

Personnel Manager 4.0 Installation and Tutorial

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INSTALLATION AND TUTORIAL

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Welcome to Personnel Manager, part of a series of grant cost management tools developed by Northern Lights Software.

Personnel Manager puts instant personnel cost projections at your fingertips. Easy enough for a novice, yet comprehensive enough to allow for fully accurate cost predictions, Personnel Manager turns the guesswork of projecting personnel charges of grants into a simple, precise science.

The "business" of sponsored research requires putting considerable effort into obtaining and managing the supporting funds. In applying for a grant, accurate budgets must be projected for personnel, equipment and supplies. After the grant award, careful tracking and management of costs is essential to successful implementation of research projects.

Using Personnel Manager, you will be able to produce accurate projections of personnel costs through quick keystrokes or menu choices. Pre-award, it can produce precise personnel budgets to use in your proposals. Post-award, it can help you allocate personnel fund, by providing an accurate preview of the effect of salary distributions to various grants.

In some ways, Personnel Manager is like a computerized three dimensional spread sheet, that allows you to play "what if" games with you people's salary distributions, until you find exactly the right way to charge salaries to grants.

In other ways, though, Personnel Manager is like no other software you've seen. It presents cost projections through a unique time line graph, showing you the "big picture" at a glance. With its modern, intuitive user interface Personnel Manager is an excellent example of the new breed of software which is easy enough for novices, and still convenient for experts.

To install and get a fast start to the system, please read the introduction and go through the simple tutorial. You can find answers to any additional questions beyond the first two chapters in the reference section of this manual, which covers each function and shortcut in detail.

I.1. INTRODUCTION

This document supports both the demo and the full Personnel Manager 4.0 versions. Whether you are using Personnel Manager 4.0 for the first time or upgrading from a previous version, you will save a lot of time and effort by going through the tutorial before you begin using the software to manage your salary expenditures. This document:

- describes the most important features of the program;
- helps you install Personnel Manager 4.0/Windows and Mac on your computer; and
- leads you through a comprehensive practice session to teach you how to use the program most effectively.

We developed Personnel Manager 4.0/Windows using the Microsoft FoxPro™ development system. We chose this platform for its superior speed, its easy portability across different operating systems, and its simple installation and reasonable memory requirements.

Personnel Manager 4.0/Windows has been tested on Windows 3.1, 3.11, 95 and NT 3.x through 4.x. Personnel Manager 4.0/Mac has been tested on Apple Macintosh (PowerPC platform, System 7.5 OS and higher.)

I.1.1 MAIN CHANGES FROM PERSONNEL MANAGER DOS TO PERSONNEL MANAGER 4.0:

- Year 2000 compliant Properly handles dates up to 12/31/9999.
- enhanced standard reports Standard reports with a preview -option use Windows/Macintosh fonts and can print to any printer supported by the operating system.
- drop down menus The Personnel Manager menu system uses the standard Windows and Mac menu conventions.

Web: www.microweb.com/nlights

I.1.4 PROGRAM REQUIREMENTS

To run Personnel Manager 4.0/Windows, you will need to the following minimum hardware and software configuration:

I.1.4.1 WINDOWS

- Microsoft Windows 3.1 or higher, or Windows NT 3.x or higher
- MS/PC DOS 3.1 or higher (version 5 or 6.x recommended)
- 8 MB RAM (16+ MB recommended)
- VGA 640x480 monitor (800x600 or higher resolution preferred)
- 9+ MB of free disk space for the original installation

I.1.4.2 MACINTOSH

- Apple OS 7.5 or higher
- PowerPC/G3 processor or higher
- 9+ MB of free disk space for the original installation

I.2. INSTALLING PERSONNEL MANAGER 4.0/WINDOWS AND MACINTOSH

If you already have a Personnel Manager/DOS on your computer

Make sure that you don't install the new version into the Personnel Manager directory (usually named \PM.) The PM 4.0 installation program automatically installs the system to C:\PMGRWIN subdirectory, unless you specify another disk or subdirectory during installation.

I.2.1.1 INSTALLATION

To install the program:

I.2.1.1.1 Windows

The enclosed installation diskettes include an installation program and all necessary data (about 9 MB) in a compressed form. The installation program creates a \PMGRWIN directory (or other directory you specify), uncompresses files from the installation diskettes to that directory, and for Windows creates a program group and an icon.

