What's New in Documents and Reporting

Version 9.0

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Contents

Changes to Reporting

Query Operators

=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 operators 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

These 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.

Report Definitions

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.

Field and Row Modifiers

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. If you try to select a field modifier for other field types, a message will appear stating that there are no valid modifiers.

Modifier	Description	Sample Output
M	Numeric month	1 to 12
D	Numeric day of the month	1 to 31
Y	Numeric year	2008
WD	Word day of the week	Monday, Tuesday, etc.
WM	Word month	December
WMD	Word month and day	December 31
WMDY	Word month, day and year	December 31, 2008
W$	Word currency	Twenty three and 0/100 Dollars

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 of rows)

This new modifier is used to specify that a range of rows is to be included. The range is formed from a "from value" and "to value" separated by a colon. For example, if you wish to print the pay rate from rows 2 through 5, use the field name and range modifiers as shown below.

Pay Rate   2:5

There are no limits to the range you can enter. If you specify an upper value that exceeds the number of rows, only the number of actual rows is returned. If the starting value is above the number of rows, no rows are returned. If you enter the range in reverse order (larger number first), the range will corrected when you leave the field.

Sorting and Calculations

Email

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

This calculation type is used to calculate the percentage of the count of the number of records within a break. For example, if you do a percent count calculation on the Full Name field that is broken by the Department Code field, the report will list the percent of the total count for each department.

Percent Total

This calculation type is used to calculate the percentage of the total (sum) of the numeric values within a break. For example, if you do a percent total calculation on the Pay Rate field that is broken by the Department Code field, the report will list the percent of the total salary burden for each department.

Notes

Changes to Documents and Reports

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. The archived document is stored in the database.

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.

The Cluster Report option uses a two-tab screen. The Specification tab is used to record the name of the cluster and the categories for the cluster. The Documents tab is used to define the documents to include in the Cluster Report.

Email

An Email option has been added to the Documents menu to allow you to define an email specification much like a document specification. This option allows you to create and send an email without having to be in a record group.

When you create a new or open an existing email specification, the Email screen is displayed, which uses four tabs. The Specification tab is used to define basic information about the email as well as specify the recipients. The Query tab contains the standard query grid to determine for whom the email specification is going to be sent. The Message tab is used to specify the message portion of the email. The Attachments tab is used to define what attachments to include in the email.

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.

The Freeform Reports option uses a three-tab screen. The Specification tab is similar to the Adhoc Report screen and is used to define basic information about the document. The SQL

Statement tab contains a single text box for entering the SQL statement. The Report Captions tab contains a grid for entering captions and formatting formulas.

Updated Document Properties

Email Tab

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.

The Encrypt on Send checkbox allows you to specify whether or not you want to encrypt the document when sending it via email. Encryption is recommended for a document with sensitive information on it. If this check box 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.

Note: The Email tab is not available for an Export or Lookup Favorite document as there is no document actually produced.

Spanning Tab

The Spanning tab is used to activate company spanning. Documents are normally produced using a query that selects records from the current company. With company spanning, you can cause any document to select records from a collection of companies, not just the current company. For example, if you wish to run a report that includes records from both the active and the archive databases, you can specify these databases with the company spanning feature. Whenever this document is run, it will collect applicable records from both companies.

Company spanning is not used by default. In other words, if you do not specify company spanning, the current company is used.

In Freeform reports, spanning is done by default so no Spanning tab is available.

Note: Spanning is only available to Administrators for security purposes, so when non-administrators run a document that spans, they will only see information for the current company and based on their given security.

Cover Sheet Tab

The Cover Sheet tab is used to specify the Cover Sheet template to use, if you choose, for your documents. If a cover sheet has been selected for a document, the cover sheet is automatically pre-pended to that document as a single page document when the document is ran. When the properties page is displayed for a document type that does not support cover sheets (Export and Lookup Favorites) the Cover Sheet tab is not displayed. In the case of cluster reports, you can specify a cover sheet for the whole cluster, and if any reports included in the cluster have a cover sheet, their cover sheets will be printed in their respective places.

Annotations Tab

The Annotations tab is used to specify a customized header and/or footer notation to be placed on a document. If the properties page is displayed for a document type that does not support headers and footers, the Annotations tab is not displayed.

In addition to designating the desired header and footer for the document, there are checkboxes to specify whether the header and footer are repeated on each page or are on the first page only.

Note: If a cover sheet is part of the document, annotations will show up on the actual document, not the cover sheet.

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

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.

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.

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

System Templates

This process on the Administration menu allows Administrators to create templates that use system fields, which can then be used across all modules. There are four types of templates as described in the sections below. An unlimited number of each of the four template types can be defined by the user.

Cover Sheet

Cover Sheet templates 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. When the Cover Sheet Template Editor opens, you are given the space for a full page and you can format as desired. You can include tables and pictures as well. Cover Sheets are assigned to a document under the Cover Sheet tab in Document Properties.

Note: Cluster Reports are reports that are composed of a "cluster" of other reports. When the cluster is run, each report is run individually and then merged into a single final document. You can specify a cover sheet for the entire cluster and it will be at the front of the first document. However, if you have specified cover sheets for any of the individual documents in the cluster, these will also be included in their respective places.

Email Closing

Email Closing templates can be used when sending emails from within People-Trak. The Send Email screens used throughout People-Trak allows you to specify either a template (fully formatted as desired) or enter a basic block of text. Email Closing templates can only use text fields, so image fields such as logo and signature cannot be used. If you want to have more elaborate emails using those fields, use the Email Template feature on the Templates menu and assign an email template to an email rather than using the simple block of text closing. Email Closings are assigned in User Setup.

Note: The Email Closing Template will always use fields related to the current user, even if the sender specified in the From field is different. If a user wants a more fully formatted or specific email, they can use an email template instead which supports the full spectrum of HTML formatting capabilities.

Header and Footer

A number of the People-Trak document types (Adhoc Reports, Freeform Reports, Standard Reports, etc.) utilize a header and footer. The header currently includes the logo and three fields regarding the document itself: company name, document title and document comment. You are also able to specify where these two blocks are positioned. The Header Note can be placed in the third unused space. The Footer Note will always be placed in the center area. Headers and Footers are assigned to a document under the Annotations tab in Document Properties.

The main System 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.

System Template Editor

Use the Edit Template option on the File menu or the Edit Template button on the Tool Bar to access the System Template Editor, which uses the standard Text Editor interface.

Within the editor, there is a change in the ability to select mail merge fields. In these four template types, only the system merge fields can be used. These include many fields from the company and current user, but would not include anything from employee record, applicant

record, etc because these are not relevant. Other than Email Closing template, it is possible to specify the field that represents the user signature and company logo. The user signature (and other user fields) would be taken from the User Table for regular HR users in People-Trak and would be taken from the Employee table for ESS users

Lesson 1
Working with Documents

Lesson Contents

This lesson covers how to use the Explorer when working with documents. The Explorer organizes all of your documents into categories in the same way that the Windows Explorer organizes files into folders.

Tutorials

Retrieve and Print a Document: shows two methods for retrieving and printing documents.

Create a Document: demonstrates how to start the creation of a document using the Explorer. The document is completed using the appropriate document editor.

Delete a Document: shows how to delete any obsolete document.

Copy a Document: demonstrates how to make a copy of a document.

Working with Categories: shows how to change categories for a single document and for all documents. It also shows how to merge the documents from one category into another.

Tutorial 1.1 – Retrieve and Print a Document

People-Trak provides a large number of pre-defined reports that you can use. In this tutorial, you will learn how to select and print a document.

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

    The Select Product Option screen is displayed.

2. The **Position Control** and **Attendance** options should be the only options that are toggled on. If not select the **Training** button to select them.

3. Click **OK**

    The Login screen is displayed.

4. In the **User ID** field, enter **DEMO.**

5. In the **Password** field, enter **DEMO**.

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

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

    The Explorer is opened and all of the existing adhoc reports are organized by explorer category. The explorer category is assigned when a document is created and can be changed if necessary. We'll use the explorer categories to help us find a report.

7. Select the **Compensation** category to display a list of the compensation documents.

8. Highlight **Salary History by Employee** in the list but do not open it.

    At this point, you can open the document to run it or you can run it directly from the Explorer. As usual, we will try both.

9. On the **File** menu, select **Open Adhoc Report** or on the Tool Bar, click the **Open Adhoc Report** button to open the **Salary History by Employee** document.

    The document opens and the Adhoc Reports screen displays. This screen is used to create, edit, and run documents.

    Note: You are also able to open documents by double-clicking on the document name if the Run on Double-Click option is not turned on for the user in User Setup.

10. We do not need to change the document, so click the **Run Adhoc Report** button on the Tool Bar to run the document.

    The document displays in the Document Viewer.

    Note: Whenever you see the Run/Edit button on any Tool Bar, you can perform that function by pressing the F5 key.

11. Close the **Document Viewer** and close the **Adhoc Reports** screen.

12. This time, run the document directly from the **Explorer** by clicking the **Run Adhoc Report** button on the Tool Bar.

    The document is sent to the Document Viewer as before.

13. Close the **Document Viewer**.

14. Select the **General** category and run the **Employee List by Department** report.

    As you can see, to run existing reports you need only point and click.

15. Close the **Document Viewer** and the **Explorer**.

    Let's look at another type of document, the Letter.

16. On the **Documents** menu, select **Letters**.

    The Explorer is opened and all of the existing letters are organized by explorer category.

17. Select the **Physical Letter** and run it.

    A physical letter for each record in the company is generated and sent to the Document Viewer.

18. Close the **Document Viewer** and the **Explorer**.

19. On the **Documents** menu, select **Standard Reports.**

20. Select the **Workforce** category.

21. Select the **Workforce Distribution by Ethnicity** report and run it.

    This report is a colorful graph that illustrates the number of employees within each ethnic category. Notice that at the bottom of the screen, the legend is displayed. This legend contains the numbers and percentages represented by the graph.

22. Close the **Document Viewer** and the **Explorer**.

    There are many, many documents that you can run. Some may be helpful and some may not. Using the navigation features you have learned, you can find these documents and test print them in order to determine which are the most useful to you.

23. Continue with the next tutorial.

Tutorial 1.2 – Create a Document

The Explorer is the starting point for creating new documents. Fully creating new documents is the subject of multiple future lessons. In this tutorial, we will show you how to get started.

1. On the **Documents** menu, select **Letters**.

   The Explorer is opened and all of the existing letters are organized by explorer category.

