

Extension Course -9005

Introduction to Process Automation

Version 9.0

Information in this document is subject to change without notice and does not represent a commitment on the part of Technical Difference, Inc. The software product described in this document is furnished under a license agreement or nondisclosure agreement. The software and this documentation may be used or copied only in accordance with the terms of that agreement.

All names of companies, products, street addresses, and persons are part of a completely fictitious scenario and are designed solely to document the use of People-Trak. Similarities to real companies, products, addresses, or persons are purely coincidental.

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

(C) Copyright Technical Difference, Inc., 2014

Technical Difference, Inc.
5256 S. Mission Road #210
Bonsall, CA 92003
(800) 273-3760
(866) 693-4869 (fax)

www.people-trak.com

(Revision 01/01/2014)

Contents

Alarms	1
Set Alarm	1
Alarm Frequency	1
Alarm Notification	1
Schedule Triggers	3
Schedule Triggers	3
Details Tab	3
Conditions Tab	4
Action Tab	4
Alert Triggers	7
Alert Triggers	7
Details Tab	7
Conditions Tab	7
Actions Tab	8
Activating and Deactivating Triggers	8
Inbox	9
Inbox	9
Running a Scheduled Item	9
Running a Process	9
Running a Document	9
Showing Alarms	9
Postponing a Scheduled Item	9
Showing Your Tasks or All Tasks	10
Granting Access to All Items	10
Lesson 1 Alert Triggers and Alarms	11
Tutorial 1.1 – Setting Alert Conditions	12
Tutorial 1.2 – Sending Email	14
Tutorial 1.3 – Using Alarms	19
Lesson 2 Schedule Triggers	21
Tutorial 2.1 – Define Schedule Trigger Conditions	22
Tutorial 2.2 – Assign Document Tasks	24
Tutorial 2.3 – Set an Alarm and Send a Message	27
Tutorial 2.4 – Assign Multiple Tasks	29

Notes

Alarms

Set Alarm

The Set Alarm tool is a new feature that enables you to set date and time based reminders. People-Trak provides an internal alarm system. You can manually set alarms for yourself or another user for any future date and time using the Set Alarm option on the Tools menu. When an alarm time is reached, the alarm text is automatically displayed. If you are not in People-Trak when the alarm is activated, it will be displayed upon your next login.

The alarm will appear in the Inbox of the specified user on the date for which the alarm is set. The user can then view the alarm before the alarm is actually activated.

The Set Alarm screen is used to define the who, when and what settings for the alarm.

Alarm Frequency

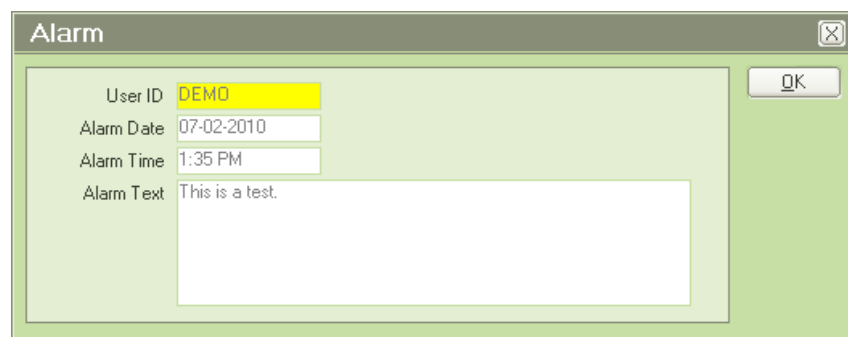
The alarm engine in People-Trak checks the status of alarms every so many minutes. It is not meant to be precise, so you should not set crucial appointments by the system. Each user can set the frequency with which alarms are checked. You can check and set this interval using the User Setup option on the Setup menu.

The Alarm Frequency field defines how often alarms are checked for this user. This value is normally set to 5 so that alarms are checked every five minutes. Use the popup button to display the other alarm frequencies. If you do not want alarms popping up all the time, either do not set them, ask other users not to set them for your user name, or increase your interval to 60 minutes.

The Alarm Frequency setting also controls how often the Inbox counter is refreshed. This counter shows how many items you have in your Inbox and is displayed below the Inbox icon on the Organizer Shortcut Bar. If the Alarm Frequency is set to 5 minutes, the Inbox counter will be updated every 5 minutes with the current number of items in your Inbox.

Alarm Notification

When you receive an alarm, it will look similar to the following, with the appropriate field values displayed.



The screenshot shows a dialog box titled "Alarm" with a close button (X) in the top right corner. The dialog contains the following fields:

User ID	DEMO
Alarm Date	07-02-2010
Alarm Time	1:35 PM
Alarm Text	This is a test.

An "OK" button is located in the top right corner of the dialog box.

Notes

Schedule Triggers

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

Schedule Triggers

The Scheduler feature has been rolled into the Schedule Triggers feature. There is no longer a wizard to build the schedule.

Schedule triggers are a powerful tool that allows you to schedule actions for automatic execution, such as sending an email to an employee or someone outside the company, assigning a task and sending a message or an alarm. Actions can be scheduled using a range of frequencies along with a start date.

Schedule triggers are based on specified points in time. When the time is met (and the trigger has not already been executed on that date), the trigger is executed and its associated actions are taken. Schedule triggers are tested to see if their conditions are met when logging into People-Trak, switching between modules and executing NightRun.

