

Extension Course -9006

Notes, Attachments, and Document Management

Version 9.0

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Notes

Category Notes

Category Notes

Each module provides a notes feature that allows you to record and track text-based notes and attach a variety of document types to the notes. You can attach Microsoft Word documents, Microsoft Excel spreadsheets, Adobe Acrobat PDFs, and virtually any other type of non-executable file.

Each primary data entry screen and sub screen in each module has a Category Notes button. When the Category Notes button is selected, the notes screen is opened and only notes assigned to that particular category can be viewed. For example, to view notes within the Personnel Management module that have been assigned to the Personal category, the Category Notes button would need to be selected from the primary Personal screen or any of the Personal sub screens.

The Notes screen includes the Note Details grid and the following buttons: Attach, Delete, Show and Scan.

Note: The Category Notes button can be turned off for a user by clearing the Notes check box in User Setup.

Note Details Grid

The individual notes are displayed in the Note Details grid. This grid contains the columns described below.

User

Indicates the User ID of the People-Trak user who created the note. This field is automatically assigned and is for display only.

Note Date

Indicates the date of the note. If you do not enter a note date, the date will be set to today's date.

Note Text

The text of the note. The first line of the note is initially displayed. If you wish to display or enter additional lines, use the multi-line editor popup button to display the entire text of the note.

Type

Indicates the type of file attached to this note, if any. If a note has an attachment, you can activate the attachment and start the product used to create or edit the attachment by clicking the Show Attachment button. For example, if you have attached a Microsoft Word document, the Type will be DOC or DOCX. You can then click the Show Attachment button, which will start Word and load the attached document.

Attachment Buttons

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

All Categories Button

You can display the notes for all categories by selecting the All Notes button located on the right hand side of the Notes screen. All fields on the All Notes screen are display only and cannot be modified. Notes can be sorted by any column using standard grid conventions. Simply click on the grid header for the column on which you wish to sort. The note rows will then be sorted in that order. The Show button is available when on a note that has an attachment, and allows you to show the attachment.

Working With Notes

Viewing the Entire Text of the Note

To facilitate navigation and rapid viewing, notes are initially presented as single lines in the notes grid. You can move through the rows on the grid using standard grid navigation conventions. If you wish to view the entire text of any note, simply position the cursor to the desired row and click on the multi-line editor popup button. The entire text of the note is displayed in the multi-line editor and may be edited.

If you just viewed the note or made updates you want to save, click the OK button to return to the Notes screen. If you made updates to the note but do not want to save the changes, click Cancel.

Showing Notes for other Categories

When selecting the Category Notes button on primary and sub screens, the notes for the category associated with the primary screen are displayed. You can display and edit the notes for other categories by selecting the appropriate primary or sub screen and selecting the Category Notes button located on that screen.

Deleting Notes

Notes can be deleted using the Delete Row option, which is available on the Edit menu and on the Tool Bar. When the Delete Row option is used, the entire note including any attachment is deleted.

Sorting Notes

When notes are first displayed, the notes are displayed in descending order by note date. Notes can be sorted by other columns using standard grid conventions. Simply click on the grid header for the column on which you wish to sort. The note rows will then be sorted in that order. You can also order the notes in any random order using the Row Up and Row Down buttons on the Tool Bar. Like other grids, note rows are stored back into the database in the order in which you last sorted them

In addition, you will notice that when the sort order is changed in one category, the sort order persists for the rest of the categories. The primary reason for sorting notes is for viewing and printing purposes.

Printing Notes

You can print the list of currently displayed notes at any time using the Print button on the Tool Bar. If you wish to print a particular list of notes in a particular order, select the appropriate category and sort the list the way you want. The note report will reflect the list as you see it.

Notes

Attachments

Working with Attachments

People-Trak provides a unique feature that enables you to attach files to your note records. These files can be retrieved and viewed at any later time.

Attachments do not Use Linked Files

The files that you attach to People-Trak are not stored as linked files. With linked files, you simply store the name and path to the original file. If the file is moved, deleted, modified or lost, the link is no longer valid and the attachment is lost. In addition, linked files are not secure. A linked file that is located by any user can be opened and read at any time. Linked files are not a satisfactory method of storing attachments.