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

   The Letters screen is displayed. A new letter has been created in the <Blank Category> category and should have a name of NEW-1. If NEW-1 had already existed, this value would be NEW-2 and so on.

   Note: The Letters screen is used to specify the document name, categories, letter template, sort order, and query equations for the letter. Completing all of these fields is outside the scope of this lesson. We will complete just enough fields to continue.

3. In the **Document Name** field, enter **My Letter**.

   The next field is the Explorer Category, which is the category that this document will be in when in the Explorer. You can create an unlimited number of explorer categories.

4. In the **Explorer Category** field, enter **My Category**. When asked if you want to override the table, click **Yes**.

   The next field is Category, which is the category that is used throughout People-Trak to secure items as well as specify where the item should be shown in the Categories pane of the Organizer desktop. When you create a document, this is defaulted to User but can be changed to any pre-defined category.

5. We will leave the **Category** set to **User**.

6. In the **Letter Name** field, use the popup button to select **Physical Letter**.

7. On the Tool Bar, click the **Run Letter** button to show that you have created a valid letter document. Close the **Document Viewer**.

   The changes you made are no longer in the modified color. This is because all documents are saved first and then run.

8. Close the **Letters** screen.

   The Explorer is displayed. The new category, My Category, is highlighted on the left and your new document, My Letter, is highlighted on the right.

9. Run the **My Letter** document directly from the **Explorer.**

   The letters will be generated as before. Once created, a new letter document is just like any other document.

10. Close the **Document Viewer** and continue with the next tutorial.

Tutorial 1.3 – Delete a Document

This tutorial demonstrates a simple function that you probably won't need for some time. However, after an extended period of time when you have created dozens and dozens of documents, you may decide to delete some. To show you how to do this, we are going to delete the letter document created in the last tutorial.

1. The **My Letter** document should still be highlighted.

2. On the **File** menu, select **Delete Letter** or on the Tool Bar, click the **Delete Letter** button to delete the document.

   The following message is displayed:

   Delete the Letter specification highlighted and listed below?

   My Letter

3. Click **Yes** to delete the document.

   Because there was just one document in the category, the category is also deleted. This only happens when the last document in a category is deleted.

4. Close the **Explorer**.

5. Continue with the next tutorial.

Tutorial 1.4 – Copy a Document

There are times when it is useful to make a copy of an existing document. For example, if you have a document that you wish to use as a model for a similar document, you can copy the document and then modify the copy. In addition, if you wish to make a document common, but keep a copy of your own, you can copy the document and make the copy common. Use the following procedure to copy a document.

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

2. In the **General** category, highlight the **Alphabetic Employee List** document.

3. On the **File** menu, select **Copy Adhoc Report** to place a copy of the document in memory.

    A copy of the document is placed in the list. It is titled Alphabetic Employee List-1. This copy of the Alphabetic Employee List document is completely distinct and can be modified or deleted without affecting the original document.

4. To prove this, delete this "-1" document using what you learned in the last tutorial.

5. Close the **Explorer**.

6. Continue with the next tutorial.

Tutorial 1.5 – Working with Categories

Categories are normally assigned when a document is created. To change a category after a document has been created, select the document for editing, change the category field, and then save the document. Try it now.

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

2. In the **General** category, open the **Home Phone List** document.

3. Change the **Explorer Category** to **Education**.

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

   The Home Phone List document is moved from the General category to the Education category.

   You can change the category to an entirely new category if you wish. Try that now.

5. In the **Education** category, open the **Home Phone List** document again.

6. Change the **Explorer Category** to **My Category**, overriding the table. Close the **Adhoc Reports** screen, saving your change.

   A new category is created and the Home Phone List is placed in it.

   You can change the category for all documents in a category using the Explorer. Here's how.

7. Highlight the **General** category.

8. On the **File** menu, select **Rename Category**.

   The Rename Category screen is displayed.

9. In the **New Category** field, enter **New Category** and click **Rename**.

   The change takes place immediately and all related documents are permanently changed. There is no General category any longer.

   You can merge one category with another category as well. Try this technique.

10. Change the **Education** category to **New Category** using what you just learned.

    Because the category already exists, the following message is displayed:

    This category has already been used. Do you wish to combine categories?

11. Click **Yes** to merge the categories.

    The documents from Education are merged with the documents from New Category. The Education category is now gone.

    Now that we are done playing with categories, let's get the documents back where they belong.

12. In the **New Category** category, open the **Educational History by Employee** document. Change the **Explorer Category** back to **Education**. Close the **Adhoc Reports** screen, saving your change.

13. In the **My Category** category, open the **Home Phone List** document. Change the **Explorer Category** back to **General**. Close the **Adhoc Reports** screen, saving your change.

14. In the **Explorer**, change **New Category** back to **General**.

15. Close the **Explorer**.

16. This concludes this tutorial and lesson.

Lesson 2
Using the Document Viewer

Lesson Contents

All documents produced by People-Trak are sent to the Document Viewer. The Document Viewer is used to preview documents and to output documents not only to the printer, but also to a variety of other destinations.

Some of the features in the Document Viewer will only work if you have the appropriate product installed. For example, columnar-style reports can be exported directly into Microsoft Excel (or to a similar product associated with the XLS extension). If you do not have Excel or an equivalent product installed, this feature will not work.

This lesson covers how to use the Document Viewer.

Tutorials

Navigating a Document: shows how to use the navigation features to move through the pages of a document.

Viewing, Zooming and Scrolling: demonstrates some techniques for changing the viewing attributes of a document.

Output Options: shows how to output documents to destinations other than just the printer.

Tutorial 2.1 – Navigating a Document

Most documents that you print will be more than one page in length. When a document is longer than one page, you need to know how to navigate through the pages. That's the purpose of this tutorial.

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

   The Explorer screen for adhoc reports is displayed.

2. In the **Compensation** category, select the **Salary History by Employee** report and run it.

   A multi-page report is created.

   There are four blue navigation buttons on the Tool Bar. The outer buttons are used to jump to the first and last pages respectively.

3. Click these outer buttons now.

   The page counter and the document contents indicate the page you are on. The HOME and END keys can also be used to perform the First Page and Last Page functions.

   The inner buttons are used to jump to the previous and next pages respectively. If you are on the last page and click the Next button, you will cycle around to the first page. If you are on the first page and click the Previous button, you will cycle around to the last page.

4. Click these inner buttons now.

   The PAGE UP and PAGE DOWN keys can also be used to perform the Previous Page and Next Page functions when viewing a whole page. When a partial page is displayed like you have right now, these keys will scroll up/down a third of the current page. You can try this if you like.

5. Close the **Document Viewer** and the **Explorer**.

   The Document Viewer is a little different when letters and forms are displayed.

6. On the **Documents** menu, select **Letters**.

7. Select **Physical Letter** and run the letters.

   One single-page letter should be generated for each employee. You can see by the text between the navigation buttons on the Tool Bar that page 1 of 32 is currently displayed. This is the total number of pages in the document, one for each employee. If there had been two pages per employee, the counter would say 1 of 64.

   Note that there is an additional toolbar now displayed. This is the Record Navigation Bar. It is used to move through the individual letters for each employee. There are four navigation buttons. The outer buttons are used to jump to the first and last records.

8. Click these outer buttons now.

   The record counter and the record dropdown indicate which record you are viewing.

   The inner buttons are used to jump to the previous and next records respectively.

9. Click these inner buttons now.

    The record counter will confirm that you are moving forward or backward through the records. The previous and next buttons wrap like the page buttons did.

    The Record dropdown can be used to move immediately to any desired record.

10. In the **Record** dropdown, select **Rhoda Tyrell** and display her letter.

    You can just as easily select any record in the query result.

11. Keep the **Document Viewer** open.

12. Continue with the next tutorial.

Tutorial 2.2 – Viewing, Zooming and Scrolling

Documents in the Document Viewer can be viewed in a number of ways and the document image can be zoomed for optimal resolution. Let's learn how.

When a document is first displayed, the view is defaulted to Page Width, which displays the document so that the width of the page fills the available space. The length of the document can then be viewed using the scroll bar. There are four other view options. These are listed in the View dropdown on the Tool Bar. We'll try each.

1. In the **View** dropdown, select the **Percentage** option to show the document in a percent-of-size mode.

   When this option is selected the Percentage dropdown is enabled. You can use the Percentage dropdown to change the size of the document.

2. Try each of the sizes to see which one you like best.

3. Select the **Thumbnail** option.

   This shows each page in the document in a very small size and is not all that useful. If you are viewing a letter or form, the view shows each page in the selected record. If the letter is a single page, only a single page will be shown. If viewing an adhoc report, a group of pages will be shown.

4. Select the **Two Pages** option.

   This shows two pages at a time. It is very useful when you have a two-page letter and you wish to see both pages. If a letter has only one page (regardless of the number of records), just one page is shown.

5. Select the **Whole Page** option.

   This adjusts the size of the document so that a full page of the document is visible at once. Depending on the size of your monitor and the resolution, this may be a useful option.

6. Select the **Page Width** option to return to the default view mode.

   Now let's take a look at the zooming options.

   Zooming In makes the document image larger and is performed using the Zoom In (+) button on the Tool Bar. Each click of the button makes the image larger by zooming in one percentage setting, which corresponds to the settings in the Percentage dropdown.

7. On the Tool Bar, click the **Zoom In** button to make the image larger.

   The first click will change the viewing percentage from the Page Width setting of 125% to the next percentage setting of 150%.

8. Keep clicking that button to make the document really large.

   You will find that you cannot go past 400%, which corresponds to the maximum setting in the Percentage dropdown.

Zooming Out makes the document image smaller and is performed using the Zoom Out (**-**) button on the Tool Bar. Each click of the button makes the image smaller by zooming out one percentage setting, which corresponds to the settings in the Percentage dropdown.

9. On the Tool Bar, click the **Zoom Out** button to make the image smaller. Keep clicking that button to make the document really small.

    You will find that you cannot go lower than 25%, which corresponds to the minimum setting in the Percentage dropdown.

    To zoom in or out, you can also double-click on the document itself using the left or right mouse button.

10. Try double-clicking with the left mouse button and then the right mouse button to see how this performs the same actions as the Zoom In and Zoom Out keys.

    Whenever a document image is larger than the screen, scrolling is enabled. You can scroll a document to show the hidden part using the scroll bar at the right of the screen.

