HR Manager

Version 5.02

User Guide

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Contents

IMPORTANT NOTICE

Before you use Mitrefinch HR Manager we wish to stress the importance of keeping back-up copies of your programs and data.

We advise that you follow this rule:

WHENEVER YOU FIND YOURSELF WITH ONLY ONE GOOD OR UP-TO-DATE SET OF DATA OR PROGRAMS, COPY IT AT THE FIRST OPPORTUNITY.

At Mitrefinch we will happily give support and advice to every licensee of Mitrefinch HR Manager under maintenance contract, but it is **YOUR** responsibility to observe our rule on keeping back-ups.

CHAPTER 1

INTRODUCTION

1 Introduction

Welcome to the Mitrefinch HR Manager System - the human resource system that is used to store and manage all the personnel information required by your organisation, including personal and contract details, education and qualifications, pay details and organisational details.

Once your organisation's employee records have been entered into the system, you can use HR Manager to report on numerous aspects of the present and historical information, and make comparisons between data at different points in time.

Among other things, this versatile system can be used to display an automatic prompt when a diary entry is due, to generate reports and produce letters, and to view all employee information, at any point in time (past, present or future).

1.1 About this User Guide

This user guide provides detailed information about all HR Manager functions. Chapter 2, Installation, will not normally be required by anyone other than the system administrator.

Chapters 3-11 explain everyday usage of the system, such as adding and maintaining employee details, authorising requests, and using the diary, letters and reports features. This information will be required by most users of the system (supervisors, department managers etc.) on a regular basis.

Chapters 12-23 cover more advanced information that will explain to system administrators how the system can be customised to your own organisation's working practices, e.g., adding fields, maintaining system users and user profiles, and creating your own diary definitions and letter templates.

The three appendices also will only be useful for system administrators, listing the forms on the system and giving details of how the advanced features are used.

NOTE: Many of the options detailed in this user guide can be defined differently for each individual company. For example, some of the forms and tables pictured in this manual may have a different layout to the ones displayed on your screen. These differences are due to the fact that your system will have been tailored to suit the individual requirements of your organisation, whereas this manual details a standard HR Manager application.

If the form layouts and options do differ from those in this manual, do not panic, because the methods of accessing and using the functions are the same for every system.

1.2 How can I find out more about my system?

If you wish to find out which version of the software you are running, or where on your PC or network HR Manager is located, open the **Help** menu on the main form, and select **About**. The following information will be displayed:

The four 'info' buttons allow you to see more details about your HR Manager.

NOTE: You will find the Mitrefinch Report Writer manual extremely useful for explaining in detail how to create new reports, customised to your own requirements. You will also find lists of all standard fields and functions; these will be of use in several other parts of HR Manager, particularly when creating diary definitions and letter templates.

CHAPTER 2

INSTALLATION

2 Installation

HR Manager can only be run in Client/Server mode. In Client/Server mode, the data is stored on a database server, while the applications run on PC client machines which request all required data from the server. HR Manager is a 'fat client' solution, in that the majority of the processing is done on the client machine with a number of server-based optimisations.

The server databases supported are Interbase, MS SQL Server and Oracle.

At the time of writing, all Mitrefinch applications support current Microsoft Server operating systems. These include Microsoft Windows 2000 & 2003.

Clients can be Windows 95, Windows 98, Windows 2000, Windows NT or Windows XP.

2.1 Requirements

In order to run any Mitrefinch application, both client and server PC must have sufficient resources.

A client PC is defined as any which will be used to access any of the Mitrefinch applications. Mitrefinch cannot recommend or specify a particular make or model of PC as this is usually determined by individual customer purchasing policies/preferences etc.

While the applications will run on PCs of lower specification than the minimum detailed below, performance cannot be guaranteed, especially where information regarding other applications being used by the customer is not known. It is strongly recommended by Mitrefinch that the customer should use PCs in excess of the minimum specification. Customers are advised to use the best possible (budget permitting) to enable maximum future-proofing for further applications. At the time of writing the baseline specification in terms of processor speed is 3.0GHz, therefore any newly purchased PC would already be well in excess of the minimum processor requirements.

2.1.1 Server hardware

Recommended specification:

- Dual Xeon 2Ghz processor (1)

- 2Gb DDR RAM (2)
- 30GB hard disc space reserved for TMS application & data (3)
- Windows 2003 Server (4)
- Multiple SCSI 2 hard drives with RAID 5 (5)
- 1000MB network connection
- UPS Power Supply (6)
- Suitable backup device or storage solution (7)

Minimum specification:

- Single processor PIII (1)
- 1Gb RAM (minimum) (2)
- 2GB hard disk space (3)
- Windows 2000 Server operating system (4)
- EIDE hard drive (5)
- 100MB network connection
- Suitable backup device or storage solution (7)

1. The type of processor chip (e.g. Intel, AMD) is determined by the customer.
2. The memory in the server has a direct affect on the speed of the application for the user. 1Gb should be classed as a minimum.
3. The arrangement of the disk storage is at the discretion of the customer, determined by internal IT policies.

4. The operating system and database is again at the discretion of the customer, determined by their own preferences and licensing policies. It will be the responsibility of the customer to ensure that sufficient licences have been purchased to cover all users that will require access to the server and database. Mitrefinch does not hold any responsibility for the users/permissions details of the appropriate operating system.

5. This is optional and will be determined by customer's IT policy. RAID (Redundant Array of Inexpensive Disks) is a method of storing data on multiple hard disk drives for faster access, greater reliability or both. There are multiple 'levels' of RAID available, each designed for a specific kind of application.

6. An optional item, as the incidence of mains power supplies failing is low. Adding an Uninterruptible Power Supply (UPS) allows the server to perform a safe shutdown if the mains power supply fails.

7. A sufficient backup device must be available whether for an existing or a new purchase. Mitrefinch reiterate the responsibility for data backup remains with the customer.

2.1.2 Client hardware

Recommended specification:

- 3 Ghz CPU with 512Mb RAM (1)
- 100MB Network Connection
- SVGA monitor capable of 1024x768 32-bit colour
- More than 20% free hard disk space
- 2 free USB 2.0 (Universal Serial Bus) ports (if req'd)

Minimum specification:

- PIV 1 Ghz with 256Mb RAM (1)
- 100MB Network connection (if req'd)

- SVGA monitor capable of 800x600, 16-bit colour
- Windows 98SE, 2000 or XP
- At least 20% free hard disk space.

There is a basic requirement for minimum free hard disk space as specified above to enable the PC to function correctly (i.e. sufficient swap space available). Actual hard disk space requirements are minimal on a networked system as the applications will be installed and run from the server. In the case of a standalone system, there must be sufficient storage space available for the application (approx. 180Mb) and also data. For multi-user systems the PCs will obviously have to be networked.

1. Additional memory may be required depending on Operating system (OS) and database (DB) requirements.

2.2 Install from the CD-ROM

After the database client software has been set up on a machine, follow these steps to install HR Manager:

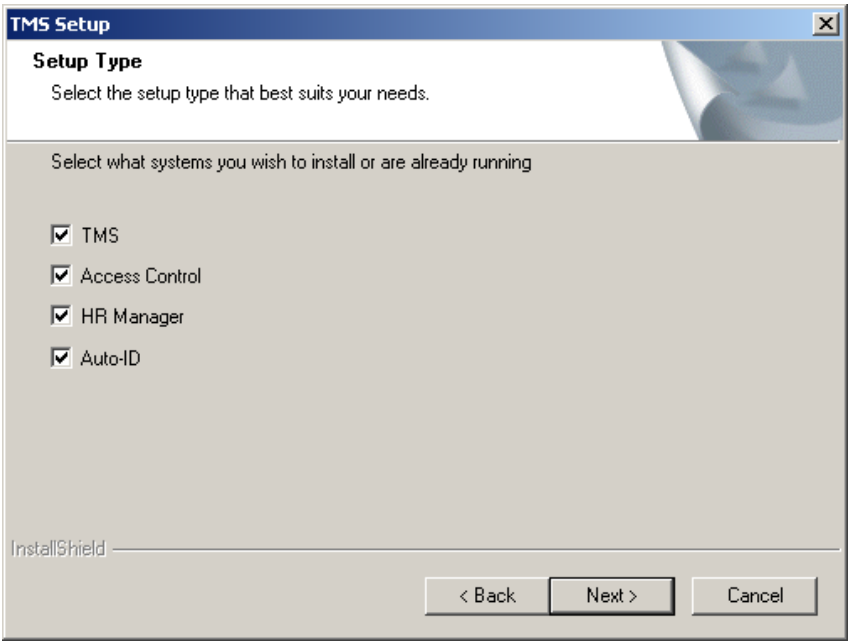
First, find a client machine with access to both the network drive that will contain the HR Manager program files and the machine on which the database resides. The machine should not already have a copy of the Borland Database Engine installed locally (unless this is the BDE that will be shared by all machines that will access the application). If it does, it will not be possible to install the 32-bit BDE to a network drive from this machine.

Ensure no applications that use the BDE are currently running in this machine; if they are, shut them down.

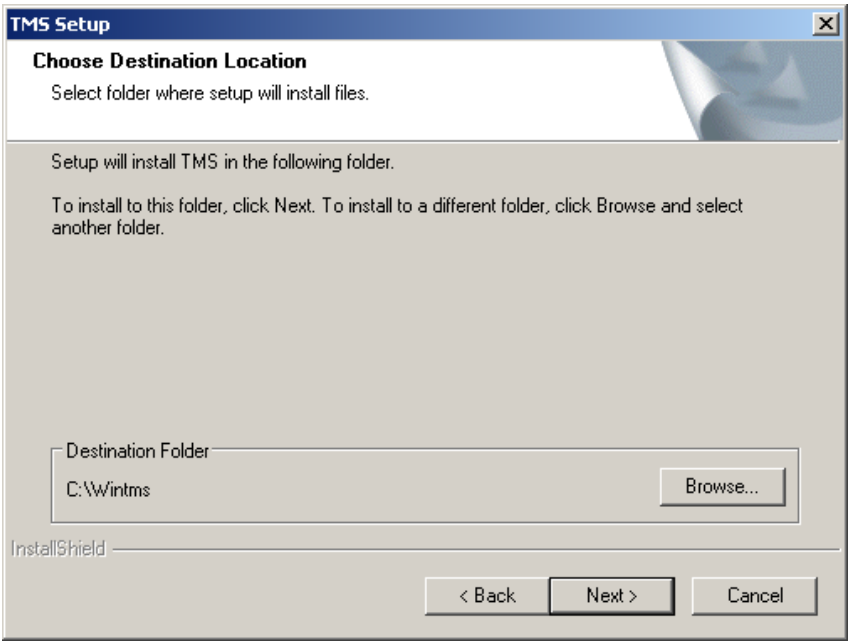
Place the installation CD-ROM in the CD drive of the selected machine. The CD should run automatically. If it does not, run **setup.exe** in the root directory of the CD either from the **Run** option on the **Start** menu or by finding and selecting it from Windows Explorer.

First of all, a **Welcome** screen will be displayed. Click **Next** to move on to this screen:

Read the licence agreement and click **Yes** to confirm you accept its terms. This will take you to this screen:

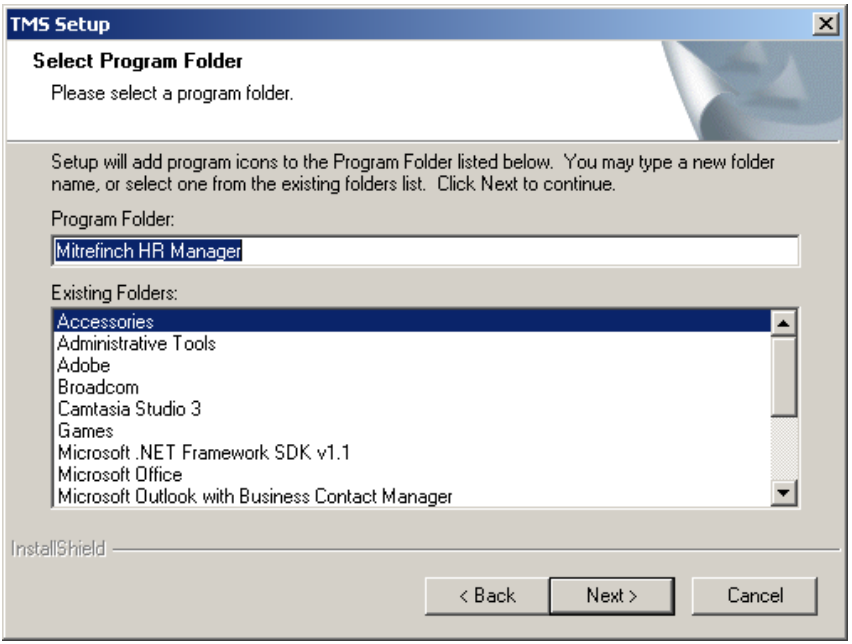


Here you should select which Mitrefinch programs you are installing. If just HR Manager, ensure this is the only box ticked, and click **Next**.



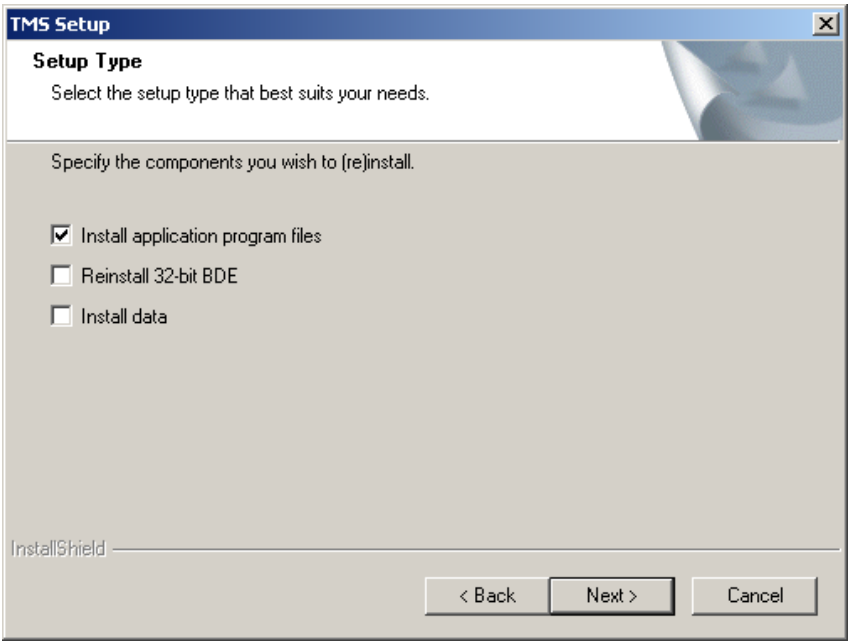
The location of the HR Manager program files is shown on this screen. If the desired directory is not already displayed as the **Destination Folder**, click on **Browse** to find the correct destination. The directory does not need to have been created previously. The directory should be a network directory accessible to all machines that will run the application.

Click **Next** to move on to the next screen.

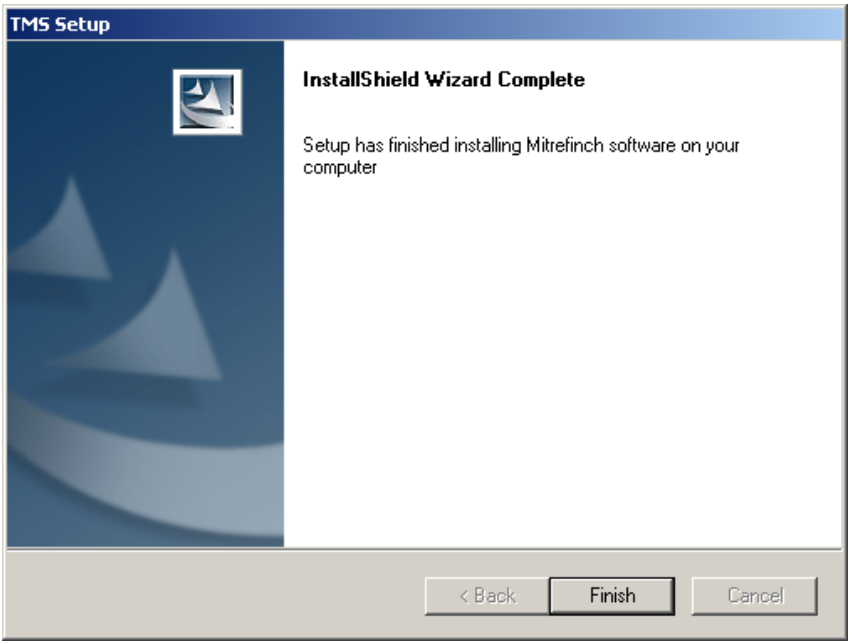


On this screen the name of the **Program Folder** that will contain HR Manager icons is entered. By default it is called **Mitrefinch HR Manager**. You should accept this default unless there is a good reason not to, because the program folder name is the item on the **Start** menu that will be used to access the application programs.

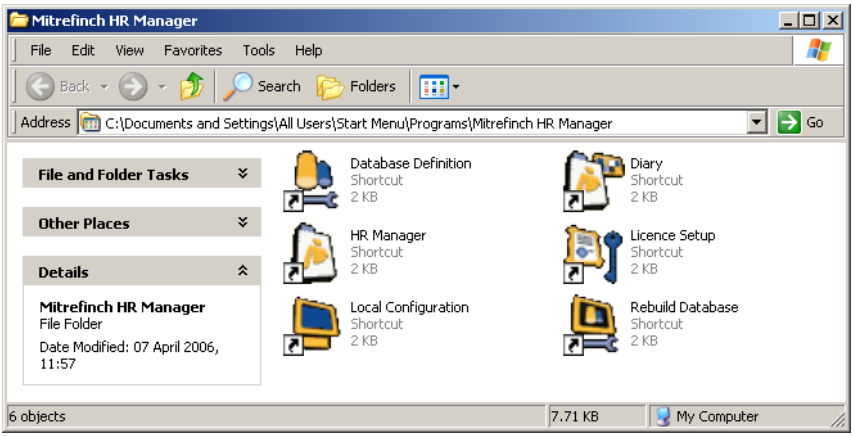
Click **Next** to bring up this screen:



This screen is used to specify which components you wish to install. If installing for the first time, you should tick **Install application program files**. If a 32-bit BDE already exists on your machine, you can choose to **Reinstall** it by ticking the box. You can also choose to **Install data** - this is not usually necessary. Click **Next** to complete the installation. This screen will confirm that the installation has been completed:



Click **Finish**, and the folder you selected to be the **Program Folder** on the **Start** menu is opened, containing icons for all the Mitrefinch applications you have installed:

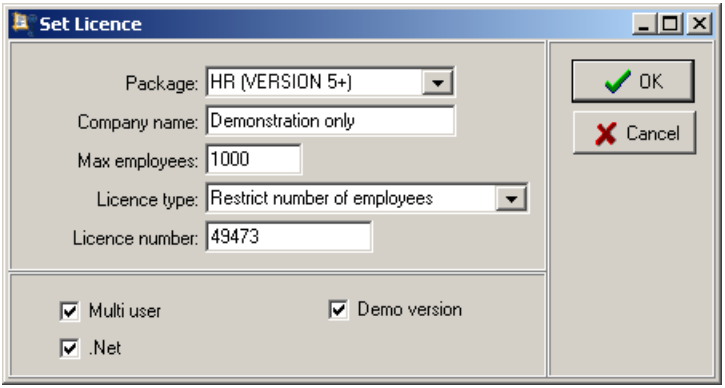


You will now find this folder on the **Start** menu in the location given. This can be used to open HR Manager and its additional components. Before you run the application, there are some additional steps you should take.

2.3 Licence setup

You need to enter the licence details. To do this, open the **Licence setup** program by clicking this icon in the HR Manager folder:

When the program is opened, a screen like this appears:



Ensure the **Package** selected is **HR (VERSION 5+)**. Enter your company details and the licence type and number (this information will have been supplied by Mitrefinch), and click **OK**.

2.4 Local configuration

Local configuration must be run (from the network) on every client machine that will be used to access the application. This will:

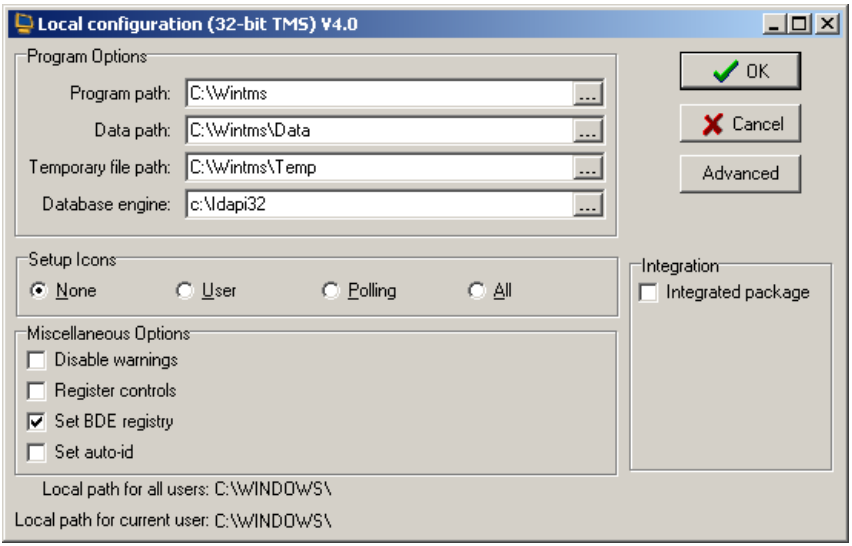
- Ensure that the BDE registry settings are correct on the client machine.

- Ensure that the registry settings used by the HR Manager Word Processor are correct on the client machine.
- Create the file pers.ini on the client machine used to hold locally the location and settings of the database and to hold local preferences.
- Create a program folder containing short-cuts from the start menu to the HR Manager programs on the client machine.

The **Local configuration** program can be opened by clicking this icon in the HR Manager folder:

LOCALCFG

The following screen is displayed:



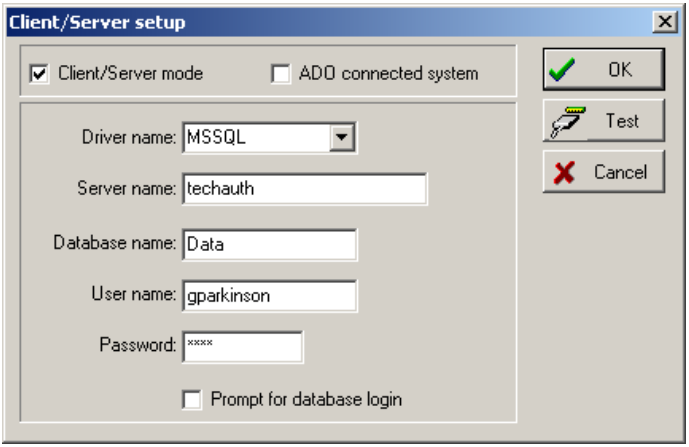
The **Setup icons** section allows you to create short cuts to the HR Manager programs from the **Start** menu.

- For the system administrator, select **All** to create short-cuts to HR Manager, Diary, BDE administrator, Database definition, Licence setup, Local configuration and Rebuild database.

- For a normal system user select **User**, and short-cuts will be created to HR Manager and Diary.

The other options on this screen should already have been set up correctly, so will not need changing.

You will need to ensure that settings are correct on the **Client/server setup** screen - this is accessed by clicking the **Advanced** button:



The **Client/Server mode** box needs to be ticked.

Select as the **Driver name** the type of database used on the system.

The **Server name** also depends on the type of database used:

- Interbase database - set the server name to the path and name of your database.

- MSSQL database - set the server name to the name of your network server.

- Oracle database - set the server name to the local alias for the database instance set up in SQL*Net configuration.

The **Database name** should be left blank unless using a MSSQL database, in which case enter the name of the application's database on the server.

The **User name** field should be filled in with the name of the database user. This applies to all database types.

In the **Password** field, enter the password for the database user. This also applies to all database types.

If you tick the **Prompt for database login** box, users will be prompted for their password every time they try to connect to the database, i.e. when they run any of the HR Manager programs apart from **Local configuration**.

2.5 BDE administrator

In order for HR Manager to run correctly, certain settings must be defined in the database engine configuration file. If the BDE was already installed prior to the installation, existing BDE settings will not be overwritten, so the values must be set manually.

The settings can be changed using the BDE administrator (**bdeadmin.exe**). In the configuration panel, select **Drivers/native** and then click on the driver used by your database. Whether the database is MSSQL, Oracle or Interbase, you should ensure the **blob size** is 512.

2.6 Rebuild database

The system generator (**sysgen.exe**) is used to rebuild your database and move all the HR Manager tables into the Client/Server database. Select this icon:

This will bring up a prompt, asking whether you wish to upsize, on which you should click **Yes**. You will then be asked to enter the **Daily PIN** (for details, contact Mitrefinch Support). Once this has been entered, click **OK** and all the HR Manager tables will be moved into the client/server database.

CHAPTER 3

GENERAL SYSTEM USE

3 General System Use

This manual assumes that you already have a basic knowledge of a Windows-based package, and that you know how to drag and select text using a mouse.

There are various functions of HR Manager that you will need to use across the system, for example, selecting a range of employees, or using calendars to select dates. The basic operation of these features and others is explained in the following pages.

3.1 Standard and customised systems

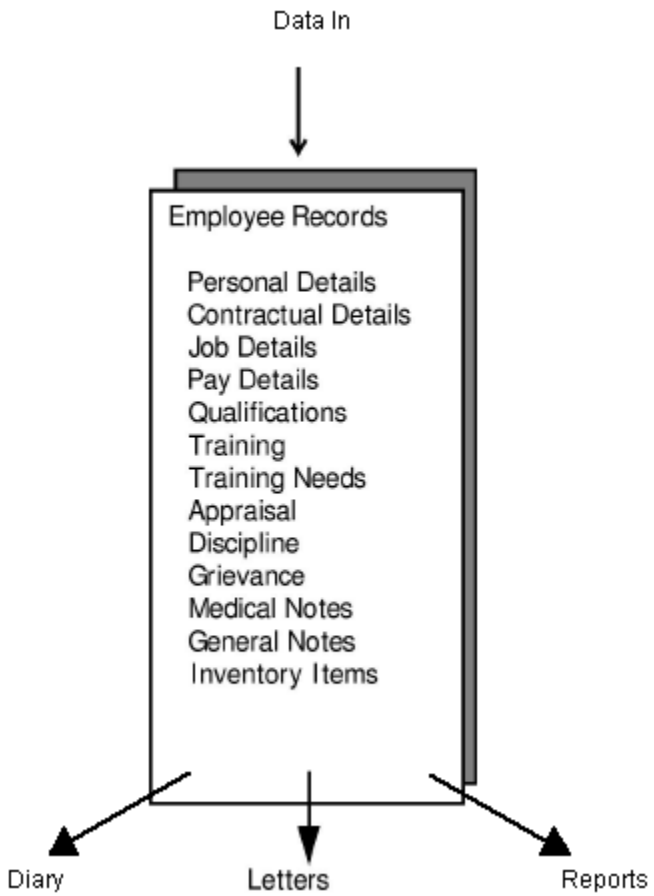
The following chapters document all the standard employee details - i.e., the information stored on a standard HR Manager system. However, your system may have been set up with customised panels or fields, specific to your own organisation, in addition to the standard information. As these are custom settings, they are not covered in this manual. It may also be the case that some of the forms documented do not appear on your system, as they are not considered appropriate for your company.

3.2 System overview

Mitrefinch HR Manager has been designed so that there is one main screen from which all tasks can be performed. This has a large number of standard forms, which contain most of the personnel information required by an organisation - e.g., personal details, job details, education and qualifications, pay details and organisational details. The main form consists of menus, drop-down lists and icons, which give access to all functions of the system. For more details, see **Main form**, page 25.

What can I use the system for?

HR Manager is an intelligent and effective information management system. Consider the following:



The appropriate employee data is entered into the system and this information is used to produce automatic diary entries, letters and reports.

3.3 Logging on

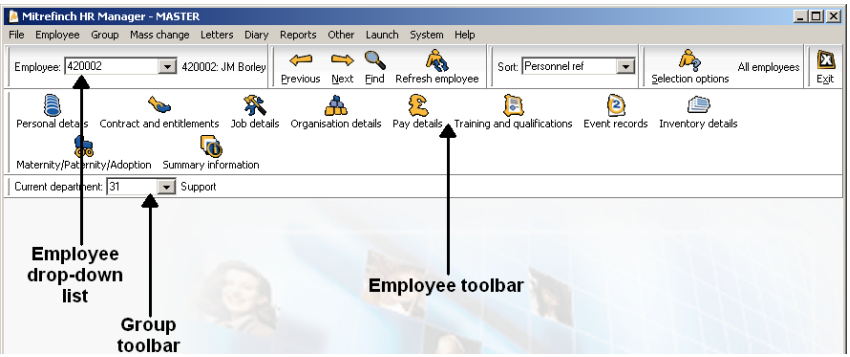
When HR Manager is selected, the login screen will be displayed:

Enter your user name and password. The default user name is 'MASTER' and the default password is 'PASS'.

Then click the **Login** button:

The main form appears, from which you can access all areas of the system.

3.4 Main form



This is the main screen of HR Manager, although the form on your screen may differ in appearance. This depends on two factors:

- your access rights - your system administrator determines which areas of the system are accessible, and which areas are restricted.

- the system preferences - various elements of the display can be customised, and features can be added or removed, according to individual requirements.

From this screen you can access all the main functions, using in particular the key areas of the system: the two drop-down lists on the left which allow you to select an employee and a group, and the toolbars, containing icons, which provide access to some of the most commonly used parts of HR Manager.

See **Select an employee** (page 27) and **Select a group** (page 28).

The employee toolbar contains the most common functions you will need to use for accessing individual employees' information. Clicking on the large icons provides entry to forms for the currently selected employee, that can also be accessed from the **Employee** menu.

Any functions that are not represented by icons on this main form can be accessed from one of the menus at the top of the screen.

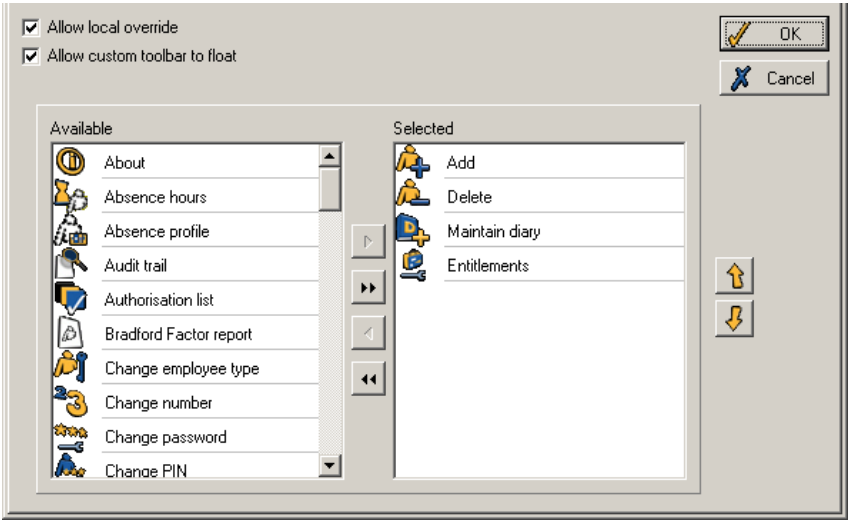
To alter the display or content of the **Employee** drop-down list, see **Selection options** (page 29).

3.5 Custom toolbar

The preferences enable you to customise the user-defined toolbar. The user-defined toolbar can be displayed on the main form in addition to (or instead of) the **Employee** and **Group** toolbars. It can be useful to add icons to this toolbar for the functions you find yourself accessing most frequently, as it may save time searching for the function on the different menus.

To display the custom toolbar, open the **Other** menu and go to **Display**. A sub-menu opens, on which you should make sure **Custom tools** is ticked.

To customise this toolbar, select **Local preferences** from the **Other** menu, or open **Maintain preferences** from the **System** menu, and click the **Toolbar** tab. The form looks like this:



Use the arrows to select which icons will be displayed on your user-defined toolbar, and in which order (for details, see **Select available items**, page 39).

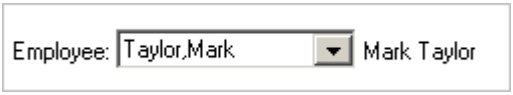
Once you have finished customising your user-defined toolbar, click **OK** to save the changes and close the form.

For details on displaying the custom toolbar, see the **Toolbar** section of the **Maintain preferences** chapter, page 136.

3.6 Select an employee

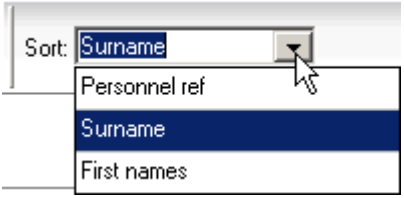
To view or edit the details of an individual employee from all those registered on HR Manager, you must first select the required employee. There are two ways of selecting an employee.

If you know the required employee's name, the easiest way to select him or her is to use the drop-down list marked **Employee**, on the left-hand side of the screen:



To select the previous or next employee in the list, use the buttons above the list:

The sort order of this list can be altered at any stage by choosing a new entry from the **Sort** drop-down list:



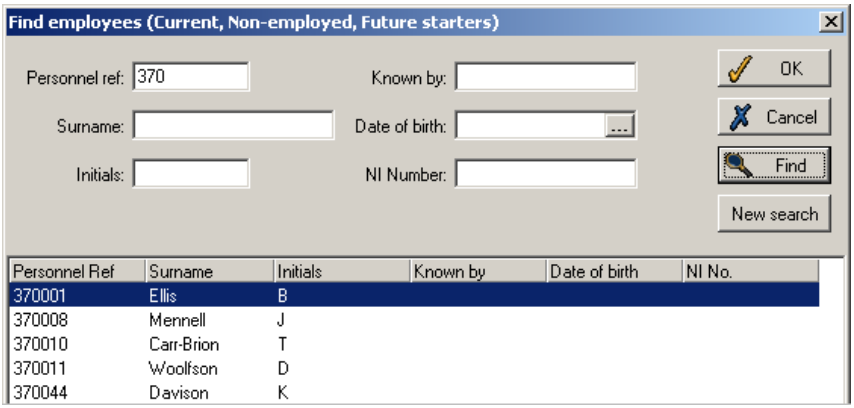
In this example, the list can be ordered by personnel reference number, surname or first name.

To make more complex alterations to the display and content of the list, see **Selection options** (page 29).

Find

Should you know some details about an employee, e.g. NI number, without knowing the employee's full name, you can find the required person by selecting **Find** from the **Employee** menu, or by clicking this icon:

Enter the details you know into the relevant boxes (you can also enter part-details, e.g., if you know an employee's reference number begins with 370, then entering this into the **Personnel ref** box will display all those whose numbers contain '370'), then click **Find**, which will bring up a list of all employees matching those criteria:



Select the required employee, then click **OK**, and the selected employee will be displayed in the **Employee** drop-down list, allowing you to view various details about him or her, and make any amendments to the employee's record.

3.7 Select a group

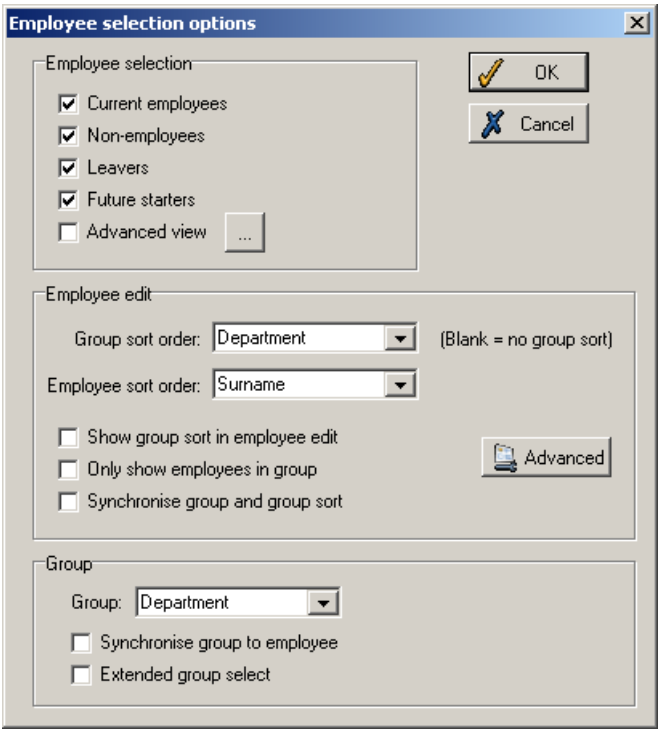
Select a group from the **Group** drop-down list, marked 'Current department', on the left of the screen, and the selected department's number will be displayed in the box. You are now able to view and edit the details of all employees in the selected group.

(Depending on the settings, employees might be grouped differently, e.g., by location or company, rather than by department. See **Selection options**, below, for details of this, and other ways of changing the layout and usage of the drop-down list.)

3.8 Selection options

To change the way employees and groups are selected, click this icon on the main screen of HR Manager:

This will produce a form similar to the following:



Any changes made on this form affect the way employees and groups are listed on the main screen.

Employee selection

On the top section of the form, tick the boxes for each category of people you wish to include in the **Employee** drop-down list. Tick as many boxes as required, so that, for example, former and future employees are shown alongside current employees.

Should you wish to define a new category of employees, tick the **Advanced view** box and click the button to the right:

A form is displayed, which can be used to create a new category.

A description of the selection that has been made (e.g., 'Current/Future starters') will remain on the main screen, to the right of the **Selection options** icon, after this form has been closed.

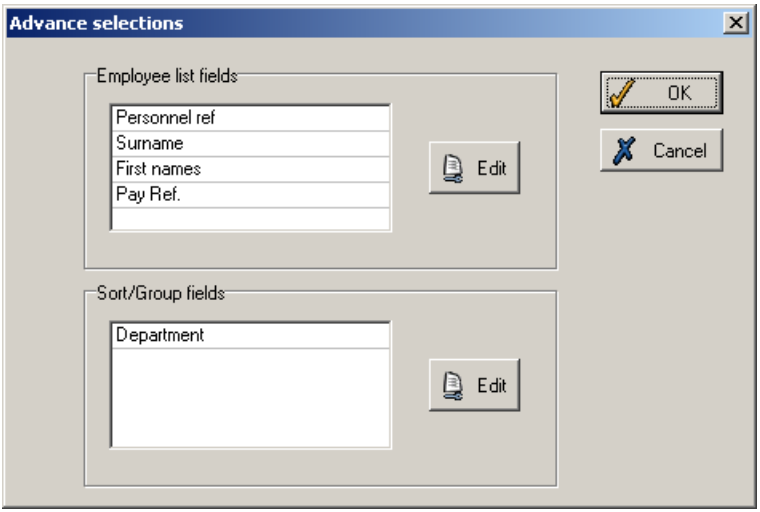
Employee edit

This section of the form allows you to change the way the **Employee** drop-down list is displayed on the main screen. The **Group sort order** and **Employee sort order** boxes show the order in which the list is sorted. On the example on page 30, the group sort is by department, and the employee sort by surname. This means that all employees in the first department will be at the top of the list, sorted by their surnames, followed by all the employees in the second department, and so on.

Both sort orders can be changed by selecting a different option from the drop-down list. To sort the list purely according to the employee sort, leave the **Group sort order** blank. For example, if no group sort order is entered, and 'Surname' is the **Employee sort order**, the employees will be sorted alphabetically by surname, regardless of group. However, although **Group sort order** can be left blank, an entry must be selected for the employee sort.

To change the options available in the two sort order drop-down lists, click the button to the right:

This brings up the following form:



The 'Employee list fields' and 'Sort/Group fields' boxes contain the options currently in the respective sort order lists. Clicking this button:

next to the appropriate box shows a list of alternative sort-options, which can be selected using the arrows (see **Select available items**, page 39).

Click **OK**, and any additional selections will appear in the relevant box.

Then click **OK** to return to the **Employee selection options** page, where the new options can be chosen from the appropriate sort order drop-down list.

The three tick-boxes in the 'Employee edit' section of the form affect the workings of the **Employee** and **Group** lists on the main screen:

- **Show group sort in employee edit** - when this is ticked, the **Employee** drop-down list will display the employee's group (as defined by the group sort order) alongside the other employee details.

- **Only show employees in group** - this limits the **Employee** drop-down list to the members of the currently selected group. When this is not ticked, all employees will always be shown on the list, regardless of which group is selected.

- **Synchronise group and group sort** - when ticked, this means that the option entered in the **Group sort order** box for the **Employee** list is also entered automatically as the sort-order for the **Group** drop-down list. When left empty, the selection for the group sort order only controls the layout of the Employee list.

Group

This section controls aspects of the **Group** drop-down list on the main screen.

Use the box marked **Group** to select the definition of a group (e.g., department or location).

(If the 'Synchronise group and group sort' box above is ticked, the selection in the **Group** box cannot be changed, because the group sort order is automatically replicated in the Group box. The 'Synchronise group and group sort' tick box must be cleared if you wish to change the entry in the Group box.)

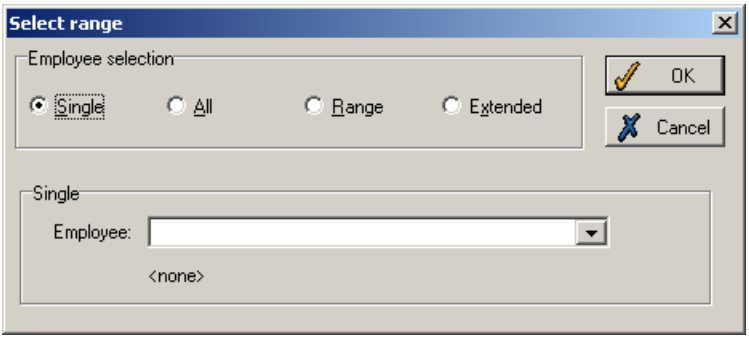
There are two further tick-boxes in the 'Group' section:

- **Synchronise group to employee** - when ticked, the **Group** drop-down list on the main screen cannot be manually changed, because it will always display the group of which the currently selected employee is a member, and will change automatically if you select an employee from a different group.

- **Extended group select** - if this is ticked, the **Group** drop-down list on the main screen will display in grey, indicating that it has been blocked off. This means that no group is 'selected' on the main screen; instead, every time a group function (i.e., one from the **Group** menu or **Group** toolbar) is selected, the **Select range** form will appear (see page 34), and you should use this form to select the employees to include in the task you are performing.

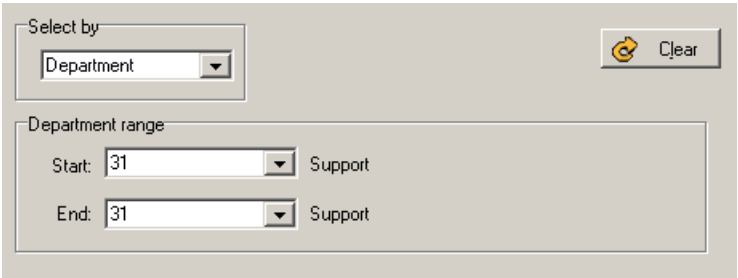
3.9 Select range

When opening certain parts of the system, the following box is displayed, allowing you to define which employees or departments to view:



Click one of the four boxes when choosing the range of people to include:

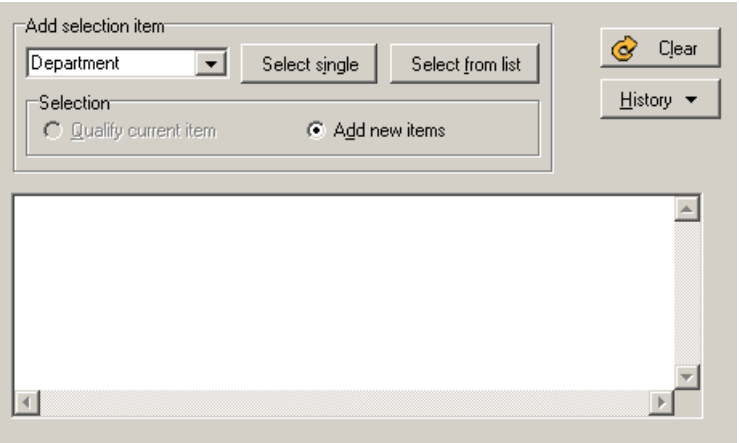
- **Single** - select one person from the **Employee** drop-down list.
- **All** - the drop-down list will disappear, as the function will include all employees on the system.
- **Range** - this allows you to include, for example, all employees in a certain department, or in a range of departments.



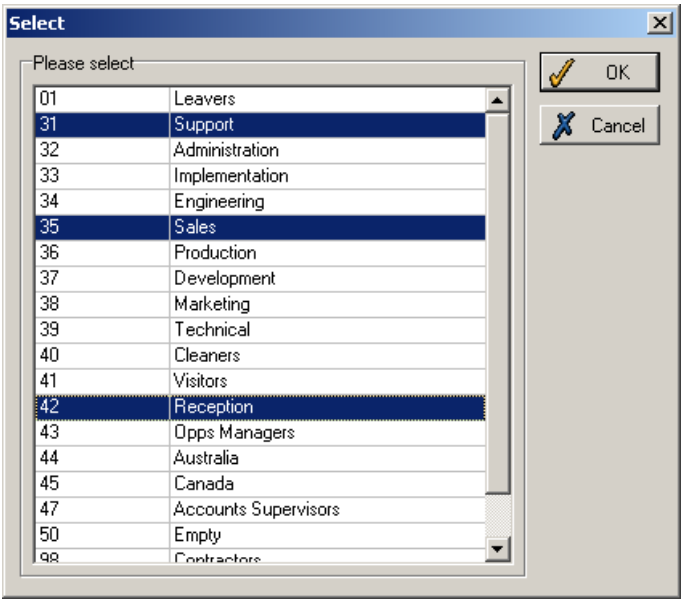
In this example, the selection would cover all employees in Department 31. Changing the **End** value to 35 would include all employees in Departments 31 to 35. Change the **Select by** entry to 'Employee' to include a range of employees, selected by their employee numbers. There are also numerous other options to 'select by'.

NB: Whenever you are selecting a range in this manner, you must ensure that the **Start** value appears on the drop-down list before the **End** value. For example, selecting Department 35 as the **Start** and Department 31 as the **End** will produce an invalid range, which will not allow you to proceed.

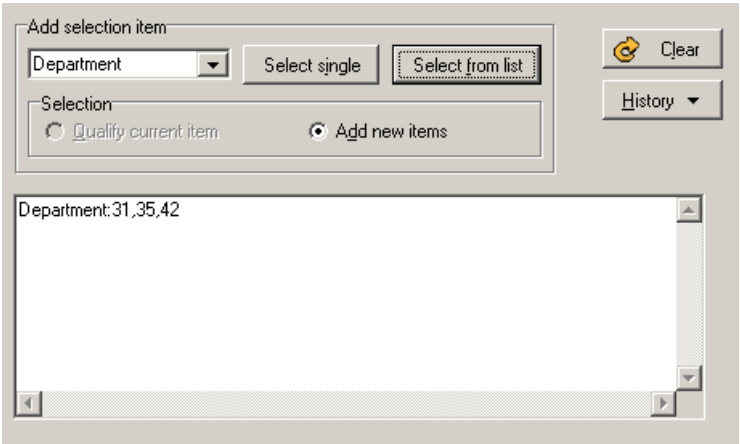
- **Extended** - this will offer a new drop-down list, marked **Add selection item**. A selection may include, for example, all employees in departments 31, 35 and 42, as well as two individuals from other departments, with reference numbers 320029 and 410011.



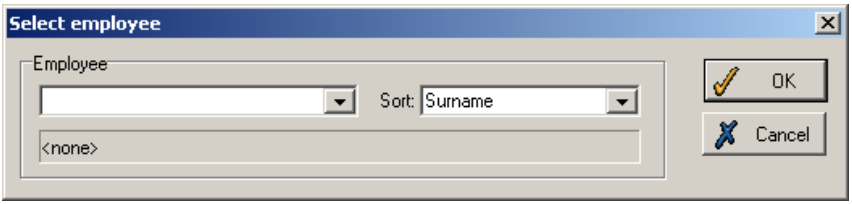
First, select 'Department' from the drop-down list, then click **Select from list**. This displays a pop-up box allowing you to select the required departments. When selecting multiple items, hold down the 'Control' button on the keyboard and click each item you wish to select, which will be highlighted in blue when selected.



Click **OK**, and the departments you have selected will be shown on the screen.

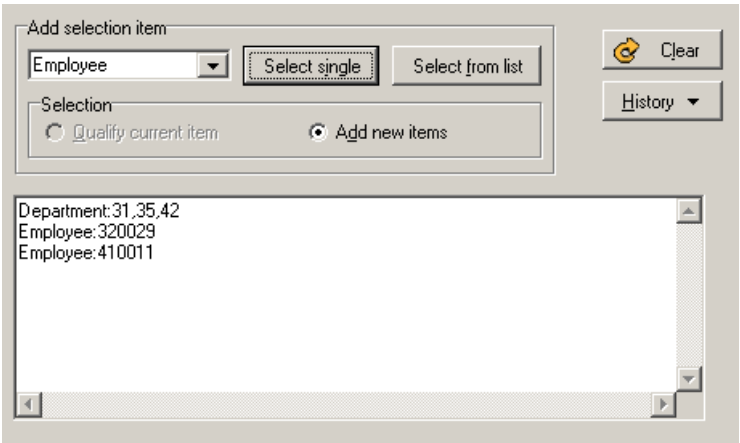


Having selected the departments you wish to include, you must now add the two other employees. Change the **Add selection item** to 'Employee', and select the individuals by clicking **Select from list**, and choosing them in the same way you chose the departments. (You may find it easier to add the employees in a different way. Click **Select single**, to display the following box:



Use the drop-down list to change **Sort** to 'Personnel ref', then type 320029 in the **Employee** box and click **OK**. Do the same for employee 410011. This removes the need to scroll through a long list of employees.)

The two will be displayed alongside the departments, as the selection.



History

Should you wish to select the same range as one you have used recently, click **History** to display a drop-down list of recent selections. This button remains on-screen throughout the **Extended** employee selection process.

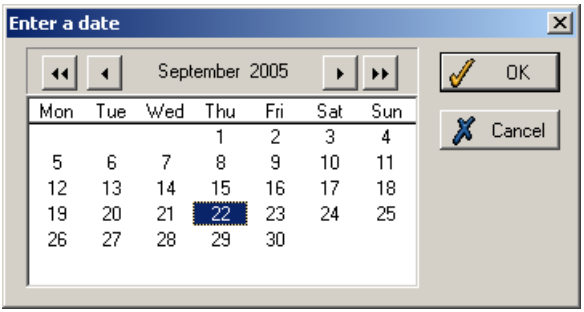
To remove your selections from the box, and to start the selection process again, click **Clear**.

Once you have selected the required employees, click **OK** to perform the task.

3.10 Select a date

When you are required to select a date (for example, when adding a new employee to the system, you must enter the employee's start date), there is usually more than one way of doing so. You can type the date into the box provided, but often the easiest way is to use the calendar button, to the right of the box:

Click on this to display a calendar for a month:



The calendar will display the current month, unless a date has been selected previously, in which case the calendar will display the month of the previously selected entry.

If the date you need to enter is from a different month to that shown on the calendar, use the arrows to move to the required month:

 - previous month;  - next month;

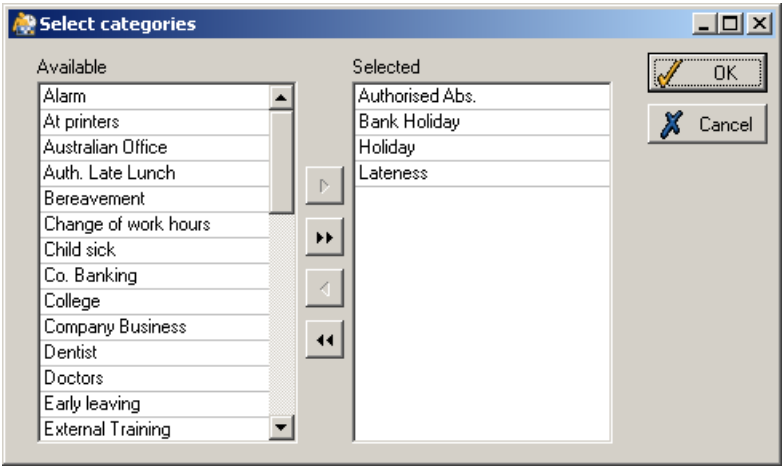
 - previous year;  - next year.

Once the calendar shows the month that you require, select the day by clicking on it, making it highlighted in blue. Then click **OK**, and the highlighted date is the new entry in the box.

3.11 Select available items

On a number of occasions, you will have the opportunity to move items between an **Available** box and a **Selected** box. One such occasion is when selecting which absence types are to be displayed on the **Absence profile**, although the same principle applies to all times when you use the **Available** and **Selected** boxes.