You can follow the same instructions for individual and network server installations.

1. Start Microsoft Windows.
2. Insert Disk 1 into A: or B: drive.
3. From Program Manager top menu bar, select the File menu and choose Run.
4. Type A:\Winstall (or B:\Winstall) and press [Enter].
5. Follow the on-screen instructions.

The installation process loads the program and all of its necessary files onto the specified subdirectory (and branching subdirectories) on the specified drive. On some networks the installation program may not recognize the type of drive you are installing the program on. If the installation procedure asks you what type of drive you are installing the program on, select the Hard Drive -option.

Once the installation is complete, you may want to create a shortcut on your desktop for easier access to the program in the future. To do that, locate the PMGR.EXE -file on your file manager ("My Computer"), right click it, select "Create Shortcut" and drag the resulting shortcut icon onto your desktop.

6. Edit your AUTOEXEC.BAT and/or CONFIG.SYS files

If your computer is connected to a Novell network or if you are running Windows for Workgroups version 3.11, Windows 95 or Windows NT, you can ignore the instructions regarding the SHARE statement.

AUTOEXEC.BAT:

Some systems place the SHARE statement in the AUTOEXEC.BAT file. If you find a SHARE statement in this file, add the F: and L: statements as follows: C:\DOS\SHARE /F:8120 /L:2048 (if your OS program files reside in \DOS -directory on C: -drive.) Be sure to put one space between "SHARE" and "/F:8120," and one space between "/F:8120" and "/L:2048." If you do not find a SHARE statement in your AUTOEXEC.BAT file, look in the CONFIG.SYS file. Again, this modification is not necessary if you are running Windows for Workgroups 3.11, Windows 95 or Windows NT, or if your computer is connected to a Novell network.

If your AUTOEXEC.BAT file includes a SMARTDRV.EXE command, you may want to limit the SMARTDRV memory usage to 512K while running Windows. On some systems, limiting SMARTDRV memory usage will protect Personnel Manager from occasional memory -related crashes. The SMARTDRV statement should read:
SMARTDRV /X 512 512

CONFIG.SYS

Make sure that your Config.sys -file has a following statement:

```
FILES = 100
```

This is necessary, since Personnel Manager needs to open many files at the same time. Personnel Manager installation will make this modification automatically, if you allow it to change your Config.sys -file during installation.

There are a few other modifications you may need to make in order to guarantee a smooth system. Windows has been known to have problems with the HIGHSCAN -option in the EMM386 -statement in the CONFIG.SYS file. Microsoft suggests that Windows users should delete the highscan option from the DEVICE=EMM386.EXE -line, if it is there. Additionally, if you have a RAM -statement on the EMM386 -line, you should delete it as well, unless you absolutely have to have it there for some other applications. The RAM (expanded memory) option is generally used only if you are running large spreadsheets in DOS. Windows applications do not need the RAM statement.

You can modify these settings for example with the DOS editor (see your DOS manual for instructions on using the DOS editor).

7. Close Windows.
8. From the DOS prompt, press [Ctrl][Alt][Del] to reboot your computer.

I.2.1.1.2 Macintosh

1. Insert disk 1 of 3 in diskette drive
2. Open the diskette (double click on the diskette icon)
3. Double click on the Installer -icon
4. When the installation program prompts you for a folder where to install the program, you can click Install to install it to the default "*Personnel Manager 4.0*" or "*Personnel Manager 4.0/Demo*" -folder on your hard disk. You can also specify a different folder and/or disk by using the "Select" -dialog window. For example, if you selected folder "Programs" on your hard disk, Personnel Manager would be installed in a new "*Personnel Manager 4.0*" or "*Personnel Manager 4.0/Demo*" folder on the "Programs" folder.
5. When the installation is complete, you may want to create an alias for the program, which you can launch directly from the "desktop". To do that, highlight the PMGR.EXE -program file and press Command+M. Then drag the alias icon onto your desktop.
6. We recommend restarting the computer before actually running the program, so that all of the necessary system files are properly initialized after the installation.

