Version 8.0 Quick Start

Staff Files and Staff Files Pro offer flexible systems for the storage and retrieval of important, confidential personnel information. Both are electronic filing systems that use a familiar interface—folder tabs. Through the quick-tab navigation system, you can easily and quickly find personnel information.

With Staff Files and Staff Files Pro, 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 both let you define the type of information you want to keep.

You can use the HR Documents tool in Staff Files Pro, to create your employee forms, policies, and more, including employee handbooks and manuals, using a library of professional templates you customize with your details. Staff Files Pro also features an audit trail tool that helps companies keep a log of activity, such as types of changes made to records and by whom, when multiple users have access and make entries.

What You Can Do with Staff Files

It's efficient, flexible, effective, and secure.

Here's a sample of what you can do with Staff Files & Staff Files Pro:

Introducing! Use the new Evaluations Score report to quickly identify the top performing employees in your company. This report lists total and average overall performance scores – as well as the number of evaluations completed and the category average score – for each employee. Sorting employees by category average allows you to examine comparable scoring throughout your company even though the employees may have different evaluation criteria, number of categories, or number of evaluations.

Introducing! With the Accruals Balance report, a list of your employees and their available time off – vacation, sick, or other – is easily displayed for the date you choose.

Introducing! Now, Manage Security offers the option to limit access to the Define menu which locks your drop-down lists and auto accrual time-off policies so other managers cannot make modifications.

Improved! Scan multiple-page documents directly into one file with Staff Files enhanced scanning options.

Improved! Filters and sorts for city, state, country, and manager add even more flexibility.

Improved! Employee List options have been expanded to include any field from the General, Emergency, and User tabs.

Improved! Now add signature lines to your Employee Evaluations report for performance review records.

Improved! Use the Accruals Activity report to display all earned and deducted transactions, plus any adjustments made according to your auto accruals policies. You will see the beginning balance, ending balance, and all activity for the date range you choose.

Efficient

- Organize employees by department or by location if you are maintaining information for multiple facilities.
- Keep employee emergency information readily available—contact name and number, physician name and number, even special notes—with space to record both primary and secondary contacts.
- Import employee photos and other important documents such as I-9 forms, licenses, and resumes with the file management features in the Documents tab.
- Group enrollment tools are time-savers that provide the option of using batches to enroll a group of employees at one time in auto accrual policies and training programs versus enrolling each employee individually.
- Training tab displays total hours of training by category and searches records for employees that may be missing a particular training.
- Auto Accruals wizard uses your Accrual Accounts and Accrual Policies for a simple solution to setting up and tracking accruals automatically, like vacation and sick time.
- The Incidents tab affords more consistent reporting of disciplinary actions, warnings, accidents, or other workplace occurrences.
- Track wage histories and current pay rates.
- Enter and update employee data with the convenience of text file imports.
- The user interface includes monitor optimization to 1024 x 768.
- Print mailing labels and phone lists.

Flexible

- Staff Files and Staff Files Pro are compatible with Windows 7.
- HR Documents puts a complete library of professional HR templates and PDF files at your fingertips, which you can quickly customize and produce. Your company's details, complete with contact information and logo, are automatically included on all HR materials produced. (for Staff Files Pro users)
- Prepare over 30 different reports, including reports for accrual balances, reminders, absences, and separations.

- The benefit reports provide simple access to the details about employees enrolled in your benefit plans. The Benefits by Plan staff report lists all enrolled employees by benefit plan, and it subcategorizes by plan, such as healthcare, dental, or retirement. The reports list the employees' names, enrollment date, employee contribution, and employer contribution.
- Ready-to-use templates for evaluation forms, new hire checklists, separation checklists, and more are included – you can use them as is, or modify each to suit your needs.
- Absence Calendar gives you a visual representation of when employees are out of the office, for example on vacation or out sick, including the start date and end date.
- Use the expanded import options for text files for employee number, cell phone, fax number, I-9 renewal date, position, and the fields from the Emergency tab, in addition to 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, and birth date.
- In the Employee Training report, the Training Category column displays total hours of training by category. The Training Expirations staff report displays a list of employees whose training has expired and employees who have not yet attended the particular training.
- Create different sets of performance evaluations for each location, department, and position. Choose the evaluation categories that are specific to each group of employees. Plus, include a description for each category, so when managers fill out the evaluation form or when employees read their evaluation, everyone will have a better understanding of the criteria for each category.
- With the name format options and column you see more at one time, and you choose the way you want the names displayed.