The form will look similar to this:



Move the categories you wish to be displayed from the left-hand box (**Available**) to the right-hand box (**Selected**) by clicking on the required category (highlighting its background in blue), and then clicking on the single right-pointing arrow:

The category will now appear in the right-hand box. Repeat this for each type you wish to display. Alternatively, if you wish to view all the categories, you can simply click the double right-pointing arrow:

to move all the types into the **Selected** box.

Remove categories from the **Selected** box to the **Available** box in the same manner, but using the left-pointing arrows.

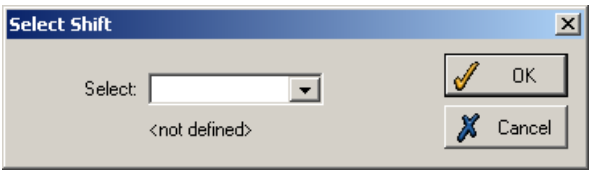
Click **OK** to view the selected absence types.

3.12 Using drop-down lists

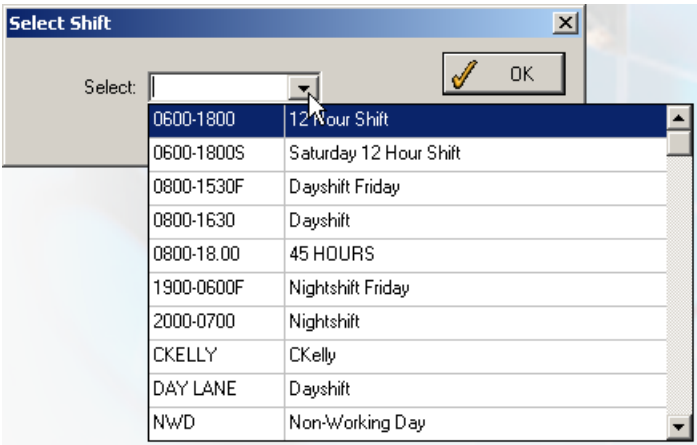
While using HR Manager, you will frequently need to make a selection from a list of possible options. Wherever this arrow button:

appears to the right of a box, you do not need to type in any details, but should click the arrow to display the list.

On the example below, taken from the **Future Work Planner**, you are prompted to select a shift:

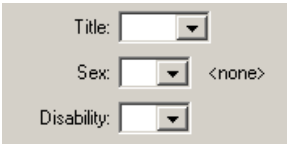


Clicking the arrow button displays a list of possible shifts:

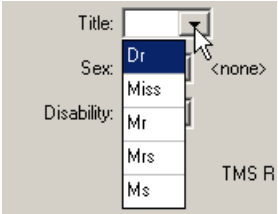


Click on the required shift, and it will appear in the box as your selected shift.

On the example below, taken from the **Personal details** form, three boxes have drop-down lists, for you to select the correct information:



Clicking the arrow button displays a list of possible options:



Click on the required option, and it will appear in the box as the selected information.

NB: In some functions, the arrow is hidden until the box is selected. For example, on the **Planned absences** form, drop-down lists are available to allow you to select a new absence type, but are only visible when you have clicked on the relevant box. Clicking once on the box reveals the arrow, which you should click to display the list.

3.13 Using Edit and Update

When entering employee details, you will be able to use either the **Edit** or **Update** button. It is important to understand the difference, which is best explained by the following examples:

a) You enter details for a new employee and later realise that the surname is spelt incorrectly.

To correct the mistake you would use **Edit**, as this simply overwrites existing information and keeps no record of what was there previously.

b) An employee informs you that she is to be married and will change her surname.

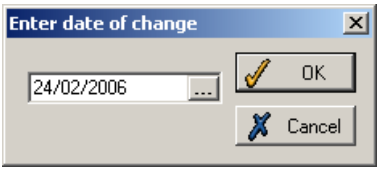
In this case you would use **Update** because you want to keep a record of the previous surname and also of the date of change. You are not correcting a mistake but actually updating the information.

3.13.1 When to use Update

This ensures that a record of the change is kept in the system.

You may be adding information that is to take effect immediately, or you may be entering a future change. If necessary, you can 'update' information in the past but only in certain fields. If the field does not accept a past date, and a past date has been entered, this value will become the current value. If you enter a future date, the value will become the current value only on that date.

To update, click the **Update** button, and you will be prompted to enter a **Date of change**:



This can be a current, future or past date. When you enter a date, you will be presented with the form as it was on the selected date, based on existing information. You may then enter the correct information.

NB: Date fields which are labelled **From** will automatically change to reflect the effective date of change for each field. You should never need to change these dates yourself.

The advantage of using **Update** is retaining a record of the change. For details on accessing this record, see **Viewing historical information**, page 44.

Using Update for a future change

Enter the future date as the **Date of change**. You will be presented with the form showing the information as it will be on that date, based on any information the system already holds. Make the necessary changes. When you click **Apply** to save the changes, the panel will display current information (i.e., not showing the change you have just made) but the change can be viewed using field or screen history and will automatically take effect on the due date.

For example:

An employee is moving house and provides a new address 3 weeks beforehand. You may enter the new address immediately by clicking **Update** and entering the effective date of change. The actual date of the address change is entered, but the display panel for the current information will not show the new address until the effective date.

Using Update for a past change

Click on **Update** and select the past date when prompted. You will be presented with the information as it was on that date, based on the information the system holds. Make the necessary changes. When you click on **Apply** you will again see current information, which will only include the change you have just made if that change is still current, (i.e., no more recent amendment has been made to the data).

Consider the following examples:

You currently have an employee shown as being a Production Manager since 01/04/2005. You know that prior to that date she was a Production Technician but this has not been entered on the records. Using **Update**, select the date that the employee became a Production Technician and click **Apply** to display the panel for that date. Make the necessary changes. When you return to the current panel the Production Manager job title will still be shown because that is the most recent information.

You are informed that an employee was promoted from Sales Clerk to Sales Supervisor last week. Using **Update** mode you enter the effective date of change and make the necessary changes. When you return to the current view, the new position will be showing because it is the most recent change.

3.13.2 When to use Edit

Only use **Edit** if you are correcting information without keeping a record of the change in the history.

Clicking on the **Edit** button puts the form in 'edit mode' and is used to correct the currently displayed information. The effective date is the date on which the change was originally entered. This new information will overwrite the existing details and there will be no record of what was entered previously.

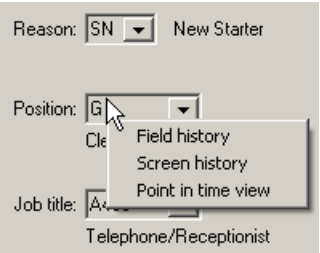
For example:

An employee is recorded as being a Purchase Ledger Clerk since 01/04/2004 when it really should be Purchase Ledger Assistant . Use **Edit** to correct the mistake. The effective date of change will still be 01/04/2004.

3.14 Viewing historical information

Historical details can be accessed for many fields of information in the system (e.g. salary, job grades, hours). On the standard system, the Personal details, Contract and entitlements, Job details, Organisation details, Pay details and Maternity forms all retain historical information. Whenever you make a change in **Update** mode (see page 42) to one of these forms, a new history line is created.

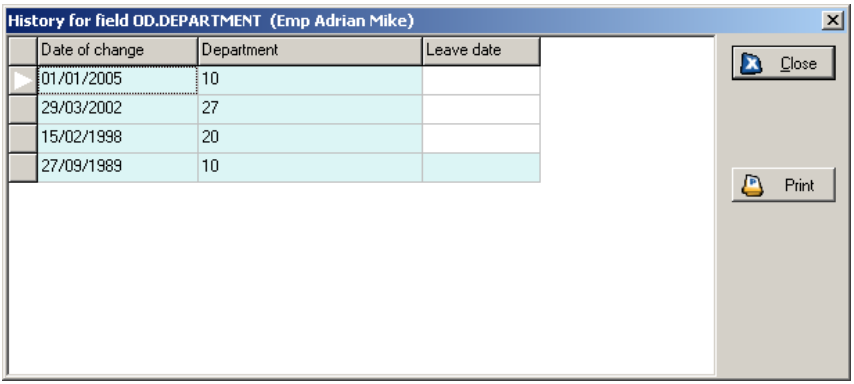
You can right-click the mouse on all fields (except for calculated fields) to display a menu.



This diagram shows part of an employee's **Job details** panel. When you right-click inside any box the menu with these three options will be displayed.

3.14.1 Field history

If you select **Field history**, a form like this appears:

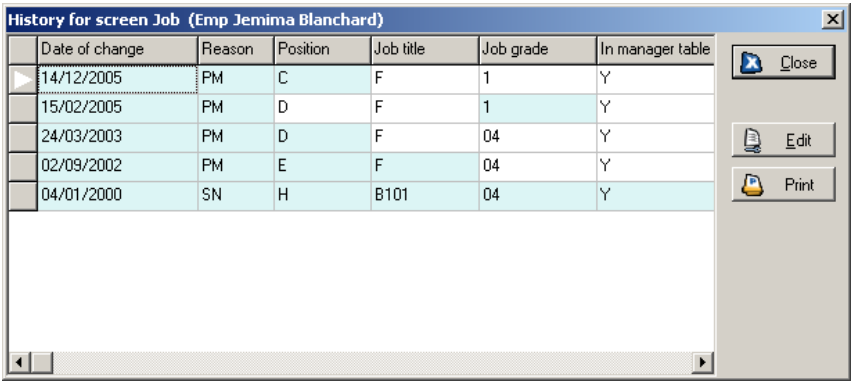


This form will display the date and the value of any changes that have been made to the current field (including future changes). This example shows that there have been three changes made to the employee's department, since a department was first entered. If a future change has been entered, this will also be shown here.

Double-click on one of the changes to open a **Point in time view** for the panel on that date (see page 46 for details).

3.14.2 Screen history

If you select **Screen history**, a form similar to the following will be displayed:



Date of change	Reason	Position	Job title	Job grade	In manager table
14/12/2005	PM	C	F	1	Y
15/02/2005	PM	D	F	1	Y
24/03/2003	PM	D	F	04	Y
02/09/2002	PM	E	F	04	Y
04/01/2000	SN	H	B101	04	Y

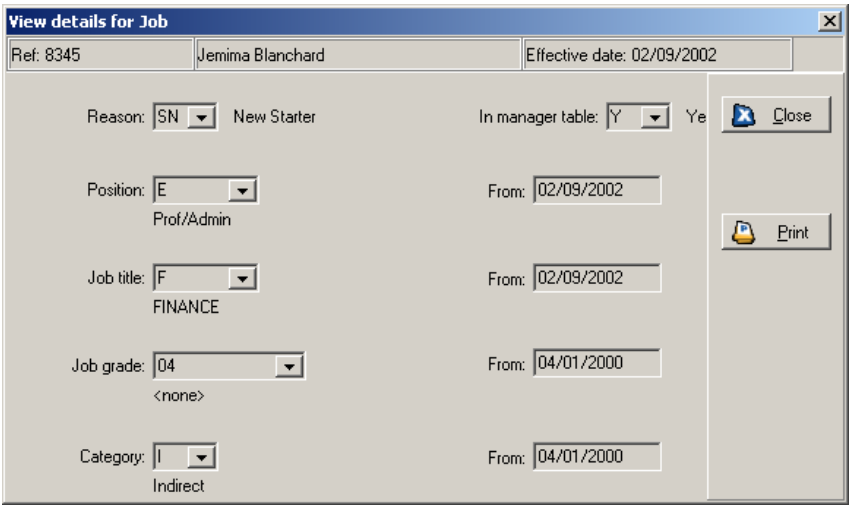
This form shows all alterations to fields on the panel, showing the **Date of change** and containing as the first column the field that was clicked on (in the above example, **Reason** was clicked on). The form only shows changes for fields which retain historical details.

All alterations are highlighted with a pale blue background.

If you wish to print selected columns you can drag columns from one position to another using the header row, and you can increase or decrease the width of columns. The **Print** button allows you to print a copy of whatever is displayed in the window.

3.14.3 Point in time view

Select **Point in time view** to see information as it was, or will be, on any date. A form appears allowing you to enter the required date. You will then see the panel with details as they were on the specified date.



This panel is read-only, so cannot be altered.

3.14.4 Editing historical information

If a row of historical or future information in the **Screen history** view is inaccurate, it can be amended.

This can be done in two ways, depending on whether you want any current code rules to apply. If you are editing past history it is possible that the complex code structure (how different fields of information relate to one another) has been changed since the history line was created and that rules which applied then do not apply now. (See **Complex codes**, page 153, for details.)

If the code rules may have changed, you must edit the information within the **Screen history** form (see Method 1 below).

If the current code set-up is still likely to apply you may find it easier to edit the panel using the second method (see Method 2 below).

Method 1: Editing history where existing code rules do not apply

In **Screen history** click the **Edit** button and change any incorrect information within the table. You can also use the buttons on the right to **Delete** a row of changes, or to **Add** a new row, with any changes to apply from the date that you select. Existing code rules do not apply here.

Method 2: Editing history where existing code rules still apply

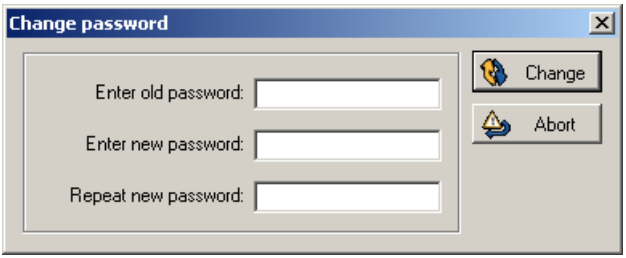
In **Screen history** click **Edit**. Select the history line that you wish to change and click the **Modify** button. You will now see the panel with details as of that date, which can be changed in the required way. Existing code rules will still be applied.

3.15 Change password

It is important to keep your password a secret, particularly if you are a system administrator or have a high level of access to the menu options and employees in the system. If your password becomes known by others, attempts could be made to access the system with your username.

If the password expiry function is used by your system, you will need to change your password at regular intervals. The system will warn you when the password expiry limit is approaching. It is advisable to change your password when you receive a warning. Alternatively, you may delay changing the password until later, when you should use the **Change password** function.

Select **Change password** from the **Other** menu:



Enter the old password, then enter the new password and repeat it for confirmation. The new password must be between four and ten alphanumeric characters in length. For security, both the old and new passwords will be hidden while they are entered.

NB: For security reasons, the new password cannot be a repeat of the current password, or of the last six passwords used.

To ensure the new password is valid, the system checks that:

- a new password has been entered (blank passwords are not allowed);
- it is between four and ten characters in length;
- it is not the same as the original password;
- it is not a repeat of any of the last six passwords used.

Should the new password not meet all the criteria, an error message will be displayed, meaning you must enter another password.

Once a new password has been entered that does satisfy the checks mentioned above, a confirmation will be displayed:

You must now use the new password the next time you access any of your Mitrefinch applications.

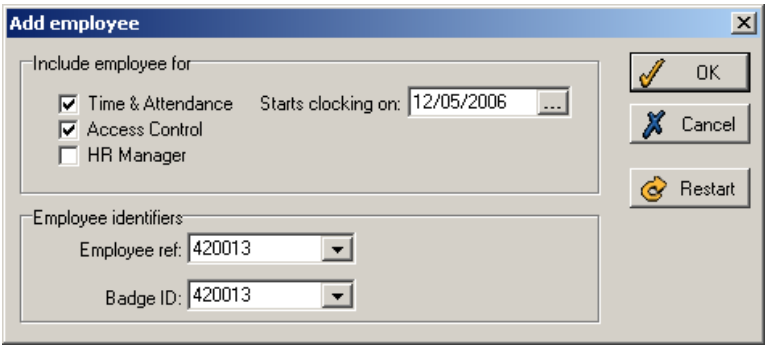
CHAPTER 4

EMPLOYEE MAINTENANCE

4 Employee Maintenance

4.1 Add an employee

Select **Add** from the **Employee** menu to bring up this form:

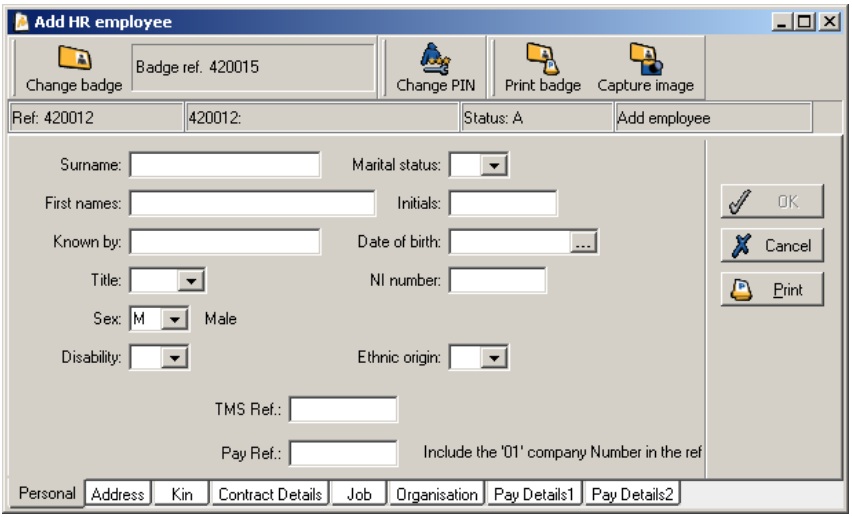


Use the tick-boxes to determine the type of employee: choose between Time & Attendance, Access Control and HR Manager (select more than one box if applicable). This affects which Mitrefinch programs the employee will be included in.

Use the calendar button to select the date the new employee **Starts clocking on**.

Now enter the new employee's **Employee ref** and **Badge ID**. Both of these numbers must be unique to the employee. (For details on entering employee reference numbers, see **Change employee number**, page 56.)

Click **OK** and the **Add HR employee** form will be displayed:



The first panel allows you to enter the employee's **Personal details** (see page 62 for details). To finish adding the employee, complete the panels as required. Some fields and panels are compulsory, i.e., you must enter information in them before you can click **OK**, and finish the form.

4.2 Restart an employee

If an employee leaves the organisation and then returns you should call up the previous record through the re-starter option and make the necessary changes rather than enter him or her as a new starter. (This can only be done if the employee's details were not deleted when he or she left - see **Employee leaving**, page 58, for details.)

For example, a company may employ seasonal staff who only work during the summer; it would waste time adding all their details into the system every time they came back to the company.

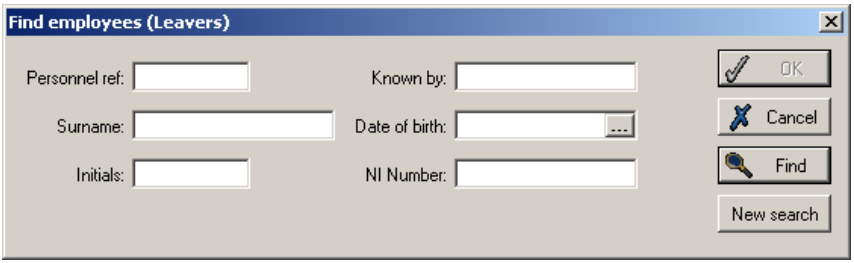
NOTE:

- Do **not** enter the employee as a new starter or you will have two records.

- Do **not** use **Change start date** - this is only used for correcting a mistake.

- It is important to re-start an employee through the **Restart** option rather than simply finding his or her record and modifying it.

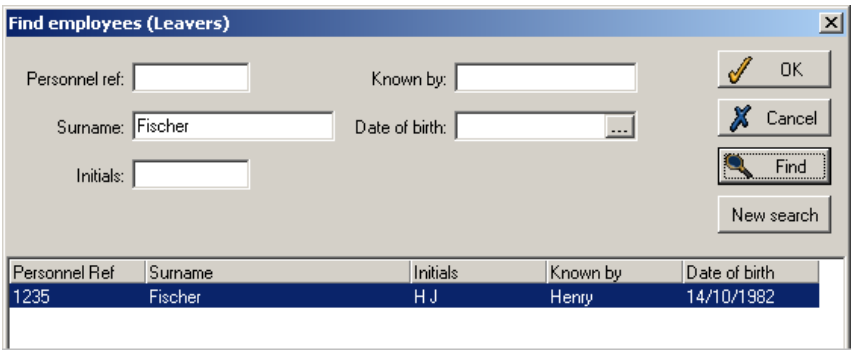
If you are restarting an employee, select **Add** from the **Employee** menu. Click the **Restart** button, to display a form like this:



This form enables you to perform a quick search of the system for the employee's details.

Click on **Find** for a list of all previous employees. Alternatively, enter any information that you know about the employee (e.g. surname, date of birth) and then click **Find**. Do not type in all the fields because there is less chance of finding a match with more information.

The system will then match the details you have entered to previous records. This screen will then be displayed:



The system has searched all the files of previous employees and found a match with this leaver. If the employee's details are not found the message 'No matches found' will be displayed instead.

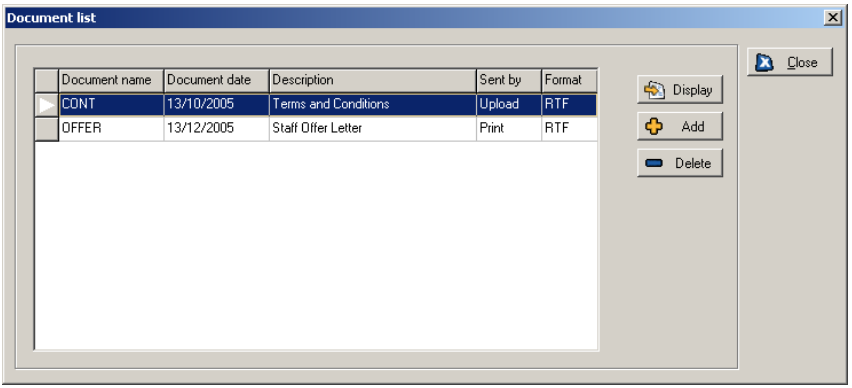
If the correct employee has been found, click **OK** (if not, try a **New search**). The **Add HR employee** form will now be displayed, with the **Personal details** panel showing first. Personal and contact details will be retained from the employee's previous spell of employment, but others, such as the previous job and contract details, will have been cleared so it will not be assumed they are the same. To find out the previous entry for a field, right-click on the box, and you can see a point in time view, or a history of the data.

Complete all the panels as required, and click **OK**, in the same way as for adding a new employee.

If you wish to change the original reference number you can do so (once the details have been updated and the **OK** button has been clicked) by using the **Change number** option - see **Change employee number**, page 56.

4.3 Files

Select **Files** from the **Employee** menu to see a table of all documents and other files stored that relate to the employee:



Documents such as the employee's contract and letters of appraisal may be kept here, as well as any certificates the employee has achieved, or other relevant files.

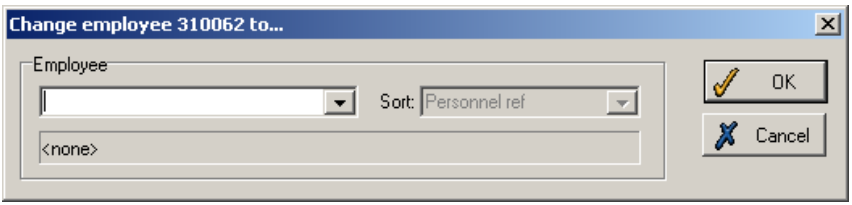
Click **Display** to view a document.

To add new files to the table, click **Add**. Enter a name for the document, and you are then able to create the document, which can either be a JPEG image, a RTF text document, or a link to any externally saved document.

This page also contains any letters that have been printed or emailed for the employee, as long as the letter was recorded. For details, see **Generate letters** page 105.

4.4 Change employee number

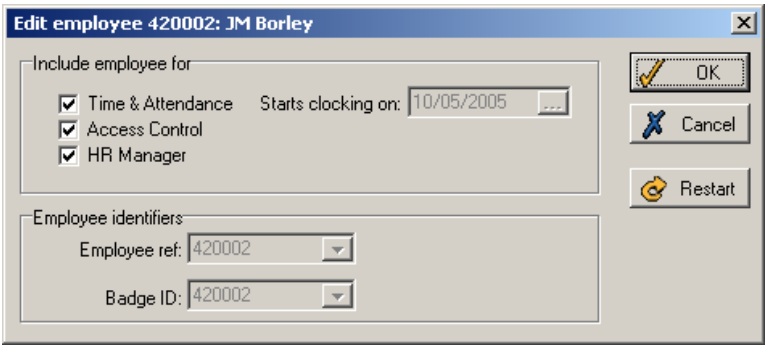
It is very rare that you should need to change an employee's reference number, as this is the unique number used to refer to the employee on the system. However, should you wish to do so, select **Change number** from the **Employee** menu. You will be prompted before you continue, to confirm that it is the reference number and not the badge number that needs to be changed:



Enter the new number you wish to assign to this employee in the empty box. Click **OK**, and the new number will be applied to the employee immediately. Historical information will also be changed, and no record of the old number will be kept.

4.5 Change employee type

To choose which Mitrefinch systems (e.g., Time & Attendance, HR Manager, Access Control) the employee should be included in, select **Change employee type** from the **Employee** menu.



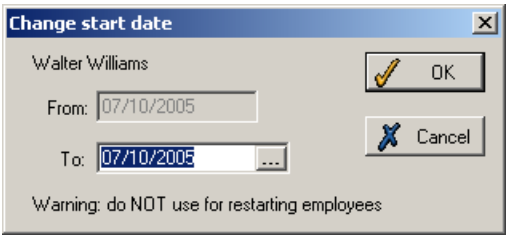
Tick as many boxes as are appropriate for the employee (depending on which applications are on your licence), and then click **OK**.

4.6 Change employee start date

There may be times when you have added an employee in advance of starting but the employee actually starts work on a different date; or you may wish to add an employee to the system without a definite start date (e.g., so that interview letters can be generated). In these cases you will need to change the initial start date. The reason for using this option rather than simply overtyping the start date is to ensure that all related dates are changed. For example, the start date affects the date an employee first started his or her job and the date from which the current pay applies.

NOTE: The **Change start date** option must only be used to correct a start date at the beginning of the first period of employment. Do **NOT** use the **Change start date** to restart an employee.

To change an employee's start date, select **Change start date** from the **Employee** menu to display this form:



Enter the correct start date and click **OK**. The start date (and any information related to this date) will now change accordingly.

4.7 Employee leaving

When an employee leaves your company, it is necessary to prevent the system from including this person on reports and in any day-to-day processing. This can be achieved in two ways.

The first method involves identifying the employee as a leaver, allowing historical information (e.g. start date, clockings, shift pattern) to be retained and accessed when required. This is also useful if the person rejoins the company at a later date, as he or she can simply be ‘restarted’, allowing the transfer of historical information into the active system.

The second involves the permanent removal of the employee from the system, along with all historical information accumulated while the employee has been at the company. Once removed, this historical data cannot be accessed within HR Manager. Care should therefore be taken when using this option.

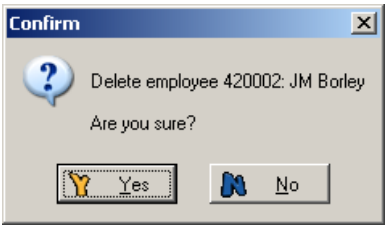
4.7.1 Identify the employee as a leaver

This removes employees from any day-to-day reports and processing in HR Manager, while still allowing enquiries on their historical details.

For details on how to do this, see **Leaver details**, on the **Contract and entitlements** form, (page 66).

4.7.2 Delete employee

To remove an employee from the system permanently, first ensure the required employee is selected, and is shown in the **Employee** drop-down list. Then select **Delete** from the **Employee** menu. This pop-up box will appear asking you to confirm the action:



Click **Yes** to delete the employee, and remove all associated information.

CHAPTER 5

EMPLOYEE DETAILS

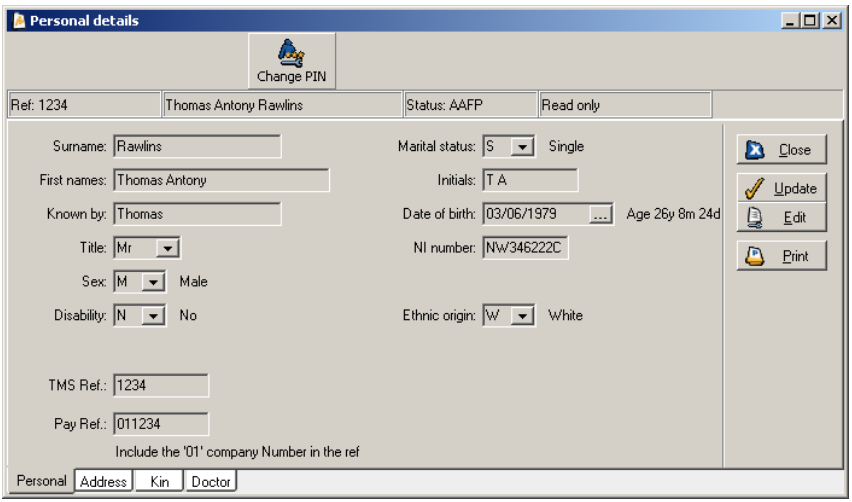
5 Employee Details

5.1 Personal details

Select this icon to view the employee's personal information:

There are four panels on the **Personal details** form - Personal, Address, Kin and Doctor.

5.1.1 Personal



As well as the usual personal details, you should also enter unique TMS Ref. and Pay Ref. numbers for the employee.

You can change an employee's PIN by clicking the icon:

Then enter the new number when prompted.

Switch to different sections of the form by clicking the tabs at the bottom.

5.1.2 Address

On this panel, enter the employee's contact details, including telephone number and email address. You can also enter alternative contact details if necessary.

5.1.3 Kin

This panel shows the contact details of the employee's next of kin, and can contain numerous contacts. To add a new contact, delete a contact, or amend the details of a contact, click **Edit**. You are then able to select **New**, **Modify** or **Delete**.

When adding a new contact, the address will, by default, be the same as the employee's own address. This can be changed if incorrect.

5.1.4 Doctor

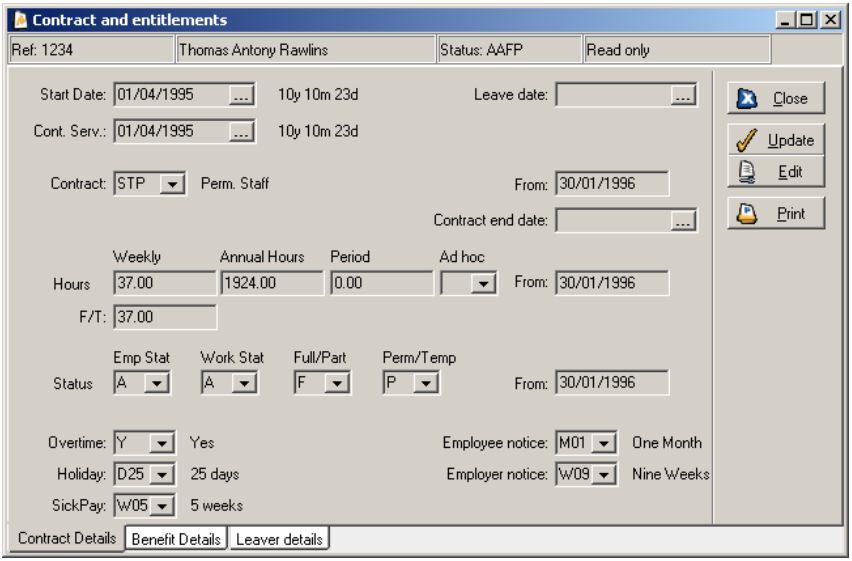
This panel contains details of the employee's doctor.

5.2 Contract and entitlements

This form can contain all information relating to an employee's contract details (start and leave dates, holiday and pension entitlements etc.). Click the icon:

This form has three panels - **Contract details**, **Benefit details** and **Leaver details**.

5.2.1 Contract details



The start date is the date the employee's contract starts.

The **Cont. Serv.** (continuous service) date is usually the same as the start date, but can differ in certain circumstances, such as when an employee has joined from a parent or sister company. This entry is the basis for such calculations as redundancy pay and entitlement to notice. (The latter is shown in the bottom right of the screen, and is calculated automatically when the continuous service date is entered.)

Select the employee's **Contract** type from the drop-down list. This affects the employee's entitlements to overtime, holiday and sick pay, which are shown in the bottom left of the screen, and are entered automatically in response to the type of contract selected.

In the **Hours** row, enter either the weekly or annual hours and the other value will be calculated automatically.

Only enter a value for the **Period** hours if your organisation calculates hours in a different way to hourly, weekly or annually.

In the **Ad hoc** box, only select 'Yes' if the employee is not contracted to work a fixed number of hours.

The **F/T** (full-time equivalent) hours figure should be entered for part-time employees, as it represents the standard full-time hours of an employee in the same job. The value entered allows the system to calculate a full-time equivalent salary on the **Pay details** form, i.e., what the employee would be earning if employed on a full-time basis.

The **Status** row allows you to define the working status of the individual:

Employment status - the system is designed to hold non-employed people as well as actual employees. This allows contractors, visitors and agency staff, among others, to be entered onto the system. The employment status will usually have been set by the system administrator to be calculated automatically, based on the type of contract selected:

A - 'Actual' is for current employees of your company.

N - 'Not actual' represents people such as contractors and visitors, who are on the system but not employees of the company.

L- 'Left' includes anybody who has ceased working for the company.

It is useful to be aware that as long as Autotask is running, the system will automatically change an employee's status to 'Left' when the leaving date is reached.

Work status - this refers to the current working status of the individual, e.g., 'Active work' for someone currently working, 'Seconded here' for a contractor or agency worker, or 'Maternity leave', among other possibilities.

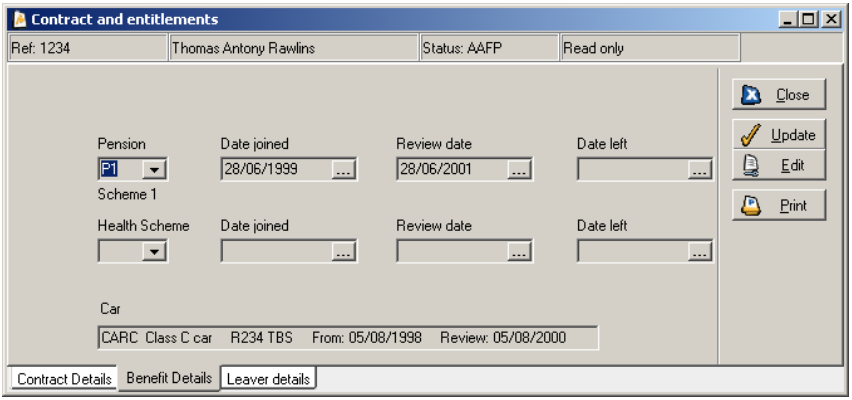
Full or part-time status - this is calculated automatically, depending on how many hours the employee works.

Permanent or temporary status - this should appear automatically, and will be related to the type of contract selected.

5.2.2 Benefit details

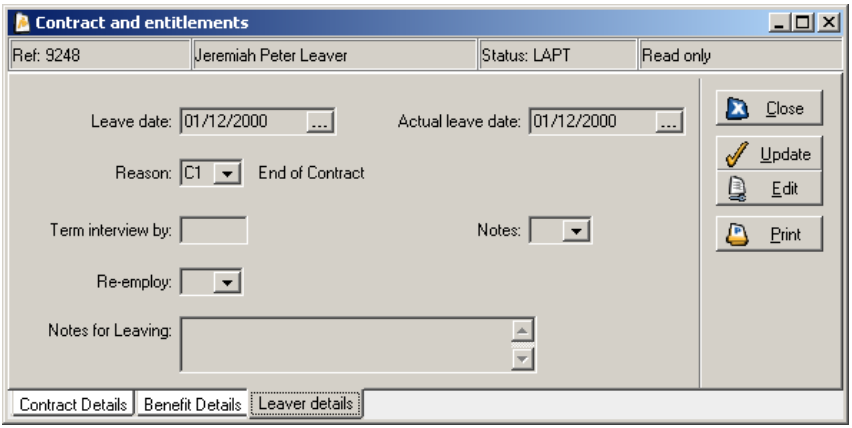
This panel holds details of the employee's pension and health scheme, if applicable.

If the employee has a company car, details will be shown on this form, although this information is taken from the entry in **Inventory details** (see page 77), and can only be altered on that form.



5.2.3 Leaver details

Complete this panel when the employee is to leave the company, or has already left.



Enter as the **Leave date** the date on which the employee's contract ends.

The **Actual leave date** may differ, as this is the date the employee physically leaves (the last date he or she is scheduled to work).

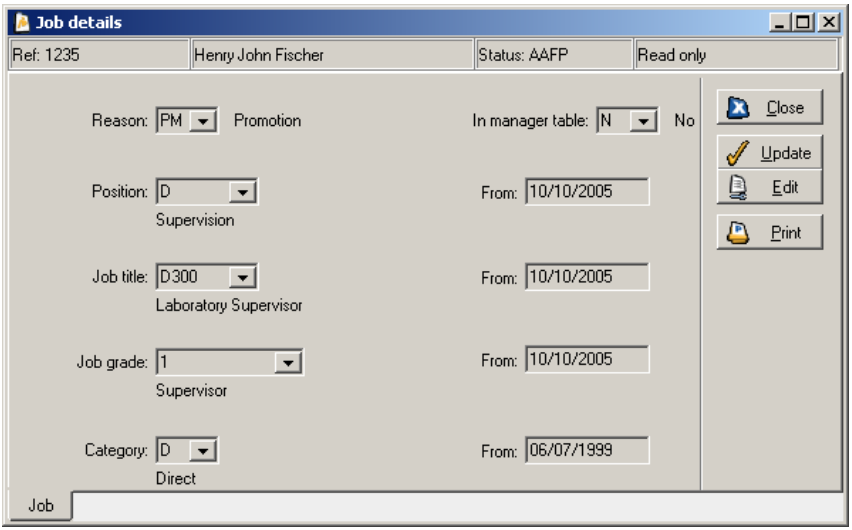
(The contract **Leave date** is automatically replicated on the **Contract details** panel (see page 64). Similarly, if a leave date has been entered on the **Contract details** panel, it also appears on the **Leaver details** panel.)

The other details are not essential for the running of the system, but may be entered for the records, if desired.

5.3 Job details

Select this icon:

to see further details about the employee's job (e.g., position, title, grade). A screen like this appears:



This panel will need to be amended as a result of any change in the employee's job details, so it is useful to document the **Reason** for the change. When entering the details for the first time, you will generally need to select 'New starter', or similar, but later changes may be due to promotion, transfer, etc., which can be recorded here.

Details should be entered for **Position**, **Job title** and **Job grade**. The selection of one entry may affect the options available in the other drop-down lists, so that, for example, a job grade of 'Supervisor' only allows certain job titles, associated with that grade.

The **Category** box refers to whether an employee is employed directly or indirectly (e.g., an employee may actually be employed by an agency, so would be defined as **Indirect**).

The **From** boxes show when the last change was made to each field. They cannot be altered manually.

The form also allows you to select whether or not the employee is **In manager table**. You will need to select 'Yes', not only if the employee has responsibility for other staff, but also if the employee is responsible for appraisal interviews, terminations, diary actions and similar. When selecting the manager responsible for any of these functions, you will only be able to select from those who have been included in the manager table.

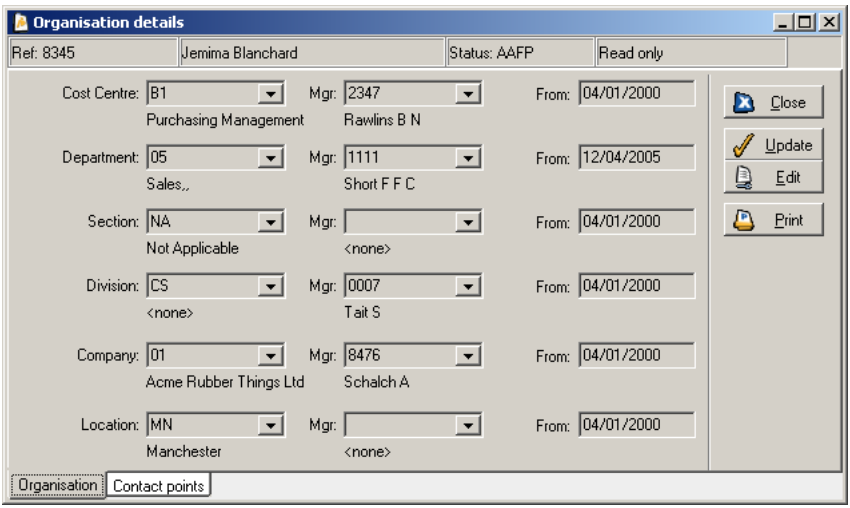
5.4 Organisation details

This form has two panels, the first displaying details of the employee's organisation (such as the employee's department or section), and the second showing contact details of the organisation.

To access the form, click the following icon:

5.4.1 Organisation

This panel looks similar to this:



Your system administrator will have set up the details specific to your own organisation, so that you can select the relevant options from the drop-down lists. Selecting an item from one drop-down list may affect the options available in another. For example, selecting a department may limit the choice of divisions.

Each of the manager drop-down lists contains all those who are included in the manager table, as defined on the **Job details** form.

5.4.2 Contact points

This panel allows you to keep work contact details for the employee, such as telephone extension, email address and other information.

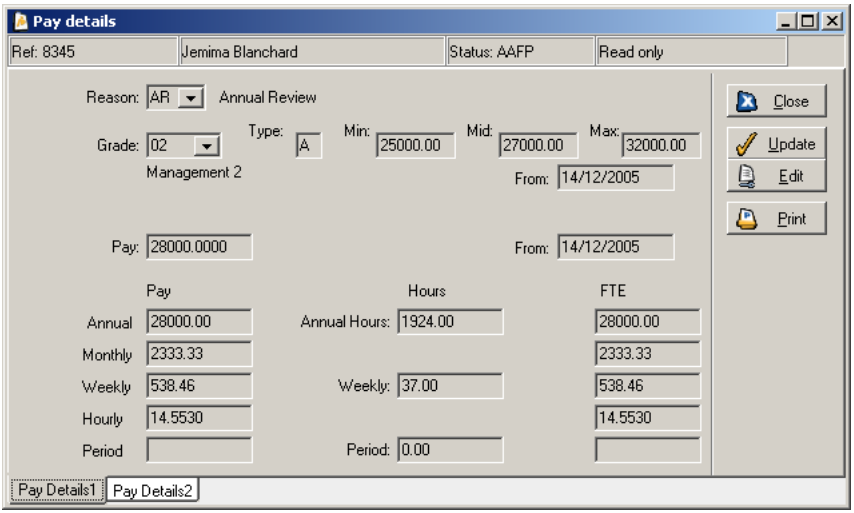
5.5 Pay details

This form contains all information relating to the employee's pay. The first panel has a breakdown of salary information, while the second has details of the pay method and employee's bank details.

To open the form, click the icon:

5.5.1 Pay details 1

The first panel appears like this:



To enter an employee's pay details, first select a **Reason**. If you are entering the details for the first time, this could be 'New starter', but otherwise the employee may receive a pay rise annually or due to a promotion.

It is important to select the appropriate **Grade** from the drop-down list. This affects the pay **Type** to the right, and the values for minimum, middle and maximum pay. The system administrator will have set up the relationship between the **Grade** and the **Type** of pay.

In the **Pay** box, the value should be entered with respect to the type. In the example above, the pay **Type** is annual, so the figure in the **Pay** box is the employee's annual salary. However, another pay **Grade** may have an hourly **Type**, in which case you would enter the hourly wage in the **Pay** box.

The **Min**, **Mid** and **Max** figures serve as guidelines when entering the **Pay** value, and do not prevent a value outside the range being entered if required.

The values in the three **Hours** boxes should be set up on the **Contract details** form, although they can also be amended on this form. They affect the calculations in the **Pay** column to the left, which work out how much the employee earns in each of the times shown.

The **FTE** (full-time equivalent) column on the right is only used for part-time workers. While the **Pay** column on the left shows the worker's actual pay amounts, the **FTE** column displays what the employee would be earning if employed full-time. The calculation for this column relies on the **F/T** hours value entered on the **Contract details** form.

5.5.2 Pay details 2

This panel holds the employee's bank details, if necessary, and the payment method, along with other payment and tax details required for the employee.

5.6 Training and qualifications

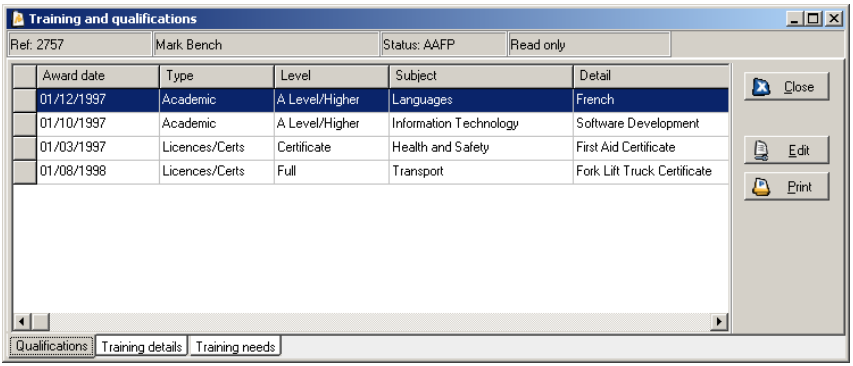
To open this form, select the icon:

The three panels on this form allow you to keep a record of **Qualifications** the employee has earned, **Training details** (e.g., courses the employee is taking, or skills being learnt), and **Training needs** (courses the employee ought to take, or skills that need to be acquired).

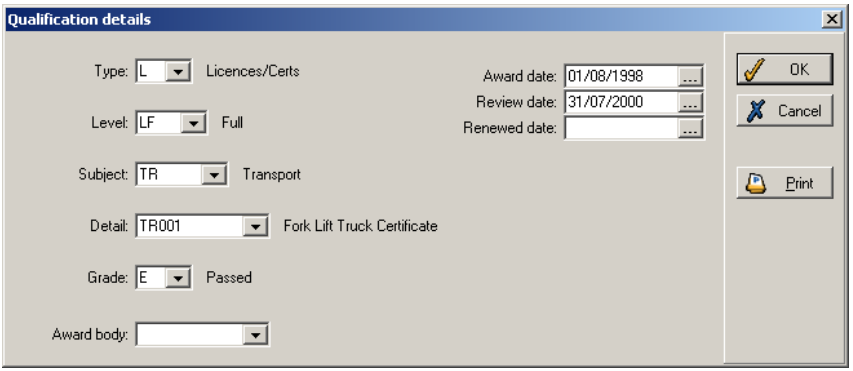
5.6.1 Qualifications

A qualification shows that the employee has reached a recognised level of skill, expertise or knowledge. Your system administrator will have set up the different types of qualification that can be entered. They can include academic or vocational achievements, experience or skills gained, or a defined level of competency, among other things.

The following table is shown, containing brief details of the employee's qualifications:



To see further information, or to amend the details of a qualification, click the **Edit** button. Then click **Modify**, to display this form (an empty version of this form is used when you choose to add a **New** qualification):



Select the required details from the drop-down lists. Your system administrator may have set up the categories so that, for example, selecting a certain **Type** of qualification (e.g., Academic) limits the options for the **Level**, (e.g., PhD).

In the **Subject** box, the broad subject area (e.g., engineering) may affect the options available for the more specific **Detail** (e.g., mechanical engineering).

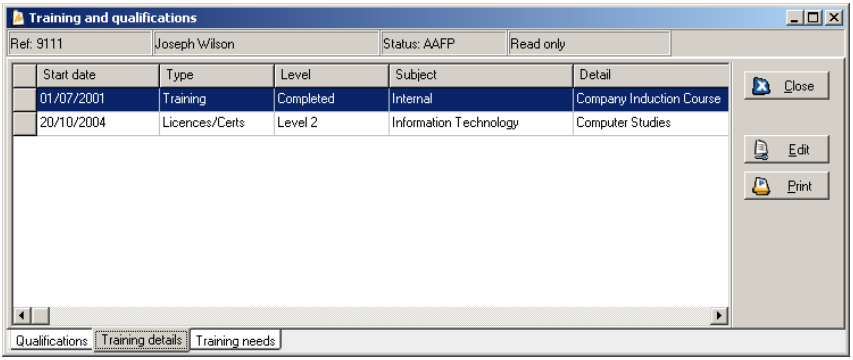
The **Grade** the employee achieved should be selected if appropriate to the qualification, as should the **Award body**.

The date the qualification was awarded should be entered. You might also need to enter the dates the qualification needs to be reviewed or renewed.

You can also choose to **Delete** a qualification, or to **Transfer** a qualification to one of the other two panels on the form (for details on this, see **Transfer records**, page 75).

5.6.2 Training details

This panel holds information about courses and qualifications the employee is currently working towards:



This is similar to the **Qualifications** panel, but when modifying or adding a training course, you should also enter the **Start date** of the course, and the date of **Completion**, if the employee has now completed the course or if it is known in advance. The **Review** date refers to when the training may need to be reviewed.

5.6.3 Training needs

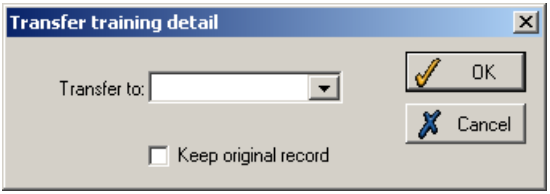
This panel contains information of any training the employee requires. The layout is the same as the **Training details** panel, and you can enter and amend details in a similar way.

While most of the details to be entered are the same, the **Grade** entry is different, being used instead to represent the urgency of the requirement, with options such as 'Essential' and 'Useful'.

You can use the date boxes to indicate when the training should start and finish, and be reviewed.

5.6.4 Transfer records

Records can be transferred in any direction between these three panels. For example, once training has been completed, the record on the **Training details** panel can be moved to **Qualifications**. To do this, select the record to be transferred, and click the **Edit** button of the panel it is currently held in. Then click the **Transfer** button, to produce this form:



Use the drop-down list to select the panel where the record should be transferred to. If you wish, tick the box to **Keep original record** - this means that it will be shown in both panels. Click **OK** to transfer the record.

5.7 Event records

This form has five panels, which contain details about different types of event or meeting. It is used to record details and notes about meetings, and to inform the diary to show reminders of when a meeting is to be held.

To access this form, click the icon:

The panels on a standard system are:

Appraisal details

Discipline details

Grievance details

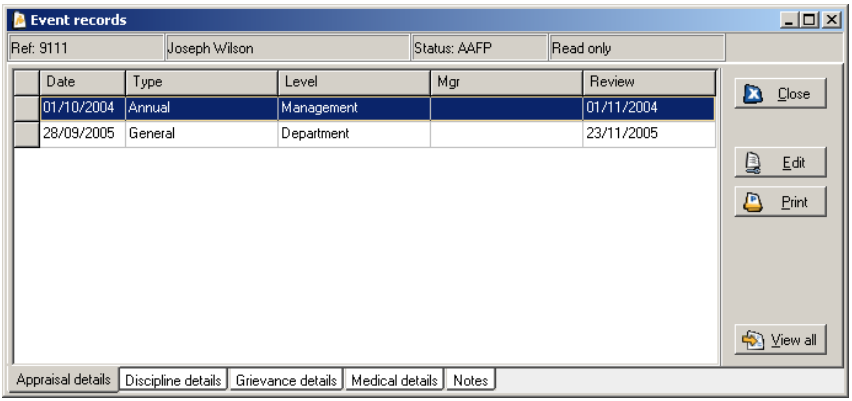
Medical details

Notes

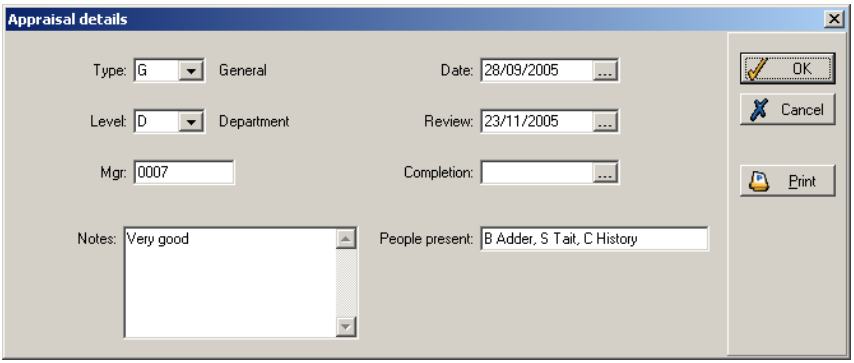
All the panels work in the same way.

Note that, when this form is first opened, you will not be able to see any completed events. If you have the appropriate security level, you may click on the **View all** button to display completed events as well. This option will not be available if you do not have the security level required.

First, you will see a table with basic details of all events of the relevant type, in this case appraisals:



Click the **Edit** button, and you can add a new record, edit an existing record, or delete a record. Then choose **Modify** to produce this form (a blank version of this form is used for adding a **New** record):



This window allows you to enter any necessary details and notes about the event.

