

Staff Files[®]

Version 5.0

User Guide

License Agreement

PLEASE READ THIS DOCUMENT CAREFULLY BEFORE USING THIS SOFTWARE

By using this computer program ("Software"), you agree to become bound by the terms of this License. If you do not agree to the terms of this License, do not use the Software and promptly return the package within 10 days to the place where you obtained it for a full refund.

This Software is licensed, not sold to you (owner of the product) by Atlas Business Solutions, Inc. ("ABS"), for use only under the terms of this License, and ABS reserves any rights not expressly granted to you.

1. Single-user License. This License allows you to:

(a) Use the Software on a single microcomputer at a time, except the Software may be executed from a common disk shared by multiple CPUs provided that one authorized copy of the Software has been licensed from ABS for each CPU executing the Software. ABS does not, however, guarantee that the Software will function properly in your multiple-CPU, multi-user environment. The Software may not be used with any gateways, bridges, modems, and/or network extenders that allow the Software to be used on multiple CPUs, unless one authorized copy of the Software has been licensed from ABS for each CPU executing the Software.

(b) Make one copy of the Software in machine-readable form solely for backup purposes. The Software is protected by United States copyright law. You must reproduce on each copy the copyright notice and any other proprietary legends that were on the original copy supplied by ABS.

2. Multi-user License. This License allows you to:

(a) Use the Software on multiple microcomputers at a time. The maximum number of users is limited to the number indicated on your multi-user license card. The Software may be executed from a common disk shared by multiple CPUs provided that one authorized copy, or license, of the Software has been purchased from ABS for each CPU executing the Software. ABS does not, however, guarantee that the Software will function properly in your multiple-CPU, multi-user environment. The Software may not be used with any gateways, bridges, modems, and/or network extenders that allow the Software to be used on multiple CPUs, unless one authorized copy, or license, of the Software has been purchased from ABS for each CPU executing the Software.

(b) Make one copy of the Software in machine-readable form solely for backup purposes. The Software is protected by United States copyright law. You must reproduce on each copy the copyright notice and any other proprietary legends that were on the original copy supplied by ABS.

3. Restrictions:

You may not distribute copies of the Software to others or electronically transfer the Software from one computer to another over a network and/or zone unless one authorized copy of the Software has been licensed from ABS for each CPU executing the Software. The Software contains trade secrets and to protect them you may not decompile, reverse engineer, disassemble, cross assemble or otherwise change and/or reduce the Software to any other form. You may not modify, adapt, translate, rent, lease, loan, resell for profit, distribute, network or create derivative works based upon the Software or any part thereof.

4. Termination:

This License is effective until terminated. This License will terminate immediately without notice from ABS if you fail to comply with any provision of this License. Upon termination you must destroy the Software and all copies thereof. You may terminate this License at any time by destroying the Software and all copies thereof.

5. Export Law Assurance:

You agree that the Software will not be shipped, transferred, or exported directly into any country prohibited by the United States Export Administration Act and the regulations thereunder nor will be used for any purpose prohibited by the Act.

6. Limited Warranty, Disclaimers, Limitation of Remedies and Damages:

ABS' warranty on the media, including any warranty of merchantability or fitness for a particular purpose, is limited in duration to thirty (30) days from the date of the original retail purchase of this product. After that period, if a disk fails to work or if a disk becomes damaged, you may obtain a replacement disk by returning the original disk. Contact ABS for instructions on obtaining replacement disks.

The replacement warranty set forth above is the sole and exclusive remedy against ABS for breach of warranty, express or implied, or for any default whatsoever relating to the condition of the Software. ABS makes no other warranties or representation, either expressed or implied, with respect to this Software or documentation, its quality, merchantability, performance, or fitness for a particular purpose. As a result, this Software is sold with only the limited warranty with respect to diskette replacement as provided above, and you, the owner, are assuming all other risks as to its quality and performance. In no event will ABS or its developers, directors, officers, employees, or affiliates be liable for direct, indirect, special, or consequential damages (including damages for loss of business profits, business interruption, loss of business information and the like) resulting from any defect in this Software or accompanying documentation or arising out of the inability to use the Software or accompanying documentation even if ABS, an authorized ABS representative, or an affiliate has been advised of the possibility of such damage.

No oral or written information or advice given by ABS, its dealers, distributors, agents, affiliates, developers, directors, officers, or employees shall create a warranty or any way increase the scope of this warranty. Some states do not allow the exclusion or limitation of implied warranties or liabilities for incidental or consequential damages, so the above limitation and exclusion may apply to you. This warranty gives you the specific legal rights, and you may also have other rights that vary from state to state.

7. Copyright Notice:

This Software and accompanying manual (or documentation) are copyrighted with all rights reserved by Atlas Business Solutions, Inc. Under United States Copyright Laws, the Software and its accompanying documentation may not be copied in whole or in part, except in normal use of the Software or to make a backup copy for archival purposes only. Any other copying or selling or otherwise distributing this Software is hereby expressly forbidden.

Staff Files® User Guide

© 2006 Atlas Business Solutions, Inc.

Trademarks

Staff Files and Visual Staff Scheduler® are registered trademarks of Atlas Business Solutions, Inc. Microsoft® and Windows® are registered trademarks of Microsoft Corporation in the United States and/or other countries.

QuickBooks® is a registered trademark of Intuit Inc. in the United States and/or other countries.

All other product names are copyright and registered trademarks/tradenames of their respective owners.

Table of Contents

Chapter 1: Introduction

What You Can Do with Staff Files	2
--	---

Chapter 2: Installing Staff Files

What You Need to Run Staff Files	5
Installing Staff Files	6
To Install a Single-User Version	6
To Install a Multi-User Version	8

Chapter 3: Getting Started -- A Quick Tour

Starting Staff Files	13
Working with Staff Files	15
Menu Bar	15
Tool Bar	15
Tabs	16
Employee List	17
Drop-Down Lists	17
Hot Keys	19

Chapter 4: Setting Up Your Staff Files

Set Up Checklist	21
Setting Up List Items	22
Define Accruals	23
Define Departments	28
Define EEO Categories	28
Define EEO Codes	29
Define Locations	29
Define Positions	30
Define Status	30
Define W-4 Status	31

Wage Type	31
Define Benefit Categories	32
Define Checklist Items	34
Define Evaluation Categories	34
Define Note Categories	35
Define Training and Certifications	36
Edit List Items	37
Delete List Items	38
Changing Field Labels	38
Date Fields	39
Custom Sorts	40
Define a Custom Sort	40
Use a Sort	41
Delete & Edit Sorts	42
Custom Filters	43
Define a Custom Filter	43
Use a Filter	45
Delete & Edit Filters	45
Chapter 5: <i>Entering Employee Information</i>	
Add Employees	47
Import Employee Data from Microsoft Small Business Accounting	48
Import Employee Data from QuickBooks	49
Synchronize Employee Data with QuickBooks	50
Import Employee Data from a Text File	52
Using the New Hire Checklist	53
Add Information to Tabs	54
Enter General Tab Information	55
Enter Emergency Tab Information	56
Enter Wages Tab Information	57
Enter Benefits Tab Information	58
Enter Accruals Tab Information	60
Enter Training Tab Information	63
Enter Evaluations Tab Information	65

Enter Reminders Tab Information	67
Enter Notes Tab Information	68
Enter User Tab Information	69
Enter Documents Tab Information	71
Enter Separation Tab Information	73
Reorganize Employee Records	74
Search for Employee Records	75
Add Employee Photos	76
Delete & Hide Employee Information	77

Chapter 6: *Managing Your Staff Files*

Backup Employee Records	79
Restore & Repair the Staff Files Database	80
Compact Employee Records	81
Set Data Path	82
Manage Security	83
Set Up & View Reminders	85
Set Backup Reminder	86
View Current Reminders	87
Set Up E-mail Reminder	88
Edit Reminder Settings	89
Delete Reminders	90

Chapter 7: *Printing Reminders, Reports, & Letters*

Print Menus & Tools	91
Print	92
Print Preview	92
Printer Setup	94
Print Current Reminders	94
Print Employee Reports	95
To Print with the Print Button	96
To Print with the Report Menu	96
Employee Report Examples	97

Print Staff Reports	99
To Print Staff Reports	99
Staff Report Examples	100
Print Birthday Reports	101
Print Phone Lists	102
Print Employee Lists	103
Print Microsoft Access Reports	104
Print Mailing Labels	105
Create & Publish Letters	106
To Create/Edit Letters	107
To Publish Letters	110
Index	113

About this Guide

The Staff Files User Guide is written for end-users who have a need to enter, maintain, and update confidential employee information.

The focus of this guide is on how to use the Staff Files program. The best way to quickly become familiar with this program is to review the first three sections of this guide.

1. Review the “Introduction” section.

The introduction pages provide a basic description of Staff Files features and functions.

2. Install Staff Files.

The “Installing Staff Files” section explains how to use the Setup program to install the software. You can install Staff Files for use with Windows 95 or higher. The section covers installation for both single- and multi-user versions.

3. Take the quick tour in “Getting Started -- A Quick Tour.”

This section is an overview of how to use the Staff Files features presented in simple step-by-step instructions.

Finally, start using Staff Files. When you need more detailed information, refer to the remaining chapters in this guide.

This user guide assumes you are already familiar with Microsoft® Windows 95 or higher and MS-DOS® operating systems. It also assumes you know and understand the basics of operating a mouse. If you need more information about Windows, MS-DOS, or operating a mouse, please refer to their respective manuals.

User Guide Conventions

The following conventions are used in this user guide:

Menu names and commands are shown in bold type with the underlined letter used to invoke a menu or command in combination with the Alt key. For example:

Click on **File** and select **Backup**.

Notes are used to point out information of special interest, or program information of which you should take notice. For example:

Note: Photos should have been scanned and saved in a .bmp or .jpg format.

Step-by-step instructions are clearly demonstrated with numbered sentences. For example:

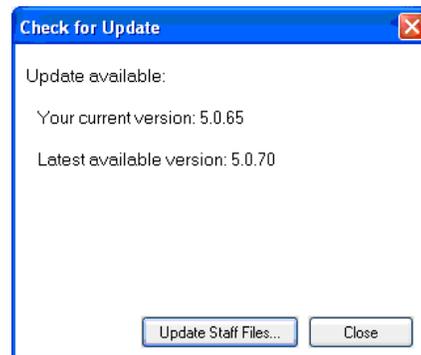
To Change a Field Label:

1. Go to the tab that contains the label you want to change. For example, click the **General** tab.
2. Place the cursor on the **Department** label and double-click.

Getting Help

When you need help with a specific function, command, or procedure, select **Help** from the Staff Files menu bar. For additional information about any of the elements that appear in the Help screen, point to the term or element and double-click the left mouse button.

The **Help** menu also allows you to check for updates to the Staff Files program. The most recent Staff Files updates are posted to the ABS web site, and can be downloaded by selecting **Help® Check for Updates**. The update may take several minutes to complete. Before beginning, you must close down all open Staff Files applications, and make sure multiple users are *not* logged in at the time. When the update begins, your Staff Files application will automatically close.



Technical Support

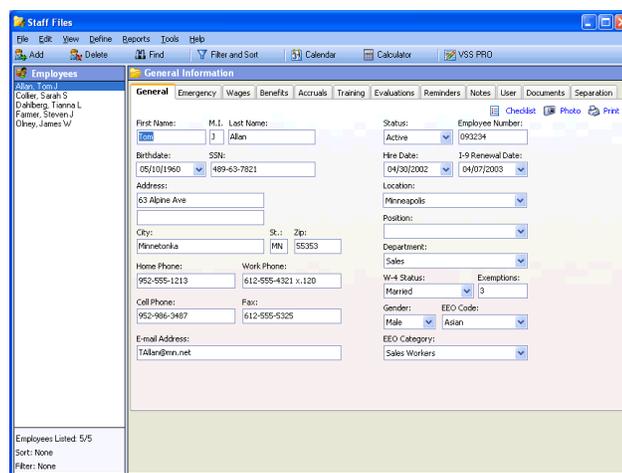
We're here to help you...

If you can't find the answer to your question after consulting **Help**, contact Technical Support by e-mail at **support@asiAbility.com** during UK office hours of 9:00 am to 5:30 pm.

Chapter 1: Introduction

The Staff Files program is a flexible system for the storage and retrieval of important, confidential personnel information. Staff Files is an electronic filing system that uses a familiar interface—folder tabs. Through its quick-tab navigation system, you can easily and quickly find personnel information.

With the Staff Files system, record keeping becomes effortless. You can easily store the information you need, from employee names, addresses, and phone numbers to performance evaluations, benefits packages, and vacation time accruals. In fact, you can store just about anything because Staff Files lets you define the type of information you want to keep.



What You Can Do with Staff Files

Here are some examples of how you can use Staff Files:

- The all-new Auto Accruals wizard feature uses Accrual Accounts and Accrual Policies to provide a simple solution for setting up and tracking accruals, such as vacation and sick time, automatically.
- Enter and update employee data using text file imports.
- More improvements to the user interface make using and navigating Staff Files even easier.
- Now you can segment security access by department and provide managers access to their department-specific Staff Files information.
- Ready-to-use templates now included for evaluation forms, new hire checklists, and more. Use them as is, or modify them as needed.
- Training and Certification can now be tracked in its own tab.
- Create repeating reminders that appear in a pop up when you open Staff Files and inform you of important dates and details, such as birthdays, certification expirations, and I-9 renewals.
- Create, edit, and publish letters for benefit notifications and other communications.
- Check which benefits employees are enrolled in, and when they will become eligible for additional benefits.
- Protect your Microsoft Access database from inappropriate viewing by creating a password for it in Staff Files.

- Record general employee information—social security number, EEO code and category, hire date, position, and W-4 status.
- Keep employee emergency information readily available—contact name and number, physician name and number, even special notes.
- Define your own list box items for tab information fields—the user-definable field labels and lists let you customize Staff Files to best fit your needs.
- Automatically remind yourself of important dates like performance evaluations and training seminars.
- Print mailing labels and phone lists.
- Restrict access to confidential information with read-only passwords.
- Import employee photos and other important documents such as I-9 forms, licenses, and resumes.
- Track wage histories and current pay rates.
- Complete thorough performance evaluations by scoring employees on categories, such as availability and job knowledge, and include detailed comments.
- Organize employees by department, or by location, if you're maintaining information for multiple facilities.
- Prepare over 20 different reports including the birthday and employment anniversary reports.

Chapter 2:

Installing Staff Files

This chapter describes how to install Staff Files to run under Windows 98/2000/NT/XP/Vista.

What You Need to Run Staff Files

The minimum software and system configuration you need to run Staff Files includes:

- A personal computer with an Intel® Pentium® Processor (75+ MHz) and at least 40 MB of memory.
- One CD-ROM drive and a hard disk, with at least 60 MB of free disk space for program files, plus additional disk space for personnel data files.
- One of the following PC operating systems: Windows 98/2000/NT/XP/Vista.
- A mouse supported by Microsoft Windows is recommended.
- A compatible monitor supported by Microsoft Windows. (Staff Files supports VGA and Super VGA monitors; however, a SVGA monitor is recommended.)
- An optional printer supported by Microsoft Windows.