The Schedule Trigger screen provides a list of the schedule triggers on the left and a data entry area to the right. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of schedule triggers. The Schedule Triggers process uses a three-tabbed screen as described below.

Details Tab

The Details tab is used to name the trigger, assign it to a category, and define the Last and Next Execution dates.

The Last Execution Date is the date the schedule trigger was last executed. This date is updated to the current date by the system whenever the trigger is executed and is for display only.

The Next Execution Date is the date the schedule trigger will next execute. This date is updated by the system whenever the trigger is executed and is based on the value in the Frequency field. For example, if the Last Execution date is 7-31-09 and the Frequency is Monthly, the Next Execution date would be 8-31-09, one month later.

Note: If you change the conditions under which a schedule trigger is executed, you will need to clear the Next Execution field if it has a date in it. The next execution will then be done according to your new conditions.

Conditions Tab

The Conditions tab is used to define the conditions by which the schedule trigger will be executed such as frequency and starting date.

The frequency that the schedule trigger will be executed can be one of the following values:

Daily: The trigger will be executed each day. If you set the Start Date field many days in advance, the trigger will not execute until that day.

Weekly: The trigger will be executed each week on the weekday that matches the Start Date field.

Monthly: The trigger will be executed each month on the day of the month that matches the day of the Start Date.

Quarterly: The trigger will be executed every three months on the day of the month that matches the day of the Start Date.

Annually: The trigger will be executed each year on the day of the year indicated by the month and day of the Start Date.

One Time Only: The trigger will be executed just once on the day specified by the Start Date field. After the trigger is executed, the Active check box is deselected to ensure the trigger is not executed again.

Every So Many Days: The trigger will be executed every “N” days beginning on the day specified by the Start Date field. The number of days “N” is specified in the Number of Days field.

The Start Date is the start date of the schedule trigger.

There will sometimes be a third field in the Conditions frame depending on the Frequency chosen. If the Frequency is Weekly, the Day of Week field displays the day of the week on which the schedule trigger will be executed. If the Frequency is Monthly, the Day of Month field displays the day of the month on which the schedule trigger will be executed. If the Frequency is Every So Many Days, the Number of Days field allows you to enter the number of days between schedule trigger activation.

Note: If you set the Frequency to Monthly and the Day of Month is 28 or higher, People-Trak assumes that you want to run the report at the end of every month. This is required in the event that you have a Start Date of March 31 because not all months have 31 days.

Action Tab

The Actions tab is used to specify the actions to be taken when the schedule trigger conditions have been met. There can be more than one action to take, and the actions are executed in the order they are listed here. The following are the action types allowed for a schedule trigger.

- Assign Task
- Send Email
- Send Message
- Set Alarm

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

The Send Email action sends an email to the specified recipients. When you select this action, the following screen is displayed. This is the standard Send Email screen used throughout People-Trak.

The Send Message action sends a message to the specified user's Inbox.

The Set Alarm action sets an alarm for yourself or another user for a specified date and time. It functions just like using the Set Alarm tool.

For each action, the Detail:row button allows you to enter the detail for the action. When you click the button, a screen unique to that action is displayed for detail to then be entered.

Notes

Alert Triggers

Alert Triggers

An alert trigger is the tool best used to remind multiple users of significant upcoming or passed dates, or have them perform some action before or after that date. It allows you to send an email to an employee or someone outside the company, assign a task, send a message or set an alarm.

Just like schedule triggers, alert triggers are executed when the date is reached, but unlike the scheduler trigger, dates are not set by a calendar but by a formula consisting of date fields. Any date-oriented field, such as Exam Date, Birth Date, or Hire Date, may be used as the chief variable in this formula. Once you have selected this chief variable, you may decide on the amount of time before or after this variable, that the alert will take effect.

This formula is very different from the scheduler trigger because instead of merely executing the trigger on the selected date, alert triggers check every day to see if any record's fields meet the criteria defined in the alert trigger. Alert triggers are checked when logging into People-Trak, switching between modules and executing NightRun. If a record (or records) matches the criteria (and the trigger has not already been executed on that date), the alert trigger is executed and its associated actions are taken.

The Alert Triggers screen provides a list of the current alerts on the left and a data entry area to the right. A Menu Bar and a Tool Bar are provided to enable you to fully manage your list of alert triggers. There is no longer a wizard to build the alert. The Alert Triggers process uses a three-tabbed screen as described below.

Details Tab

The Details tab is used to name the trigger, assign it to a category, and define the Last Execution date.

The Last Execution Date is the date the alert trigger was last executed. This date determines when the alert trigger will next execute. For example, if this date is today's date, the alert trigger will be checked tomorrow. If this date is yesterday's date, the alert trigger will be checked today.

Conditions Tab

The Conditions tab is used to define the conditions by which the alert trigger will be executed. The If Today's Date Is field is composed of four separate fields that make up the alert trigger formula: amount, period, operator, and date. The bottom part of the tab uses the standard query grid.

The amount field is used to define how many days, months or years will be used in the equation. The period field contains three options: Days, Months or Years.

The operator field allows you to set when the trigger will execute: Before, After, Before Anniversary of and After Anniversary of. The Before/After variable will execute sometime

before/after the field variable. The Before Anniversary of/After Anniversary of variable will execute sometime before/after the anniversary of the field variable every year.

The date field is the fourth field in the Conditions formula. This field determines what date field will be checked in every record. You may track any date field in People-Trak, such as Birth Date, Next Exam Date, Hire Date, and Seniority Date.

