Release Notes

Product: Personnel Director (UK SQL) v4.0

Release Date: 17/10/2005

Contents

1 Introduction

Personnel Director (PD) has been enhanced to provide more customization features to the user. This document contains the release notes of PD (United Kingdom) SQL version.

This document lists the differences (new features, enhancements and bug fixes) between earlier market release versions and version 4.0 of PD – UK SQL.

2 New Features and Enhancements in v4.0

2.1 Pick List Enhancements

Linked Pick lists can be created. Essentially, the linked pick lists are those that would have pick values depending on the value of another field. A pick list can be set up in such a way that it is dependent on the selection of a value in a different Pick List.

For example, a user can set up a CITY Pick List so that the values displayed are linked to the country that the user had selected from a COUNTRY Pick List. This is done by setting the filter COUNTRY for the field CITY. Then, for each value in the CITY Pick List, the filter item that is associated with it is selected. (I.e., for London, Manchester and Leeds, the filter Great Britain is assigned.)

2.2 Mail Merge

A standard letter, memo, or fax can be quickly written to one or more employees and then either printed or sent to the recipients via email. Letters can be emailed to multiple employees with email addresses using the Filter, Group of Employees and Manually Select Employees options.
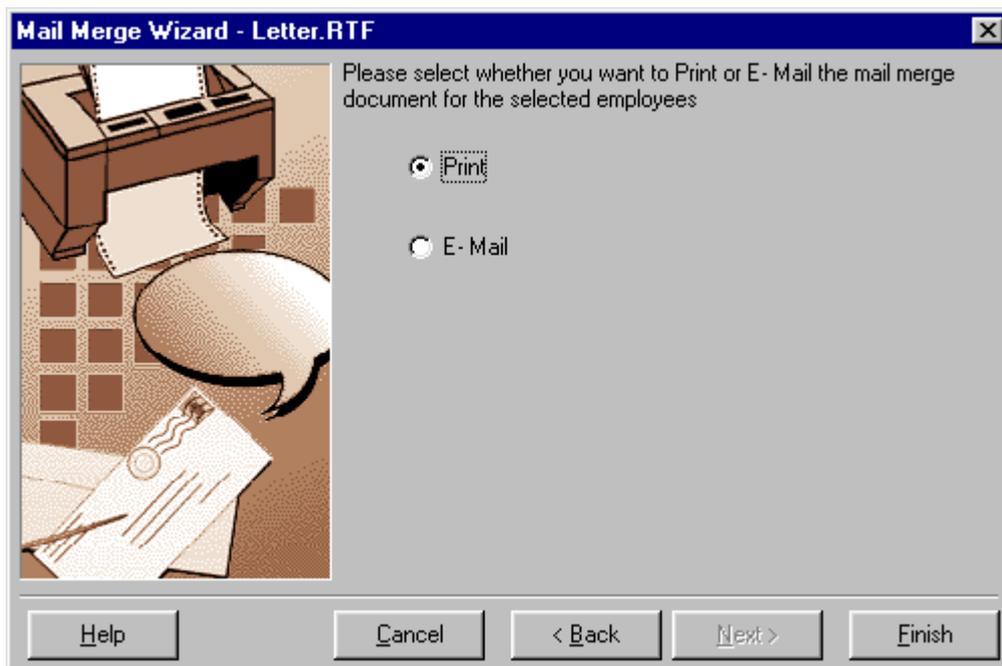
2.3 Scheduling Recalculation

Recalculation, which refreshes calculations, was available only in the Database Maintenance module.

In version 4.0, a separate application has been provided for this operation allowing it to be a scheduled operation.

2.4 Recalculate Service

A new recalculate program has been included in Personnel Director UK. This will run as a Windows NT, 2000, or XP Service Application and log success or failure in the Windows Event log.

2.5 Change Password

The user can change his password to improve security.

2.6 Employee Transfer

The speed of employee transfer has been improved so that it is unaffected by the number of employees being transferred.

Other improvements are: more accurate error logging and handling huge number of fields.

2.7 Parental Allowance

A new type of absence allowance has been introduced. A user can now create absence allowances based on **Parental leave**.

The absence allowance wizard currently has basis options like Length of Service, Age and None.

A new allowance basis 'Parental Leave' has been added to this wizard.