11. In the **View** dropdown, select the **Page Width** option to return to the default view mode. Then use the scroll bar to view the rest of the page. When you reach the end of the page, keep clicking the down arrow on the scroll bar and you will continue on to the next page.

    As with all scroll bars, the square that moves shows you where you are on that page.

12. Now, use the **UP ARROW** and **DOWN ARROW** keys to scroll up and down.

    You can also use the mouse wheel (if your mouse is so lucky to have one) to scroll up and down.

13. Use the mouse wheel to scroll up and down.

    You can also drag the mouse to see the rest of the page.

14. Click and hold down the left mouse button and move the document up and down using the mouse.

    The cursor will change to a hand as you move the document. You can also move the document left and right if the page is wider than the display.

15. In the **View** dropdown, select **Percentage**. In the **Percentage** dropdown, select **200%**.

    The document is made that much larger.

16. Position the cursor over the document and move the document left and right using the mouse.

    Note that you also have a horizontal scroll bar in addition to the vertical scroll bar.

17. Use the horizontal scroll bar to move the document left and right.

    As you have seen, there a number of ways to view a document. You will find the ways that work best for you.

18. Close the **Document Viewer** and the **Explorer**.

19. Continue with the next tutorial.

Tutorial 2.3 – Output Options

One of the most powerful capabilities of the Document Viewer is the ability to output documents to destinations other than just a printer. Let's try these options now.

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

2. In the **Compensation** category, select the **Salary History by Employee** document and run the report.

    This is the document we will use to demonstrate output options. The output options are listed as buttons on the Tool Bar and as options on the File menu. There are eight options: to printer, to spreadsheet, to word processor, to PDF viewer, to HTML viewer, to image viewer, to archive, and to email.

    On all output options except Output to Printer and Email, a temporary file is created and loaded into the software product associated with the appropriate extension. When you close the product and the Document Viewer, the temporary file will be deleted. If you want to modify the document, you need to use the "Save As" feature in the associated product, rename the file and save it in a new location. If you modify the document, the changes are NOT saved back into People-Trak. You are working on a copy of data taken from People-Trak, not live data.

    The printer option is self-explanatory; we have all printed a document to a printer before. Let's start with the spreadsheet option.

    The spreadsheet option is used to output the document to Microsoft Excel, or to a similar product that is associated with the XLS file extension. When this option is selected, a temporary XLS file is created from the document. The product associated with XLS files is then started and the file is automatically loaded.

3. On the Tool Bar, click the **Output to Spreadsheet** button to output the document to a spreadsheet.

    After a brief delay, you will see your document displayed in Excel (or similar product). You can use Excel against this file to perform any desired task.

    Note: If you get a dialog box stating that the file is in a different format than specified by the file extension, just click Yes. This is to be expected in more recent versions of Excel.

4. Close the spreadsheet and then click the **Output to Spreadsheet** button again.

    Note that the spreadsheet loads much more quickly. This happens because Windows leaves parts of the spreadsheet program in memory.

5. Close the spreadsheet.

    Note: The Output to Spreadsheet option only works with documents that are formatted as rows and columns. Letters, labels, forms, screen prints and standard reports cannot use this option. As a result, cluster reports cannot be output to a spreadsheet product. Adhoc reports in tabular format will be output as if they were in columnar. Microsoft Excel can save documents in a wide variety of formats. When you need to create a file for another purpose in one of these formats, simply create a document that contains the data you need, output the document to Excel and then use Excel to save the document in the file

format you need.

The Output to Word Processor option is used to output the document to Microsoft Word, or to a similar product that is associated with the RTF file extension (i.e. WordPad). When this option is selected, a temporary RTF file is created from the document. The product associated with RTF files is then started and the file is automatically loaded.

6. On the Tool Bar, click the **Output to Word Processor** button to output the document to a word processor.

   After a brief delay, you will see your document displayed within Word (or similar product). If the document is a row and column document, the document is placed into a "table". If the document is a letter or labels, the document is presented as simple paragraphs. You can use Word against this file to perform any desired task.

7. Close the word processor.

   Note: Forms, screen prints and standard reports cannot be output to Word or other word processing products. As a result, cluster reports cannot be output to a word processing product.

   The Output to PDF Viewer option is used to output the document to Adobe Reader, or to a similar product that is associated with the PDF file extension. When this option is selected, a PDF file is created from the document. The PDF viewer is then started and the file is automatically loaded.

8. On the Tool Bar, click the **Output to PDF Viewer** button to output the document to a PDF viewer.

   After a brief delay, you will see your document displayed within your PDF viewer. PDF files can be read by the PDF viewer, but are not editable. The usual reason for creating a PDF document is to send the document to someone else via email or another method. Once loaded, you can save the document from within the PDF viewer.

9. Close the PDF viewer.

   The Output to HTML Viewer is used to output the document to your web browser, or to a similar product that is associated with the HTM file extension. When this option is selected, a temporary HTM file is created from the document. The product associated with HTM files is then started and the file is automatically loaded.

10. On the Tool Bar, click the **Output to HTML Viewer** button to output the document to an HTML viewer.

    After a brief delay, you will see your document displayed within your HTML viewer. The HTML viewer does not usually have edit capabilities, but you can use it to save the document as a web page.

11. Close the browser.

    Note: Forms and standard reports cannot be output to an HTML viewer. As a result, cluster reports cannot be output to an HTML viewer.

    The Output to Image Viewer option is used to output the document to Windows Picture and Fax Viewer, or to a similar product that is associated with the EMF (Enhanced

MetaFile) file extension. When this option is selected, a temporary EMF file is created for the current page of the document. The image viewer is then started and the file is automatically loaded.

12. On the Tool Bar, click the **Output to Image Viewer** button to output the document to an image viewer.

   After a brief delay, you will see the current page of your document displayed within your image viewer. If the document was output to Windows Picture and Fax Viewer, you can then open the image for editing in Microsoft Paint. If the document was output directly to an image editor such as Microsoft Paint or Paintshop Pro, the image can then be edited.

13. Close the image viewer.

   The Output to Archive option is used to archive a document for future reference.

14. On the Tool Bar, click the **Output to Archive** button.

   The Output to Archive screen is displayed. You have the option of changing the name of the document, adding a description and assigning a category. Since we have already covered selecting categories, we will show you how to do the first two tasks.

15. In the **Document Name** field, add today's date to the end of the field.

   This might be something you want to do to easily see when that document is archived. Your naming policy is up to you.

   As you can see, the Category for this document has been defaulted to Compensation. We will leave this as is.

   The description field can be used to add further information about this archived document. We'll just put some simple text there to show you where you can find this information later.

16. In the **Description** field, enter **Archive Description**.

   The rest of the fields are for information purposes and are display only.

17. Close the **Output to Archive** screen, saving your changes.

   We will go see where this went in just a minute. Let's look at one more output option first.

   The Output to Email option is used to output the document to email recipients. When a document is sent to email, the document is automatically converted to a PDF file.

18. On the Tool Bar, click the **Output to Email** button to start the email process.

   The Send Email screen is displayed. The title of the document is put in the Subject field on the Message tab. The document is converted to a PDF file and the path to that file is put in the Attachment 1 field on the Attachments tab. You will learn more about this Send Email screen in later training.

19. Close the **Send Email** screen.

Any document that you create in People-Trak is always sent to the Document Viewer for visual inspection. From the Document Viewer, you can decide if you need to print or output the document to another destination. You will often not need to actually print the document, so you can save the paper for another day!

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

Now, let's go see where that archived document went.

21. On the **Documents** menu, select **Archived Documents**.

The Explorer for Archived Document screen is displayed. The Categories for which documents have been archived are listed on the left. The All Documents category is highlighted and all of the archived documents are displayed on the right.

22. On the **File** menu, select **Run Archived Document** or on the Tool Bar, click the **Run Archived Document** button.

The document you archived is opened in the PDF viewer and includes the data that existed at the point in time you performed the output to archive.

23. Close the **Document Viewer**.

24. Close the **Explorer**.

25. This concludes this tutorial and lesson.

Lesson 3
Other Document Types and Properties

Contents

This lesson covers other document types that are available in People-Trak: Standard Reports, Cluster Reports and Freeform Reports. It also covers the Spanning tab and Description field on the Document Properties screen.

Tutorials

Standard Reports: shows how to create a standard report, which is a report with a pre-defined format. Also shows how you can change the query for a standard report.

Cluster Reports: demonstrates how to create a cluster report, which is a report that allows you to run several documents together as a group.

Freeform Reports: shows how to create a freeform report, which allows you to enter an SQL statement and a series of captions to create reports that you could not otherwise create.

Spanning: demonstrates how to use spanning of companies on a document.

Tutorial 3.1 – Standard Reports

Standard Reports are those reports that have a pre-defined format. You can determine what employee records are to be included in the report, but the layout of the report is already set. Let's create a standard report.

1. On the **Documents** menu, select **Standard Reports**.

   The Explorer for Standard Reports is displayed.

2. On the Tool Bar, click the **New Standard Report** button to create a new document.

3. In the **Document Name** field, enter **My Gender Graph**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.

   A standard report document is composed of a standard report template and a query (which could be blank). So, we must select a report template in the Standard Report field.

4. In the **Standard Report** field, click the popup button to display a list of the existing report templates. Select the **Workforce Distribution by Gender** template.

5. Click the **Query** tab.

   As expected, there are no query equations. So, if we run the report, we will see all records in the current company, including those that might be terminated or inactive.

6. Run the standard report.

   The report is a pie chart that graphically indicates the gender makeup of the company. In this instance, it is all employees in the company regardless of status.

7. Scroll down to see the details that support the graph.

8. Close the **Document Viewer**.

   Now, let's enhance the document by adding a query.

9. On the **Query** tab, enter the simple equation shown below.

   Gender   =   Male

   This query will limit the employee records in the report to those whose Gender is Male.

10. Run the report.

    The graph should indicate that a report that queries only males should list only males.

11. Close the **Document Viewer.**

12. This time, change the query to the more meaningful equation below.

    Active   =   Y

13. Now run the report.

This report will provide a chart with all currently active employees. Now that's a useful report.

14. Close the **Document Viewer** and the **Standard Reports** screen.

15. Close the **Explorer**.

16. Continue with the next tutorial.

Tutorial 3.2 – Cluster Reports

Cluster Reports allow you to run several documents 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.

1. On the **Documents** menu, select **Cluster Reports**.

   The Explorer for Cluster Reports is displayed.