In addition to the date field that is being checked, you can add further conditions using the standard query grid.

Additionally the Active Records Only checkbox allows you to specify whether or not you want only active records to be included in the alert trigger. Select the check box to only include active records in the alert trigger. Clear the check box to include all records in the alert trigger.

Actions Tab

The Actions tab is used to specify the actions to be taken when the alert trigger conditions have been met. There can be more than one action to take, and the actions are executed in the order they are listed here. The following are the action types allowed for an alert trigger.

- Assign Task
- Send Email
- Send Message
- Set Alarm

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

The Send Email action sends an email to the specified recipients. When you select this action, the following screen is displayed. This is the standard Send Email screen used throughout People-Trak.

The Send Message action sends a message to the specified user's Inbox.

The Set Alarm action sets an alarm for yourself or another user for a specified date and time. It functions just like using the Set Alarm tool.

For each action, the Detail:row button allows you to enter the detail for the action. When you click the button, a screen unique to that action is displayed for detail to then be entered.

Activating and Deactivating Triggers

For both schedule and alert triggers, there is an Active check box that allows you to specify whether or not the schedule trigger is active. Select the check box to make the trigger active or clear the check box to make the trigger inactive. When creating a trigger, this check box defaults to selected.

Inbox

Inbox

There is now one combined Inbox across all modules. The Inbox is now more easily accessible by using an Inbox shortcut on the Shortcut Bar. Below the Inbox icon on the Organizer Shortcut Bar, there is a counter that indicates how many items are currently in your Inbox. This counter is refreshed at the same frequency as the Alarm Frequency set in User Setup. The counter is also immediately refreshed when switching modules.

The Inbox is your centralized location to display messages and alarms as well as run tasks. Items that have effective dates will only show up in the Inbox once that date arrives.

Running a Scheduled Item

Scheduled items can be run from the Inbox at any time. The result is different for each scheduled item type.

Running a Process

If you run a process, the process is started just as if you selected the process from its corresponding menu. When the process is completed, you will be returned to the Inbox. The Status will be changed to “Completed”.

Running a Document

If you run a document, the document is generated just as if you selected the document from the Explorer. When the document has been generated, it is displayed within the Document Viewer. When you exit the Document Viewer, you will be returned to the Inbox. The Status will be changed to “Completed”.

Showing Alarms

An alarm will appear in the Inbox of the specified user on the date for which the alarm is set. The user can either view the alarm before the alarm is actually activated or wait for the alarm to be activated at the specified time.

When you have reviewed the alarm and click the OK button, you will be returned to the Inbox. The Status will be changed to “Read”.

Postponing a Scheduled Item

Items that appear in the schedule need not be run immediately. They can be left in the Inbox for days, if you choose. If the item does not need immediate action, you can postpone the item until another day.

When you return from the Select Date popup, the Effective Date column for the item will reflect the postponed date and the status will state “Postponed”. If you exit the Inbox and return, the item will not be listed because it is not effective for the current day.

Showing Your Tasks or All Tasks

If you have been granted access to all items, you can change the list of items between your personal list and the list for users using the My Inbox/Full Inbox button. If you have been limited to your own items, this button will not appear at all. This feature is very useful in multi-user environments to make certain that alerts are reviewed and scheduled items are performed. For example, if items are tightly scheduled within an organization and a particular user is absent or does not access the Inbox for a few days, the items in the Inbox would not normally be run. However, if at least one user is able to see all of the items in the Inbox, that user can ensure that items for other users are executed in a timely manner.

Note: This feature is only available for HR users.

Granting Access to All Items

To grant access to all Items, the Show All Users in the Inbox check box on the General would be selected if the user can see all items in the Inbox or cleared if the user can only see his or her items.

Lesson 1

Alert Triggers and Alarms

Lesson Contents

Tutorial 1.1 – Setting Alert Conditions	12
Tutorial 1.2 – Sending Email	14
Tutorial 1.3 – Using Alarms	19

This lesson covers how to create an alert trigger, define the conditions under which the alert trigger will be executed, and specify the actions to occur when those conditions are met. It also covers how to create an alarm.

Tutorials

Setting Alert Conditions: shows how to create an alert trigger and define the conditions under which the alert will be executed.

Sending Email: demonstrates how to use the Send Email action for the alert trigger.

Using Alarms: demonstrates how to create an alarm for specific user, date and time.

Tutorial 1.1 – Setting Alert Conditions

Alert triggers are used to notify people of events that are approaching or have passed based on any date within a People-Trak module.

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

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

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

The Login screen is displayed.

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

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

6. On the **Tools** menu, select **Alert Triggers**.

The Alert Triggers screen is displayed. The Alert Triggers screen uses three tabs to specify the details, conditions, and actions of each of your alert triggers. A list of the current alert triggers, a Menu Bar, and a Tool Bar are provided to enable you to fully manage your alert triggers. Let's get started and create an alert trigger.

7. On the **File** menu, select **New Alert Trigger** or on the Tool Bar, click the **New Alert Trigger** button to start a new alert trigger.

A default name is assigned. The name is NEW-#, where “#” is the next available, unused number.

8. Change the name of the trigger to **Birth Date Alert**.
9. For the **Category** field, select **Personal**.

The next field in the Details section is the Active check box. This check box is automatically selected when the trigger is first created. It means that this trigger will be checked each day. If at some point you wish to deactivate the trigger without deleting it, you can simply clear this check box. This is normally done when a trigger that has been in production is being changed. While a trigger is being changed and tested, you may not want the partially completed trigger to be executed. To prevent this, deactivate the

trigger while the trigger is being updated and reactivate the trigger when you are ready to test it and use it.