Installing Staff Files

We recommend that you close all applications, including screen savers or similar programs, before running the Setup program. The Staff Files setup program creates a Windows program group named ABS Applications, and inserts the Staff Files icon.

For multi-user versions, please refer to the instructions on page 8.

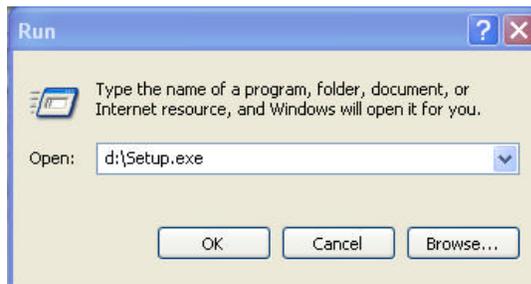
To Install a Single-User Version of Staff Files:

Follow the instructions listed below to install Staff Files using Windows 95 or higher.

1. Place the Staff Files CD in your computer's CD-ROM.

If the Setup program doesn't initiate automatically, use the following instructions.

2. Click on the **Start** button.
3. Select **Run** from the **Start** menu. The **Run** dialog box appears.



4. Type **d:\setup.exe** in the dialog box (use the appropriate drive letter for your CD-ROM).
5. Click **OK** or press the **Enter** key.

NOTE: The Setup program will not run automatically if it either detects that Staff Files is already installed on your PC, or if Autorun is inactive.

6. When Staff Files displays the **Setup Welcome** click **Next** to continue.
7. Review the **License Agreement** and click **Next** to accept it.
8. In the **Select Destination Directory** window, browse the folder list to select a destination, if needed.

The Setup program will install Staff Files software to the directory c:\Program Files\StaffFile. It will automatically create the directory on your hard disk, if you haven't done so already.

NOTE: The corresponding database(s), PswdE.txt, PswdS.txt, IMG folder, and SFletters folder will be located in c:\Documents and Settings\All Users\Documents.

9. Click **Next** to continue. Staff Files starts copying the program files to the designated directory and updates the system configuration.

The Setup program notifies you that Staff Files has been successfully installed. The Setup program automatically adds Staff Files to **Start** ® **Programs** ® **ABS Applications** group.

10. Click **Finish** and the Setup program will add a Staff Files shortcut to your desktop before closing.

To Install Multi-User Versions of Staff Files:

If you purchased a multi-user version of Staff Files, install the software on each individual workstation. First, make sure you have a network and a need to share data between several workstations. If you do not have a network or a need to share data across several workstations, use the Setup programs. To use the Setup programs refer to the note that follows this section.

NOTE: Be sure you have “Administrator” rights to install the application to the network.

Network Server Installation:

1. Insert the Staff Files CD into your CD-ROM.

The program should run automatically. If not, continue with the following steps.

2. Click the **Start** button.
3. Select **Run** from the **Start** menu. The **Run** dialog box appears.

5. Type **d:\nsetup.exe** in the dialog box. (Substitute the “d:” drive for the appropriate drive letter of your CD-ROM drive if different.)
6. Click **OK** or press the **Enter** key.
7. Read the **License Agreement**, then click **Next** to accept it.
8. Enter the network drive and directory where you want the program installed and click **Next** .
9. At the **Start Installation** screen, click **Next** . The NSetup programs will copy the application files along with a workstation setup program to the specified network drive.
10. Click **Finish** after Staff Files is successfully installed, and the NSetup program will close.

Go to the workstation where you want to install the workstation setup files. Make sure you are logged in as “Administrator” or have rights to install the application, and continue with Client Workstation Installation instructions that are listed next.

Client Workstation Installation:

1. At the client workstation, click the **Start** button and select **Run**.
2. In the **Run** dialog box, type **f:\...\wksetup**. (Substitute the “f:” drive with the appropriate network drive and directory where Staff Files was installed. This is the same directory and pathname that was used previously for the network installation.)

3. Click **OK** or press the **Enter** key.

This installs all required dependency files on the workstation, as well as creates icons for program startup. The “wksetup” program automatically adds Staff Files to **Start® Programs® ABS Applications** group.

Using Your Own Database:

If you have your own database, and wish to use it instead of the one in your StaffFiles folder, both Single-user and Multi-user versions will complete the following:

1. Rename the databases in the StaffFiles folder on your computer to **Empf_Old.mdb** and **Samp_Old.mdb**.
2. Copy **PswdE.txt**, **PswdS.txt**, **IMG folder**, and **SFLetters folder** to the server, if they are not already on the server.

The next time you start Staff Files, you’ll be asked to locate the database. Simply, direct Staff Files to the one on the server.

NOTE: Whenever the Staff Files database is moved from the default location to another location, users must also move PswdE.txt, PswdS.txt, IMG folder, and SFLetters folder into the same folder as the Staff Files database.

Important Information About Network Installations:

If you purchased a Staff Files multi-user license but do not have a network or you do not wish to install the multi-user version on a network, you can install the software on as many workstations as you have licenses. The only legal requirement is that you must install all copies within the same company. You cannot purchase a single copy of the multi-user version and install it at more than one company.

As an option, you can install a complete copy of the software on individual workstations using the appropriate Setup program. For installation instructions refer to page 6 - “To Install a Single-User Version.” You may want to use this option when a user does not want to boot their system from the network, or they want to be able to run Staff Files if the network server is not available. In this situation, data can still be accessed.

You are ready to begin. Review the next section, “Getting Started—A Quick Tour,” to learn more about using Staff Files software.

Chapter 3:

Getting Started

A Quick Tour

This chapter describes how to start up the Staff Files program and use Staff Files menus, quick-action buttons, and quick-tabs.

Starting Staff Files

The Staff Files program provides an easy-to-use, intuitive interface. Its design is based on something you are already familiar with—file tabs. The file tabs presented in Staff Files allow you to enter, view, and edit information about your personnel. You can also customize the information you need to keep track of in each tab.

To Start Staff Files:

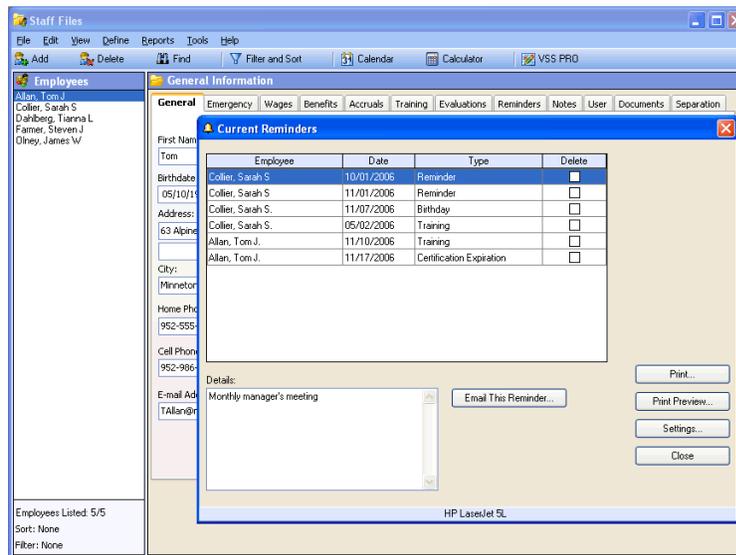
1. Start Staff Files by clicking on **Start** and selecting **Programs® ABS Applications® Staff Files**.
2. If this is the first time you've used Staff Files, you will see a **Registration** dialog box. Select the appropriate choice, and follow the instructions.
3. Click **OK** to continue.

4. Next, Staff Files displays a dialog box asking if you want to use **Sample data** or **Live data**.
5. Click the **Sample data** button.



The Staff Files program screen appears with **Current Reminders** at the front. You can see how the reminders you set will be displayed. Setting up, deleting, and printing reminders is covered in Chapter 6 of this user guide.

6. To close reminders, click the **Close** button.



The sample data is now available for the following tour of your Staff Files program.

Working with Staff Files

Menu Bar:



At the very top of the program screen is the menu bar. From the menu bar you can perform functions like defining your own list box items for the information fields, setting reminders, and printing reports.

Tool Bar:



Directly below the menu bar is the tool bar containing the quick-action buttons. Pass your cursor over the buttons to see how the **Tool Tips** display the specific function of each button.

The **Add** button allows you to add employees to your database.

The **Delete** button lets you delete employees and information from your database.

The **Find** button allows you to search for a specific employee by name, social security number, or employee number.

The **Filter and Sort** button allows you build your own filters to increase viewing and reporting options. You can combine filters with different sorts to narrow data into specific categories or groups.

For example, you could sort your staff by hire date, and further condense with a filter to include only those hired after 1/1/2000.

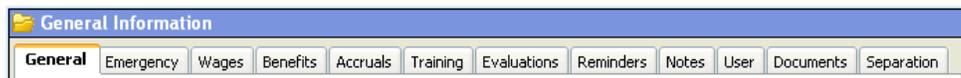
The **Calendar** button gives you access to a handy calendar for referencing dates. (You'll find this same tool in date information fields.)

The **Calculator** button gives you a pop-up calculator you can use at any time.

Click this button to launch **Visual Staff Scheduler PRO**.

Visual Staff Scheduler PRO is a fast, easy, and flexible program designed to take the complexity out of scheduling. One, easy-to-use interface makes it simple! Visit the ABS Online website, or call 1-701-235-5226 for more details.

Tabs:



Below the tool bar's quick-action buttons, you'll find twelve quick-tabs. The first tab displayed, at the far left, is the **General** tab.

The **General** tab has several information fields, such as **First Name**, **Last Name**, **Birthdate**, **Address**, etc. After adding an employee, you just type the information into these fields.

Click the other tabs to see the other types of employee information you can keep. When you are finished looking at the other tabs, click the **General** tab again.

Employee List:

Employees
Allan, Tom J
Collier, Sarah S
Dahlberg, Tianna L
Farmer, Steven J
Miller, Dan I
Olney, James W
Stinson, Tracy

Employees Listed: 7/7
Sort: None
Filter: None

At the far left of the screen, you'll see a list of employee names. This list gives you a view of your personnel roster at all times. You can also use the employee list to retrieve information you've entered in the quick-tabs.

You can use filters and sorts to arrange the list in a category or group for easy reference.

Click an employee name. Notice how your **General** tab now displays the information for this employee.

Drop-down Lists:

Status:

Active	▼
Active	
Inactive	
Terminated	

Notice the information fields in the **General** tab that have a drop-down arrow next to them, such as **Status** and **EEO Code**. The drop-down arrow indicates you can select an item from a drop-down list.

Five information fields have lists of the most commonly used items already defined for you. For example, the **EEO Code** list box items already defined are "African American," "Asian," "Hispanic," "Native American," and "White."

You also have the ability to define your own list box items. Now, using **Status** for an example, you may decide to include maternity leave in your list of status choices.

To see how the items in drop-down lists are defined, follow these steps:

1. Click the **Define** menu.
2. Select **Status**.
3. Click the **A**dd button and a new line is displayed.
4. Click in the new line and enter “Maternity.”
5. Click the **C**lose button.
6. In the **G**eneral tab, click on the drop-down arrow for the **Status** field. “Maternity” now appears in the list.



The **Define** menu allows you to define items for the following: **Accrual Accounts, Department, EEEO Category, EEEO Code, Location, Position, Status, W-4 Status, Benefit Categories, Evaluation Categories, Note Categories, Reminder Settings, Sorts, Filters, and Backup Reminder.**

Hot Keys:

Hot Keys give you the ability to navigate through your Staff Files database using your keyboard. This is done by using a letter in combination with the **Alt Key**. Menu names and commands with **Hot Keys** are shown in bold type with the underlined letter needed.

1. Push the **Alt Key**. The underlines are displayed.
2. For example, Alt + D opens your **Define** menu.

NOTE: When the same letter is used for different items, (**EE**O** Code** and **EE**O** Category**) simply continue selecting the letter until you reach the item you're looking for.

This completes a quick tour of the Staff Files program. From this quick tour you have learned how:

- The quick-action buttons are used to maintain the employee database and to print employee records.
- The quick-tabs contain employee information in eleven different categories.
- The **Define** menu is used to define items you can customize to your needs.

For more detailed information on how each of the Staff Files functions operate, refer to the following chapters in this user guide.

Chapter 4:

Setting Up Your Staff Files

This chapter describes how to set up user-defined items, change information field labels, and define custom sorts and filters. Start Staff Files by clicking on **Start** and selecting **Programs** ® **ABS Applications**® **Staff Files**. When the dialog box appears, select **Live data**.

Set Up Checklist

As you build your Staff Files database, follow the steps outlined below:

- Chapter 4* **Set up user-defined items**
 - List Box Items
 - Field Names
 - Sorts
 - Filters
- Chapter 5* **Enter employee information**
 - Add employees
 - Add employee information to tabs
- Chapter 6* **Set reminders**
 - Manage security**
- Chapter 7* **Print reports**
 - Employee Reports
 - Staff Reports

Setting Up List Items

Before entering employees and their information, you may want to define the items specific to your company in the following tabs:

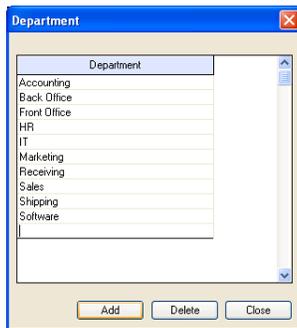
- **General**
- **Benefits**
- **Accruals**
- **Evaluations**
- **Notes**
- **User**

The items you define are displayed in each of the lists that appear in the tabs. An example of an information field in the **Evaluations** tab with such a list is **Evaluation Categories**. In the **Evaluations** tab, you will enter performance scores and notes for the evaluation categories you select or define.

Staff Files has some of the most commonly used items already defined for you in the various information fields. For example, in **Evaluation Categories** you will find nine categories pre-defined, including Initiative and Reliability.

By simply adding and deleting, you can personalize the drop-down lists in the information fields. Each window utilizes Add or Delete buttons that you'll use to define the information required to meet your specific company needs.

See the the Department window pictured below as an example.



Before entering employees and their information, you want to define list items specific to your company using the **Define** menu. The items you define will appear in the drop-down lists of the appropriate tabs.

- **Accruals**
- **Department**
- **EEO Category**
- **EEO Code**
- **Location**
- **Position**
- **Status**
- **W-4 Status**
- **Wage Type**
- **Benefit Categories**
- **Checklist Items**
- **Evaluation Categories**
- **Note Categories**
- **Training/Certifications**

Define Accruals:

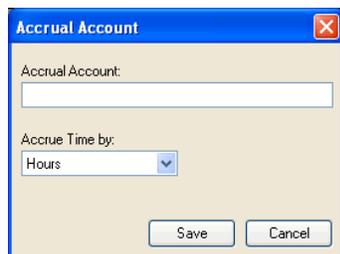
The **Accruals** quick-tab allows you to track accrual accounts like vacation time, sick leave, comp time, and overtime. **Accruals** calculates and keeps a running balance of the amount (hours, days, etc.) entered.