This allowance allows for absences, which employees can avail to spend time with their dependants.

2.8 Multiple Work Periods

The previous versions of Personnel Director assumed that all employees had the same work periods, as set in Company Pay periods screen. The Absence Days lost calculations were then performed based on this.

However, all employees in an organisation may not work at the same time or on the same days. Therefore, now each employee's record will state the work period that is applicable to him or her.

When calculating the days lost and hours lost in the Holiday and Absence screen, the calculation will be based on that specific employee's work periods.

A new screen called Employee Work Periods has been included to enter different Work Periods for the Employees.

Company Work Periods

Company Work Periods

Define different types of Work Periods in which the company operates. The User can enter the actual hours (after deducting break hours) in Hours text. Leave blank in Hours to automatically calculate the working hours for the day.

Work Period ID	Morning Shift		
	Start Time	Finish Time	Hours
☑ Monday	07:00	02:00	19
☑ Tuesday	07:00	02:00	19
☑ Wednesday	07:00	02:00	19
☑ Thursday	07:00	02:00	19
☑ Friday	07:00	02:00	19
☑ Saturday	:	:	0
☑ Sunday	:	:	0

The user can enter the whole year's Work Periods in advance in the Work Periods screen. Absence duration is calculated as per the effective Work Period for the given absence period.

Work Periods, 001 - Mr M Donaghy

Work Periods   001 - Mr M Donaghy

Start Date   17/10/2005

Work Period   Morning Shift

Weekly

Days   5

Hours   95

Summary View | Detail View

2.9 UK and US Date Settings

Previous versions of Personnel Director work only with the regional date settings configured as dd/mm/yyyy. The upgraded version will work for standard UK (dd/mm/yyyy) and US (mm/dd/yyyy) date settings.

2.10 Security on Delete Attached Documents

A user can be restricted from deleting attached documents by using functional security.

2.11 Input Format

The user can set the input format for text fields, i.e., if the user wants to enter data in a specific format for e.g., Bank Sort code (12-34-56), s/he can set the required format in the Validation tab of Field properties in Screen Designer. This format is verified whenever a record is saved.

There are 4 types of characters that the user can use for validation.

- o 0 - for Numerals
- o L - for Alphabetic characters
- o A - for Alphanumeric (Numerals and Alphabetic characters)
- o Constant (/, -, #, $, <space> etc.)

2.12 Editable Calculated Field

In this version of Personnel Director, the user can set a calculated field to be editable using Screen Designer. This allows the user to amend data in these calculated fields. Autocalculation occurs only if the field is empty.

2.13 New Employee Wizard Enhancement

All field security, format and display caption changes in the New Employee Wizard depend on user settings.
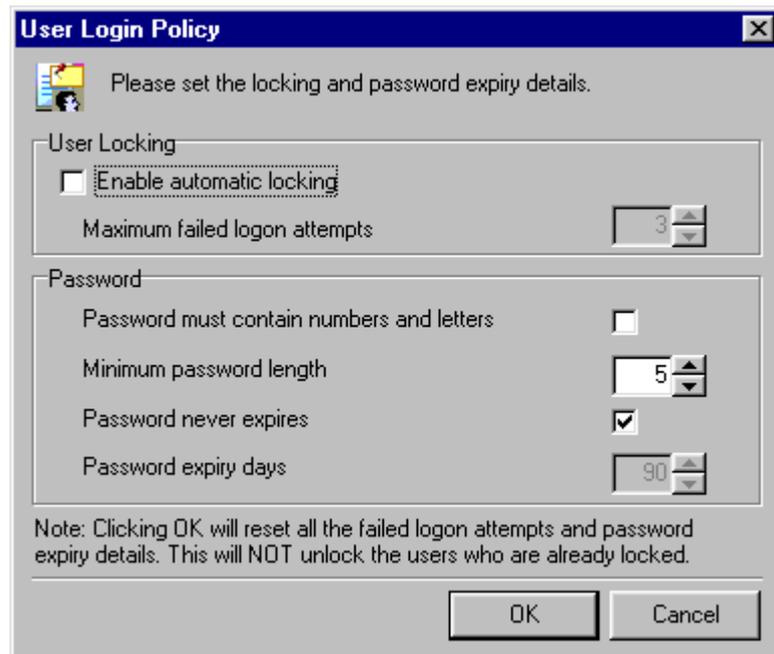
2.14 Audit Trail

Audit trail can be customized i.e., the user can enable/disable the Audit trail by Application, by Database or by Table.