10. Keep the **Active** check box selected.

For alert triggers, the next field, Last Execution, is very important. When an alert trigger is initially created, this date determines when the trigger will next execute. For example, if you set the trigger to today, it will indicate that the trigger should first be checked tomorrow. If you set the date to yesterday, the trigger will be checked today. Since we want to test our trigger, we either need to set the date to yesterday or leave it blank. We'll set the date to yesterday for our demonstration.

11. In the **Last Execution** field, enter yesterday's date.

12. Click the **Conditions** tab.

Alert trigger conditions place a date from a record in an equation. For example, you might wish to determine if today is five days prior to an employee's birth date. Or, you might wish to determine if today is ten days since an employee was hired. The condition is made up of four fields: the amount, the type of period (days, months, and years), the operator, and the field to compare. We'll build the birth date alert indicated above.

13. In the **If Today's Date Is** field, set the amount field to **5**. Set the period type to **Days**.

Now the operator is powerful, but a little tricky. Pay attention to this. We wish to determine if today is five days prior to the employee's birth date. So, you might decide to use the Before operator. However, the employee's birth date was between 20 and 50 years ago. Today cannot be prior to the birth date unless the employee has not yet been born. You need to use the Before anniversary of operator that compares today's date to the employee's birth date in the current year. If you wanted to specify an alert for just after an employee's birth date, you would use After anniversary of. Otherwise, you would be specifying an enormous number that would only be relevant to an employee born in the specific year in which you made the calculation for the number of days.

14. Select the **Before anniversary of** operator. Now, in the fourth field, select the **Birth Date** field. The condition should now read as follows:

**If Today's Date is 5 Days
 Before anniversary of
 Birth Date**

Before creating an action, we need to address another condition field. This is the Active Records Only check box. This field is important because you will normally keep inactive records in your company. For most triggers, you will not wish to be notified or take an action for an inactive record. In this birth date trigger, we are going to send an email reminder to the employees that one of the company holidays is their birthday. This is not an action that is relevant for a terminated, retired, or otherwise inactive employee.

15. Select the **Active Records Only** check box to limit this alert to active records only.

You can also use the standard query grid to add further conditions. We won't be using the query grid in our example.

16. Continue with the next tutorial.

Tutorial 1.2 – Sending Email

Now that you have the conditions of the alert trigger defined, you are ready to specify the actions that are to occur when those conditions are met.

1. On the **Actions** tab, click the popup button to display a list of the available actions.

You will see the list of actions available.

Alert triggers do not run when a record is open or when data entry is occurring. In fact, alert triggers can run at night when no one is actually logged in to People-Trak. So, actions that imply or require user interaction are not listed. You cannot display a screen or message.

In our birth date example, we are going to send an email to the employees with upcoming birthdays and also an email to their supervisors.

2. Select the **Send Email** action.
3. When you selected the **Send Email** action, the cursor moved to the second row. Click back in the first row and then click the **Detail: 1** button to see the detail screen for this action.

The Send Email screen is displayed. This screen is the same as the one that you have used before when sending email. We want to use a template for our email, so let's go create that right now and then come back here and use it.

4. Close the **Send Email** screen, and close the **Alert Triggers** screen.

You were not asked to save your changes because when you went into details for the action, the trigger was saved at that time.

5. On the **Templates** menu, select **Email Templates**.
6. On the **File** menu, select **New Template** or on the Tool Bar, click the **New Template** button. Name the template **Birthday Email for Employee**.
7. For the **Category** field, select **Personal**.
8. On the Tool Bar, click the **Edit Email Template** button and enter the following text:

You will be celebrating a birthday in the next week or so. This is a reminder of company policy that each employee receives his or her birthday as one of the assigned paid holidays. Enjoy your birthday and enjoy your day off.

If your birthday falls on a weekend, you have your choice of taking either Monday or Friday. You will need to notify your manager: ~F~ (insert Supervisor Name) of your decision prior to taking the day off.

9. Close the **Email Template Editor**, saving your changes.
10. Create another email template and name the template **Birthday Email for Manager**, placing it in the **Personal** category as well.

11. Edit the template and enter the following text:

Employee: ~F~ (insert Full Name), ID Number: ~F~ (insert Employee ID) has a birthday this week. Please be aware that the employee will be taking his or her birthday off. If the birthday falls on a weekend, the employee can choose either Monday or Friday. It is up to the employee to meet with you to determine which day works best.

Thank you,

~F~ (insert User Name from the System category)

12. Close the **Email Template Editor**, saving your changes. Close the **Email Templates** screen, saving your changes.

The emails we are going to send are very similar. We could create an email definition for one and then copy that. Let's do that.

13. On the **Administration** menu, select **Email Definitions**.

14. On the **File** menu, select **New Email Definition** or on the Tool Bar, click the **New Email Definition** button.

The new email definition is created.

15. In the **Definition Code** field, enter **Birthday Notification - Employee**.

We would like this email to always come from the Human Resources Manager, like the email definition you created in an earlier lesson.

16. In the **From Address Type** field, select **Position**.

17. In the **From** field, click the popup button.

The Lookup Position screen is displayed.