Accrual Accounts work with **Auto Accrual Policies** to automatically calculate time accruals for all employees enrolled in auto accruals.

To set up **Accrual Accounts** you must first identify the accounts you'll be using. "Vacation" and "Sick Leave" are already defined for you, but you may want to add "Overtime." You can define as many accruals as you need for your company.

To add an accrual account:

1. From the **Define** menu, select **Accruals** and **Accrual Accounts**. The **Accruals Accounts** window is displayed.
2. Click the **Add** button and a new **Accrual Accounts** window is displayed.



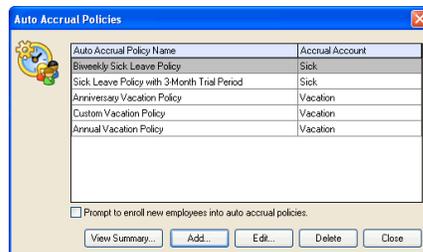
3. Enter the **Accrual Account** title or name and select how the time will be accrued: **Hours** or **Days**.
4. Click **Save**.

You can set up **Auto Accrual Policies** to apply accruals to employees based on hire date, trial periods, and seniority. The **Auto Accrual Policies wizard** walks you through a series of questions and uses your answers to set up the auto calculations.

When you have inactive employees, you can use an **Inactive Auto Accrual Policy** to temporarily withhold employee accruals during the inactive period. When this policy is in effect, no auto accruals will be posted for the employees assigned the custom policy.

To add an auto accrual policy:

1. From the **Define** menu, select **Accruals > Auto Accrual Policies** to display the **Auto Accrual Policies** window.



2. Click the **Add** button and the **Auto Accrual Policy wizard** opens.
3. Enter the **Accrual Account Policy Name**, such as Vacation / New Hires, and click **Next** to continue.
4. Select the **Accrual Account** this policy is posted to, such as Vacation. If the **Accrual Account** does not appear in the drop-down list, click the **Add New** button to define the account required.

5. If the policy you're adding is based on existing policy, select the existing policy from the drop-down list and click **Next** to continue.

NOTE: This selection is optional. The advantage to basing new policies on existing policies is that Staff Files populates the new policy with all information from the existing policy. When you have minor adjustments to make, this saves you the time of re-entering each and every policy item, and instead you make only the necessary adjustments.

6. Select the **Accrual Period**, or the frequency with which time is accrued for this policy, and click **Next** to continue. For example, weekly accruals will post accrued time to enrolled employees at the end of each week.
7. Select the time that identifies the start of the accrual year. **When will an accrual year begin?** could be a particular month or the anniversary of the hire date.

NOTE: Staff Files processes time carryovers each accrual year on the first day of the month selected, or on each anniversary of the date the employee was hired.

8. Define the first year **Accrual Rates** for the new policy. This applies when employees who have been with the company for less than one year will accrue time at a different rate than those employed for more than one year.
9. If your policy will use a **Trial Period**, select the appropriate trial period length. This often applies to newly hired employees.

NOTE: During a trial period employees will accrue time, but it will not be awarded until after the trial period is completed.

10. Mark the **Reset Option** when the new policy resets the accrual balance at the end of the accrual year. For example, policies that enforce “use-it-or-lose-it” rules would reset to zero at the end of the accrual year.
11. Use the **Seniority Table** to define the time amounts each employee enrolled in the new policy will receive based on their length of employment.
 - To use the seniority table:
 1. Click the **Add** button to add a seniority record.
 2. Enter the **number of years of service** required.
 3. Enter the **number of days or hours** to be accrued each month.
 4. If applicable, enter the **maximum amount of unused time** that will be carried over in the next year.
 5. Enter the **maximum number of days to be accrued**, or select N/A if this is not applicable, and click **Save**.
12. Click **Next** to display the **Accrual Policy Summary**, where you can review or print your selections before completing the wizard.
13. Click **Finish** to save the new Accrual Account Policy.

Define Departments:

Use the **Department** information field in the General tab to define departments, such as “Marketing,” “Sales,” and “Administration.”

To add a department:

1. From the **Define** menu, select **Department**. The **Department** window is displayed.
2. Click the **Add** button in the **Department** dialog box. A new line is displayed.
3. Enter the new department name.
4. Click **Close** when you are finished entering department names.

Define EEO Categories:

The **EEO Category** information field in the General tab allows you to enter EEO categories for Equal Employment Opportunity tracking. You’ll find ten categories defined for you, such as “Apprentice” and “Professionals.”

To add an EEO category:

1. From the **Define** menu, select **EEO Category**. The **EEO Category** window is displayed.
2. Click the **Add** button in the **EEO Category** dialog box. A new line is displayed.

3. Enter the new category name.
4. Click **Close** when you are finished entering new category names.

Define EEO Codes:

The **EEEO Code** field in the General tab allows you to enter EEO codes for Equal Employment Opportunity tracking. The codes defined for you include “African American” and “Hispanic.”

To add an EEO code:

1. Click the **Define** menu and select **EEEO Code**. The **EEO Code** window is displayed.
2. Click the **Add** button in the **EEO Code** dialog box. A new line is displayed.
3. Enter the new code name.
4. Click **Close** when you are finished entering new code names.

Define Locations:

If you have employees working in different locations or facilities, the **Location** field in the General tab allows you to identify the workplaces.

To add a location:

1. Click the **Define** menu and select **Location**. The **Location** window is displayed.

2. Click the **Add** button in the **Location** dialog box. A new line is displayed.
3. Enter the new location.
4. Click **Close** when you are finished entering new locations.

Define Positions:

If you have different employee position titles, the **Position** field in the General tab is where you will record an employee's position.

To add a position:

1. From the **Define** menu, select **Position**. The **Position** window is displayed.
2. Click the **Add** button in the **Position** dialog box. A new line is displayed.
3. Enter the new position.
4. Click **Close** when you are finished entering new positions.

Define Status:

The **Status** field in the General tab allows you to enter the current status of employees, such as "Active" and "Inactive."

To add a status:

1. From the **Define** menu, select **Status**. The **Status** window is displayed.

2. Click the **Add** button in the **Status** dialog box. A new line is displayed.
3. Double-click the highlighted line and type the new status.
4. Click **Close** when you are finished entering each new status.

NOTE: Click the **Hide** checkbox if you want to keep employees of a particular status out of your reporting.

Define W-4 Status:

The **W-4 Status** field in the General tab allows you to enter W-4 information. “Single,” “Married,” “Married, but withhold at higher rate,” and “Exempt” are defined for you.

To add a W-4 status:

1. From the **Define** menu, select **W-4 Status**. The **W-4 Status** window is displayed.
2. Click the **Add** button in the **W-4 Status** dialog box. A new line is displayed.
3. Enter the new W-4 status.
4. Click **Close** when you are finished entering each new status.

Define Wage Type:

The **Wage Type** field in the Wages tab will list each wage type you define, such as “Hourly” or “Salary.”

To add a wage type:

1. From the **Define** menu, select **Wage Type**. The **Wage Type** window is displayed.
2. Click the **Add** button in the **Wage Type** dialog box. A new line is displayed.
3. Enter the new wage type.
4. Click **Close** when you are finished entering each new wage type.

Define Benefit Categories:

Benefit Categories are displayed in the Benefits tab. You will define the benefits offered by your company, and the length of time before an employee is eligible to receive each benefit. There are five categories defined for you: “401(k),” “Dental,” “Health,” “Life,” and “Vision”.

To set eligibility for defined benefits:

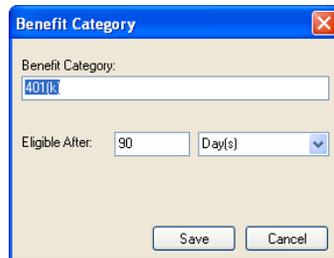
1. From the **Define** menu, select **Benefit Categories**. The **Benefit Categories** window is displayed.
2. Select the benefit to identify eligibility and click the **Edit** button.
3. In the **Eligible After** line, enter a number and select from the drop-down list: **days**, **weeks**, **months**, or **years**. For example, enter “90” and select “days” to indicate eligibility after 90 days of employment.
4. Click **Save**.

5. Select whether it will apply to **Existing and New employees** or **Only New employees**.
6. Repeat as needed for other benefits and click **Close** when you are finished.

NOTE: These dates can be changed at any time.

To add a benefit:

1. Click the **Define** menu and select **Benefit Categories**.
2. Click the **Add** button in the **Benefit Categories** dialog box. A new, **Benefit Category** window is displayed.



3. Enter the new **Benefit Category**.
4. In the **Eligible After** field, enter a number and select from the drop-down list: **days, weeks, months, or years**.
5. Click **Save**.

6. Select whether it will apply to **Existing and New employees** or **Only New employees**.
7. Repeat as needed for other benefits and click **Close** when you are finished.

Define Checklist Items:

You can customize the **New Hire Checklist** to match your requirements for covering the necessary procedures and documents with new employees. Examples could include:

- **Background check**
- **Reference check**
- **Direct Deposit enrollment**
- **Orientation tour**

To define checklist items:

1. From the **Define** menu, select **Checklist Items**.
2. Click the **Add** button in the **Checklist Items** dialog box. A new line is displayed.
3. Enter the new **Checklist Item** name.
4. Click **Close** when you are finished entering checklist items.

Define Evaluation Categories:

Evaluation Categories appear in the Evaluations tab. The categories you define are used for the evaluation of personnel during performance

reviews. You'll find nine categories defined for you, such as "Productiveness" and "Dependability."

To add a category:

1. Click the **Define** menu and select **Evaluation Categories**. The **Evaluation Categories** window is displayed.
2. Click the **Add** button in the **Evaluation Categories** dialog box. A new, highlighted line appears.
3. Enter the new category.
4. Click **Close** when you are finished entering new evaluation categories.

Define Note Categories:

The **Notes** tab is designed to keep miscellaneous information about employees. You'll find six categories defined for you, such as "Education" and "Training."

To add a category:

1. Click the **Define** menu and select **Note Categories**. The **Note Categories** window appears.
2. Click the **Add** button in the **Note Categories** dialog box. A new line is displayed.

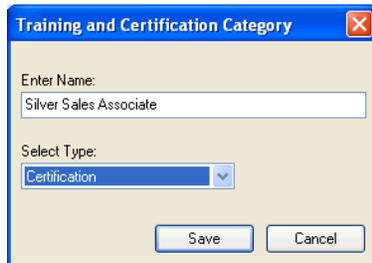
3. Enter the new note category.
4. Click **Close** when you are finished entering new note categories.

Define Training and Certifications:

The **Training** tab will help you track training and certifications your employees may be required to attend or keep current, such as CPR certification or product training sessions.

To add a training or certification:

1. From the **Define** menu, select **Training/Certifications**.
2. Click the **Add** button in the **Training and Certification Category** dialog box. A new, **Training and Certification Category** window is displayed.



The screenshot shows a dialog box titled "Training and Certification Category". It has a standard Windows-style title bar with a close button (X) in the top right corner. The dialog contains two input fields. The first is labeled "Enter Name:" and contains the text "Silver Sales Associate". The second is labeled "Select Type:" and is a dropdown menu currently showing "Certification". At the bottom of the dialog are two buttons: "Save" and "Cancel".

3. Enter a title for the new category.
4. Select **Training** or **Certification** from the drop-down list.
5. Click **Save**.

6. Repeat as needed for other training or certifications and click **Close** when you are finished.

NOTE: Deleting a training or certification will delete all associated employee records for that training or certification.

Edit List Items:

You can edit list items at any time using the following procedures.

To edit list items with an Edit button:

1. From the **Define** menu, select the location of the list item to be changed.
2. Select the item you're changing from the list and it becomes highlighted.
3. Click **Edit**.
4. Make necessary changes and click **Save**.
5. Click **Close**.

To edit list items without an Edit button:

1. From the **Define** menu, select the location of the list item to be changed.
2. Select the item you're changing from the list and it becomes highlighted.

3. Click **Delete**.
4. Click **OK**, and click **OK** again.
5. Follow procedure to define a new list box item that will have the modified information.

Delete List Items:

The **Delete** button is at the bottom of each dialog box.

To delete list items:

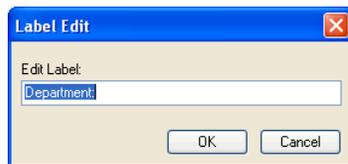
1. Click the **Define** menu and select the location of the list item to be deleted.
2. Select the item you're deleting from the list and it becomes highlighted.
3. Click **Delete**.
4. Click **OK**, and click **OK** again.

Changing Field Labels

Staff Files provides additional flexibility for customizing your employee records by enabling you to change the field labels that appear in the tabs. For example, you may want to change the **Department** label that appears in the **General** tab, to "Division" or "Regional Office."

To change a field label:

1. Click the tab containing the label you want to change.
2. Place the cursor on the label and double-click. The **Label Edit** dialog box is displayed.



3. Type a new label in the text box.
4. Click **OK**.

The new label will now appear in the tab and in the **Define** menu, and the new label has its own hot key when you push the Alt Key.

NOTE: After making this change, use the **Define** feature to edit the options that appear in the drop-down list, if appropriate.

Date Fields

Date information fields (Birthdate, Hire Date, Next Review Date, etc.) have a **Calendar** button.

To enter a date:

1. Click the **Calendar** button to display the calendar.

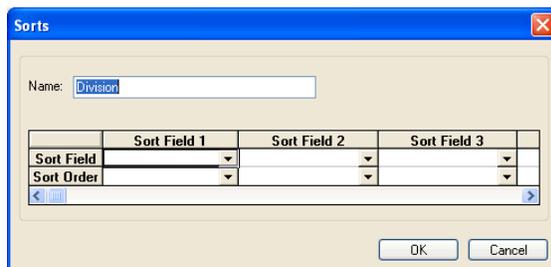
2. Use the arrows at the top to scroll to the appropriate date.
3. Select the date by double-clicking, and it will be entered in the field.

Custom Sorts

Staff Files allows you to set the order that employee names appear in the employee selection lists and on reports. Staff Files has defined four sorts for you: "Hire Date/Seniority," "Location," "Job/Position," and "Active Employees." You can define up to six additional sort fields. Your sorting choice can be applied at any time.

Define a Custom Sort:

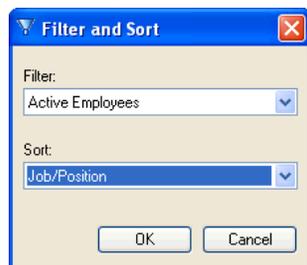
1. Click **D**efine from the menu bar and select **S**orts.
2. Click **N**ew in the **S**ort dialog box to display a "worksheet" of fields for defining new sorts.