You will be able to select a **Type** and a **Level**, which will depend on your system settings. When selecting the manager responsible for the event, you can choose from all those in the manager table (as entered on the **Job details** form).

The **Review** and **Completion** dates can be entered if appropriate, and the other information should be filled in if necessary.

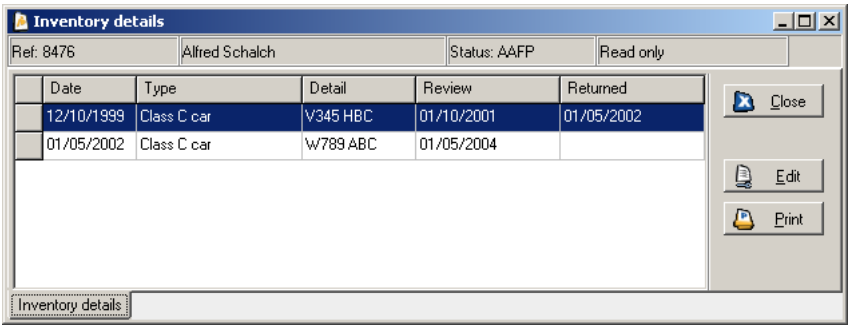
5.8 Inventory details

Open this form by clicking:

This form maintains a record of any company items in the possession of the employee (company cars, locker keys, safety shoes, etc.).

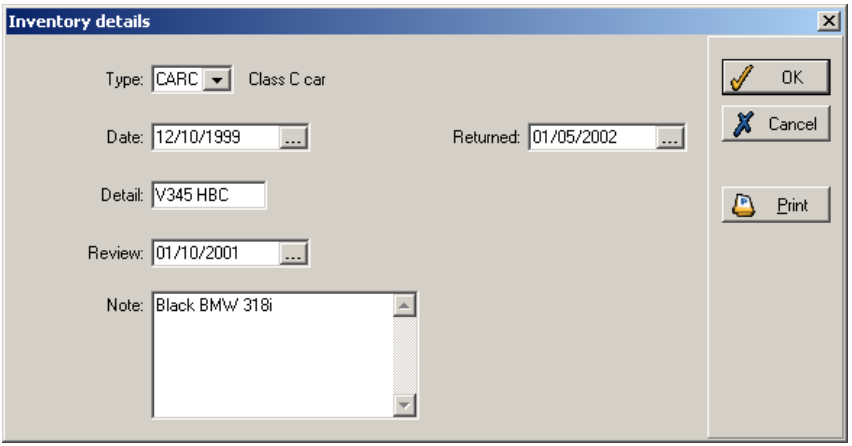
The details stored on this form are employee-specific, which means that this section should not be used to record and allocate all company equipment.

This table appears, displaying details of all company property used by the employee:



Click the **Details** button to the right to view the following pop-up screen. A blank version of the same form appears when you wish to **Add** a new inventory item:

Click the **Edit** button, and you can add a new item, edit an existing item, or delete an item. Then choose **Modify** to produce this form (a blank version of this form is used for adding a **New** item):



The options available on the drop-down list marked **Type** will have been defined by your system administrator.

The **Date** refers to the date the employee received the item.

The above item, a company car, has been returned, but a record is retained on the system. If an item is currently in use, a **Review** date can be set, and a date entered for when the item is to be **Returned**.

The **Detail** box can contain any identifying features (in this case, the car's registration number). Any further information can be entered into the **Note** box.

NB: Details of company cars are also displayed on the **Benefit details** panel of the **Contracts and Entitlements** form, although they can only be added and edited on the **Inventory Details** form.

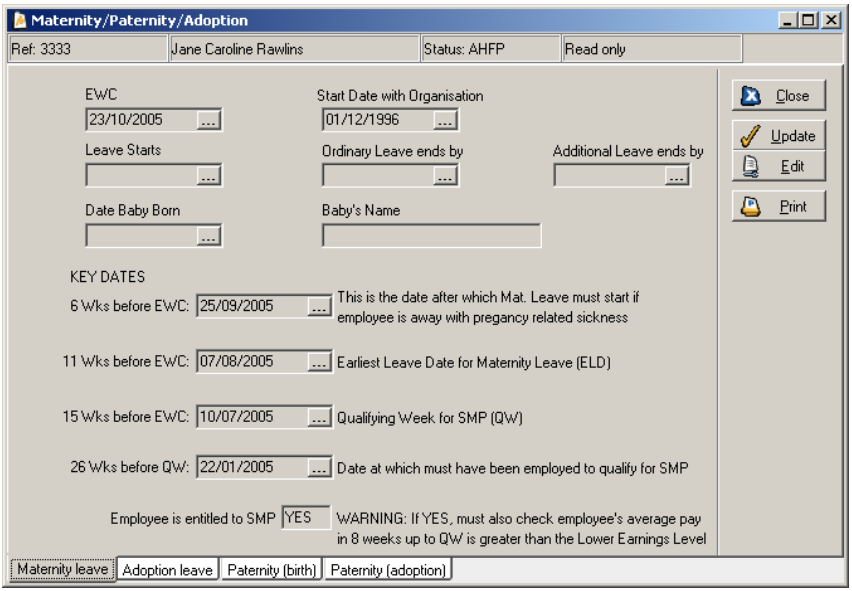
5.9 Maternity/paternity/adoption

The following icon is used to open this form:

There are four panels referring to different types of leave: **Maternity**, **Paternity (birth)**, **Adoption leave**, and **Paternity (adoption)**.

5.9.1 Maternity leave

The following panel contains all information required for an employee's maternity leave:



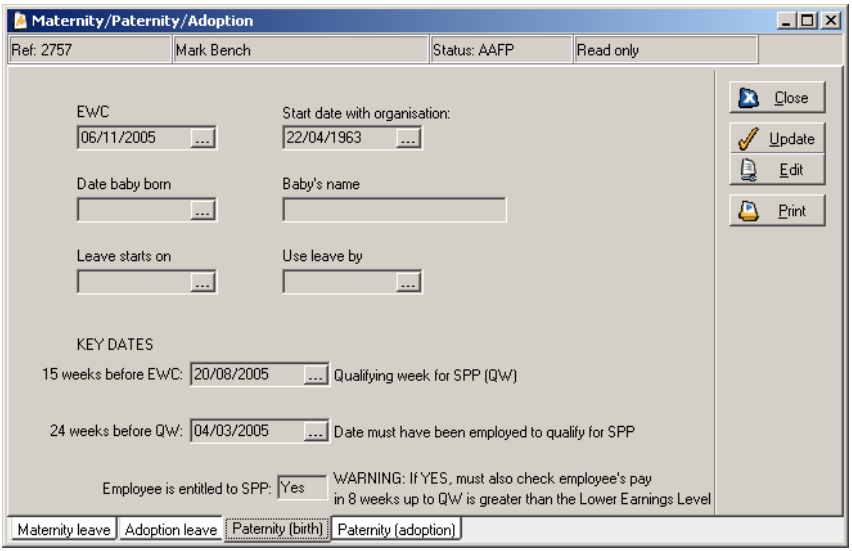
The **Start date with organisation** is taken automatically from the **Continuous service** date in the **Contract details** form. It is used to determine the employee's entitlement to leave.

When you enter the date for the **EWC** (expected week of confinement), the system automatically calculates and enters the **Key dates** for the maternity leave.

You then only have to enter the actual date the **Leave Starts**, and the end dates of ordinary and additional leave. Please refer to regulations currently in place for guidance on which dates to enter here.

5.9.2 Paternity (birth)

This panel is relevant to men about to become fathers, and to female partners of women who are about to become mothers.

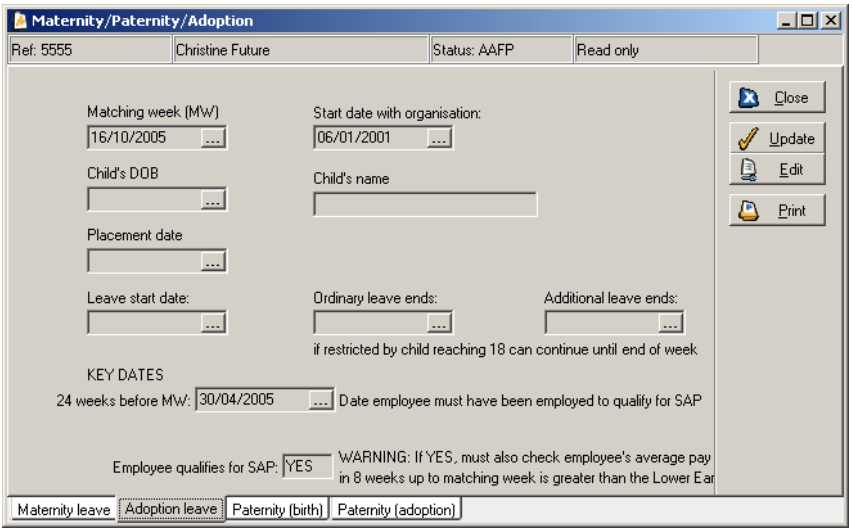


This functions in the same way as the **Maternity leave** panel, page 79, except that the only leave dates which need to be entered are the dates the leave starts on and must be used by.

Please refer to regulations currently in place for guidance on entering the start and end dates of paternity leave.

5.9.3 Adoption leave

This panel applies to an employee who is adopting a child and wishes to take full adoption leave. The following panel is displayed:



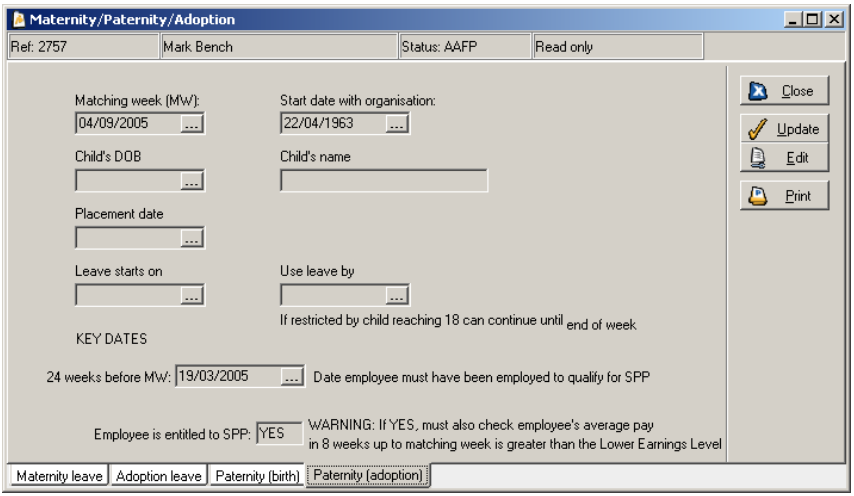
The **Start date with organisation** is taken automatically from the **Continuous service** date in the **Contract details** form.

Enter the **Matching week**, and the **Key dates** entries will be calculated automatically.

It is then important to enter the **Leave start date**, and the end dates of ordinary and additional leave. Refer to current regulations for guidance on dates to enter here.

5.9.4 Paternity (adoption)

This panel applies to employees who adopt a child with a partner, when the partner takes the full adoption leave:



This functions in exactly the same way as the **Adoption leave** panel, page 81, except that the only leave dates you need to enter are the **Leave starts on** and **Use leave by** dates. Refer to current regulations for guidance on dates to enter here.

5.10 Summary information

The **Summary information** screen can be opened by clicking this icon:

This allows you to view and edit various details from different forms and panels, summarised on one form for convenience.

The panels on this form serve as an additional source of information and are customised for each system, so that they are specifically designed to be relevant to your organisation.

As there are no standard panels, this form is not documented here.

CHAPTER 6

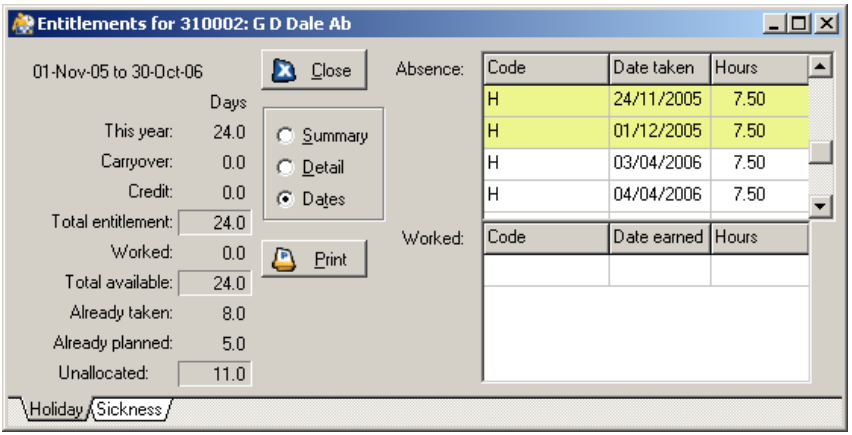
ENTITLEMENTS

6 Entitlements

6.1 View entitlements

To check the value of the employee's entitlements, click the icon:

The form that is displayed looks similar to this:



If more than one type of entitlement is allocated to the employee, there will be additional tabs at the bottom of the form which, when clicked, will display details of the other entitlements.

Entitlements may be displayed in either days or hours.

On the left of the form, the **Summary** section of the form lists the following information:

This year - the amount of the entitlement allocated to the employee in the current year.

Carryover - any days or hours that the employee had left over from the previous year, and that are added to the employee's total entitlement.

Credit - any days or hours that were credited to the employee, and added to the total entitlement.

Total entitlement - the values of the three above categories added together, to give the original total for the year.

Worked - the amount of the entitlement earned by the employee (e.g., if an employee who works on a Bank Holiday is granted an extra holiday in the future).

Total available - the value of 'Total entitlement' added to the 'Worked' figure, to give the overall total of the entitlement.

Already taken - the amount of the entitlement that has already been taken by the employee.

Already planned - the amount planned to be used in the future.

Unallocated - the amount left for the employee to use.

If the **Detail** view is selected, two tables, 'Absence' and 'Worked', are displayed on the right of the form. The 'Absence' table displays the amount of the entitlement that has already been taken and already planned. The 'Worked' table shows the amount of the entitlement that has been earned. If your company allows employees to work days in lieu (e.g., if working on a Bank Holiday earns the employee an absence to be taken at another date), they will be shown in this table.

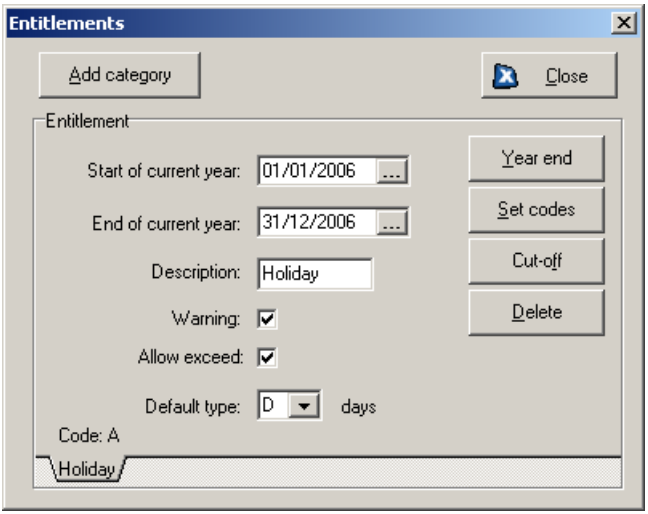
The **Dates** view (as seen in the example on page 86) also has two tables, containing more information about the entitlements. The 'Absence' table shows the date and number of hours of each individual day. The days already taken are highlighted in yellow, while those planned for days in the future have a white background. The 'Worked' table displays the same information about the days earned by the employee.

NB: If you wish to alter any aspects of the employee's entitlements, use the **Contract details** panel of the **Contract and entitlements** form (see page 64).

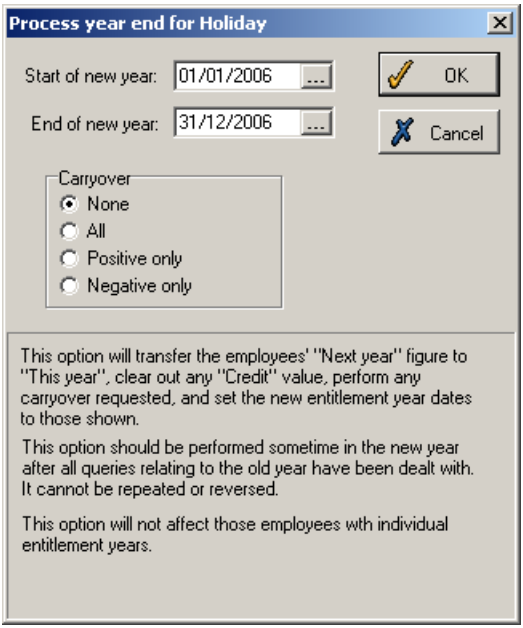
6.2 Year end procedure

This procedure enables the user to re-set all entitlements for the start of a new year, automatically calculating any entitlement to be carried over. The actual year used can vary for each entitlement, and does not have to run for twelve months (its dates will have been set up previously by the system administrator).

To perform the year end procedure, select the **Entitlements** option from the **System** menu on the main toolbar. The following form will be displayed:



The tabs at the base of the form allow you to select the required entitlement type. When you have done so, click the **Year end** button to display this form:



The example above shows the holiday year end procedure, as the year end procedure must be performed separately for each entitlement. The start and end dates of the new processing year are entered automatically, but use the calendar button if they need to be changed.

You must then select a **Carryover** option.

- choose 'None' if you do not want any holiday entitlement to be carried over to the new year;
- select 'All' if you want all types of holiday entitlement to be carried over;
- 'Positive only' will only carry over any entitlement still owing to the employee from the previous year;
- 'Negative only' will only carry over any negative entitlement (i.e. entitlement that has been taken away from the employee).

Click **OK**, and the year end procedure for that particular entitlement will be performed. HR Manager will automatically alter the associated start and end dates on the **Entitlements** form.

CHAPTER 7

EMPLOYEE ABSENCE

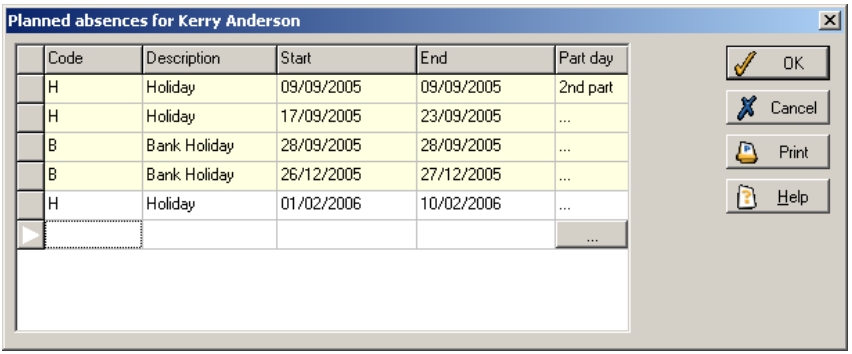
7 Employee Absence

7.1 Employee's planned absence

To add a planned absence for an employee, select **Planned absence** from the **Employee** menu. Choose either **Individual,** for a single absence, or **Repeat**, for an absence repeated at regular intervals.

7.1.1 Individual

The following form will be displayed, showing all previously planned absences:

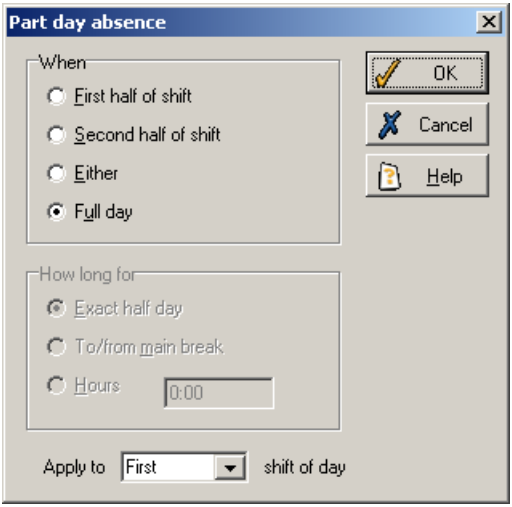


The rows with a coloured background show absences in the past, while those with a white background are planned for the future.

To add a planned absence for the employee, use the empty row at the bottom of the table. Click in the **Code** column to display a drop-down list of absence types. Select the required type, and the **Description** column will be filled in automatically. Click in the **Start** column to display the calendar button:

which can be used to select the start date of the absence. The end column will then automatically take the same date as the start, to signify a single-day absence. If this is not appropriate, i.e., the absence is for more than one day, change the entry in the **End** column, also using the calendar button.

If the absence is for part of a day, click the button in the **Part day** column, to bring up the **Part day absence** form: (**NB**: Part day absences can only be planned for single-day absences.)



Select which part of the shift the employee's absence is planned for. If **Either** is selected, the absence can occur at any point in the day.

When you have selected the part of the day, now choose the duration you wish TMS to record for the absence, in the **How long for** section:

Exact half day - means the employee is to be absent for the full first or second part of the shift.

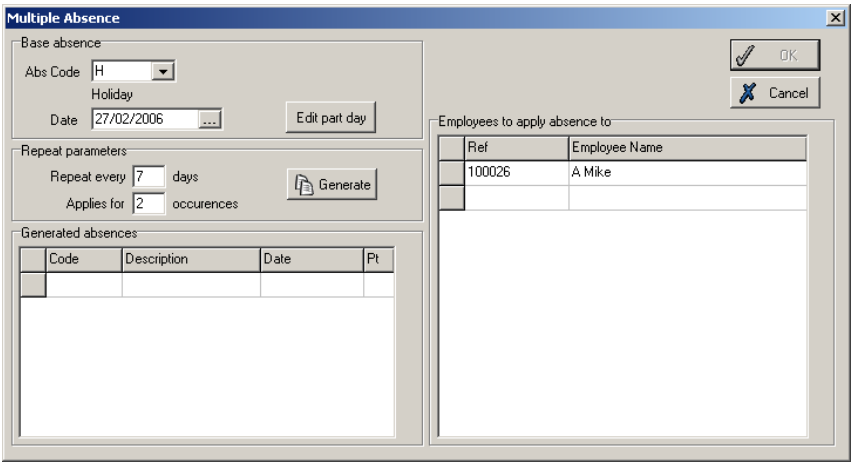
To/from main break - means the absence is either from the start of the shift to the main break (usually lunch), or from the main break to the end of the shift. This can differ from the **Exact half day** figure, particularly if the main break is not precisely in the middle of the shift.

Hours - select if the absence is for a set length of time, and enter the duration in the box provided.

If the employee has more than one shift scheduled for the day, select from the drop-down list which shift the absence is to **Apply to**.

7.1.2 Repeat

To enter a single-day absence that will be repeated at regular intervals (e.g., weekly training), select **Repeat** and the following form appears:



In the **Base absence** section, enter the details of the first absence day in a similar way to entering a single absence (see page 92). Select the absence type in the **Abs code** box, and select the date for the first absence. If the repeat absence is for part of the day, click the **Edit part day** button and use the **Part day absence** form (see page 93).

The **Repeat parameters** section should be used to select how many times, and at what intervals, the absence should be repeated. In the **Repeat every...days** box, select the interval between the absences (e.g., if you are creating a weekly absence, such as every Monday for a number of weeks, enter '7' in this box).

The **Applies for...occurrences** box should contain the total number of occasions the absence is to be taken, including the first instance (so if the employee is to be absent for four consecutive Mondays, enter '4').

When you have entered the details of the absences, click the **Generate** button:

The absences you have planned will appear in the **Generated absences** box below. If the absences displayed are incorrect, amend the details that you entered to create them, and generate again.

The box on the right, **Employees to apply absence to**, displays each selected employee.

Click **OK** to save the repeated planned absence you have created, or **Cancel** to discard the absence.

7.1.3 Delete a planned absence

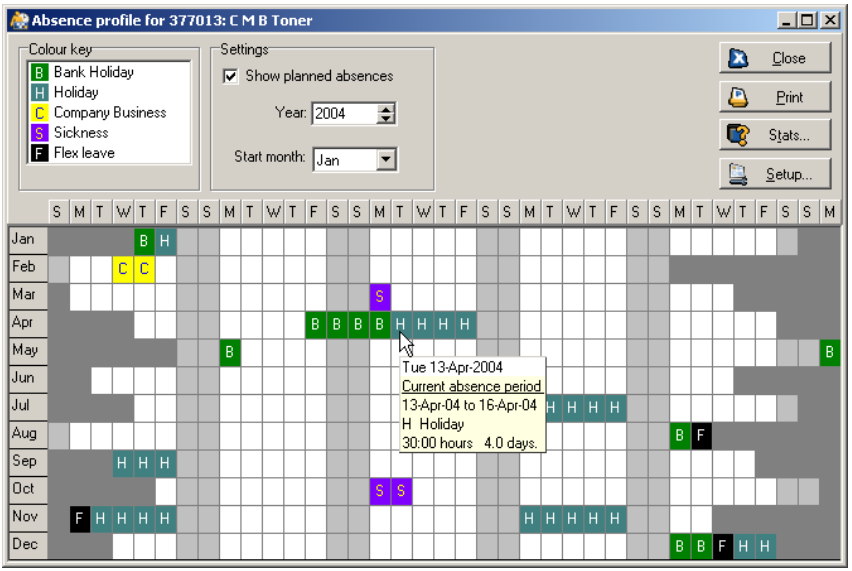
If an absence is no longer required, it can be deleted, as long as it has not yet been taken. Within the employee's **Planned absences** form, click on the white arrow to the left of the absence to be deleted, and this form will appear:

Select **Delete entry**, and click **OK**, and the absence will be removed.

7.2 Absence profile

This page displays all the absences the selected employee has taken in the past and planned for the future, and allows you to add planned absences for the employee.

Click this icon on the **Employee** toolbar, and a screen like the following appears:



Should you wish to view a past or future period, select the year using the arrows, and the start-month from the drop-down list.

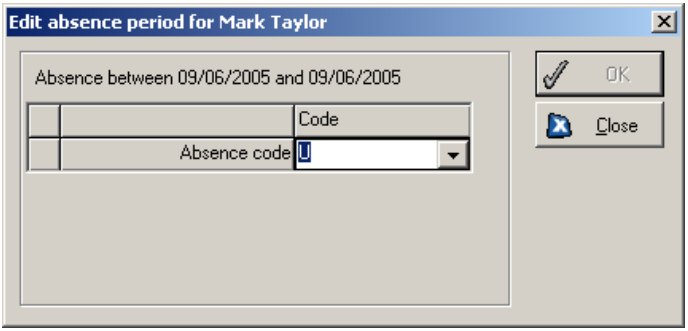
Make sure the **Show planned absences** box is ticked if you wish the table to display absence periods planned for the future, as well as those already taken.

The different types of absence are marked by their absence codes, and appear in different colours, identified by the key above the table. When the cursor is moved over one of the absence days, a pop-up box appears displaying the details of the absence. Days with more than one type of absence will show details of each in the pop-up box.

The profile can display all types of absence, or some categories can be excluded. To add or remove absence categories, click the **Setup** button and select the categories in the manner described in **Select available items**, page 39.

To add a new planned absence, right-click the mouse anywhere in the profile, and select **Edit planned absences** from the menu that appears. This takes you to the **Planned absences** form, which can be edited in the usual way (see page 92).

If you need to edit the details of a past absence, right-click on the required absence period to bring up a menu, from which you should select **Change absence period**. The following form is displayed:

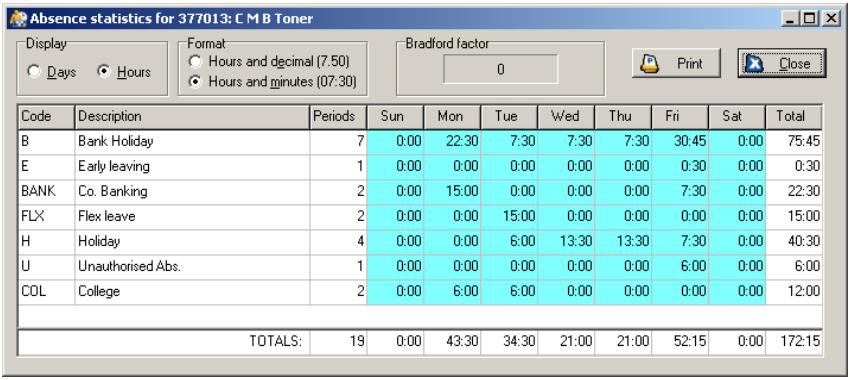


Select a new absence code from the drop-down list, and click **OK**. The absence now appears in the profile with its new code.

Statistics

To view the employee's absence statistics, click this button:

The following table appears:



Code	Description	Periods	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total
B	Bank Holiday	7	0:00	22:30	7:30	7:30	7:30	30:45	0:00	75:45
E	Early leaving	1	0:00	0:00	0:00	0:00	0:00	0:30	0:00	0:30
BANK	Co. Banking	2	0:00	15:00	0:00	0:00	0:00	7:30	0:00	22:30
FLX	Flex leave	2	0:00	0:00	15:00	0:00	0:00	0:00	0:00	15:00
H	Holiday	4	0:00	0:00	6:00	13:30	13:30	7:30	0:00	40:30
U	Unauthorised Abs.	1	0:00	0:00	0:00	0:00	0:00	6:00	0:00	6:00
COL	College	2	0:00	6:00	6:00	0:00	0:00	0:00	0:00	12:00
	TOTALS:	19	0:00	43:30	34:30	21:00	21:00	52:15	0:00	172:15

(The statistics are calculated for the twelve-month period selected for the profile, and only include the absence types that are shown on the profile. Only processed absences are taken into account, and not planned future absences.)

The table shows the occurrence of each different type of absence, with the 'Periods' column showing the number of absence periods for each type (e.g., a two-week holiday would be treated as one absence period, as would be a single occasion of lateness).

The actual amounts of absence can be calculated either in days or hours (if 'Hours' is selected, choose also whether to display hours and minutes or hours and decimals).

To the right of the table, the **Total** column contains the total amount of each type of absence taken by the employee over the course of the year.

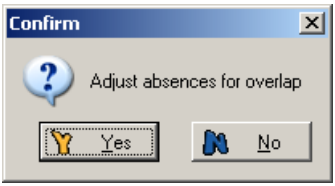
The **Totals** row underneath the table shows the total amount of absence taken on each day of the week, with the total amount of absence shown in the bottom-right corner.

7.3 Error messages and warnings

There are two common error messages or warnings which appear when entering planned absences to HR Manager.

Adjust absences for overlap

The following warning may appear when you click **OK** to save your changes to the employee's **Planned absences** form:



This means that one or more of the absence periods that have been entered overlaps with another (either another period that has just been added, or one that was entered previously).

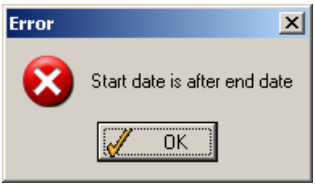
Click **Yes**, and HR Manager will automatically adjust the absences. This means that, if the overlapped period has two different absence codes entered, the most recently entered will be saved.

For example, you have previously entered an absence on the 3rd of the month with a code of 'Training'. You now enter an absence from the 3rd to the 5th with a code of' 'Holiday'. If you allow HR Manager to adjust the absences automatically, the original 'Training' absence will be cleared, leaving the 'Holiday' period from the 3rd to the 5th.

Click **No**, and you will have to adjust the absences manually. You will not be able to save the form until the overlap has been removed.

NOTE: System administrators can use the system preferences to set certain codes to be 'static', meaning they will not be overwritten in this fashion. For example, Bank Holiday may be a 'static' absence type in your system. This allows a holiday absence to be entered for a full week in which one day has previously been set as a Bank Holiday, and the Bank Holiday will be retained, with the holiday period applying to all the other days in the week.

Start date is after end date



If the end date of the absence period you have entered is after the start date, the absence cannot be saved. Change the absence so that it has the correct details and then save.

CHAPTER 8

AUTHORISE REQUESTS

8 Authorise Requests

To check requests made by members of the selected group, click:

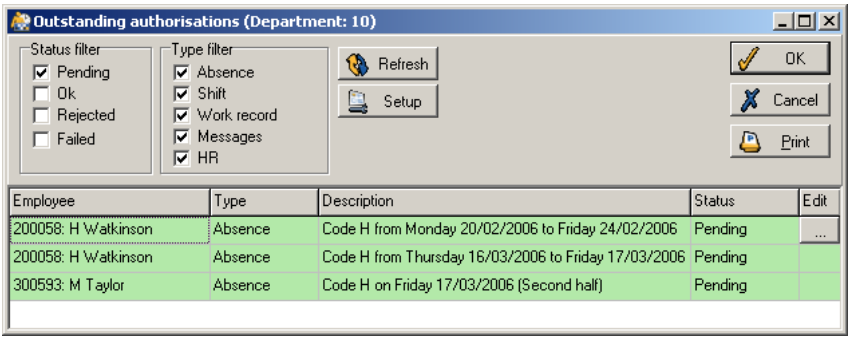
To restrict the list to certain requests, select only the boxes required for the **Status filter** and **Type filter**, or tick all boxes to view all requests.

There are four options in the **Status filter**:

- 'Pending' - requests that are waiting to be accepted/rejected;
- 'OK' - requests that have been accepted;
- 'Rejected' - requests that have been refused;
- 'Failed' - this indicates a system error, e.g. if an employee request for holiday is in the past (because the supervisor has not authorised the request in time), the status will automatically be set to 'Failed' when the supervisor tries to accept this request.

The **Type filter** has five options, but only two are applicable to HR Manager systems:

- 'Absence' - requests for planned absence;
- 'HR' - this is a request made by the employee to change his or her details, as recorded on the system.

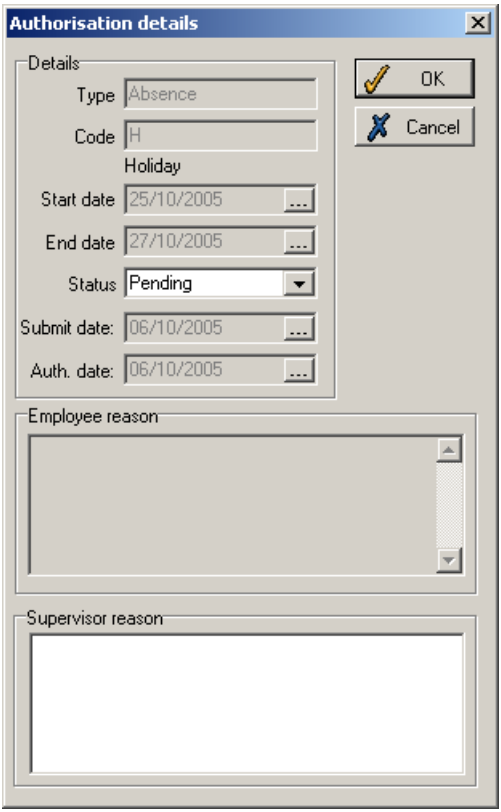


Different statuses of request will appear in the table in different colours - to alter their appearance, click the **Setup** button and change the text colour or background colour of each status.

Deal with a request by changing its status in one of two ways. Click in the **Status** column of the appropriate request to display a drop-down list, from which you may select the new status. (**NB**: You cannot change the status of a 'Failed' request, as it is set automatically.)

To view more details of a request, click the button that appears in the **Edit** column when a request is selected:

You will see something like the form below:



(This form is for a planned absence request. HR request forms are similar, but show the altered details instead of the **Employee reason** box.)

Authorise the request by changing the **Status** from the drop-down list. If you wish, you can enter a comment in the **Supervisor reason** box.

Click **OK** to return to the table, where the request will display its new status.

To save any changes you have made to requests, click **OK**, or to discard the changes, click **Cancel**.

CHAPTER 9

GENERATE LETTERS

9 Generate Letters

Any HR or Personnel department will know how important it is to have a facility that allows for the automatic generation of letters for all or a range of employees.

Using HR Manager, you can generate letters from pre-defined templates. These templates are usually set up by the system administrator, meaning that all you have to do is to select which employees the letters should be generated for. Letters can be generated for individual employees, or for any required range of employees.

The letters can be printed or emailed, and a copy can be kept on the system as well.

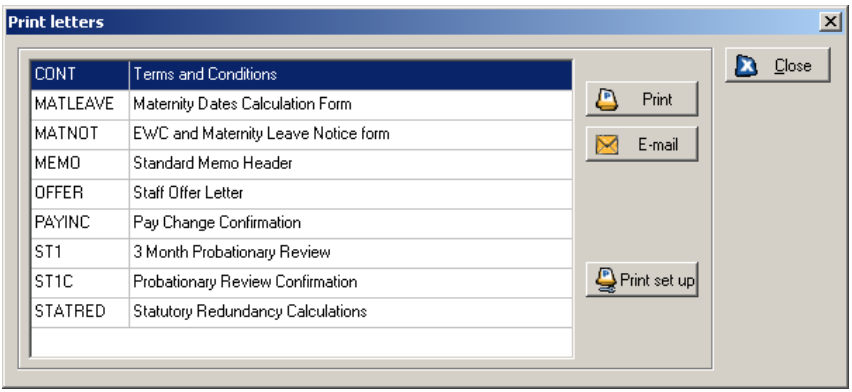
9.1 Print letters

When printing letters, use the **Print set up** button to make sure that the letter will be printed to the correct printer, and that the settings are as required.

9.1.1 Print a letter for a single employee

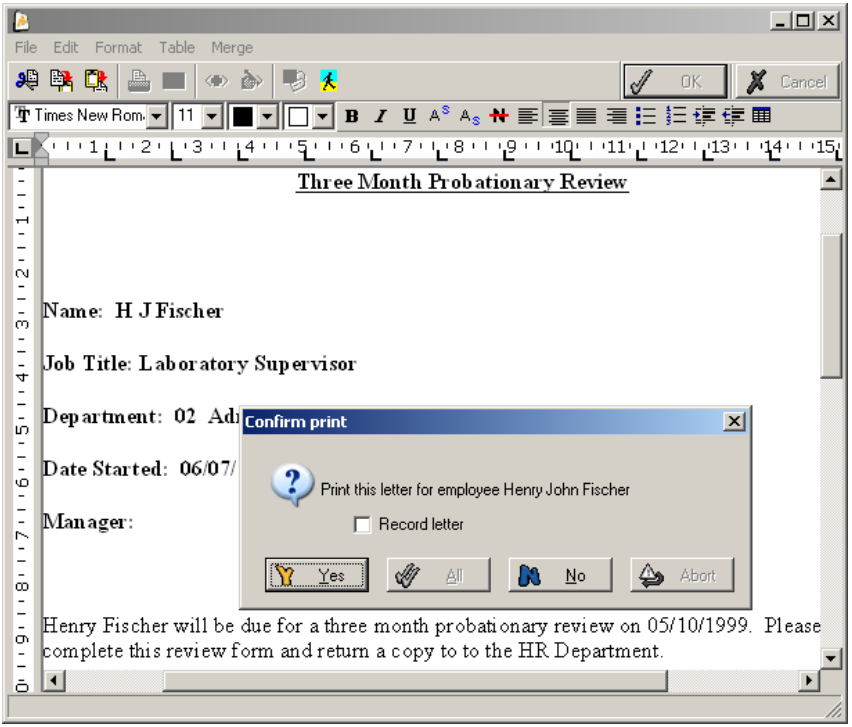
First, ensure the relevant employee is selected in the **Employee** drop-down list.

Select **Single letter** from the **Letters** menu. A table like this is displayed:



Select the required letter and click **Print**.

The system searches the system for the selected employee's details and inserts the relevant information (name, address etc.) into the letter. The relevant letter will then be displayed so it can be checked.



If necessary, the letter can be modified at this point. Move the **Confirm print** box out of the way and make any necessary changes.

Before you print the letter, choose whether or not the letter should be recorded. If you tick the **Record letter** box, the letter will be saved to the employee's **Files** page (see page 55 for details).

Now click **Yes** to print the letter.

A pop-up box informs you when the process is finished.

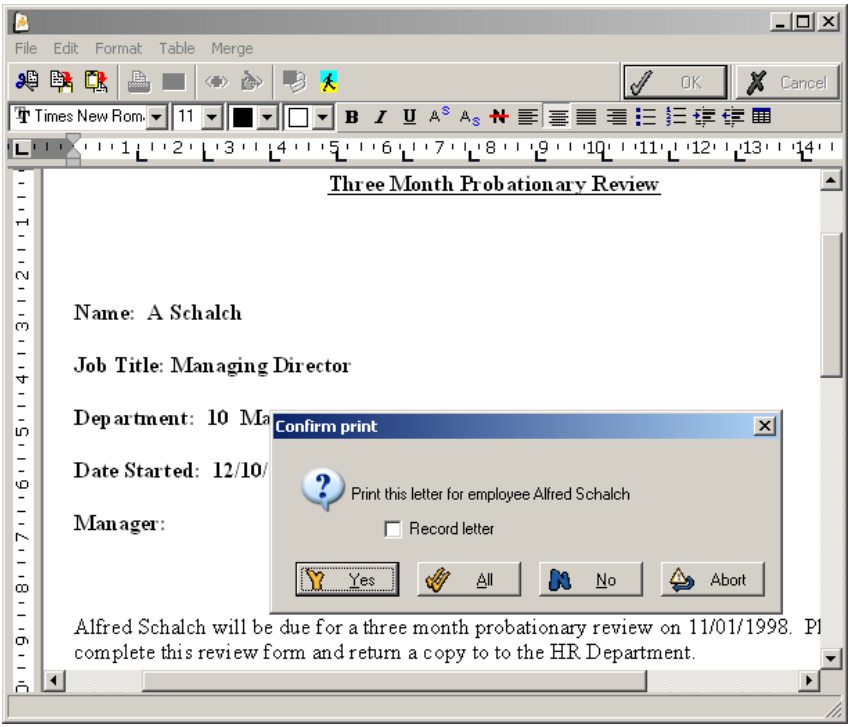
9.1.2 Print a letter for a range of employees

Select **Print letters** from the **Letters** menu and you will see the same **Print letters** form as used for printing a single letter (see page 106). Select the required letter and click **Print**.

The **Select range** form will be displayed, allowing you to choose which employees the letter should be generated for (for details, see **Select range**, page 34).

NB: Some letters may have additional selection criteria set up within the template (e.g., the letter may have been set up to be sent to any employee over the age of 30, or may only be sent to current employees). When you select the range, HR Manager will check through all employees within this range and only create a letter for those who match the selection criteria.

Once the required range has been defined, the letter will be displayed for the first employee in the range and a box will appear with a number of options:



Move the box out of the way if the letter needs to be amended in any way.

As with printing a single letter, ticking the **Record letter** box retains a copy in the employee's **Files** section (see page 55). There are four buttons on the form:

- **Yes** - if you click this, the letter will be printed for this employee, and then the letter for the next employee in the range will be displayed, with the same **Confirm print** box. This allows you to check individual letters before printing.

- **All** - click this and the letter will be printed for this employee and for all other employees in the range without the **Confirm print** box being displayed again for the other employees.

- **No** - click this if you do not want to print the letter for this employee. The letter for the next employee in the range will then be displayed, with the same **Confirm print** box.

- **Abort** - click this if you do not want to print the letter for this employee, or any other employee, as you will return to the **Print letters** table.

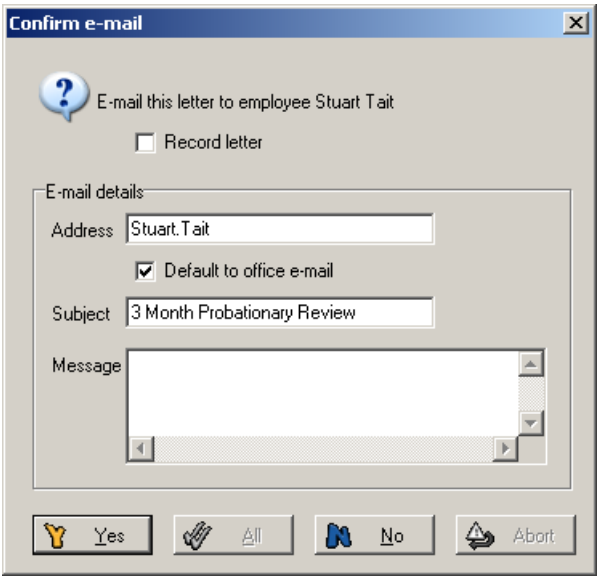
9.2 Email letters

NOTE: You can only use this function if your system uses Microsoft Outlook or Outlook Express.

9.2.1 Email a letter for a single employee

First, ensure you have selected the required employee on the **Employee** drop-down list.

Select **Single letter** from the **Letters** menu. The same **Print letters** table appears as that used for printing letters. Select the letter you wish to send and click on the **Email** button. The selected letter will appear, together with this form:



You can check the letter before sending, and make any amendments if necessary.

If you tick the **Record letter** box, a copy of the letter will be saved to the employee's **Files** page (see page 55 for details).

Depending on your settings, the employee's email details will be entered automatically, although this can be changed if necessary. The letter will be sent as an attachment with the email, and you can enter a message to accompany the document, if you wish.

Click **Yes** to send the email, or **No** to cancel and return to the **Print letters** table.

9.2.2 Email a letter to a range of employees

Select **Print Letters** from the **Letters** menu. Select the required letter, and click on the **Email** button. You will then see the **Select range** form, which should be used to select the employees to receive the email (see page 34 for details).

You will see the **Confirm e-mail** box, which works in the same way as for emailing a letter to a single employee (see page 110), except there are four buttons at the bottom of the form:

- **Yes** - if you click this, the letter will be emailed to this employee, and then the letter for the next employee in the range will be displayed, with the same **Confirm e-mail** box. This allows you to check individual letters before sending.

- **Yes to all** - click this and the letter will be sent to this employee and all other employees in the range without the **Confirm e-mail** box being displayed again for the other employees.

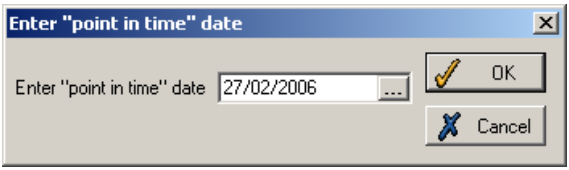
- **No** - click this if you do not want to send the letter to this employee. The letter for the next employee in the range will then be displayed, with the same **Confirm e-mail** box.

- **Abort** - click this if you do not want to email the letter to this employee, or any other employee, as you will return to the **Print letters** table.

9.3 Point in time letters

Some letters may have been set up to display information for a particular point in time (i.e. historical or future information can be used in the letter instead of current data). For example, you may wish to run off letters today which are not due to be sent out until the following week.

If, when you click on **Print**, this form is displayed, you are printing a 'point in time' letter.

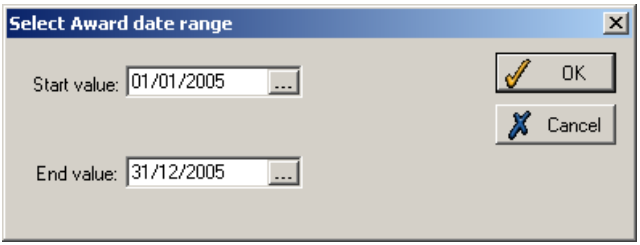


Select the required date and click **OK**.

Now print the letter as normal.

9.4 Letters referring to multi-line records

Some letters may have been set up to display information from multi-line fields (e.g., Qualifications). After you have selected the range of employees, a prompt like this appears:



In this case, employees will be selected based on the date they gained a qualification. You must simply select the **Start value** of the range, and the **End value** of the range. This letter will be sent to all employees who were awarded a qualification in 2005.

When the required range has been selected, click **OK** and then proceed in the normal way.

CHAPTER 10

DIARY

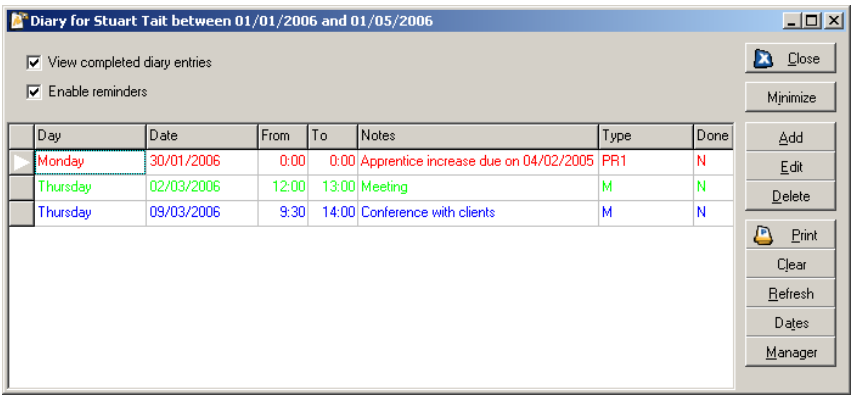
10 Diary

10.1 Maintain diary

The diary function on HR Manager is a reminder system, which can be set up to display messages at relevant times. Your system administrator will have set up diary definitions, which generate diary entries automatically. These will remind managers when an employee is due an appraisal, long service award, pay rise or other appropriate event. Any other messages can be entered manually, and will function in the same way.

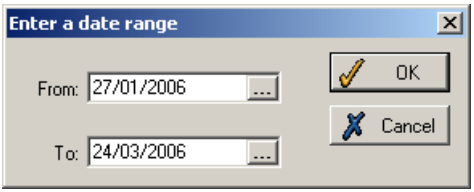
All employees who are in the manager table (see **Job details** for advice on adding an employee to the manager table) have a diary. This is not necessarily exclusive to actual managers, but may include supervisors, department coordinators, and similar. The system administrator will have decided whose diaries you are allowed to access.

To view a diary, select **Maintain diary** from the **Diary** menu. A **Select manager** table will appear, listing all the managers whose diaries you are entitled to access. Select the required manager and a form like this is displayed:



Each row shows a separate diary entry. The entries are colour-coded according to whether the action is dated for a past day, today, or a day in the future.

The diary will only display entries within the period set in the **System preferences**. By default, this includes 60 days in the past and 60 days in the future. To change the dates between which diary entries are shown, click the **Dates** button to show this form:



Select the required start and end dates, and click **OK**. The selected date range is shown on the title bar of the form.

If the 'View completed diary entries' box is ticked, the diary will display completed and uncompleted entries. If it is not ticked, only those that have not yet been completed will be shown.

When 'Enable reminders' is selected, a pop-up box will automatically inform you at the time when a diary entry is due, or if an entry has become overdue.

To view a different manager's diary, click the **Manager** button. You can then select from all the managers whose diaries are accessible to you.

10.1.1 Diary entries

Each diary entry contains the following information:

- **Date** - this is when the entry has been set to inform you of a pending event. For example, if you have asked to be reminded of pending retirements, the diary entry may be a month before the actual retirement date, allowing you to take the necessary action.

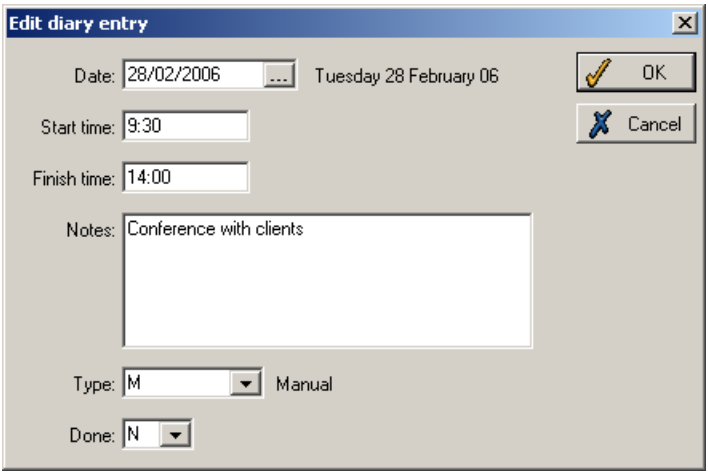
- **Time** - not entered for automatic diary entries, but can be entered manually if required. If no time is entered, you will be reminded whenever you open the diary on the correct date.

- **Notes** - this is the message generated for the automatic diary entry. For manual entries, you can write a message in this box.

- **Type** - the code is shown for the relevant type of diary entry.

- **Done** - whether or not the entry has been completed.

To update or amend an entry, click the **Edit** button. The entry will be displayed like this:



To record that a diary entry has been completed, change the entry in the **Done** box to **Yes**. On clicking **OK**, the entry will be registered as done, meaning that if 'View completed diary entries' is not ticked, the entry will no longer appear on the screen.

If necessary, you can edit any other details of the diary entry on the above form.

To add a manual diary entry, click **Add**, and enter the required details on the same form as shown for editing an entry.