18. Click **Search**.

19. Select **1043 - Human Resources Manager**.

20. In the **Subject** field, enter **Birthday Notification**.

21. In the **Template** field, use the popup and select **Birthday Email for Employee**.

We won't add any attachments.

22. On the Tool Bar, click the **Save** button.

Let's copy this definition as a shortcut to creating the definition for the manager.

23. On the **File** menu, select **Copy Email Definition**.

A new email definition is created as a copy of the original.

24. Change the **Definition Code** to be **Birthday Notification - Manager**.

25. In the **Template** field, use the popup and select **Birthday Email for Manager**.

Done!

26. Close the **Email Definitions** screen, saving your changes.

Now we are ready to use these email definitions in the alert trigger we already created.

27. On the **Tools** menu, select **Alert Triggers** and then select the **Birth Date Alert** we have been working on.

28. On the **Actions** tab, open the details for the **Send Email** action.

We need to specify to whom to send the email.

29. In the **To Address Type** field, click the popup button.

As you learned earlier, the address type fields have several options. Using the Address Book would allow you to send this email to the same person all the time. You might want this if you have an employee designated as the “birthday guru”, but what if you want the email to go to the employee or the employee’s supervisor? In this case, you need to select the Field Substitution option.

In our example, we want to send the email to the employee who is about to celebrate a birthday, so we need to use Field Substitution.

30. Select **Field Substitution**.

31. In the **To** field, click the popup button to display a list of the email address fields in the Personnel Management module (essentially within the employee record).

There are several email fields available: one for each of the emergency contacts, one for the employee, one for the employee supervisor in addition to others.

32. Select **Email**, which is the email address field for the employee.

When the alert trigger is executed, it will check each employee for a coming birthday. If an employee does have a birthday (anniversary of the birth date) five days from now, that employee will receive an email. If there are multiple employees with birthdays, each employee will receive their own email message. Contrast this with what would happen if you had placed a single employee email address in the To field. That specified employee would have received all of the notifications, and that is not what we want, at least for this particular trigger.

33. Click the **Message** tab.

34. In the **Email Definition** field, use the popup to select **Birthday Notification - Employee**.

All of the fields are defaulted accordingly.

35. Click the **Attachments** tab.

If we had attached a document to our email definition, it would display in the Attach Document field as you learned in earlier training. You also learned that there were three

options available for Group Type: Current Group, Current Record and Use Query. When sending email from triggers, these options are more limited. For Alert Triggers, you have a choice of Current Record or Use Query; Current Group is not an option because there is no group available. For Schedule Triggers, you only have a choice of Use Query because no records are opened for that type of trigger.

36. Close the **Send Email** screen, saving your changes.

Now we'll add a second email so that we can also notify the employee's manager.

37. In the second action row, add a **Send Email** action, click back in that second row and complete the details for it as follows:

To Address Type	Field Substitution
To	Supervisor Email
Email Definition	Birthday Notification - Manager

38. Close the **Send Email** screen, saving your changes. Close the **Alert Triggers** screen.

In order for us to see our trigger work, we need to have some employees that have birthdays five days from now. Let's update two employees to have those dates.

39. Open **Donald Stern's** record and set the month and day of his **Birth Date** to the appropriate month and day five days from now. (For example, if today is February 1, set Donald's birth date to February 6.) Close **Donald's** record, saving your changes.
40. Repeat the above step for **Julie Carrington**.

Alert triggers are checked when logging into People-Trak, switching between modules or executing NightRun. The first time the alert is checked each day, the Last Execution field is set to the current date and that alert will not be executed again on that date. When we created our sample alert, we set the Last Execution field to yesterday. So, it will run the next time we log into People-Trak or change modules.

41. Switch to the **Safety Management** module. Any alert triggers in the **Safety Management** module will be checked. Now switch back to the **Personnel Management** module.

The trigger will be executed. The first group of emails are for the employees selected by the trigger. You should see Donald and Julie as the recipients (and anyone else who happened to be so lucky). The second group of emails are for the managers of those employees.

42. Now, return to the **Alert Triggers** process and select the **Birth Date Alert** trigger we have been working on. Note that the **Last Execution** field has been set to today's date. Close the **Alert Triggers** screen.
43. Now switch to the **Safety Management** module and back to the **Personnel Management** module again. Note that the trigger is not executed this time.

Alert triggers can also assign tasks as well as set alarms and send messages. We will take a look at those actions when learning about schedule triggers in the next lesson. For now, we will go on to the next tutorial, which will give you an understanding of how to set alarms manually, without triggers.

44. Continue with the next tutorial.

Tutorial 1.3 – Using Alarms

People-Trak provides a nifty internal alarm system. You can manually set alarms for yourself or for another user for any future date and time using the Set Alarm option on the Tools menu. When an alarm time is reached, the alarm text is automatically displayed. If you are not in People-Trak when the alarm is executed, it will be displayed upon your next login.

1. On the **Tools** menu, select **Set Alarm**.

The Set Alarm screen is displayed. The cursor is positioned in the User ID field. The User ID field is automatically set to the currently logged-in user (DEMO) and the Alarm Date is set to the current date.

You can actually set an alarm for any user.

2. In the **User ID** field, click the popup button to display a list of the available users. We'll keep **DEMO** (that's you) so that we can test the alarm quite readily.
3. You can specify any date in the **Alarm Date** field, but since we wish to test this alarm today, leave the date set to today.

You can specify any time in the Alarm Time field, but since we wish to test this alarm shortly, let's set the time to a few minutes from now.