3. Enter a name for your new sort in the **Name** box. This name appears in the drop-down list when you select **Filter and Sort** from the **View** menu.
4. In the **Sort Field 1** column, use the drop-down list to select the Sort Field you want to use as your primary field.
5. In the same column, select how you want the records sorted in the **Sort Order** drop-down list: **Ascending** or **Descending** order.
6. If necessary, continue defining up to five additional sort fields in the remaining columns.
7. Click **OK** when finished, then click **OK** again.

Use a Sort:

1. From the **View** menu, select **Filter and Sort**, or click the **Filter and Sort** button in the tool bar. The **Filter and Sort** dialog box is displayed.



NOTE: This allows you to apply both a filter and sort at the same time, if desired.

2. Click the drop-down arrow, and select the desired sort.
3. Click **OK**.

Delete & Edit Sorts:

The **Delete** button and **Edit** button are located in the **Sort** dialog box.

To delete a sort:

1. Click **D**efine from the menu bar and select **S**orts.
2. Select the sort you no longer need in the list and it becomes highlighted.
3. Click **Delete**.
4. Click **OK**, and click **OK** again.

To edit a sort:

1. Click **D**efine from the menu bar and select **S**orts.
2. Select the sort you need to edit and it becomes highlighted.
3. Click the **Edit** button, and the “worksheet” is launched for making changes.
4. Click **OK** and click **OK** again.

Custom Filters

Staff Files allows you to build your own filters to enhance reporting capabilities. You can combine filters with different sorts to further increase your reporting capabilities. For example, you could sort your staff by hire date, and include only those hired after 1/1/2000 with a filter. These filters are defined for you: “Active Employees,” “Inactive Employees,” and “Terminated Employees.”

Defining a filter requires you to:

- Select a **Filter Field** - You will select this from the list of information fields that appear in your Staff Files tabs.
- Select an **Operator Command** - Operators include: AND, OR, >, <, >=, <=, +, -, LIKE, IN, and DATE().
- Identify the **Variable Data** - You will type in the data you want to filter. For example, to filter only managers, you would type “Manager.”

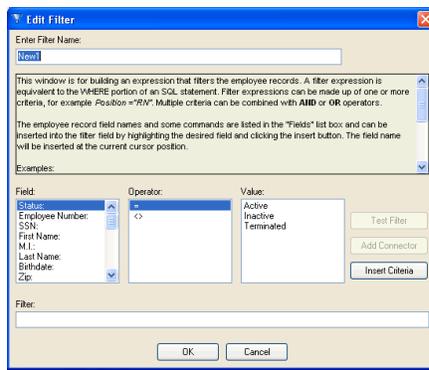
Define a Custom Filter:

1. Click the **Define** menu and select **Filters**. The **Filters** dialog box is displayed.



2. Click **New** to create a new filter.

3. Enter the name of the new filter in the **Name** field of the **Edit Filter** dialog box. This name appears in the drop-down list when you select **Filter and Sort** from the **View** menu.



4. Select an information **Field** from the fields list box on the left. The **Field** you selected appears in the **Filter** text box at the bottom of the dialog box.
5. Select an **Operator** from the list of operators on the right. The **Operator** you selected now appears in the **Filter** text box at the bottom of the dialog box along with the Filter.
6. Select a **Value** from the list of values on the right. The **Value** you selected now appears in the **Filter** text box at the bottom of the dialog box along with the Filter and Operator.
7. Click **Insert Criteria** to enter the Filter you defined. For example, the filter could be Department (Field) equals (Operator) Sales (Value).

8. Click **Test Filter** to check your work. If you have defined your filter correctly, you will receive an OK message.
9. Click **Add Connector** if you need to include **OR** or **AND** to the filter you're creating and make your additions.
10. Click **OK**, then click **OK** again.

Use a Filter:

1. Click the **Filter and Sorts** button in the tool bar or from the **View** menu, select **Filter and Sort**, where you can apply both at the same time, if desired.
2. Click the drop-down arrow, and select the desired filter.
3. Click **OK**.

Delete & Edit Filters:

The **Delete** button and **Edit** button are in the **Filter** dialog box.

To delete a filter:

1. Click the **Define** menu and select **Filters**.
2. Select the filter you no longer need in the list and it becomes highlighted.
3. Click **Delete**.
4. Click **OK**, and click **OK** again.

To edit a filter:

1. Click the **D**efine menu and select **F**ilters.
2. Select the filter you need to edit and it becomes highlighted.
3. Click the **E**dit button, and the **E**dit Filter box is launched for making changes.
4. Click **OK** and click **OK** again.

Chapter 5:

Entering Employee Information

This chapter describes how to add employees, use the new hire checklist, import employee data from Microsoft Small Business Accounting or QuickBooks, enter employee information, delete employee information, reorganize employee records, search for employee records, and add employee photos.

Add Employees

Before you enter information about an employee, you'll need to add an employee record to your database.

After adding a new employee, a highlighted line is displayed in your employee list with the text **New Employee** displayed. In the General tab, the cursor appears in the **First Name** field and the **Last Name** field displays **New Employee**.

To Add an Employee:

1. Click the **Add** button, or from the **File** menu select **Add Employee**. The **Add** dialog box is displayed.
2. Click **Yes**.

Import Employee Data from Microsoft Small Business Accounting

Import employee information from Microsoft Small Business Accounting. The Microsoft Small Business Accounting Employees General and Custom Fields tabs are used to populate fields in your Staff Files General, Evaluations, User, and Separation tabs. Fields included are:

- **Name**
- **Job Title**
- **Address**
- **Phone Number**
- **Fax Number**
- **E-mail**
- **Status**
- **Gender**
- **Birth Date**
- **Hire Date**
- **Last Review Date**
- **Release/Separation Date**
- **Text Fields in the Custom Fields tab**

To import from Microsoft Small Business Accounting:

1. From the **F**ile menu, select **Import from Microsoft Small Business Accounting**.
2. Enter the **Database** and **Server** and click **Next**.

NOTE: You may need to get the names of the Database and Server from your Microsoft Small Business Accounting administrator to be sure you enter this information correctly.

3. Select or mark the information you want to import, such as address and phone number, and click Import.
An **Import Complete** message indicates the task is finished. It shows the number of employees added and the number of employees updated in Staff Files.
4. Click **Close**.

NOTE: Be sure you have been given the appropriate access to employee records in Microsoft Small Business Accounting to conduct the import. For example, users with Sales Person or Read Only roles can import general contact information, but can't import confidential data, such as Birth Date.

Import Employee Data from QuickBooks

Import employee information to a sample or live database from QuickBooks Pro/Premier 2003 or Enterprise Solutions 2.0 (or newer versions). The QuickBooks Personal, Address and Contact, Additional Information, and Employment Information tab fields are used to populate the matching fields in your Staff Files General and Separation tabs. Fields included are:

- **Last Name, First Name, Middle Name**
- **Phone Number**
- **Alternate Phone Number**
- **Email**

- **Address 1, Address 2**
- **City, State, Zip**
- **Active ID**
- **Hire Date**
- **Account Number**
- **Gender**
- **Social Security Number**
- **Birth Date**
- **Termination Date**

To Import from QuickBooks:

1. Open your QuickBooks file, and return to Staff Files.
2. From the **File** menu, select **Import from QuickBooks**.
3. Click **Yes** to allow the import from the QuickBooks database you identified in the **QuickBooks Connection Options** dialog box that's also used with synchronization.

An **Import Complete** message indicates the task is finished. It shows the number of employees added and the number of employees updated in Staff Files.

Synchronize Employee Data with QuickBooks

Synchronize employee information in your live database with your QuickBooks Pro/Premier 2003 or Enterprise Solutions 2.0 (or newer versions) company. The QuickBooks Personal, Address and Contact,

Additional Information, and Employment Information tab fields will be matched to the fields in your Staff Files General and Separation tabs. Fields included are:

- **Last Name, First Name, Middle Name**
- **Phone Number**
- **Alternate Phone Number**
- **Email**
- **Address 1, Address 2**
- **City, State, Zip**

To synchronize your QuickBooks data:

1. From the **Define** menu, select **QuickBooks Synchronization**. The **QuickBooks Connection Options** dialog box is displayed.
2. Mark the **At startup of Staff Files, Synchronize with QuickBooks** checkbox to have synchronization take place each time you open Staff Files.

NOTE: Using this option requires additional Staff Files start up time to allow for the synchronization process to be completed.

3. Select your **Data Transfer Settings** option:
Import data from QuickBooks will bring information into Staff Files
Synchronize data with QuickBooks will bring information into Staff Files, as well as export it from Staff Files.
4. Click **OK**.

Import Employee Data from a Text File

Import employee information from an existing text file. You can use files in .txt, .xls, or .csv formats. The fields you can import are:

- **Full Name**
- **First Name**
- **Middle Initial**
- **Last Name**
- **Hire Date**
- **City**
- **State**
- **Zip**
- **Address 1**
- **Address 2**
- **Social Security Number**
- **Home Phone**
- **Work Phone**
- **E-mail Address**
- **Birthdate**

To import from a text file:

1. From the **File** menu, select **Import from a Text File**.
2. Select the file you want to import and click **Open**.
3. Select the **Tab Delimited** or **Comma Delimited** option.

4. If the file begins with information you want to bypass during the import, you can enter a number in the **Skip top row(s)** field and it will not be included.
5. Click **Next**.
6. In the field drop down boxes, select the information you want included during the import, such as **full name**, **hire date**, and **social security number**.

Select **[Skip]** when you do not want to include that field.

7. Click **Finish**. The dialog box displays the total number of records imported and the total number of records that were not import.
8. Click **OK**.

Using the New Hire Checklist

You can use the **New Hire Checklist** to identify the procedures you follow and the documents involved when you add new employees to your company or organization. Some examples of what could be included are background check, direct deposit enrollment, and orientation tour.

The checklist also serves as a guide when adding new employees to Staff Files. You also can print a checklist report to keep with you, and you can mark-off items as you go through each for the new employee. You can use the template Staff Files provides for you, or you can define your own checklist.

Access the checklist by clicking the Checklist button in the General tab. To access the report, go to **Reports > Templates > New Hire Checklist**.

To use the new hire checklist:

1. Click the **Checklist** button in the General tab.
2. Click the check box to indicate the procedure or document has been completed.



3. Click **Close** to return to the tab.

Add Information to Tabs

You'll use the defined quick-tabs to store information for each employee. When a new employee record is added, Staff Files automatically takes you to the General tab to begin entering information. Click from tab to tab to complete an employee's record in any order you choose. Employee information is displayed in these defined tabs:

- **General**
- **Emergency**
- **Wages**
- **Benefits**
- **Accruals**
- **Training**
- **Evaluations**
- **Reminders**
- **Notes**
- **User**
- **Documents**
- **Separation**

Enter General Tab Information:

In the **General** tab you'll record the employee's name, social security number, address, and phone number, as well as EEO information, position title, and hire date.

The screenshot shows a web-based form titled "General Information" with several tabs: General, Emergency, Wages, Benefits, Accruals, Training, Evaluations, Reminders, Notes, User, Documents, and Separation. The "General" tab is active. The form contains the following fields and values:

Field	Value
First Name	Tom
M.I.	J
Last Name	Allan
Status	Active
Employee Number	093234
Birthdate	05/10/1960
SSN	489-63-7821
Hire Date	04/30/2002
I-9 Renewal Date	04/07/2003
Address	63 Alpine Ave
Location	Minneapolis
City	Minnetonka
St.	MN
Zip	55353
Home Phone	952-555-1213
Work Phone	612-555-4321 x.120
Cell Phone	952-996-3487
Fax	612-555-5325
E-mail Address	TAllan@mn.net
Department	Sales
W-4 Status	Married
Exemptions	3
Gender	Male
EEO Code	Asian
EEO Category	Sales Workers

To enter information:

1. Click the **First Name** field and enter the employee's first name.
2. Press the **Tab Key** to enter their **Middle Initial** (no period necessary).
3. Press the **Tab Key** to enter their **Last Name**.
4. Continue pressing the **Tab Key** to move from one field to the next.

Enter the remaining data in the **General** tab (status, social security number, position, etc.).

NOTE: A **Calendar** is available in the date information fields.

Enter Emergency Tab Information:

In the **Emergency** tab, you will enter an employee’s emergency contact information, including physician name and phone number.

The screenshot shows a web-based form titled "Emergency Information". At the top, there are several tabs: "General", "Emergency" (which is selected and highlighted in red), "Wages", "Benefits", "Accruals", "Training", "Evaluations", "Reminders", "Notes", "User", "Documents", and "Separation". A "Print" icon is visible in the top right corner of the form area. The form is divided into two main columns. The left column contains the following fields: "Contact Name:" with the value "Betty Allan"; "Relationship:" with the value "Wife"; "Address:" with the value "63 Alpine Ave"; "City:" with the value "Minnetonka"; "St.:" with a dropdown menu showing "MN"; "Zip:" with the value "55353"; "Home Phone:" with the value "952-555-1213"; "Work Phone:" with the value "952-677-9811"; and "Call Phone:" with the value "985-555-6788". The right column contains: "Physician Name:" with the value "Dr. Leake"; "Phone:" with the value "763-585-9993"; and "Special Notes:" with a text area containing the word "Asthma".

To enter information:

1. Click the **Emergency** tab. The **Emergency Information** fields appear.
2. Click the first open field, **Contact Name**, and enter that information.

3. Add the remaining information by pressing the **Tab Key** to move from one field to the next.

Enter Wages Tab Information:

Use the **Wages** tab to record salaries, hourly rates, or bonuses for your employees.

Date	Position	Note	Rate	Type
07/30/2006	Nat'l Sales Mgr	Pay Raise: Base (\$45,000)	45.00	Salary
07/31/2005	Office Manager	Base (\$33,000) + commission	33.00	Salary
04/30/2002	Office Manager	Training	20.00	Hourly

To enter information:

1. Click the **Wages** tab. The **Wages** information fields are displayed.
2. The current date is automatically displayed in the **Date** field. You can double-click and enter a different date, or click the down arrow to select a date using the **Calendar**.
3. In the **Position** field, select the employee's current job or position.

If you entered it in the General tab first, the program adds it to the Wages tab automatically.

4. In the **Rate** field, enter the dollar amount of the wage, such as "\$30.00" or "\$40,000."
5. In the **Wage Type** field, enter the period on which the rate is based, such as "Hourly" or "Salary."
6. In the **Note** section, enter any notes that describe the reason for the new wage, such as "New Hire," "Annual Review," or "Bonus."
7. Click **Save**.
8. Click **Close** when you have entered all necessary wage information.

Enter Benefits Tab Information:

Use the **Benefits** tab to manage an employee's benefits plan, such as when they become eligible and what they are receiving.

If an employee withdraws from a benefit program, then later decides to enroll again, the new information can be entered without affecting the historical record.