10.1.2 Synchronize with Outlook

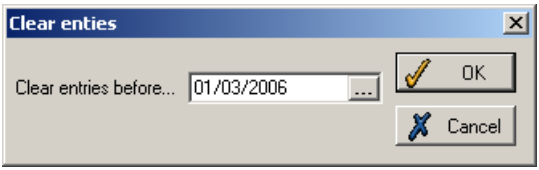
Depending on your settings, the diary may have a **Synchronize with Outlook** button. This feature allows all diary entries to be replicated in the Tasks section of the manager's Microsoft Outlook account. The manager can then deal with tasks in a manner which may be more familiar. However, completing tasks in Outlook does not set them as 'done' in HR Manager, so if Outlook is used as the main reminder system, you may wish to set all tasks as 'done' in HR Manager as soon as they are synchronised with Outlook, to avoid duplicating effort later.

10.1.3 Clear entries

NB: Entries cannot be viewed again once deleted. However, the diary entry is still held in the database until it is old enough to be deleted by Autotask.

To delete a diary entry, select the entry and click the **Delete** button. Then confirm when prompted.

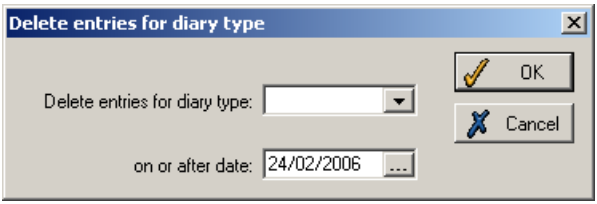
Alternatively, you can delete all entries before a certain date. Click the **Clear** button to display this box:



Select the required date and click **OK**. All entries in this manager's diary, prior to the selected date, will be deleted.

10.2 Delete diary entries

To clear the diary of all entries of a particular type, select **Delete diary entries** from the **Diary** menu. You will see the following form:



This form allows you to delete all diary entries of a certain type after a certain date. Doing this allows the entries to be properly replaced, whereas simply marking the entries as 'Done' will only remove the entries from view, not allowing them to be overwritten.

This function might be used if you are deleting a type (definition) of diary entry that is no longer needed. The deleted diary entries will be regenerated by Autotask if no changes are made to the diary definition.

Use the drop-down list to select the type of entry you wish to delete, and enter the date after which entries of this type should be deleted.

Then click the **Delete** button, and confirm when prompted that you wish to complete the action. All diaries will be cleared of this type of entry from the given date.

CHAPTER 11

REPORTS

11 Reports

11.1 Pre-defined reports

This chapter is a guide to the standard reports that can be produced from within HR Manager. It does not cover the **Custom reporting** feature, which enables users to design their own reports. Custom reporting is explained in the **Report Writer** manual.

Each of the standard reports is created by Mitrefinch. The system administrator may have modified these reports to suit individual company requirements. As this chapter only details the report layouts that are supplied with a standard Mitrefinch package, it is possible that certain sections of this chapter do not correspond exactly with the report layouts you can produce, but the methods for producing reports (i.e., print, display, email or export a report) will be the same.

The standard reports available to you are listed on the **Reports** menu. They normally include the following, although this is not definitive, as your system administrator may have customised your options:

Report	**Definition**
Employee details	emp
Payroll report	payrep
Absence hours	absence
Absence periods	absper
Clockcard	clocking
Flexitime anomalies	flexanom
Holiday entitlement	holent

Depending upon your system set-up, the report list may include some of the following European Working Time Directive reports:

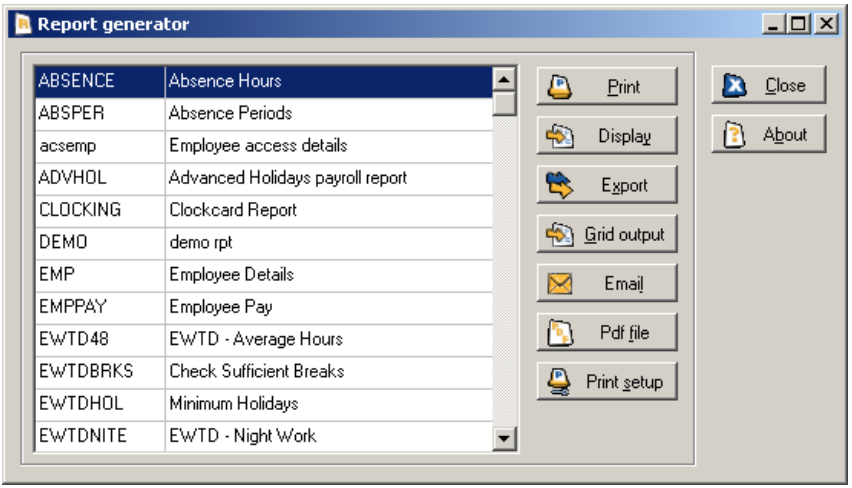
Report	Definition
48 hour average	ewtd48
Night workers	ewtdnite
Break entitlement	ewtdbrks
EWTD holiday entitlement	ewtdhols

11.2 Run a report

The Report Writer can be used to access employee data stored within the system to produce reports. The system administrator will usually be responsible for setting up the actual reports needed by your organisation. For full details, see the Report Writer manual.

The **Run reports** function enables you to access pre-defined reports (those already set up by the system administrator) and display the information on your screen, produce a printed report or create a text file for export into another software package. No modifications can be made to the reports using this option.

Select **Run reports** from the **Reports** menu on the main toolbar, to display a table like this, containing all existing reports on your system:



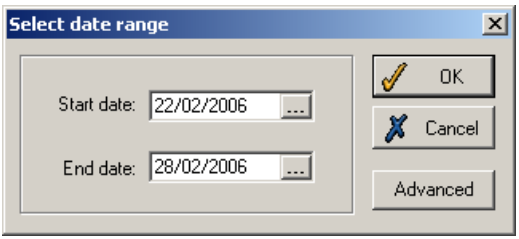
There are various methods of producing the report: Print, Display, Export, Grid output, Email, or save as a PDF.

11.2.1 Select employee range

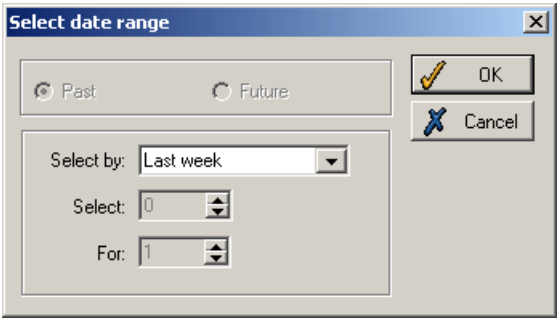
Whichever of the methods of producing the report you choose, the first thing you will see is the screen used to select the range of employees to be included. For details, see **Select range**, page 34.

11.2.2 Select date range

If the report you are producing is specific to a date range (e.g., employees' absence hours in the last month), you will have to select the period to be covered by the report. To do this, use the following screen:



This form enables the user to enter a date range. Either use the calendar buttons to select a start and end date for the report to cover, or select an **Advanced** range to bring up this form:



On this form, HR Manager can work out a specific date range (e.g., two weeks ago or one month in advance) automatically, instead of the user needing to enter the exact dates required. The example shown above would report on data for the last seven days, but there are numerous selection options, using the drop-down list and the other buttons. The drop-down list contains:

Yesterday

Last week/month/year

Today

This week/month/year

Tomorrow

Next week/month/year

Daily

Weekly

Monthly

Yearly

Selecting any except the last four options gives a definite date range (past, present or future), and disables the other options on the form. In this case, click **OK** to return to the previous form.

A **Daily**, **Weekly**, **Monthly** or **Yearly** selection allows a more complex range to be produced.

You should then select either **Past** or **Future** at the top of the form.

Now use the **Select** box to specify when the report should start (e.g., if you have a **Weekly** selection, you can select the number of weeks ago or in advance that should be the beginning of the date range).

The **For** box allows you to enter the duration of the date range (e.g., in a **Weekly** selection, select the number of weeks to be included).

NB: The date range always runs from the first day in the first period to the last day in the last period (e.g., if selected to start one month ago and run for one month, it will start on the first of last month and run until the end of that month).

For example, if you wish to run a report on employee absences from three months ago, click on **Past** and select **Monthly** from the drop-down list, and enter '3' in the **Select** box. Now you have to decide the duration of the period you wish to report on. Enter '3' in the **For** box to report on the last three complete months. Alternatively, if you only want to report on a one-month period, enter '1' in the **For** box. If the current date is 10/06/2005, the absence report would run from 01/03/2005 to 31/03/2005.

Once you have selected the required date range, click **OK** to be returned to the previous page, which will display the date range selected. If these are not correct, click **Advanced** to enter a new definition.

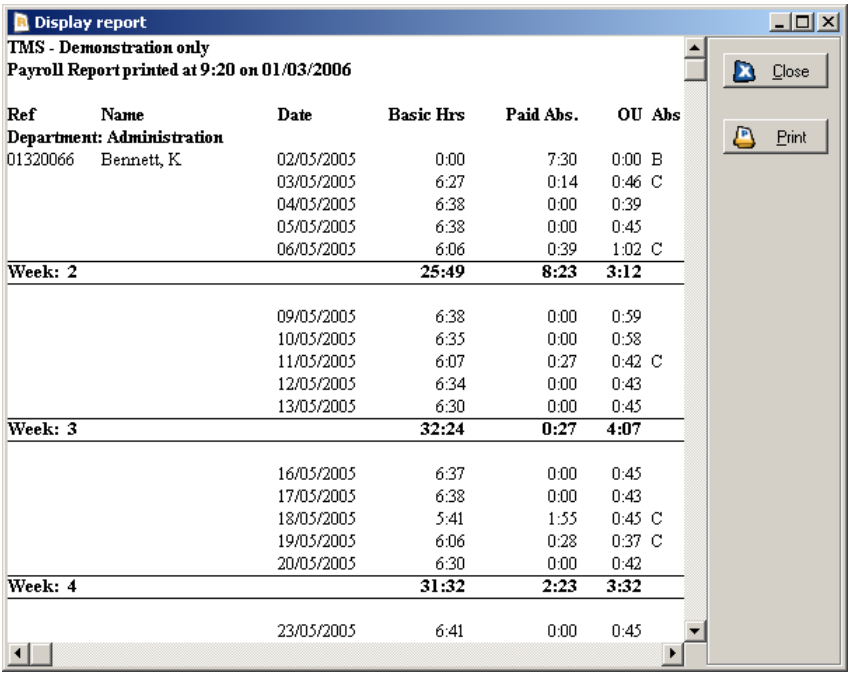
When the start and end dates of the report are correct, click **OK** to produce the report.

11.2.3 Print

Before printing a report, use the **Print setup** button to make sure that the report will be sent to the correct printer, and that the settings are as required.

11.2.4 Display

This option allows the report to be displayed on screen, within HR Manager, without being saved, like this example which shows a section of a payroll report:



Display report

TMS - Demonstration only
Payroll Report printed at 9:20 on 01/03/2006

Ref	Name	Date	Basic Hrs	Paid Abs.	OU	Abs
Department: Administration						
01320066	Bennett, K	02/05/2005	0:00	7:30	0:00	B
		03/05/2005	6:27	0:14	0:46	C
		04/05/2005	6:38	0:00	0:39	
		05/05/2005	6:38	0:00	0:45	
		06/05/2005	6:06	0:39	1:02	C
Week: 2			**25:49**	**8:23**	**3:12**	
		09/05/2005	6:38	0:00	0:59	
		10/05/2005	6:35	0:00	0:58	
		11/05/2005	6:07	0:27	0:42	C
		12/05/2005	6:34	0:00	0:43	
		13/05/2005	6:30	0:00	0:45	
Week: 3			**32:24**	**0:27**	**4:07**	
		16/05/2005	6:37	0:00	0:45	
		17/05/2005	6:38	0:00	0:43	
		18/05/2005	5:41	1:55	0:45	C
		19/05/2005	6:06	0:28	0:37	C
		20/05/2005	6:30	0:00	0:42	
Week: 4			**31:32**	**2:23**	**3:32**	
		23/05/2005	6:41	0:00	0:45	

Close

Print

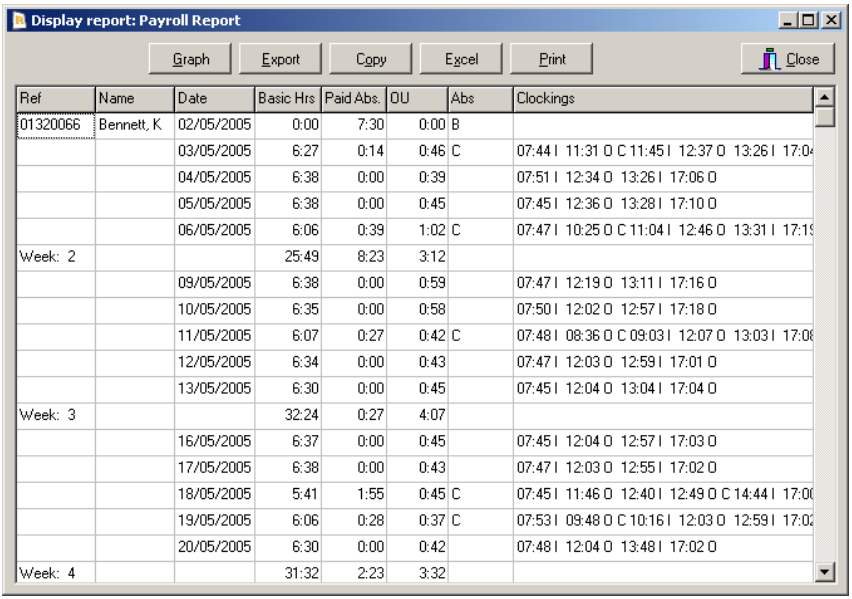
This report can now be printed, if required, by clicking the **Print** button.

11.2.5 Export

This option allows you to export the report to a specified location. The system administrator will have specified the filename and the destination of the exported file when the report was initially set up. You then need to open the file from that location.

11.2.6 Grid output

This functions in a similar way to the **Display** function, but the report is in a spreadsheet format, like this:

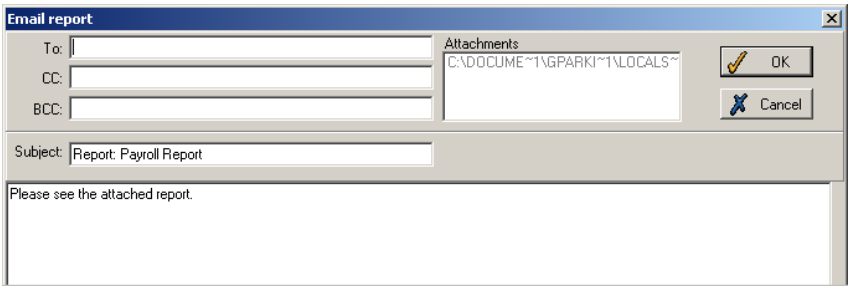


Ref	Name	Date	Basic Hrs	Paid Abs.	OU	Abs	Clockings
01320066	Bennett, K	02/05/2005	0:00	7:30	0:00	B	
		03/05/2005	6:27	0:14	0:46	C	07:44 I 11:31 O C 11:45 I 12:37 O 13:26 I 17:0
		04/05/2005	6:38	0:00	0:39		07:51 I 12:34 O 13:26 I 17:06 O
		05/05/2005	6:38	0:00	0:45		07:45 I 12:36 O 13:28 I 17:10 O
		06/05/2005	6:06	0:39	1:02	C	07:47 I 10:25 O C 11:04 I 12:46 O 13:31 I 17:1
Week: 2			25:49	8:23	3:12		
		09/05/2005	6:38	0:00	0:59		07:47 I 12:19 O 13:11 I 17:16 O
		10/05/2005	6:35	0:00	0:58		07:50 I 12:02 O 12:57 I 17:18 O
		11/05/2005	6:07	0:27	0:42	C	07:48 I 08:36 O C 09:03 I 12:07 O 13:03 I 17:0
		12/05/2005	6:34	0:00	0:43		07:47 I 12:03 O 12:59 I 17:01 O
		13/05/2005	6:30	0:00	0:45		07:45 I 12:04 O 13:04 I 17:04 O
Week: 3			32:24	0:27	4:07		
		16/05/2005	6:37	0:00	0:45		07:45 I 12:04 O 12:57 I 17:03 O
		17/05/2005	6:38	0:00	0:43		07:47 I 12:03 O 12:55 I 17:02 O
		18/05/2005	5:41	1:55	0:45	C	07:45 I 11:46 O 12:40 I 12:49 O C 14:44 I 17:0
		19/05/2005	6:06	0:28	0:37	C	07:53 I 09:48 O C 10:16 I 12:03 O 12:59 I 17:0
		20/05/2005	6:30	0:00	0:42		07:48 I 12:04 O 13:48 I 17:02 O
Week: 4			31:32	2:23	3:32		

This output has additional options, allowing you to create a **Graph** of the report, or to save the report as a spreadsheet to Microsoft **Excel**.

11.2.7 Email

The email reports option allows you to send the report as an attachment in an email. The following screen will be displayed, for you to enter the email address of the recipients. You can also alter the message displayed with the email.

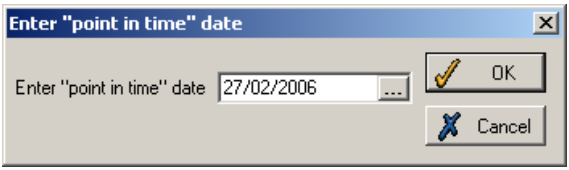


11.2.8 PDF

Producing the report as a PDF has the benefit of allowing you to save it to disk. When you have chosen the location for the report to be saved, it will be displayed immediately.

11.2.9 Point in time reports

If the report has been set up to display information as of a particular point in time (i.e. historical or future information can be used in the report instead of current data), this box will be displayed after you have selected the range:



The default date in the box will always be today's date. Select the date that you require and then click **OK**.

Now produce the report as normal.

CHAPTER 12

MAINTAIN PREFERENCES

12 Maintain Preferences

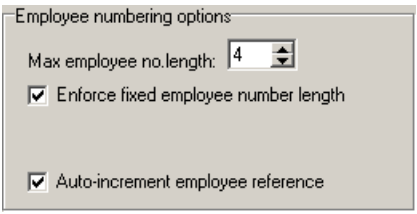
This chapter is aimed to help system administrators customise the way their systems are displayed and the way they function. It is advised that this, along with all other options on the **System** menu, is made available to the system administrator only.

Note that there are two levels of preferences that can be set in the application - system preferences and local preferences. Within the system preferences, the system administrator can choose to **Allow local override** (on the **Toolbar** panel, page 136). If this is ticked, each user can override the system preferences regarding the interface and toolbar (but not other preferences). If this option is not ticked, then all users will have the same preferences as those defined by the system administrator.

The **Maintain system preferences** form, opened by selecting **Maintain preferences** from the **System** menu of HR Manager, contains a number of panels. The content of these panels will differ according to whether your HR Manager is linked to any other Mitrefinch applications - in particular, if you are also running TMS, you will notice a number of additional features to those explained below.

12.1 General panel

Employee numbering options



- **Max employee no. length** - choose the maximum length for an employee reference number.

- **Enforce fixed employee number length** - it is recommended that you select this option, as it minimises the risk of error, particularly when passing data to other systems such as the payroll. The fixed length is the maximum entered in the above box.

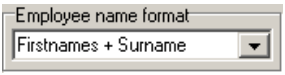
- **Auto-increment employee reference** - when ticked, this means that, when adding new employees, the user will automatically be offered the next free number after the number given to the last employee added. That is, if the last employee entered was given reference number 3004, then when the next employee is added, 3005 will be offered (provided it is not already taken). Note that the user has the option of overriding the automatic number and selecting another. However, this will have a knock-on effect on the automatic number offered for the next employee. For example, if the number offered is 2034, and the user chooses to use 5000 instead, the next number offered will be 5001.

Tips:

- If your organisation uses alphanumeric reference numbers, automatic numbering is not available.

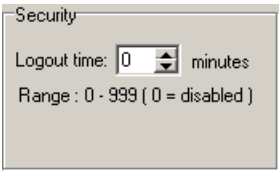
- If you specify a maximum number length, please think carefully about it. If your employee references are numeric only and you have fewer than 1000 employees, a 4-digit number will allow you up to 9999. There is little point in opting for a greater number of digits with all the unnecessary leading zeros. Even if you have a few thousand employees you may still prefer to fix the length at 4 digits, unless links with other systems require a greater number.

Employee name format



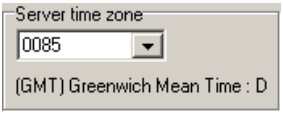
The options in the drop-down list for this section allow you to change what is displayed on the various panels in the system. This does not affect the format of the main **Employee** drop-down list, which depends on the selection options.

Security



Here you can select the time after which, if the system has been idle, users will automatically be logged out. If '0' is selected, this feature is not used.

Server time zone



In this box you should select the time zone in which the server PC operates. It is essential that you set this information correctly, even if you are not running TMS.

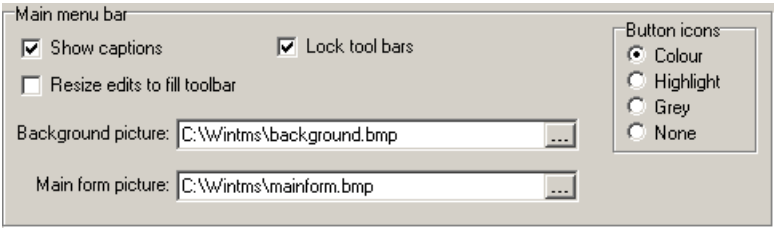
Employee view

The **Code for employee view** box has a drop-down list containing fields. One of these fields (in this example, **Location**) can be selected as the field whose value determines the employee's view. This influences access to various features of the system.

12.2 Interface panel

This panel allows you to select the design of the interface (all options on this panel can also be customised by the individual user within **Local preferences**, provided that **Allow local override** is ticked on the **Toolbar** panel (see page 136)).

Main menu bar



The **Main menu bar** section allows you to change the display of the whole main form. You can choose to:

- **Show captions** - this refers to captions underneath the icons on the toolbar. If you are short of space on the toolbars this makes the icons much smaller, giving more room.

- **Lock tool bars** - when ticked, all toolbars are fixed in their current position. When unticked, you can move toolbars around on the main form.

- **Resize edits to fill toolbar** - when ticked, all edit boxes (e.g., the drop-down lists) on the toolbars can, when dragged to a new location, be resized so as to ensure that the toolbar is filled to the edges of the screen.

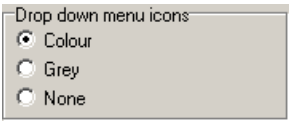
The **Background picture** is the image shown in the background of the toolbars section. This can be changed by clicking the button in the box and browsing to the location of the desired image file.

The **Main form picture** is the image shown in the background of the rest of the HR Manager main form, usually the section below the toolbars. This can be changed in the same way.

Button icons - the four options refer to the way you wish the icons to be displayed on the toolbar. The **Colour** image is the **'Hot' image** chosen for the button on the **Button properties** section of the **Modify forms** screen (see page 280). The **Grey** image will be the normal **Image** chosen in that same section.

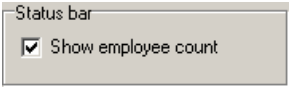
Note that you cannot set **Button icons** to **None** unless you have **Show captions** ticked - otherwise there would be nothing to show on the toolbar.

Drop-down menu icons



This section refers to the various menus in the application. Each option on a drop-down menu can show the icons (**Colour** or **Grey** as explained on page 135 for **Button icons**), or, by choosing **None** you can prevent icons from being displayed in the menus.

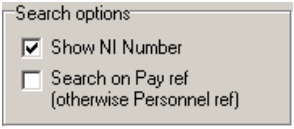
Status bar



Ticking the **Show employee count** box means that the total number of employees will be shown in the status bar at the bottom of your screen. This also depends on **Selection options** (e.g., if leavers are excluded in **Selection options** they will also be excluded from this count).

Search options

These boxes refer to the **Find employee** function.



Show NI Number - when ticked, you can search for employees using the NI number. When left blank, employees' NI numbers are not displayed anywhere in this feature.

Search on Pay ref - tick this to search on the **Pay reference** number rather than the **Personnel reference** number.

12.3 Toolbar panel

Allow local override

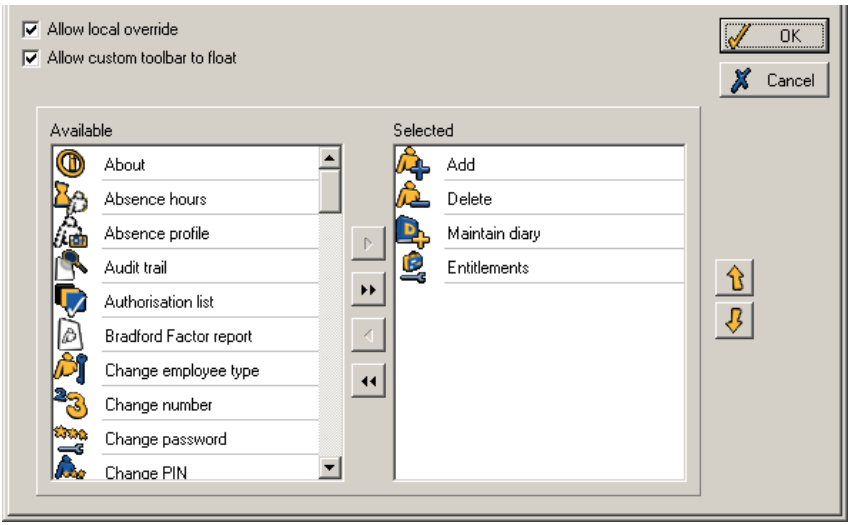
If you tick this box, you are enabling users (including yourself) to override the settings defined on the **Interface** and **Toolbar** panels of the **Maintain system preferences** form. Users cannot override preferences chosen on any other panel of **System preferences**.

When local override is allowed, it can be performed by selecting **Local preferences** from the **Other** menu on the main form. The user can then choose whether or not to tick the **Use global defaults** box. By ticking it, the user's application will take all the system preferences. By unticking it, the user is able to modify the local preferences, as they are applied on his or her own application. All options on this **Local preferences** form work in the same way as those on the **System preferences** form.

Allow custom toolbar to float - this, when ticked, allows the custom toolbar to 'float', i.e., move freely around the main form without being attached to the main toolbar. To enable this to work most effectively, the **Lock tool bars** box on the **Interface** panel should not be ticked.

Custom toolbar

The custom, or user-defined toolbar can be displayed on the main form in addition to (or instead of) the **Employee** and **Group** toolbars. It can be useful to add icons to this toolbar for the functions you find yourself accessing most frequently, as it may save time searching for the functions on the different menus.

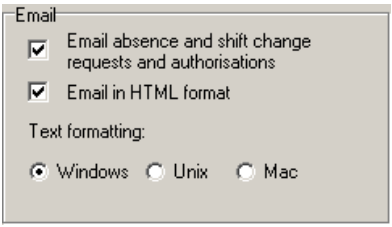


Use the arrows to select which icons will be displayed on your user-defined toolbar, and in which order (for details, see **Select available items**, page 39).

12.4 Web panel

If your organisation uses the web module, HR.NET, alongside HR Manager, this panel enables you to define a number of settings of the web application. Some of the sections on this panel only affect elements of the T&A.NET program. Below, the settings affecting HR.NET are explained.

Email

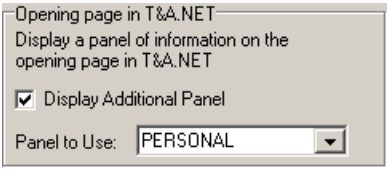


The first box, when ticked, specifies that employee requests are sent by email to the supervisor, and that supervisor responses are sent back by email to the employee in question.

The second box allows you to select whether or not these emails are sent in HTML format.

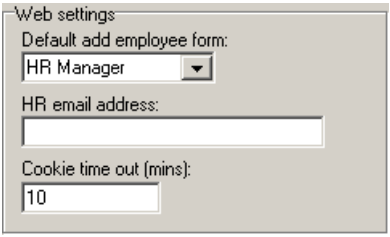
The **Text formatting** you choose for these emails will depend what type of system you are running.

Opening page in T&A.NET



If your licence is only for HR.NET, this section is still relevant. You can select to **Display additional panel** if required. You will then need to select the required panel from the **Panel to use** list. The chosen additional panel will be shown upon opening the web module.

Web settings

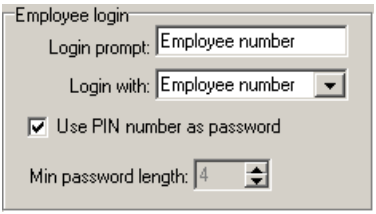


The **Default add employee form** is the form which will be shown when a new employee is added. If your licence also includes other Mitrefinch applications, you will able to choose between these for the default (which can still be changed by the user).

The **HR email address** is the address to which any emails concerning requests etc. will be sent (see **Email**, page 138).

The **Cookie time out** is the number of minutes for which the system must be idle before the user is automatically logged out.

Employee login

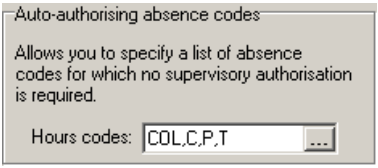


This allows you to set the way employees can log in to the system.

The option from the **Login with** drop-down list is what identification is used to log in to the system. The entry for the **Login prompt** is the wording of this prompt (your employees may use different terms from the Mitrefinch standards).

Employees also need a password. Tick the box if you wish to allow them to **Use PIN number as password**. Otherwise, you will have to set a **Minimum password length** for the employees' passwords.

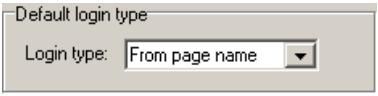
Auto-authorising absence codes



You can allow certain employee absences to be 'auto-authorising', which will not require supervisory authorisation.

You can select any **Hours codes** from the box.

Default login type



You can select a default **Login type** for users of the web page. This is the type of login page (employee or supervisor) that is shown when the web module is first opened. In this example, **From page name** has been selected, meaning that the page displayed depends on the settings when loaded.

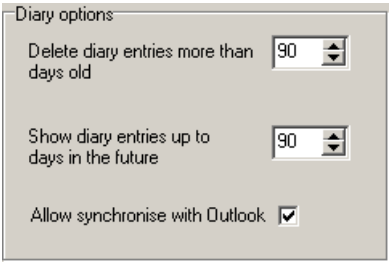
12.5 Email panel

If, on the **Web** panel, you ticked the box to allow requests and authorisations to be emailed, you should ensure that the correct email settings are chosen on this panel.

Using the drop-down list, you can choose the **Email component** to be used on all request and authorisation emails on the system. If you choose SMTP from the list, the SMTP settings section, lower down the panel, will become active. Ensure that you select the settings most appropriate to your system.

12.6 Diary panel

On this panel, you can select preferences that affect managers' diaries.



The two boxes allow you to define the number of days in the past and the future for which diary entries will be shown on managers' diaries.

Allow synchronize with Outlook - if this box is ticked, emails will be sent automatically to managers informing them when there are any new diary entries. The diary entries are then entered into the Tasks section of Microsoft Outlook.

CHAPTER 13

MAINTAIN DROP-DOWN LISTS

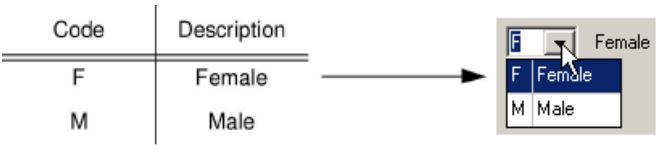
13 Maintain Drop-down Lists

The functions described in this chapter should only be available to those with a thorough knowledge of the system and of the organisation.

13.1 About drop-down lists

The data that is entered in many fields on the system can be 'defined' by the use of drop-down lists. For example, if you have the field **Sex**, a drop-down list can limit the entries to either 'M' (male) or 'F' (female); no other data can be entered.

The System Administrator is responsible for maintaining the accuracy and relevance of the drop-down lists. All drop-down lists (with the exception of **Title**, which is simply 'Mr', 'Mrs' etc.) hold both a code and a description. For example:



The **Sex** drop-down list contains the above codes and descriptions.

When the system is installed there will be detail already provided in the drop-down lists. Some of this will be useful to you and you may not wish to change it. For example, you might choose to leave in place lists like Title, Next of kin, Ethnic Origin, Qualification Types and Award Bodies.

Other lists will need 'editing', replacing codes and descriptions with those of your own choice. Before you do modify any drop-down lists you may wish to print a hard copy, which can be used to provide examples when you are considering your own structure.

13.2 Reasons for using codes

In some cases codes will already exist within your company. Typically, these will be recognised department numbers, or abbreviations used for divisions or locations. In other cases, such as job titles or job categories, it is helpful to devise a coding structure that will help to sort and analyse the data if required.

For example, a list of 100 qualifications, uncoded, is difficult to analyse. At best it can be sorted alphabetically, but that does not help when asked a question like, 'how many people have an engineering-related qualification?'

In an unstructured list, the only way to answer the question is to pick out every likely-sounding qualification and report on it.

Structuring the codes so that the first character of the code represents a broad subject area (e.g., Languages, Engineering, Health & Safety) considerably improves the ability to analyse the data. In this way, finding all employees with an engineering qualification can be done by asking for all employees with a code beginning with, for example, E:

Code	Description
ES001	National Certificate in Engineering
ES002	Industrial Chemisty
ES003	Electronic Engineering
ES004	City and Guilds 221 in Electronic Engi
ES005	Advanced Electrical Engineering
ES006	Mechanical Engineering
ES007	Industrial Manufacturing Engineering
ES008	Applied Physics

This example shows the codes that might be set up for engineering-related qualifications.If you run a report asking for employees with a code starting with 'E', all employees with any of these types of qualifications will be reported on.

Likewise, job titles can be grouped by using a first character of the code. So when asked 'how many finance staff do we have?', a quick answer can be given by asking the system to select all employees with codes starting with, for example, F.

You might think that in your organisation this could be achieved by simply counting the people in the Finance department. However, consider what happens if:

- The top Finance person is an executive and not within the Finance department head-count.

- The Finance department contains non-finance staff, such as secretaries.

- The Finance staff are split into departments across the organisation, or departments are multi-functional teams.

By setting a sensible coding structure at this point you should always be able to analyse the organisation, no matter how many times it is restructured.

Tips:

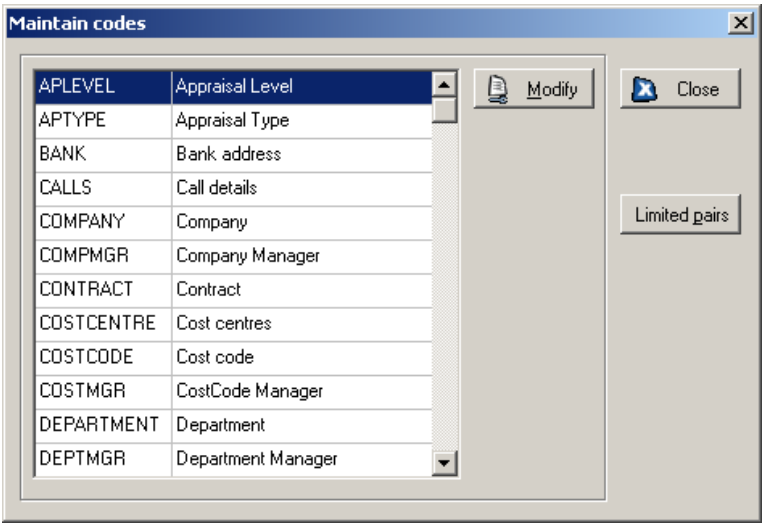
- Avoid establishing codes that are dependent upon another factor. For example, if you establish codes for job titles, based on their current grades, you may end up with a neatly sorted list now but if the grades change you will be forced to restructure your codes. It is better to **LINK** job titles to relevant grades. (See **Complex codes**, page 153.)

- Avoid setting up overcomplicated coding structures that will become difficult to maintain. If you cannot explain your coding structure in a couple of sentences, it is probably too complicated.

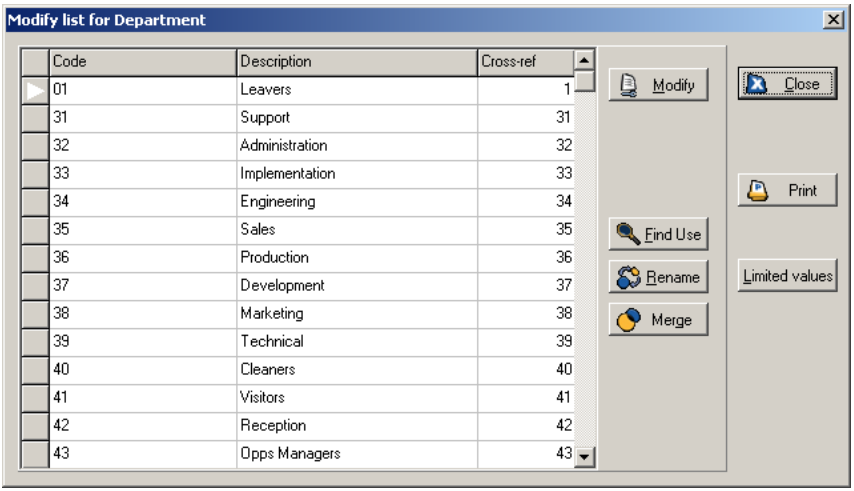
- All the codes are alphanumeric and so the system does not recognise them as numbers, even if you have only used digits. Thus codes 1, 2, 10, 20, 100 and 200 would actually be sorted as 1, 10, 100, 2, 20, and 200. If you want them to be sorted numerically you will need to insert leading zeros giving 001, 002, 010, 020, 100 and 200.

13.3 Set up drop-down lists

Open the **System** menu and select **Maintain codes**. The following table appears:



Select the list that you wish to look at or edit and click the **Modify** button, to produce this form (this is the **Department** list):



Add a code

To add a code, click **Modify** and then add the new code and description to the bottom of the list (simply type in the details). Click **Apply** to save the changes. The new codes will be automatically sorted by the code number.

Delete a code

To delete a code, click **Modify**, and then click in the left-hand margin of the code you wish to delete and select **Delete entry**. Click **OK** and the entry will be deleted.

NB: The system will not allow you to delete a code which is in use in an employee record, either currently or historically. If you try to delete a code which is in use an error message will be displayed. To check which employees are using the code, click the **Find use** button (see **Find code use**, page 152).

13.4 Change codes or descriptions

TAKE CARE

There are three ways of altering codes and descriptions; careful consideration needs to be given to the most appropriate method to use.

13.4.1 Change the description

Click **Modify** and you can then type over the description. Note that this will change the description throughout the system, for anyone using that code, either currently or historically. If you wish to find out who is using that code before you decide whether or not to change the description, click **Find use**.

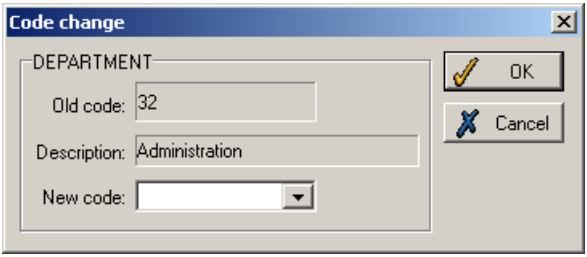
For example, you may wish to change a job title of IT Administration Assistant to IT Administration Coordinator. You would select the required description on this form and type the new description over it. This means that all instances of IT Administration Assistant throughout the system will change to IT Administration Coordinator.

See **When to change codes or descriptions**, page 150, for examples of when it is appropriate to change the description in this way.

13.4.2 Rename the code

You cannot simply overwrite a code; you need to use the **Rename** function. This is extremely useful if you are restructuring your codes and want all of the existing links and references to the code to remain. Renaming a code affects all employee records - current, future and historical.

To use this function, simply select the code you wish to change and click the **Rename** button. This form appears:



Enter a **New code**. This must be unique (i.e., not already used in the list). Click **OK**, and the code will change immediately throughout the system.

See **When to change codes or descriptions**, page 150, for examples of when it is appropriate to use this function.

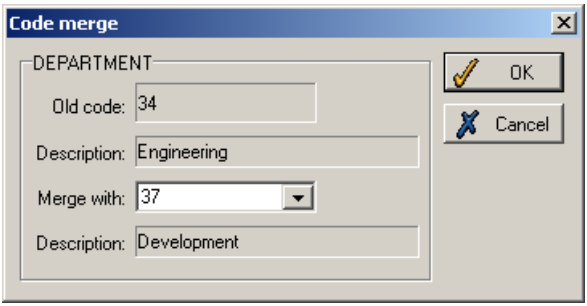
13.4.3 Merge codes

Sometimes, more than one code is inadvertently set up to represent the same thing, or departments are merged. In these circumstances one code becomes redundant. The **Merge code** function can be used to deal with this.

NB: Think carefully before you merge codes because the merge cannot be reversed.

To merge codes together, select the code that you wish to merge with another (e.g., you want to merge department 34 with 37, so select department 34).

Click on **Merge code**. A form like the following will be displayed:



Select the code the first code will **Merge with**. This is the code that both codes will now be known as. Click **OK**. The two codes will now be merged, with all instances of the first code (in this example, 34) now being switched to the new code (here, 37).

13.5 When to change codes or descriptions

Example 1

An organisation has a group of employees called Process Operators. Following a re-evaluation of their role, it is decided that it would be more accurate to call them Process Technicians.

There are two possible ways of making the change and each will have a different impact on the system.

a. Simply change the description in the drop down list (by typing over the original description).

This will change ALL records for Process Operator to Process Technician, **EVEN IN HISTORICAL INFORMATION**. It will not record a date for the change, and any reference to the fact that an employee was once a Process Operator will be lost.

b. Add a new code for Process Technician and **Update** the records for employees currently called Process Operators.

This will allow you to retain the historical information, which tells you that employees were once called Process Operators, and it will also give you the date of change.

Example 2

Following on from the example above, if you chose Method B, the Process Operator code will need to be retained for historical purposes, but you may wish to prevent it being accessible from the drop-down lists.

The system will not allow you to delete a code that is in current or historical use. However, you are able to ensure that a particular code is not accessible to the user. See **Complex codes** on page 153.

Example 3

Your IT department has requested that all department codes are changed to fit in with a new accounting system. The department names will stay the same and employees will remain within the same departments.

This is an obvious use for **Rename** a code, but think through the implications for any reports.

Example 4

Two departments are merging and will keep the description (name) and code of one of the departments.

a. Using **Merge code** will ensure that all records of one department become incorporated into the other. This will not keep a record of the date that this took place, or the fact that employees were previously in the other department.

b. If a record of the change is required, set up a new code encompassing both departments and **Update** the employee records.

Example 5

You realise that you have two Job title codes for what is really the same job.

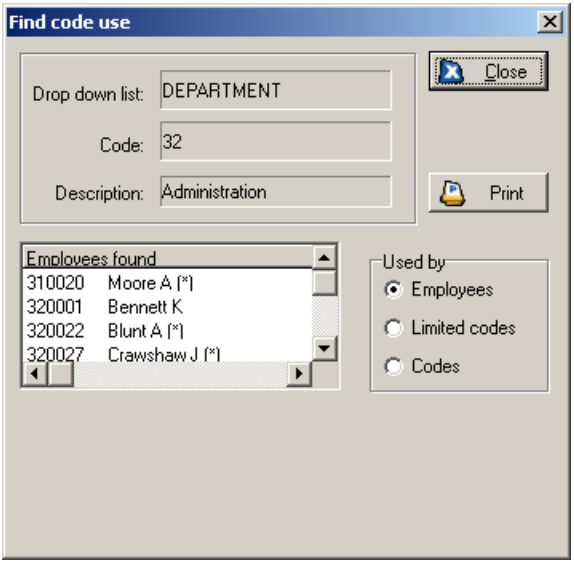
This is an obvious use for **Merge code**.

13.6 Find code use

Employees

It is sometimes useful to know which, if any, employees are currently using a code, particularly if you are about to modify either the code or description.

Select the appropriate code from the list and click on **Find Use**. A form like this will be displayed:

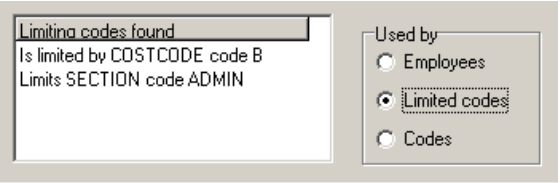


Ensure that **Employees** is selected so the box will show a list of employees using the code. If an employee in this list has a * next to his or her name, it means that the code is not currently in use, but exists in the employee's history.

In this example, a number of employees use, or have used, this code, meaning that if you modify the code or description it will immediately affect these employees.

Limited codes

Some code lists can be made to restrict the use of other code lists. It is therefore useful to know how a particular code is currently restricted. Select **Limited codes** on the above form, and the box will display information like this:



The box shows which other codes the selected code is limited by, and which ones the selected code actually limits.

13.7 Complex codes

Your system will work perfectly well if you do not use this facility but setting complex codes up properly should save you time and increase the accuracy of data stored on the system.

A complex code is a code that can be linked to another complex code so that the value of one code determines what are valid values of the other code.

Consider the following examples of how you might want to limit codes:

- You may decide that if a particular job title is selected on the employee's **Job details** form, then only a limited number of job grades should be available from the drop-down list of job grades on that form.

- You may want to ensure that when a department is selected, the appropriate manager is given.

Advantages of limiting codes

- You can ensure that when a drop down list is opened on an employee record, only relevant information is shown, making it easier for the user to select the item they require. For example, if a Vocational Qualification Type has been chosen from the drop-down list on the employee's **Training and Qualifications** form, only levels relevant to Vocational Qualifications will be available from the qualification **Level** drop-down list.

- You can minimise the risk of error by reducing the options available in a drop-down list. For example, if a job title can only fall within a range of job grades, only that range is shown.

- You can force a default. For example, when a department is selected from the drop-down list on the **Organisation details** form, it MUST be in a particular division.

Disadvantages of limiting codes

- They have to be maintained. If a new code is added and you neglect to specify how it is to be used, the information may not be available for use on the employee records. When codes are not limited, all the information from the drop-down lists will always be fully accessible.

13.7.1 Deciding how to set up your complex codes

First, decide which code lists are to be linked and which will limit another. Consider the following example:

You have three main sections, each with four departments. Each department has two or three cost codes. This is clearly a good case for making one code limit the availability of another code.

Section 1		**Section 2**		**Section 3**	
Dept	**Cost Codes**	**Dept**	**Cost Codes**	**Dept**	**Cost Codes**
Dept A	11,12,13	**Dept E**	22,23	**Dept I**	32,33
Dept B	14,15	**Dept F**	24, 25, 26	**Dept J**	34, 35

Dept C	16, 17, 18	**Dept G**	27, 28, 29	**Dept K**	36, 37
Dept D	19, 20, 21	**Dept H**	30, 31	**Dept L**	38, 39

Decide which order the user has to enter the fields in. It may be:

Method 1:

Section, which will limit **Department**, and then **Department** which will limit **Cost Code**.

For example, when the user chooses Section 1, the only departments available for selection in the next list will be A, B, C and D. If the user then selects B, the only cost codes available for selection in the next list are 14 and 15.

While this is undoubtedly a help to the user (because the available options are limited), there is still the risk that the user may select an incorrect department or cost code.

Method 2:

An alternative way would be by first requiring the user to select the cost code, which will automatically present the correct department. This will in turn present the correct section. In this case:

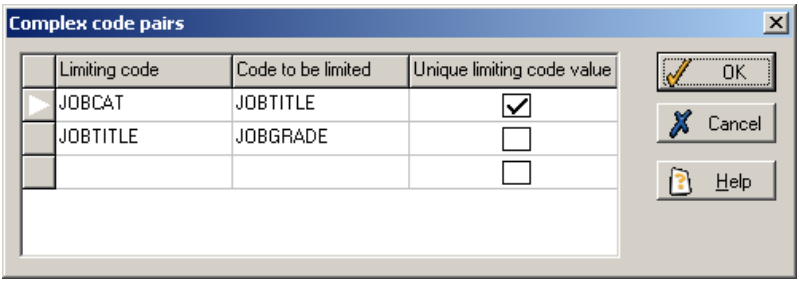
Cost Code, which will limit **Department**, and then **Department**, which will limit **Section**.

For example, when the user chooses cost code 14, the department will default to B and the section will default to 1. This method means that the user has to enter only one code and the rest of the information defaults to the correct option (reducing administration and increasing accuracy).

13.7.2 Procedure for setting up complex codes

Once you have decided which code lists are to be linked and which will limit the other, you can then set up the complex code.

Open the **System** menu, and select **Maintain codes**. Click the **Limited pairs** button to open this form:



This shows all limited pairs that already exist on your system. The **Unique limiting code value** column should be ticked if you want each value of the **code to be limited** to have only one possible value in the **limiting code**. So, in this example, each job title is only available to one job category. But each job grade can be available to more than one job title, as this limiting code value is not unique.

Enter the details of the new pairs of linked code lists you need to set up. In this example, these pairs will be added:

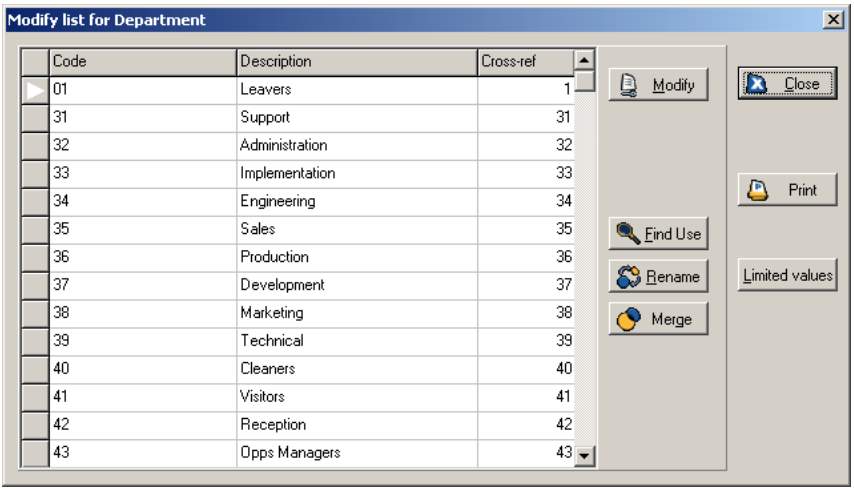
Limiting Code	**Code to be limited**
COSTCODE	DEPARTMENT
DEPARTMENT	SECTION

NOTE: If you cannot find the code you want in the list of available complex codes, this means it has not been made available as a complex code. For instructions on how to make it available, see the **Lookups** section of Chapter 22, **Customisation**, page 266.

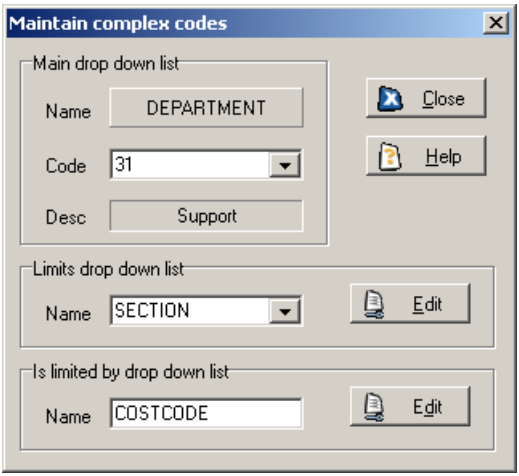
Once you have entered any pairs you wish to set up, click **OK**.

13.7.3 Set up complex codes starting with the limiting code

Now select the name of one of the limiting codes on the general **Maintain codes** list (in this example, DEPARTMENT, which will limit SECTION) and click **Modify**. You will see a list of values (in this instance, department numbers and descriptions) that are available for that particular list:



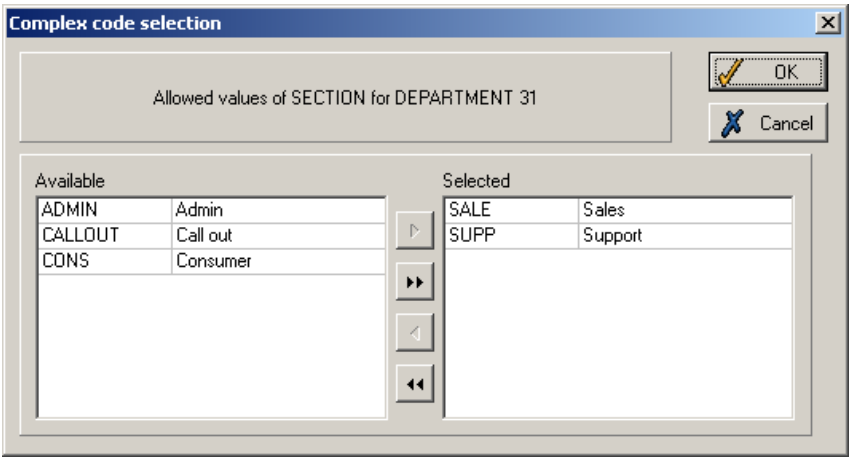
The relationship between the values in this code list and those in other lists must be set up individually - so select one of the departments, by clicking on the required row, and then click the **Limited values** button to display a form like this:



In this example, DEPARTMENT limits SECTION and is itself limited by COSTCODE.

