Personnel Director

Basic Training Manual

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1. Getting Started

1.1. Opening Personnel Director.

Starting Personnel Director & Logging on.

To Open Personnel Director:
A. Double click on PERSONNEL DIRECTOR Icon on the DESKTOP,

OR

B. START>PROGRAMS>VIZUAL BUSINESS TOOLS>PERSONNEL DIRECTOR>Personnel Director

- A dialog box will appear requesting a user name and password.
- Enter the USERNAME and PASSWORD, which you have been provided with by your system Administrator.
- Click OK

Personnel Director should now open, showing the Employee Details screen.

Personnel Director consists of:
- The title bar which show which database is currently active,
- Standard Windows drop down menus,
- Toolbars for accessing some of the key tools in Personnel Director
- The Shortcut bar, which is split into sections (Employee, Absence and Payroll, Employment, Training and Education). From here we can open all the different employee sub-screens,
- The Status bar,
- The Main viewing area is where the Employee screens appear.

Each sub-screen consists of a Summary View, a Detailed View and Attached Documents view, the name of the current employee and the name of the current sub-screen.

1.2. Working with Personnel Director Databases.

Personnel Director has three standard databases:

Example Database – a sample database as seen when opening Personnel Director for the first time. This can be used at any time to refer to completed records and experiment with tools such as Batch Inputs, which is something you wouldn't do in your live database.

Personnel Database - storage for all of your company employee records data, referred to as your live database.

Archive Database – storage for retaining records of employees that have left the company.

To identify which database is currently open check at the top left of the Main window. The text "Personnel Director - Example Database" will appear if the Example database is currently open.

1.3 Opening Personnel Director Databases

Simply click on the OPEN button on the toolbar, select the database you wish to open and press OPEN

1.4. Finding Help

There are two main ways of getting help with using Personnel Director.

A. The built in Help tool

1. Click on the HELP button on the toolbar.
2. Click on the Binoculars icon (if this is the first time you have used this you will be prompted to Create a Word database. Simply press NEXT and then FINISH to complete this task).
3. In the first box type in the key word of the topic which you require help on.
4. In the second box the search results will be displayed. Click on the best match.
5. In the Third box, you will see a list of specific topics where that key word appears. Double click on the relevant topic and in the right window the Help should be displayed.

B. Using the On-line manual

To locate the Manual, Click on the following:
START>PROGRAMS>VIZUAL BUSINESS TOOLS>PERSONNEL DIRECTOR>ONLINE DOCUMENTATION>Online Manual.
This will open the user manual where you can look in the contents in the left window to find the relevant section.

2. Using the Navigator

The navigator is used to display a list of your employees by any field, from the Employee Details screen. For example, you can view your employees by which department they work in. This will make it easier to locate employees.

2.1 Activating/Deactivating the Navigator

To activate or deactivate the navigator, Click on the NAVIGATOR button on the Main toolbar.

2.2 Changing the Navigator View Criteria

To change the Navigator View Criteria:

1. Click on the CHANGE CRITERIA button on the Navigator Toolbar
2. Select the First Group you wish to GROUP BY (for example Division)
3. Select the Second Group you want to group by in the THEN BY field (for example Department)
4. Select the Third Group you want to group by in the next THEN BY field (for example Gender)
5. Select the field you wish to SORT the records by (for example Surname)
6. Click OK.

You may find that you only need to group by one field, for example Department. If so, simply set the two Then by fields to <None>, which is at the top of the list of fields.

If you are using a multi-user version of Personnel Director, you may wish to press the refresh button on the Navigator toolbar periodically to show any changes made by other users to the Employee Records and this will then be reflected in the Navigator.

2.3 Groups and Filters

The Navigator is also used for setting up groups and filters which, can be used in conjunction with other tools in the system. For example if a group of employees attend the same training course we can create the same Training Record for them, by creating a Group of these employees and using another tool called a batch input, rather than individually create the record for each employee who attended the course. (this will be discussed later).

The difference between a Filter and a Group is that Filters search for employees with matching criteria or Values from the data in the database. This means that they are dynamic, so that if an employees details change, this will be reflected in the Filter. For example, If you had created a filter called Under 25's where the criteria was Age Is Less Than 25. Once an employee became 25 or older they would automatically be removed from this Filter. If there were another filter for employees 25 or over, then they would automatically become a member of that Filter.

A group however, allows you to define a group of employees who have no common denominator, where there is nothing in the database, which is matching. For example you need to view everyone who is a Fire Marshall. There is no field in the Database, which informs us that an employee is a Fire Marshall, so this is where we would use a group.

Groups and Filters are explained in more details below:

2.4 Groups

The Groups you define are available for you to select at anytime. You can create as many groups as you require and an employee can be a member of as many groups as you require, but these will only work in the database where you created them.

Important Information: Groups are not dynamic. Therefore you need to constantly keep a track of changes to Groups and use the Maintain Group feature to keep them up to date.