To enter information:

1. Click the **Benefits** tab. The **Employee Benefits** fields are displayed.

The screenshot shows the 'Employee Benefits' window with the following details:

- Benefits List:**
 - 401(k) Enrolled
 - Dental
 - Health
 - Life - Voluntary
- Eligibility Date:** 07/29/2002
- Enrollment Table:**

Enrollment Date	Note	Withdrawal Date
04/20/2004	Re-enrolled at new contribution rates: Employee Contribution 20% - Company	10/10/2006
07/29/2002	Employee Contribution 70% Company Contribution 30%	07/29/2003

2. Select a benefit in the **Benefits** list and update the **Eligibility Date** field, if needed for the employee.

NOTE¹: The eligibility date displayed is automatically calculated based on the employee's hire date entered in the General tab, and the eligible-after period defined in Benefit Categories.

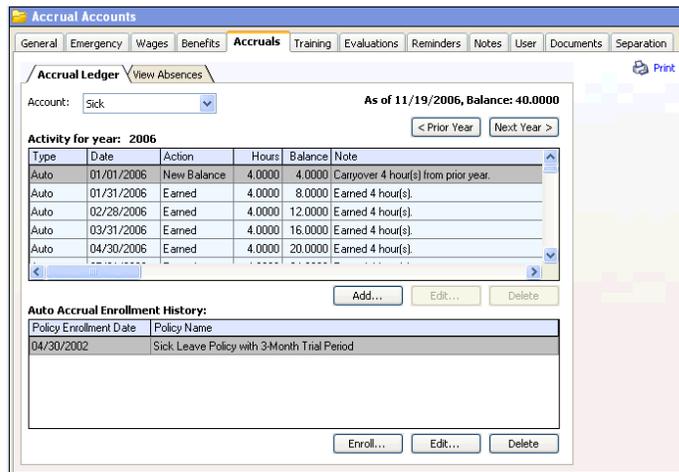
NOTE²: A checkmark is displayed in the benefit's Enrolled check box when you have entered an enrollment date for that benefit. The checkmark is removed when you enter a withdrawal date.

3. Click **Add** to enter new employee benefit information. The **Benefit** dialog box is displayed.
4. Select the Benefit from the drop-down list and enter or select the Enrollment Date.
5. If applicable, enter the amount of the Employee Contribution and the Employer Contribution for the benefit, such as "4%" for the 401(k) benefit.

6. In the Dependents and Notes sections, enter any applicable information related to the selected benefit for the employee.
7. Click Save.
8. Click Close when you have entered all necessary benefit information.

Enter Accruals Tab Information:

The Accruals tab allows you to track items such as accrued vacation time, sick leave, and overtime hours. The Accruals tab calculates and keeps a running balance of the amount, such as hours or days entered. You can enter manual transactions or set up auto accruals to maintain employee balances.



Two tabs display the accrual information you're tracking for each employee:

Accrual Ledger

This is where you maintain all activities for accrued balances and enrollments.

View Absences

This is the record of how accrued time has been used, or when the employee was absent. This information is collected from the transactions saved in the Accrual Ledger.

Before you enter information in the Accruals tab, you must define your Accrual Accounts. "Sick" and "Vacation" are already defined for you.

Completing a manual accrual entry in the accrual ledger:

1. Click the **Accruals** tab. The **Account Ledger** is displayed.
2. Select an accrual in the **Account** field and records are displayed in the ledger.
3. Click the **Add** button to display the **Manual Accrual Entry** window.
4. Enter the applicable **date**, or click the down arrow to use the Calendar for selecting the date.
5. Select the **Transaction type** for the manual entry.
 - Deduct** to identify accrued time used.
 - Earned** to identify accrued time awarded.
 - New Balance** to identify a new balance of accrued time.
 - No Action** to identify absences with no accrual action.

6. Enter the number of **Hours** or **Days** applied to this entry.
7. Click the **Note** section and enter information you would like to record with the manual entry.
8. If applicable, select the period of time used for the absence in the **Length of Absence** field, such as hours or days, and enter the number in the field below.
9. The **Posted by** field can be used to record the individual responsible for posting the manual entry.
10. Click **Save**.

To edit an entry in the accrual ledger:

1. Locate the activity line that requires changes and select it.
2. Click the **Edit** button.
3. Make necessary changes to the **Transaction, Hours, Note, Length of Absence**, and **Posted by** fields.
4. Click **Save**.

To enroll the employee in an auto accrual:

When you enroll employees in automatic accruals, Staff Files posts the Activity for year entries automatically in the Accrual Ledger according to the details of the Auto Accrual Policy.

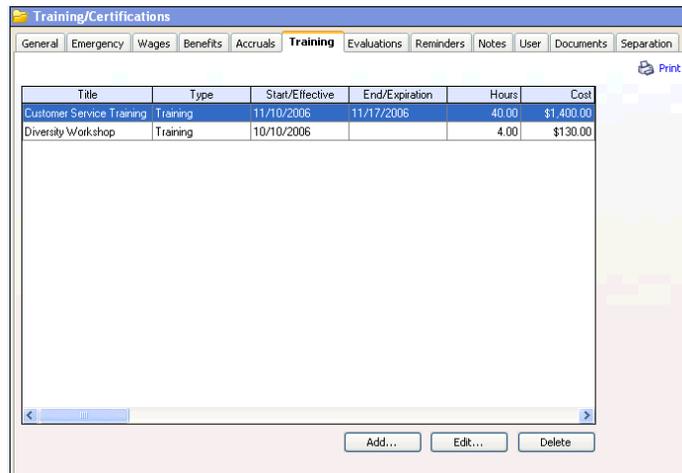
1. Click the **Enroll** button under the **Auto Accrual Enrollment History** section.

2. Select an **Auto Accrual Policy** from the drop-down list. To review the policy details before continuing, click the **View Summary** button.
3. Enter an **Enrollment date**, or click the down arrow to use the Calendar for selecting the date. Or, click the **Set hire date as enrollment date** button.
4. Click **Save**.

NOTE: You can select the Auto Accrual Enrollment, and click the Edit button to make changes to the information, if needed.

Enter Training Tab Information:

In the **Training** tab, you will enter any training and certification information you want to track for each employee.



The screenshot shows a software window titled "Training/Certifications" with a tabbed interface. The "Training" tab is active. Below the tabs is a table with the following data:

Title	Type	Start/Effective	End/Expiration	Hours	Cost
Customer Service Training	Training	11/10/2006	11/17/2006	40.00	\$1,400.00
Diversity Workshop	Training	10/10/2006		4.00	\$130.00

At the bottom of the window, there are three buttons: "Add...", "Edit...", and "Delete".

To enter information:

1. Click the **Training** tab. The **Training fields** are displayed.
2. Select the **Title** of the training program or certification. Either **Training** or **Certification** will be displayed in parenthesis to indicate type.
3. Click **Add** to enter employee training or certification information.
4. Use the **Start/Effective Date** to indicate the beginning of a training session or certification. Use the **End/Expiration Date** field to indicate the end of a training session or certification expiration. You can click the down arrow to select a date using the calendar.
5. The **Hours** field tracks the number of hours required or completed for training.
6. The **Cost** field records the amount of training or certification costs incurred.
7. In the **Notes** field, add any additional information you want included with the training or certification record.
8. Use the **Agency** field to enter the training agency or individual that is providing the training or certification.
9. The **Location** field indicates where the training session or certification exam takes place.
10. Click **Save**.

Enter Evaluations Tab Information:

Use the **Evaluations** tab to enter information about an employee's performance reviews.

NOTE: You can use the evaluation template provided by Staff Files – go to **Reports > Templates > Evaluation Form**. Print a blank copy in advance to be completed during the evaluation.

The screenshot shows the 'Performance Evaluations' window with the 'Evaluations' tab selected. The window contains a table with the following data:

Date	Description
04/30/2006	1-Year Evaluation

Below the table, there are several input fields and a list box:

- Next Review:** 05/17/2007
- Initials:** LA
- Score:** 6.5
- Category:** A dropdown menu with the following options: Availability, Dependability, Initiative, Job knowledge, Judgment, Productiveness, Quality, Reliability, Working Relationships.
- Category Comments:** An empty text area.
- Comments:** A text area containing the text: "In the last review Tom set a goal to reach 8 or higher in all categories. He fell short in Judgment and Productiveness, so these are two specific areas he will work on during the next year."
- Total Score:** 75.5
- Average:** 8.39
- Buttons:** Add, Delete

To enter information:

1. Click the **Evaluations** tab. The **Performance Evaluations** fields are displayed.
2. Click **Add**, and click **Yes** for a new evaluation record. Use the current date automatically entered in the **Date** field, or click the down arrow to use the Calendar to select the date of the evaluation.

3. The cursor will be displayed in the **Description** field. Enter a title for the evaluation, such as “Annual Review” or “Probationary Review.”
4. Tab to the **Initials** field and enter the initials of the person who performed the evaluation.
5. Tab to the **Score** field, and it becomes highlighted. The corresponding evaluation Category is highlighted as well.

NOTE: The categories in the **Category** list box are defined or edited using the **Define** menu and **Evaluation Categories**.

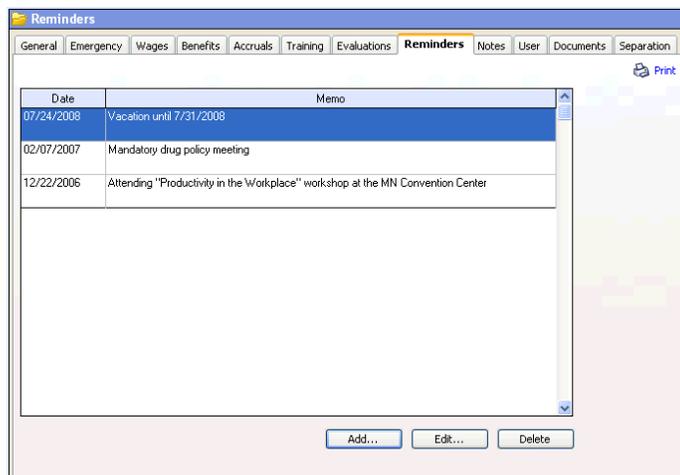
6. Enter the score or rating for the highlighted Category: a number based on your defined scale. For example, “8” based on a 10-point scale. Positive and negative scoring numbers are supported.

Also enter any category-specific comments in the **Category Comments** section.

7. Press **Enter**, and the next evaluation category will be highlighted. Enter the score/rating and comments for this category, and continue through the category list.
8. Calculation for the **Total Score** and **Average** is completed automatically after entering each category score.
9. Click the **Evaluation Comments** section to enter any additional information about the evaluation, such as “Very dedicated; volunteered to serve on Holiday Party Committee and Corporate Donations Committee.”

Enter Reminders Tab Information:

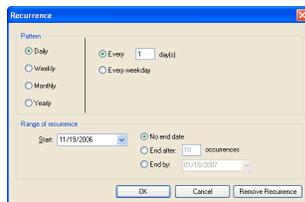
Staff Files has a pop-up reminder system that displays personalized reminders every time you start up the Staff Files program.



To enter information:

1. Click the **Reminders** tab. The **Reminders** fields are displayed.
2. Click **Add** and the **Reminders** dialog box is displayed.
3. Select **Single Reminder** or **Repeat Reminder**.
4. Enter the date of a one-time reminder in the **Date** field. The current date is automatically displayed, or you can click the down arrow to use the calendar to select a date.

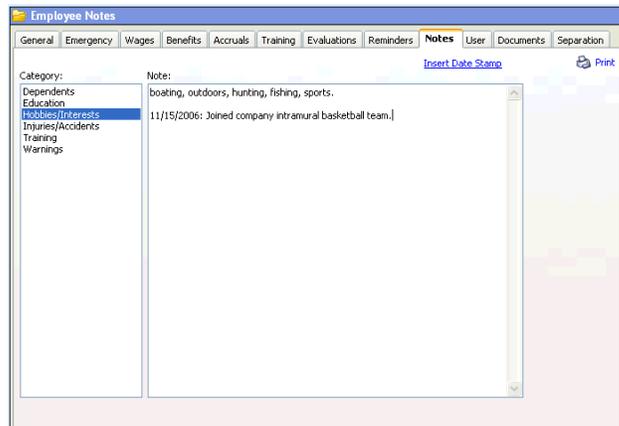
For a recurring reminder, enter specific dates, or click the **Edit** button to display the **Recurrence** dialog box, where you can select the **Pattern** and **Range of Recurrence**.



5. Click the **Memo** section and enter your reminder text, such as “Steve’s commercial driver’s license expires December 12, 2007.”

Enter Notes Tab Information:

Use the **Notes** tab to enter additional information about an employee. The maximum size of a note field is 10,000 characters, or about five pages.



To enter information:

1. Click the **Notes** tab. The **Employee Notes** fields are displayed.
2. Click the category you'll be entering the note in.

NOTE: The categories in the **Category** list box are defined or edited using the **Define** menu and **Note Categories**.

3. Tab to the **Note** field and type the information you would like to enter.
4. Track the date you enter the note by clicking **Insert a Date Stamp**. The current date is added to the note you've entered.

Enter User Tab Information:

In the **User** tab, enter any other miscellaneous information about an employee. This may include:

- **Performance objectives**
- **Employee goals**
- **Volunteer programs**
- **OSHA information**

Each description field supports a maximum of 54 characters.

You can define description fields, calendar fields, and check box fields.

To enter information:

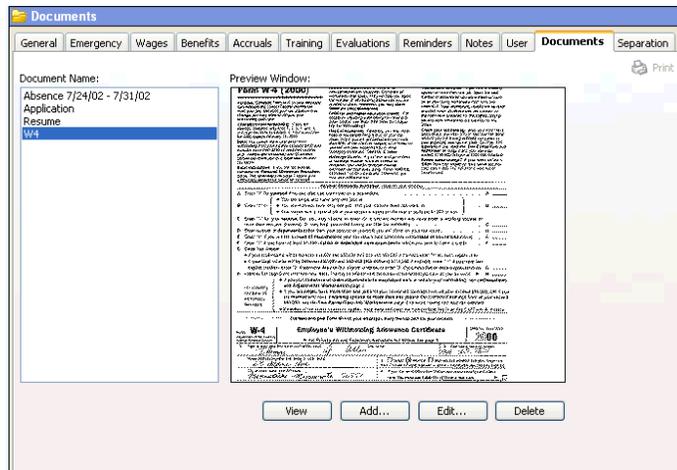
1. Click the **User** tab. The **User-Defined** fields are displayed.

2. Click the next available **Title** to display the **Label Edit** dialog box. (These fields are labeled “Field 1,” “Field 2,” etc.)
3. Enter a title for the information you want to record, such as “Driver’s license number,” and click **OK**.
4. Tab to the **Description** field and enter the employee’s information. You can use the tab key to navigate the **Description** fields.
5. For date records, such as “Parking Pass Expiration,” click the next available **Title** to display the **Label Edit** dialog box, enter the title, and click **OK**.
6. In the **Date** field, enter the date or click the down arrow to select a date using the calendar.