(Note that if DEPARTMENT limits more than one other code list, you may have to click on the arrow next to the **Limits drop down list**, in order to select the code list you wish to edit.)

Click the **Edit** button next to SECTION to define the relationship between Department 31 and the SECTION list. This form appears:



Select the sections that are allowed when Department 31 is selected, using the arrows to move the required sections into the **Selected** box.

Click **OK**.

This must now be repeated for each department, so that whenever a department is chosen, only the correct sections can be chosen.

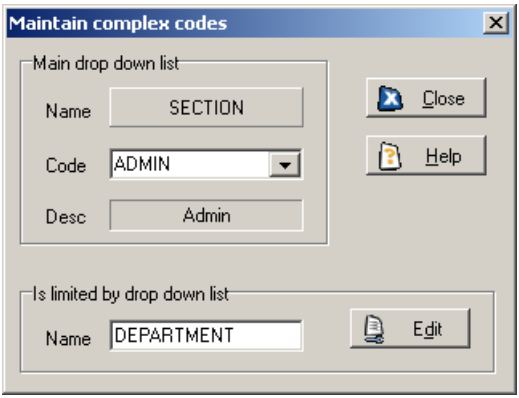
There is an alternative method, which may be faster.

13.7.4 Set up complex codes starting with the limited code

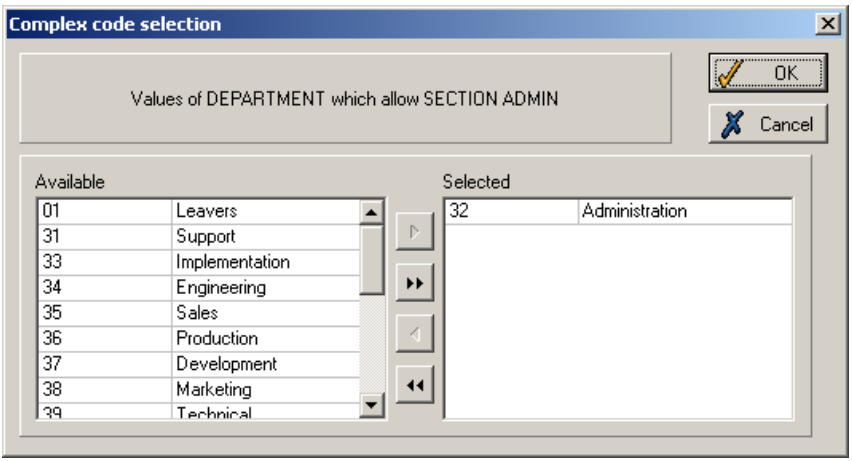
In the example given above of DEPARTMENT limiting SECTION, it is likely that there are considerably more departments than there are sections.

To work through every department as described above would be time consuming. It is far quicker to start from section, the limited code.

To do this, close the **Modify list for Department** form, to return to the main **Maintain codes** table. Select **Section**, and click **Modify**, to open the **Modify list for Section** form. This lists all section values with their descriptions. Select a section from the table, and click **Limited values**:



In our example, SECTION is limited by DEPARTMENT. You can now define the relationship between the chosen section (in this case, ADMIN) and the department list. To do this, click the **Edit** button:



Now move all departments that you wish to allow the ADMIN section to the **Selected** box.

If **Unique limiting code value** was ticked on the **Complex code pairs** form for Department limits Section, it will only be possible to move one value of Department into the **Selected** box.

Click **OK**, and then repeat the action for all section codes.

Note that setting up complex codes this way has the same results as starting from the limiting code, but can be quicker to perform.

13.7.5 Add a new code

You may want to add new codes from time to time, if, for example, a new department or job title is being created. If this code is to be a complex code, you will have to specify its use in order to make it available correctly to users. When the code is created, you should follow the same steps as outlined above, depending on whether it is a code that limits other codes, or is itself limited by codes (or both).

13.7.6 Alternatives to complex codes

Not all of your requirements for restricting or specifying the input values of fields will be met by the use of complex codes. There are other options:

1. Fields can have a default value which may then be overridden by the user. See **Advanced field properties**, page 255.

2. Special calculations may be used to determine the entry in a field. For example, an employee's entitlement to notice is dependent on the type of contract and the length of service. Special calculations ensure that the data in the **Notice** field changes with the length of service (see **Field calculations**, page 258).

CHAPTER 14

MATRIX REPORTS

14 Matrix Reports

Matrix reports enable you to summarise information by specified groups. For example, you may want to report on average salaries by job grade and by department, or on the number of males and females in each department.

Matrix reports use similar functions to column reports. The difference is that a matrix report looks more like a spreadsheet (grid) and allows you to summarise information in rows and columns, whereas a column report simply has columns of information.

Like a column report, a matrix report searches for selected information on the system and displays the results in a specified format. It uses fields and expressions to define what will be displayed, and can use calculations.

For example, if you are producing a report on average salaries by job grade and department, you might choose to have the job grades in columns and the departments in rows. You would then want to report on the average salary within each cell of the grid:

	Grade 1	**Grade 2**	**Grade 3**	**Grade 4**	**Grade 5**
Dept 1	ave. salary	ave. salary	ave. salary	ave. salary	ave. salary
Dept 2	ave. salary	ave. salary	ave. salary	ave. salary	ave. salary
Dept 3	ave. salary	ave. salary	ave. salary	ave. salary	ave. salary
Dept 4	ave. salary	ave. salary	ave. salary	ave. salary	ave. salary

Another example might be to find the number of males and females by division. In this case, the rows will represent the divisions and the columns will be the sex - male or female. Within each cell of the grid you will count the number of employees:

	Male	**Female**
Div 1	count	count
Div 2	count	count

Div 3	count	count
Div 4	count	count

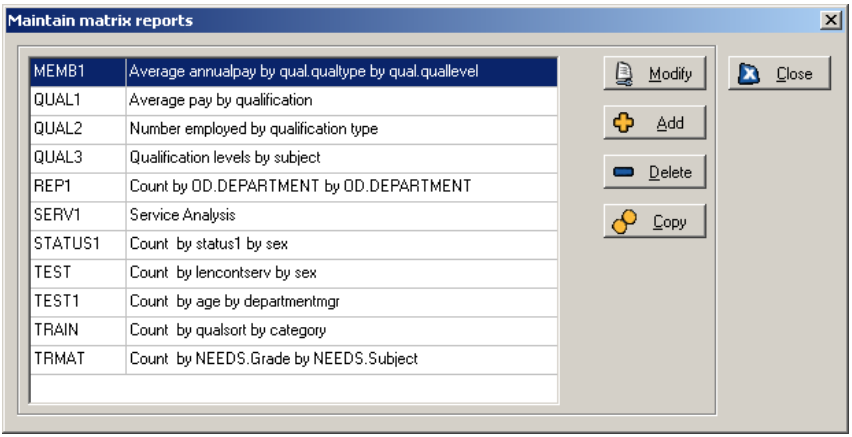
Within each cell, you can use one of the following functions:

Count	counts the number of entries
Total	gives totals of a numeric field, e.g., total salaries
Average	gives averages of numeric fields, e.g., average salary, average age
Median	gives median value (i.e. middle value) of numeric fields, e.g., median salary, median age
Maximum	gives highest value of numeric fields
Minimum	gives the lowest value of numeric fields

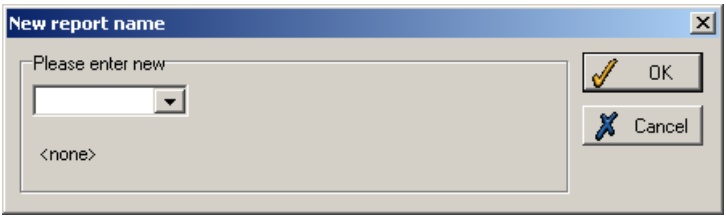
14.1 Create a matrix report

Select **Matrix reports** from the **Reports** menu on the main toolbar.

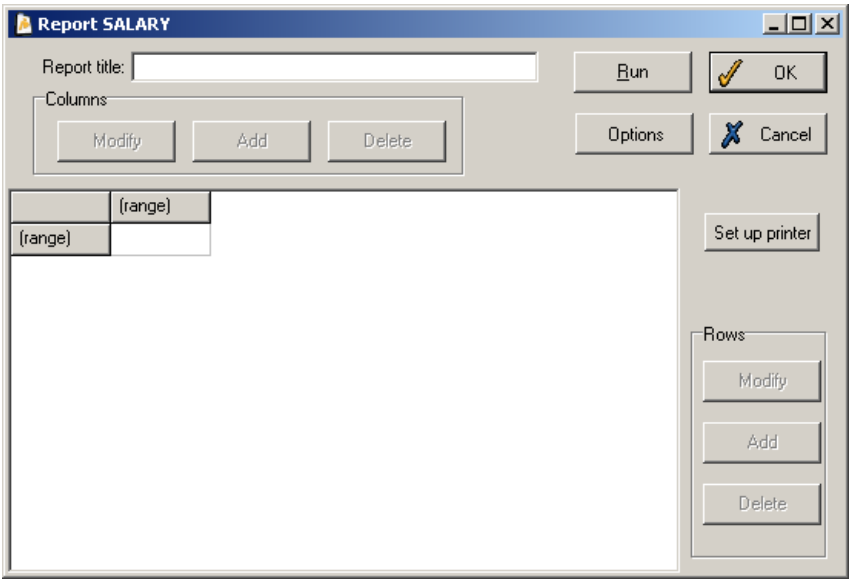
A form like this appears, containing any matrix reports that have previously been set up on your system:



To create a new report, click **Add** to display the following form:



Enter a new report name (one which does not already exist in the drop down list) and click **OK**. This screen is displayed:

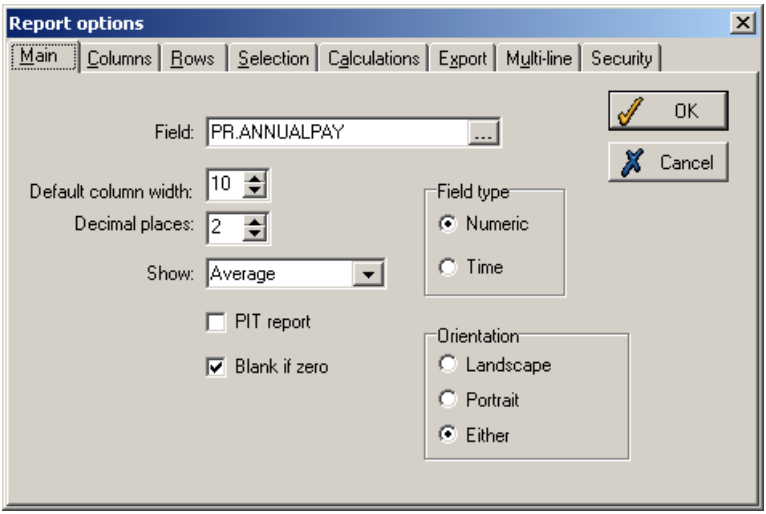


This is used to specify all the main details of the report.

First of all, enter a title into the **Report title** box. This title will be written at the top of the report, when it is displayed.

14.2 Report setup

All the settings of your report are defined from the **Report options** form, which is opened by clicking the **Options** button:



Of the eight panels of this form, only the first three (Main, Columns and Rows) are essential when creating a basic matrix report.

14.2.1 Cells

The first panel that appears on the **Report** options form is the **Main** panel, on which you should choose what type of information to show in the report cells.

In this example, an average salary report by department and job grade is being created, so the important details entered are the field and, in the **Show** box, the type of information to be displayed in each cell.

In the **Field** box, enter the name of the field used to calculate the values. Clicking the button to the right opens the **Expression builder**, which you can use to select the field (for this example, **Annual pay**).

The **Default column width** is 10 characters, which is ample for the **Annual pay** field. For other types of field, the width can be increased or reduced. Also choose the number of **Decimal places** to be shown, and select whether the **Field type** is to be **Numeric** or **Time**.

The drop-down list for the **Show** box contains all the types of information (count, total, etc.) - for this report, **Average** has been selected.

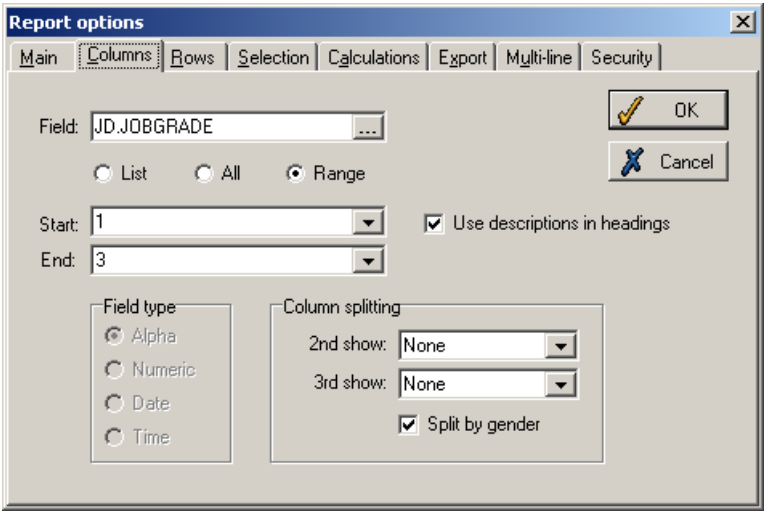
The **PIT report** tick-box should be ticked if you wish to report on past or future details (the point-in-time date must then be entered when the report is produced).

Tick the **Blank if zero** box if you wish to show a blank cell instead of any zero values, so as to make the report clearer to read.

You can also specify the **Orientation** - if **Either** is selected, the default settings of the printer will be used.

14.2.2 Columns

Select the **Columns** tab to open this panel:



This is used to decide the values used for each column. Continuing with the example of the average salary report by job grade and by department, the columns will be used to represent the grade (i.e., each job grade will have a different column).

Enter **Job Grade** as the **Field** (use the **Expression builder**, if required).

Now choose how to show the grade columns:

- **List** - this allows you to choose the order of the grades within the columns, or to group the grades (e.g., grades 1 to 3 in one column, 4-6 in the next).

- **All** - this requires no further prompting but simply shows all grades, one per column.

- **Range** - this enables you to specify a range of grades to be shown, rather than all grades. When selected, you must then use the **Start** and **End** drop-down lists below to choose the range to be included in the report.

For this example, **Range** has been chosen, and job grades 1-3 will be included in the report.

If you wish to see the descriptions of the job grades rather than their codes, tick the **Use descriptions in headings** box.

Column splitting

The **Column splitting** section in the bottom-right of the panel allows you to divide further the information within each column. Each column is already set to show the average salary for a particular job grade, but you can divide this information further so as to show, for example, minimum and maximum salaries as well as the average, or to split the information by gender.

To show minimum and maximum amounts as well as the average, use the **2nd show** and **3rd show** boxes to select **Minimum** and **Maximum** (in either order). Note you can also choose to show totals, medians, etc.

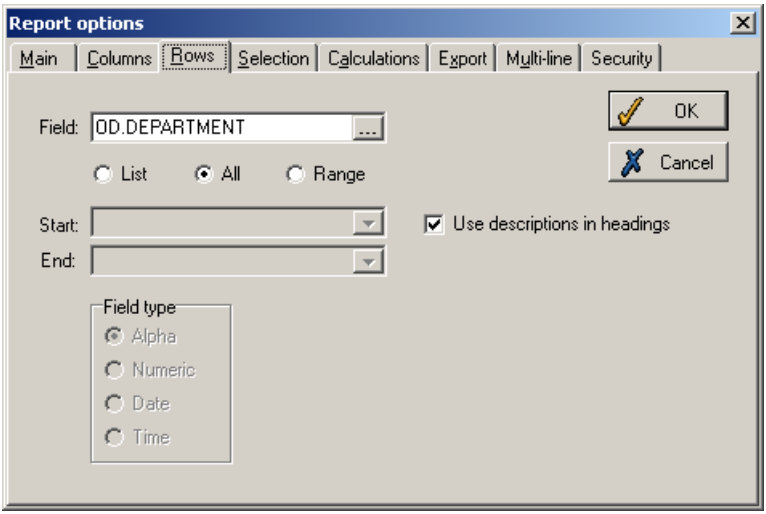
Alternatively, split the columns to show male and female information separately. To do this, tick the **Split by gender** box.

NB: You cannot **Split by gender** if you are also using the additional **2nd** and **3rd show** splits.

In the example on page 167, the **Split by gender** option has been selected.

14.2.3 Rows

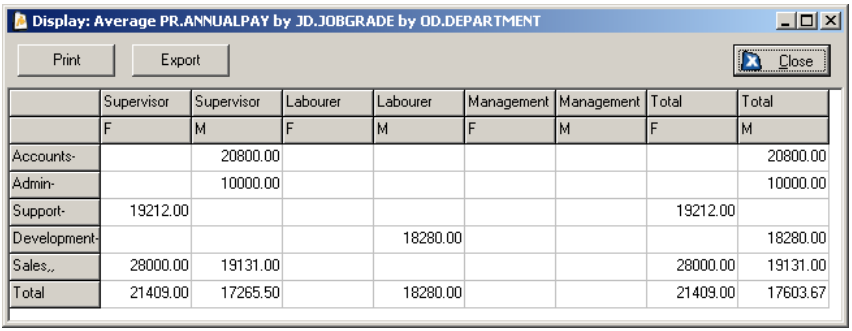
Once you have selected the column information, click on the **Rows** tab to define the information to be shown in the rows:



Select the **Field** in the same way as on the **Columns** panel. In this example, each row is to show a different department, and **All** departments are to be included in the report.

Once these first three panels have been completed, you can view your report. The other panels are only necessary for more advanced reports.

Click **OK** to return to the main report set-up form. Then click the **Run** button to display the report. You will first have to select the range of employees to include in the report. Once you have done so, the report will look like this:



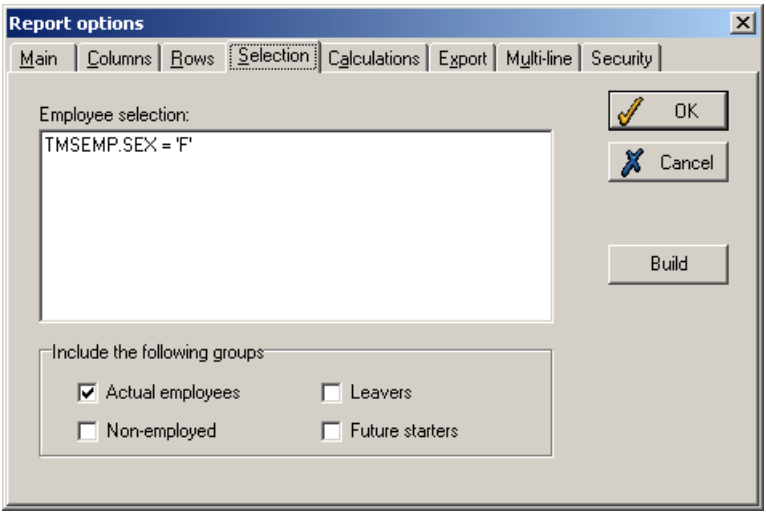
	Supervisor	Supervisor	Labourer	Labourer	Management	Management	Total	Total
	F	M	F	M	F	M	F	M
Accounts-		20800.00						20800.00
Admin-		10000.00						10000.00
Support-	19212.00						19212.00	
Development-				18280.00				18280.00
Sales,,	28000.00	19131.00					28000.00	19131.00
Total	21409.00	17265.50		18280.00			21409.00	17603.67

This report can now be printed, by clicking the **Print** button, or exported, by clicking **Export** (see page 171 for setting export details).

The other panels on the report options form allow more advanced details to be set up.

14.3 Selection

Clicking on the **Selection** tab brings up the following panel:



This panel works similarly to the **Selection** panel in the Report Writer.

Use the tick boxes at the bottom to specify which types of employees are included (in this example, only **Actual employees** are included in the report).

In the main **Employee selection** box, you can enter an expression to give advanced criteria for who is included in the report. The selection expression must have a result of either true or false, e.g., TMSEMP.SEX='F', which only selects female employees, or PR.ANNUALPAY<20000, which selects all employees who earn less than £20000.

For more information about using this panel, see the **Selection** section of Appendix 3, on page 306. A full explanation is given in section 7.2 of the Report Writer manual.

14.4 Calculations

The calculation option is designed to support more advanced reports (involving complex expressions) and is not required for the basic operation of the reporting function.

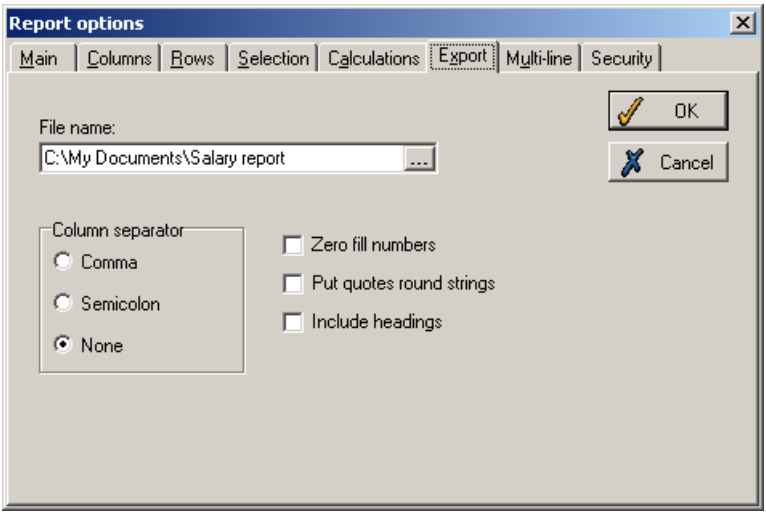
Calculations can be used to ensure that your reports show the exact data required.

For further information on using calculations within reports, see the **Calculations** section of Appendix 3 (see page 308). The calculations for matrix reports work in exactly the same way as those for column reports, covered in Chapter 6 of the Report Writer manual.

14.5 Export

As with column reports, matrix reports can be exported to a defined location, so they can be opened with another program.

Click the **Export** tab to open this panel:



You must enter a **File name** for the report to be saved as. This must include the full file path in which the report will be saved. The button at the right of the box allows you to browse to the required location.

In the **Column separator** section, you can select a symbol to use to separate columns in the exported report, which may be necessary depending on the program you wish to use to open the exported report. You can choose **Comma**, **Semicolon** or **None**.

The three tick-boxes give further options:

- **Zero fill numbers** - tick this and all data in numeric and time fields will be filled to the edge of the boxes with zeros rather than blank spaces.

- **Put quotes round strings** - this means that all alphanumeric and time fields will be enclosed in quotation marks.

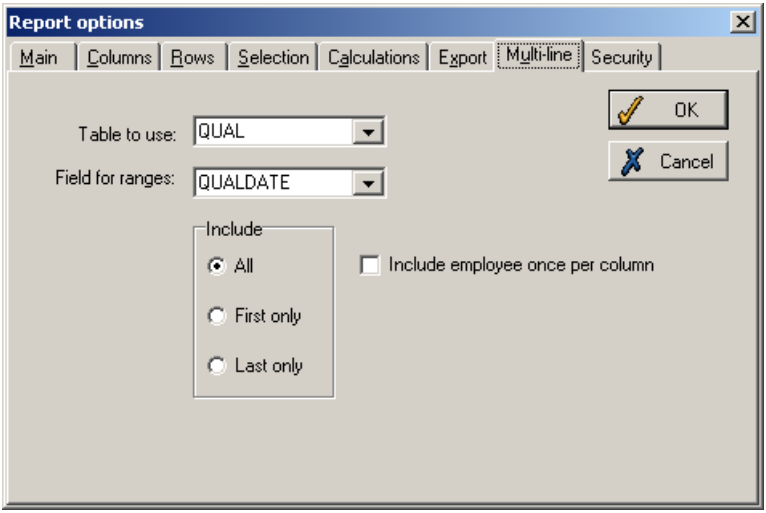
- **Include headings** - this must be ticked if you wish to see the headings at the top of each column.

Once you have selected the export details, click **OK**. When you run the report, click the **Export** button, and the report will automatically be exported to the file path given on this panel.

14.6 Multi-line

Some tables (groups of fields) within HR Manager are known as multi-line tables (e.g., **Qualification details**, **Appraisal details**). This means that instead of only ever showing a current value (with past or future values held in history where applicable), all values are held to be current and there are therefore multiple records.

Multi-line tables can be used in matrix reports, but work in a slightly different way.



Select the multi-line **Table to use** (note that your report can only use fields from this one multi-line table). In this example, a report is being set up to show what qualifications employees have. This requires fields from the **Qualification details** table.

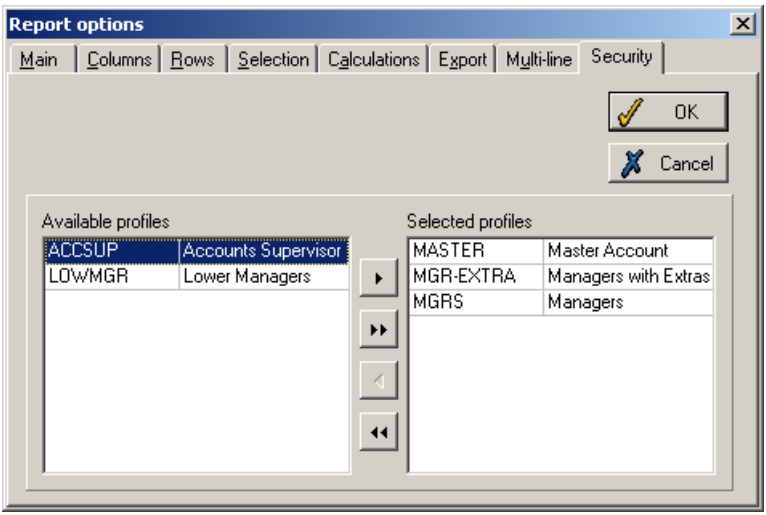
If you wish to limit the possible values, select a **Field for ranges** (in this case **Qualification date**), and then select one of the three options:

- **All** - this will include all qualifications employees have earned.
- **First only** - this will only include the first record for each employee, sorted by the **Field for ranges** (i.e., the first qualification each employee achieved).
- **Last only** - this will only include the last record for each employee, sorted by the **Field for ranges** (i.e., the most recent qualification each employee achieved).

You can now use fields from this multi-line table in the report itself, the selection expression and any calculations. You will see the selected multi-line table in the **Expression builder** whenever it is opened. Fields from this table will now work in exactly the same way as those from non multi-line tables.

14.7 Security

Click the **Security** tab to open a panel like this, showing which user profiles are able to access this matrix report:



All profiles for which you wish to give access to the report should be in the right-hand box, **Selected profiles**, while all those who are not permitted to access the report should be in the left-hand box, **Available profiles**. Move the profiles using the arrows, as described in **Select available items**, page 39.

CHAPTER 15

MASS CHANGE

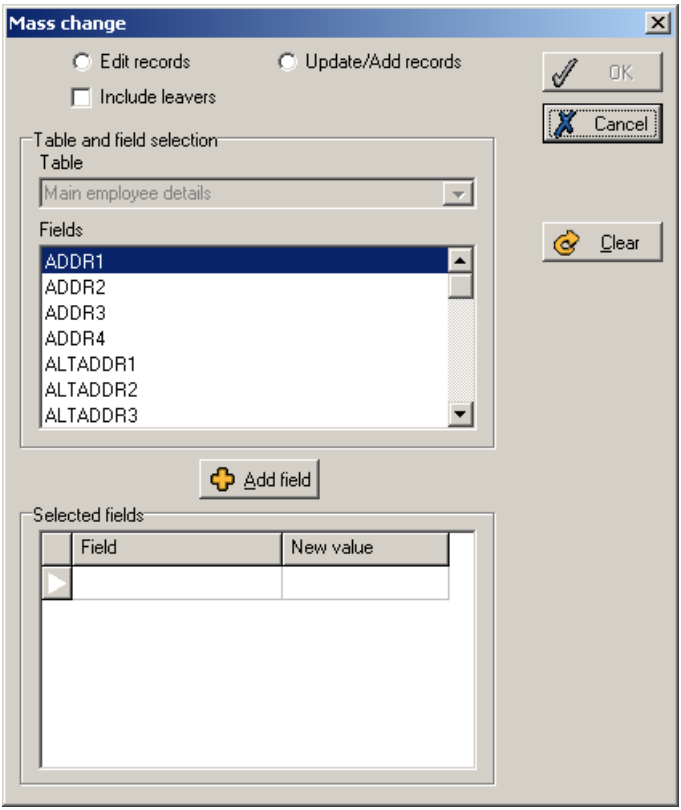
15 Mass Change

The **Mass change** facility enables you to edit, update or add new records for a range of people at the same time. For example, you may wish to make a change to the holiday entitlements for a group of employees, or add a new training record for a number of employees who have attended the same course.

There are two options on the **Mass change** menu: **New mass change**, which allows you to define the details of a new mass change that you wish to perform, and **Run mass change**, which allows you to run a mass change that has previously been saved.

15.1 Mass change on non multi-line records

This section explains how to define a new mass change for the majority of fields - those that are not multi-line. First, select **New mass change** to display this form:



You can make the mass change in either **Edit** or **Update** mode (see **Using Edit and Update**, page 42, for details on which to use in which circumstances).

If you select **Update/Add records**, you will need to enter the effective date on which you wish the field values to change.

In the **Table** drop-down list, select the table containing the field you wish to change. You will then be able to select the required field from the list below. Highlight the field you wish to change and click the **Add field** button. This moves the field into the **Selected fields** box below.

You must now enter the new value you wish the field to change to. Click in the **New value** box and enter the value to change to. Some fields may have a drop-down list from which you can select the new value. For numeric fields, it is possible to enter one of these symbols:

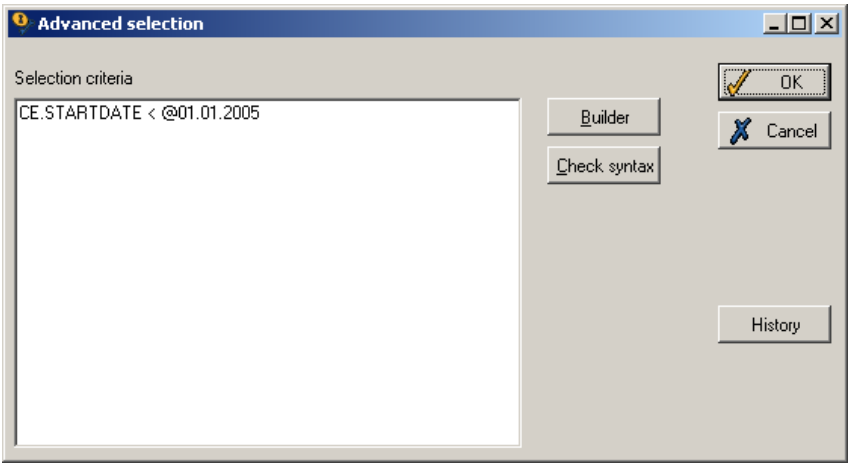
+ - * / followed by a value

For instance, if a number of employees are to have their pay increased by 5%, then select the field PR.PAYVALUE and in the new value box type *1.05. The new value of PR.PAYVALUE will then be obtained by taking the current value and multiplying it by 1.05.

Note that if the field you are changing is relevant to leavers as well as current employees, tick the **Include leavers** box.

Select employees to include

Click **OK** and the **Select range** form will appear, which you should use to select which employees are to be included in the change. Once you have selected the range in the normal way, click **OK**; this opens the following form:

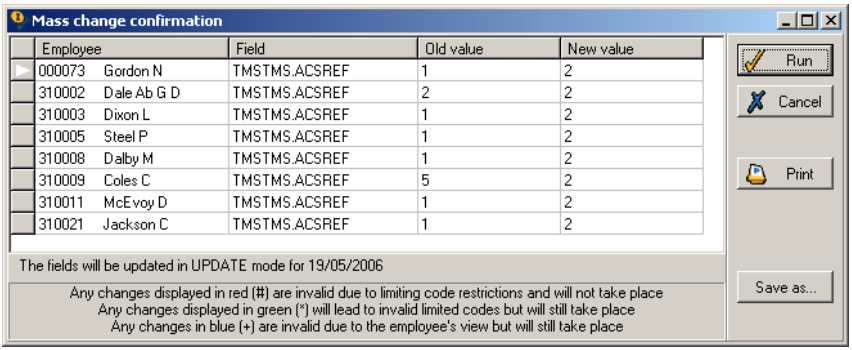


This allows you to make a more advanced selection of employees to include in the mass change. The above example specifies that the mass change is only applicable to employees who started at the company before 1st January 2005. Note that any selection criteria you enter will only apply within the range that you selected previously on the **Select range** form (i.e., if departments 12-14 were selected, then this example would apply to all employees in departments 12-14 who started before 1st January 2005).

See **Selection** in Appendix 3, page 306, for more details.

Confirmation

Click **OK**. A table like this is displayed:



Employee		Field	Old value	New value
000073	Gordon N	TMSTMS.ACSREF	1	2
310002	Dale Ab G D	TMSTMS.ACSREF	2	2
310003	Dixon L	TMSTMS.ACSREF	1	2
310005	Steel P	TMSTMS.ACSREF	1	2
310008	Dalby M	TMSTMS.ACSREF	1	2
310009	Coles C	TMSTMS.ACSREF	5	2
310011	McEvoy D	TMSTMS.ACSREF	1	2
310021	Jackson C	TMSTMS.ACSREF	1	2

This table lists all the employees for whom the mass change will take place. You have the option to delete employees from the list or to change individual values.

To change the new value for an employee, click in the relevant employee's **New value** column and enter a different value.

If you wish to delete an employee from the mass change, click in the grey box to the left of that employee's record. Then confirm the deletion when prompted. If multiple records are being changed, make sure that you delete **ALL** lines referring to that employee (where necessary). This is particularly important whenever the change is being run in **Update** mode as you will have to delete not only the field but also the related date.

NB: If any of the employee records in this table are highlighted in red, green or blue, see **Maintain validity of data**, page 183, for details on the action to take.

If you wish, you can save the change before going ahead - to do this, click the **Save as...** button. You will then be required to enter a unique name and a description of the change. Click **OK**, and the mass change is stored to the file. You will then be able to access the mass change again by using the **Run mass change** function, and selecting it from the list of all saved mass changes.

Once you are satisfied that the form represents the changes you wish to make, click **Run** to perform the mass change, and then confirm the action when prompted.

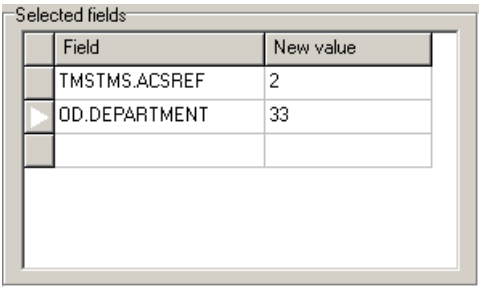
When the mass change is completed, you will be asked if you wish to perform another mass change. If not, click **No** to leave the mass change form.

Tips

- Clicking on **Cancel** anywhere within the forms mentioned above returns you to the previous form in the sequence. This enables you to see the consequences of selecting different fields or selection criteria without having to commit to the change.

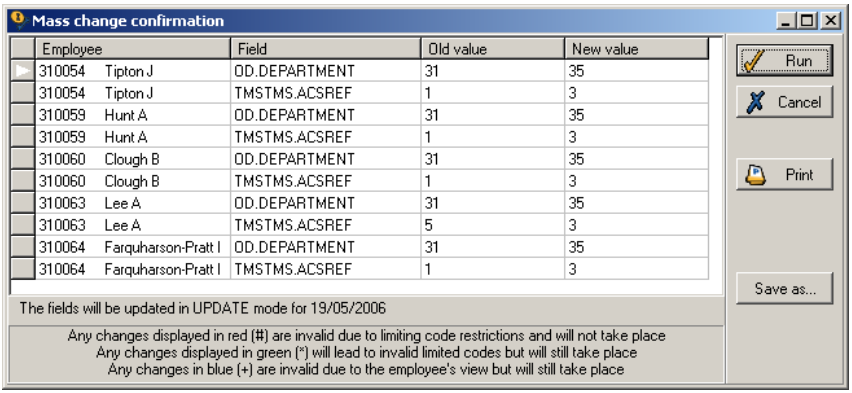
15.2 Mass change for multiple fields

If you wish to perform a mass change for numerous fields in the same, or in different tables, simply select all the required fields one by one so that they are displayed in the **Selected fields** list, like this:



This shows that the employees' access group and department will be amended.

Follow the same procedure as that used to change a single field, until the confirmation table appears, like this:



Employee		Field	Old value	New value
310054	Tipton J	OD.DEPARTMENT	31	35
310054	Tipton J	TMSTMS.ACSREF	1	3
310059	Hunt A	OD.DEPARTMENT	31	35
310059	Hunt A	TMSTMS.ACSREF	1	3
310060	Clough B	OD.DEPARTMENT	31	35
310060	Clough B	TMSTMS.ACSREF	1	3
310063	Lee A	OD.DEPARTMENT	31	35
310063	Lee A	TMSTMS.ACSREF	5	3
310064	Farquharson-Pratt I	OD.DEPARTMENT	31	35
310064	Farquharson-Pratt I	TMSTMS.ACSREF	1	3

Notice that a separate line is given for each change, so in this instance there are two lines for each selected employee.

Again, check that the correct information is going to be changed for the required employees. If you wish to delete an employee from the mass change, remember to delete each individual line relating to that employee.

Then either save or run the mass change in the same way as explained above.

15.3 Mass change for leavers

By default, leavers will be excluded from any mass change. If you do need to include them tick the **Include leavers** option on the first screen. This will include currently employed people and leavers. If you wish to restrict it to leavers only you will need to enter **CE.Status1='L'** on the **Advanced selection** form ('L' represents leavers).

15.4 Maintain validity of data in mass change

If any of the codes in your system use limited pairs or views, it is important to bear in mind how a mass change can affect the validity of these codes (see **Complex codes**, page 153, for details on limited pairs, and **Views**, page 209, for details on views). If your mass change will have an effect on a limited code, you will notice on the **Mass change confirmation** screen that the records are highlighted in red or green. If the mass change is invalid because of the employee's view, it will be shown in blue.

Red

The mass change function will not allow you to change a code that is limited by another if the new value entered would be made invalid by the limiting field.

For example, an employee whose **Job grade** is G1, where job grade G1 limits the **Job title** field to Manager or Assistant Manager: if you make a mass change of a group of employees' job titles to Department Supervisor, the employee in grade G1 will not be changed.

Any invalid 'changes' like this will be displayed in red on the **Mass change confirmation** screen and will not be allowed to take place. You can delete the employee from the mass change or cancel the mass change altogether.

Green

Mass change does allow you to change the code in the limiting field, even if this causes the code in the limited field to be invalid. These changes will be displayed in green on the **Mass change confirmation** screen. This alerts you that a further change is required to make the limited code valid.

For example, you have an employee whose **Job grade** is G1 and whose **Job title** is Assistant Manager: you then create a mass change of employees' job grades to G2, but job grade G2 only allows the job title to be Trainee, Junior Technician or Apprentice.

This change will be displayed in green on the **Mass change confirmation** screen. It will be allowed to take place, but will cause an invalid limited code, meaning that you must later change the limited code. Alternatively, delete the employee from the mass change, or cancel the mass change altogether.

Blue

If a record is written in blue, this means that the code being entered, although valid in the user's view, is invalid in the employee's view.

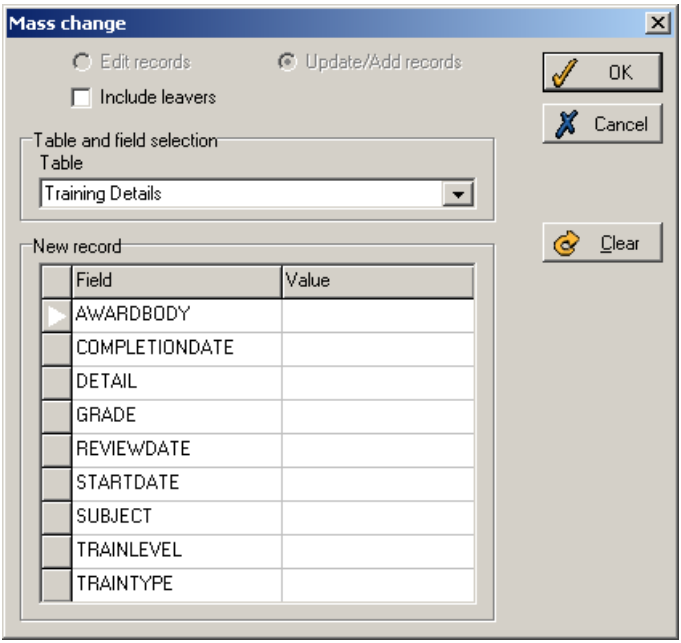
In this case, the change will take place, but you should note where the invalid code is, so that later you can either change the invalid code or change the way the employee's view is set up.

15.5 Mass change on multi-line records

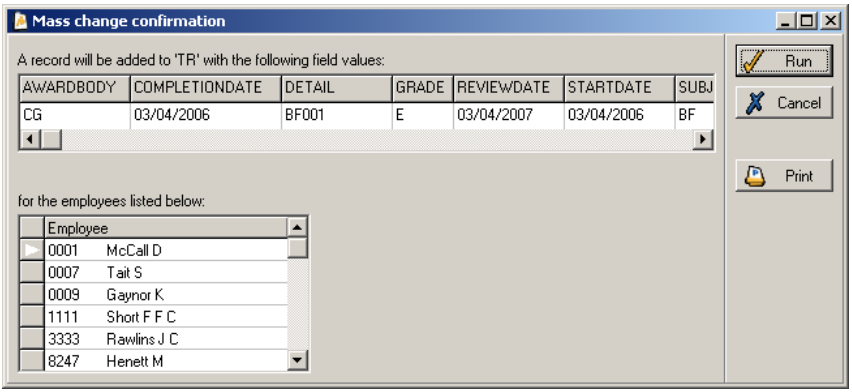
The **Mass change** function can be used to add new records to a multi-line table, and to edit existing records of a multi-line table.

15.5.1 Add records to multi-line tables

You may wish to add records to multi-line tables when, for example, a group of employees have all attended the same training course. To do this, open **New mass change** and select **Update/Add records**. Ignore the date box, as it is not relevant to multi-line records. Now select the multi-line table that you wish to update. In this example, **Training details** has been chosen:



All the fields of the table are now shown in the **New record** box. You must now enter a new value for at least one of the fields from the table. Click **OK** to move on to the **Select range** form, . Once you have done this, you will again see the **Advanced selection** form, which can be completed in the same way as for non multi-line tables. You will then see a confirmation screen like this:



The upper box shows the record that will be added to the **Training details** table for all the employees listed in the lower box. Should you need to, you are again able to delete employees from the list by clicking in the left-hand margin next to the employee and confirming when prompted.

Click **Run** to continue with the mass change, and then confirm that you wish to continue.

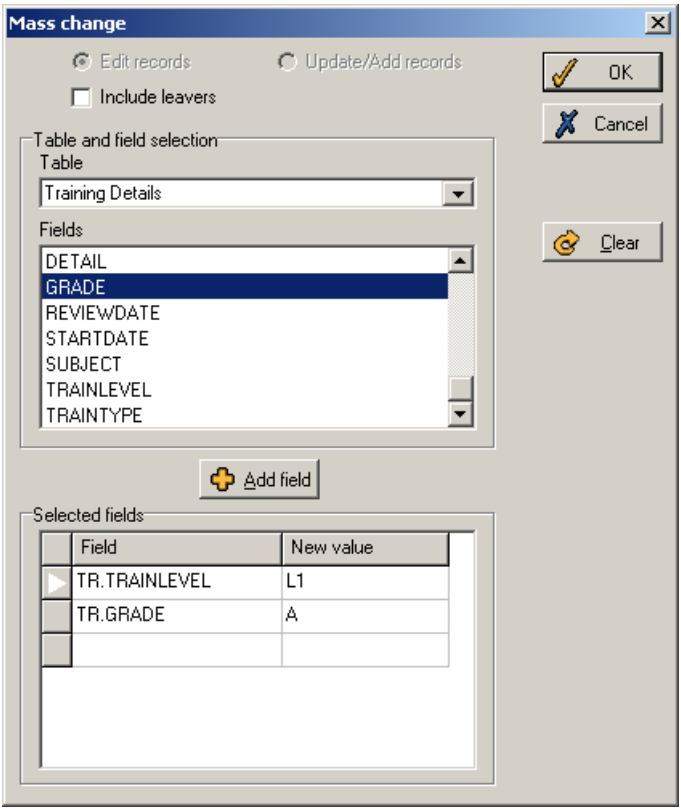
The mass change will be performed for the selected employees. When you now go into the relevant employee's training records you will see that the additional record has been added.

15.5.2 Edit multi-line records

You can also use the **Mass change** function to modify an existing record in a multi-line table rather than to add a new record. This may be particularly useful if you have added a record by mass change, and need to edit its details (e.g., if you previously entered details of a training course for employees, you could now specify which employees passed the course).

You need to use the **Advanced selection** option with care to ensure you select the correct records.

To edit multi-line records, select **New mass change** and select the **Edit records** box. Select the required table, and the fields that you wish to edit. You can then enter the **New value** for these fields:



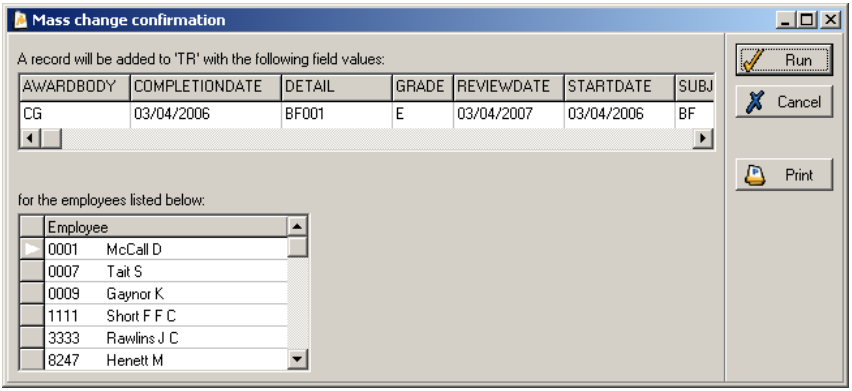
In this example, the level and grade achieved are being edited - these may have been left blank originally, or you may be replacing a value previously entered. Click **OK** to move on to the **Select range** form, where you should select the range of employees.

You then see the **Advanced selection** form. Instead of using this to select the employees, you should enter an expression which identifies which records are being modified.

If you leave this form blank, all training details records for the employees within the selected range will be modified. In this example, it only the records relating to a particular training course are required, so enter an expression which identifies this course, such as the date it took place and the type of course:

TR.DETAIL = 'BF001' and TR.STARTDATE = @03.04.2006

This will select all records (belonging to the selected range of employees) of the detail 'BF001' and which were started on 03.04.2006. Click **OK** to open the **Mass change confirmation** screen:



The top box lists all records which will be changed, with the new values that will be entered shown in the box below. As with the other **Mass change confirmation** screens, if any records are written in red, green or blue, it means that this change creates invalid data (see **Maintain validity of data**, page 183, for details).

Again, you can delete any records that you do not wish to change by clicking in the grey box on the left-hand side next to an employee, and confirming when prompted.

When the box shows all records that you wish to amend, click **Run** to proceed.

CHAPTER 16

MAINTAIN USER PROFILES

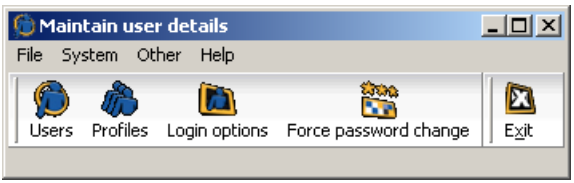
16 Maintain User Profiles

NOTE: The functions described in this chapter help control the way that Mitrefinch HR Manager can be customised to meet specific company requirements. It is therefore advisable to make these, and any other options in the **System** menu, available only to the system administrator.

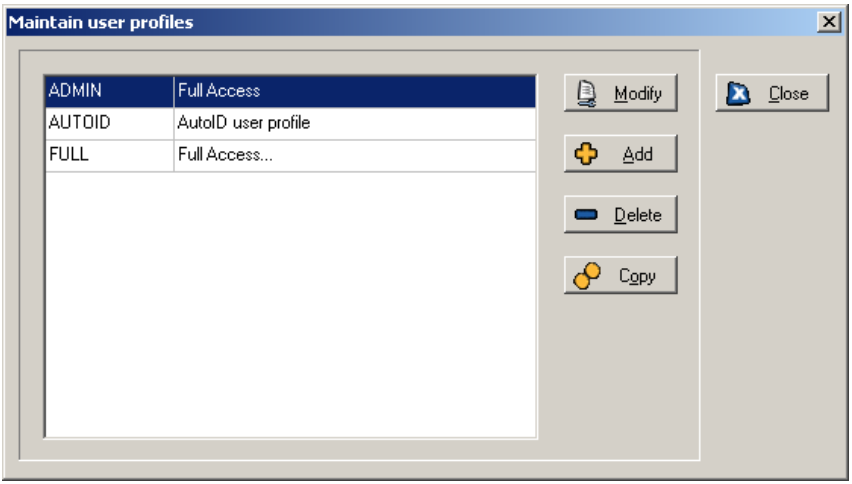
For security reasons, each user of the system must be assigned to a user profile. The profile determines what information a user can see on screen, and which facilities they are allowed to use (e.g., the ability to produce reports and to access employees' pay details should be restricted to a limited number of users).

16.1 Procedure for setting up a user profile

Select **Maintain users** from the **System** menu, to produce this screen:

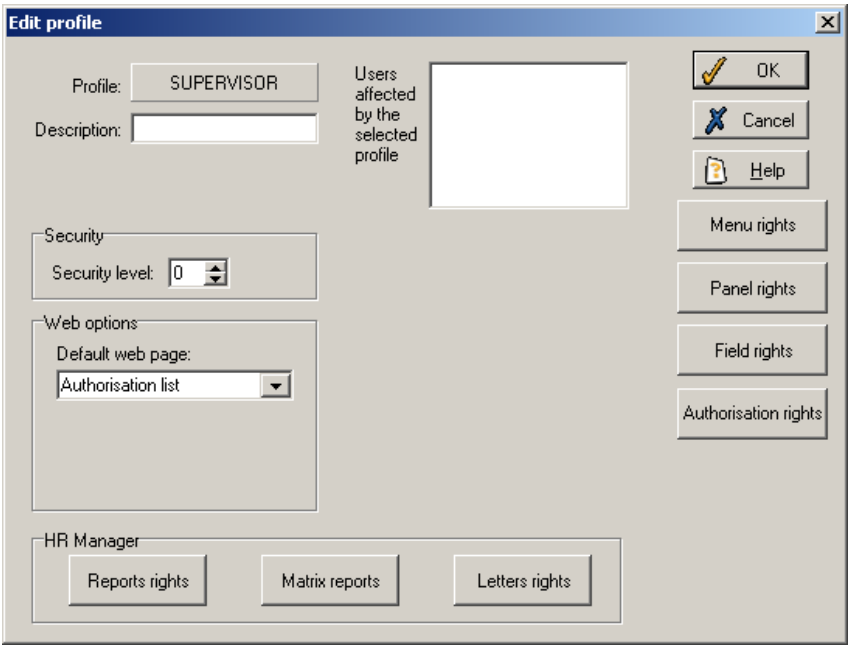


Click the **Profiles** icon, and this form appears:



The list contains all profiles that already exist on the system.

To create a new profile, click **Add**. Then enter a unique name for the profile, and click **OK**, to display this form:



(Note that there will be additional options available on this screen if Mitrefinch TMS is also licensed on your system.)

Enter a suitable **Description** of the profile, which will make its usage easy to remember.

As this is a new profile, the **Users affected by the selected profile** box will be empty. Once the profile has been saved, this box will display all users who are assigned to this profile. (See **Set up a new user**, page 202, for details on adding users to the user profile.)

Web options

The drop-down list allows you to select the **Default web page**, that will be displayed first whenever a user with this profile logs on to HR.NET.