2. On the Tool Bar, click the **New Cluster Report** button to create a new document.

3. In the **Cluster Name** field, enter **Monthly Reports**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.

4. On the **Documents** tab, click the popup button.

   The Select Document screen is displayed. Notice that Cluster Reports is not listed in the list of document types in the upper left pane. This is because cluster reports cannot include another cluster reports. You can choose from all other document types. We will select an Adhoc Report.

5. Stay in the currently highlighted **Adhoc Reports** type. Select the **Compensation** category in the list of categories in the lower left, and then select the **Salary History by Employee** document in the list on the right. Click **OK** to return that document to the **Documents** grid.

   Let's add two more Adhoc Reports to our cluster report.

6. On the next row of the grid, use the popup and select the **Attendance Balances by Account** document from the **Attendance** category. Keep going and add the **Headcount by Department** document from the **Headcount** category.

   We can mix document types in a cluster report. Let's add a letter.

7. On the next row of the grid, use the popup and select **Letters** in the list of document types. Now, select the **Welcome Letter** document in the list on the right. Click **OK** to return that letter to the **Documents** grid.

8. Run the cluster report.

   Each document is processed independently and you may be able to see the progress bar for each. When the documents are complete, they are merged together and then shown within the Document Viewer.

   The documents are discrete within the Document Viewer. The page counter on the Tool Bar reflects the total number of pages in the cluster report, but each document's pages are numbered from 1 to the total number of pages in the document. Font settings, alignment, spacing, and grid lines are all unique to each document.

9. Move through the pages of the cluster report and you can see that each document is unique.

   Letter, Label and Form documents will not include a Navigation Bar because a cluster report can include several different types of documents. The Cluster Report feature is

intended to provide an easy way of outputting several documents; it is not intended to be used for interactive purposes. In addition, the Output to Spreadsheet option is not available.

If you choose to print the cluster report, one stream of pages will be printed.

10. Close the **Document Viewer** and the **Cluster Reports** screen.

11. Close the **Explorer.**

12. Continue with the next tutorial.

Tutorial 3.3 – Freeform Reports

Freeform reports allow you to enter an SQL statement and a series of captions to create reports that you could not otherwise create. Normal use of this feature requires specific knowledge of SQL and internal knowledge of the People-Trak database. Such knowledge is beyond the scope of this tutorial, but we can show how the feature works and what you can do with it.

The Freeform Reports feature bypasses all field security. If a user is allowed to create a freeform report, they can access any field within People-Trak. For this reason, there are special security settings for the freeform reports feature. We'll explore these first.

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

    On the General tab, there are two fields that control use of the Freeform Reports feature. The Create Freeform Reports field grants the ability to create these reports, and this is the ability that must be carefully used. If a user can create Freeform Reports, they can view virtually any information in People-Trak.

    The Run Freeform Reports field grants the ability to run freeform reports, but not to create them. So, it is possible to have some users with appropriate clearance create reports that can then be run by other users. Of course, it is important that the reports that are given to other users do not contain protected information.

    In order to see how these security settings work, we need to have the DEMO user not be an Administrator because an Administrator bypasses all security settings.

2. Clear the **Administrator** check box for the **DEMO** user.

3. Clear the **Create Freeform Reports** and **Run Freeform Reports** check boxes.

4. Close the **Security Setup** screen, saving your changes.

5. Open the **Documents** menu. Note that **Freeform Reports** is not listed as an option.

6. Return to **Security Setup** and select the **Create Freeform Reports** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.

7. Open the **Documents** menu. Note that **Freeform Reports** is now listed as an option. Select **Freeform Reports** and let's get started.

8. On the **File** menu, select **New Freeform Report** or on the Tool Bar, click **New Freeform Report**.

    The Freeform Reports screen is displayed. This screen contains three tabs. The Specification tab is similar to the Adhoc Reports screen. The SQL Statement tab contains a single text box for entering the SQL statement. The Report Captions tab contains a grid for entering captions and formatting formulas.

9. In the **Document Name** field, enter **SQL Test Report**. In the **Explorer Category** field, enter whatever category you desire. Leave the **Category** field set to **User**.

10. On the **SQL Statement** tab, enter the following SQL statement.

    Select Name_Last, Name_First from PMMain

11. Run the report.

    Can't find the Run option? There is a good reason for this. You still have the Run Freeform Report check box cleared for your DEMO user in Security Setup. This means you cannot run Freeform reports. Let's change that.

12. Close the **Freeform Reports** screen, saving your changes. Close the **Explorer**.

13. Return to **Security Setup** and select the **Run Freeform Reports** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.

14. On the **Documents** menu, select **Freeform Reports**. Open your **SQL Test Report** document and then run it.

    This report lists the last name and first name for each employee in the database. There was no restriction on companies, so all employees in all companies are listed. (SQL statements are a type of programming; they do what you tell them to do and nothing more.)

    As you can see in the Document Viewer, there are no captions in the report. We can fix this.

15. Close the **Document Viewer**.

16. On the **Report Captions** tab, enter two **Captions**: **Last Name** and **First Name**.

    The two fields on our report do not need any formatting, so we will leave the Format column blank.

17. Run the report again.

    It should look much better with these captions.

18. Close the **Document Viewer.**

    As indicated above, there is insufficient scope to teach SQL, but to whet your appetite to learn more on your own, we'll show a few other tricks.

19. On the **SQL Statement** tab, clear the existing SQL statement, and enter the following:

    Select Avg(Age) from PMMain

    This statement will calculate the average age of all employees.

20. Run the report.

    You can see that there are two problems. First the caption is wrong and second, there are too many digits to the right of the decimal point. We can fix both.

21. Close the **Document Viewer**.

22. On the **Report Captions** tab, change the first **Caption** to **Average Age** and delete the second **Caption**. Set the **Format** column for the first row to **"#.00".**

    This will simplify the display to just two decimal places.

23. Run the report and you can see the fruits of your efforts.

    The combination of SQL statements and People-Trak formatting capabilities can allow those with a working knowledge of SQL to create a very wide range of reports. In certain instances, your Support Representative will provide a Freeform Report solution for you should the two of you be unable to create the desired report with the Adhoc Reports tool.

24. Close the **Document Viewer**, the **Freeform Reports** screen and the **Explorer.**

    Before we leave, we need to get DEMO set back to Administrator.

25. Return to **Security Setup** and select the **Administrator** check box for the **DEMO** user. Close the **Security Setup** screen, saving your changes.

26. Continue with the next tutorial.

Tutorial 3.4 – Spanning

Now we are going to switch gears a bit and look at document properties that you have not yet learned about. The first one is document spanning where you can have documents span multiple companies at your discretion. Here is how you do it.

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

2. Create a new **Adhoc Report** named **All Employees** and place it in any **Explorer Category** you desire. Leave the **Category** field set to **User.**

3. Leave the **Query** tab blank, but add two fields to the **Report Definition** tab: **Employee ID** and **Full Name**. Add a **Count** calculation on the **Full Name** field so that we can count the records.

4. Run the report and note the number of records that qualify.

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

    Your new report should be highlighted in the Explorer.

6. On the **File** menu, select **Adhoc Report Properties** or on the Tool Bar, click the **Adhoc Report Properties** button to display the properties for this document.

    The Adhoc Report Properties screen is displayed for this document.

7. Click the **Spanning** tab.

    This tab provides a grid in which to record the companies that are to be spanned. In this case, the grid is blank. When you ran the report, however, records were displayed and counted. Why? Because when there is no company specified, the report will be run for the current company only. Once you specify one or more companies, the report will be run for those companies regardless of which company is the current company.

8. Close the **Adhoc Report Properties** screen and close the **Explorer**.

9. Use what you already know to transfer the following three records from the **ACTIVE** company to the **ARCHIVE** company.

1017	**Anna Belamonte**
1019	**Helen Pilsner**
1020	**Renee Watanabe**

10. Close any open records to return to the **Organizer** desktop.

11. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company. Confirm that the three records have been transferred. Return to the **ACTIVE** company.

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

13. Find and highlight the **All Employees** report you created earlier in this lesson. Run the report from the **Explorer**.

    There should be three less records than there were before because we moved three

records from the ACTIVE company to the ARCHIVE company, and we are currently in the ACTIVE company.

14. Close the **Document Viewer** and the **Explorer**.

15. On the **File** menu, select **Select Company** and switch to the **ARCHIVE** company.

16. Open your report and run it again.

    How many records are shown this time? There should be as many records as there are in the current company, which is the ARCHIVE company.

17. Close the **Document Viewer**.

    You can also access the Adhoc Report Properties screen from within the screen for the report itself.

18. On the **Adhoc Reports** screen, use the **Adhoc Report Properties** option on the **File** menu or the **Adhoc Report Properties** button on the Tool Bar to display the **Adhoc Report Properties** screen.

19. Click the **Spanning** tab. On the first line in the grid, click the popup button to display a list of the available companies. Select the **ACTIVE** company. Close and save the changes to the properties.

20. Run the report again.

    This time, how many records are shown? Even though we are currently in the ARCHIVE company, all of the records from the ACTIVE company are shown because that is what the spanning instructions state.

21. Open the **Adhoc Report Properties** screen again. On the **Spanning** tab, add the **ARCHIVE** company to the list of companies for our sample report. Close and save the properties.

22. Run the report again.

    This time, all of the records in the ACTIVE and the ARCHIVE companies are shown. This will be true regardless of the company you are currently working in even if it is not one of the companies in the spanning list.

23. Finally, use the **Adhoc Report Properties** screen to remove both of the companies from the spanning list. Now, run the report again, and it will contain the employees from the current company only.

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

25. Transfer the three employees from the **ARCHIVE** company back to the **ACTIVE** company.

26. Switch back to the **ACTIVE** company.

    Spanning is only available to Administrators for security purposes, so when non-administrators run a document that spans, they will only see information for the current company and based on their given security.

27. This concludes this tutorial and lesson.

Notes

Lesson 4
Templates

Lesson Contents

This lesson covers how to use the Explorer to create and modify templates. It also shows how to create documents from a template and a query as well as print labels for a group of employees during an editing session. The lesson concludes with a demonstration of how to copy a template.

Tutorials

Select and Modify an Existing Template: shows how to select an existing template and modify it.

Create a Label Template: demonstrates how to create a new label template from scratch.

Create and Print a Label Document: shows how to create a document from a label template and a query. Also demonstrates how to make a copy of a document.