Effective

- Audit trail tool helps companies keep a log of activity, such as changes made to records and by whom, when multiple users have access and make entries. (for Staff Files Pro users)
- Use employee-specific reminders to keep current on individual performance evaluations, training requirements, or other items you can define to fit your workplace.
- Create repeating pop-up reminders to keep you informed of common all-employee events and details, such as birthdays, certification expirations, and I-9 renewals.
- Complete thorough performance evaluations by scoring employees on categories, such as availability and job knowledge, and include detailed comments.
- Spot trends in why people leave your company with the Separation Reason field of the Staff Separation by Date report. In the report, you can see how long employees worked at your company before they left, the manager they reported to, and the reason for the separation.
- COBRA tracking can be recorded in the Separation Tab. Store enrollment date, declined date, payment amount, end date, and miscellaneous notes for COBRA. Use the COBRA staff report to display your former employees' information by separation date.
- Create, edit, and publish letters for benefit notifications and other workplace communications.
- Check which benefits employees are enrolled in, and when they will become eligible for additional benefits.

- Record general employee information—social security number, EEO code and category, hire date, position, and W-4 status.
- Define your own list box items for tab information fields to customize Staff Files and Staff Files Pro so they meet your unique workplace needs.

Secure

- Segment security access by department and provide managers access to their department-specific Staff Files and Staff Files Pro information.
- Restrict access to confidential information with password protections – even create a password to protect your Microsoft Access database from unwelcome viewing.

About this Guide

The Quick Start guide focus is how to use the Staff Files programs and it's written for end-users who have a need to enter, maintain, and update confidential employee information.

The best way to quickly become familiar with Staff Files is to review the basics in these sections.

Introduction
The introduction section provides a basic description of features and functions.

Installing Staff Files
This section explains how to use the Setup program to install the software. You can install Staff Files or Staff Files Pro for use with Windows 2000 or higher. The section covers installation for both single- and multi-user versions.

Getting Started – A Quick Tour
This section is an overview with how-to instructions for various features presented in a simple, step-by-step format.

Setting Your Specifications
Find instructions for setting up the program to meet your company-specific requirements.

This guide assumes you are already familiar with Microsoft® Windows 2000 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.

Introduction

This section explains how the conventions of the guide and additional resources available to help you understand the features and functions of the program.

What's in this section

Quick Start Guide Conventions

Refer to the following conventions when becoming familiar with the program:

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. 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.

In the Help menu, you will also find an online feedback form you can use to share your comments and suggestions about Staff Files and Staff Files Pro.

We encourage and appreciate all customer feedback. It is valuable in shaping the future versions of these products and improving the service and support we provide our customers.

Technical Support

We're here to help you… If you can't find the answer to your question after consulting the Help topics, contact Technical Support.

Internet E-mail:	support@abs-usa.com
World Wide Web:	http://www.abs-usa.com
Telephone:	1-701-235-5226 8:00 a.m. to 5:00 p.m., CST Monday through Friday

Free Technical Support Period:

ABS offers 90 days of free technical support to registered Staff Files users. Free technical support starts from your date of purchase. Thereafter, there is a $35 charge per incident. ABS also offers 12-month, unlimited Technical Support Plans and Software Enhancement Plans. For just pennies a day, we can help keep your software up and running.