For information on the other access rights that can be defined, see:

- **Menu rights**, page 193

- **Panel rights**, page 196
- **Field rights**, page 197
- **HR Manager rights**, page 199

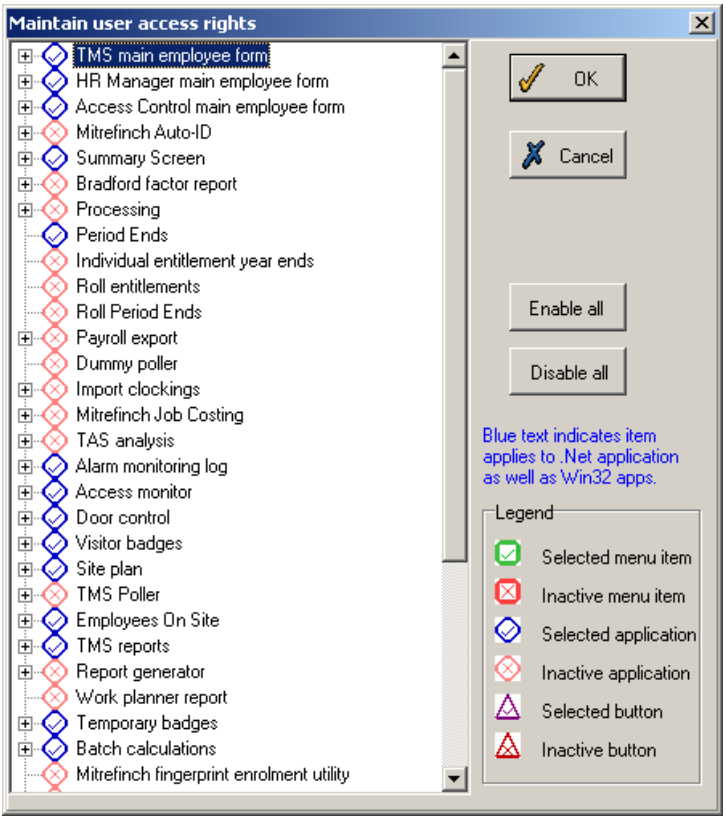
When you have completed the set-up, click **OK**. The new user profile will be added to the list of profiles.

Tips

- If you wish to add a new profile that is similar to an existing one, select the existing profile and click the **Copy** button. You will then need to enter a name for the new profile, and you can **Modify** it if required without affecting the original.

16.2 Menu rights

You will see a 'tree' view of the programs and menu options that are available on the system, showing which are accessible to this user profile:

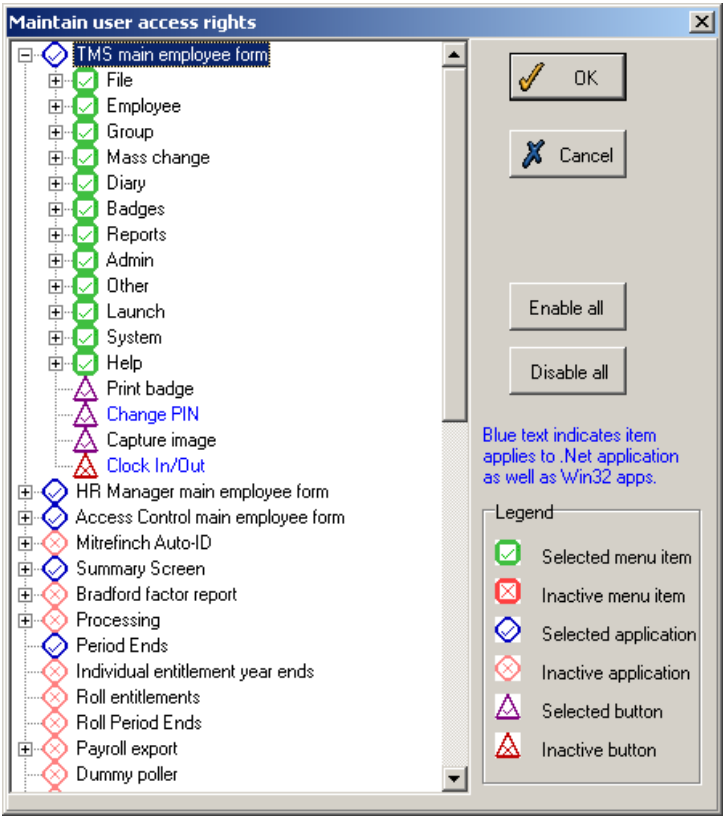


This list contains each application in all the Mitrefinch packages licensed on your system, showing whether this user profile has access or not. With the tree collapsed (as above) the list shows all the programs covered by the security system.

The icons are used to identify both the state (a tick indicates that access is allowed and a cross that access is prevented) and the type of option being controlled (a diamond shape is a program, a square a menu item and a triangle a button).

The programs that do not have a plus symbol next to them are protected simply by restricting which users can log in.

For those that do have a plus symbol, click on the plus to expand the application, and you can then enable or disable the options within the program. For example:



Here, the 'TMS main employee form' (i.e., WinTMS) has been expanded, and all the menus are listed (in this case, all are allowed), in the same order as they appear in the program. A menu itself can be selected or disabled, or the menu can be expanded (by clicking on the relevant plus symbol) and the individual items on it set to the required status. Individual buttons are also shown at the end of the list, and can be selected or made inactive.

To change the status of a program, menu item or button, right click on its icon. It will then change to the opposite state. Changing the status of an item will change all the items below it in the tree (e.g., disabling a program automatically disables all menus and buttons in that program).

However, enabling an item causes all items above it in the tree to be enabled as well (e.g., if you enable a menu within a disabled program, the program itself becomes enabled also).

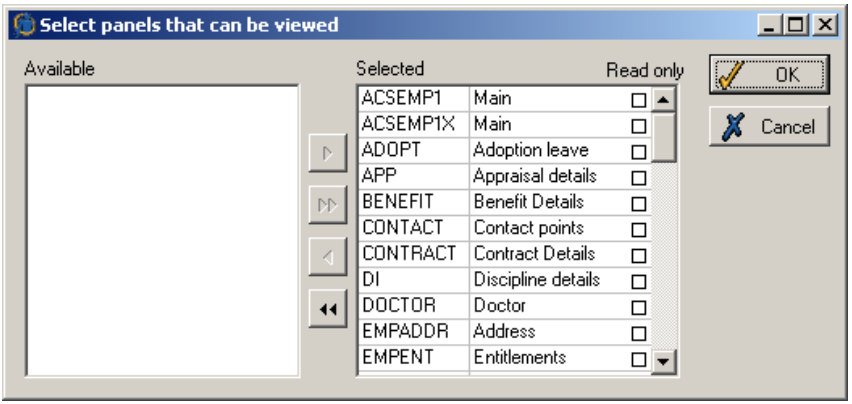
The buttons on the right should be used with care. Using them, you can quickly **Enable all** or **Disable all** programs, menu items and buttons for the current user profile.

Care should also be taken when changing the status of crucial items. For example, it is possible to remove the **Exit** item from the program, or allow a person access to programs but no options once in those programs.

If a user does not have access to a program called from another program then the menu option will not work even though it may appear to be active.

16.3 Panel rights

In the **Menu rights** section, you can control which programs and menu options are available to a user profile. In the **Panel rights** section, you can then decide which panels of employee details forms can be accessed by users on this profile. A form like this is used:

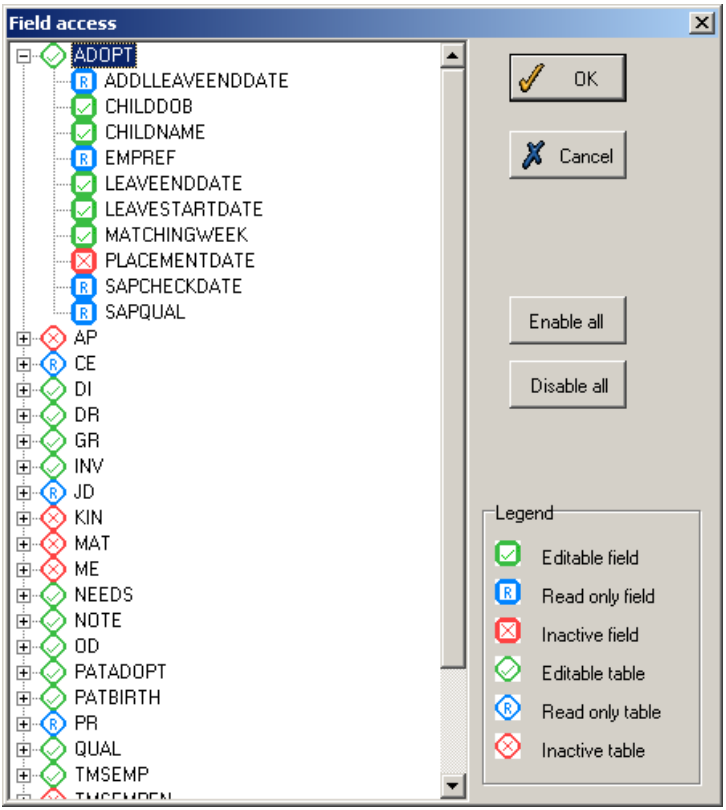


In this example, all panels are in the **Selected** box - use the arrows if you wish to deselect any (see **Select available items**, page 39, for details on using the arrows).

If you wish users on this profile to have access to a panel without being able to edit it, you should include it in the **Selected** box, but tick the **Read only** box, to the right of the panels in the form.

16.4 Field rights

When a user profile is given access to a panel, you can then specify the status of each field on the panel. Click **Field rights** to display this form:



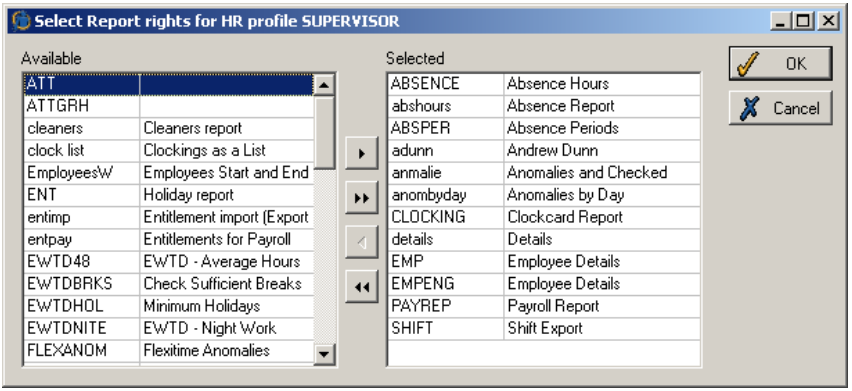
This form works in a similar way to the **Menu rights** form (see page 193). However, on this form there are three possible statuses for a field:

- **Editable** - fields with a green tick are fully accessible to this user profile, meaning they can be edited and updated.
- **Read only** - fields with a blue **R** can be seen by users on this profile, but the information cannot be edited or updated.
- **Inactive** - fields with a red **X** are hidden from users on this profile.

Right-click on a field in the list to change its status. Alternatively, you can use the buttons to the right of the list either to **Enable all** or to **Disable all**.

16.6 HR Manager rights

The three boxes in the HR Manager rights section, **Reports rights**, **Matrix reports** and **Letters rights**, all work in the same way. They are used, respectively, to control which column reports, matrix reports and letters the user is able to access. In this example, **Reports rights** is opened:



All the reports that you wish users on the current profile to have access to should be moved into the **Selected** box. This is done using the arrows in the usual way (see **Select available items**, page 39, for details on using the arrows).

CHAPTER 17

MAINTAIN LIST OF USERS

17 Maintain List of Users

NOTE: The functions described in this chapter help control the way that Mitrefinch HR Manager can be customised to meet specific company requirements. It is therefore advisable to make these, and any other options in the **System** menu, available only to the System Administrator.

17.1 About usernames

Each person who needs to access any Mitrefinch applications requires a valid username and password, which must be entered upon login. Failure to enter either will result in access being denied.

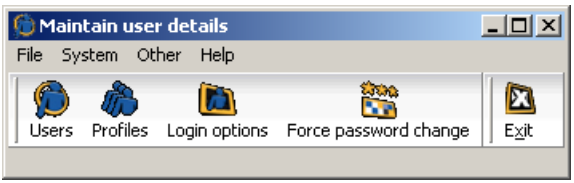
Once entry has been gained, the username determines the options to which the user has access (according to the profile - see **Maintain user profiles**, page 189). The name also determines the employee details a user has access to.

In addition, the username is included in the audit trail of employee changes, which is maintained each time a change is made to any employee details.

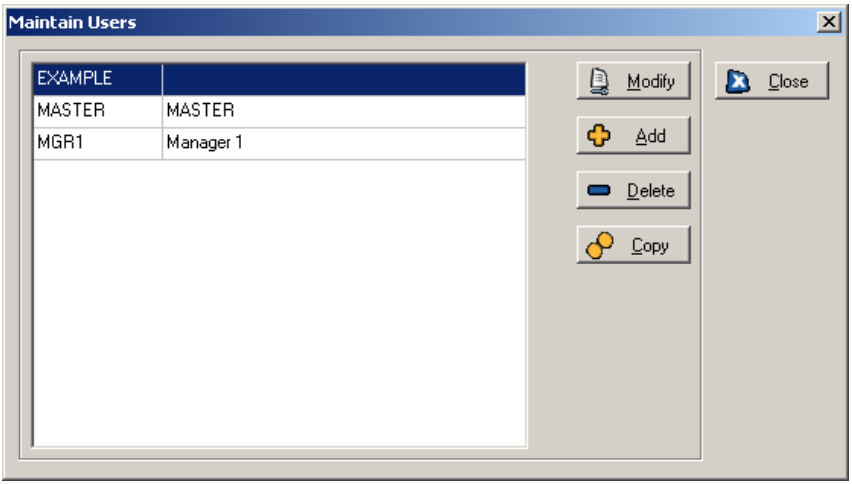
The username MASTER allows access to all option rights within the system and cannot be amended. The Master ID could be used by the System Administrator.

17.2 Set up a new user

Select **Maintain users** from the **System** menu. This screen appears:



Click the **Users** icon, to display this form:

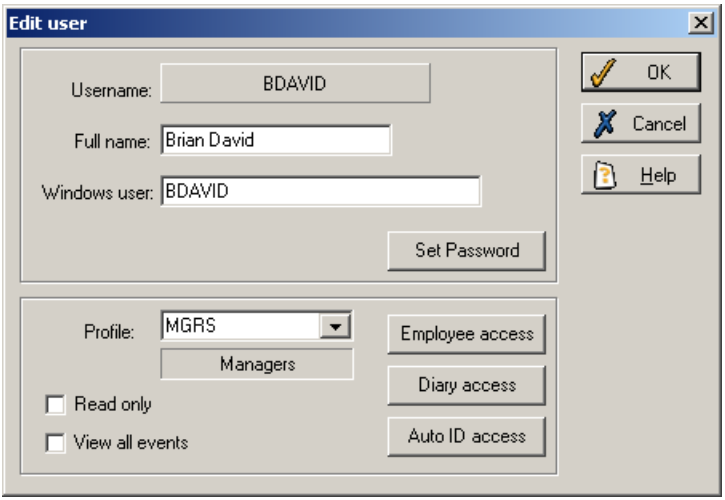


Click the **Add** button to add a new user to the list. Then enter a unique username and click **OK**.

Tips:

- If there are many users, try to choose user names that are easily identifiable and readily found in the list. For example, a combination of initials and surname, or surname followed by a number to differentiate between individuals with the same surname.

Once you have entered the username, this form is displayed:



Enter the user's full name, and also enter the user name that he or she uses for Windows. You should then set the user's password. This will be needed each time the user logs into any of the Mitrefinch programs. Click the **Set Password** button, and you will then have to enter and repeat a new password for the user.

The **Profile** drop-down list contains all user profiles that have been set up on your system. Choose a suitable profile for your user (see Chapter 16, **Maintain User Profiles** on page 189, for details on user profiles).

If the user is not to be allowed to edit any details on the system, tick the **Read only** box to assign just read-only access.

The **View all events** box determines whether or not the user has the right to see spent disciplinary records, or other data with sensitive access. If the user is allowed to view these records, tick the box.

For details on the buttons in the bottom right, see:

- **Employee access**, page 205
- **Diary access**, page 206

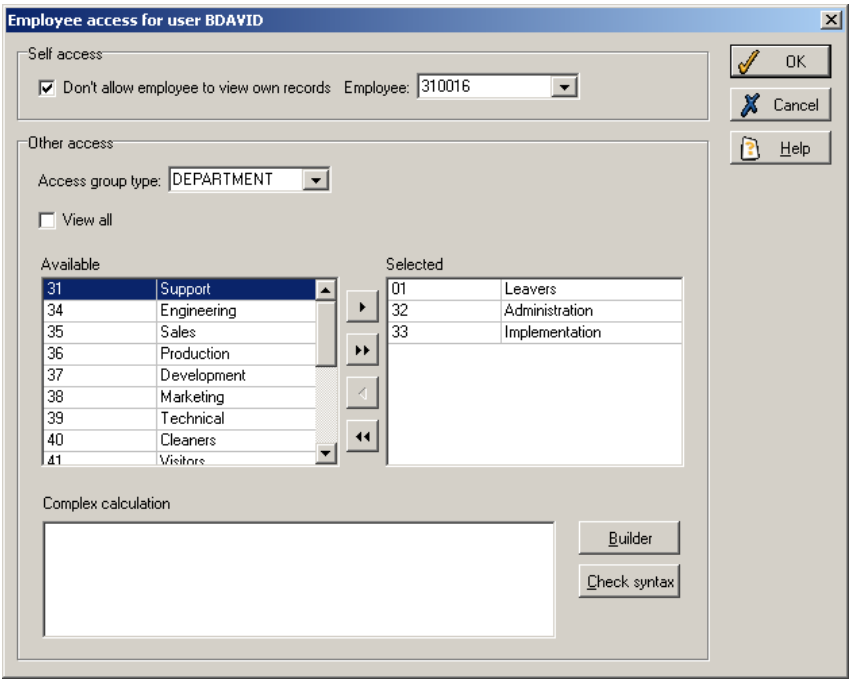
To save the settings of this user, click the **OK** button on the **Edit user** form. The new user will now appear in the **Maintain users** list and is able to log into the system.

Tips

- If you wish to add a new user who has similar rights to an existing one, select the existing user and click the **Copy** button. Enter a new user name and then **Modify** any details that are different..

17.3 Employee access

The **Employee access** button is used to specify which employees' records the user will be able to view and, if applicable, edit. Clicking the button opens this form:



The first section, **Self access** is important for users who are also employees on the system. If so, you must decide whether or not the user is allowed to see his or her own records, by ticking or leaving blank the **Don't allow employee to view own records** box. If the box is ticked, you must then select the employee's reference number from the drop-down list in the **Employee** box alongside - this tells the system which employee's records are denied to this user. This identification also means that, if the user has a diary, he or she will be alerted to new diary entries upon logging on to the system.

Now choose what **Other access** the user is to have. To allow the user access to all employees, simply tick the **View all** box.

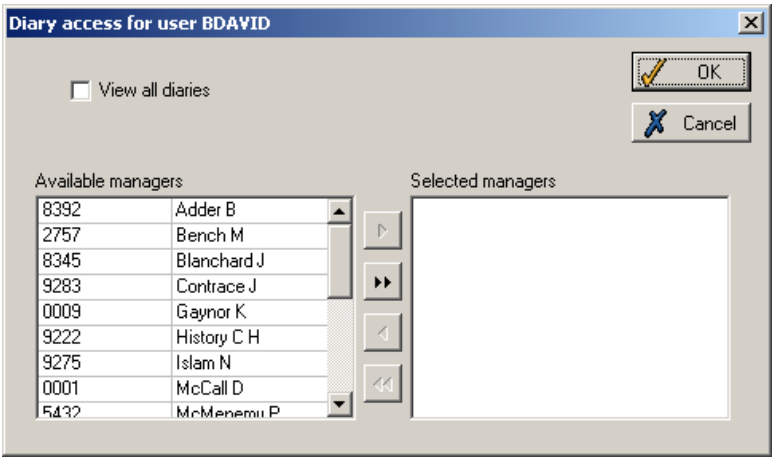
Otherwise, you must select which groups of employees will be accessible to the user. To do this, select the **Access group type** (in the example on page 205, **Department**, but it could be access group, location etc.), and then move all the groups of this type that will be accessible to the **Selected** box, using the arrows (see **Select available items**, page 39, for details on using the arrows). In the example on page 205, the user will have access to three departments.

The **Complex calculation** box at the bottom allows you to use a calculation to determine which employees the user can access. These calculations work in the same way as those for reports, letters and diary entries (see **Calculations** in Appendix 3, page 308).

Click **OK** to save the user's access to employees.

17.4 Diary access

On the **Edit user** form, click the **Diary access** button to select which managers' diaries will be accessible to the user:



If the user is allowed access to all managers' system diaries, tick **View all diaries**.

Alternatively, move any managers whose diaries the user will have access to into the **Selected managers** box, using the arrows.

NOTE: Even if identified on the **Employee access** form as not having access to his or her own records, the user will still be able to see his or her own diary (if the user has a diary).

Click **OK** to save the diary access settings.

CHAPTER 18

VIEWS

18 Views

Views can help prevent inaccurate data being entered on your system. They are useful on both a large and a small scale. In a large multi-site company, views can eliminate options that are irrelevant to users on a particular site. On a smaller scale, you can restrict options for an individual employee or group of employees.

Views are used to restrict the codes available in lookups (drop-down lists), so that only those relevant to the user and the selected employee can be chosen. This means that not only is it quicker for the user to find the required option, but also mistakes become less common.

For example:

A company has a manufacturing site and a sales site. For the two different sites, there are different rosters, job titles, departments, access groups etc., that are usually exclusive to one or other of the sites.

The vast majority of employees will only ever work on one of the two sites, so, when dealing with these employees, you can, by assigning them to **Employee views**, remove all the options that do not apply to their site.

You can also assign system users to **User views**, so that, when a manager is dealing with issues not directly related to employees, e.g., editing a roster, the user will only be able to access options relevant to his or her own site.

What is true in the above example for a company with multiple sites, is also true of smaller companies which have different departments, divisions, etc., each of which can be assigned to different views so as to limit the options available in lookups.

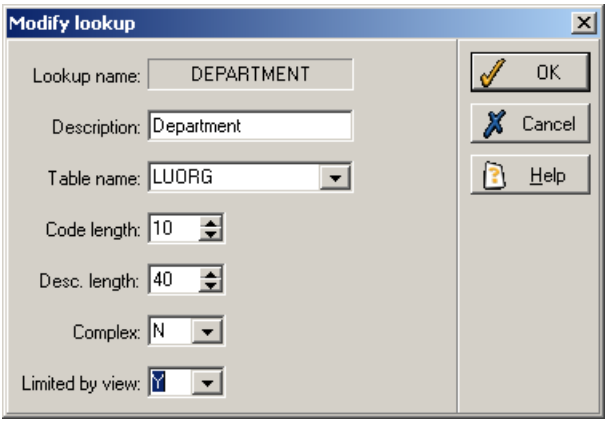
NOTES:

- Views make the system easier to use by eliminating unnecessary options. They are **NOT** designed to restrict a user's access and should not be used for security purposes. Security should be set in place with user profiles.

- Views do not operate for the MASTER user; this is a safety feature which prevents any codes becoming inaccessible to all users.

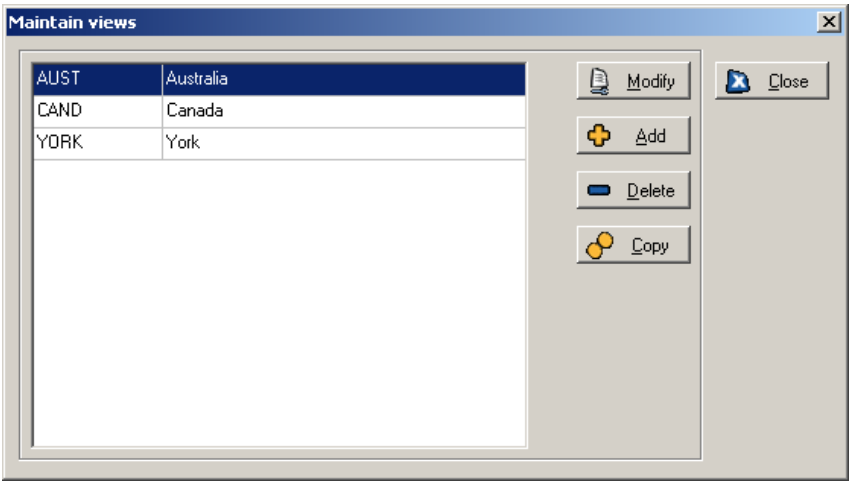
18.1 Set up views

To add views to your system, first you must specify which lookups will have their codes limited by views. To do this, open **Database definition** (DBDEF) from the main application folder. Select **Maintain lookups** to view the list of all lookups in your system. When you have selected the required lookup, click **Modify** to display this form (in this example for the **Department** lookup):



For views to operate on the lookup, set the **Limited by view** option to **Yes**. Repeat this for all lookups that you wish to be limited by view. (For details on the other options for maintaining lookups, see **Lookups**, page 264.)

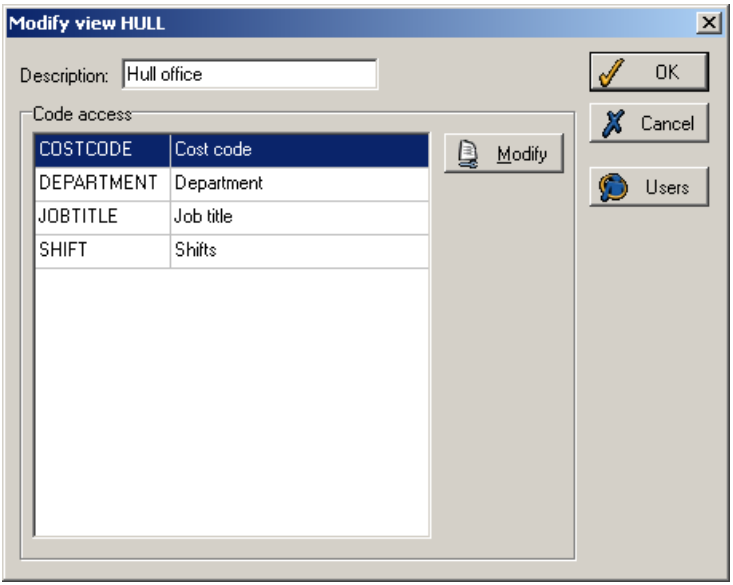
Once you have done this for all lookups you wish to limit by view, exit **Database definition** and open HR Manager as the MASTER user. A new option will have appeared on the **System** menu now that you have lookups that are limited by view - **Maintain views**. Select the option to display a screen like this:



In this instance, three views have been set up, relating to different sites of the company.

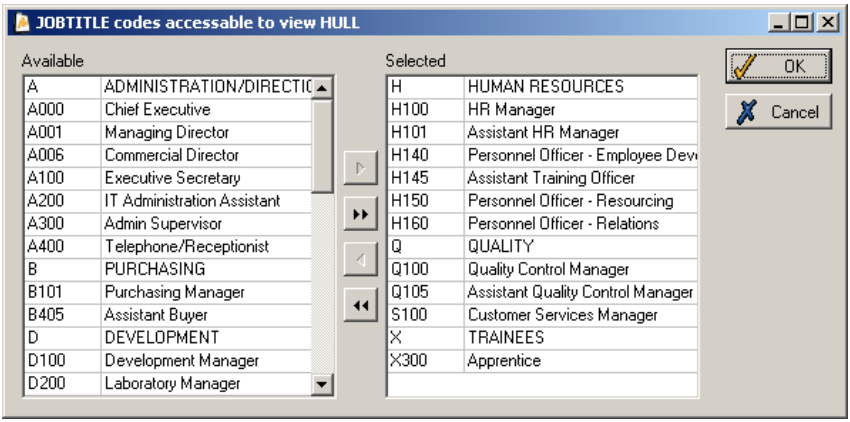
18.1.1 Add a new view

To create a new view, click **Add**, enter a name for the new view when prompted, and this form is opened:



The **Code access** box lists all lookups which, on **Database definition**, were selected to be **Limited by view**. You can now select which codes in these lookups are accessible for this view.

Select one of the lookups and click **Modify** to bring up this form:



Here you must select which codes are accessible from this lookup for the selected view. Move the codes that are to be accessible to the **Selected** box, using the arrows. Click **OK** when you have selected all required options.

NOTE:

- If no codes of a lookup are selected for a view, it is assumed that the setup has not yet been completed, and full access is given. This ensures that no view that has access to a lookup is denied access to all the options in it. If you do not want a lookup being modified at all by particular users, you should see **Maintain user profiles**, page 189, for details on either preventing access to this lookup, or giving read-only access to the lookup.

You should repeat this for all the lookups in the **Code access** box, and then the setup of the view is complete.

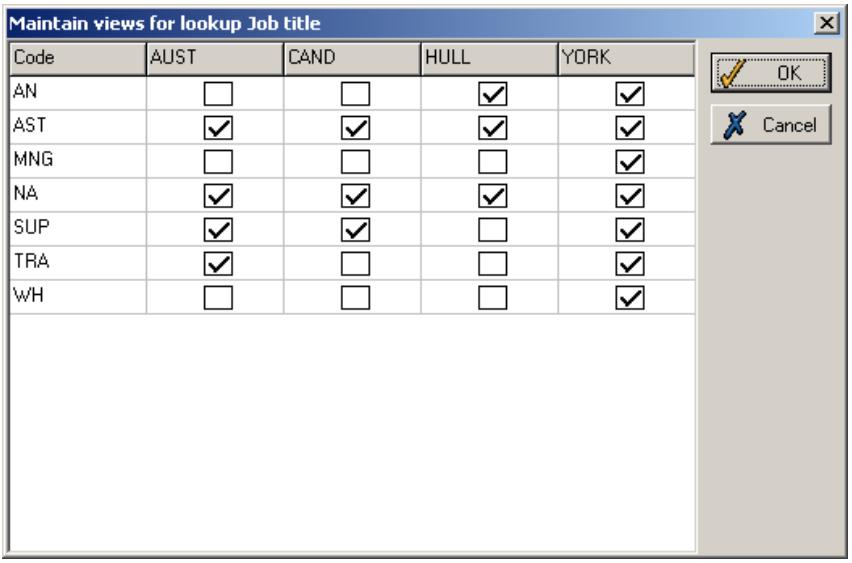
You can add as many different views as are necessary for your system, for example, you may need one view for each department, or perhaps just one view for each site.

Once you have set up the views, you will need to specify when the views are used. This is done on both the user level and the employee level. See page 215 for details.

18.1.2 Maintain limited lookups

If you have a new limited-by-view lookup in your system, or the options in a limited lookup have changed, there is a quick way of ensuring that all the views have the required level of access.

On the **System** menu select **Maintain codes**. Select the required limited lookup and click **Modify**. On the next form, **Modify list**, there will be a new button, **Views**. Click this to open a screen like this:



Code	AUST	CAND	HULL	YORK
AN	☐	☐	☑	☑
AST	☑	☑	☑	☑
MNG	☐	☐	☐	☑
NA	☑	☑	☑	☑
SUP	☑	☑	☐	☑
TRA	☑	☐	☐	☑
WH	☐	☐	☐	☑

All possible codes for the lookup are listed in the left-hand column. All views set up on your system are listed at the top. You can tick or untick any of the boxes to define which codes are accessible for which views (in the above example, the YORK view has access to all codes for this lookup, while the other views are denied access to certain of the codes). Click **OK** to save the setup for this code.

18.2 Assigning views

There are two distinct applications of views - user views and employee views. Remember that neither user views nor employee views operate while logged in as MASTER.

For views to function comprehensively, you should set up user views and employee views.

User views affect the individual user of the system - each user is assigned to a view which affects the options that can be selected in non-employee-related lookups. User views affect lookups on the **System** menu, and others that do not directly relate to employees, e.g., editing the details of a roster, editing a shift, entitlement codes, the **Group drop-down list** shown on the main form.

Employee views affect all lookups that contain employee-related information. Each employee will have one employee view - this limits the available options on lookups when a user is modifying this employee's record.

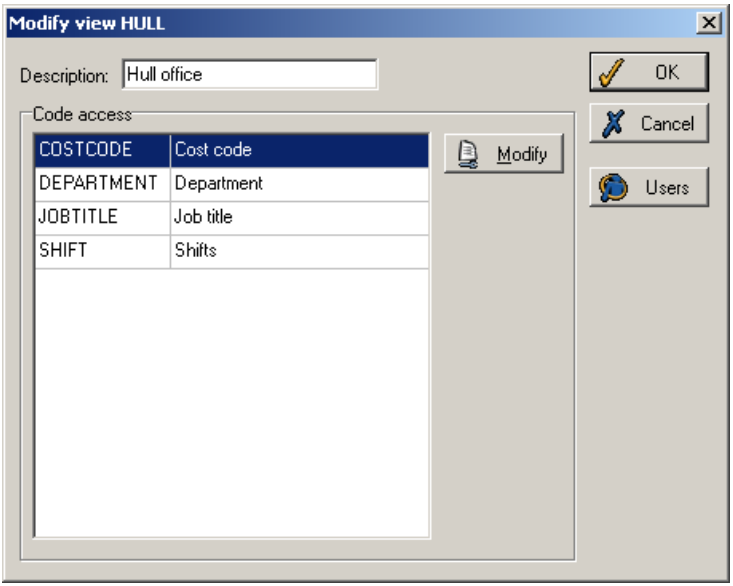
Employee views affect any lookups directly modifying employee details, e.g., department, job title, the shift pattern to which an employee is assigned.

18.2.1 User views

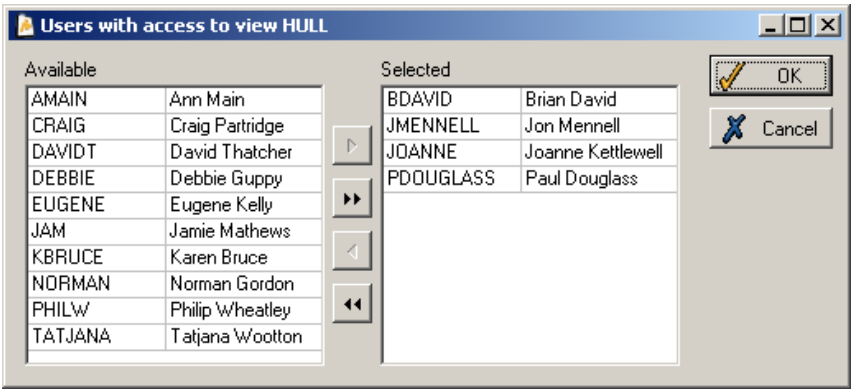
There are two ways of assigning views to a user.

By view

The first option is to assign users within the **Maintain views** section. Select the required view and click the **Modify** button, to display the **Modify view** form:



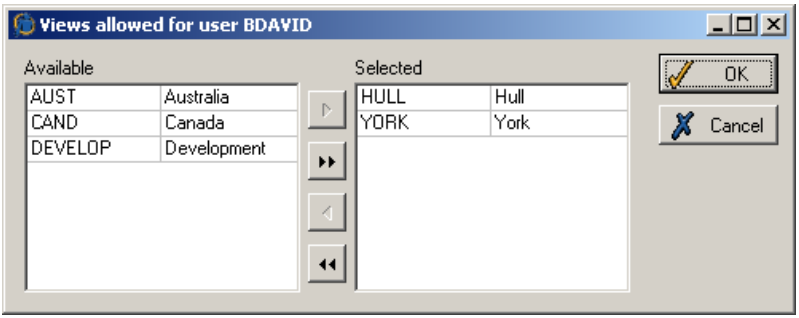
Click the **Users** button to the right of the form, to open this form:



Here you should use the arrows to move all users who are to have access to this view into the **Selected** box on the right. Note that users can be assigned to more than one view.

By user

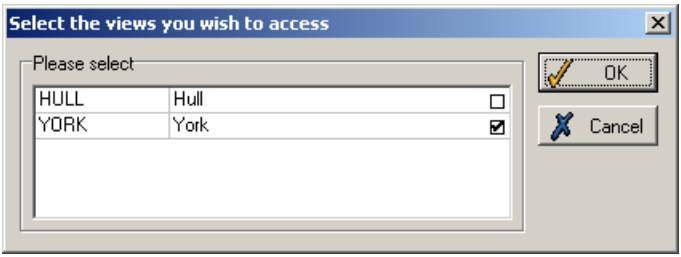
The alternative method of assigning views is to select **Maintain users** from the **System** menu, and select the views user-by-user. Click the **Users** icon, select the required user from the list and click **Modify**. This takes you to the **Edit user** form (see **Maintain list of users**, page 201, for more details on this form). On this form, you should click the **View access** button, to open this screen:



Here, move all the views you wish to allow for this user into the **Selected** box.

18.2.2 Users assigned to more than one view

When a user who is assigned to more than one view logs in to any Mitrefinch application, there will be a **View** button on the Login screen. Clicking this button opens the table below:



The user should tick the boxes of all the views he or she wishes to use at present. If one view is chosen, then only the codes in that view can be seen in any non-employee-related display of that lookup. If more than one view is chosen then all codes accessible to any of the selected views are shown.

In the above example, although the user has access to both Hull and York views, information regarding the York site needs to be modified, and so it is easier if the Hull-related options are not shown.

Once logged in, the user can change which views he or she is currently using by opening **Local preferences** from the **Other** menu. There will be a **Views** tab which, when clicked, opens the box above on which the views selected can be changed.

18.2.3 Employee views

These are the views used when editing any employee-related details. The employee view of the employee whose details are being edited is always the factor which limits the drop-down lists. Only if employee views are not used at all will the user view have an effect on an employee-related drop-down list.

Here is a common example of when they are used in TMS (in other Mitrefinch applications, the process is exactly the same):

The company manager is changing the shifts which a number of employees work. The employees are from various different sites, each of which have a different view. The manager needs to make sure that the shifts he enters for the employees are valid for the site at which they work (e.g., some sites may allow night shifts, others not). This will be guaranteed if the employees are all assigned to employee views.

This is because, when selecting the shift for an employee who works in the factory site and whose employee view is Factory, only the shifts relevant to employees at the factory site will be on the drop-down list. Once he has entered the shift for this employee, he moves on to another employee who works in the call centre site and whose employee view is Call centre. A different set of shifts, relevant to this site, will be shown on the drop-down list, so he can only select from these shifts for this employee. This continues for employees in all the different sites.

Assign employee views

Assigning employees to employee views is a simple task. In most cases, you will want to assign employees to a view depending on which company, department, location etc. they are in.

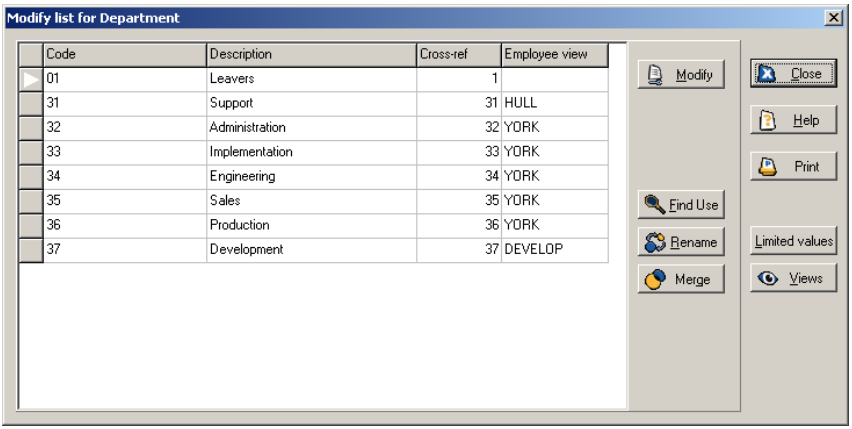
Note:

- Unlike system users, who can be assigned to multiple user views, each employee can only be assigned to one employee view.

To assign an employee to a view, you first have to decide how employee views will be separated (e.g., by company, by department). Open **Maintain preferences** from the **System** menu, and, on the **General** tab, there will be an **Employee view** section:

Select from the drop-down list the **Code for employee view** - this is how employees will be separated for views. In the above example, the field OD.DEPARTMENT has been chosen, meaning that all employees in a particular department will have the same employee view.

Then open **Maintain codes** from the **System** menu. From the **Maintain codes** list, select the lookup that you entered as the **Code for employee view** (in this case **Department**). Click **Modify** to display this table, which now has an additional column, entitled **Employee view**:



This list contains all departments on the system - in the **Employee view** column, you can assign each department to an employee view. If the column is left blank for any of the codes, this means that employees in this department will not be assigned to any employee view, meaning there will be no restriction on the options that can be selected for these employees (in the above example, the **Leavers** department is not at all limited by views).

Note in the above example how a number of departments each have the same view - this means that employees in each of these departments will have the same options available on the drop-down lists.

Now when any system user (regardless of user views) is editing any record relating to an employee, the options available in drop-down lists will be limited depending on which department the employee is in, and the view that has been assigned to that department.

CHAPTER 19

SET UP DIARY DEFINITIONS

19 Set Up Diary Definitions

As detailed in Chapter 10, **Diary**, on page 115, the diary is a reminder system that can show a date, time and message to a manager at a required time.

Diary notes can be entered manually by simply inserting an entry for any date or time, and manually typing a message (e.g. 'Meet directors for lunch').

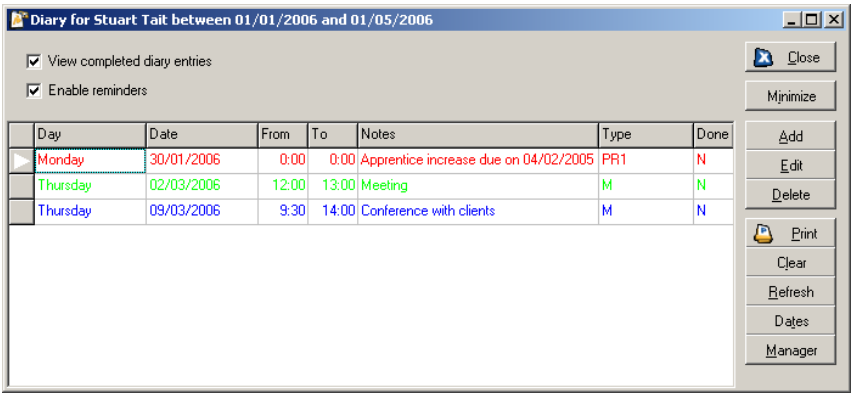
However, the primary function of the diary is to generate automatic diary reminders for any actions that need to be taken relating to employees on the database. You set up the criteria and then each time an employee satisfies those criteria a diary entry is made.

For example, to have a diary reminder of disciplinary events to be followed up, you would ask the system to generate a diary entry for every individual who has a disciplinary review date entered but not a disciplinary completion date. You would not need to specify the names of the individuals concerned or enter the disciplinary details yourself.

All diary definitions entered in this way will only appear in a diary if **Autotask** is run. When **Autotask** runs, it searches through each employee record and each diary definition. If the employee meets the selection criteria, a diary entry will be created for the relevant manager (see Chapter 23, **Autotask** on page 283, for further details).

You are able to specify how many days in the future diary entries are shown for, and you can set up the system to delete automatically all diary entries when they are no longer relevant.

A typical diary could look like this:



This manager has three current diary entries, one of which is automatic and two of which are manual entries.

See **Diary entries**, page 117, for details of what is displayed on the diary.

19.1 What is a diary definition?

A diary definition is a type of diary entry. For example you may have one definition set up to remind managers of reviews that are due, and another set up to remind the relevant people that someone is due to retire. Each diary definition can contain a message, a list of the diaries in which the message will appear (i.e. a list of the relevant managers), a date and the employee selection (i.e. the employees to whom the diary entry is relevant).

Once you have set up a diary definition it can be modified, copied or deleted.

19.2 Before setting up automatic diary definitions

Common examples of automatic diary definitions that you might want to set up are:

- Birthday pay rise for apprentices
- Disciplinary warning which needs to be followed up

- Qualification due to be renewed
- Long Term Service award due

To find out how some commonly required diary definitions are set up, see **Appendix 2: Example diary definitions**, on page 297.

There are four main elements to setting up an automatic diary definition:

1. What is the message you wish to appear in the diary?

For example, 'Birthday pay rise due for (*apprentice name*) on (*birthday*).'

Keep it brief. Always include the reason for the entry and, if it is a reminder of a forthcoming event, include the date on which the event is actually due (see **Frequently used diary functions**, page 225).

2. Who do you wish to receive the diary message?

For example, your own diary, the apprentice's manager or another specified manager.

3. How are you going to select the employees (in this case the apprentices)?

For example, all those whose job title is 'apprentice'.

If the diary entry applies to all employees you can use a selection expression like:

Status1='A' or **Startdate>0**

If you wish to select particular employees you must think of criteria which are specific to those employees. For example, their type of contract or job grade, or whether they hold a particular qualification or belong to a pension scheme.

4. On which day do you want the diary reminder to appear?

For example, do you want it to appear on the actual birthday date, or a week or two earlier so that you have time to deal with it?

You have to decide whether you want the entry to appear before the event (as a reminder that something needs to be done) or on the day of the event. The individual diary holders have the option to change the date entries on their diaries. For example, you may choose to put in a diary reminder that a disciplinary follow up is due, two weeks before it is actually due.

The diary message should contain the date by which it is due. If the user subsequently arranges the follow up meeting, the date and message can be changed by the user to reflect this. (The date would be changed to reflect the actual date of the meeting and the message might state who will be present.)

Think about the diary functions that will be required in your organisation and consider how you would set up each of the four categories above.

19.3 Frequently used diary functions

When you start to create the diary definitions you will need to understand how to create the messages and selection statements you have decided upon.

If you have already learnt to use the report writer (see Report Writer manual for details), the following functions may be familiar to you:

CODEDESC

Use this in an expression to display the code description rather than just the code value. For example, **DEPARTMENT** will display the department code (e.g. 31), whereas **CODEDESC[DEPARTMENT]** will display the description (e.g. Sales).

INCDATE

This function can be used to increase or decrease a date by any number of years, months, weeks or days. The format is **INCDATE[DATE, n]**, where **DATE** is the date to be increased or decreased, and **n** is the amount by which the date is to be changed. For example:

- **INCDATE[STARTDATE, +3m]** - gives a date which is three months after the start date. This might be when you want to do a first review of new starters.

- **INCDATE[CONTSERV, +20y - 2w]** - increases the continuous service start-date by twenty years minus two weeks. This could be the diary reminder date on which you want a reminder of someone's twenty years of service to appear.

NEXTANNIV

This is similar to INCDATE but specifically finds one year on from a given date. For example:

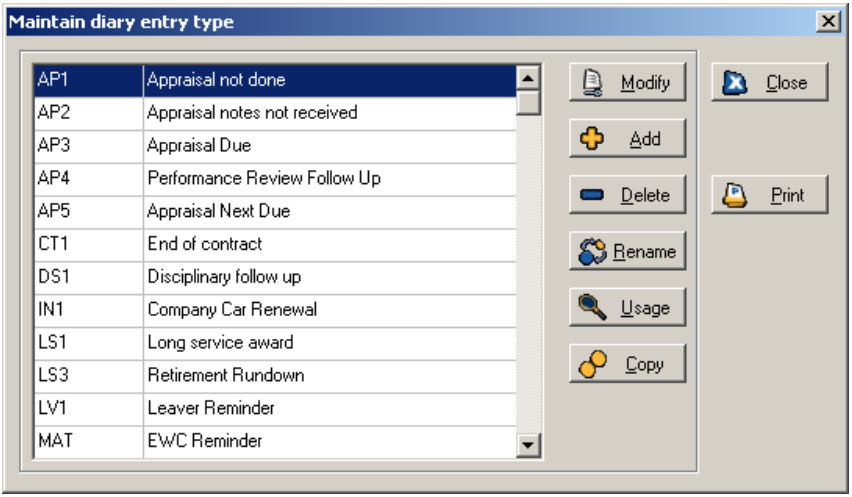
- **NEXTANNIV[DOB]** - the next birthday.
- **NEXTANNIV[STARTDATE, -1m]** - gives a date one month before the anniversary of the start date.

CURRDATE

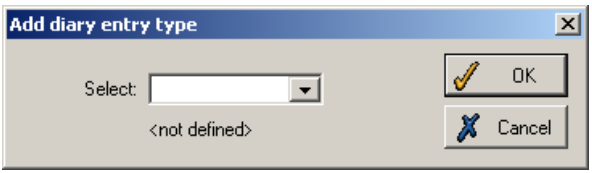
This gives the current date. Use the @ symbol before the date to specify that you want something at a specific date (e.g. @**01.04.2006**).

19.4 Set up automatic diary entries

To create a new automatic diary definition, select **Maintain diary definitions** from the **Diary** menu. This form contains all diary definitions already set up on the system:

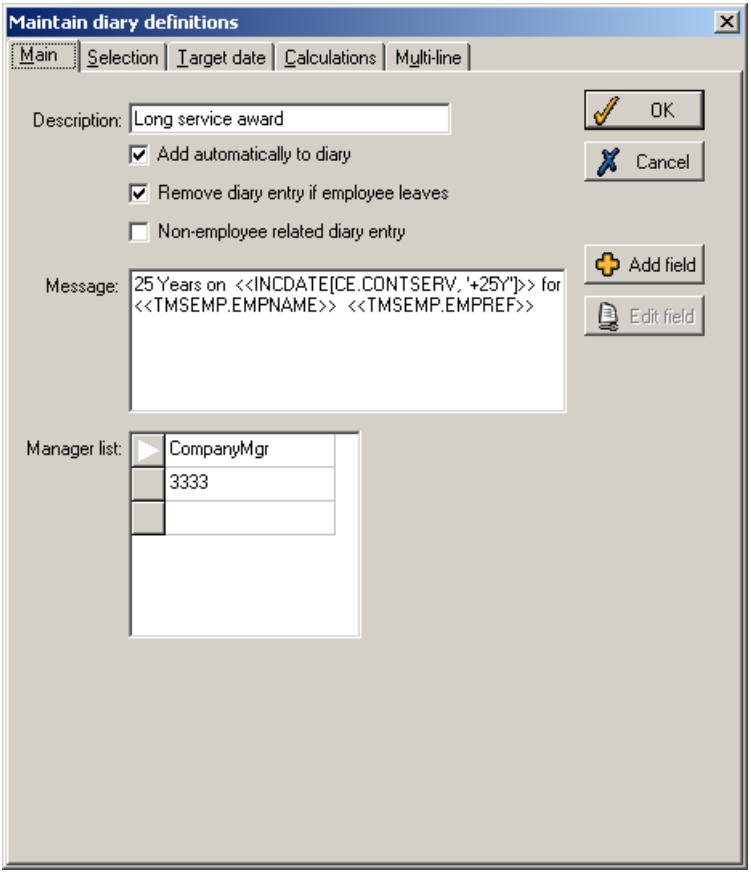


To add a new definition, click **Add**. This form is displayed:



Enter a unique name for the diary definition. It is sometimes useful to standardise the codes - e.g., you may want to prefix all pay review reminders with PR, and all Long Term Service reminders with LS.

Click **OK** to produce a form this form, which first displays the **Main** panel:



Enter a brief **Description** of what the message type is.

Tick the **Add automatically to diary** box (otherwise the reminder/message will not be automatically displayed in the relevant diaries).

Decide whether to tick **Remove diary entry if employee leaves**. You will usually want to do this, unless, for example, it is a diary entry about employees retiring. If you tick this option and the employee that the entry is related to leaves, the entry will be automatically removed, as long as it is still a future entry.

Message

NOTE: Before you enter the message, be aware that, if you wish to use a field from a multi-line table, you must first select the multi-line table to use, or else the system will not recognise any field from the multi-line table. See **Multi-line diary entries**, page 231.

The **Message** can be made up of text (e.g., **25 Years on**) and field names (which must be enclosed in two angle-brackets), like the fields and functions in the example on page 227:

<<INCDATE[CE.CONTSERV, '+25Y']>>

<<TMSEMP.EMPNAME>>

<<TMSEMP.EMPREF>>

If you do not know the field name, click the **Add field** button to open the expression builder (this will be familiar to you if you have used the Report Writer - see Report Writer manual for details). Here you will need to select the table the field belongs to, and then select the field itself from the list. Any functions or operators can be added to the field name here as well.

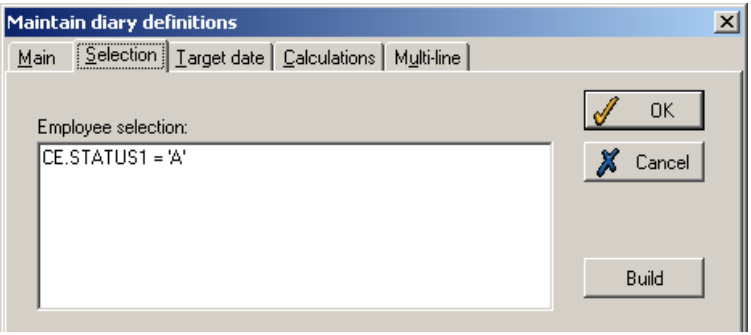
Manager list

The diary entry may only be relevant to certain people, so you must select the diaries in which the entry will be displayed. To do this, click in the **Manager list** box, which allows you to bring up a drop-down list, from which you can select the relevant managers.

You may select one or more managers (including yourself if appropriate) and you can also select from the organisation managers such as Company Manager (CompanyMgr) and Department Manager (DepartmentMgr).