I.2.1.2 NETWORK TIPS -- WINDOWS

Personnel Manager can be used as a single user program or as a multi-user program, with optional network licenses. To avoid "sharing violation" errors when running two or more concurrent Personnel Manager sessions on a network, the installation program sets the read-only attribute on all *.FLL, *.FON and *.EXE -files. If you want to uninstall Personnel Manager at some point, you will need to turn the read-only attribute off on all files in the main Personnel Manager directory, before attempting to delete the application files (you can do this via the Windows' File Manager program.)

You need to map network drive to a drive letter when running Personnel Manager on a network (Personnel Manager does not understand UNC -addressing -- e.g., \\Main Server\Hard Disk.) To map a network drive go to network neighborhood, left click on the network drive where Personnel Manager resides, click "Map Network Drive" and select a drive letter. Check "reconnect at logon" to have the drive automatically mapped every time you start Windows. Now you can use the drive letter in the target path for your Personnel Manager icon on the network station.

If you are running on a Novell network, make sure that your Novell session has at least 100 file handles allocated.

1. Go to your Novell configuration directory.
2. Open (or create) the NET.CFG file.
3. Insert the following line: FILE HANDLES = 100. (make sure to insert a space between FILE and HANDLES)

If there is a FILE HANDLES statement already in the configuration file, make sure that it calls for at least 100 handles. If the number is higher, leave it set to the higher number.

I.2.1.3 NETWORK TIPS -- MACINTOSH

You can set up your Personnel Manager 4.0/Macintosh networking in two different ways -- server or Client/Server.

1.2.1.3.1 Server Networking

Server networking is the easiest to set up and maintain, but it runs slower than server/client setup. With server setup, the program runs programs, creates temporary files and accesses data files directly from the server.

To set up server networking, you need to first install Personnel Manager temporarily on each workstation that needs to have access to it. The reason for this is that the installation procedure copies some necessary files to the System Fonts and System Extensions folder. Personnel Manager will not run properly if these files are not present on each station. Once the installation is complete on each workstation, you can simply drag the entire Personnel Manager folder to the trash can. This way the application will not take up space on your local hard disk, but the system files will be installed properly.

Next you would install Personnel Manager on the server and leave it installed over there. The last step would be to set up a Personnel Manager alias on each network station, pointing at the PMGR.EXE -file on the server.

1.2.1.3.2 Client/Server Networking

Client/Server networking divides computing tasks between two different computers, and uses local hard disks on network stations to speed up operations. With Client/Server setup, you will set up a Personnel Manager client on each workstation with a special address file that tells the program where to look for its data. Each workstation runs the Personnel Manager program directly from its own hard disk, creates temporary files on its hard disk and runs reports from there as well, but reads and writes the actual data on the server.

To set up Client/Server networking, install Personnel Manager Client software on each workstation and the Personnel Manager Server software on the server. On each workstation, you will need to modify the PMGR.INI -file on the Personnel Manager folder to include the address of the server installation. For example, if the server shows up on the workstation's desktop as ServerHardDisk and Personnel Manager is installed in Personnel Manager -folder on the server's hard disk, the address on the PMGR.INI file for that workstation would read:

DATAPATH=ServerHardDisk:Personnel Manager:

IMPORTANT: When you get program updates to Personnel Manager, you need to remember to run the updates on the server and all workstations. With Server Networking setup you only need to update the Personnel Manager application on the server.

1.4 Performance Tips (Windows)

If you are using caching software such as SMARTDRV, we recommend limiting WINDOWS cache to 512K for best Personnel Manager performance, especially if your system has only 4MB of RAM memory. See your DOS manual for instructions for SMARTDRV settings. If you are using Windows for Workgroups 3.11, we recommend setting the internal Windows cache between 1024 if you have 8MB or less of RAM, and 2048K if you have over 8MB of RAM on your system. You can set the cache size via the Control Panel / 386 Enhanced / Virtual Memory -option (see below.)

For best performance under Windows 3.1 and Windows 3.11, we recommend setting your Windows Swap File as a "Permanent", preferably over 8 megabyte partition (you don't need to worry about these settings in Windows 95 and NT.)

1. From the Windows Program Manager, open the Control Panel.
2. Click the 386 Enhanced icon.
3. Click the Virtual Memory button.