Support Plans:

- Unlimited telephone and e-mail access to ABS Support Technicians
- **Free** media replacement should your software become lost or damaged
- **Free** updates to address compatibility issues (does not include upgrades)
- For Support Plan pricing, please call 1-800-874-8801

Software Enhancement Plans:

ABS offers a 12-month, Software Enhancement Plan entitling you to **Free** upgrades, in addition to everything included in a Support Plan. For Software Enhancement Plan pricing, call: 1-800-874-8801.

Installing Staff Files

This chapter describes how to install Staff Files and Staff Files Pro to run under Microsoft Windows 2000 or higher for both single- and multi-user versions.

What's in this section

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 256 MB of memory.
- One CD-ROM drive and a hard disk, with at least 120 MB of free disk space for program files, plus additional disk space for personnel data files.
- Windows operating systems: 2000/NT*/XP/Vista/7.
- A mouse and monitor supported by Microsoft Windows 2000 or higher.
- 1024 x 768 screen resolution or higher.
- An optional printer supported by Windows 2000 or higher.

**NT is supported only when acting as a server in multi-user, client/server environments.*

How to Install Staff Files

Be sure you are logged in as "Administrator" or have administrative rights to install the application. We also recommend that you close all applications, including screen savers or similar programs, before running the Setup program. (If you purchased a multi-user version of Staff Files or Staff Files Pro, use these steps to install the software on each individual workstation.)

Follow the instructions listed below to install Staff Files using Windows 2000 or higher.

1. Insert the **Staff Files** CD into your computer's CD ROM.
2. The Setup program should run automatically. If not, complete the following steps.
    - Click on the **Start** button.
    - Select **Run** from the **Start** menu. The **Run** dialog box is displayed.
    - Type **d:\setup.exe** in the dialog box (use the appropriate drive letter for your CD-ROM).
    - Click **OK** or press the **Enter** key.

    NOTE: The Setup program can not run automatically if Autorun is inactive.

The Setup dialog box will be displayed. Complete the setup by following these steps:

1. Click **Next** at the Welcome screen and the license agreement is displayed. After reading it the license agreement, click **Next** to accept it.

2. The **Installations Options** screen appears. Select the “Anyone who uses this machine” option to allow other users access to the program on your PC. Or, select the “Only for me” option if you are the only user that should access the application on your PC. Then, click **Next**.

3. The **Destination Location** window is displayed. The Setup program will install Staff Files software to the directory c:\Program Files\Staff Files. It will automatically create the directory on your hard disk, if you haven’t done so already.

   To install the program to another directory, click **Browse** and enter or select a destination directory. Click **Next**.

   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.

4. The Start Installation screen is displayed. Click **Next**, and Staff Files starts to copy the program files to the designated directory and updates the system configuration.

5. 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.

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

7. Start your Staff Files application by double-clicking the desktop shortcut.

How to Install Multi-User Versions of Staff Files

1. Follow the instructions listed on page 6 of this section to install a multi-user version of Staff Files using Windows 2000 or higher.

2. The **Network Wizard** is automatically launched when Staff Files runs for the first time on a workstation. This wizard is used to set up the location of the database, and to share that folder. Click **Next** at the Welcome screen.

3. After a search of the network has been completed, an installation options dialog box will appear. If this is the first time a multi-user version of Staff Files is installed to a computer on your network, then you will need to select Option #1; if not, then select Option #2.

Continue setup with the procedure for **Option #1** or **Option #2**.

Option #1:

1. Click **Next**, after selecting Option #1.

2. The database will be installed to the directory, c:\Staff Files folder. To install the database to another directory, click **Browse** and select a destination directory. Click **Next** to create the directory.

3. Click the **Share** button to share the folder. The Staff Files Properties dialog is displayed.

   - **Windows XP Home/Pro (with Simple File Sharing):**
     Mark the Share this folder on the network and Allow network users to change my files check boxes. Then, click Apply and OK.