- o Using Security Manager, users can enable/disable the Audit Trail for the Personnel Director application.
- o Users can enable/disable an Audit Trail for a specific Database using the Database Maintenance module.
- o Users can enable/disable an Audit Trail for a selected Table using Screen Designer.

2.15 User Login Policy

To enhance the security feature of User Logins, a new feature called User Login Policy has been implemented. This defines the Auto Locking and Password expiry details of the Personnel Director User Logins.

This function is included in the Security Manager Module, so that an Administrator (who has access to the module) can define these values.

2.16 User-defined validations in the Pay Calculation procedure

The user can set user-specific validations in the pay calculation procedure and can also modify the pay calculation formula using Screen Designer.

2.17 Improved Search Database feature

The user has the option to specify the fields to be displayed in the result set.
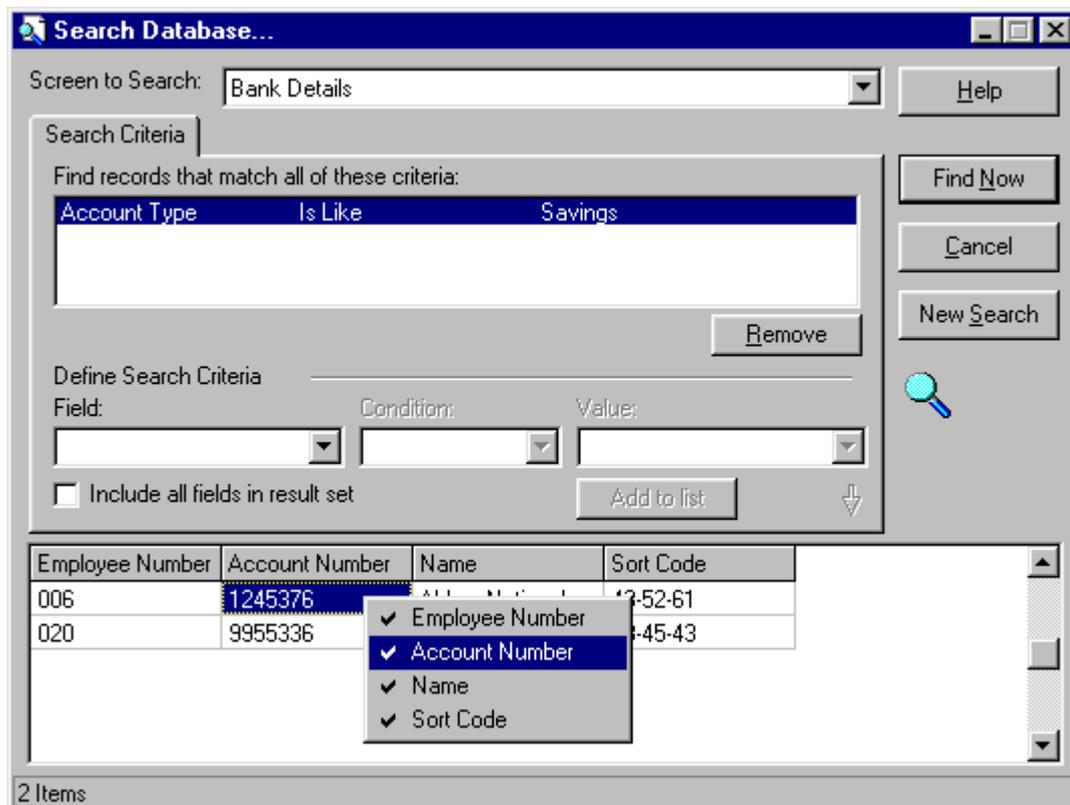
2.18 Customisable Employee Record Captions

The user can customise the employee record captions displayed at the top of all Employee Screens.

2.19 Formula Builder Enhanced

(a) Calculated fields can be used in the formula of another calculated field.

(b) In the Pay history screen, the user can specify the company pay periods, and currency exchange rates using formula.