Displaying a group

Click on the GROUP Icon on the Navigator Toolbar
Select the group you wish to view, for example Fire Marshall's.
Click OK

The navigator will now display just the employees in this group and a total will be displayed at the foot of the navigator.

If you wish to view all Employees again in the Navigator, click on the Remove Group/Filter button on the Navigator toolbar.

Creating a New Group

1. Select the MAINTAIN GROUPS from the EMPLOYEES menu
2. Click on ADD
3. Enter "Fire Marshall's" and Click OK
4. Highlight employees one by one or if they are positioned next to each other or hold the shift button and highlight the relevant names.
5. Click the > button to add them to the group list
6. Click OK

This group can be modified at anytime by following the steps above. To add another employee to the group, simply double click on their name in the left window, to remove an employee simply double click on their name in the right window.

By selecting the Group button on the Navigator Toolbar, you should see the "Fire Marshall's" in the Group list.

To delete a Group, select the group to be deleted from the drop-down list, and click the Delete button. *This deletes the group and <u>not</u> the Employee Records.*

2.5 Filters

Before you can run or create any filters you will need to understand how a filter is defined. You will need to establish what it is you are looking for and how to tell the system to look for it. To do this you will need to make a note of the 4 'settings' below:

Screen/Table	(Which sub-screen holds the information we are looking for)
Field	(which contains the value we are searching for)
Operator	(which determines how the information is found)
Value	(which is the information we are looking for)

For example, if we are trying to find all the people in the Administration Department we would use the following settings:

Screen/Table	= Employee Details
Field	= Department
Operator	= Is Equal to (we want to find an exact match)
Value	= Administration

You will only learn the location of fields by using the system and making a mental note of which fields appear under which
Screens/Tables.

Operators:

There are eight basic operators:

Operator	Example
IS EQUAL TO	Everyone in the Administration Department
IS NOT EQUAL TO	Everyone **except** the Administration Department
GREATER THAN	Greater than a date or value
GREATER THAN OR EQUAL TO	Greater than or Equal to a date or value
LESS THAN	Less than a date or value
LESS THAN OR EQUAL TO	Less than or Equal to a date or value
CONTAINS	Use % as a wildcard to show all the Managers by entering "% Manager" as a value, using the Job Title Field.
DOES NOT CONTAIN	As above but showing everyone **except** the Managers for example

Creating a Filter

This example is a quick step by step guide for creating a filter to just show the Employees in the Administration Department.

1. Click on the FILTER button on the Navigator toolbar
2. Click the NEW button
3. Click on the AUTO REPLACE option so that it is unchecked.
4. Choose Employee Details TABLE from the list of Screens/Tables
5. Choose the Department FIELD from the list of available fields
6. Choose the IS EQUAL TO Operator
7. Click on the RED ARROW button (Suggest Values) and choose ADMINISTRATION
8. Click the ADD button
9. Click OK
10. Type in a name for the filter
11. Click OK

To view the filter, Click on the filter you just created and press, the SELECT button

When the filter is run, the name of the filter appears at the foot of the Navigator along with how many people are in this filter. To view all employees again, click on the REMOVE GROUP/FILTER button on the Navigator Toolbar

If you wish to create a filter to find employees with more than one matching criteria/Value:

1. Click on the FILTER button on the Navigator Toolbar.
2. Click on the Filter you wish to edit and press the EDIT button
3. Repeat steps 4 to 8 above changing the Screen/Table, Field, Operator, Value to whatever it is you wish to search for in addition to the original settings.

For example, if you wanted to show all employees in the Administration Department who earns less than £12000, use the following settings (Remember to use the Add button after entering each filter):

Screen/Table	Field	Operator	Value
Employee Details	Department	Is Equal to	Administration
Current Pay Details	Annual Pay	Is Less than	12000

If you run this filter in the Demonstration Database, the results will show Miss Stella Dibbens

3. Working with Employee Records

When creating records in Personnel Director, whether it is a New Employee or to add a new Pay record to reflect a pay rise, it is important to remember the following rules:

- **ALWAYS Press the NEW button on the toolbar.**
- **ALWAYS press the SAVE button on the toolbar when you have finished entering the information**
- **When using the Pick List fields ALWAYS ensure that you click on the Picklist button and choose an item from the list of.**
- **If you have to add an item to a pick list, AWAYS open the picklist, type the new item in the box at the foot of the Picklist, ensuring that you type it in correctly and then press the ADD button.**

When adding a New Employee, **ALWAYS** use a unique Employee Number (***THE ONLY COMPULSORY FIELD IN PERSONNEL DIRECTOR IS THE EMPLOYEE NUMBER FIELD***).

NOTE: The key to a successful database is consistency of the data. Always remember the "Rubbish in, Rubbish out" saying. This basically means that if the data is not consistent then the reports and other tools used such a filters will never work properly.