4. In the **Alarm Time** field, click the popup button to display the **Select Time** screen.

The current time is defaulted, to the nearest 5-minute increment. We want the alarm to go ASAP, so we will leave the time as is. When you are setting a time further away, remember to get the AM/PM setting correct.

5. Click **OK** to select the defaulted time.
6. Now, enter the following text in the **Alarm Text** field:

So far, you have survived this training. Keep up the good work.

7. Click the **OK** button to close and save your alarm.

The alarm engine in People-Trak checks the status of alarms every so many minutes. It is not meant to be precise and you should not set crucial appointments or your oven by the system. Each user can set the frequency with which alarms are checked. You can check and set this interval using the User Setup option. Try that now, while we are waiting for the alarm to go off.

8. On the **Setup** menu, select **User Setup**. Click the **Preferences** tab and find the **Alarm Frequency** field.

This is how often the alarms are checked. This value is normally set to 5 so that alarms are checked every five minutes.

9. In the **Alarm Frequency** field, click the popup button to display the other alarm frequencies.

If you just do not want alarms popping up all the time, either do not set them, do not let other users set them for your user name, or increase your interval to 60 minutes.

The 1 minute option should only be used if absolutely necessary as it will slow system processing time. We are going to select that option because time is of the essence.

10. Select **1 minute**. Close the **User Setup** screen, saving your change.
11. If the **Alarm** screen has popped up, close it. If that screen has not yet popped up, open your **Inbox** and you can find the alarm there. Open the alarm from your **Inbox** and it will act just as if it popped up on the timer. Close the **Alarm** screen. Note that the alarm status is now **Read**. Close the **Inbox**.

If an alarm is set for a future date, it will not display in the recipient's Inbox until that date. As we just demonstrated, the alarm can be executed manually by opening it in the Inbox or the user can wait until the timer pops the alarm for him.

12. This concludes this tutorial and lesson.

Lesson 2

Schedule Triggers

Lesson Contents

Tutorial 2.1 – Define Schedule Trigger Conditions	22
Tutorial 2.2 – Assign Document Tasks	24
Tutorial 2.3 – Set an Alarm and Send a Message	27
Tutorial 2.4 – Assign and Execute Multiple Tasks	29

This lesson covers how to create a schedule trigger and define the conditions under which the trigger will be executed. It also covers how to use actions such as Set Alarm, Send Message, and Assign Task.

Tutorials

Define Schedule Trigger Conditions: shows how to create a schedule trigger and define the conditions under which it will be executed.

Assign Document Tasks: demonstrates how to assign document tasks to the schedule trigger. Also shows how to use a cluster report to simplify running multiple documents.

Set an Alarm and Send a Message: shows how to use the Set Alarm and Send Message actions.

Assign and Execute Multiple Tasks demonstrates how to assign multiple tasks to the schedule trigger as well as execute them from the Inbox.

Tutorial 2.1 – Define Schedule Trigger Conditions

Schedule triggers are similar to alert triggers but are based on a different type of condition.

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

The Schedule Triggers screen is displayed and is very similar to the Alert Triggers screen you just learned about. We can skip redundant details and get started.

2. On the **File** menu, select **New Schedule Trigger** or on the Tool Bar, click the **New Schedule Trigger** button to create a new schedule trigger.
3. Change the name to **My Scheduled Reports**.
4. Set the **Category** field to **Personal**.

The next field is the Active check box. This field works just like it does with alert triggers. If the check box is selected, the schedule trigger is active and will be checked each day. If the check box is not selected, the schedule trigger is inactive and will not be checked each day. The Active check box is automatically selected when a new schedule is created.

5. Leave the **Active** check box selected.

We will learn about the Last Execution and Next Execution date fields in a bit.

6. Click the **Conditions** tab.

Now we'll set a condition for the schedule trigger. Unlike alert triggers, which are based on a date within an employee (or applicant, trainee, etc.) record, schedule triggers are based on specified points in time. When that time is met, the trigger actions will be executed. For example, you might wish to schedule a series of reports to be run each month. Or you may wish to send an email to the benefits carrier with an attached report every month.

The condition is made up of three fields. The first two fields set the frequency and the start date for the schedule trigger. The third field, which is not always visible, indicates a special value based on the frequency selected. For example, if you select a monthly frequency, the third field will reflect the day of the month on which the trigger is to be executed. For a weekly frequency, the third field will indicate the day of the week on which the trigger is to be executed.

7. Set the **Frequency** to **Monthly**. Leave the **Start Date** set to the default of today's date.

Note that the third field labeled Day of Month is displayed and that the value is set to the day of the month associated with today. The actions associated with this schedule trigger will be executed each month on that day of the month. Before we move on to the actions, let's take a look at some other frequencies.

Note: If you set the Frequency to Monthly and the Day of Month is 28 or higher, People-Trak assumes that you want to run the report at the end of every month. This is required in the event that you have a Start Date of March 31 because not all months have 31 days.

8. Set the **Frequency** to **Weekly**.

The date is already set, so the third field labeled Day of Week is displayed. The value is set to whatever day of the week is associated with today.

9. Set the **Frequency** to **Daily**.

There is no third field. This schedule will be executed every day.

10. Set the **Frequency** to **One Time Only**.

Again, there is no third field. This schedule will be executed just one time on the date specified, and then its Active flag will be cleared so it will not be executed again.

11. Set the **Frequency** to **Every So Many Days**.

This time the third field is labeled Number of Days and the field is editable. You can define the number of days by putting in a value. The first period will start on the start date and every “so many” days, the trigger will be executed.