Print Labels for a Group: demonstrates how to print labels for a group of employees during an editing session.

Copy a Template: shows how to copy an existing template and make changes to the new template copy.

Tutorial 4.1 – Select and Modify an Existing Template

Within People-Trak, a document is defined as a template (or document design) and a query. The template determines what the document looks like and the query determines which records are to be included. In the tutorials in this lesson, we will be using label templates to demonstrate the basics of working with a simple template. These basics also apply to letter templates. We will use letter templates in the next lesson to show some advanced editing features.

1. On the **Templates** menu, select **Label Templates**.

    The Label Templates screen is displayed. Label templates are displayed in the list on the left. The details for the highlighted template are shown on the right.

2. Select **Address Label - Avery 5160** in the list of templates on the left.

    The standard settings for this label template are displayed on the right. We want to use the standard 5160 label, so we will leave these settings as is.

3. On the **File** menu, select **Edit Label Template** or on the Tool Bar, click the **Edit Label Template** button to start the text editor.

    When the Label Template Editor screen is displayed, note that the edit area has been sized to match Avery 5160 label.

    This label contains no literal text. It contains only fields. The fields are indicated by the ~F~ placeholders.

4. Move the cursor over one of the placeholders.

    The cursor icon switches to an arrow whenever you hover over a placeholder. You can use this feature to identify (and to optionally change) an existing field in a template. Try it now.

5. Move the cursor over the first placeholder and then double-click.

    The Field Settings screen is displayed. It shows the name of the field and any applicable modifiers.

6. Close the **Field Settings** screen and try another field.

7. Close the **Field Settings** screen.

    You can also show all of the fields at once.

8. On the **Field** menu, select **Show Fields** to display the field names.

    From the field names, it is clear that this is an address label.

9. Select **Show Fields** again to change the field names back to placeholders.

    Now, let's add the Country field to the label template.

10. Click on the first line after the last placeholder.

11. On the **Field** menu, select **Insert Field** or on the Tool Bar, click the **Insert Field** (~**F**~) button to start the insert.

    The Field Settings screen is displayed.

12. In the **Field Name** field, select **Country**. Click **OK** to insert the field.

    The national address label has now been switched to an international address label.

13. Close the **Label Template Editor** screen, saving your changes.

14. Close the **Label Templates** screen, saving your changes.

15. Continue with the next tutorial.

Tutorial 4.2 – Create a Label Template

In the last tutorial, you learned how to view and modify an existing template. In this lesson, you'll create a template from scratch. Let's get started.

1. On the **Templates** menu, select **Label Templates**.

2. On the Tool Bar, click the **New Template** button.

3. In the **Template Name** field, enter **My Big Label Template**.

    The Label Type field allows you to pick the specific label type you want to use. People-Trak is shipped with many standard label types. If you need to add label types, you can do so using the Maintain Label Types utility.

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

5. In the **Label Type** field, select **Avery 5164**.

    This is a somewhat larger label.

6. On the Tool Bar, click the **Edit Label Template** button to start the text editor.

    When the Label Template Editor screen is displayed, the edit area is sized to reflect the actual size of the label.

7. Because this is a large label, change the **Font Size** to **14**.

8. Press **ENTER** twice to move the cursor down two lines.

    Now let's insert a field.

9. On the **Field** menu, select **Insert Field** or on the Tool Bar, click the **Insert Field** (**~F~**) button to start the insert.

    The Field Settings screen is displayed.

10. In the **Field Name** field, select **Full Name**. Click **OK** to insert the field.

11. On the next line, insert the **Address 1** field.

12. On the next line, insert the **Address 2** field.

13. On the next line, insert the **City, State Zip** compound field.

14. To customize your large label, change the font attributes on the **Address 1** field to **Bold**, **Italic**, and **Underline**.

    Remember, you can do this by highlighting the field and then setting the attribute.

15. Finally, to show that a template can contain text other than fields, press **ENTER** several times and add a line at the very bottom of the label that says: **Bottom of the label**.

    Note: You will need to use the right arrow at the **City, State Zip** field to get past it if there is no blank line under it yet.

16. Close the **Label Template Editor** screen, saving your changes.

17. Close the **Label Templates** screen, saving your changes.

18. Continue with the next tutorial.

Tutorial 4.3 – Create and Print a Label Document

Now that we have created a template, it is time to create a document that uses that template.

1. On the **Documents** menu, select **Labels**.

2. On the Tool Bar, click the **New Label** button to create a new document.

3. In the **Document Name** field, enter **Label Using Big Label Template**.

4. In the **Explorer Category** field, select any desired category. Set the **Category** field to **Personal**.

5. In the **Label Name** field, use the popup button to select the **My Big Label Template** we just created.

6. Leave the **Sort** fields blank for the moment.

7. Now run the label.

    You should have multiple pages with four labels per page. Move through the pages and enjoy your big label. It is truly something "big".

8. Close the **Document Viewer**.

9. In the **Sort By 1** field, select **Last Name**.

10. Now run the labels again.

    Your big labels are now listed in order by last name. That's even a bigger accomplishment.

    Now, let's add a query.

11. On the **Query** tab, add the following equation, which will list those employees who have really big pay rates.

    Pay Rate   >   5000

12. Run the report.

    The number of big labels is now smaller because there are fewer employees with pay rates greater than $5000.

13. Close the **Document Viewer** and the **Labels** screen.

    Your "big" document should be highlighted in the Explorer.

14. On the **File** menu, select the **Copy Label** option.

    There will now be an identical copy of the document with the phrase "-1" appended to the document's name.

15. Open the copy and change the **Document Name** field to **Label 2 Using Big Label Template**. On the **Query** tab, change the equation to look for employees who have pay rates less than $5000.

16. Run the document to test it.

    You now know how to create two separate documents that use the same template. Because a document is composed of a template and query, these are not the same document because they have a different query. You can create other documents that use your "big" template as well. Each document will be unique.

17. Close the **Document Viewer**.

18. Before closing the **Labels** screen, delete the query row on the **Query** tab and remove the **Last Name** sort on the **Specification** tab, saving your changes.

19. Close the **Explorer**.

20. Continue with the next tutorial.

Tutorial 4.4 – Print Labels for a Group

As we just saw, labels and letters for all employees can be printed within the Explorer. They can also be printed for any single employee or for a group of employees during an editing session. Here's how.

First, let's select a group of records for which to print labels.

1. Click the **Open Employee** shortcut and use the **Lookup Employee** screen to select employees with a **Last Name** that starts with **B**. If you wish, use the **Edit Lookup** option after that record group is open to customize the group to contain exactly those members for whom you wish to print a label.

2. On the **Category Bar**, click the **Category Documents** button.

   The Documents for Personal Category screen is displayed.

3. Select the **Document Type** column header, so that the documents are sorted by type. You should be able to easily locate our label now.

4. Select **Label 2 Using Big Label Template**.

5. Click on the **Select Group** button, until the button below it reads **Current Group**. This will run the labels for all the employees you designated. (**Current Record** will only use the current record, and **Use Query** will use the query in the document.)

6. Click the **Run** button to run labels for the group.

   The list of employees is processed and after a brief delay the Document Viewer will be displayed with your labels. There should be one label for each employee in the group.

7. Close the **Document Viewer**.

8. Close the **Documents for Personal Category** screen.

9. On the Tool Bar, click the **Close Employee** button to close the current record group.

   The ability to perform group functions is available when transferring records, printing documents, and sending email. The process is the same. Once you have a group identified, you can select the appropriate option from the File menu or on the Tool Bar. From there, you will be prompted to perform the function for the current record or for the entire group.

10. Continue with the next tutorial.

Tutorial 4.5 – Copy a Template

There are times when you might want to copy an existing template and tweak it a bit. For example, you might want to print the same information as on an existing label, just on a larger label. Or you might want similar information on the same-sized label, but you want to change a few fields. In these cases, you would want to copy a similar template and make some adjustments. Let's see how this works.

1. On the **Templates** menu, select **Label Templates**.

2. Select **Address Label - Avery 5160** in the list of templates on the left.

3. On the **File** menu, select **Copy Label Template**.

   A new template is created with the name of **Address Label - Avery 5160-1**.

4. Change the **Template Name** to be **My All-American Label**.

   If you wanted to change the Label Type, you could. In our case, we want to keep the same label size and just change on a field on the label.

5. On the **File** menu, select **Edit Label Template** or on the Tool Bar, click the **Edit Label Template** button.

   The text editor is opened and your new label template is displayed.

   We are going to remove the Country field we added earlier.

6. Click anywhere on the **Country** field placeholder. On the **Field** menu, select Delete Field.

   The Country field is removed from the label.

7. Close the **Label Template Editor** screen, saving your changes.

   Let's delete the label template we just created.

8. On the **File** menu, select **Delete Template** or on the Tool Bar, click the **Delete Template** button. Click **Yes** to delete the template.

9. Close the **Label Templates** screen saving your changes.

10. This concludes this tutorial and lesson.

Notes

Lesson 5
Advanced Template Editing

Lesson Contents

This lesson covers the advanced features of the Text Editor while creating a letter template. This includes headers and footers, images, and tables.

Tutorials

Create a Letter Template: shows how to create a basic letter template. This includes setting page margins.

Add a Header and Footer: demonstrates how to add a header and footer to a letter template.

Insert an Image: shows how to insert one or more images into a letter template.

Add a Table: demonstrates how to add a table to a letter template and how to add merge fields to the columns in the table.

Tutorial 5.1 – Create a Letter Template

In the last lesson, you created a label template. In this tutorial, you are going to create a letter template. All of the advanced text editor features in this lesson also apply to label templates.

1. On the **Templates** menu, select **Letter Templates**.

2. On the Tool Bar, click the **New Template** button.

3. In the **Template Name** field, enter **My Special Letter**.

    Like the Label Type field you learned about earlier, the Paper Size field allows you to pick the specific paper size you want to use. People-Trak is shipped with many standard paper sizes. If you need to add paper sizes, you can do so using the Maintain Paper Sizes utility.

4. Leave the **Paper Size** field set to **Letter**.

5. On the Tool Bar, click the **Edit Letter Template** button to start the text editor.

    When the Letter Template Editor screen is displayed, the editable area is shown in Page Layout view, which allows you to see the margins, header and footer. You have an option of changing to Draft view, which is sized like a word processor for full-page documents. We will stay in Page Layout view for our demonstration.