How Attachments are Stored

With People-Trak, there is one attachment file for each attachment and that attachment file is stored in the database. The attachment is a copy of the original file, so you are not dependent on the original file. If the original file is lost or deleted, you will always have the copy associated with the applicable note record. Should you wish to export the attachment out of the attachments file, you can do so using the “Save As” feature of the product.

Attaching a File

The process for attaching files is the same process regardless of whether you are attaching Word documents, Excel spreadsheets, image files, or any other type of file.

If the note to which you wish to attach a file does not yet exist, add the note. If the note does exist, select the desired note row.

You are allowed one attachment per note. An attachment can only be added if there is no existing attachment for that note.

When a file has been selected, internal processing for the attachment is performed. A copy of the file is made, and the file is compressed and moved into the attachment file for the current record. The type of file is then added to the Type column of the grid.

Activating Existing Attachments

When you have attached a file to a note, the Type column was updated to indicate the type of file attached to that note. You can activate the attachment and view it within the applicable product by clicking the Show Attachment button. The applicable product (Word, Excel, an image editor, Adobe Acrobat, etc.) will be loaded and the attachment will be displayed.

In order to activate an attachment and use the product with which it is associated, you must have that product or a related product installed and functional. For example, if one user has attached a Microsoft Word document and you wish to read that document as an attachment, you must have Microsoft Word or an equivalent installed and functional on your computer. The applicable product is determined by the file associations on your computer. If you have associated Word documents with another tool or product, that product can be used to open the attachment.

If you activate an attachment and modify the document within the associated product, the attachment will not automatically be put back into People-Trak. This is because the process that is editing the attachment works completely independently of People-Trak. That product does not know that you wish to move the modified attachment back into People-Trak. If you wish to place a modified attachment back into the note record, you need to save the edited attachment to a file, delete the original attachment, and then attach the new file.

Deleting an Attachment

An existing attachment can be deleted from a note at any time. When an attachment is deleted, it is removed from People-Trak permanently. If you wish to export an attachment so that you can use it elsewhere, use the Export feature described in the next section. To delete an attachment, select the note with the attachment and click the Delete button. The attached file will be deleted from the database and the Type column for that note row will be cleared.

Exporting an Attachment

Files that have been attached to notes can be exported from the database for use with another product or for any other purpose. For example, if you have attached employee photographs and you wish to use them for an employee newsletter or an award, you might wish to export the image.

Notes and Attachments that Originate from Email

Notes and attachments can be automatically added from the Email feature.

The following fields on the Send Email screen are applicable for attachments.

To

The email address of the record that is to receive notes. When emails are sent in bulk, multiple email addresses can be listed. The email addresses are used to lookup the unique ID for the appropriate records so that the note can be added.

Subject

The subject of the email. The entry in this field is added as the first line of the note text in the formation shown below.

Email Subject: Subject

Template

If a template is being used, this is the name of the template. When the note is created, the template with appropriate field data merged becomes the text of the note. The template text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email.

Text

The text of the email becomes the text of the note. The email text is added after the first line that was composed of the email subject. Thus, when the notes are listed in unexpanded form, you can readily determine which notes were generated by email.

Attachment 1

If a file is being attached to the email, the same attachment will be added to the note. This field contains the name of the file that will be attached to the notes.

Attachment 2

If a file is being attached to the email, the same attachment will be added to the note. This field contains the name of the file that will be attached to the notes.

Attach Document

If a document is being attached to the email, the same document will be added to the note. This field contains the name of the document that will be attached to the notes.

Note: If multiple attachments are added to an email, there will be a note added for each attachment.

Add Email to Notes

A check box that allows you to specify whether or not the email and any applicable attachment will be added to the notes. Select the check box to add a note to the record associated with each email address in the To field. Clear the field to not add a note to the records. This check box is defaulted to selected if the Add Email to Notes check box is selected for the current module in Module Setup.