3.1 Adding New Employee's.

1. Open the Employee Details Screen from the Shortcut bar
2. Click the new button on the Toolbar
3. Enter the Employee's details using the tabs below, remembering to always use the Picklists where applicable.

- Employee Details
- Contract Details
- Pay Details
- Personal Details
- Dates
- Working time Details

The Employee Details Screen is the Main screen in Personnel Manager and only records the current information for each employee. All the other screens in the shortcut bar are what are referred to as Sub Records or History Screens and these record multiple records per employee. For example, the Pay History screen will record all the different pay records an individual has received during their time with the company, (providing you remember to Press NEW when making a change to the employees pay, rather than edit the existing information).

Note: No Sub-Screens are compulsory so you need only enter information on the screens you will find useful. However it is important to remember that the more information you enter in the Personnel Director system the greater the number of reports you can produce.

Every sub record contains three tabs:

- A **Summary Tab**: This will give a list or summary of all the details held under the selected sub record for the employee you are currently viewing.
- A **Details Tab**: This will display the full details of each record entered for the selected employee. Data is always entered through the details tab.
- An **Attached Documents Tab**: This will display the links to documents that have been attached to the current employees record.

3.2 Setting up the new employees pay

1. Open the PAY HISTORY Screen and select the relevant employee using the Navigator
2. Press NEW to create a new pay record
3. Enter the pay details, ensuring that you enter the correct information into the following fields:

From Date	The date from which the new pay will take effect.
Pay	The amount of pay (Hourly, Annual etc)
Pay Basis	How the pay is paid - Per Annum, Per hour etc
Pay Period	Frequency of pay - Weekly, Monthly etc
Contractual Hours	No. Hours the employee is contracted to work per week
Allow Overtime	Yes or No

3.3 Tracking Employee Holiday and Absence

FURTHER INFORMATION See Personnel Director User Guide Page

Assigning an Absence Allowance

1. Open the ABSENCE ALLOWANCE Sub Screen and select the relevant employee using the Navigator.
2. Assign a new allowance by pressing NEW.
3. Choose which allowance to use
4. Select the start date for this allowance.
5. Add any days carried forward from previous allowance or days in Lieu.
6. Click OK.

Entering Holiday and Absence Details

It is essential to keep track of all authorised and unauthorised absence, sickness and holiday for each employee, on an ongoing basis. Holiday and absence allowances can be linked directly with an employee record with their individual start and end date for their allowance stored. In addition an absence calendar and schedule are available to analysis patterns of absence.

Displaying Holiday and Absence Summary

The Holiday and Absence allowance screen can be found in the Absence and payroll shortcut group.
1. Select ABSENCE AND PAYROLL
2. Select HOLIDAY AND ABSENCE
3. Select SUMMARY view

The screen is divided into two. The top half displays the record for all holidays and absence taken. The bottom half contains the current year absence allowance.

Recording Holiday and Absence

1. Open the Holiday and Absence Sub Screen, in the Detail View
2. Select the relevant employee.
3. Click NEW to create a new record.
4. Enter the details of the holiday (Start Date, End Date, Category, Reason)
5. Click SAVE.

Please note that the system automatically calculates the days 'lost' and hours 'lost' when you enter a start and end date. This is taken from the Company Pay Period settings, but can be manually edited when creating the record if desired.

In SUMMARY View, you will be able to see the allowance details as well as a list of the employee's absence record.

If you wish to enter a booked holiday, but do not wish the system to include this within your allowance calculation, simply delete the days lost and hours lost values. These 'booked' absences will not effect your allowances and only show actual days taken and days remaining. Once the 'booked' days have been taken, edit the record, entering the days lost and hours lost. These days will now be included.

This record can be amended at any stage. As soon as you alter text on this screen you will notice that the record toolbar buttons change to Save and Cancel.
All changes can be made remembering to click on save when completed. In addition items on the summary view can be deleted by highlighting an item and clicking on the delete button on the toolbar - **This applies to all sub-screens**

Changing Absence Categories

You may require creating additional Categories of Absence which cannot be done on the Holiday and Absence screen. To do this you will need to:

1. Open Absence Allowances from the Company drop down menu.
2. Select Create New Allowance
3. Click Next
4. Click on the Absence Category Picklist
5. Enter the category you wish to add
6. Click ADD
7. Click Cancel
8. Click Cancel

This will add the category, even though you did not create a new allowance. To verify this, open the Holiday and Absence screen in detail view and click on the Category picklist button. The new category should be added to the list.

Absence Calendar

Personnel Director allows you to display holiday and absence records in the form of a chart. The current employee's chart will be displayed

1. Select 'Tools'
2. Select 'Absence calendars'

To change the colour of the legends:

1. Select The legend colour square to be changed by clicking on it
2. A colour chart will be displayed for you to select the new colour and click OK

Absence Schedule

The Absence schedule allows you to view all employee details together on one screen on a two week view, so that you can monitor the activity to prevent too many people being off at the same time leaving you short of staff. It will also highlight any similarities among employee's absence dates and duration.