If the current size is less than 8,000KB,

4. Click the Change >> button.
5. In the New Size field, type 8000.

6. If available, turn on the 32 bit disk and file access features. Check your Windows or hard drive and controller manuals to see if your system is compatible with 32 bit disk and / or file access feature.
7. On Windows for Workgroups, limit the cache to 512K, if you experience regular "General Protection Failure" crashes while running Windows software.
6. Click OK.
7. Follow the Windows instructions for closing Windows.

This release includes the following functionality:

- Full Y2K compliance
- Data import from existing Personnel Manager/DOS
- Complete data entry capability for entering grant and personnel data, various salary schedules and hourly time tracking
- Visual "Gantt" -type chart for displaying participants, timelines and percentage of effort for personnel and/or grants
- Salary distribution report for individuals
- Projected personnel costs report for grants
- Posting to Grant Manager

I.3. TUTORIAL

I.3.1 INTRODUCTION

The problem of projecting personnel costs for several grants and several people is three-dimensional. The list of people involved forms one of the dimensions, the list of grants a second dimension, and time the third dimension. You can think of the data required to track the salary distributions as occupying a three-dimensional cube. Since a computer screen is only two-dimensional, it can only display cross sections of this cube. There are three possible cross sections. One section can show all the people charging a *single* grant as a function of time. Another can show all the grants being charged by *one* person, again as a function of time. Finally, a third can display all the people and all the grants, who is charging which grant and how much -- but only for *one* instant of time.

Personnel Manager can display either of the first two kinds of cross sections. The third is of limited use, since it can only show one instant of time.

The first cross section is called the *grant timeline screen*. It shows all the people charging a single grant as a function of time. This screen shows the projected personnel costs for that one grant. It also shows you the projected ending balance for the personnel budget of the grant.

The second cross section is called the *person timeline screen*. It shows all the grants a given person is charging. This screen displays how a person's salary is distributed among one or several grants.

In both of these screens, the horizontal dimension is *time*. The vertical dimension is a list -- of *people* in the grant timeline, and of *grants* in the person timeline.

I.3.2 PROGRAM STARTUP

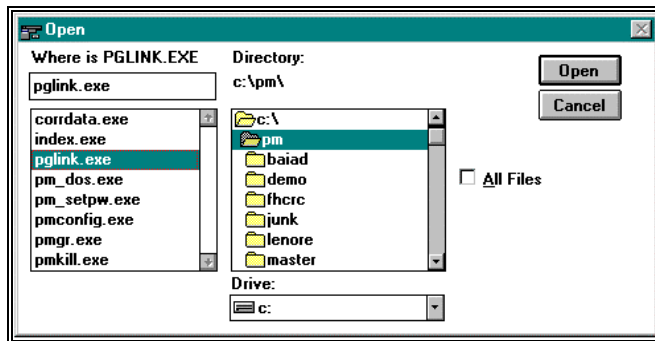
Start the program by double clicking the PMGR.EXE -icon in the Personnel Manager folder. Once the main screen is up, you can proceed to enter personnel, grant and salary schedule data into the system. If you have already entered data into Personnel Manager/DOS -version, you should import it now, because the data import routines will overwrite your existing data on the new Personnel Manager. If you don't need to import data, you can skip over section 2.1.

I.3.3 IMPORT DATA

Before you import existing Personnel Manager/DOS data, make sure that you are not running the old Personnel Manager program at the same time. If your Personnel Manager/DOS data is password protected, you should remove the password while importing the data. To remove the password, run the PM_SETPW.EXE -program on your Personnel Manager/DOS folder and leave the New Password -field empty. After you have successfully imported the data, you can re-protect the DOS data by running the PM_SETPW.EXE again and entering a password.

NOTE: If you want to import Personnel Manager/DOS data to Personnel Manager 4.0 Macintosh, you can create a temporary folder for PM/DOS on the Mac, copy all files from the Personnel Manager/DOS folder to the temporary Macintosh folder and then follow the instructions below.

You can then run Personnel Manager 4.0, pull down the System Menu and select *Import Personnel Manager/DOS data*. The program will present you with an open file -dialog. Navigate to the disk and directory where your old Personnel Manager is installed and double click the PGLINK.EXE -file, which you should see on the left column (files).