Note: Assigning a complex formula to the pay fields may have an impact on recalculation speed.

2.20 Employee Navigation Feature

There are now two modes to browse employee records. User can toggle between these two modes.

In the **Normal Mode**, the employee navigator will be displayed to the user. In the **Search Employee Mode**, user can search the records based on the values in First name, Surname and employee number and can also specify the number of records to be listed in the result set (0 to list all records, or can specify up to 999).

Clear button will clear all the search parameters and the result set. On doing so, the parameters used in the search employee screen will be restored for that PD Client.

If all the records are displayed, clicking on the title will sort the result set either in the ascending or descending order.

2.21 Copying an Employee

Using this feature, the user can duplicate an employee's records, i.e., this allows one to create a copy of an employee in the same database or into another database but with a new employee number. The new employee number will be appended with -1, -2….., up to –9 and then –A so on up to –Z, to maintain the uniqueness of the employee number.

The new number will be generated by adding either 1 to 9 or A to Z to the end of the existing number. The user can, however, change the new number to any other number of their choice.

If the employee is copied into the same database, Personnel Director will recalculate the new employee record automatically (which will calculate the new Postname, Employee record caption etc.), otherwise the user will have to do a manual recalculate on the database into which the employee is copied.
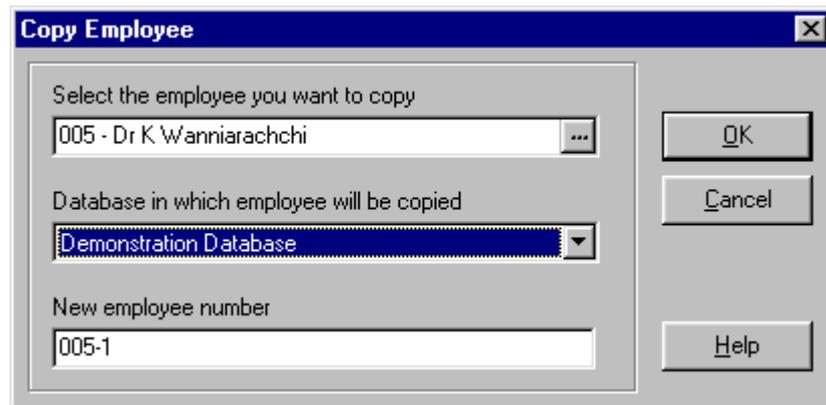
2.22 Start Date in CPE/CPD Screen

The Year in the Training Plan is replaced with Training Date. All Training plan table records' years are moved into the training date field with Jan 1st as the date.
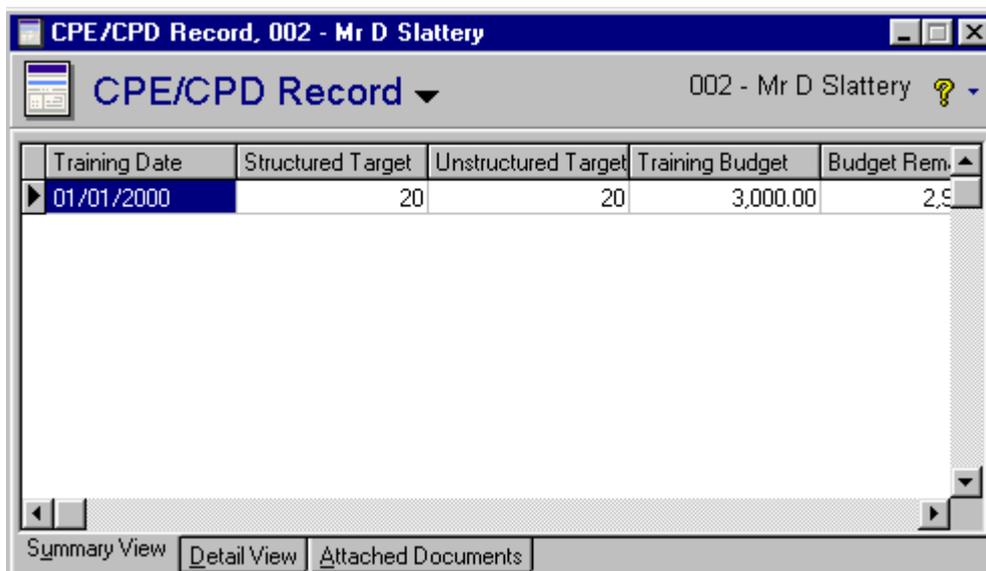
2.23 Improved Employee Filter

In the Filter option in Employee navigator, new options 'Is Blank' and 'Is Not Blank' have been included.