The Red navigation buttons on the Absence Schedule toolbar allow you to move from month to month. The left arrow takes you to the previous month, the right arrow takes you to the next month.
This list will show all employees and all absences as a default. Later we will discuss how to use the 'Filters' Option to reduce the list of employees down to certain individuals or departments. Using the Filter option you will be able to define exactly which employees to include in this Schedule.

3.4 Other Sub-screens

All of the other sub-screens work in the same or similar way to the Pay History and Holiday and Absence screens
.

Remember to press New when creating a new record and Save to save it. Also don't forget to use the picklists where applicable.

3.5 Editing & Deleting records

Note: Because this process will permanently delete an employees details, it should only be carried out by the System Administrator.
It is very simple to delete an employee record, however even if an employee leaves the company it is recommended that you retain this information into the archive database.

IMPORTANT NOTE
In most cases you will not want to delete the record completely, even when an employee leaves the company. Archived records can be retrieved at any time, in case an ex-employee rejoins the company or a prospective employer of ex-employee contacts you for a reference.

3.6 Filtering Records

Record filters are useful when you want to view only certain types of information for an employee relevant to a specific screen.

Creating a filter

In this example we will view only the Holidays in the Absence and Holiday Screen.

1. Open the Holiday and Absence Screen
2. Find the employee you wish to view using the Navigator
3. Click on the Filter button on the Personnel Director toolbar
4. Choose *Category* from the list of available fields.
5. In the By Value box, type **Holiday**
6. Click OK

The Employees Holiday and Absence screen should now only show the employees holidays.

To refine the filter

Once you have created a filter, you can further refine the results using a different field value or range. For example, if you wanted to see who took holidays over a couple of years, you would first filter using Holiday as the Category as per the above example, and then filter using the Year range.

Whilst still in the Holiday and Absence screen, with the previous filter still applied (if you have closed this screen you will have to start again as these filters are not saved):

1. Click on the Filter button on the Personnel Director toolbar
2. Click on the All Fields tab
3. Choose the Year field
4. Click on the By Range option
5. Type in the first box, 1997
6. Type in the second box 1999
7. Click OK

This will show the employees Holiday between 1997 and 1999.

3.7 Printing an Employee Record Card

If you wish to print the information on an employee record card, simply press the print button on the toolbar, whilst viewing the Employee Details screen or any of the sub-screens.

Note: Whenever you select 'Print' in Personnel Director, you are always shown a preview of the document, before it is sent to the printer. A Record Card shows all an employees personal information, such as: Name, Address, Phone No., All key Dates, Organisational Information and Pay Details. This can be opened by pressing the Print button on the toolbar whilst viewing an employee's Employee Details screen.

The entire report is then displayed on screen and the toolbar offers options to:

Save to disk
Review and modify the report setup
Print
Preview records
Preview report

3.8 Find records

To quickly find an employee click the Find button on the toolbar.
Using Find, you can only search on Surname, First name or Employee Number.

NOTE: For this tool, use the Find button which looks like a pair of binoculars with a lightening bolt through them (this is referred to as Quick Find, rather than Find and can also be opened using CTRL + Q).

3.9 Using Batch inputs

A Batch input is a tool which can be used in conjunction with a group or a filter to create new records for more than one employee simultaneously. A good example of this would be when you have a group of employees who have attended the same Training Course, or if you would like to create a Holiday for all your employees over the Christmas period, known as Company Shutdown.

NOTES: You will need to create your group or filter before starting the Batch Input.
You may also wish to back up your database before starting the Batch Input in case you make a mistake.

To create a Batch Input

1. Choose BATCH INPUT from the TOOLS drop down menu.
2. Click NEXT on the first screen.
3. Choose the Sub-Screen you wish to add a record to (E.G. Training History), Click NEXT
4. Choose the fields you would like to add data into, Click NEXT
5. Choose Group, Filter or Manually Select Employees to determine who will be given this new record, Click NEXT.
6. Enter the data for the first employee in the list.
7. Then click on the Duplicate Values button on the toolbar, ensuring that the employee where you have typed in the data is still selected.
8. Click YES. These 'values' will then be pasted into all of the selected employees to save you from having to type them all in again.
9. Once complete press the Save Icon (Perform Batch Input button) and Click YES
10. Click OK
11. Click FINISH

Please remember Batch Inputs are not reversible. Take care when typing in the Values (data) in the Batch Input to avoid any spelling mistakes etc, otherwise you will either have to restore the backup you made previously or you will need to go through each employee where a new record was created and manually amend the mistake.

3.10. Archive and Transfer

When an employee leaves the company, you would not want to delete their records in case they decide to return or you may be required to write a reference for them etc.