We are going to use the monthly frequency for our demonstration.

12. Set the **Frequency** to **Monthly** and leave the **Start Date** as today’s date.

13. Continue with the next tutorial.

Tutorial 2.2 – Assign Document Tasks

You have set the schedule conditions, so now it is time to specify the actions.

1. On the **Actions** tab, click the popup button to display a list of the available actions.

The list of actions is the same list available for alert triggers. That is because schedule triggers are executed very much like alert triggers and do not assume that data entry is in process.

The most commonly scheduled task is the running of a report.

2. Select an **Assign Task** action.

We will use this action to place a “ready to run” report in your Inbox.

3. Open the details for this action.
4. Since this is your schedule, put your User ID (**DEMO**) in the **User ID** field.

The Task Date is the date the task will be assigned and is supported by the Select Date and Date Variable popups. If the trigger to which this task is attached has a frequency of more than once, this task needs to be assigned more than once and date variables allow you to not have to update this date every time the task needs to be assigned. For example, if you always want the task to be assigned the same day that the trigger is executed, you would use the TODAY date variable for this date. There are times when you might want to use other date variables if you don't want the task assigned on the same day the trigger is executed. Using date variables gives you that flexibility.

5. In the **Task Date** field, use the **Select Date Variable** button to select **TODAY**.
6. Since we are going to schedule a report, set the **Task Type** to **Document**. Finally, in the **Task Name** field, click the popup button
7. Stay in the currently highlighted **Adhoc Reports** type. Select the **General** category in the list of categories in the lower left, and then select the **Alphabetic Employee List** document in the list on the right. Click **OK** to return that document to the **Task Name** field.

We have now scheduled a report.

8. Close the **Assign Task** screen, saving your changes. Close the **Schedule Triggers** screen.

Now we'll test the trigger.

Schedule triggers are just like alert triggers and are executed when logging into People-Trak, switching between modules and executing NightRun.

9. Switch the current module to **Safety Management** and then switch it back to **Personnel Management**.

Did anything happen? Are you sure? Nothing visible happened because the Assign Task action, like all alert and schedule trigger actions, does not have user visible components.

(The only reason you saw the emails in the last lesson is due to the email simulation feature. Had the emails actually been sent, you would have seen nothing happen.)

10. Open your **Inbox**. Now you can see what happened. A **Document** task has been added to your **Inbox**. Find the task and double-click on it. The employee list is run and displayed in the **Document Viewer**. Close the **Document Viewer**, and you are returned to the **Inbox**. Note that the task **Status** is now **Completed**.
11. Click the **Delete** button to delete this item from the Inbox. Close the **Inbox**.
12. On the **Tools** menu, select **Schedule Triggers**. Select the **My Scheduled Reports** trigger.

The Last Execution date has been updated by the system to today's date. The Next Execution date has been updated by the system to be one month from today based on the Frequency of Monthly that we assigned to this trigger. This trigger will not be executed again until that date.

If you ever need to change the conditions under which this trigger is executed, you will also need to clear this Next Execution date in order for the trigger to be executed using the new conditions. In our case, we want to add another action and execute the trigger again, so we need to clear the Next Execution date so we can execute the trigger again today.

13. Clear the **Next Execution** date so that the trigger will be executed again.
14. On the **Actions** tab, add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Document
Task Name	Birthday List by Date (in the General category)

15. Close the **Assign Task** screen, saving your changes. Close the **Schedule Triggers** screen.
16. On the **Setup** menu, select **User Setup**. Click the **Preferences** tab. To make the reports in your Inbox more obvious (and to prevent you from ignoring your Inbox); select the **Inbox on Login** check box. Close the **User Setup** screen, saving your changes.
17. On the **File** menu, select **Logoff** to logout of People-Trak without actually leaving the program. Then log back in.

Without any visible indicator, the schedule trigger was executed and two tasks were added to your Inbox. Because we displayed the Inbox on login, the Inbox will be displayed just as soon as the tasks are complete. (All of this will happen more or less instantly.)

18. Double-click on the first **Document** task. The report is run and displayed. Close the **Document Viewer**. Double-click on the second **Document** task. Again, the report is run and displayed. Close the **Document Viewer**.
19. Click the **Delete** button to delete each of these items from the Inbox. Close the **Inbox**.

This is pretty cool, but there were just two simple reports that ran in seconds. What if

there were 30 monthly reports and some took longer to run? In this case, the schedule trigger would be wonderful for scheduling and reminding, but falls short on convenience and timesaving. What can be done? We can create a cluster report. Let's do that now.

20. On the **Documents** menu, select **Cluster Reports**. Create a new cluster report and set the **Cluster Name** to **Monthly Cluster Report**. Set the **Explorer Category** to **General**, overriding the table if necessary and set the **Category** to **Personal**. On the **Documents** tab, add the two reports we listed individually in our trigger. These are both in the **General** category:

Alphabetic Employee List
Birthday List by Date

21. Close the **Cluster Reports** screen, saving your changes. Close the **Explorer**.
22. Return to the **Schedule Triggers** process and select the **My Scheduled Reports** trigger on which we have been working. On the **Actions** tab, delete the second **Assign Task** action. Then open the details for the remaining **Assign Task** action and change the document to the **Monthly Cluster Report** we just created, which is in the **General** category of **Cluster Reports**.
23. Close the **Assign Task** screen, saving your changes. On the **Details** tab, once again clear the **Next Execution** field so we can test our trigger. Close the **Schedule Triggers** screen, saving your changes.
24. Logout of People-Trak and then log back in. When the **Inbox** is displayed, there should be just one **Document** task displayed this time, and it is a cluster report. Run the report.