Personnel Manager data import screen

Note: The old data will not be affected by the import routine, but any existing data on the new system will be overwritten.

When the import is complete, you can continue working with the program as usual -- editing, deleting and adding information.

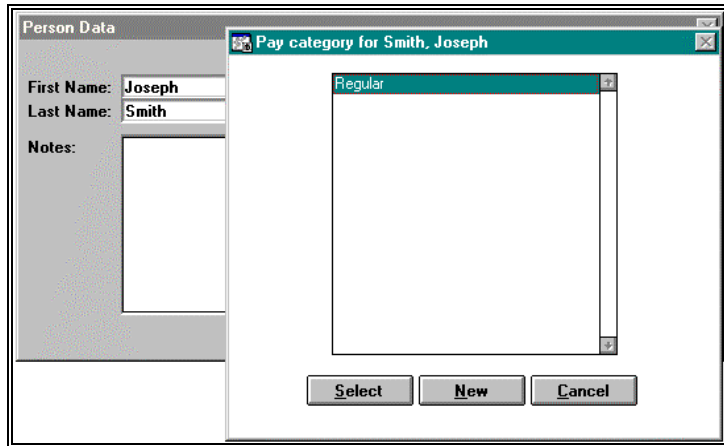
I.3.4 ADD A PERSON

I.3.4.1 PERSON INFORMATION

Click Person Menu and select *Create New Person*.

At the blank new person screen, type in the person's first and last name and possible comments.

- Let's enter Joseph Smith as our sample person.
- At this screen, you also have the option to select the Principal Investigator from any of the existing person records. We will skip that step for now, however.
- To save the new record, press [ESC] and [ENTER] or Click *Exit* and press [ENTER] or click *Yes* at the Leaving Changed Person Record -window.
- To enter salary schedule data for Joseph Smith, click *Yes* at the Salary History Data Missing -window.
- The program opens the "Pay Category" screen. Click *Select* to select the default "Regular Pay Category". (NOTE: You could also create a different, new pay category by clicking *New* and entering a different category -- e.g., hourly -- on the "New Category" screen.



Person Data and pay category setup

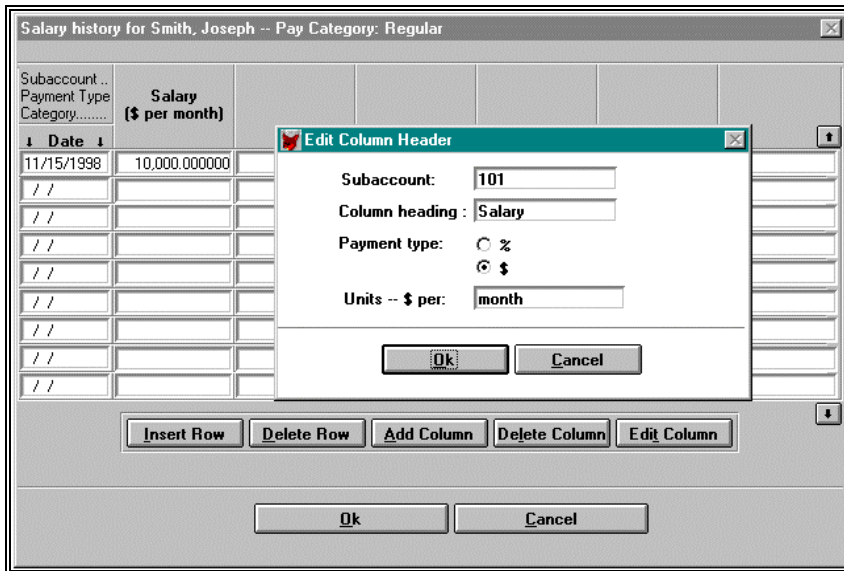
I.3.4.2 PAY PERIOD ENDING DATE

- At the "Pay Period Ending Date" -screen select *Last Day of the Month*.

You can change pay period types (weekly, bi-weekly, monthly, etc.) by moving the green highlight with up and down arrow keys, and pay dates by moving the red highlights with left and right arrow keys. Once you have set up the desired pay period type and pay date, you can select it by pressing [ENTER]. (NOTE: If you select *Last Day of the Month* as the type, you do not have the option to set the pay date, since it will always be the last day of the month.)