Note: There is a database entitled 'Archive' where all left employees information will be stored by default. However by using the Transfer option detailed in this manual, you can place employees in any database you wish. Employees can either be archived individually, (Archive Employees), or as a group, (Archive Leavers). Archiving Employees

Archive an employee:

The current record employee details screen needs to be displayed on the main screen opened for the employee to be archived

1. Select Employee using the navigator
2. Select ARCHIVE EMPLOYEES from the EMPLOYEE drop down menu
3. Select CURRENT EMPLOYEE
4. Click OK
5. Confirm Action

Archive Leavers

Note: Ensure that when you enter a date in this function that it is the correct date.

1. Select Employee using the navigator
2. Select ARCHIVE LEAVERS from the EMPLOYEE drop down menu
3. Select the date that will archive all employees with a leaving date on or before that date
4. Click OK
5. Confirm action

The employee details are now archived in the archive database.

IMPORTANT NOTE
The following rules apply for transferring an employee to another database.
The Employee Number of the Employee that you want to transfer cannot be used by an existing employee in the target database
If you are using the multi-user version of Personnel Manager, you cannot transfer an employee if another user is editing any of the employee's details.

Note: When you archive an employee, All their history and sub record information is archived with them. Therefore, unlike some personnel systems, you can archive and unarchive an employee as often as you wish, without the fear of losing data.
To view employees in the Archive database simply use the 'Open Database' function to open the Archive.

Transferring Employees

This Data can be transferred back to an active Personnel database at any time, by accessing the archive database and selecting transfer employees.

1. Open the database where the employee you wish to transfer's record is located.
2. Select Employee using the navigator
3. Select TRANSFER EMPLOYEES from the EMPLOYEE drop down menu
4. Click OK
5. Choose the Database where you want this employee to be transferred to
6. Click OK
7. Confirm action

Note: This process will transfer an employees information from one database to another, therefore this process should only be carried out by the System Administrator.

4. Personnel Director Diary
Personnel Director provides a very easy to use diary to keep track of important meetings, interviews and other events or if you prefer MS Outlook can be used

4.1 Viewing the diary
To view the diary, simply click on the Diary button on the toolbar.

4.2 Moving through dates
To move through the dates, either:

1. Use the left and right arrow buttons to take you to the previous or next week respectively.
2. Use the Go to Date button and specify the date you wish to view
3. Use the Show this week button

4.3 Inserting reminders/appointments
Many reminders will have been automatically entered into the diary by the Diary Triggers which will have been set up on Personnel Director (See the Company Settings section if this has not been done).

In addition to this you may wish to add your own reminders by clicking on the New Reminder button and then enter the details of the reminder before clicking OK.

4.4 Printing the Diary
1. Select ‘Print’ from the tool bar
2. Enter a date range
3. Select ‘Print all events’
4. Click OK
5. Select ‘Print’ button on toolbar

A print preview screen will be displayed

4.5 Diary Reminder Monitor
In order for the Diary monitor to be able to notify you of any reminders whilst Personnel Director is not active, there is a Diary Reminder Monitor which can be found in your System Tray (next to the Time on the Taskbar).

To open the Diary Monitor, simply double click on the icon. From here you can disable or shutdown the monitor.

If you would like to prevent the reminders from popping up indefinitely, choose the Disable option.

To stop the reminders from popping up, for the rest of the day, Choose the Shutdown option. (This will appear again, once you restart your PC).

4.6 Reminder pop-up window
A Diary Reminder pop up window will display your diary reminders, which will include the name and number of the employee and the reminder text.

Dismiss – will allow you to prevent the reminder from being displayed
Postpone – will allow you to ‘change the time to be reminded again in’ box and then click postpone.
Open item – will allow you to see the diary reminder dialogue box, if you need to amend this event

5. Letters

Personnel Director has many pre-defined letter templates that you can edit and manipulate into any format you require. It also has it's own built in word processor allowing you to create your own mail merge templates.
The Standard Letter, Memo and Fax templates are available from beneath the Tools menu.

5.1 Set my Record/Office

To set up Personnel Director so that it recognises your record and therefore allows you to 'sign' letters from yourself automatically:

1. Open the Employee Details Screen and find your record.
2. Choose SET MY RECORD from the View Menu
3. Choose SET MY OFFICE from the View Menu
4. Click OK

The system will now know that this is 'your' record.

You must be aware that whichever record you define as 'My Record', will be the record that the system uses to attach 'My Record' details within mail merge templates.

Choose SET MY RECORD from the VIEW Menu
To test, Choose, VIEW MY RECORD from the VIEW Menu whilst viewing an other Employees record.

5.2 Run a Letter using existing letter template

To send a letter using one of the existing templates within Personnel Director:

1. Click on the Letters button on the Toolbar.
2. Find the letter template you wish to use by navigating through the Letters Folder.
3. Double click on the chosen template
4. Choose the employee(s) you wish to send the letter to
5. If the selection is OK, click Finish
6. Enter a description for this letter (this will be recorded in the employees Correspondence history screen).
7. Click OK

MS Word should now open merging the chosen employee(s) data with the letter template you chose. You can now print and/or save this letter as a Word Document.