In the Document Viewer, you can see that this cluster report contains the same two reports we ran last time. This was much faster and more convenient.

25. Close the **Document Viewer**. Delete this item from the **Inbox** and then close the **Inbox**.
26. Continue with the next tutorial.

Tutorial 2.3 – Set an Alarm and Send a Message

There are two more actions that both alert triggers and schedule triggers can use. We will show how to use them in this tutorial.

1. On the **Tools** menu, select **Schedule Triggers**. Select the **My Scheduled Reports** trigger.

2. On the **Actions** tab, add a **Set Alarm** action and go into the details for that action.

The Set Alarm screen is displayed. Setting an alarm from a trigger is just like using the Set Alarm tool, which you learned about in the previous lesson.

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

The Alarm Date is used for an alarm just like you learned the Task Date is used for a task. We want the alarm to be set on the same day as the trigger is executed, so we will use the TODAY date variable.

4. In the **Alarm Date** field, use the **Select Date Variable** button to select **TODAY**.

The Alarm Time field is the time of the alarm and is supported by the Select Time popup. If you leave this field blank and the Alarm Date field is TODAY, the alarm will go off as soon as the trigger is executed.

5. Leave the **Alarm Time** blank so this alarm will go off as soon as the trigger is executed.

6. In the **Alarm Text** field, enter the following:

There are reports in your Inbox. All you need to do is open the Documents task and the reports will be run.

7. Close the **Set Alarm** screen, saving your changes.

8. Add a **Send Message** action and go into the details for that action.

The Send Message screen is displayed. This action simply sends a message to the specified user's Inbox.

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

10. In the **Message Text** field, enter the following:

Please call me after you review the monthly reports in your Inbox.

11. Close the **Send Message** screen, saving your changes.

12. Clear the **Next Execution** date so the trigger will be executed again today.

13. Close the **Schedule Triggers** screen, saving your changes.

Let's turn off having your Inbox shown on login.

14. On the **Setup** menu, select **User Setup**. Click the **Preferences** tab. Clear the **Inbox on Login** check box. Close the **User Setup** screen, saving your changes.

15. Log off and back in.

The alarm may not go off right away. Remember that the alarm engine in People-Trak checks the status of alarms every so many minutes, based on the Alarm Frequency setting for that user. To save some time, let's manually kick off your alarm. Just imagine that this alarm popped up while you were doing other work in People-Trak.

16. Open the **Inbox** and then open the **Alarm** task.

This alarm would tell you that you have reports to look at.

17. Close the **Alarm** screen.

18. Open the **Document** task.

The cluster report is run.

19. Close the **Document Viewer**.

20. Open the **Message** item, read it and then close it.

Simple as that. You can have as many actions as you need on triggers.

21. Close your **Inbox**.

22. Continue with the next tutorial.

Tutorial 2.4 – Assign Multiple Tasks

This tutorial will demonstrate the awesome capability that the Assign Task feature provides for executing a series of tasks without having to go back and forth between the Inbox and Organizer desktop.

Our goal is to create a schedule trigger that assigns a set of tasks to the HR Manager on a monthly basis. We will start by making some necessary changes to our trigger that already exists.

1. On the **Tools** menu, select **Schedule Triggers**. Select the **My Scheduled Reports** trigger.
2. Change the name to **Monthly HR Tasks**
3. Clear the **Next Execution** date so that the trigger will be executed again.
4. On the **Actions** tab, delete the **Send Message** and **Set Alarm** actions, as we won't need them anymore.

Let the tasking begin!

5. On the **Actions** tab, add an **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Create
Task Name	Standard Employee

6. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Edit
Task Name	Standard Employee

7. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Administration
Task Name	Adhoc Reports

8. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Link
Task Name	www.people-trak.com

9. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Document
Task Name	Alphabetic Employee List

10. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Activity
Task Name	Random Employee Selector

11. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Processing
Task Name	Other Compensation Batch

12. Add another **Assign Task** action. Set the details as follows:

User ID	<i>your user ID</i>
Task Date	TODAY (select using the Select Date Variable popup)
Task Type	Table
Task Name	City

13. Close the **Assign Task** screen, saving your changes. Close the **Schedule Triggers** screen.

14. Switch the current module to **Safety Management** and then switch it back to **Personnel Management**.

15. Go ahead and open our now full **Inbox**.

16. At the top of the list of items is a **Create** task using the Standard Employee workflow. Double-click on it.

The Create Employee screen is displayed with the Employee Source field set to Scratch.

17. Select **Close** and return to the **Inbox**.

18. Double-click on the **Edit** task.

The Lookup Employee screen is displayed for us to select a record to edit.

19. Select **Close** and return to the **Inbox**.

20. Launch and close the **Adhoc Reports** administration task, the **People-Trak link** task, the **Alphabetic Employee List** document task, the **Other Compensation Batch** processing task, and the **City** table task.

That's all there is to it! Scheduling and assigning tasks just made the start of the month much more efficient for our HR user.

21. Click the **Delete** button to delete each of these items from the **Inbox**.

22. Close the **Inbox**.

23. Exit **People-Trak**.

24. This concludes this tutorial and lesson.

Notes