6. On the Tool Bar, in the **Percentage** dropdown, select **75**.

    The default page margins are one inch on all four sides. Note that the cursor is currently located one inch in from the top and left edges.

7. On the **File** menu, select **Page Setup**.

    The Page Setup screen is displayed.

8. Change the **Top**, **Bottom**, **Left** and **Right** margins to **1.50** inches. Click **OK** to make those changes to the page setup.

    The Ruler Bar is updated to reflect the new settings and the cursor is now 1.5 inches in from the top and left edges.

    When you first enter a new letter, the default Font is Arial and default Font Size is 11.

9. On the Tool Bar, use the appropriate dropdowns to change the **Font** to **Times New Roman** and the **Font Size** to **12**.

10. Enter the following paragraph and press **ENTER**:

    This is my sample letter. In this letter, I will learn how to set margins, add a header and footer, insert images, and add tables.

11. Continue with the next tutorial.

Tutorial 5.2 – Add a Header and Footer

Headers and footers can only be viewed and edited when you are in Page Layout mode. You choose to edit a header or footer while in Draft mode, but you will be automatically switched into Page Layout mode to accomplish that. Let's see how that works.

1. On the **View** menu, select **Draft**.

   The letter is now shown in Draft mode.

2. On the **Edit** menu, select **Edit Header**.

   The following message is displayed:

   Switching to Page Layout mode

3. Click **OK** to close the message.

   The header area is outlined by dotted lines and includes 'Header' as the current text. This is a placeholder and you will need to change the header text to the desired phrase.

4. Change the phrase from **Header** to **Sample Letter**.

   Whenever you are positioned to either the header or footer editing areas, the various editing and formatting options on the Tool Bar apply to the text in that area and not to the main editing area. So, if you wished to right justify the header (it is currently left justified), you can do so using the Right Justify button on the Tool Bar. Try it now.

5. Click the **Right Justify** button to cause the phrase **Sample Letter** to be right justified within your header.

6. Change the font attributes of the **Sample Letter** phrase to **Bold** and **Underline** using the appropriate buttons on the Tool Bar. (You will need to highlight the text first.)

7. Return to the main editing area by clicking in that area.

   Any actions now performed using the Tool Bar buttons will apply to the main editing area.

   Let's add footer. With the header or the footer, you can use the Edit Header or Footer options on the Edit menu, or you can just click in the header or footer areas. Let's try the second option for editing the footer.

8. Using the scroll bar, scroll down to the bottom of the letter. Click on the **Footer** text in the footer area.

   The footer area is now outlined by dotted lines to show that you are editing that area. As with the header, this is a placeholder that you can change to any desired phrase.

9. Change the phrase to "**Page:"** including a space after the colon.

   Now we'll see how to add page numbers to this footer (and thus to any header or footer you create).

10. Verify that the cursor is just to the right of the "**Page:**" phrase. On the **Insert** menu, select **Page Number**.

You will see the number 1 displayed. The number 1 is not a literal; it is a variable. The 1 is showing because you are on the first page of your letter. The number will automatically increment with each page of the letter. Now let's format the page number.

11. Highlight the footer text, and use the **Font** and **Font Size** dropdowns to change the **Font** to **Times New Roman** and the **Font Size** to **10**. Then, highlight the page number portion of the phrase and make it **Bold**.

12. Click in the main editing area.

13. Continue with the next tutorial.

Tutorial 5.3 – Insert an Image

An image can be inserted at any point in a document. Let's see how to insert an image and also move it around.

1. Click on the line just below the paragraph that you typed.

2. On the **Insert** menu, click **Picture**.

   The Select File screen is displayed. This screen is used to select image files.

3. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the file named **PETE&PETUNIA.JPG**.

   The image contained in this file is displayed in your letter. It is a picture of our dear friend Pete the People-Stik with his gal Petunia!

   Once an image has been inserted into your letter, you can move the image around just as if it were a large character. For example, if you wish to move the image down, you can do so by inserting lines above the image. Try it now.

4. Click on the line above the image and press **ENTER** a few times.

   Note that the image moves down.

5. Now delete some of the blank lines and the image will move back up.

   The image can also be aligned just like text.

6. Select the image by clicking on it. On the Tool Bar, click the **Right Justify** button to align the image with the right margin. Then click the **Center** button to align the image between the margins. Finally, use the **Left Justify** button to align the image with the left margin.

   The image can also be moved around with tabs.

7. Click on the line immediately above the image. Then press **DOWN ARROW** to position the cursor to the image without actually selecting the image. Now press **TAB** to push the image to the right.

   The image will align with the next tab stop shown on the Ruler Bar.

   Now let's see how to delete the image.

8. Select the image by clicking on it. Then press **DELETE** and the image will be deleted.

   That's all there is to deleting an image.

9. Now, use the techniques used above to select the image again.

10. Continue with the next tutorial.

Tutorial 5.4 – Add a Table

A table can be inserted at any point in a document, except within an existing table. This tutorial will show you how to insert a table and then specify its contents.

1. Click on the blank line below the image that you inserted in the prior tutorial.

2. On the **Table** menu, select **Insert Table** to insert a new table.

   The Table Attribute screen is displayed. This screen is used to specify the number of rows and columns in the table.

3. Specify **10 Rows** and **4 Columns**, and click **OK**.

   When you have specified the rows and columns, the table will be inserted into the letter. Note that an additional caption row was added and that captions were inserted for you. This feature speeds the process of adding caption rows considerably.

   We are going to create a Skills Inventory table on this letter.

4. Change the captions to the following phrases: **Skill Desc**, **Skill Date**, **Skill Level**, and **Skill Comment**. In addition, change the alignment of the caption phrases from **Left Justified** to **Centered**. You can do this one caption at a time or you can select the entire caption row and do it all at once.

   Now we need to insert the merge fields. This looks like a daunting task as there are 40 separate fields to insert, but there is a very nice feature in People-Trak that will make this task quite easy.

5. Click in the first column of the first blank row. On the **Field** menu, select **Insert Field** or on the Tool Bar, click the **Insert Field** button to display the **Field Settings** screen. In the **Field Name** field, use the popup button to select the **Skill Description** field from the **Training/Competency** category.

   At this point, you would normally wish to specify a Row Modifier to indicate the first skill because this is the first row. However, you can take advantage of the "Autoset" feature within People-Trak by leaving the Row Modifier field blank.

6. Click **OK** to close the screen.

   People-Trak automatically detects that you are inserting fields into a table and provides the following prompt:

   Autoset the column?

7. Click **Yes** and see what happens.

   The entire column is populated with the Skill Description field and the Row Modifiers are automatically sequenced from one to the highest numbered row in the table.

8. Check this by double-clicking on any of the fields.

   When the Field Settings screen is displayed, you can see that the both the Field Name and the appropriate Row Modifier have been supplied.

9. Repeat this process for the second column using the **Skill Date** field. Then complete column three using **Skill Level** and column four using **Skill Comment**.

10. On the **Field** menu, select **Show Fields**.

   You can see all the Field Names and Row Modifier combinations that are inserted into the table.

   Now let's see how this letter works.

11. Close the **Letter Template Editor**, saving your changes.

12. Close the **Letter Templates** screen, saving your changes.

13. On the **Documents** menu, select **Letters**.

14. On the Tool Bar, click the **New Letter** button.

15. In the **Letter Name** field, use the popup button to select the **My Special Letter** we just created.

16. Run the letter.

   You should see your header and footer, the image you inserted, and the Skills Inventory table you added. This letter, as you have created it, is not entirely useful unto itself, but you now know how to use many of the powerful features of the Letter/Label editor.

17. Close the **Document Viewer.**

18. Close the **Letters** screen.

19. Close the **Explorer**.

20. This concludes this tutorial and lesson.

Notes

Lesson 6
System Templates

Lesson Contents

This lesson covers how to create system templates and add them to documents. This includes cover sheets and header and footer annotations. It concludes by demonstration how to modify an existing email closing template.

Tutorials

Creating an Attendance Report: reviews creating an adhoc report with a query statement.

Creating a Cover Sheet: demonstrates how to create a cover sheet using the System Templates Editor

Creating Annotations: shows how to create header and footer annotations using the System Templates Editor.

Adding System Templates to a Document: shows how to add System Templates to a document using the Document Properties screen.

Creating an Email Closing: shows how to create an email closing using the System Templates Editor.

Tutorial 6.1 – Creating an Attendance Report

As you have previously learned, creating a report is a much more efficient way to gather information about employees as opposed to going through individual records.

In this case, we want a list of employees who have breached the company attendance policy by using more than 40 hours from their illness account. First, we need to make a few changes to ensure that we do indeed have violators.

1. Open up **Julie Carrington's** record and view her **Attendance** screen.

2. Find the **Illness** account row and in the **Current Used** column, change the amount to **41** and save your change.

3. Repeat the same steps in **Donald Stern's** record, changing the amount to **44**.

4. Close **Donald's** record, saving your changes.

5. Create a new **Adhoc Report** and name it **Illness Account Overage**.

6. For the **Explorer Category** and **Category**, select **Attendance**.

7. Select the **Report Definition** tab and select the following fields for our report:

   Full Name

   Attendance Account

   Hours Used

8. On the **Full Name** field, select a **Sort Type** of **Eject** so that we can see each employee on their own page of the report.

9. For both the **Attendance Account** and **Hours Used** fields, select a **Row Modifier** of **2**, so that we are pulling data from the hours that have been used in the employee Illness account.

10. On the **Query** tab, enter the equation shown below, using the same **Row Modifier** of **2** that our report definition had:

    Hours Used   2   >   40

11. Run the report and examine the evidence.

    It looks like we have two violations on our hands!

12. Save your changes and close all screens.

    Despite the fact that the data is all there, this attendance report could use more substance. If it was placed on a manager's desk as is, much would be left to the imagination as to what the report was for or what the next step would be. We will create a cover sheet for this very purpose in the next tutorial.

13. Continue with the next tutorial.

Tutorial 6.2 – Creating a Cover Sheet

1. On the **Administration** menu, select **System Templates**.

   At first glance, the System Templates screen is quite similar to the Letter Template screen, except it includes a Template Type field. In addition, all system templates use the standard text editor.

2. Create a new **System Template** and give our new template the name **Attendance Violation.**

3. In the **Template Type** field, select the popup to display the **Select Template Type** screen and select **Cover Sheet**.

   Cover Sheet templates are single page documents that are automatically pre-pended to documents when they run. This template enables you to create the cover sheet just the way you want it. For now, we will focus on creation and will show you how to add it to our report further on in the lesson.