19.5 Select the employees (who the diary entry refers to)

Once you have entered the message that will appear in the diary, and selected the managers who will receive the message, you must select the employees to whom the diary entry refers. This is done by opening the **Selection** panel, which looks like this:



If you need the entry to apply to all employees you can simply leave the **Employee selection** box blank. Otherwise, as discussed above, you will need to specify the selection criteria. You can either type this in directly or click on the **Build** button to help build your selection expression.

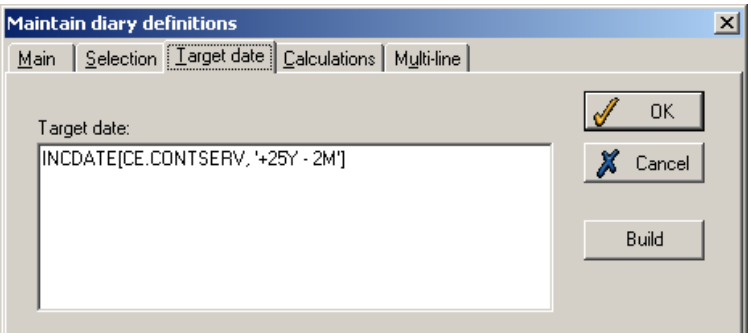
In the above example, the expression specifies that the diary entry will apply to all employees whose employee status is 'A' - actual. This effectively refers to all current employees.

For more details on using this panel, see the **Selection** section of Appendix 3, on page 306.

19.6 Target date

The target date is the date when the diary entry will be displayed. This is not necessarily the date of the event referred to in the message (e.g., it might be a week before a birthday, or four weeks before a leaving date).

Click on the **Target date** tab to display the following:



Use the functions **INCDATE**, **NEXTANNIV** or @ (see **Frequently used diary functions**, page 225, for details).

In this example, the reminder will appear two months before the employee's long service award will be due.

If you want to be reminded on the next anniversary of the employee's start date, type:

NEXTANNIV[CE.CONTSERV]

If you want any message appearing on a set day, simply enter something like this:

@01.02.2006

(or whatever the required target date is).

19.7 Non-employee related diary entries

The majority of automatic diary entries show information about employees. However, if you need to generate an automatic diary entry that is not related to employees on the system, make sure that you tick the **Non-employee related diary entry** box on the **Main** panel of the **Maintain diary definitions** form (see page 227).

For example, if department managers need to be reminded a week in advance that staff reviews must be completed by 31 March, then:

- tick the **Non-employee related diary entry** box;

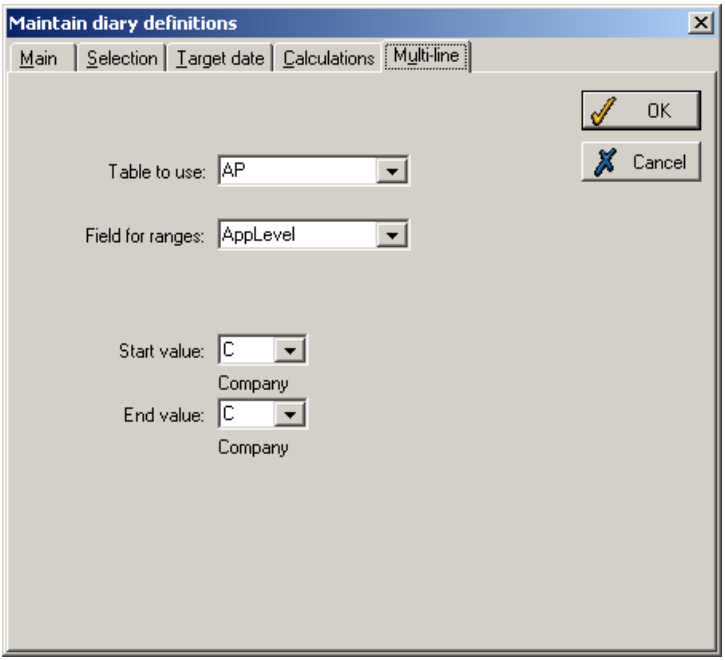
- on the **Target date** panel, enter **NEXTANNIV[@31.3.2006, -1W]** (the year here is not important, provided that the date is in the past);
- in the **Message** field of the **Main** panel, type something like 'Staff reviews must be completed by 31st March'.

If a diary type is non-employee related, then the **Selection** expression refers to the managers on the list and not to the employees.

19.8 Multi-line diary entries

If you wish your diary definition to make reference to one of the multi-line tables such as **Training and Qualifications**, **Event records** or **Inventory details**, you should set up the definition in a slightly different way.

Before you enter the message, selection criteria or target date, you must select the multi-line table you are going to use. Do this by clicking the **Multi-line** tab to open a form like this:



Select the multi-line **Table to use** (note that your diary definition can only use fields from this one multi-line table). In this example, a diary definition is being set up to show when an appraisal has not been completed. This requires fields from the **Appraisal details** table.

If you wish to limit the possible values, select a **Field for ranges** (in this case **Appraisal Level**), and the **Start value** and **End value** within this field for ranges (in this case, only appraisals at **Company** level are included in the range).

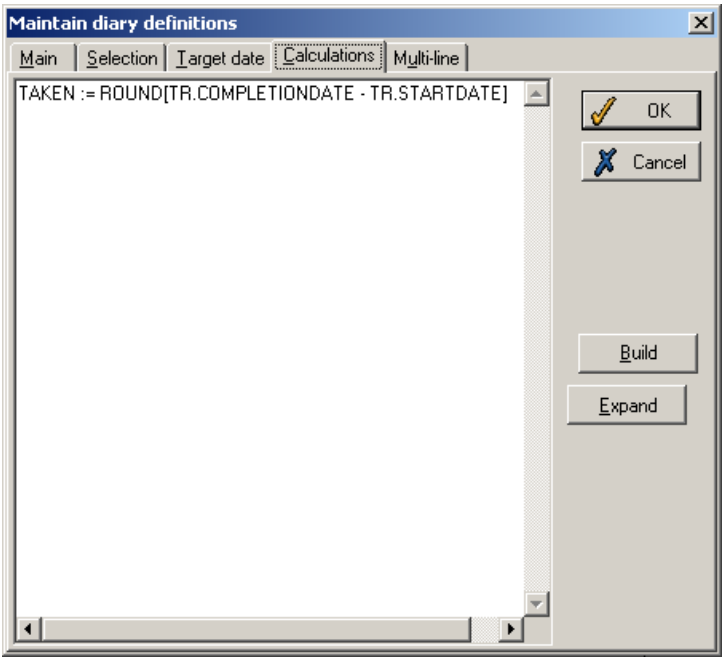
You can now use fields from this multi-line table in the Message, the Selection, the Target date and Calculations. In this example, switch to the **Main** panel and follow the instructions as for entering a definition from a non multi-line table. You will see the selected multi-line table in the **Expression builder** whenever it is opened.

19.9 Calculations

The calculation option is designed to support more advanced needs, involving more complex expressions, and is not required for basic diary definitions.

An example of this is a diary entry that informs a manager that a certain training qualification, e.g. **TR001** (Fork Lift Truck Certificate), has been awarded. If the manager wanted to know how long it took the employee to achieve the certification, the diary definition would have to include a calculation.

To do this, open the **Calculations** panel:



(Before this calculation can be entered, the **Training details** table must have been selected as the **Table to use** on the **Multi-line** panel, or else the fields from this table will not be recognised by the system. On the same panel, you should also select **Detail** as the **Field for ranges**, and then **TR001** as both the **Start value** and the **End value**).

This calculation is entered:

TAKEN := ROUND[TR.COMPLETIONDATE - TR.STARTDATE]

(The **ROUND** function treats the result as a whole number rather than as a date.)

Now click on the **Main** tab. In the **Message** field, enter:

Employee <<EMPNAME>> received Fork Lift Truck certificate. This was <<TAKEN>> days after the start date.

Click on the **Selection** tab. Then enter:

TR.COMPLETIONDATE > 0

For further information on calculations, see the **Calculations** section of Appendix 3, on page 308. Calculations for diary definitions work similarly to those for reports, full details of which can be found in Chapter 6 of the Report Writer manual.

CHAPTER 20

SET UP LETTER TEMPLATES

20 Set Up Letter Templates

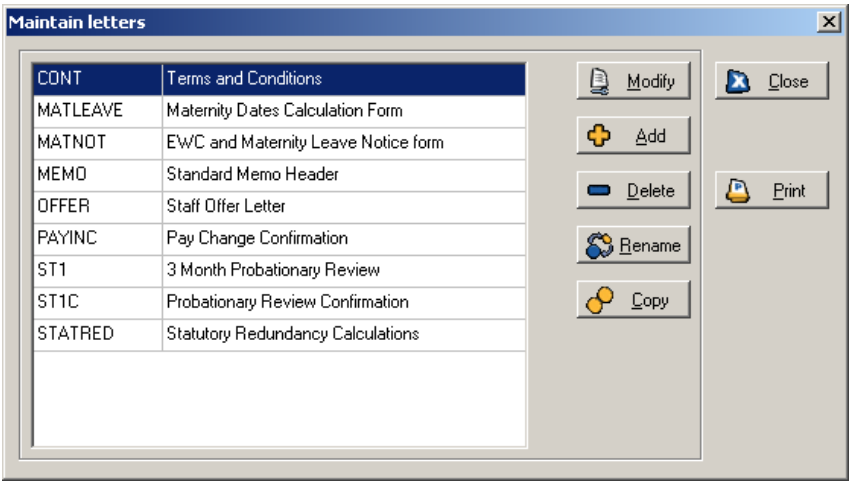
HR Manager's letter feature is a combination of the reporting function and a simple word processor: like the reporting function you can insert field names and calculations so that the letter displays specific information taken from your employee database; like a word processor you can format the letter to your requirements (using character and paragraph formatting etc.) and can preview exactly how the letter will be printed.

Users of the system can generate letters by accessing previously defined letter templates, and selecting the employees to whom the letters will be sent (for details of this, see Chapter 9, **Generate Letters**). Access to the letter templates function is often reserved for the system administrator.

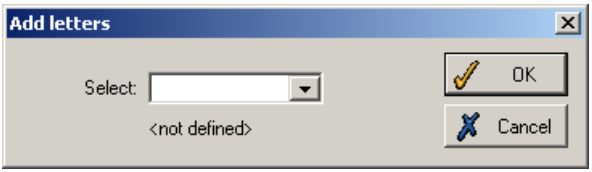
Letter templates can be as simple or as complicated as required. For a more complicated layout, you may prefer to create it in Microsoft Word®, and then copy and paste it into the template. You can also import in RTF format.

20.1 Add a letter template

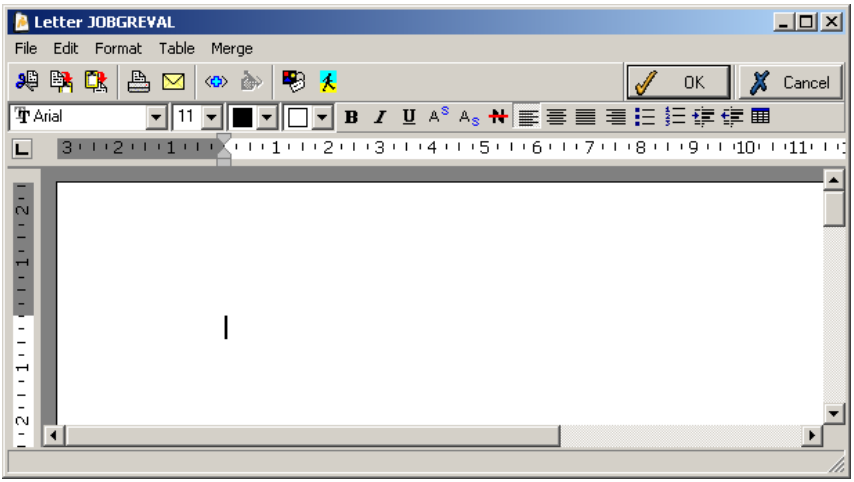
To add a new letter template, select **Templates** from the **Letters** menu. This table will be displayed, containing all letter templates that have previously been set up on your system:



To create a new template, click the **Add** button and this form is displayed:



Enter a unique name that will enable you to identify the template you are creating, and then click **OK** to produce a blank letter template:



This screen contains many of the options you would find in your usual word processing package, e.g., options to change the font size, emphasis and alignment. Other features are specific to this program.

20.2 Create the letter

To create the letter, type in the text and, wherever the information is to be drawn from the database, insert field names inside double angle-brackets. If you don't know the field name, you can click on the **Insert fields** button to use the expression builder.

20.2.1 Insert fields

When you create a template you can perform a mail merge - this requires you to add certain fields to tell the system what information you want to be displayed at particular points (employee's name, address etc).

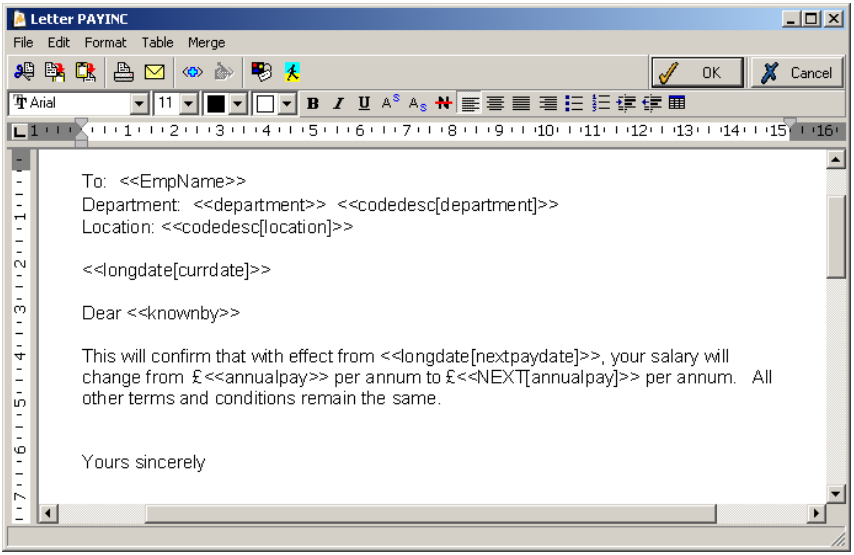
Of course, you can type a letter and print it out without inserting fields, but this requires entering names, addresses etc. manually, instead of having the system enter the details automatically.

The simplest way to insert a field is to type the field name into the appropriate place on the template. For example, where you wish the letter to display the first line of the address type in **<<ADDR1>>**. When the letter is generated, the first line of the employee's address will be displayed at this point.

Please note that all fields must be enclosed in these double angle-brackets:

<< field name >>

A letter template for a pay change confirmation looks similar to this:



When generated, all the fields will show the appropriate information instead of the field names.

For a list of standard fields, see **Appendix 1 - System fields and functions**, page 289.

It saves time if you can remember the names of the fields you require most frequently (ADDR1, EMPNAME, etc.). However, if you do not know the name of the field you require, open the expression builder by clicking this icon:

Note that, to modify a field that is already included in the template, click within the field and then click this icon:

This opens the expression builder, which will be familiar to you if you have used the Report Writer - see the Report Writer manual for full details.

20.2.2 Insert page break

If you wish to insert a page break at any point in the template, select **Insert page break** from the **Edit** menu on the template toolbar.

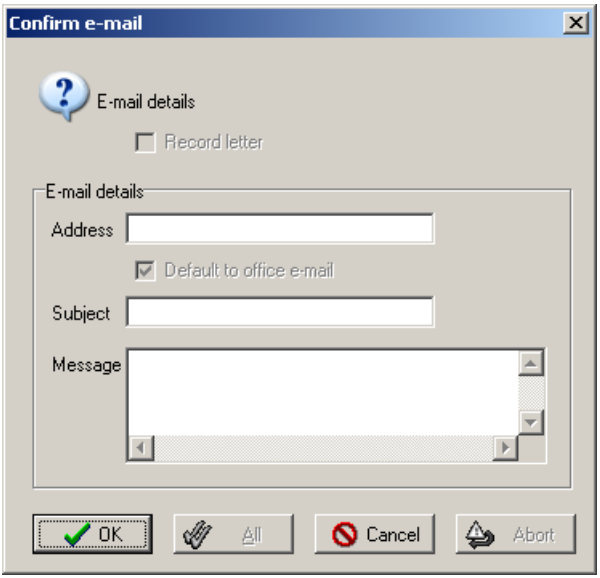
20.2.3 Format paragraph/character

You can change the format of the paragraphs or font used in the template using the respective options on the **Format** menu. If you have used word processing software before you should be familiar with the effects of changing any of these features.

20.2.4 Email a letter template

You may wish to email a completed template to a colleague, possibly for comments or assessment. To do this, click this icon:

This form appears:

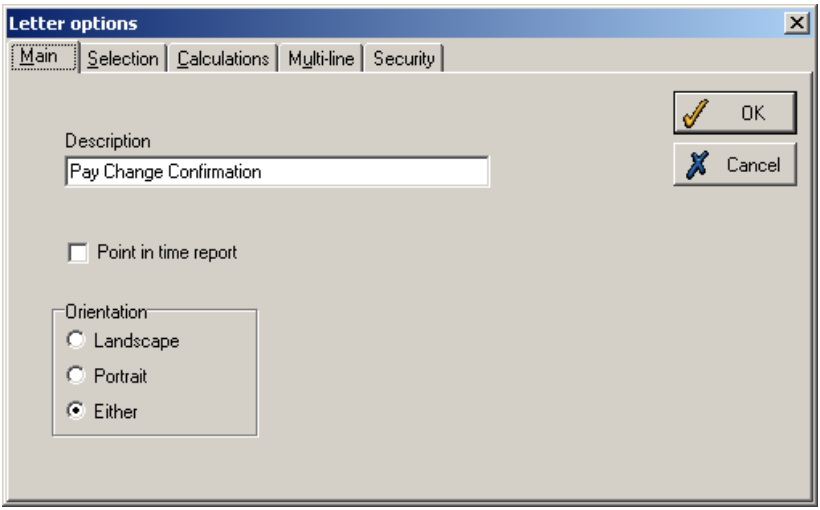


Enter the recipient's email Address in the box. Enter a Subject for the email, and if required you can add an accompanying **Message**.

20.3 Letter properties

When you have written the content of the template, there are a number of properties which you should set. To define the letter properties, click this icon:

The **Letter options** form appears, showing first of all the **Main** panel:



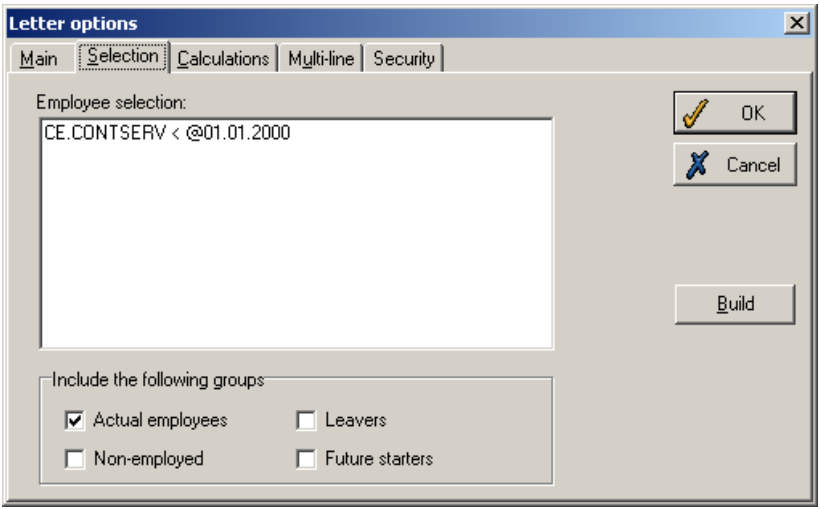
On this panel, enter a **Description** of the letter.

You can also specify whether or not it is to be a point-in-time letter. To do so, tick the **Point in time report** box. You will then have to enter the effective point-in-time date, when you come to generate the letter.

The **Orientation** of the letter can be specified, if necessary. Note that if **Either** is selected, the letter will be printed in the default orientation for the printer.

20.4 Employee selection

It is important to specify which employees the letter template should be sent to. To do this, open the **Selection** panel:



First, decide which employee types are to be included in the selection, using the tick-boxes at the bottom of the panel. In this example, only actual, current employees are to be included.

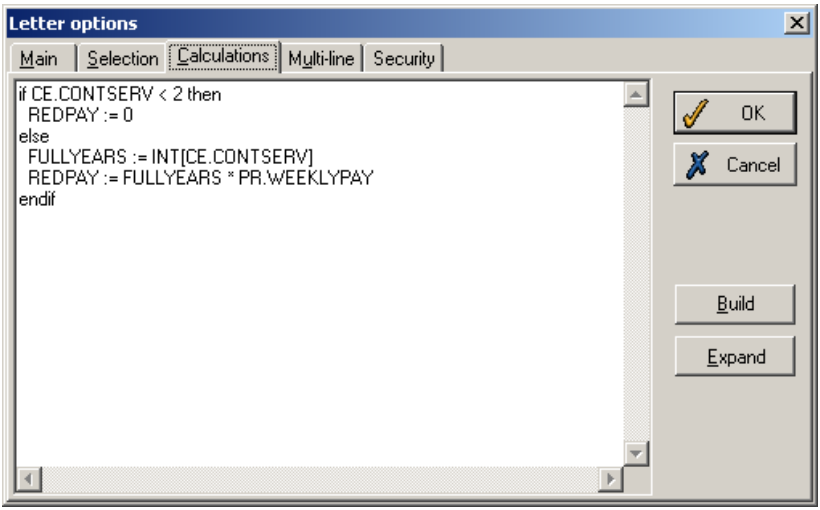
More detailed selection criteria can be specified in the **Employee selection** box. In the above example, the letter will only be printed for people who were employed before January 2000. Another example might be a letter that is relevant to any employees in a particular job grade.

NOTE: When a letter is printed for a single employee (by selecting **Single letter** from the **Letters** menu), it will only print for the selected employee if the employee fits within the selection expression given on this panel. Similarly, when printing for a range of employees (from the **Print Letters** option of the **Letters** menu), the **Select range** form is used to specify the employees to print the letter for. Any selection expression entered on the above panel will only apply to employees within the range selected upon printing the letters. If you wish to print the letter for all employees who meet the selection criteria given above, make sure that **All** is the range on the **Select range** form.

For more details on using this panel, see the **Selection** section of Appendix 3, on page 306.

20.5 Calculations

If you need to make complex calculations in your letter, click the **Calculations** tab:



The example above calculates redundancy pay. It states that an employee is entitled to no redundancy pay if he or she has less than two years' continuous service and that employees who have more than two years' continuous service are entitled to one week's pay for every complete year of service.

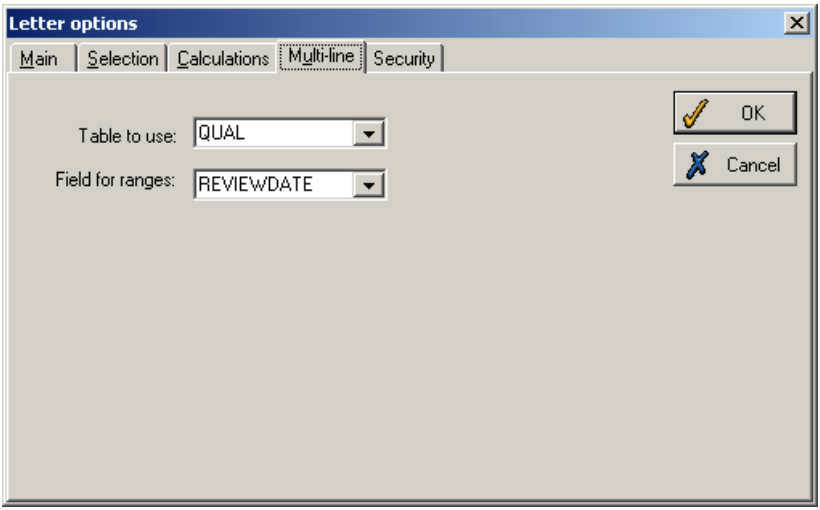
Now that the field REDPAY has been defined, you will want to include the calculated value in the letter - remember that it must be enclosed by double angle-brackets:

<<REDPAY>>

For further information on calculations, see the **Calculations** section of Appendix 3, on page 308. Calculations for letter templates work similarly to those for reports, full details of which can be found in Chapter 6 of the Report Writer manual

20.6 Multi-line fields

Fields from multi-line tables can be included in your letter. Click the **Multi-line** tab to display this panel:



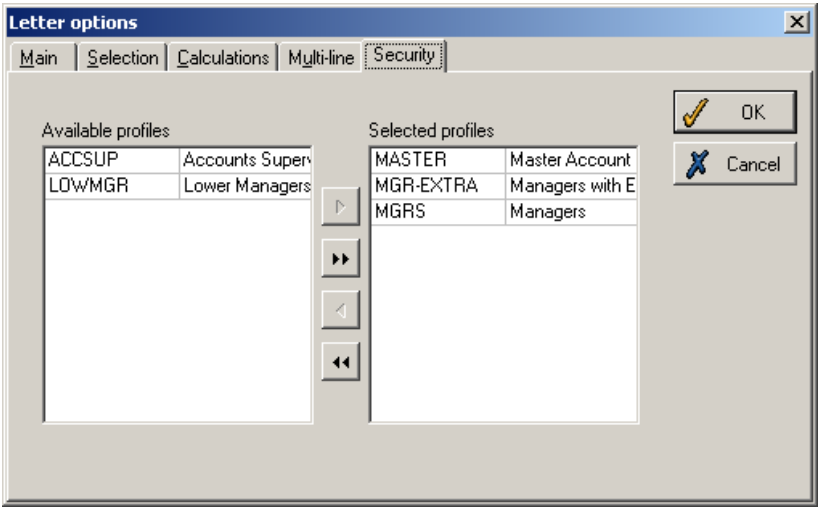
This works in a similar way to the multi-line feature when creating diary definitions and reports. You must select the multi-line **Table to use** (fields from only one multi-line table can be included). In this instance, the **Qualification details** table has been selected.

Then select the **Field for ranges** - this limits the values that can be included in the letter. In this case, REVIEWDATE is the field used, so, when the letter is produced, you will have to select a start date and an end date, within which the qualification review date must fall for a letter to be generated for that employee.

Once you have selected the required multi-line table, fields from this table can be added to the content of the letter itself, and can be used in the selection expression and a calculation. The multi-line table selected on this panel will now be included whenever the expression builder is opened.

20.7 Security

Click the **Security** tab to open this panel:



Use the arrows to select which user profiles have access to the letter (see **Select available items**, page 39, for details). Letter security can also be changed for individual profiles from the **Letters rights** section of **Maintain user profiles** (see page 199).

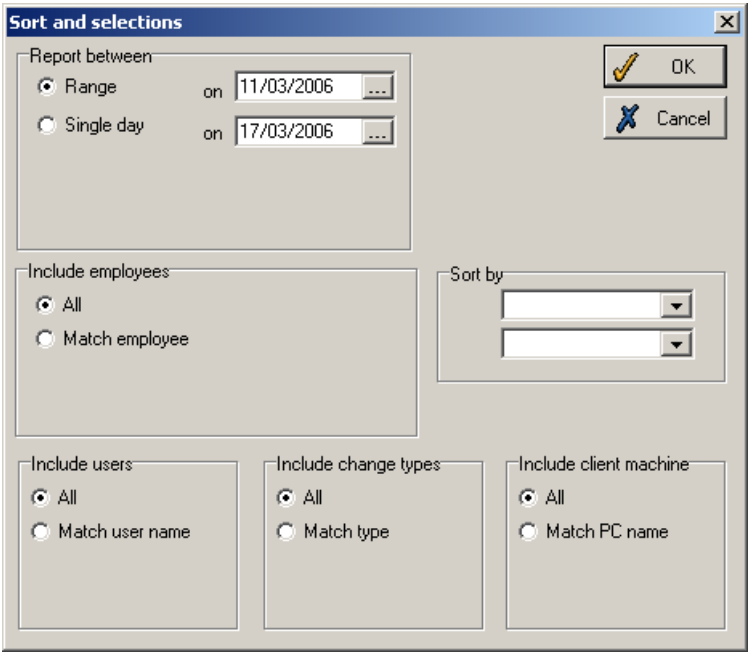
CHAPTER 21

AUDIT TRAIL

21 Audit Trail

The audit trail is a record of all the changes made on any of the Mitrefinch programs on your system. It records what changes were made and by whom. The audit trail also records all occasions when somebody logged into or out of any of the Mitrefinch programs.

To view the audit trail, select **Audit trail** from the **Launch** menu. This screen appears, which is used to filter the records displayed on the audit trail, making it easier to find the information you need:



To display all recent changes on the system, click **OK**. To filter the records so as to show only the information you need, change the default values in any of these sections of the form:

Report between

In this top section, choose the date range to display the audit trail for. By default, the date range will be the last week. If you need to change this, use the two calendar buttons. Alternatively, click the **Single day** option and you will then be able to specify which individual day to view, and the start and end times within that day.

Include employees

If **All** is selected, audit entries for all employees will be displayed. If the **Match employee** box is selected, you must then select an individual employee. Only changes made to the records of this employee will then be displayed in the audit trail.

If **Match employee** is selected, and no employee is chosen, only those audit entries that do not relate to employees are displayed (e.g., code changes and logins/logouts).

Sort by

This is the order in which the audit records are displayed. The records can be sorted by the date of the change, the type of change, the PC name on which the change was made, or another option. There are two boxes in this section, so two sort levels can be nominated.

Include users

By default, changes made by **All** users are shown on the audit trail. If you select **Match user name**, you can choose to see just the changes made by one user, whose name should then be selected from the drop-down list.

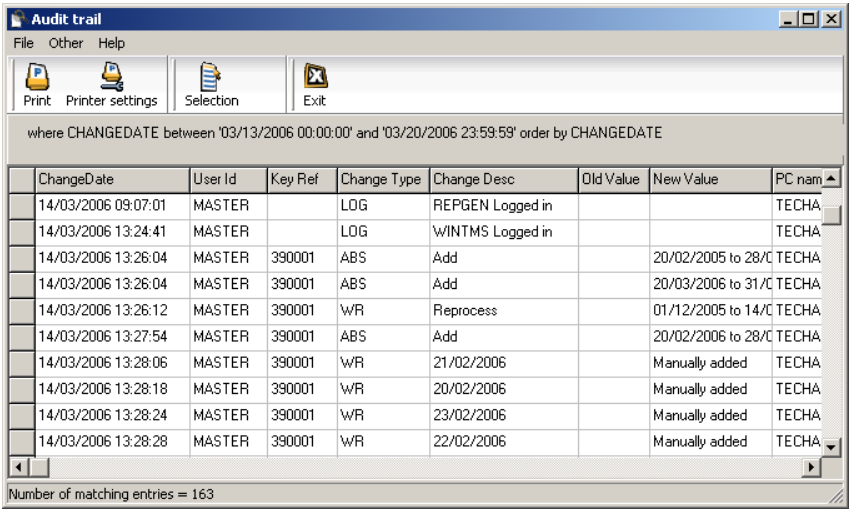
Include change types

You can choose whether to include **All** types of change in the audit trail, or click **Match type** and select just one type from the drop-down list which appears. The types of change that occur in your system depend on what Mitrefinch programs are licensed.

Include client machine

Again, the default is for the audit trail to include changes made on **All** client machines, but you can select **Match PC name** if you only wish to see the changes made on one particular PC. Then select the required PC from the drop-down list.

When you have chosen what to include, click **OK** to open the audit trail, which displays in the form of a spreadsheet:



ChangeDate	User Id	Key Ref	Change Type	Change Desc	Old Value	New Value	PC nam
14/03/2006 09:07:01	MASTER		LOG	REPGEN Logged in			TECHA
14/03/2006 13:24:41	MASTER		LOG	WINTMS Logged in			TECHA
14/03/2006 13:26:04	MASTER	390001	ABS	Add		20/02/2005 to 28/0	TECHA
14/03/2006 13:26:04	MASTER	390001	ABS	Add		20/03/2006 to 31/0	TECHA
14/03/2006 13:26:12	MASTER	390001	WR	Reprocess		01/12/2005 to 14/0	TECHA
14/03/2006 13:27:54	MASTER	390001	ABS	Add		20/02/2006 to 28/0	TECHA
14/03/2006 13:28:06	MASTER	390001	WR	21/02/2006		Manually added	TECHA
14/03/2006 13:28:18	MASTER	390001	WR	20/02/2006		Manually added	TECHA
14/03/2006 13:28:24	MASTER	390001	WR	23/02/2006		Manually added	TECHA
14/03/2006 13:28:28	MASTER	390001	WR	22/02/2006		Manually added	TECHA

The columns show the same information as is explained above, with these additions:

Key Ref - for changes to employee fields, this shows the employee's reference number. For other types of change, this will be blank.

Change Desc - a brief description of the change that was made, or the action that was performed.

Old Value - if a field, code or other value has been changed, this is the old value.

New Value - this is the new value of any field or code that has been changed.

CHAPTER 22

CUSTOMISATION

22 Customisation

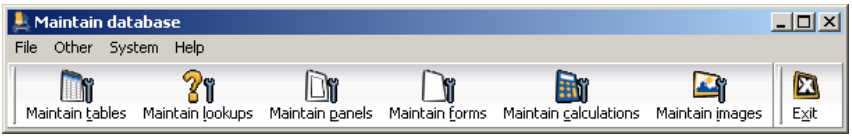
The way Mitrefinch HR Manager looks and operates can be customised to suit your organisation. For example:

- The database structure can be changed. Extra fields and tables can be added as required by your company.
- The properties of fields can be altered. For instance, the length of a field can be changed or a field can be made mandatory.
- Extra drop down lists can be added to restrict the values a field can take.
- The layout of panels can be altered with fields being deleted or added and extra panels being added as required.
- Extra forms can be added or accessed via a button on the forms toolbar.
- Calculations can be performed within fields every time Autotask runs.

The tables, lookups, panels, forms and field calculations collectively form what is known as the HR Manager package definition. The tables, lookups, forms and field calculations as they are found in the standard HR Manager system supplied by Mitrefinch are known collectively as the Standard HR Manager Package definition. Tables found in the Standard HR Manager Package definition are known as Standard Tables, the forms as Standard Forms, and so on.

To customise HR Manager , run the **dbdef.exe** program (**Database definition**). This can be opened by clicking this icon:

A valid username and password must be entered before you can enter the application. The main form of the program looks like this:



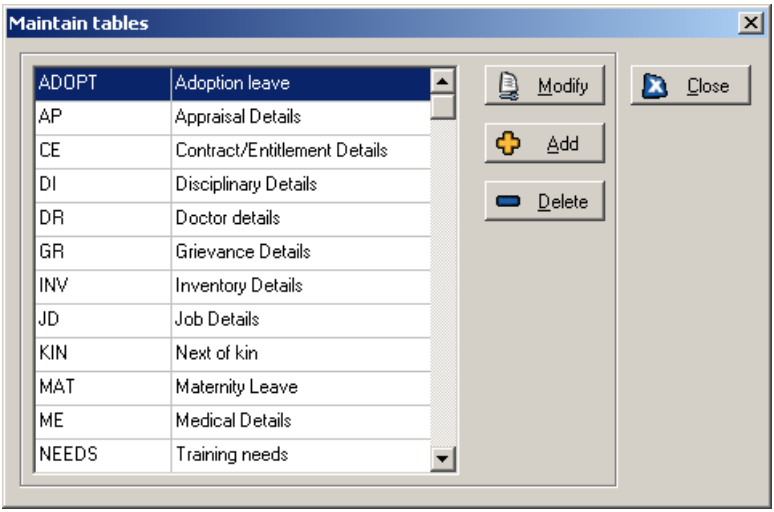
The six icons show the main features of your system that can be changed.

22.1 Fields

The procedure for adding a field depends on the type of field you are entering. If the field requires a drop-down list, you can either add it to an existing lookup, or you can create a new lookup to use for the field.
You must also decide whether it will be added to an existing table, or whether you must first create a new table for the field to belong to.

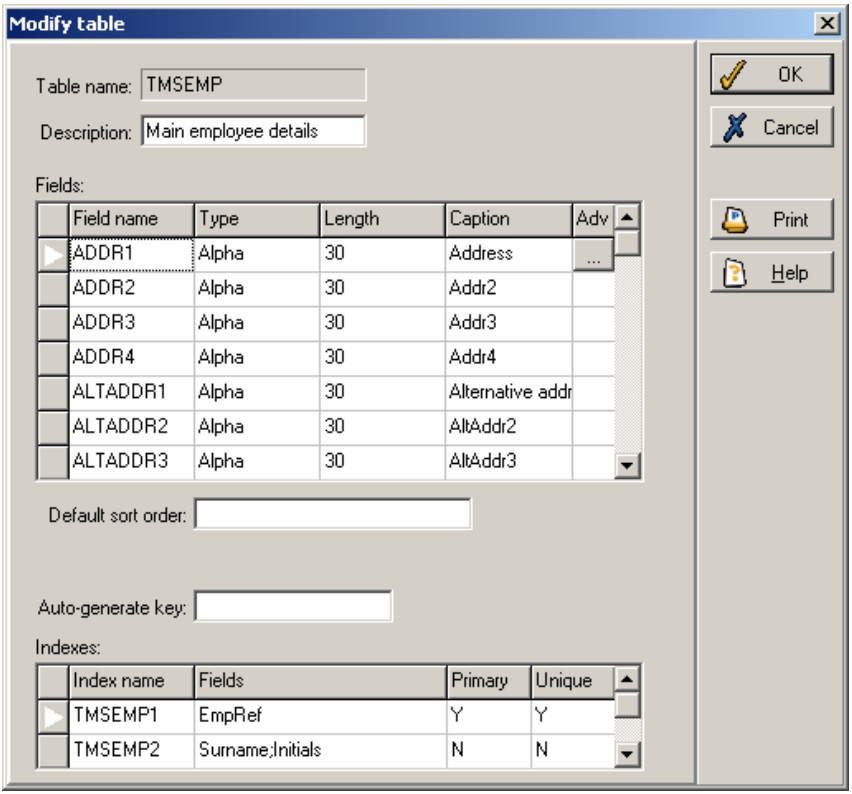
22.1.1 Add new fields

Within **Database definition**, click the **Maintain tables** icon. This form is displayed:



Select the table to which you wish to add the new field.

Click **Modify**, to produce this screen:



The **Fields** box contains all current fields belonging to the selected table. To add a new field, scroll down to the bottom of the list and enter information in the four columns.

Field name

The new field name you enter must be unique (i.e., not used by any of the other fields).

Type

This is the type of data that will be stored in this field. The types available are **Alpha** (alphanumeric field); **Date**; **Integer** (a real number with no decimal point); **Number** (a real number); **Restricted alpha** (allows letters, numbers and '_' (underscore) but no other symbols); **String list** (a text field with no limit to the number of characters in it); **Time** (no limit to the number of hours); and **Time of day** (limited to 24 hours).

Length

This is the maximum length (in characters) for a value in the field. It will determine the length of the field's edit box. It is important to note that the length of the field must be the same or longer than the code length of any drop-down list to which it is linked.

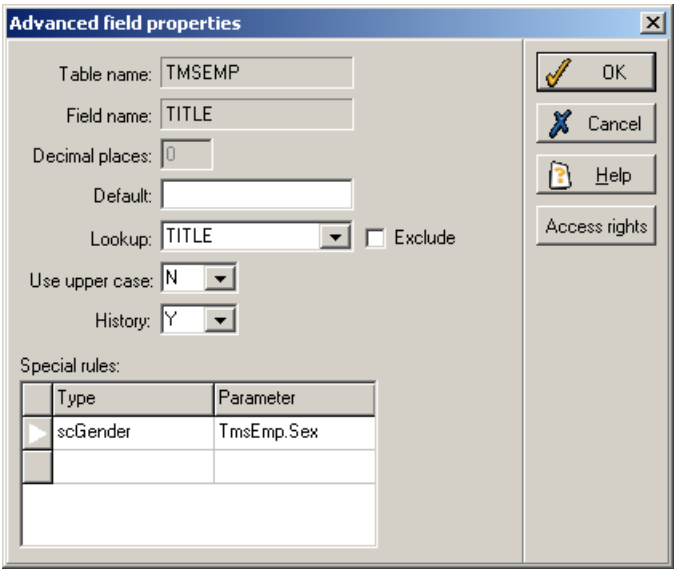
Caption

Enter an appropriate **Caption** (this will be applied to the field on screen).

The main details of the field are now complete, so you are now able to click **OK** and save the new field. However, should you need to, you can define more advanced field properties.

22.1.2 Advanced field properties

To set the advanced properties of the field, click the button in the **Adv** column, which opens this form:



Decimal places

This is only enabled when the field type is set as **Number**.

Default

This allows you to enter a default value for the field, but is only useful if all or the majority of employees will have the same value in the field. For instance, if the majority of employees work the same amount of weekly hours, you would enter that amount as the default. You would only then need to change this field for employees with a different value.

Lookup

If the field is controlled by a drop down list, you should enter the name of the drop down list in the **Lookup** field. Click on the arrow and select the appropriate lookup from all those in your system. If you require a new drop-down list, you can create one (see **Add a lookup** on page 265).

Use upper case

To change all characters to upper case, select **Y** in this box.

History

If you require historical information for a non multi-line field to be retained, select **Y** in the **History** box. For example, PR.PAYVALUE is a history field because every time the pay value changes, a record of the date of change and of the previous value is retained. Fields such as date of birth would not require a history, as any changes would simply be correcting a mistake. Multi-line fields such as kin details or training details cannot be history fields.

Special rules

A field can have one or more **Special rules** attached to it. These tell the system to carry out special actions which depend on the value in the field. A special rule always contains a special check and can sometimes also include a parameter. For a list of the special checks and parameters and an explanation of their functions, see **Special checks**, page 292.

A typical example of when special rules are used is in the case of a history field which, when changed, changes the date in the associated **From** field on the same panel (e.g., when **OD.DEPARTMENT** is updated, the field **OD.DEPARTMENTDATE** is updated to show the date of the change). This is done by using the special check **scSetStartDate** and the parameter **OD.DEPARTMENTDATE**.

If you wish to add a new field like this, you will need to create two new fields - one showing the detail that is updated, and the other the date that is updated. E.g., if you are creating a field for an employee's shift pattern, and another showing the date the employee started on the shift pattern, you might add fields called **SHIFTPATTERN** and **SHIFTPATTERNDATE**. In the **Advanced field properties** for the **SHIFTPATTERN** field, the special rules type would be **scSetStartDate** and the parameter the date field (**SHIFTPATTERNDATE**).

The **SHIFTPATTERNDATE** field will then update each time the **SHIFTPATTERN** field is changed, so you can see when the last change occurred. (If you are updating in point-in-time mode, the date field will be the effective date of change rather than the current date.)

Access rights

Click the **Access rights** button to open a form which allows you to select the user profiles that will be given access to the field. For each profile that is given access, you can also tick the **Read only** box if you wish to prevent users on this profile from editing the field. These access rights can also be set from the **Field rights** section of **Maintain user profiles** (see page 197).

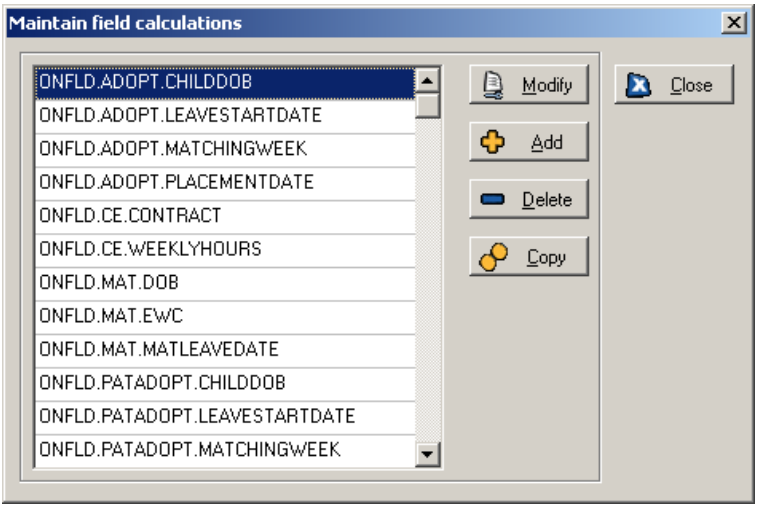
22.1.3 Field calculations

You can set up calculations that assign the value of one field depending on the value of another field. These calculations take place when the value of one field is changed by a user. They may also be set to take place whenever Autotask is run (see **Autotask**, page 283).

For example:

If you wanted to classify anyone working fewer than 20 hours a week as part time (CE.STATUS3 = 'P'), you would set up a calculation to check and, if necessary, change the field STATUS3 every time the CE.WEEKLYHOURS field was altered.

To add this field calculation, click the **Calculations** icon on the main **Database definition** form. This table appears, containing all field calculations previously set up on your system:



Note that only user-defined field calculations can be deleted, and not standard ones. A standard calculation can, however, be modified so that it no longer functions if it is not required.

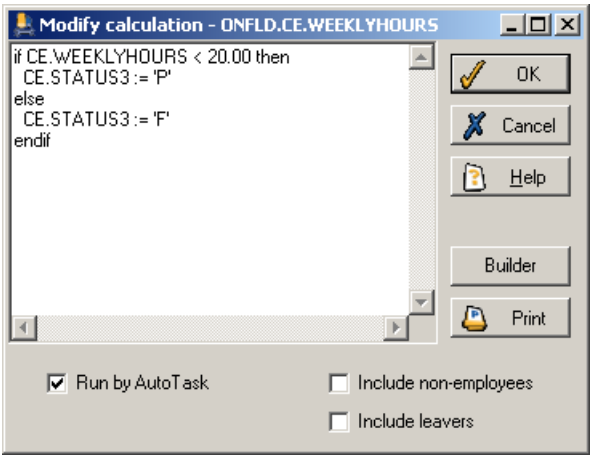
To add a new field calculation, click **Add**, and you can then enter the name of the new calculation. Because field calculations are triggered when a single field is altered by the user, the name given to the calculation must be in this format:

ONFLD.Prefix.FieldName

So, for a calculation that is to be performed each time the weekly hours are changed, the name would be:

ONFLD.CE.WEEKLYHOURS

Once you have entered a valid name, the **Modify calculation** form is displayed:



Enter your field calculation on this form. If required, click the **Builder** button to open the expression builder, which can make it easier to create a calculation.

The calculation consists of **if...then...else** statements and assignment statements. (For more details on calculations, see the **Calculations** section of Appendix 3, page 308.)

NOTE: All fields to be modified must be in the same table as the field in the field calculation name (in the above example, all fields modified are in the **Contract and entitlements** table, as is the name).

The calculation is always carried out when a user changes the value of the field included in the field calculation name (although the change must have been entered by a user - if the change is itself the result of a field calculation or a mass change, the field calculation will not be performed).

If the **Run by AutoTask** box is ticked, the calculation will also be carried out when AutoTask runs.

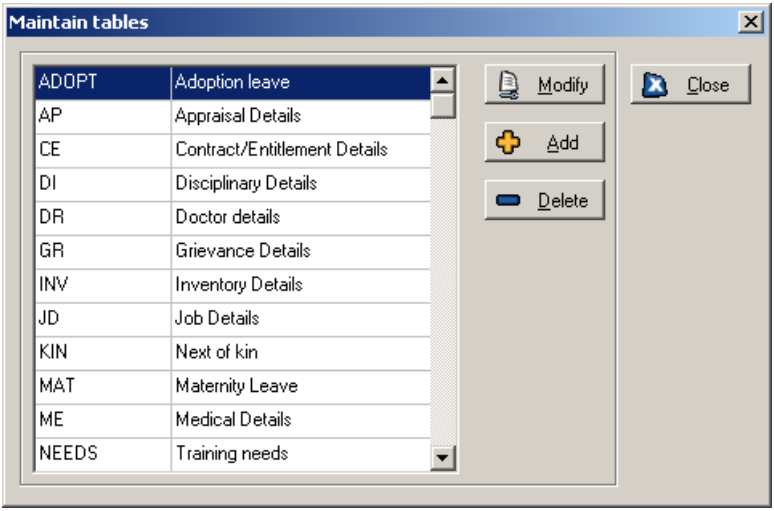
There are two further tick-boxes, which can be ticked if you wish to **Include non-employees** and **Include leavers** in the calculation.

Click **OK** to save the details of the field calculation, which will now be shown in the **Maintain field calculations** list.

22.2 Tables

A table is a group of related fields. For example, the **Main employee details** table contains the personal details fields such as Surname and Title, and the **Organisation details** table contains fields like Department and Location.

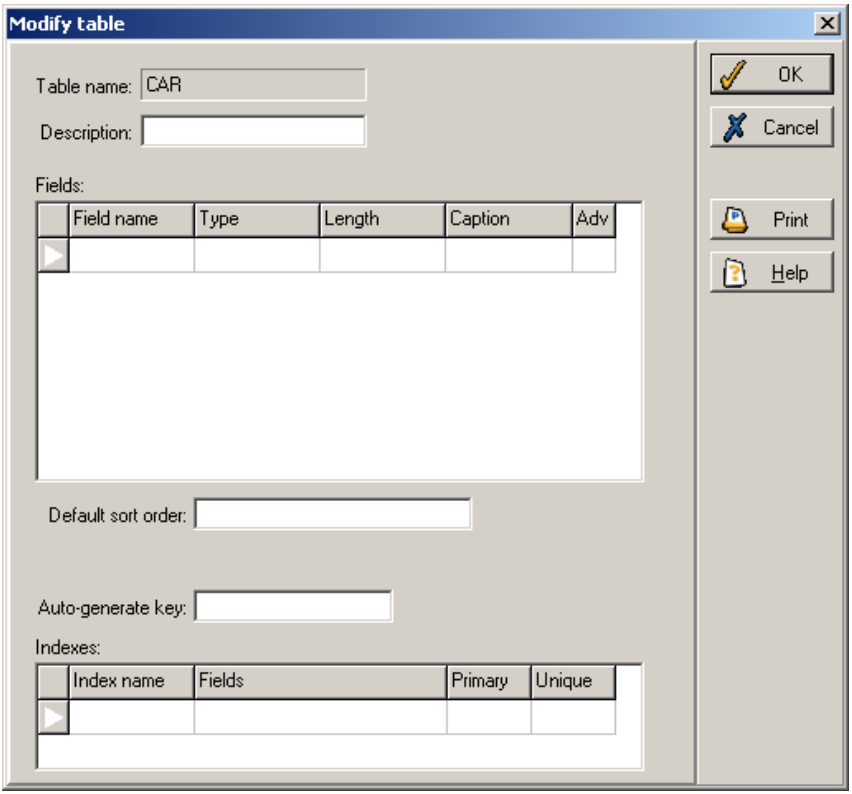
Click the **Tables** icon to display the **Maintain Tables** form:



This screen lists all tables which can be customised. (Some tables used internally by HR Manager cannot be modified and are therefore not listed here.) To modify a listed table, click **Modify**. To delete listed tables, click the **Delete** button (note that only tables that have been added by your company can be deleted, and not standard tables (i.e. tables that are part of the standard package definition)). To create a new table, click **Add**.

22.2.1 Add a table

Click the **Add** button, and then enter a unique name for the table in the box that appears. Click **OK** to open this form:



First, enter a suitable **Description** for the table.

In the **Fields** grid, there is one field that every table must have - EMPREF. Enter it with these details:

Field name	Type	Length	Caption
EMPREF	Alpha	10	EmpRef

If you are creating a multi-line table, this field must also be entered:

Field Name	Type	Length	Caption
AUTOKEY	Number	0	Autokey

On the first line of the **Indexes** grid at the bottom of the form, enter:

Index Name	Fields	Primary	Unique
	EmpRef	Y	Y

Or, if this is to be a multi-line table, enter:

Index Name	Fields	Primary	Unique
	EmpRef; Autokey	Y	Y

Click the **OK** button to save the table.

Once the table has been saved, you can now modify the following details of the table.

22.2.2 Modify table

Click **Modify** to bring up the **Modify table** form (see page 262). This is used to enter all the fields you wish to include on the table, as well as defining some other features of the table.

Fields

The **Fields** grid contains all the fields that belong to the table. Any fields that are 'greyed out' are disabled so cannot be changed. Fields which have a white background are 'free entry', which means you can type information into them. For details on entering new fields into a table, and on what is meant by the various properties of each field, see **Add new fields**, page 253.

Default sort order

When records from the database are read into a list by HR Manager, they are normally ordered in the list in the order of the first of the **Indexes** listed at the bottom of the screen (which will normally be EMPREF, meaning the records are sorted by employee reference number). If this order needs to be changed the new order can be entered in this box as a list of field names separated by commas or semicolons. If a field is to be listed in reverse order its name should be preceded by **DESC**.