5.3 Create a new Letter template

1. In the 'Letters folder' in the Personnel Director Explorer, navigate to the folder in which you want to create the new letter template.
2. Click the 'New button'
3. Click the 'Letter' radio button and type a name for your letter, and then click OK. The word processor is started and a new blank document is created.
4. Type the text and any mail merge fields that you want in your template using the INSERT MERGE FIELD button on the toolbar
5. Select a field from the list of available fields by clicking on it (you may have to scroll down to find the field you wish to use in the mail merge.
6. Repeat these steps to add all the other fields you wish to use in this letter template.
7. When you finish, save the document and close MS Word.

IMPORTANT NOTE
Only information (fields) from Company Details, User, Employee Details and Current Pay is available for merging.

5.4 Editing an existing template

1. In the Personnel Director Explorer, click the Letters folder.
2. Click the subfolder containing the template you want to select.
3. Click the template you want to edit, then right click and select OPEN
4. To insert a new merge field using MS Word, click on the INSERT MERGE FIELD button on the toolbar
5. Select a field from the list of available fields by clicking on it (you may have to scroll down to find the field you wish to use in the mail merge.
6. Repeat these steps to add all the other fields you wish to use in this letter template.

IMPORTANT NOTE
In the Personnel Director integrated word processor, all merge fields are preceded by a percent sign % and displayed inside square brackets (%[and]); for example, %[Surname].

5.5 Create mailing labels

To create a new template using Microsoft Word (you have to be using Word as your Word Processor), follow these steps:

1. In the Personnel Director Explorer select the 'New Letter' icon from the toolbar.
2. Select Mailing Labels and enter a name for the labels, then click 'OK'.
3. Microsoft Word will start and you can begin to create the mail merge template
4. From the 'Tools' drop down menu select 'Mail Merge' and the following screen (or similar depending on the version of Microsoft Word that you are running) will appear.
5. Click the 'Setup…' button, to bring up the 'Label Options' window. Select the label type that you would like to use and click the 'OK' button.
6. The Create Labels screen will appear. Enter the text and merge fields you wish to appear on the label, and when you have finished click on the 'OK' button. An example is shown overleaf:
7. You will be returned to the Mail Merge Helper screen. Click on the 'Close' button to close this screen and start editing the label template. When you have finished, save and close the document as normal and the document will be saved as the name you gave in step 1. DO NOT use Save As and save the template in another location, as Personnel Director will not know where the template is to open it.

You will then be returned to the Personnel Director Explorer screen. To print the labels simply double click the Mailing Labels you just created.

5.6 Correspondence History

Correspondence History is one of the available sub records within the system. If you select to update the Correspondence History for employees when you are writing letters, then each employees record is updated to show, the date the letter was produced, the name of the letter and any comments that you enter when prompted Setting My Record.

5.7 Attaching documents

To attach a document in an employees record:

1. Open up the screen you wish to attach a document to
2. Find the relevant employee
3. Select the Attach Documents tab at the bottom of the screen
4. Click on the paperclip icon
5. Find the document you wish to attach
6. Click OK

6. Query's

Creating database queries is useful when you want to view or export data, based on data in Personnel Director. These queries can be saved and used over again. Note: Queries are dynamic. Each time the query is run, it will show data as it appears at that time.

Database queries can be as complex as required retrieving information from one or more Personnel Director tables based on complex search criteria.

6.1 A Summary Query

This example of a summary query shows the headcount by Department.

1. Click on the Query button on the toolbar.
2. Select New Query (Button or File menu)
3. Select Query Wizard, OK
4. Choose Tables
5. If choosing more than one table, Click OK when the Join Tables dialogue box appears.
6. Next
7. Choose the fields you wish group the data by, for this summary query (i.e. Department)
8. Next
9. Add Calculations, by double clicking on the chosen field (i.e. Annual Pay), this will open the Calculate Fields dialogue box.
10. Choose the calculation (i.e. Sum) and press OK.
11. Create a Headcount calculation by, double clicking on any text field from the Employee Details screen (i.e. Employee Number).
12. Then choose Count as the Calculation. When you click OK, the calculation will look as follows, Count(*).
13. Next
14. Select Group Fields will automatically select the fields chosen in step 9.
15. Next
16. Next
17. Next
18. Enter a name for the query.
19. Finnish
20. Click on OK to close the Preview Data screen

To Sort the Data in a Summary query

In order for the Summary Query to work properly, we must change the order to sort by the Department by:

1. Click on the A-Z button in the data tab.
2. Double click on the fields we wish to sort, in this case, Department.
3. This will move these fields into the Selected fields view (bottom section of the screen.)
4. Click OK

6.2 A Detailed Query

This example shows a list of employees by Department, Postname, Jobtitle, Annual Pay.