Note: If you are in a module whose key record does not have an email address associated with it, the record cannot have a note attached to it. For example, if you are in the Training Course module, the key record is the training course, which of course is not a person that can receive an email. Also, if one of the To recipients does not have a People-Trak record associated with it, such as in the case of a vendor, then no record exists to have a note attached to it.

Note Category

If the email is being sent to notes, this field determines the note category to which the note will be added. It is supported by the list of available categories. A note cannot be added unless a note category is specified. If the Add Email to Notes check box was defaulted to selected, this field is also defaulted to the category specified for the current module in Module Setup.

Notes

Document Management Module

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

Within the Document Management module, you have the ability to search across modules using one of the appropriate search tag fields.

Document Screen

ID and Name Frame

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

Search Tag 4 A user defined text field used to define search criteria for the document.

Document Frame

Document Category The category into which the document is to be placed. This category can be used to secure documents. A table that contains all of the existing organizer categories for the current module supports this field. You can only select a valid entry from the table.

Note: If the document originated from a note or archived document, this field will be display only and will reflect the category that was assigned to the note or archived document when it was created.

Document Creator Indicates the User ID of the People-Trak user who created the note. This field is automatically assigned and is for display only.

Document Date Indicates the date that the document was created. This field is automatically assigned and is for display only.

Document Text The text of the note. If you wish to display or enter additional lines, use the multi-line editor popup button to display the entire text of the note.

Note: This field will reflect the note text or the archived document description if it has originated from either of those sources.

Attachment Type Indicates the type of file attached to this document, if any. If a document has an attachment, you can activate the attachment and start the product used to create or edit the attachment by clicking the Show Attachment button. For example, if you have attached a Microsoft Word document, the Type will be DOC or DOCX. You can then click the Show Attachment button, which will start Word and load the attached document.

Attachment Buttons

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

Detail Button

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

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

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

Retention Months The number of months the document is to be retained for. The Expiration Date field is automatically derived from the date that has been entered in this field.

Expiration Date The date on which the attachment expires. This field is supported by the Select Date popup. The Expiration Date field is automatically derived from the date that has been entered into the Retention Months field, but may still be modified.

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

History Button

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

Action Date The date the action occurred.

Action Time The time the action occurred.

Action Type The comment showing the action that occurred. The comment can be one of the following:

- **Attached** A document was attached.
- **Deleted** An attachment was deleted.
- **Opened** An attachment was viewed.

Accessed By The User ID of the user that performed the action.

Notes

Document Management Features in Archive and Category Notes

Within Archived Documents and Category Notes, the implementation of Document Management, provides additional fields that are captured and fields that need to be defined for use within triggers and search criteria.

Output to Archive

Search and Retention

The Search and Retention frame on the Output to Archive screen includes the following fields.

Search Tag 1	A user defined text field used to define search criteria for the document.
Search Tag 2	A user defined text field used to define search criteria for the document.
Revisit Date	The date the attached document is to be revisited. This field is supported by the Select Date popup.
Revisit Text	The text associated with the Revisit Date. A multi-line editor popup is available for this field.
Retention Months	The number of months the document is to be retained for. The Expiration Date field is automatically derived from the date that has been entered in this field.
Expiration Date	The date on which the attached document expires. This field is supported by the Select Date popup. The Expiration Date field is automatically derived from the date that has been entered into the Retention Months field, but may still be modified.
Expiration Text	The text associated with the Expiration Date. A multi-line editor popup is available for this field.

Category Notes

Detail Button

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

Search Tag 1	The source ID, which is the ID of the record that the note was created in. For example, if a note was made in Donald's employee record, the Search Tag 1 would be his Employee ID which is 1006. This field is display only and cannot be modified.
Search Tag 2	The description associated with the source ID of the record that the note was created in. For example, when a note is created in Donald Stern's record, the Search Tag 2 will default to the

description, which is his name: Stern, Donald E. This field is display only and cannot be modified.