7. For check-off records, such as “Office Key Issued,” click the next available **Title** to display the **Label Edit** dialog box, enter the title, and click **OK**.
8. Click the check box to indicate “True,” which will also appear in reports. Those without checkmarks have “False” displayed in reports.

Enter Documents Tab Information

Use the **Documents** tab to link and view important documentation (employment application, resumes, forms, legal agreements, etc.), or images within the employee database.



Activate the preview window to display a reduced image of the linked documents. To turn this feature on or off, select **View** menu and

Document Preview. When a checkmark appears next to **Document Preview**, the feature is activated or “on.”

NOTE: The preview feature can be slow on some computers.

Staff Files can link any file type from any folder on your hard drive or network. If Staff Files cannot display the file, the program will launch the application associated with the file when you click the **View** button.

NOTE: If the Staff Files application and its corresponding files are located on a server, or if multiple users access the application on one machine, then all document or image files should be saved in the IMG folder. See Chapter 2: Installing Staff Files for more information.

To add documents:

1. Click the **Documents** tab. The **Documents** fields are displayed.
2. Click the **Add** button.

NOTE: The **Add** button allows you link to a picture, text file, or any document type file.

3. Enter the document title in the **Document Title** text box in the **Document Add** dialog box.

NOTE: If you are storing a previously scanned document or image, enter the path and file name in the **File Name** text box, or click the **Browse** button to locate the file.

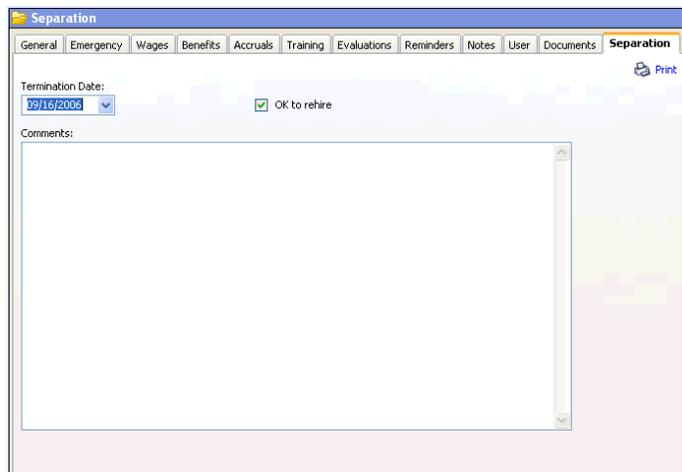
4. If you need to scan a document or image, click the **Acquire** button.

When the **Select Source** dialog box appears, select the desired Twain compliant source.

5. Your resident scanning program starts up. Scan the document or image.
6. When finished scanning, save the image and click **OK**.
7. The document appears in the **Preview Window**.

Enter Separation Tab Information:

Use the **Separation** tab to enter information about an employee's separation from your organization.

The image shows a screenshot of a software application window titled "Separation". The window has a menu bar with the following tabs: General, Emergency, Wages, Benefits, Accruals, Training, Evaluations, Reminders, Notes, User, Documents, and Separation. The "Separation" tab is currently selected. Below the menu bar, there is a "Termination Date:" label followed by a dropdown menu showing "09/16/2006". To the right of the date is a checkbox labeled "OK to rehire" which is checked. Below these fields is a large, empty text area labeled "Comments:". A "Print" button is visible in the top right corner of the window.

To enter information:

1. Click the **Separation** tab. The **Separation** fields are displayed.

2. Click on **Date** and enter the date of separation.

NOTE: A **Calendar** is available in the date information fields.

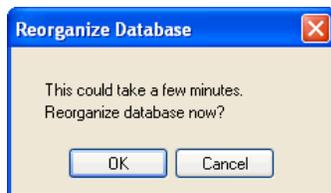
3. Check the **OK to rehire** box, if appropriate.
4. Click on the **Comments** field and enter related information about the separation.

Reorganize Employee Records:

You may need to reorganize employee records, especially if you encounter a problem reading the database. When necessary, use the **Reorganize Database** function. When you reorganize a database, the program sorts employee names alphabetically, allowing for faster name searching.

To reorganize records:

1. Click the **File** menu and select **Reorganize Database**. The **Reorganize Database** dialog box is displayed.



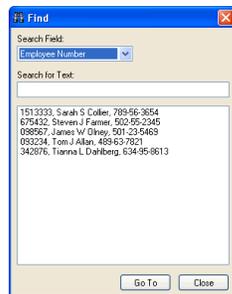
2. Click **OK**.

Search for Employee Records:

Staff Files enables you to find a specific employee record quickly. You can search for an employee record by name, employee number, or social security number.

To search records:

1. Click on the **Find** button. The **Find** dialog box is displayed.



2. In the **Search Field** drop-down list you can choose to search employees by **Name**, **SS Number**, or **Employee Number**.
3. To narrow your search, type in the **Search for Text** field any text you know appears in the employee's name, SSN, or employee number. For example, the first number of the employee number.

NOTE: As you enter text in the **Search for Text** field, you will see the employee list below update automatically to match your search criteria.

4. Scroll through the list to select the employee record you want to find.

5. Click the record you want to view, and the information will become highlighted.
6. Click the **Go To** button and the employee's record is displayed.

Add Employee Photos:

Staff Files enables you to add an employee photo to the employee's record. Photos (black and white or color) should be scanned and saved in a **.BMP** or **.JPG** format.

NOTE: If the Staff Files application and its corresponding files are located on a server, or if multiple users access the application on one machine, then all photos should be saved in the IMG folder. See Chapter 2: Installing Staff Files for more information.

To add a photo:

1. Click an employee's name from the name list box.
2. Click the **Photo** button. The program displays the **Photo** dialog box.
3. Click the **Select** button and select the correct file name from the list of files: *.BMP or *.JPG. Or, use the **Browse** function to help you locate the file you need.

The program now displays the employee's photo.



4. Click the **Close** button.

Delete & Hide Employee Information:

To Delete: You can easily remove employee records from the Staff Files database by using the **Delete** button.

1. Click the **Delete** button. The **Delete** confirmation dialog box is displayed.
2. Click **Yes**.

The program deletes all the employee record information for the selected employee in each tab. **You cannot recover a deleted record!** Instead of deleting employee records, you may want to use the **Hide** function.

To Hide: You can use the **Hide** function instead of deleting employee records. This function enables you to retain all employee records while leaving employees of a particular status (terminated, inactive) out of your reports.

1. Click **D**efine menu and select **S**tatus. The **S**tatus window is displayed.
2. The **H**ide check boxes are next to each status. Double-click on those you want to hide.

A checkmark appears to indicate the records are now “hidden” and will not print on reports.

Chapter 6:

Managing Your Staff Files

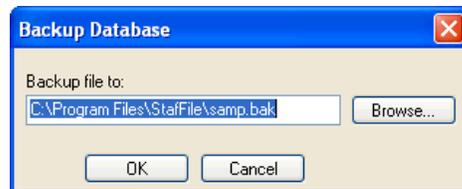
This chapter describes how to backup employee records, restore or repair the Staff Files database, compact employee records, set the data path, set up and view reminders, and manage security by setting up passwords.

Backup Employee Records

It's recommended you backup your employee records frequently, and keep a backup copy in case the files become unusable due to some unforeseen computer problem. The **Backup Reminder** feature is described on page 85.

To Backup Database:

1. Click **F**ile and select **B**ackup. The program displays the **B**ackup **D**atabase dialog box.



2. Use the **Browse** function to select the location for backing up your database. Or, enter the drive letter followed by the name of the employee file.
3. Click **OK**.

Repair & Restore the Staff Files Database

To Repair Database:

Staff Files has a built-in database repair utility. This utility should be run any time a database error is encountered, or you are unable to launch Staff Files.

1. Click the **Start** button, select **Programs** ® **ABS Applications** ® **Staff Files Database Repair** from the **Staff Files** folder.
2. The **Repair Database** dialog box is displayed. Depending upon the size of your employee records, the repair database process could take a few minutes.

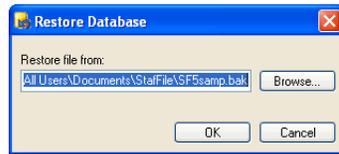
NOTE: When you repair your database, **you will lose all information entered since your last database backup.**

3. Click **OK** to continue.

To Restore Database:

Restoring the Staff Files database overwrites all your current work with the last version of the database you backed up.

1. Click the **F**ile menu and select **R**estore. The **Restore Database** dialog box is displayed.



2. Use the **B**rowse function to select the database backup file you want to restore. Or, enter the drive letter followed by the name of the file.
3. Click **O**K.

NOTE: When you restore your database, **you will lose all information entered since your last database backup.**

4. Click **Y**es to restore the file and overwrite your current database.

Compact Employee Records

Compacting employee records removes any deleted records and allows for faster searches.

To Compact Records:

1. Click the **F**ile menu and select **C**ompact Database. The **Compact Database** dialog box is displayed.

NOTE: Depending on the size of your employee records, the compact process could take several minutes.

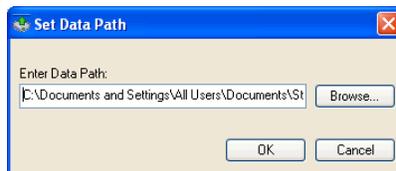
2. Click **OK** to continue.

Set Data Path

Using **Set Data Path** allows you to refer to databases other than the Live Data default located in the c:\Program Files\StaffFile folder. Your default Access database is called EmpF. **Set Data Path** essentially directs Staff Files to the database you wish to reference.

To Set Data Path:

1. Click the **F**ile menu and select **S**et **D**ata **P**ath. The **Set Data Path** dialog box is displayed.



2. Use the **B**rowse function to select the database you wish to reference. Or, enter the drive letter followed by the name of the file.
3. Click **OK**.

4. Close your Staff Files application and re-open it to operate off the new database.

NOTE: Whenever the Staff Files database is moved from the default location to another location, users must move PswdE.txt, PswdS.txt, IMG folder, and SFLetters folder into the same folder as the Staff Files database.

Manage Security

Staff Files has a multi-level password system. You can allow access to one or more tabs, such as the **General** and **Emergency** tabs, and restrict access to sensitive information in other tabs, such as Wages, Reminders, and Evaluations. You can also set manager access to view information for their specific department only.

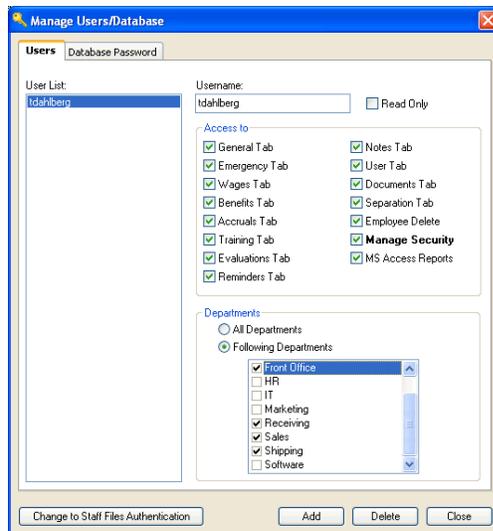
You can also choose between **Windows Authentication** or **Staff Files Authentication**. When using **Windows Authentication**, you may only add user names for those who already have access to the computer on which Staff Files is installed, or access to the domain that connects to the computer on which Staff Files is installed. When **Staff Files Authentication** is used, you can add any user name.

If you are using your Staff Files information in a Microsoft Access database, you can also define a password to protect the information from being manipulated through Access. You also can restrict access to your reports.

NOTE: It is recommended you first install Staff Files on the administrator machine and set up user access and rights. Then, install Staff Files to remaining workstations for multi-user licenses.

To Manage Security:

1. From the File menu, select Manage Security. The program displays the **Manage Users/Database** dialog box.



2. In the **Users** tab, enter or select the user you are setting up security for.
3. Click **Add**, if you're entering a new user that isn't included in the list. You must enter a valid username from their computer or domain.
4. Mark **Read Only** for access that allows viewing information only. This will restrict them from making any changes to records.

5. In the **Access To** section, mark each tab you want the user to have access to.
6. In the **Department** section, mark **All Departments** to allow complete access or mark **Following Departments** and enter the specific department, or departments, you're allowing access to.
7. Click the **Change to Windows Authentication** or **Change to Staff Files Authentication** button to select the authentication scheme for the selected user.

NOTE: Switching to **Windows Authentication** deletes all existing passwords and you must re-define new passwords according to the new authentication scheme.

8. Click the **Database Password** tab to define the password for your Microsoft Access database.
9. Click **Close** when you are finished.

NOTE: To delete a user from the list, select the user and click **Delete**.

Set Up & View Reminders

Staff Files features a built-in reminder system. It pops-up messages you've set up each time you start the Staff Files program. Staff Files also features an e-mail reminder system, enabling you to send an e-mail reminder to the employee as well.

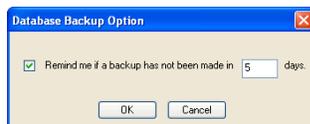
Reminders include the text you enter in the **Reminders** tab for an employee. Reminders can also be displayed for any upcoming reviews, based on the **Next Review** date you enter in the **Evaluations** tab. The built-in reminder system also has a function that enables you to view all reminders.

Set Backup Reminder:

Set a reminder to pop-up when you need to backup your database. You determine how frequently you want the message to appear. This reminder will appear when you first open Staff Files.

To set a backup reminder:

1. Click the **Define** menu and select **Backup Reminder**. The **DB Backup Options** dialog box is displayed.



2. Be sure to mark the **Remind me...** check box to activate the reminder.
3. Enter a number to indicate how many days between reminders.
4. Click **OK**.

NOTE: You can deactivate the Backup Reminder when you open Staff Files. Simply click the **Disable all future Database Backup Reminders** box. The checkmark is displayed to indicate it is no longer active. Click **OK**. You can reactivate the reminder by going to Backup Reminder in the Define menu.

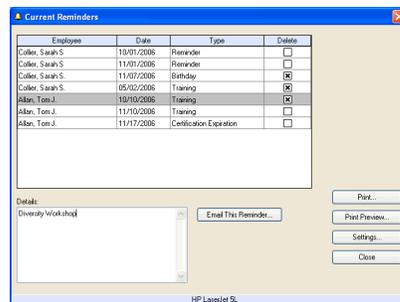
View Current Reminders:

The **Current Reminders** feature allows you to view a complete list of your reminders. The Current Reminders are:

- **Anniversaries**
- **Benefit Eligibility**
- **Birthdays**
- **Certifications**
- **I-9 Renewals**
- **Reviews**
- **Reminders** (defined in the Reminders tab)
- **Training**

To view current reminders:

1. Click the **View** menu and select **Current Reminders**. The **Current Reminders** dialog box is displayed.



2. Select the reminder you want to view from the **Reminders** list. The details of the reminder are displayed in the fields at the right.

3. Click **Close** when you are finished viewing the reminders.

NOTE: Reminders will continue to be displayed until you have deleted them. To delete, simply click the **Delete** checkbox.

