting a plan, the employee is given information that allows him to easily compare plans. Once a plan is selected, the employee can enroll dependents.

Notes