1. Click on the Query button on the toolbar.
2. Select New Query (Button or File menu)
3. Select Query Wizard and press OK
4. Choose Tables (Employee Details and Current Pay Details for example)
5. If choosing more than one table, Click OK when the Join Tables dialogue box appears.
6. Next
7. Choose the fields you wish use in the query (i.e. Department, Postname, Jobtitle, AnnualPay & Surname*)
8. Next
9. No Calculations, Next
10. No Grouping, Next
11. All Rows, Next
12. Natural Order (we will do this manually later), Next
13. Enter a name for the Query.

14. Finish
15. Click on OK to close the Preview Data screen

To Sort the Data in a query

We can then sort the detailed query by the Department and Surname by:
1. Click on the A-Z button in the data tab.
2. Double click on the fields we wish to sort, in this case, Department and Surname.
3. This will move these fields into the Selected fields view (bottom section of the screen.)
4. Click OK

Search - Filtering the data in a query

In this example we will find all the employees who are Managers by searching in the field Jobtitle and searching for all the values which contain the word "Manager".
1. Click on the Search button (Magnifying Glass Icon).
2. Choose the field you wish to filter, i.e. Job Title
3. Click on Operator field and choose "Like" from the list
4. Click on the Value field and type "% Manager". This will only show the managers in the current database.
5. Click OK

NOTE: To remove a field from the Selected Fields, simply double click on it.

6.3 Working with Querys

Once you have saved your query you can open it and manipulate it prior to exporting.

The main benefit of this is that you can group the query by any of the fields used in the query by dragging the field header up into the group area. Then simply click on one of the PLUS (+) symbols down the left hand side of the screen to view the detail.

If you export the query whilst it is grouped it will retain this grouping in Excel

TIP: If you include the employee number within the query you can double click an employees record whilst previewing the data prior to exporting and it will go to the employees record.

6.4 Exporting data into an Excel Spreadsheet.

If you wish to then export this query into MS Excel, simply:
1. Open the Query builder by clicking on the Query button on the toolbar.
2. Click on the query you wish to export and press Select
3. Press the SAVE icon on the Toolbar
4. Choose where you wish to save the spreadsheet
5. Type in a name for the spreadsheet
6. Click SAVE
7. Close the Query Screen.

You can then locate the Spreadsheet and open it to see the exported results of the query.

6.5 Deleting a Query

Simply:
1. Open the Query builder by clicking on the Query button on the toolbar.
2. Click on the query you wish to Delete
3. Press Delete
4. Close the Query Screen

7. Graphs

Personnel Director comes with its own integrated graphing module, so you can create professional-looking charts and quickly tailor graphs for impressive personnel presentations and reports.

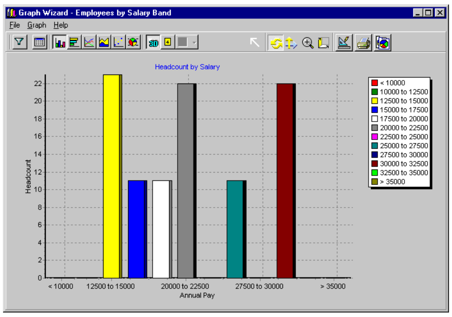
7.1 To display an existing graph:

1. Click on the reports button on the toolbar
2. Expand the Graphs folder
3. Expand the subfolder where your chosen graph is located
4. Double click on the graph you want to view to open the Graph in the Graph Wizard Window.

Note: To return to the Report List, click the window close button in the Graph Wizard window.

7.1.1 About the Graph Wizard Window

When you create or open a graph, the associated data is graphed and displayed in the Personnel Director Graph Wizard window. You can quickly change the type of graph displayed, and its title and axis labels.



If you click in the bar of a bar chart or on the point in a scatter chart, the value will display. For example, if you click the bar representing employees with annual pay between 12500 and 15000 pounds, "Annual Pay: 12500 to 15000" and "Headcount 23" is displayed.

7.2 Working with Graphs

7.2.1 Applying 3-D Effects

You can create or enhance impressive graphs using the 3-D effect. Special effects can also be added using the rotate and depth functions.

To turn on a 3-D effect:
Click the 3-D button on the toolbar.

To rotate a 3-D effect:
Click the Rotate button on the toolbar.

Click and drag in the direction in which you want to rotate the chart until you get the desired effect.

To increase the depth of a 3-D bar chart:
Click the Depth button on the toolbar. Click and drag until you get the desired effect.

TIP: When you work with 3-D and rotated views of complex graphs, you may want to zoom out to get a better overall view and move the resized graph.

To move a graph within the graph window:

Click the Move button on the toolbar.