4. On the **Tool Bar**, click the **Edit Template** button to start the template editor and enter the following text:

   ~F~ (insert Company Logo)

   According to ~F~ (insert Company Name) **records, you have one or more employees in violation of company attendance policy.**

   Please review the included report, follow the instructions provided on each page and return them to Human Resources.

   Thank You,

   ~F~ (insert User Name)
   ~F~ (insert User Title)

   You may have noticed that only the system merge fields were available to select from. Within system templates, you can select fields that pertain to the company and current user, but not anything from employee or applicant record because they would not be applicable here.

5. Close the **Cover Sheet Template Editor**, saving your changes. We will remain in **System Templates** for the next tutorial.

6. Continue with the next tutorial.

Tutorial 6.3 – Creating Annotations

If you recall what our report looked like, there wasn't a designated signature area. And we definitely do not want managers signing haphazardly wherever they choose. This issue can be solved by adding headers and footers, also known as annotations, to our attendance report.

Let's start by creating footer for employees to include their signature.

1. Create a new **System Template** and name it **Manager Signature**.

2. In the **Template Type** field, select Footer Note and start the template editor.

3. Enter the following text:

   Manager Signature: _____

4. Close the **Footer Note Template Editor**, saving your changes but remain in the **System Template Editor.**

   Just to make sure our managers understand the power of their signature on this report, it would be best to add a header with additional information.

5. Create a new **System Template** and name it **Attendance Acknowledgement**.

6. In the **Template Type** field, select **Header Note** and start the template editor.

7. Enter the following text:

   By signing this report I acknowledge this employee's attendance violation

8. Save your changes and close all screens.

Tutorial 6.4 – Adding System Templates to a Document

With our cover sheet and annotations finished, we are ready to add them to our report and see how everything works together.

1. Open the **Adhoc Reports Explorer**. In the **Attendance** category, find and highlight the **Illness Account Overage** report, but do not run it.

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

    The Adhoc Report Properties screen is displayed with the tabs available for this report, most of them which you should recognize. Notice there is a Cover Sheet tab as well as one named Annotations that we have yet to explore. We are going to start by adding our cover sheet on the Cover Sheet tab.

3. Select the **Cover Sheet** tab.

4. In the **Cover Template** field, click the popup button.

    The Select Template screen is displayed. You will only see Cover Sheet templates that are available for use, one of them being the one we just created. Templates available will depend on the template type selected as you will see when we set the header and footer for this report.

5. Select our **Attendance Violation** cover sheet and return to the **Adhoc Report Properties** screen.

    Now we can start to add some annotations.

6. Select the **Annotations** tab.

7. In the **Header Template** field, click the popup button and select the **Attendance Acknowledgement** header.

8. In the **Footer Template** field, click the popup button and select the **Manager Signature** footer.

    For both the header and footer there are checkboxes that will repeat the header and footer on each page of the report when they are selected. If they are not selected, they will appear on the first page only. We want our header and footer on all pages.

9. Select the **Repeat Header** and **Repeat Footer** checkboxes

10. Save your changes, return to the document explorer and run our report.

    Our cover sheet shows up as the first page of our document and if we look through the actual report pages, we will see the headers and footers perfectly placed as if they had always been there. The report is ready for manager distribution!

11. Continue with the next tutorial.

Tutorial 6.5 – Creating an Email Closing

Email closings add a professional touch to email messages and For now are going to add some pizzazz to an existing email closing and see how to use the closing in a future lesson.

1. On the **Administration** menu, select **System Templates.**

2. Select **Standard Email Closing** in the list of templates on the left.

3. On the **File** menu, select **Edit Template** or on the Tool Bar, click the **Edit Template** button to start the text editor.

   First, let's take a look at what fields we will be working with.

4. On the **Field** menu, select **Show Fields** to display the field names.

   The email closing already includes the name and title of the system user. We are going to go ahead and add the system user's email address and phone number.

5. Select **Show Fields** again to change the field names back to placeholders.

6. Click on the first line after the last placeholder.

7. On the **Field** menu, select **Insert Field** or on the Tool Bar, click the **Insert Field** (**~F~**) button to start the insert.

   The Select Field screen is displayed.

8. Select **User Email**. Click **OK** to insert the field.

9. On the next line, insert the **User Telephone** field.

10. Close the **Email Closing Template Editor** screen, saving your changes.

11. Close the **System Templates** screen, saving your changes.

    An email closing is assigned in User Setup for each user. Since we modified an existing template, all we need to do is confirm that it has been assigned to the DEMO user.

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

13. Select the **Preferences** tab.

    It looks like the Standard Email Closing has already been assigned to the DEMO user, so no need for us to make changes.

14. Close **User Setup**.

15. Continue with the next tutorial.

Lesson 7
Form Templates

Lesson Contents

This lesson covers the steps required to create a form template, which allows you to easily output People-Trak data on any form. It also demonstrates how to create complex custom forms for reporting purposes.

Tutorials

Create a Form Template: shows how to create a form template by selecting the PDF form to use and the fields to be included on the form.

Using Preview Mode: demonstrates how to move some of the objects you have placed on the form template.

Object Properties: demonstrates how to make changes to the location and size of objects on a form template by using the Object Properties screen.

Produce a Form Document: shows how to produce a form document that uses the form template and a query you specify.

Create a Form Template 2: demonstrates how to create a complex custom form for reporting purposes.

Create a Form Template 3: reviews how to create a form template by selecting the PDF form to use and placing fields to be included on the form.

Create a Form Template 4: shows how to create a form template by selecting an edited PDF form to use and the fields to be included on the form.

Tutorial 7.1 – Create a Form Template

A form document allows you to easily output People-Trak data on any form you desire. The first step in preparing a form document is to create the form template on which it is based. Let's get started.

1. On the **Templates** menu, select **Form Templates**.

    The Form Templates screen is displayed.

2. On the **File** menu, select **New Form Template** or on the Tool Bar, click the **New Form Template** button to start a new form template.

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

3. In the **Form Name** field, enter **Emergency Contact Form**.

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

5. Leave the **Paper Size** field set to **Letter** because that is the correct size of our form.

    The Page Width and Page Height fields are informational and show those dimensions in inches.

6. For this tutorial, leave the **Print Form** check box selected so the background form will be printed. Our form takes up the entire page, so we need to make sure the margin boundary is set to 0.

7. In the **Margins** field, click the popup.

    As you can see, you can select a margin from 0 to 1 inch in ¼ increments.

8. Select **0**.

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

9. Click the **Select Form** button to start the process.

    The Select File screen is displayed. Only PDF files will be shown as you browse.

10. In the **PT9\ SAMPLES** directory of your local People-Trak drive, select the file named **EMERGENCY CONTACT FORM.PDF**.

    The Print Form field enables a powerful feature within People-Trak. You need to select a background form, as we have, to allow you to align fields on the form. However, it is not necessary to actually print the background form when the form is produced. For example, if you create a form for payroll checks, you use a generic background form to align the fields. When the checks are actually produced, you place pre-printed forms in the printer and do not print the background form itself. If you are not using pre-printed forms, you place blank paper in the printer and print both the data and the background form.

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

12. Close preview mode and return to the **Form Templates** screen. We will revisit preview mode once we have some objects to manipulate.

    The Objects grid is where the fields that are to be placed on the form are selected. You can select as many fields as you need. You can use row and field modifiers as necessary to select the specific fields you need.

13. In the **Object Type** column on the first blank row in the grid, select the popup button to display a list of the valid object types.

    As you can see, there are several object types that we can use for a form template. The template we are currently working on will be using field objects. We will take a look at other object types in a future lesson.

14. Select the **Field** object.

15. In the **Object Name** column, click the popup button to display a list of the fields in the Personnel Management module. Select the **Full Name** field.

    The Caption column is automatically set to the caption currently associated with this field. (In the case of the Full Name field, the caption is set to Full Name.) This can be changed, if desired, but we have no need to make a change at this time, so just leave the field as is.

    The Left and Top fields are set to -1 to let the system know that these coordinates need to be calculated. This calculation will happen when first going into preview mode or when saving. The Width and Height fields contain the width and height of the field in pixels. We'll learn more about these attributes later.

    To save you some time, here is a list of the rest of the fields needed for our form.

16. For **Object Type,** select **Field** and select the following **Field Names**:

    Address 1
    Address 2
    City
    State
    Zip Code
    Contact 1 Name
    Contact 1 Relation
    Contact 1Address 1
    Contact 1Address 2
    Contact 1City
    Contact 1State
    Contact 1Zip

17. Select the **Preview** button.

    The names of the fields you have placed on the form are listed in the Object dropdown. The fields themselves are listed down the left side of the form, but that isn't where we need them to be. We need to place the field objects into their respective positions on the form, which is a task for the next lesson.

18. Remain in preview mode and continue with the next tutorial.

Tutorial 7.2 – Using Preview Mode

In the previous lesson, we used preview mode to take a peek at what our form template looked like. Now we are going to use it to actually move some of the objects you have placed on the form template.

1. Select **Preview** to view our form template in preview mode if you have not already done so.

   Let's start by using the mouse to drag an object.

2. Click on the **Full Name** field to activate it. Then click and drag it down to its respective place on the PDF form.

   When you moved the Full Name field, the caption did not move with it. There is actually a way to have the field and its caption move together if you choose. Let's try it.

3. First, move the **Full Name** field back down to where it used to be, lined up with the **Full Name** caption. Click in the empty area off to the right of the **Full Name** field to deselect it.

4. This time, click on the **Full Name** field using the right mouse button.

   Both the Full Name field and its caption are now highlighted.

5. Click and drag the **Full Name** field and its caption so that once again, the field is placed in its proper location on the form.

   You will notice that the caption is overlaying the text for that field on the form. We will remove all captions once we have all of our fields further down the road.

   Now that the Full Name field has been moved, you can see that we have some work ahead of us, moving each field to where it belongs. We can make this process a bit faster by moving more than one object at a time.

   The trick to dragging multiple objects is to select them all first. Multiple objects are selected by clicking on them while holding down the CTRL key. With the Field object you can automatically select its caption as we have seen by right clicking on the field. This time let's do the same thing by using the CTRL key with the Name field for our emergency contact.

6. Click on the **Name** field and then hold down the CTRL key and click on the caption for the Name field.

   Both the field and the caption are selected. But did you know that this works with multiple fields and captions as well?