   - **Windows XP Pro/ NT / 2000:**
     Select the Share this folder option, then select the Maximum allowed option in the User limit field. Click Apply. Next, click the Security tab and select Users or Everyone, and give full control by marking the Full Control check box.

4. Click **Next.**

5. Click **Finish.** Staff Files is automatically launched.

Option #2:

1. Click **Next**, after selecting Option #2.

2. Locate the Staff Files database by choosing an automatic search of the network (this could take several minutes), or by clicking **Browse** to search yourself.

3. Click **Next** when you have located the database.

4. Click **Next** and **Finish.**

Using Your Own Database

If you have your own database, and wish to use it instead of the one in your Staff Files folder, both single-user and multi-user versions should complete the following:

To set your database:

1. Rename the databases in the Staff Files 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 How to Install Staff Files. 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 to learn more about using Staff Files software.

Getting Started *A Quick Tour*

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

What's in this section

Starting Staff Files

The Staff Files and Staff Files Pro programs provide an easy-to-use, intuitive interface. The design is based on something you are already familiar with—file tabs. The file tabs presented in each system 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. Begin by clicking **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, you're asked if you wish to use **Sample data** or **Live data.**

5. Click the **Live data** button.

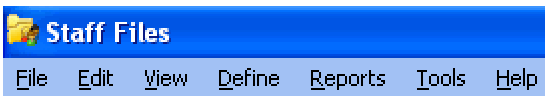
The Staff Files program screen appears with **Current Reminders** at the front. You can see how the reminders you set will be displayed.

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

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 to use 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 www.abs-usa.com, or call 1-701-235-5226 for more details.

The **Photo** button allows you to add a photo to the employee's record.

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

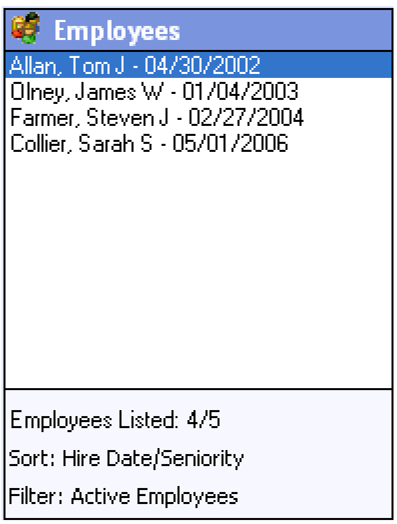
Tabs

Below the tool bar's quick-action buttons, you'll find the 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**, **Birth Date**, **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

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 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

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 **Add** button and a new line is displayed.
4. Click in the new line and enter “Maternity.”
5. Click the **Close** button.
6. In the **General** tab, click on the drop-down arrow for the **Status** field. “Maternity” is now in the list.

The **Define** menu allows you to define items for the following: **Accrual Accounts**, **Department**, **EEO Category**, **EEO Code**, **Location**, **Position**, **Status**, **W-4 Status**, **Wage Type**, **Benefit Categories**, **Checklist Items**, **Evaluation Categories**, **Incident Categories, Note Categories**, **Training/Certification**, **Document Categories**, **Reminder Settings**, **Filters**, **Sorts**, 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.

To use hot keys:

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, (**EEO Code** and **EEO 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 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 thirteen different categories.
- The **Define** menu is used to define items you can customize to your needs.

Setting Up Your Staff Files

This section 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**.

What's in this section

Set 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.

Define Menu

Before entering employees and their information, you want to define list items specific to your company using the **Define** menu. You may choose to limit access to the **Define** menu to keep some or all managers from making changes to your company-defined information, such as accrual policies. You can do so using Manage Security settings in the **File** 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
- Incident Categories
- Note Categories
- Training/Certifications
- Document Categories
- Reminder Settings

For example, 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.

You will repeat this procedure as you move through the Define menu setting your own specifications. You can edit or delete the changes you make at any time.