Revisit Date	The date the attachment is to be revisited. This field is supported by the Select Date popup.
Revisit Text	The text associated with the Revisit Date. A multi-line editor popup is available for this field.
Retention Months	The number of months the attachment is to be retained for. The Expiration Date field is automatically derived from the date that has been entered in this field.
Expiration Date	The date on which the attachment expires. This field is supported by the Select Date popup. The Expiration Date field is automatically derived from the date that has been entered into the Retention Months field, but may still be modified.
Expiration Text	The text associated with the Expiration Date. A multi-line editor popup is available for this field.

History Button

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

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

Lesson 1

Notes and Attachments

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This lesson covers how to use the notes and attachments feature provided with People-Trak.

Tutorials

Adding and Deleting Notes: shows how to add and delete notes.

Working with Categories: demonstrates how the note categories are used to organize notes based on the primary data entry screens.

Attaching a File: shows how to create and attach a file to a note.

Opening an Attachment: demonstrates how to open an attachment file using the software product that was used to create the attachment.

Deleting an Attachment: shows how to delete an attachment that was added to a note.

Tutorial 1.1 – Adding and Deleting Notes

The Notes screen is essentially a grid with some additional enhancements to support attachments and a large multi-line text box. In this lesson, we'll see how these enhancements work.

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 they are not, select the **Training** button.
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. Open **Donald Stern's** record.

The Personal screen is displayed. Notes within the Personal category are accessed by clicking the Category Notes button, which is the third button on the Category Bar. The Category Notes screen is available from virtually all of the primary data entry screens and sub screens in People-Trak.

Note: The Category Notes button can be turned off for a user by clearing the Notes check box in Security Setup.

7. Select a few of the primary screens and find the **Category Notes** button.
8. Return to the **Personal** screen and click the **Emergency** button.

The Emergency Contacts screen is displayed.

9. Find the **Category Notes** button. It is available here and on other sub screens as well.
10. Close the **Emergency Contacts** screen to return to the **Personal** screen. Click the **Category Notes** button.

The Notes for Personal Category screen is displayed with the notes in descending order by note date. As mentioned, the primary component on the screen is a grid, but this grid has some special features. The record for Donald Stern already has notes defined for the Personal category. Typically, you would add a new note by inserting a row at the top of the grid. For demonstration purposes let's see what happens when a note is added on the first blank row.

11. In the first blank row, click in the **Note Date** column.

You can enter today's date manually, click the Date popup button or use the Date Stamp feature. Let's use the Date Stamp feature.

12. Select **Cancel** to close the **Select Date** popup.
13. On the **Edit** menu, select **Date Stamp**.

Today's date is entered into the Note Date column.

Note: You can also invoke the Date Stamp feature by pressing F4. On a new note, if you add an attachment or enter the Note Text before entering the Note Date, the Note Date field automatically populates with today's date.

14. Press **ENTER** to leave the **Note Date** column.

The User column is automatically populated with the current user ID DEMO. The User is automatically assigned and is for display only.

15. In the **Note Text** column, enter the text **This is my first note** and press **ENTER**. The note is complete. If you want to enter a note for today's date, there is an even faster way to enter a note. Let's see how this works.
16. In the next blank row, click in the **Note Text** column and enter the text **This is my second note** and press **ENTER**.

The User and Note Date fields are defaulted for you and the note is done!

Now, let's see how to insert a row rather than just add a row at the bottom of the notes grid.

17. Click anywhere in the first row of the grid.
18. On the Tool Bar, click the **Insert Row** button to insert a row.

Note that the User field is completed just as before. Additionally, the Note Date is automatically populated with today's date. This time, let's enter a note longer than the one line we are shown. We could keep typing and have the note wrap or we could use the multi-line editor. Let's try the multi-line editor, which allows you to see all the text you are entering.

19. In the **Note Text** column, click the popup button to open the multi-line editor.

A Simple Editor screen is displayed. You can now type away for as long as you like. If you reach the end of the line, word-wrap will be performed and the cursor will jump to the next line. If you press **ENTER**, the current line will be broken and the cursor will jump to a new line. Try these now.