7. While still holding down the **CTRL** key, select the **Relation** field and its caption.

8. Now that these fields and captions are selected, move these fields so that the **Name** field and its caption are properly placed on the form. As you can see, the **Relation** field and caption are almost where they should be, but still require a bit of adjusting.

   Sometimes, in an operation such as this, the mouse can be difficult to use. It can seem impossible to get the objects to move just one pixel and suddenly your normally supple

wrist feels like it has a cast on. So, People-Trak provides a "nudge" feature. Nudging allows you to use keystrokes to move an object or a collection of objects one pixel at a time. Here is how it works.

9. Select the **Relation** field and its caption. Now hold down the **CTRL** key and then press the **UP ARROW** key to nudge the objects up. Now press the **DOWN ARROW** key to nudge the objects down. To move left and right, use the **LEFT** and **RIGHT ARROW** keys.

   You can use this method to move objects into the precise location you desire without "wrist lock".

10. Now position the rest of the fields.

11. Close preview mode.

    We don't need the captions on any of our fields because the form itself already has the captions on it. All we need to do is clear the captions for all our fields.

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

13. Click the **Preview** button.

    Now the form looks much better.

14. Close preview mode.

    All of the moving tasks that you just performed were recorded in the object's property settings. In a future lesson we will take a look at how to see these properties for each object on the custom screen. But before we do that, let's see what our form template looks like as a form document.

15. Continue with the next tutorial.

Tutorial 7.3 – Produce a Form Document

Now that we have our form template created, we are ready to produce the output form.

1. On the **Documents** menu, select **Forms**.

2. On the Tool Bar, click the New Form button to create a new document.

   The Forms screen is displayed.

3. In the **Document Name** field, enter **Emergency Contact Form** and place the document in any desired **Explorer Category**. Set the **Category** field to **Personal.**

4. In the **Form Name** field, click the popup button to display a list of the available form templates. Select **Emergency Contact Form**.

5. On the **Tool Bar,** click the **Run Form** button to run this form.

   Since a query was not specified, an Emergency Contact Form is generated for each employee, and the form for the first employee is displayed in the Document Viewer. You can move between the records using techniques you have learned before.

6. Close the **Document Viewer** and the **Forms** screen, saving your changes.

7. Close the **Explorer**.

   Output forms can also be produced when editing records just like letters and other documents.

8. Open **Donald Stern's** record and remain on the **Personal** screen.

9. On the **Category Bar**, click the **Category Documents** button.

   The Documents for Personal Category screen is displayed.

   The Select Group is defaulted to Current Record, so all we need to do is select our form.

10. Click on the **Document Type** column header to sort the documents by type. Within the forms that show up, select the **Emergency Contacts** Form we just created.

11. Click the **Run** button to run the form for the current record.

    The form will be produced for Donald Stern and displayed in the Document Viewer. We could have just as easily selected Use Group and produced a form for each employee in the group.

12. Close the **Document Viewer**.

13. Close the **Documents for Personal Category** screen.

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

15. Continue with the next tutorial.

Tutorial 7.4 – Create a Form Template 2

You have seen how to create a form template based on a form image. You can also create a form template for reporting purposes. These form templates may or may not use a form image. In our example, we are going to create a form template that includes employee skills.

1. On the **Templates** menu, select **Form Templates** and create a new form template.

2. In the **Form Name** field, enter **Employee Skills** and select **Training/Competency** for the **Category** field.

3. Leave the **Paper Size** field set to **Letter**.

4. In the **Margins** field, enter **0.25**, which will create a ¼ margin around the whole form.

   Let's start adding objects to our form template. The Border object allows you to create a nice heading and border for your form template. Let's add one to our form template.

5. In the **Object Type** column on the first blank row in the grid, select the popup button to display a list of the valid object types.

6. Select a **Border** for the first object.

   The Caption defaults to the name of your form but can be overridden, if you choose.

   Now, let's add a frame and fields for the employee information.

7. Add a **Frame** object with a **Caption** of **Employee Information.**

8. Add the **Employee ID** and **Full Name** fields below that.

   Next, we will add the skills grid.

9. Add a **Grid** object and use the popup in the **Object Name** column to select the **Skills Grid.**

10. Click **Preview** to take a look at our form template.

    We definitely need to do some rearranging and resizing before using our template in a form. First of all, the Skills grid is too narrow. Let's increase its width to fit within our form borders.

11. Either select **Grid –Skills Grid** in the **Object** dropdown or click on the **Skills** grid to activate it.

12. Now move the cursor to the right edge of the grid. When the cursor crosses the right edge, it will change to a left/right arrow. With the left/right arrow displayed, hold down the mouse button and carefully drag the right edge of the grid to the right. We do not want to move the grid; we want to make the grid wider.

13. Increase the width of the grid until it fits just within the borders of the form template.

    Chances are that the column headers on the grid may need to be resized after our last adjustment.

14. Click in the header area of the **Comment** column of the grid, which will highlight that header. Hover over the column separator line between that column and the **Acquisition Date** column. The cursor will change to a left/right arrow. Click and hold the mouse button down and drag the column to the right until the **Acquisition Date** column has expanded to a size that accommodates the heading text.

15. Reselect the whole grid and move it down the form so that it is placed directly under the frame object that includes the **Employee ID** and **Full Name** fields.

    You may have noticed when moving the grid, it stayed within the margins set by the border. Let's take a closer look at this.

16. Select the **Skills** grid for activation. With your mouse, move the grid a bit past the right border of the form template and release it.

    Immediately, the Enrollment grid is "snapped" back into the margins set by the form border. Within form templates, there is a snap to edge feature that aligns objects to the left and right margins.

    Our last grid modification will be decreasing the number of rows within Object Properties.

17. Select the **Skills** grid and press the **F1** key to display the **Object Properties** screen.

    Take a look at the Height field and note the number of rows that our grid has.

18. Change the **Height** to **10** and click **Apply** to apply the change. Click anywhere off the grid to be able to see it again.

    Our grid is a smaller size and is exactly how we want it for our form. Let's take a look at how changing the properties of a field object are just as easy as changing grid object properties.

19. Select the **Full Name** field and press the **F1** key to display the **Field Object Properties** screen.

20. Record the value of the **Top** field and close **Field Object Properties**.

21. Use your mouse to drag the **Full Name** field towards the top of the form.

22. Press the **F1** key to display the **Field Object Properties** screen again.

    Note that the value of the Top field has been updated to reflect the movement of the object. To restore the field to its original place, simply update the coordinate back to the value you recorded.

23. In the **Top** field, enter the number you recorded. Click the **Apply** button to apply the change. Make any necessary adjustments to move it back into place.

24. Close **Preview** mode and the **Form Templates** screen, saving your changes.

25. On the **Documents** menu, select Forms. On the **Tool Bar**, click the **New Form** button to create a new document.

26. In the **Document Name** field, enter **Employee Skills** and place the document in any desired **Explorer Category**. Set the **Category** to **Training/Competency**

27. In the **Form Name** field, click the popup button to display a list of the available form templates. Select the **Employee Skills** template.

28. On the **Tool Bar**, click the **Run Form** button to run this form.

    You can see how easy it is to create and edit a very complex form with any information available in People-Trak.

29. Close the **Forms** screen, without saving your changes.

30. Continue with the next tutorial.

Tutorial 7.5 – Create a Form Template 3

Now that we have learned about the many features used to create and edit form templates, we can put our skills to use while building a form template that uses a complex background form with multiple fields that need to be populated.

1. Using what you have learned in prior lessons, create a new form template.

2. In the **Form Name** field, enter **Application for Employment**.

3. In the **Category** field, select the **Personal** category.

4. Leave the **Paper Size** field set to **Letter** and the **Print Form** check box selected.

5. In the **Margins** field, enter **0**.

6. Click the **Select Form** button to display the **Select File** screen.

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

   To save time, we will start you off with the first three field objects that need to be added to the Objects grid.

8. For **Object Type**, select **Field** and select the following **Field Names**:

   Former Employer
   Employment Start Date
   Employment End Date

9. Click the **Preview** button.

10. Using what you have learned in prior lessons, move the field objects into their respective places on the form.

    As you can see, there are more field objects that need to be added to the Object grid, not to mention all of the moving around and resizing that will need to be done. We have some tedious and time consuming work ahead!

    Let us spare you the extra work as we move on to the next tutorial, which will provide an alternative to the drag and drop process.

11. Close preview mode without saving and continue with the next tutorial.

Tutorial 7.6 – Create a Form Template 4

As we just witnessed, dragging and dropping multiple objects can get a bit out of control. In this lesson, you will see how using a PDF form that has been edited to accommodate People-Trak fields makes creating a form template that much easier.

1. Using what you have learned in prior lessons, create a new form template and name it **New Application for Employment**.

2. In the **Category** field, select the **Personal** category.

3. Leave the **Paper Size** field set to **Letter** and the **Print Form** check box selected.

4. In the **Margins** field, enter **0**.

5. Click the **Select Form** button to display the **Select File** screen.

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

7. Click the **Preview** button and take a look at the form so far.

   Does this form look familiar to you? It should. As you can see, the form we used in the last tutorial has been edited in such a way that the Previous Employment fields are now one large blank area. We will use this to our advantage.

8. Close **Preview** mode.

9. Add a **Grid** object and use the popup in the **Field Name** column to select the **Employment History** grid.

   The fields in that grid are automatically filled in on the rows below.

10. Click the **Preview** button.

11. If the **Employment History** grid is not already selected, select it for activation and move and position the grid so that it fits within the available blank space of the Previous Employment area.

    Voila! We saved a bunch of time by not moving around fields and captions and our form looks pretty good with the grid we added. Now to see what our masterpiece looks like when it is run as a form.

12. Close **Preview** mode, saving your changes.

13. Close the **Form Templates** screen, saving your changes.

14. On the **Documents** menu, select **Forms.**

15. On the **Tool Bar**, click the **New Form** button to create a new document.

    The Forms screen is displayed.

16. In the **Document Name** field, enter **New Application** and place the document in any desired **Explorer Category**. Leave the **Category** field set to **User**.

17. In the **Form Name** field, click the popup button to display a list of the available form templates and select the **New Application for Employment** form.

18. On the **Tool Bar**, click the **Run Form** button to run this form.

19. Close the **Forms** screen, without saving your changes.

20. Exit **People-Trak**.

21. This concludes this tutorial and lesson.

Notes