Set Up E-mail Reminder:

The Staff Files **E-mail Reminder** works with your system's default e-mail program. Staff Files will send the reminder to the e-mail address you identify in the employee's General information tab.

To set up e-mail reminders:

1. Click the **View** menu and select **Current Reminders**. The **Current Reminders** dialog box is displayed.
2. In the **Reminders** list, click the reminder you would like to e-mail, and it becomes highlighted.
3. The details of the reminder will be displayed in the fields below. To add additional information to your e-mail, use the message box of your e-mail program.
4. Click the **E-mail This Reminder** button.

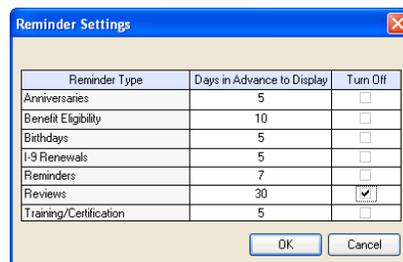
NOTE: You will receive an **Error Message** if you have not set up the default e-mail system, or if you have not entered an e-mail address for the employee in the General tab.

Edit Reminder Settings:

Staff Files features a built-in reminder system. It pops-up messages you've set up each time you start the Staff Files program.

To edit reminder settings:

1. Click the **Define** menu and select **Reminder Settings**. Or, click **Settings** in the Current Reminders window. The **Reminders Settings** dialog box appears.



2. Click the **Reminders** box, and enter the number of days in advance you want reminders from your **Reminders** tab to appear.
3. Tab to each box until you have entered a number for each reminder you will be using.
4. Click the **Turn Off** box, if appropriate, for reminders you will not be using. A checkmark will appear to indicate you have disabled that type of reminder.
5. Click **OK**.

Delete Reminders:

Reminders will continue to pop-up during program start up until you have deleted them.

To delete reminders:

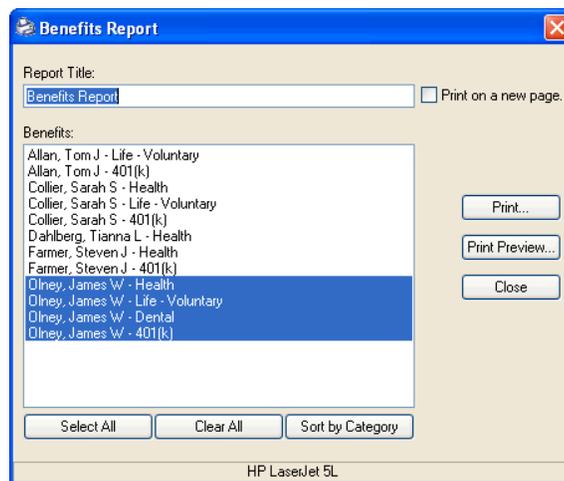
1. Click the **View** menu and select **Current Reminders**.
2. Select the reminder you wish to delete from the **Reminders** list, and it becomes highlighted.
3. Click the **Delete** checkbox.
4. Click **Close** when you are finished deleting reminders.

Chapter 7:

Printing Reminders, Reports, & Letters

This chapter describes how to print current reminders, employee reports, staff reports, birthday reports, mailing labels, phone lists, and Microsoft Access reports. Plus, you'll learn how to prepare and customize employee correspondence with the Create/Edit and Publish Letters features.

Staff Files' flexible report writing capability provides a total of twenty-three different types of reports, plus mailing labels and phone lists. An example of a typical print dialog box appears below.



Print Menus & Tools

The print dialog box displays four options when printing reminders and reports:

- **Print**
- **Print Preview**
- **Printer Setup**
- **Print to a New Page**

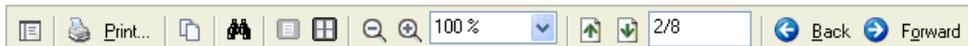
Print:

The **Print** button allows you to print directly to the printer.

Print Preview:

The **Print Preview** button gives you a preview image before printing. Use this function to verify your selection is correct, or view the information needed without printing.

The print preview functions are at the top of the screen.



The **TOC** button displays the table of contents for the selected records on the left side of the preview window.



The **Print** button enables you to print the previewed report directly to the printer.



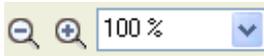
Use the **Copy** button to copy what you are previewing so you can paste it to another location.



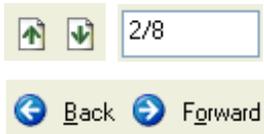
The **Find** button allows you to use a find function within the document you are previewing.



Use the **Single** and **Multiple Page** buttons to preview your document a single page at a time, or multiple pages at one time.



The **Zoom** buttons allow you to zoom in and out from the preview image by clicking the minus or plus icons, or entering a percentage.



The **Navigation** buttons allow you to move to the *Previous* or *Next* record, *Back* or *Forward*. The Display Window shows what record is displayed out of the total records selected.

Other print preview functions:



The **File Menu** allows you to export the report to these file formats: PDF, RTF, Tab Delimited Text, and Excel. Or, use the menu to close a preview window by clicking **File® Exit**.

The **E-mail Menu** allows you to e-mail the report in these file formats: PDF and RTF.

Printer Setup:

Use the **Printer Setup** button to select a printer and change the printer options, such as paper size and page orientation.

Print Current Reminders

In the **Current Reminders** window you can preview and print a complete list of your reminders. The list displays the employee, date, and reminder type, including:

- **Anniversaries**
- **Benefit Eligibility**
- **Birthdays**
- **Certification Expirations**
- **I-9 Renewals**
- **Reviews**
- **Reminders** (defined in the reminders tab)
- **Training**

Sort your reminders by employee, date, or type. Click on the column title bar. An arrow will indicate ascending or descending order.

To Preview &/or Print:

1. Click the **View** menu and select **Current Reminders**.
2. Click **Printer Settings** to set up printer, and page size and orientation.

3. Click the **Print Preview** button to view your current reminders list. Or, click the **Print** button if a preview is not needed.
4. Click the **Print** button at the top of the preview.

Print Employee Reports

You can print employee reports using the **Print** button or the **Reports** menu. The **Reports** menu enables you to access and print employee reports without navigating through the tabs. Employee reports include:

- **Comprehensive with picture**
- **Comprehensive**
- **General**
- **Emergency**
- **Wages**
- **Benefits**
- **Accruals**
- **Training**
- **Evaluations**
- **Reminders**
- **Notes**
- **User**
- **Separation**

To Print with the Print Button:

1. Click the tab that displays the information you want to print.
2. Click the **Print** button. In the **Report Title** field of the dialog box it indicates the tab you are printing from.
3. In the **Employees** list, select one or more employees from the list box. Or, use the **Select All** button to select every employee.
4. Use the **Sort** and **Filter** options, if needed.
5. Select a **From** and **To** date range, if needed.
6. Mark the **Print to a new page** option to define page breaks and set up printing to begin new pages with each new employee.
7. Click a print option: **Print Preview** or **Print**.
8. Click **Close**.

To Print with the Report Menu:

1. Click the **Reports** menu, select **Employee Reports**, and the report type.
2. The **Report Title** field in the dialog box shows the report you selected.
3. In the **Employees** list, select one or more employees from the list box. Or, use the **Select All** button to select every employee.

4. Use the **Sort** and **Filter** options, if needed.
5. Select a **From** and **To** date range, if needed
6. Click a print option: **Print Preview** or **Print**.
7. Click **Close**.

Employee Report Examples:

3/28/2004		Comprehensive Report		1	
Sharon T. Bergeron					
Employee Number:	112436	SSN:	502-55-1284		
Address:	1234 Marberry Way Minneapolis MN 55403	Birthdate:	11/20/1969		
Home Phone:	612-555-1234	Fax:	612-555-5325		
Work Phone:	612-555-4321 x.114	Email Address:	sbergeron@gmn.net		
Cell Phone:	612-643-2108				
EEO Code:	White	Gender:	Female		
EEO Category:	Office/Clerical/Workers	Status:	Active		
W-4 Status:	Single	Exemptions:	0		
Hire Date:	1/17/2002	Department:	Front Office		
I-9 Renewal Date:	1/17/2003	Location:	Minneapolis		
Next Review:	7/21/2003	Job/Position:	Admin.		
Emergency Contact					
Contact Name:	Karen Bergeron	Physician Name:	Michael Jones		
Relationship:	Sister	Phone:	612-555-4674		
Address:	522 Stephens Pointe Minneapolis MN 55442				
Home Phone:	612-555-9632				
Work Phone:	612-555-4451				
Special Notes:	N/A				
Wages					
Note:	Performance	Rate:	13.75 Hour		
Date:	1/22/2003				
Latest Evaluation					
Description:	Evaluation - 1 year	Total Score:	75		
Date:	1/22/2003	Average:	8.3333		
User					
Driver's License #:	MN 1890-36689				
Pager #:	612-555-8520				

3/28/2004	Benefits Report	1
	Sharon T. Bergeron	
Employee Number:	112436	
Benefit:	Health	Latest Enrollment Date: 8/6/2003
Eligibility Date:	1/17/2002	Latest Withdrawal Date:
Enrolled?	Yes	
Note:		
Benefit History:		

3/28/2004	User Report	1
	Tom J. Allan	
Employee Number:	093234	
Driver's Licence#	MN 574-895-6412-775-6341	
Pager #	1-888-555-4424	
	Sharon T. Bergeron	
Employee Number:	112436	
Driver's Licence#	MN 1890-36699	
Pager #	612-555-8520	
	Sarah S. Collier	
Employee Number:	890432	
Driver's Licence#	MN 1894-26555	
Pager #	793-555-1474	

Print Staff Reports

You will print Staff Reports using the **Reports** Menu. Staff reports include:

- **Accruals by Date**
- **Anniversaries**
- **Benefits Detail**
- **Benefits Summary**
- **Birthdays**
- **EEO Detail**
- **EEO Summary**
- **Evaluations by Date**
- **New Hire Checklist Detail**
- **Note Categories**
- **Reminders by Date**
- **Seniority**
- **Training Categories**

To Print Staff Reports:

1. Click the **Reports** menu, select **Staff Reports**, and the report type.
2. The **Report Title** field in the dialog box shows the report you selected.
3. Select one or more items from the list box. Or, use the **Select All** button to select every item.
4. Use the **Sort** and **Filter** options, if needed.

5. Select a **From** and **To** date range, if needed
6. Click a print option: **Print Preview** or **Print**.
7. Click **Close**.

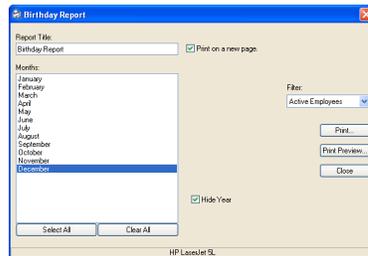
Staff Report Examples:

3/28/2004 Benefits Detail Report 1						
Emp No.	Name	Benefit	Eligibility Date	Benefit Status	Latest Enrollment	Latest Withdrawal
093234	Tom J. Allan	401(K)	4/30/2002	Not Enrolled		
		Dental	4/30/2002	Not Enrolled		
		Health	4/30/2002	Not Enrolled		
		Life	4/30/2002	Not Enrolled		
		Vision	4/30/2002	Not Enrolled		
112436	Sharon T. Bergeron	401(K)	1/17/2002	Enrolled	8/6/2003	
		Dental	1/17/2002	Not Enrolled		
		Health	1/17/2002	Enrolled	8/6/2003	
		Life	1/17/2002	Not Enrolled		
		Vision	1/17/2002	Not Enrolled		
890432	Sarah S. Collier	401(K)	5/1/2002	Not Enrolled		
		Dental	5/1/2002	Not Enrolled		
		Health	5/1/2002	Not Enrolled		
		Life	5/1/2002	Not Enrolled		
		Vision	5/1/2002	Not Enrolled		

3/28/2004 EEO Detail Report 1							
Employee Number	Name	Status	Job Position	Hire Date	Gender	EEO Category	EEO Code
093234	Tom J. Allan	Active	Natl Sales Mgr	4/30/2002	Male	Professionals	White
112436	Sharon T. Bergeron	Active	Admin.	1/17/2002	Female	Office/Clerical Workers	White
890432	Sarah S. Collier	Active	Office Mgr.	5/1/2002	Female	Officials and Managers	African American
675432	Steven J. Farmer	Active	Office Mgr.	2/28/2003	Male	Officials and Managers	Hispanic
	Elizabeth N. Mason	Active		3/15/2007	Female		
	Dan T. Miller	Active		11/1/2006	Female		
098567	James W. Olney	Active	IS Manager	1/4/2003	Male	Officials and Managers	White
	Gregg O. Schneider	Active		6/15/2007	Female		

Print Birthday Reports

1. Click the **Reports** menu, select **Staff Reports**, and **Birthdays**. The report name is displayed in the **Report Title** field in the **Birthday Report** dialog box.



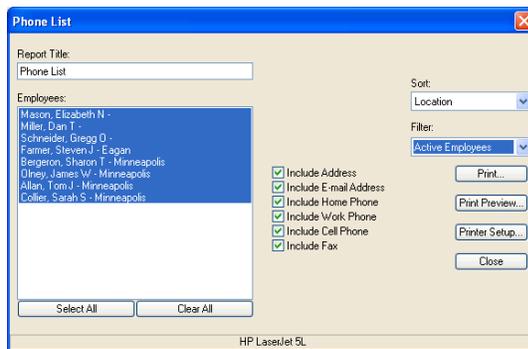
2. In the **Months** list, select one or more months in the list box. Or, use the **Select All** button to select every month.
3. Click the **Hide Year** checkbox to hide the year the employee was born.

NOTE: When you select the **Hide Year** option, only the month and date of the birthday are displayed. The year will not appear to reveal an employee's age.

4. Use the **Filter** option, if needed.
5. Mark the **Print to a new page** option to define page breaks and set up printing to begin new pages with each new month.
6. Click a print option: **Print Preview** or **Print**.
7. Click **Close**.

Print Phone Lists

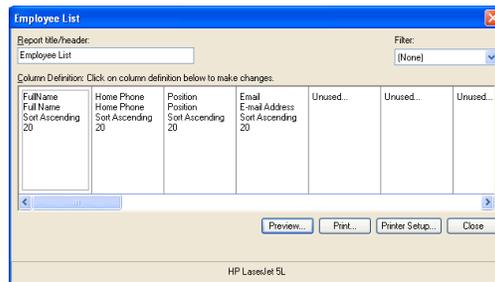
1. Click the **Reports** menu and select **Phone List**. The report name is displayed in the **Report Title** field in the **Phone List** dialog box.



2. In the **Employees** list, select one or more employees in the list box. Or, click the **Select All** button to select every employee.
3. Click the checkbox next to each information category you want included in the report.
4. Use the **Sort** and **Filter** options, if needed.
5. Click a print option: **Print Preview** or **Print**.
6. Click **Close**.