20. Type a sentence or paragraph that wraps. Then on the second line, press **ENTER** to start another new line. Add a few more lines with the **ENTER** key and make a nice long note.
21. When you are finished with your note, click **OK** to close the editor.

Only the first line of your note is displayed in the grid. If you wish to review the text of your note or to add more text, click the popup button to expand the note text area and view or edit the text.

The Notes screen has been designed to allow you to rapidly view the first line of each note relative to the other notes. If you wish to review the note in more detail (if the note has more detail), you need only click the popup button. In fact, you can actually browse your notes with the mouse. Try this.

22. Click in the **Note Text** column of the first row.
23. Open the editor, read the note text, close the editor. Click on the next line.
Open the editor, read the note text, close the editor. Click on the next line.
Open the editor, read the note text, close the editor.

You can use this technique to rapidly browse all notes for any record.

Now that we know how to add notes, let's see how to delete notes.

24. Click anywhere in the first row of the grid.
25. On the Tool Bar, click the **Delete Row** button to delete the current note.
26. Use **Delete Row** to delete the other notes you entered.
27. Close the **Notes for Personal Category** screen, saving your changes.
28. Continue with the next tutorial.

Tutorial 1.2 – Working with Categories

When we entered the notes in the last tutorial, the note category was the category of the screen from which the Category Notes button was clicked. Each primary data entry screen in People-Trak has a screen category associated with it.

1. In the **Screen** dropdown, select **Status**.
1. On the **Category Bar**, click the **Category Notes** button.

Unlike the Personal category, there are no Status notes for Donald Stern.

2. Enter a note using the techniques you just learned.
3. Close the **Notes for Status Category** screen, saving your changes.

Try a few other screens and their Category Notes buttons. Some categories may contain notes and others may not. If you would like to see the notes within a record, you can do so by selecting the All Notes button.

4. Select the **Personal** screen, and select the **Category Notes** button.
5. Select the **All Notes** button located to the right of the notes grid.

The All Notes screen is displayed. This screen is mainly used viewing and printing purposes, so all fields are display only and cannot be modified. You may have also noticed a Note Category column header listing the categories from which the notes came from.

In addition, this particular grid shares the standard operating conventions of other grids in People-Trak. This means that you can sort the grid using any of the column headers. We can demonstrate this by sorting our notes by category.

Note: Grid sorting can be turned off for a user by clearing the Grid Sorting check box in Security Setup.

6. Click the **Note Category** column header.

The grid is now sorted by category in ascending order.

Try selecting the different column headers to sort the notes in other ways.

These same sorting conventions also work within the category note screens. Let's take a look at how they work for the Notes for Personal Category.

7. Close the **All Notes** screen.
8. On the **Notes for Personal Category** screen, click the **Note Date** column header.

The grid is now sorted by date in ascending order.

Like other grids, note rows remain sorted in the most recently sorted order.

9. Close the **Notes for Personal Category** screen and open it back up again.

The grid is still sorted by ascending note date within that category.

Like in other grids, you can also order the notes in any random order using the Row Up and Row Down buttons on the Tool Bar.

10. Go ahead and use the **Row Up** and **Row Down** buttons to change the order of the notes.
11. Close the **Notes for Personal Category** screen, saving your changes and stay in Donald's record.
12. Continue with the next tutorial.

Tutorial 1.3 – Attaching a File

One of the more powerful features of the Notes screen is the ability to attach external files to your notes. These external files become an integral part of the record. Attachments can be added to any note. Let's add a note and then add an attachment to it.

1. In the **Screen** dropdown, select **Status** and select the **Category Notes** button.
2. Enter a new note and stay on that note row.
3. Select the **Attach** button located to the right of the notes grid.

This option displays the Select File screen that is used to select a file. We have created a simple Word doc that you can now attach to this note.

4. In the **PT9\SAMPLES** directory of your local People-Trak drive, select the **ATTACHMENT TIP.DOC** file.

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

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

5. In the **Note Text** field, add the following to your existing note and do not press **ENTER** so you stay on this note row:

This note contains an attachment that includes a valuable tip on attachments.