2.24 Career Event in Current Pay change

User can specify whether the career event is to be recorded when the current pay is changed.

2.25 Recalculate on employee database controlled by a User Setting

This option will enable the user to specify whether the user database needs to be recalculated for scheduled/service recalculate.

Using the Maintain Database list or New Database screen, the user can set whether a database is to be recalculated or not.
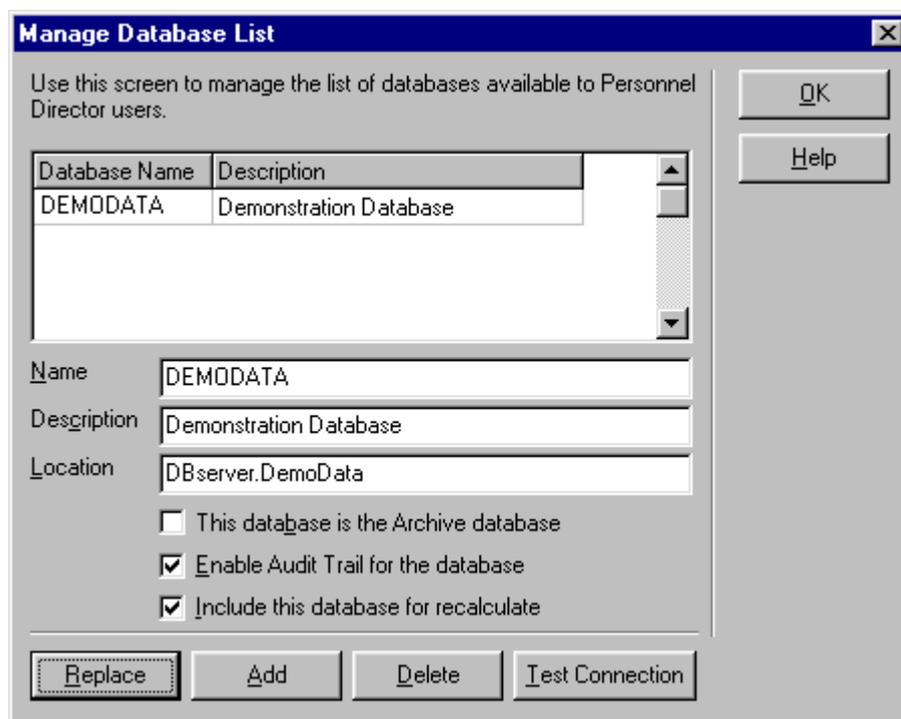
2.26 New Screen Icons in PD

Some icons in PD have been replaced with new icons resembling those in Win XP.

New icons will be included only for fresh installations of PD. Background colour of the Employee shortcut bar has been changed from dark grey to light grey.

2.27 Database Set-up Program

A set-up tool **PDDBServer.exe** has been included which eases the installation steps involved in the setting up of a new PD server. This will automate the process of database creation and populate it with basic data. This will create the database in a MS SQL server machine available in the LAN.

2.28 Upgrade Program

The new database upgrade will improve the efficiency of the upgrade program. It is more transparent and is also re-applicable i.e., multiple runs of the upgrade program will not corrupt any data.

Note:

- o If you are upgrading from **v3.6.2.0** of PD UK SQL you only need to run **VBTDBUpgrade.exe**.

- o If you are upgrading from earlier versions you need to run **PDUpgrade.exe** to bring the database at par with v3.6.2.0. Then, run **VBTDBUpgrade.exe.**

Please read the Upgrade Instructions for more details.

3 Bug fixes in v4.0

This release of PD UK contains many known bug fixes.

Area	Description
Personnel Director	Screen Correction and Alignments. Field Security was not applied to the New Employee Wizard. Now this can be set based on Preferences. For PDSUpgrade.exe/Vbtdbupgrade.exe the limit of 10 characters for the sa password is removed.
Screen Designer	Message fixes for Field definition.