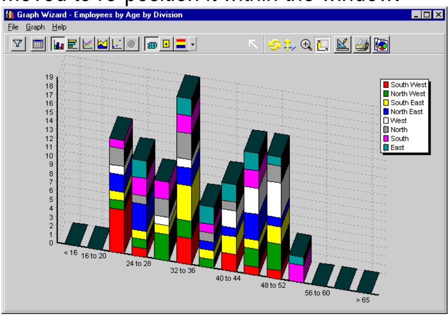
Click and drag to change the position of the graph within the window. This is useful when you have rotated and zoomed a graph and want to adjust the entire grid to centre it within the window.

To zoom the graph:

Click the Zoom button on the toolbar.

Click and drag to zoom in and out.

The following screen illustration shows a rotated 3-D bar graph with added depth. It has been zoomed out and moved to re-position it within the window.



7.2.2 Changing Chart Titles and Adding Markers

You can add, change or remove the top, bottom, and side titles on the chart.

Click the Titles button on the toolbar to open the Edit Titles screen

Do one or more of the following:

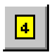
To add or change a title, click in the location (Top, Left, Right, or Bottom) and type the title you want.

To remove a title, click in the location (Top, Left, Right, or Bottom) and delete the title.

Click OK when finished

To add markers to bars, areas, or points on a graph:

Click the Markers button.



The markers show the numbers represented by the graph element.

7.3 Printing the Graph

To print the graph, click the Print button on the toolbar.

To select a different printer or change the print options, click the Printer Setup button in the Preview window.
To change the orientation on the page, click the Portrait or Landscape button.

You can also use the Margin controls to increase or decrease the margins and drag the margin guides to see the effect. Click the View Margins button to turn on and off the display of the margin guides.

Click the Proportional checkbox to position the graph in proportion to the margins and page size.
When you are finished, click Close.

8. Printing Pre-designed reports

Personnel Director comes with many built in reports, which are available to use as soon as you have entered your employee records on to the database.

The following is a quick guide on how to access these built in reports (Creating your own reports is covered on the Advanced training day).

1. Click on the Reports button
2. Click on the + icon to the left of the Reports folder to view a list of sub-folders which contain the built in reports.
3. Click on the + icon to the left of the Personnel Folder and in the right hand window you will see a list of reports relating to personnel such as Headcount reports.
4. Double click on the Headcount by Division Report to view it.
5. Change the Zoom to 75% to see the report more clearly.
6. Use the close button in the top right hand corner of the screen to close the report.

Repeat the above steps to browse through the built in reports to give you an idea on what reports you would like to create.

If the reports in the Personnel Folder do not look very structured, then it is likely that the data in your database is not consistent and therefore you will always have problems with reports and some of the other tools within Personnel Director. For example in the Headcount by Department with Graph, report, you may find that you have many departments, which duplicate each other.

If this is the case, contact Vizual to arrange for a Consultancy day, where a Consultant will visit you and discuss how you can manage your database in order to get the most out of it.

Appendix 1 - Glossary of Terms

DATABASE	Is the equivalent to a filing cabinet, which stores your employee information. You may have more than one database for example, one to store leavers and one to store Current Staff.
RECORD	A record is similar to a file you may keep within a filing cabinet, where you have one file per employee. This is the same with Personnel Director where, each employee has a record for storing his or her details, (for example, Employee Details Screen). Each employee's record is made up of sub-records such as Training History.
SCREEN	Is where we can clearly view the details of an employee's record. This is called the Employee Details screen and only records the current information about each employee.
SUB-SCREEN	In addition to the Employee Details screen, we have Sub-screens, where we can record other information such as Training History or Pay History. These are sometimes referred to as Sub-Records or History Screens.
TABLE	Is where the data is actually stored within the database. Each table has a screen in order to view the details more clearly. You may find that there are extra fields on a table than appears on the screen. These are useful in Filters, Queries and Reports.
FIELD	Where we can add specific data about an employee. For example, the Department field is where we enter which department the employee works within. There are several types of fields, Text fields, Pick List fields etc.
DATA	Data is another word for Information or Details.
FIXED PICK LIST	Is a list of data relevant to a specific field where you cannot add extra items. For example, the Gender Field.
PICK LIST	Is a list of data relevant to a specific field where you can add your own items. For example, Job Title Field. NOTE: These can be set up as Fixed Pick Lists using the Screen designer.
FILTER	To enable you to work with selections of employees when giving pay rises, reviewing absence, or sending letters for example.
QUERY	A tool which enables you to export a selection of employee data into MS Excel for example.
ARCHIVE	When an employee leaves, we can move their record to the another Database which is set up to specifically store leavers. This is called the Archive Database.
USERNAME	The unique name assigned to the person using Personnel Director
WIZARD	A tool which guides you step by step guide through a process of screens
VBT	Vizual Business Tools

Appendix 2 - Contacts

Agathon Consulting ltd

If you have any queries relating to Personnel Director if you require additional training or consultancy, please contact Agathon Consulting by:

Phone: 01242 663974

Email: enquiries@agathonhr.co.uk

Web: http://agathonhr.co.uk