Define Accrual Accounts

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 accrual accounts 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.**

Define Auto Accrual Policies

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

Two common accruals that companies offer employees are vacation and sick time. 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 create an **Inactive Auto Accrual Policy using a custom accrual period** to temporarily withhold employee accruals during the inactive period, such as for a short-term disability. 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 an 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 and Staff Files Pro process 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 only **Accrual Rates** for the new policy. This rate applies to new employees who have been with you less than one year and who will accrue time at a different rate than those employed for more than one year.

   NOTE: You can control the accrual rates during each month of the first year of employment.

   (In a following step you define rates for employees that have been with you more than one year using a seniority table.)

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 accrual rates used for employees enrolled in the new policy after their first year. These rates begin to accrue when the employee has been with you more than one year, and the rates here are based on their length of employment.

    To use the seniority table:

    - Click the **Add** button to add a seniority record.
    - Enter the **number of years of service** required.
    - Enter the **number of days or hours** to be accrued each month.
    - If applicable, enter **maximum amount of unused time** that will be carried over in the next year.
    - Enter the **maximum number of days to be accrued**, or select N/A if this is not applicable, and click **Save**.

    NOTE: If you do not use seniority to calculate accruals, enter a single seniority record to indicate the amount to be accrued after the first year of employment.

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.

Change a Field Label

Staff Files and Staff Files Pro provide additional flexibility for customizing your employee records by allowing you to change the field labels displayed in the tabs. For example, you may want to change the Department label that is displayed 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.

Enter Dates

Date information fields (Birth Date, 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 and Staff Files Pro allow you to set the order 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, and you can edit or delete sorts as needed.

Define a custom sort:

1. Click **Define** from the menu bar and select **Sorts**.
2. Click **New** in the **Sort** 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 is displayed in the drop-down list when you select Sort from the **Define** menu, or when you click the Filter and Sort button in the tool bar.

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 custom sort:

1. Click the **Sort** button in the tool bar. The **Filter and Sort** dialog box is displayed.
   Or, from the **Define** menu, select **Sort.**

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

3. Click **OK**.

NOTE: If necessary, you will also choose a Filter.

Custom Filters

Staff Files and Staff Files Pro allow you to build your own filters to increase 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.” You can edit or delete filters, as needed.

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**, and 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**.

Set Up & View Reminders

Staff Files and Staff Files Pro feature 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, allowing 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. The built-in reminder system also has a function that allows you to view all reminders.

Additionally, you can define up to five of the date fields in the **User** tab and set them up as customized, universal reminders for such things as parking pass expirations.

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

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

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

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.

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.

Manage Security

Staff Files and Staff Files Pro have a multi-level password system and flexible access settings. 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 set manager access to view information for their specific department only, and lock the **Define** menu to keep company-defined information, such as accrual policies, safe from alterations. You can restrict access to your reports as well, and limit the ability to delete employee records.

You can choose between Windows Authentication and Staff Files Authentication. And, if you are using your Staff Files or Staff Files Pro information in a Microsoft Access database, you can also define a password to protect the information from being manipulated through Access. Restrict access to your reports as well.

NOTE: It is recommended you first install Staff Files or Staff Files Pro on the administrator machine and set up user access and rights. Then, install Staff Files or Staff Files Pro 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. Go to the **Authentication** tab and be sure that the authentication setting here matches the authentication scheme used to gain access to the users' computers.

   NOTE: Windows Authentication is the recommended authentication setting. If Staff Files or Staff Files Pro is already set for Windows Authentication, the setting button will display "Change to Staff Files Authentication" and no action is required. If the setting button displays "Change to Windows Authentication", click the button to make the necessary change.

3. Go to the **Users** tab, and enter or select the user you are setting up for security.

   Or, choose **Add**, if you're entering a new user that isn't already 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 item you are allowing the user to access.

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. Go to the **Database Password** tab and enter the password to be used for accessing the Microsoft Access database, if you choose to use this optional feature.

8. Click **Close** when you are finished.

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

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