Print Employee Lists

1. From the **Reports** menu, select **Employee List**. The report name is displayed in the **Report Title/Header** field in the **Employee List** dialog box.



2. In the **Column Definition** section, identify the information you want to include in the list by double-clicking each column to display the **Employee List Column Definition** dialog box.
3. In the **Employee List Column Definition** dialog box, select the **Field** name and **Column Header**. Also enter the character **Width** for the column, and ascending or descending **Sort** order. Or, click the **Delete** Column button for information you are not going to include in the listing.
4. Use the **Filter** option, if needed.
5. Click a print option: **Preview**, **Print** or **Printer Setup**.
6. Click **Close** to exit.

Print Microsoft Access Reports

Staff Files uses a Microsoft Access database to store employee records. If you have, and can use Microsoft Access, you can create your own customized reports and add them to Staff Files. You must use Microsoft Access 97, 2000, or 2003.

To Print Access Reports:

1. Open the Staff Files database (SF5EMPF.MDB) in Microsoft Access. The database is usually stored in the c:\Documents and Settings\All Users\Documents\Staff Files folder.
2. Create the desired reports. (Consult your Microsoft Access documentation for information on how to create report formats.)

NOTE: Take care when editing information from outside Staff Files, particularly when deleting information from the database. **Deleting certain information could cause unpredictable results.** It is a good practice to make a backup copy of your Staff Files database before deleting information from outside Staff Files.

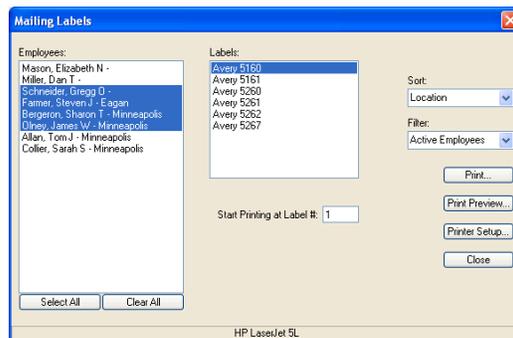
3. Any reports added to the database will automatically be listed under the Staff Files **Reports, Access Reports** menu the next time you start up Staff Files.
4. Select the Access Report you want, and click **Run Selected Report**.
5. Choose **File®Print** after your report opens in Access.

Print Mailing Labels

Staff Files allows you to print employee mailing labels in six different size Avery labels. The Avery labels to choose from are: 5160, 5161, 5260, 5261, 5262, and 5267.

To Print Mailing Labels:

1. Click the **T**ools menu and select **M**ailing Labels. The **Mailing Labels** dialog box is displayed.



2. In the **E**mployees list, select one or more employees in the list box. Or, use the **S**elect All button to select every employee.
3. Select the desired **A**very mailing label in the list box and enter a number in the box **S**tart Printing at Label #.
4. Use the **S**ort and **F**ilter options, if needed.

5. Click a print option: **Print Preview** or **Print**.
6. Click **Close**.

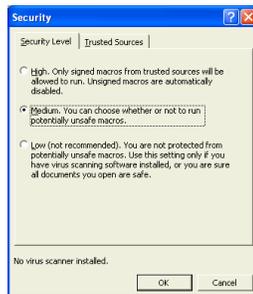
Create & Publish Letters

The time-saving **Create/Edit Letters** feature will help you prepare employee correspondence in a fraction of time. Staff Files has created 37 human resources and personnel letter templates to help you improve communication with your employees.

Using Microsoft Word, you can customize letters and populate various fields with the information from your Staff Files database. You can also write your own letters, or edit existing letters. Additionally, the **Publish Letters** feature, gives you the capability of printing customized letters from Microsoft Word.

NOTE: In order to use these features, you will need to **Enable Macros** for Microsoft Word.

This may require you to change your current security settings in Microsoft Word. To do so, follow these steps:

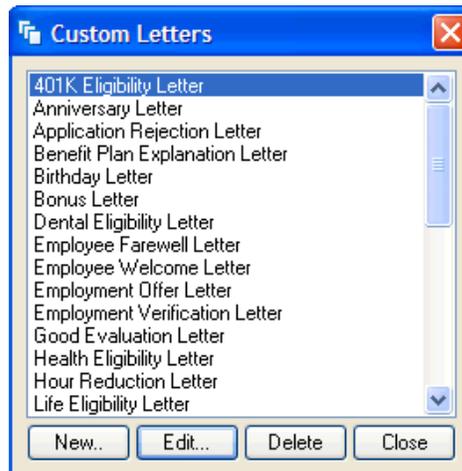


1. Open Microsoft Word.
2. Select **Tools®Macro®Security**.
3. In the **Security Level Tab**, select Medium or Low (not recommended).
4. Close Microsoft Word.

Now, you have enabled macros allowing you to use the Create/Edit or Publish Letters features in Staff Files.

To Create/Edit Letters:

1. From the **T**ools menu, select **L**etters® **C**reate/Edit Letters. The **C**ustom Letters dialog box is displayed.



2. Select **N**ew to write your own letter. Or, select **E**dit to use one of the letter templates provided in Staff Files.
3. Enter a letter title if you're creating your own letter. Or, click the title of the letter template you wish to edit.
4. Click **N**ew or **E**dit.

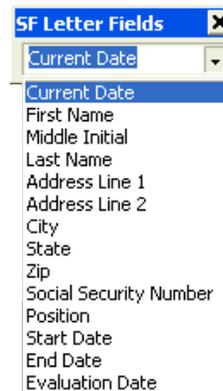
Staff Files launches Microsoft Word, and displays the **SF Letter Fields** drop down list at the left of your screen.

If you're creating your own letter: Write your letter using Microsoft Word as you normally would. Personalize lines of the letter by clicking the items you wish to include, such as the current date and the employee's name, in the SF Letter Fields drop down list. The items you select appear in your letter with a gray highlight, as shown below.

«CurrentDate»

If you're editing a letter template: Edit letter text where needed using MS Word as you normally would. Add or delete SF Letter Fields as needed, and locate any items you need to input, which are displayed as shown below.

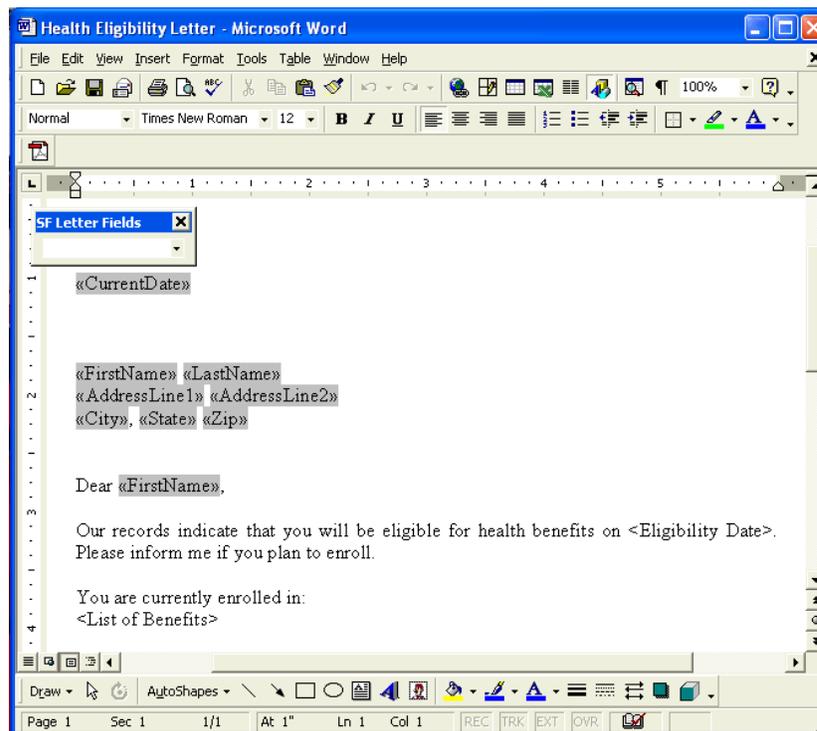
<Vacation Accruals Balance>



5. Select **File** and **Save** when your letter is finished. Click **No** so you do not accept saving changes to the template, and close Microsoft Word.

NOTE: If the Staff Files application and its corresponding files are located on a server, or if multiple users access the application on one machine, then all letters should be saved in the SFLetters folder. See Chapter 2: Installing Staff Files for more information.

This is an example of how a Staff Files letter template appears.



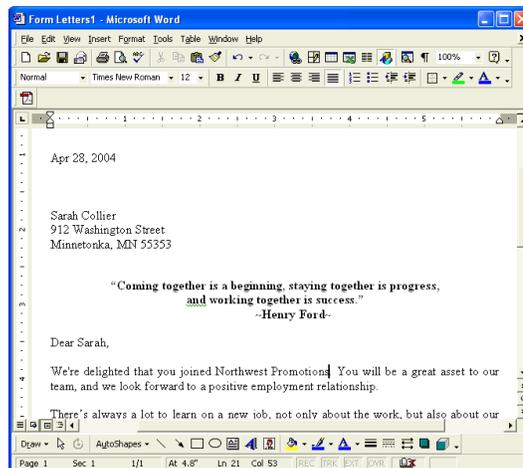
To Publish Letters:

1. Click the **T**ools menu and select **L**etters ® **P**ublish Letters. The **P**ublish Letters dialog box is displayed.
2. Select the title of the letter you wish to publish and the recipient(s).
3. Click the **P**ublish Letter button.

NOTE: Staff Files launches Microsoft Word and displays the letter you've selected to publish. If you've selected more than one recipient, there will be a page for each in Microsoft Word.

4. Click the **P**rint button, or select **F**ile and **P**rint.

This is an example of a letter ready for publishing.



To Delete Letters:

1. From the **T**ools menu, select **L**etters ® **C**reate/Edit Letters.
2. Select **D**elete.
3. Select the title of the letter you wish to delete.
4. Click **D**elete.
5. Click **Y**es to delete.
6. Click **C**lose.

Index

A

Access reports	104
Accrual accounts	
auto	25
defining	23
reporting	95, 99
Accruals tab	60
Adding employee records	47, 54
Adding employees	47
Anniversary	
reminders	85
reports	99
Auto accruals	25

B

Backup records	79
Backup reminder	86
Benefits	
define	32
tab	58
Birthday reminder	
set up	85
view	85
Birthday report	101

C

Calculator button	15
Calendar button	15
Change field label	38
Check for updates	xi
Compact records	81
Comprehensive report	95
Comprehensive w/picture reports ..	95
Copy button	91
Create letters	107
Current reminders	
delete	90
e-mail	88
print	94
set up	85
view	85
Custom filters	
defining	43
delete or edit	45
using	45
Custom sorts	
defining	40
delete or edit	42
using	41
Custom reports	104

D

Database	
backup	79
compact	81
reorganize	74
repair	80
restore	80
Data path	82

Index

Define	
accrual accounts	23
benefit categories	32
departments	28
EEO categories	28
EEO codes	29
evaluation categories	34
locations	29
note categories	35
positions	30
status	30
training/certifications	36
W-4 status	30
wage type	31
Define menu	15, 21-45
Delete	
button	15
employees	77
filters	45
letters	111
list items	38
records	77
reminders	90
sorts	42
Delete employee records	77
Delete employees	77
hide	77
Departments	
defining	23
Document preview	92
Documents tab	71
Drop-down lists	17
delete items	38

E

Edit letters	94
--------------------	----

Edit list items	37
EEO categories	
defining	28
entering	55
reports	95, 99
EEO codes	
defining	29
entering	55
reports	95, 99
EEO detail report	99
EEO summary report	99
E-mail reminders	88
Emergency tab	56
Employee information	
entering	55
importing	48, 49, 52
searching	75
Employee records	
adding	47
deleting	77
printing	95
Employee list	17
Employee reports	95
Enable macros	108
Evaluation categories	
defining	34
evaluations tab	65
Evaluations	
defining	34
entering	65
reports	95, 99
Evaluations tab	65

F

Fields	38
--------------	----

-
- Field items 38
 - Field labels
 - changing 38
 - File menu
 - backup 79
 - compact 81
 - reorganize 74
 - restore 80
 - Filters
 - defining 43
 - delete or edit 45
 - using 45
 - Find 15, 75
- G**
- General information 22, 55
 - General tab
 - defining list items 22
 - entering information 55
- H**
- Help
 - check for updates xi
 - help menu xi
 - technical support xi
 - Hide
 - employee information 77
 - function 77
 - year 101
- I**
- Importing
 - data from Microsoft
 - Small Business Accounting 48
 - data from QuickBooks 49
 - data from text file 52
 - photos 76
- L**
- Installation
 - multi-user version 8
 - single-user version 6
 - system configuration 5
 - system requirements 5
 - Installing
 - install directory 6
 - minimum requirements 5
- L**
- Labels
 - changing 38
 - mailing 105
 - Letters
 - create 107
 - delete 111
 - edit 107
 - print 110
 - publish 110
 - Lists
 - deleting from 38
 - drop-down 17
 - setting up 22
 - Live data 14, 21
 - Locations
 - defining 29
 - entering 55
- M**
- Macros 108

Index

Mailing labels 105
Menu bar 15
Merge letters 106
Microsoft Access reports 104

N

Navigation buttons 92
Next review date 65
Note categories
 defining 35
 notes 68
 printing 95, 99
Notes tab 68

P

Passwords 83
Phone lists 102
Photo button 76
Photos 76
Positions
 defining 30
 deleting 38
Print button 15, 92
Print preview button 92
Print setup 94
Printing reports 95, 99
Print reports
 birthdays 101
 employee lists 103
 employee reports 95
 letters 110
 mailing labels 105

 phone lists 102
 reports menus 95, 99
 staff reports 99
 types of 95, 99
Publish letters 110

Q

Quick-action buttons 15
QuickBooks
 employee data 49
 importing 49
 synching 50
Quick-tabs 54

R

Reminders
 backup 86
 current 87
 date options 85
 delete 90
 edit settings 89
 e-mail 88
 printing 94
 setting up 85
 viewing 87, 94
Reminders by date report 99
Reminders tab 67
Reorganizing database 74
Repair database 80
Reports
 employee 95
 menu 15, 95

Microsoft Access	104
staff	99
Restore database	68

S

Sample data	14
Searching	75
Security	83
Seniority reports	99
Separation tab	73
Set data path	82
SF Letter fields	107
Sorts	40
Sorting records	40, 74
Staff Files	
description	2
installation	6
installation requirements	5
entering employees	54
managing	91
setting up	21
starting	13
reports	95, 99
Status	
defining	30
hiding	77

T

Technical support	xi
TOC button	92
Tools menu	
letters	106
mailing labels	105
Training tab	63

U

Updates	xi
User guide conventions	x
User tab	69

V

Viewing	
photos	76
reminders	85, 94
View menu	
reminders	85
document preview	92
select sort & filter	40, 43

W

W-4 status	
defining	31
reporting	95
Wages tab	57

Z

Zoom	92
------------	----