6. Continue with the next tutorial.

Tutorial 1.4 – Opening an Attachment

Once a file has been attached to a note, the file can be opened for viewing at any time.

1. Verify that the cursor is positioned to the note row containing the file you attached in the last tutorial.
2. Select the **Show** button located to the right of the notes grid.

The software associated with the DOC extension, typically Microsoft Word, is fired up and the attachment is loaded. This document is a copy of the original document and is stored in the ATTACH file under the appropriate enterprise folder.

Note: The attached file is intended to be for display only. If the attached file needs to be modified, do so outside of People-Trak. You will then need to delete the current attachment from the note and attach the appropriate file.

3. Close the attachment after reading the tip.

If you attach a file from a software product that you use, another user can only activate that attachment if the user also has that software product. For example, if you attach a word processing file (as we just did) from your word processor and another user has a different word processor, the other user might not be able to view the attachment. The Attachments feature is a very powerful feature, but it must be used with appropriate discretion. If your organization has standard word processors, spreadsheets, and other software products, there will be no problem.

4. Continue with the next tutorial.

Tutorial 1.5 – Deleting an Attachment

If a file has been attached to a note, you may need to delete it because it was attached in error or you need to attach an updated file to the note. Let's delete the attachment you added to the note.

1. Verify that the cursor is still positioned to the note row containing the file you attached in the last tutorial.
2. Select the **Delete** button located to the right of the notes grid

The Type column is cleared, showing that the attachment is now deleted from that note. If you had another file to attach to this note, you could do so now.

3. Close the **Notes for Status Category** screen, without saving.
4. Close the employee record, without saving.
5. This concludes this tutorial and lesson.

Notes

Lesson 2

Document Management 1

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Tutorial 2.3 – Defining Details for Archived Documents	30

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

Tutorials

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

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

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

Tutorial 2.1 – Note Attachment History

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

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

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

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

Donald Stern drivers license image

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

5. Select the **Attach** button.

The Select File screen is displayed.

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

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

8. Select the **History** button.

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

9. Close the **History** screen.

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

10. Select the **Show** button.

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

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

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

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

13. Select the **Attach** button.

The Select File screen is displayed.

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

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

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

16. Select the **History** button.

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

17. Close the **History** screen.

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

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

19. Continue with the next tutorial.

Tutorial 2.2 – Revisiting an Attachment

We have successfully added an attachment to Donald’s notes. Driver’s licenses aren’t valid forever, so let’s utilize a few of the category note features to make sure Donald’s information is kept up to date once his license expires.

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

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

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

While we’re at it, let’s go ahead and alert Donald and the HR department before the note reaches its revisit date.

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

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

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

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

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

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

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

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

Tutorial 2.3 – Defining Details for Archived Documents

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

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

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

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

Full Name
Hire Date
Source

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

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

7. We should see the employees that were hired between the start and end of the current month.
8. Run the report.
9. On the Tool Bar, click the **Output to Archive** button.

The Output to Archive screen is displayed.

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

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

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

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

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

Notes

Lesson 3

Document Management 2

Contents

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Tutorial 3.3 – Managing Documents with Triggers	39

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

Tutorials

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

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

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

Tutorial 3.1 – Creating a Document from Scratch

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

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

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

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

3. Click **Create**.

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

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

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

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

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

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

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

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

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

11. Select the **Attach** button.

The Select File screen is displayed.

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

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

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

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

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

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

15. Select the **History** button.

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

16. Close the **History** screen.

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

17. Select the **Details** button.

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

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

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

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

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

21. Continue with the next tutorial.

Tutorial 3.2 – Document Lookup Using Search Tags

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

18. In the **Search Tag 1** field, enter **1006**.

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Tutorial 3.3 – Managing Documents with Triggers

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

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

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

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

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

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

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

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

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

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

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

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

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

The two expired documents are returned to the results.

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

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

Repeat the same steps to delete the second expired document.

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

21. Exit **People-Trak**.

22. This concludes this tutorial and lesson.

Notes