Indexes

Indexes are used for the quick retrieval of information from a database table. For instance, in the **Main employee details** table an employee might commonly be searched for by reference number or by surname, therefore this table has been given two indexes, one consisting of the unique reference number and one consisting of the surname and initials. The grid on which the indexes are entered consists of these columns:

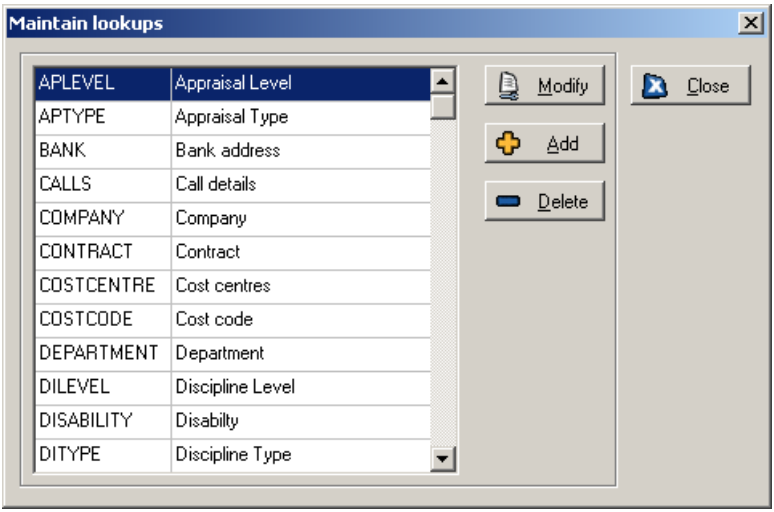
- **Index name** - This must be unique, although one index name can be blank. The name can be up to 30 characters in length.

- **Fields** - Enter the names of the fields that make up the index, separated by semicolons or commas.

- **Primary** - Only one of the indexes in a table can be a primary index. A primary index must not have any duplicate records in its fields. For instance, in the table TMSEMP the primary index consists of the field EMPREF, so the table can only contain one record for any value of EMPREF. However, an index which consists of SURNAME would not be primary, as more than one person can have the same surname.

22.3 Lookups (Drop-down lists)

Click the **Maintain lookups** icon on the main toolbar of **Database definition** to open this form:

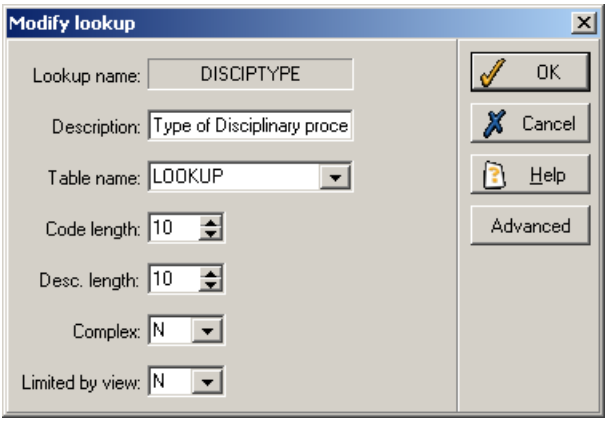


This table contains all the lookups (also known as drop-down lists) that can be customised in your system. The lookups can be linked to fields to control the values that any field can take.

To modify a lookup, click the **Modify** button to display the **Modify lookup** form (see page 266). Note that standard lookups can have some basic properties modified, but they can't be deleted, nor can their advanced properties be modified. Lookups which you have added can be deleted and all their properties can be modified. To add a new lookup, click **Add**.

22.3.1 Add a lookup

To create a new lookup, click the **Add** button on the **Maintain lookups** screen. A dialogue box will appear, in which you should enter a new unique name for the lookup. Click **OK** to open this form:



This contains all the basic properties of the lookup. All the fields with a white background can be modified. Any fields that remain 'greyed out', in this case **Lookup name**, cannot be altered.

- **Description** - The description is associated with the lookup on the **Maintain codes** screen in WinTMS and HR Manager.

- **Table name** - This is the name of the table in which codes belonging to the lookup are stored. This will normally be **LOOKUP**, but for organisation lookups it is **LUORG** and, in exceptional circumstances, it can be the name of other tables.

- **Code length** - This is the maximum length of a code the lookup can take. It must be kept in sync with the length of any fields that use the lookup. If you increase the code length without ensuring that all fields using the lookup are of the same or a greater length, the code will not be read by the system.

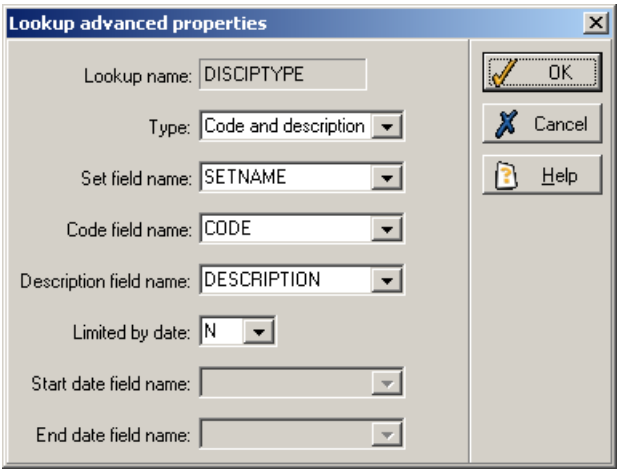
- **Desc. Length** - This denotes the maximum length that the description of a code belonging to a lookup can take. The description can appear next to a field using the lookup on a panel if desired.

- **Complex** - If set to **Y**, this means that the values a field using the lookup can take are limited by or can limit the values of other fields using complex lookups.

- **Limited by view** - This should be set to **Y** for any lookups whose options will be limited by employee views or user views (see **Views**, page 209, for details).

If the lookup is user-defined (i.e. if you have added the lookup to the standard selection), an **Advanced** button will be visible. Clicking on this opens the **Lookup advanced properties** form. If you are modifying a standard lookup, you are not able to access the advanced properties of the lookup.

22.3.2 Lookup advanced properties



This form allows you to enter the following information:

- **Type** - The drop-down list allows you to choose either **Code and description**, which means each lookup code has an associated description, or **Description only**, in which the code and the description are the same (e.g., the standard lookup **TITLE**).

- **Set field name** - This is the name of the field containing the lookup name in the table that stores the codes for the lookup (usually **LOOKUP**). The **Set field name** must be **SETNAME**. Any other options should only be used in consultation with Mitrefinch Support.

- **Code field name** - This is the name of the field which contains the codes, in the table that stores the codes for the lookup. The name must be **CODE**. Any other options are only to be used in consultation with Mitrefinch Support.

- **Description field name** - This is the name of the field containing the code description, in the table that stores the codes for the lookup. The name must be **DESCRIPTION**. Again, any other field names are only to be used in consultation with Mitrefinch Support.

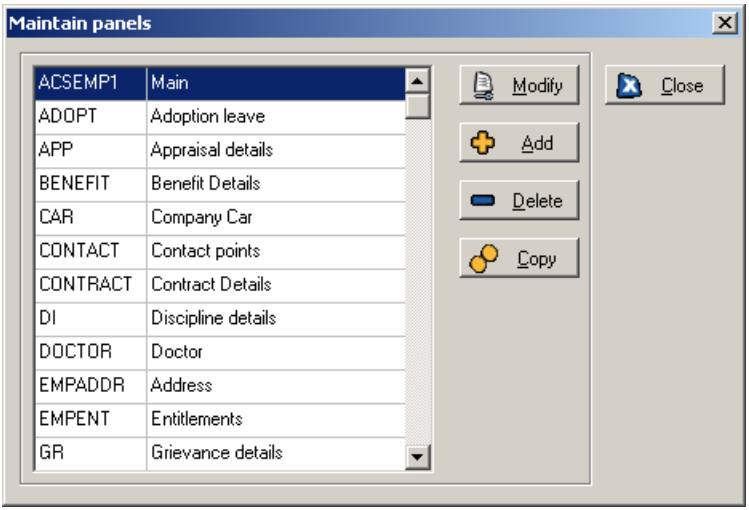
- **Limited by date** - This should usually be set to **No**. Only set it to **Yes** in consultation with Mitrefinch Support. This limits the date range in which the lookup can be used, and allows you to select the date range using the two fields below, which become enabled.

Click **OK** to save the advanced properties.

22.4 Panels

Panels are like single pages of information. You only look at one panel at a time but they can be grouped together in Forms, where you can click on tabs to switch to different panels. So, for example, the Contract and Entitlements form on the standard system has three panels - Contract details, Benefit details and Leaver details. Each contains distinct information, but the three all relate to the same broad area of the system, so are grouped together.

Clicking the **Maintain panels** icon in **Database definition** brings up the following screen:



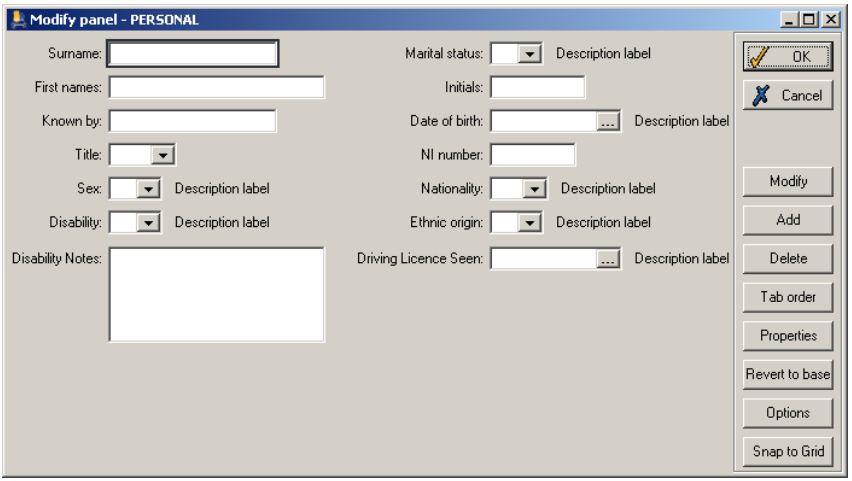
The table contains all panels used to edit and display employee information. Note that although all panels can be modified, you cannot delete any standard panels, or any user-defined panels that are part of a form. Only user-defined panels that are not used on any form in the system can be deleted.

22.4.1 Add a panel

To add a new panel, click the **Add** button and enter a name for the panel. Then decide whether the panel will be **Free format** or **Grid-style**. The latter are used to show multi-line information (see **Grid-style panels**, page 275). Most panels will be free format. When you select this, you will see a blank version of the **Modify panel** form (see page 270). You then need to set the properties of the panel, and add fields.

22.4.2 Modify panel

If you need to make any changes to an existing panel, select it and then click on the **Modify** button to display a screen like this (a blank version of this screen is shown when you add a new panel):



This screen shows the panel as it will appear on HR Manager and WinTMS. It allows the layout of a panel to be modified. You can add and delete fields, and change the arrangement of the fields, as well as the position of any field labels and descriptions.

(For details on adding fields to the panel, see **Add a field to a panel**, page 271.)

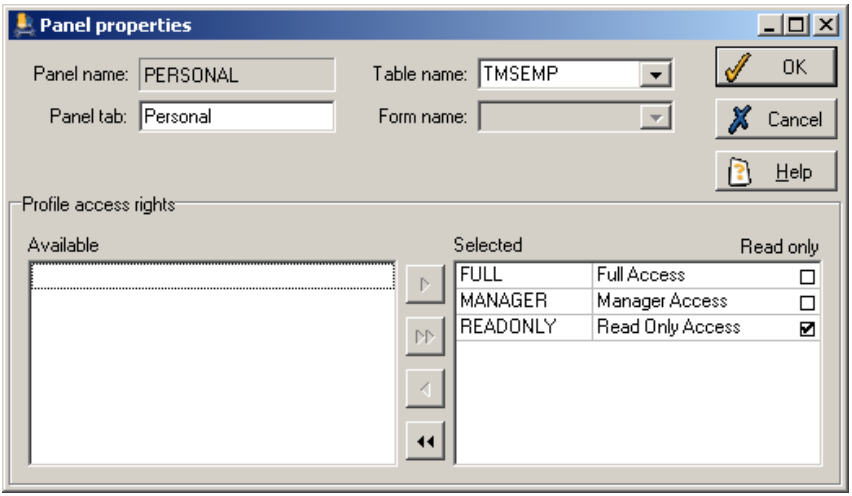
An existing field can be changed by clicking the **Modify** button. This opens the **Field properties** box, which can be amended in the same way as for adding a new field.

Note that fields can be deleted from a panel, even if they contain data. To do so, select the field you wish to delete, and then click the **Delete** button. Should you ever need to put the field back, any data in it will have been retained.

If you wish to reverse any changes which have been made to the panel, you can do so by clicking the **Revert to base** button. This will return the panel to its original definition (undoing all changes made by users for your organisation). Before this takes place, you will have to confirm the action when prompted.

22.4.3 Panel properties

Clicking on the **Properties** button produces this screen:



The **Table name** drop-down list is used to select the table which relates to the panel. Note that fields from other tables can be included on the panel, but only fields from the selected table can be edited on the panel. Any fields from other tables will be read-only.

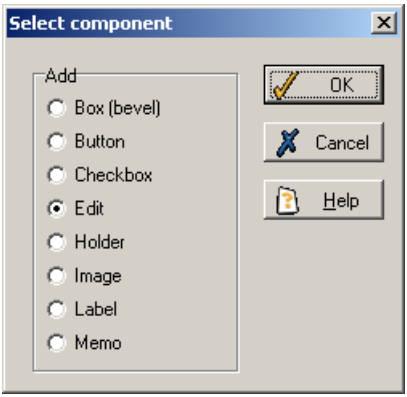
The **Panel tab** is the text that appears on the tab used to access the panel, and should make it clear what information is stored.

The **Form name** box is only enabled for grid-style panels (see **Grid-style panels**, page 275), for which the name of the form must be entered. This refers to the form which will be shown when a row on the grid is double-clicked to show further details of the record and allow the record details to be edited.

In the **Profile access rights** section, you can select which user profiles have access to the panel, and can specify whether that access is to be read-only for any profiles. Note that this information can be changed from within HR Manager, using the **Maintain user profiles** feature (see page 196).

22.4.4 Add a field to a panel

Click the **Add** button. This box appears, allowing you to choose the type of component you wish to add:



- **Box (bevel)** - this adds a box outline, which can be used to separate different parts of the panel.

- **Button** - add a new button to the panel. If you choose this, you will have to enter an action in the **Field properties** form, which is the result of clicking on the button.

- **Checkbox** - add a new checkbox to the panel.

- **Edit** - this is an ordinary field, which may be one you have just created. It may also be a field from another table which you want to display on this screen in read-only mode.

- **Holder** - a read-only field used to display calculated information. In general, this should only be set up by Mitrefinch.

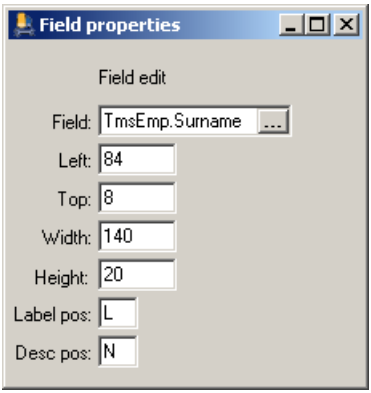
- **Image** - a field in which you can put a picture.

- **Label** - allows you to create a label box. For example, differentiate between different parts of the panel by using labels.

- **Memo** - is used if you wish to set up a memo.

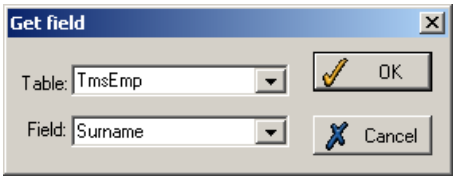
Whichever type you select, the new blank field will appear on the top left corner of the panel. Click on it and then drag it to approximately where you would like it to be.

Then click **Modify** to open the **Field properties** box for the component:



Enter the following information (some boxes will have default values entered automatically):

- **Field** - this is the name of the field. To enter a new field, click the button to the right of the box, to open this form:



  First select the **Table** which contains the field, and then you will be able to select the required field from the **Field** list. You may select any table and any field from that table, but if you choose a table which is not the table name associated with this panel (as defined on the **Panel properties** form - see page 270), the information will be read-only. For example, you may want to show the **Job title** field on the **Pay details** panel. You can do this, but the information cannot be edited.

- **Left** - Position from the left of the panel. Use this to align the field precisely under or above another.

- **Top** - Position from the top of the panel. Again, this helps precise alignment.

- **Width** - If this is an **Edit** field you cannot change this, as it was determined when the field was set up. For **Memo** and **Label** fields, this can be adjusted to the width you require.

- **Height** - If this is an **Edit** or **Label** field you cannot change this. For a **Memo** field you can adjust it.

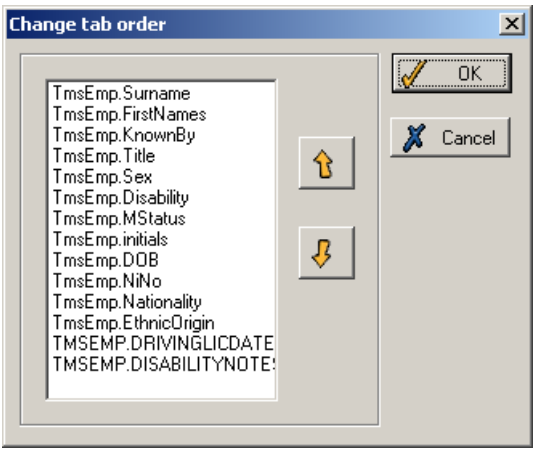
- **Label Pos** - Defines the position of any label for the field - set to **N** (None) **L** (Left of the field) or **T** (Top of the field).

- **Description Pos** - Set the position of the field description to **N** (None) **R** (Right) or **B** (Bottom).

When you make a change to any of these properties, click anywhere on the **Modify panel** form to see the change reflected on the panel display.

22.4.5 Tab order

Clicking on the **Tab order** button brings up a list of all fields on the panel, like this:



Fields are listed in the tab order, i.e., the order in which a field is selected by pressing the **Tab** key. This can be changed by highlighting a component and using the up and down arrows to move it to a new position, as required.

22.4.6 Snap to grid

To help align neatly the features on the panel, you can use the **Snap to grid** feature. Clicking the **Options** button brings up a form like this:

If you wish to activate the grid function, you must tick the **Snap to grid** tick-box. Then enter a **Grid size**. This is measured in pixels - enter any number between 1 and 20. This is the size of the hidden grid with which items are aligned.

In the above example, items must be spaced at distances of multiples of four pixels.

Note that the grid feature only applies when you are moving items manually (i.e., using the drag and drop method to move them to new locations on the form). If you are typing in the alignment on the **Field properties** form, you can still enter any alignment.

22.4.7 Grid-style panels

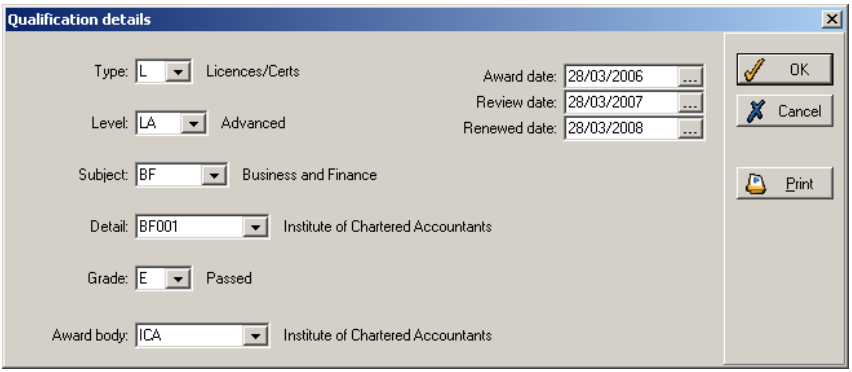
There are two types of grid-style panel: one has a **History** grid and the other a **Multi-line** grid.

A history grid is displayed when you right-click on a panel such as job details or pay details. It automatically stores all previous entries for fields. These grids are generated automatically when, in **Advanced field properties** (see page 255), a field is selected as a **History** field. No further action is required for these grids.

You will see a multi-line grid when you look at the **Training and Qualifications** or **Events** forms, for instance. Each line of a multi-line grid shows summary information relating to a non-grid panel. For example, a record on the **Qualification details** panel looks like this:

Award date	Type	Level	Subject	Detail
28/03/2006	Licences/Certs	Advanced	Business and Finance	Institute of Chartered A

If you wish to add a new record or modify an existing record, you will see this screen:



This is the base panel of which the multi-line panel is a summary.

22.4.8 Add a new grid-style panel

There are various situations in which you would require a multi-line grid. Typically these are when you need to hold many similar records - for example, many training course or medical records. These two examples are standard panels on HR Manager.

The standard system does not hold a health and safety panel so in this example we are going to add a multi-line Health and Safety panel to the **Events** form.

The multi-line panel will draw its information from several free format panels, each one detailing a health and safety event which needs to be recorded. So first you should create a new free format panel. The panel requires fields which will come from a Health and Safety table which you will have to create.

(Steps 1-3 are done in the manner explained in the Tables, Fields and Panels sections above.)

1. Create a new table called HS (see section **Add a table**, page 261).

2. After adding the EMPREF and AUTOKEY fields (required for multi-line tables), add any other fields that will be shown on the panel. If you are following the style of the pre-defined events panels, you will want to add STARTDATE, REVIEWDATE, COMPLETIONDATE, with HSTYPE and HSLEVEL linked to lookups from the **Events** drop-down list.

3. Now add a new panel in **Free format** called HS incorporating these fields with the **Table name** (in **Panel properties**) set to HS (see **Modify panel**, page 269).

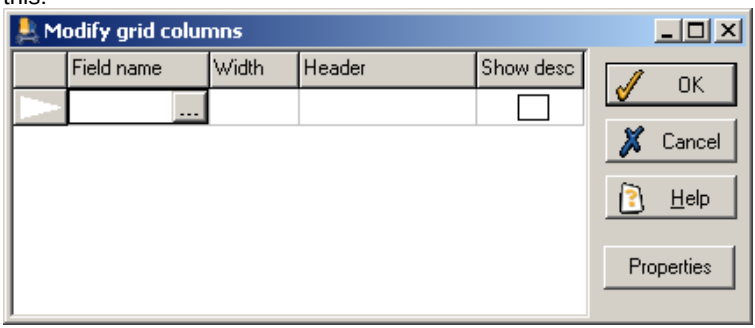
4. This panel needs to be added to a form - however, as this is not the grid-style panel that you need on the **Event records** form, you should create a new form, call it HS, and add the panel HS to it. Do this in the manner described on **Modify forms**, page 279.

5. You can now set up the grid-style panel. All grid-style panels should be prefixed with an X so that they are not confused with standard panels in any listings, so in this case it will be called XHS.

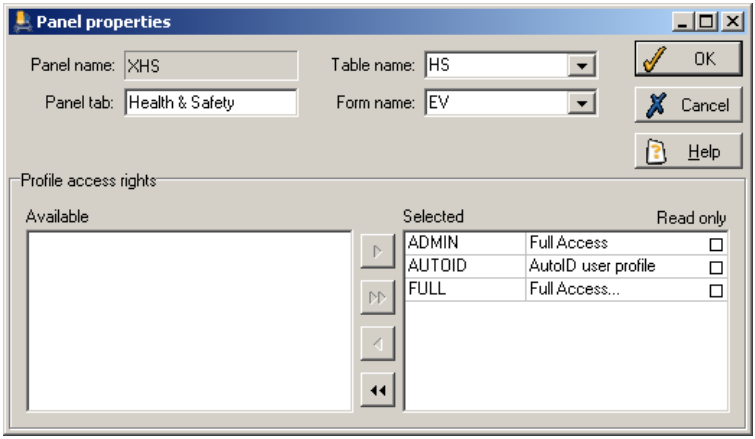
6. To do this, **Add** a new panel on the **Maintain panels** screen and call it XHS.

7. You will be asked to **Select panel style** - choose **Grid**.

8. You will now be presented with a grid-style screen like this:



9. Click the **Properties** button to produce this screen:



10. Enter in the **Panel tab** box the name you wish to appear on the tab.

11. Set the **Table name** to **HS**.

12. Set the **Form name** to **EV**, the **Event records** form.

13. Define the **access rights** of different user profiles to the panel.

14. Then click **OK** to return to the **Modify grid columns** screen.

15. Add all the fields you wish to see on the grid-style panel by clicking on the button in the field name column to select the **Field Name** from a drop down list. All fields must come from the **HS** table which you specified in the **Panel properties**.

16. For each of the fields, you must set a **Width** in characters, and enter a **Header** for the column.

17. If you have any coded fields, you can tick the **Show desc** box to show the description rather than the actual code.

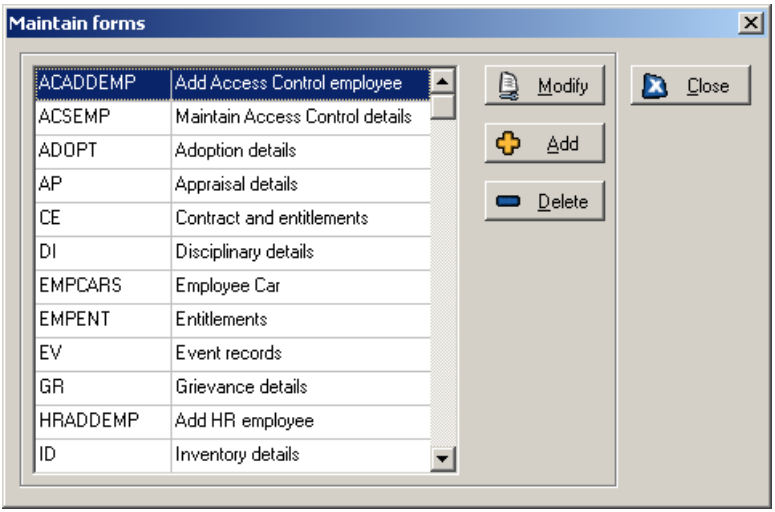
18. Click **OK**, and you must now add this grid-style panel to a form (in this case, **Event records**).

19. To do this, open **Maintain forms**, select the **Event records** form, and, in the **Panels** list, add the new XHS panel.

The new grid-style panel is now added to the **Event records** form, and can be used next time you open HR Manager.

22.5 Forms

Click the **Forms** icon on the main **Database definition** screen to produce a list of all forms currently on your system:

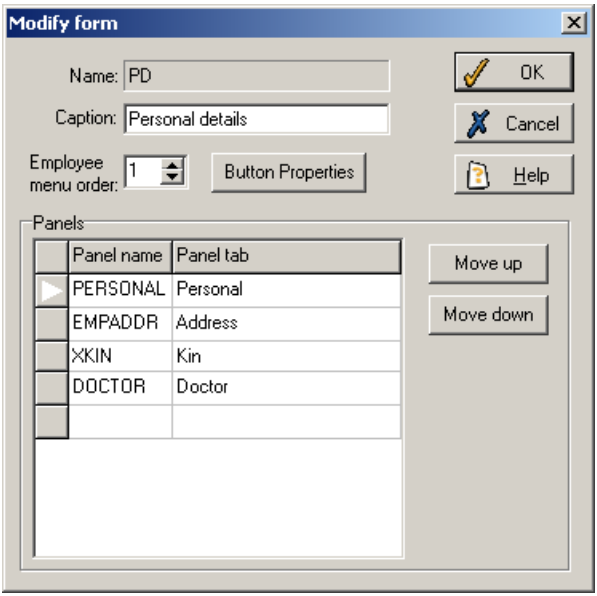


Standard forms (that come with the system) cannot be deleted. User-defined forms can be deleted, provided that they are not in use anywhere.

To add a new form, click the **Add** button and enter a name for the form, and a blank version of the **Modify form** screen will appear. This can be edited in the manner described for modifying existing forms.

22.5.1 Modify forms

Select the form in the **Maintain forms** list, and then click **Modify**. This screen appears:



The **Caption** is the heading shown when the form is displayed in HR Manager.

The **Employee menu order** box shows a number, which is the order in which this form will appear on the **Employee** menu in HR Manager, and the order in which the icon will appear on the toolbar. If this is set to '0', this form will not appear on the **Employee** menu or the toolbar at all.

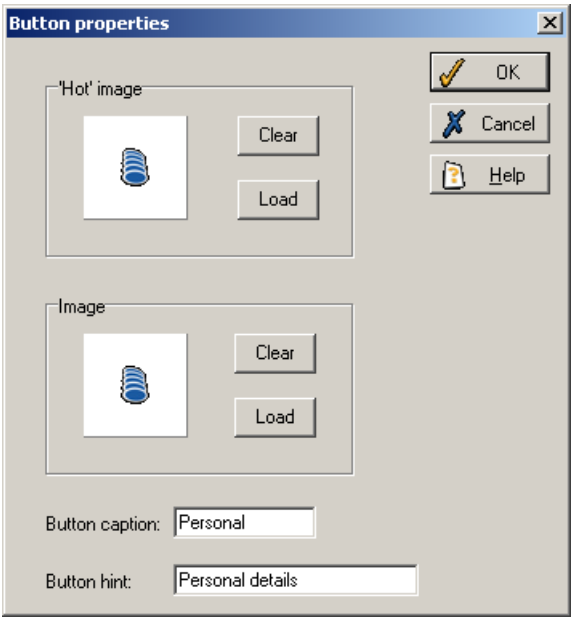
Panels

This lists all panels that belong to the form. Panels can be added and deleted by clicking in the grey column to the left of the list, and selecting either **Insert entry** or **Delete entry**. If you select **Insert entry**, a new line will appear in the grid. This line will have a drop-down list, which contains all panels on the system. Select the panel you require.

The order of the panels on the form (i.e., the order in which the tabs appear on the form) can be changed using the **Move up** and **Move down** buttons.

22.5.2 Button properties

Click the **Button properties** button to display a screen like this:



This screen allows you to select how the icon for this form will look on the toolbar of HR Manager. If the form does not appear on the toolbar, this screen should be blank and you should enter nothing on it.

- **Button caption** - This is the caption that will appear on the button underneath the icon if **Button captions** are enabled in **Local preferences**. You should keep this brief because the size of all the buttons is determined by the length of the longest button caption.

- **Button hint** - This is the message which appears as a hint when the mouse pointer is moved over the button. This message can be longer than the button caption, so can describe the function of the button in a little more detail.

- **'Hot' image** - This is the image that will appear on the button when the mouse is moved over the button. It is also the image that is always present on the button if the user's **Local preferences** have **Button icons** set to **Colour** (see **Interface**, page 134, for details). The 'Hot' image should be a 32x32 pixel bitmap. The transparent colour (i.e. the colour set to the same colour as the button face) will be the colour of the bottom left-hand pixel.

- **Image** - This is the image that is present on the button if the mouse pointer is not on top of the button or if the user does not have **Button icons** set to **Colour** on **Local preferences**. It can be the same as the **'Hot' image**, if desired.

To load a new image, click on the **Load** button. This allows you to browse to the location of the image you wish to load. To delete an image, click on the **Clear** button.

NOTE: a button will only appear on the toolbar if the form has both a **'Hot' image** and an **Image** set.

CHAPTER 23

AUTOTASK

23 Autotask

Autotask is the program which processes special calculations, future changes and diary entries. It can be scheduled to run overnight, every time Windows® is opened, or as and when you require. Autotask can also synchronise data in Mitrefinch TMS and Flexipay with the data in HR Manager, if your HR Manager system is linked to either or both of these packages. It will usually be set up during installation of your system, but you may need to change the way it runs.

23.1 Set Autotask to run automatically

The easiest way to ensure that Autotask runs every day is to add it to the Windows StartUp menu on a PC with access to HR Manager that is started every day. This will ensure it runs whenever this PC is switched on.

To do this:

1. On the Windows **Start** menu, go to **Settings**, and then select **Taskbar and Start Menu**.

2. Click the **Start Menu** tab at the top of the form.

3. Click the **Customize** button, and then **Add**.

4. Either enter the file path of Autotask, or click **Browse** and search for Autotask in the HR Manager directory.

5. Click **Next**, and then select **Startup** as the folder to place the shortcut in.

6. Type the name that Autotask will take on the **Startup** menu, and then click **Finish**. (You may also be asked to choose an icon for Autotask before you can click **Finish**.)

Autotask will now run in the background whenever this PC is switched on.

Autotask can also be run automatically, on an individual basis, by clicking the Autotask icon in the HR Manager folder:

The process will take place in the background.

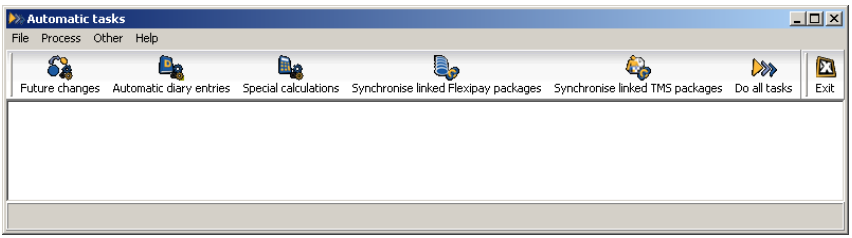
23.2 Run Autotask manually

When running Autotask manually, you can choose to run any of the tasks individually, or all the tasks together. You can also observe the process as it happens.

To run Autotask manually, first select **Run** from the Windows **Start** menu.

Then type the location of Autotask on your system, e.g., **c:\wintms\autotask.exe auto=n**. Your Autotask program may be in a different location (e.g., a different drive letter, or a different folder name). The **auto=n** part prevents Autotask from running automatically.

This form will be displayed when Autotask is opened manually:



The icons on this form allow you to choose which tasks you want to run (the same options are also accessible from the **Process** menu).

There are six options:

Future changes

This will update current information on the system with all future changes that were previously entered on the system with a date on or before today. For example, if an employee's salary is due to increase from £20,000 to £21,000 on 01/04/2006, then running **Future changes** on this date will process this change so that the new salary of £21,000 will become the current salary visible when the employee's pay details are viewed.

Automatic diary entries

This processes automatic diary entries. There are three main stages of this task:

1. Diary entries are tidied up (diary entries older than the time set to keep entries for in **System preferences** are deleted, as are all entries for managers who have left)

2. Employee related diary entries are processed.

3. Non-employee related diary entries are processed.

Special calculations

This will process all special calculations which have the property 'Run by Autotask' set. Any fields altered by the special calculations will be changed. For instance, a special calculation might be used to change an employee's holiday entitlement depending on length of service so that the holiday entitlement is always kept up to date.

Synchronise linked Flexipay packages

This updates the values of all fields in Mitrefinch Flexipay that are linked to HR Manager fields with the values in HR Manager. This occurs for all employees in HR Manager linked to Flexipay by having a valid Pay reference number. Note that it will not create an employee in Flexipay who does not already exist in that program.

This synchronisation will only take place if the link to Flexipay is currently active.

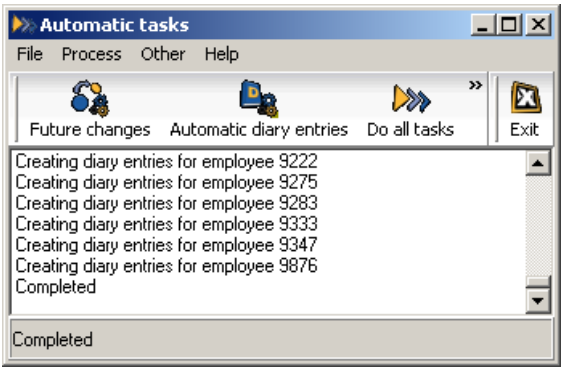
Synchronise linked TMS packages

As for Synchronise Flexipay but for Mitrefinch TMS, synchronising all employees who have a valid TMS reference number.

Do all tasks

This will process the above five tasks and also delete any audit entries older than the time set to keep entries for in **System preferences**.

When you select any of the above options, you will see the status of the task for each employee in turn, as Autotask checks through the records. The form will look like this:



APPENDIX 1

SYSTEM FIELDS AND FUNCTIONS

Appendix 1: System fields and functions

A1.1 Forms and their associated panels

The standard forms used by the system and the panels that belong to them are:

Form code	Form name	Panels
PD	Personal details	• Personal • Address • Kin • Doctor
CE	Contract and entitlements	• Contract details • Benefit details • Leaver details
JD	Job details	• Job
OD	Organisation details	• Organisation • Contract points
PR	Pay details	• Pay details 1 • Pay details 2

Form code	Form name	Panels
TQ	Training and qualifications	• Qualifications • Training details • Training needs
EV	Event records	• Appraisal details • Discipline details • Grievance details • Medical details • Notes
ID	Inventory details	• Inventory details
MAT	Maternity	• Maternity leave • Adoption leave • Paternity (birth) • Paternity (adoption)
SS	Summary information	This form must be created by your System Administrator. By default, it contains no information.

Form code	Form name	Panels
ADDEMP	New employee details	• Personal • Contract details • Job • Organisation • Pay details 1

Any of these forms may have different panels in your system, depending on the way HR Manager has been set up.

A1.2 Special checks

This list shows all special checks in HR Manager, explaining where they are used and describing their functions.

Special check	Description
scAge	This check is used by the field TMSEMP.DOB and sets the text of the description to be the length of time between the date in the field and today (or the point in time date if the view is a point in time view). It takes as a parameter **Age @Yy @Mm @Dd**, to give a description in this format: **'Age' + the age in years, months and days**. This check could also be used by other date fields to describe how long ago the date entered was.
scAlwaysAddHistory	If a field has this special rule then a history entry will be entered for it whenever any field in the table is updated, even if the field's value has not changed. (The field must also be a history field).

Special check	Description
scBank	This is used exclusively by the bank sort code field (PR.BANKSORTCODE). When the sort code is changed this special rule automatically updates the read-only bank name, address and telephone number fields on the **Pay Details 2** panel.
scCheckDate	This special check requires another date field as its parameter. It checks that the date entered is not earlier than the value of the other field passed in as the parameter.
scGender	This is used exclusively by the Title field (TMSEMP.TITLE). It automatically sets the sex field (TMSEMP.SEX) according to the value entered.
scInitials	This is used exclusively by the field TMSEMP.FIRSTNAMES. The field set up as the parameter (should be TMSEMP.INITIALS) will have its value set to the first characters in all first names entered that are separated by spaces. This special check also sets the value of the TMSEMP.KNOWNBY field to be the first of the first names if its current value is blank.
scLengthService	This special check is used exclusively by the field CE.STARTDATE. It sets the description for the field equal to the duration from the start date up until today or the leave date (if this is before today). It takes as a parameter **@Yy @Mm @Dd** to set the text of the description to the length of service in years, months and days.
scMandatory	This is used to make a field mandatory. If a field is entered it will not apply changes to a panel until the field has a value entered.

Special check	Description
scName	This is used by the fields TMSEMP.FIRSTNAMES and TMSEMP.SURNAME as well as various address fields. It ensures all characters in the name are in the correct case.
scNiNo	This is used by the field TMSEMP.NINO. It ensures that the National Insurance number entered is in the correct format.
scNone	This is the 'null' special check and doesn't do anything. It is listed here for completeness.
scPastDate	This check can be added to a date field and ensures the date entered is not in the future.
scPayGrade	This check is used exclusively by the field PR.PAYGRADE. It ensures the values of the read-only fields **Min pay**, **Mid pay** and **Max pay** on the panel **Pay details 1** are set correctly
sc.PayHours	This is used by the fields CE.ANNUALHOURS and CE.WEEKLYHOURS. If the value for either one of these fields is changed, the other is updated automatically.
scPayRef	This is used exclusively by the field TMSEMP.PAYREF. If HR Manager is linked to **Flexipay**, then, when a panel with this field on is saved, this check ensures the value entered is a valid **Flexipay** reference number and warns the user if the link to **Flexipay** is not set up correctly.

Special check	Description
scPayValue	This is used by the fields PR.PAYGRADE and PR.PAYVALUE. It ensures that when either of these fields are changed the read-only fields **Annual pay**, **Monthly pay**, **Weekly pay**, **Hourly pay** and, if applicable the fields **Annual FTE pay**, **Monthly FTE pay**, **Weekly FTE pay** and **Hourly FTE pay** contain the correct values.
scPicture	This can be used by the field TMSEMP.NINO. It takes as a parameter a series of the characters **A** and **N** (standing for alphabetic and numeric) and ensures that the data entered in this field corresponds to the correct pattern of alphabetic and numeric characters.
scSetKinAddr	This is used by the field KIN.ADDR1. It ensures the address fields for all kin default to the corresponding address fields of the employee.
scSetStartDate	This is used to set the default value of **'From date'** fields to either the employee's start date or else the Point In Time date in a PIT view. It is used by the field to which the 'From' date applies and takes the 'From date' field as a parameter.
scSpecCalc	If a field has this special check entered against it then, when a value is entered in the field, the system will run any special calculation with the name **ONFLD.fldname**.
scSpecCheck	This could be used by fields for NI No., Tax code and SCON number with a parameter of NiNumber, TaxCode and SCON respectively to check that the data entered is valid.

Special check	Description
scStartDate	This is used for various HR Manager date fields. It ensures a date can not be entered earlier than the continuous service date, CE.CONTSERV.
scTMSPkg	This is used by the TMSEMP.TMSPKG field.
scTMSRef	This is used exclusively by the field TMSEMP.TMSREF. If HR Manager is linked to TMS, then when a panel with this field on is saved this check ensures the value entered is a valid TMS badge number and warns the user if the link to TMS is not set up correctly.

APPENDIX 2

EXAMPLE DIARY DEFINITIONS

Appendix 2: Example diary definitions

The purpose of this appendix is to show you a selection of common diary definitions. For a detailed description of diary functions and definitions, see Chapter 19, **Set up diary definitions**, page 221.

All of these examples refer to demonstration data. They will not necessarily fit your data, but they should provide models to think about and modify.

Appraisal not done

Message <<CODEDESC[AP.MANAGER]>> has not completed appraisal for <<EMPNAME>>

Selection INCDATE[AP.APPDATE,'+1m'] < CURRDATE and AP.COMPLETIONDATE = 0

Target date INCDATE[AP.APPDATE,'+1m']

Multi-line Table to use: AP

Field for ranges: APPLEVEL (start and end values depend on settings)

Appraisal notes not received

Message <<CODEDESC[AP.MANAGER]>> has not returned appraisal notes for <<EMPNAME>>

Selection INCDATE[AP.APPDATE,'+4w'] < CURRDATE and AP.COMPLETIONDATE = 0

Target date INCDATE[AP.APPDATE,'+1m']

Multi-line Table to use: AP

Field for ranges: APPLEVEL (start and end values depend

on settings)

Appraisal due

Message Annual Appraisal due on <<AP.REVIEWDATE>> for <<EMPNAME>>

Selection AP.APPTYPE = 'A3' and AP.APPLEVEL = '6' and AP.COMPLETIONDATE = 0

Target date INCDATE[AP.REVIEWDATE,'-1w']

Multi-line Table to use: AP

Field for ranges: APPTYPE

Start value: A3

End value: A3

End of contract

Message Contract expires on <<CE.CONTRACTENDDATE>> for <<EMPNAME>>

Selection CE.CONTRACTENDDATE > CURRDATE

Target date INCDATE[CE.CONTRACTENDDATE,'-2w']

Multi-line blank

Disciplinary follow up

Message Disciplinary review due after <<CODEDESC[DI.DILEVEL]>> for <<EMPNAME>>

Selection (DI.REVIEWDATE > 0) and DI.COMPLETIONDATE = 0

Target DI.REVIEWDATE

date

Multi-line Table to use: DI

Field for ranges: DiLevel (start and end values depend on settings)

Company car renewal

Message Review co. car for <<EMPNAME>>. Renewal due <<INV.REVIEWDATE>>

Selection INV.REVIEWDATE > 0

Target date INCDATE[INV.REVIEWDATE,'-3w']

Multi-line Table to use: INV

Field for ranges: INVTYPE (start and end values depend on settings)

Long service award

Message 25 Years on <<INCDATE[CE.CONTSERV,'+25y']>> for <<EMPNAME>>

Selection CE.STATUS1 = 'A'

Target date INCDATE[CE.CONTSERV,'+25y-2m']

Multi-line blank

Retirement rundown

Message Retirement rundown begins for <<EMPNAME>> on <<INCDATE[DOB,'+65y-3m']

Selection CE.STATUS1='A'

Target date INCDATE[DOB,'+65y-3m']

Multi-line blank

Notes review

Message Review of notes recorded on <<NOTE.NOTEDATE>> in Notes for <<EMPNAME>>

Selection NOTE.COMPLETIONDATE = 0

Target date NOTE.REVIEWDATE

Multi-line Table to use: NOTE

Field for ranges: NOTETYPE (start and end values depend on settings)

Birthday reminder

Message <<EMPNAME>>'s birthday

Selection blank

Target date NEXTANNIV[dob]

Multi-line blank

Apprentice pay rise

Message Apprentice birthday increase due on <<NEXTANNIV[DOB]>> for <<EMPNAME>>

Selection JD.JOBPOSITION = 'T'

Target date NEXTANNIV[DOB,'-2w']

Multi-line blank

First aid course renewal

Message First aid certificate renewal due for <<EMPNAME>> on <<QUAL.REVIEWDATE>>

Selection CE.STATUS1 = 'A'

Target date INCDATE[QUAL.REVIEWDATE,'-3w']

Multi-line Table to use: QUAL

Field for ranges: DETAIL

Start value: HS004

End value: HS004

New starter review

Message New starter review due on <<INCDATE[STARTDATE,'+3m']>> for <<EMPNAME>>

Selection CE.STATUS1 = 'A'

Target date INCDATE[CE.STARTDATE,'+3m-2w']

Multi-line blank

Training evaluation follow up

Message Evaluation follow-up form to <<EMPNAME>>

Selection TR.COMPLETIONDATE > 0

Target date INCDATE[TR.COMPLETIONDATE,'+3m']

Multi-line Table to use: TR

Field for ranges: TRAINTYPE (start and end values depend on settings)

APPENDIX 3

ADVANCED OPTIONS IN REPORTS, LETTERS AND DIARY

Appendix 3: Advanced options in reports, letters and diary

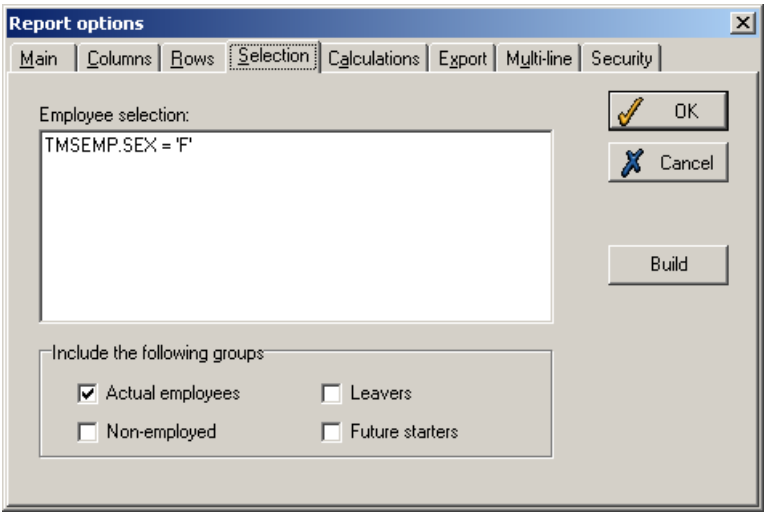
At various points in the system, you will need to enter selection expressions and calculations.

As these functions work in a similar way wherever you are on the system, they are explained in this appendix for general reference. You may also wish to consult the Report Writer user guide for details on how all these options are used by column reports.

When entering selection expressions and calculations, you may want to use the **Expression builder** to help you find the required fields and ensure the expression is valid. For details on this, see chapter 5 of the Report Writer user guide.

A3.1 Selection

The **Selection** panel allows you to select which employees are to be viewed or included in any report, letter or diary definition:



The example above would include all female employees.

Selection expressions containing 'and'

Using the word 'and' in your selection expression enables you to use multiple criteria to limit the selection.

Consider the above example. You may want to further limit the selection to include only those employees who are in a particular job grade:

(TMSEMP.SEX = 'F') and (JD.JOBGRADE = 'B2')

The two statements are enclosed in brackets and separated by 'and'. This example will include only female employees who are in job grade B2.

Selection expressions containing 'or'

If, for example, you want the letter to apply to all female employees in job grade B2 as well as all employees who started before January 2000, type this:

((TMSEMP.SEX = 'F') and (JD.JOBGRADE = 'B2')) or (CE.CONTSERV < @01.01.2000)

Symbols used in selection expressions

Selection expressions must give an answer of either true or false. To do this, they must use symbols like these:

=	equal to
>	greater than
<	less than
>=	greater than or equal to
<=	less than or equal to
<>	not equal to

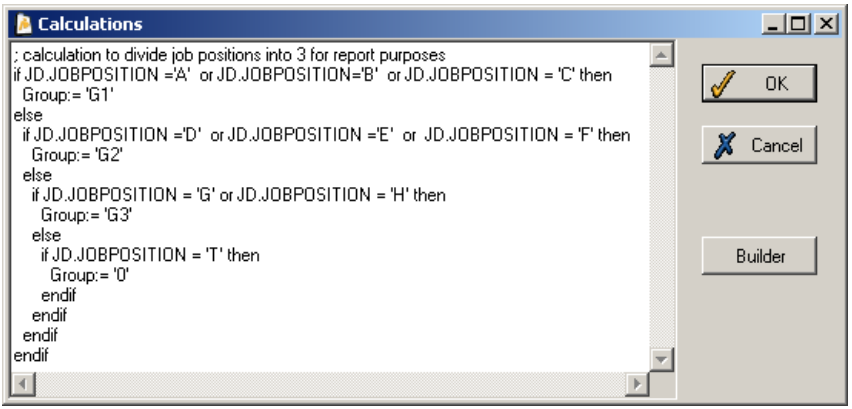
Other selection options

On the **Selection** panel for matrix reports and letters, you can select which groups of employees are included and excluded. In the **Include the following groups** section, there are four tick-boxes (tick as many as you require):

Actual employees	By default, only actual employees will be ticked. Whenever the report or letter is run, only those people currently employed (excluding contractors etc.) on that date will be included.
Leavers	Ticking this includes any employee who had left before the date for which the report or letter was run.
Non-employed	By ticking this, you will include any people who are not actually employed (e.g., contractors, visitors, agency staff).
Future starters	You should tick this if you wish to include anybody who is not an actual employee on the date for which the report or letter is run, but who has a start date in the future.

A3.2 Calculations

Calculations can be used to customise your reports, letters and diary entries, and develop them beyond the capabilities of selection. Fields can also be set up to use calculations so that they change their value when a related field changes its value. The **Calculations** panel looks like this:



Please note that not all reports, diaries or letters need to use calculations, so most of the time you will leave the **Calculations** panel blank.

Virtual fields

The example calculation above creates a 'virtual' field. This is a field which does not exist on the database, but which can be calculated and reported upon if set up on the **Calculations** panel.

In this example, there are several job positions on your system, but you want to report on them in three distinct groups:

Group G1 = Director, Senior Manager, Manager (positions A, B and C)

Group G2 = Supervisor, Professional Admin., Technical (positions D, E and F)

Group G3 = Clerical, Operator (positions G and H)

Trainees (position T) should not be included in any groups

The first line of the calculation has a semi-colon at the start. Anything prefixed with a semi-colon will not be included in the calculation - it is simply a comment. This first line is used to describe the calculation being set up. (You do not have to enter a comment.)

A new temporary field called Group is being set up. This will have values G1, G2 and G3. You can either type the calculation in directly, or use the expression builder.

This has been set up using a combination of the **If Then Else** button, the **Add code** function, the **=** symbol, the **or** button and the **:=** symbol.
Note that the **:=** symbol is used to specify what the value of the new 'virtual' field will be.

This temporary field of **Group** only exists for the report, letter or diary definition for which it has been set up. It can be used as a normal field there, but you would have to create it again if you wanted to use it for another report, letter or diary definition.

An alternative way of creating this field would be:

```
if JD.JOBPOSITION >= 'A' and JD.JOBPOSITION <= C' then

Group := 'G1'

else

if JD.JOBPOSITION >= 'D' and JD.JOBPOSITION <= 'F' then
Group := 'G2'

else

if JD.JOBPOSITION >= 'G' and JD.JOBPOSITION <= 'H' then

Group := 'G3'

endif

endif

endif
```

This was done using the **Add range** button, because we knew that the values of the codes to be selected fell within clear ranges.

Whenever you use the **If..then..else** button, the system will try to assist you by showing you where new lines are required. However, if you use it more than once, you may find that you need to modify it slightly. The structure you need is:

If (criteria, e.g. jobposition = 'A' or annualpay > 15000) **Then**
Specify the result required

Else

Specify the alternative

Endif

Or, where more alternatives are to be specified, then:

If (criteria, e.g. jobposition = 'A' or annualpay > 15000) **Then**
Specify the result required

Else

If (criteria, e.g. jobposition= 'A' or annualpay> 15000) **Then**
Specify the result required

Else

Specify the alternative

Endif

Endif

NB: there must be as many **endifs** at the end of the statement as there are **ifs** within it.

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