I.3.4.3 SALARY HISTORY -- SALARY AND FRINGE CHARGES OVER TIME

- At the "Salary History" screen, enter 11/15/98 in the date field (the program expands 98 to 1998.)
- Press [TAB], type 10000.00 (ten thousand).
- Click *Edit Column* to set up subaccount and other pertinent information for this salary column.
- Enter 101 into the subaccount column and click *OK*. (NOTE: By default the amount you entered (10,000) is treated as salary per month. You could change it to for example salary per year by simply changing the "Units -- \$ per" text from month to year when editing the column.)
- Click *OK* to save the column heading setup.



Salary history setup

Let's set up fringe benefits for the selected person next.

- Click *Add Column*, enter 102 into the subaccount column, type Fringe into the column heading field, and Salary into the "Units -- % of" -field and click *OK*. Next, type 15.55 for the fringe rate. From this point on, the system will automatically calculate 15.55 % of salary for each pay date and add it to the salary expense for the selected person.

You can change salary or fringe rates over time by adding data to new rows on the screen. You could also add expenses to each pay date by adding new columns (e.g., Vision Care). These expenses can be set up as a calculated percentage of existing columns, or as straight dollar amounts. For now, however, let's click *OK* to complete data entry for the selected person.

For example, if Joseph Smith received a 2,000/month salary increase on 5/1/1999, you could enter the date in the next empty date field, then enter 12000 in the first, "Salary per Month" column and again 15.55 in the second column (fringe.) The program would now calculate his salary at 10,000/month and his fringe benefit amount at 1,555/month until 5/1/1999. From that date on until the end of the grant, the program would calculate his salary at 12,000/month, and his fringe amount at 1,866/month.

I.3.5 ADD A GRANT

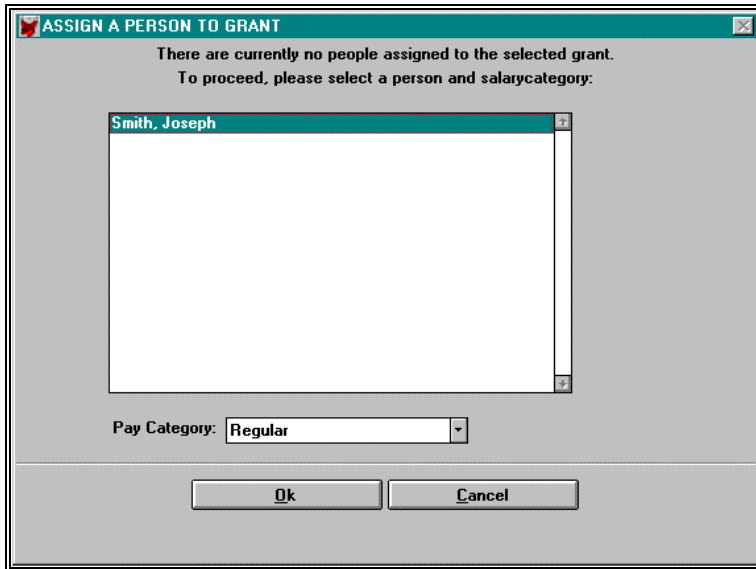
Click the Accounts menu and select *Create New Grant*.

At the Grant Screen, let's type AAA-1 as grant number, Test Grant as grant name, 01/01/95 and 03/01/01 as start and end dates respectively (the program will expand 95 to 1995 and 01 to 2001), and 100,000 as grant budget. Click *Exit* and press [ENTER] or press [ESC] and [ENTER] to save your changes.

I.3.5.1 ASSIGN A PERSON A GRANT

Now that we have a person and a grant set up, we can assign the person to the grant. Click Accounts Menu and select *Grant Screen*. Select the grant we set up previously (double click on AAA-1 or highlight and press [ENTER].) At the

"Assign a Person to Grant" -screen, select *Joseph Smith* from the list, press [ENTER], select *Regular pay category*, and click OK.



Assign person to a grant

Now the program goes to a timeline screen, showing the person(s) assigned to the selected grant. Selected timeline section for the select person is in red, unselected segments (if there are any) are in blue.

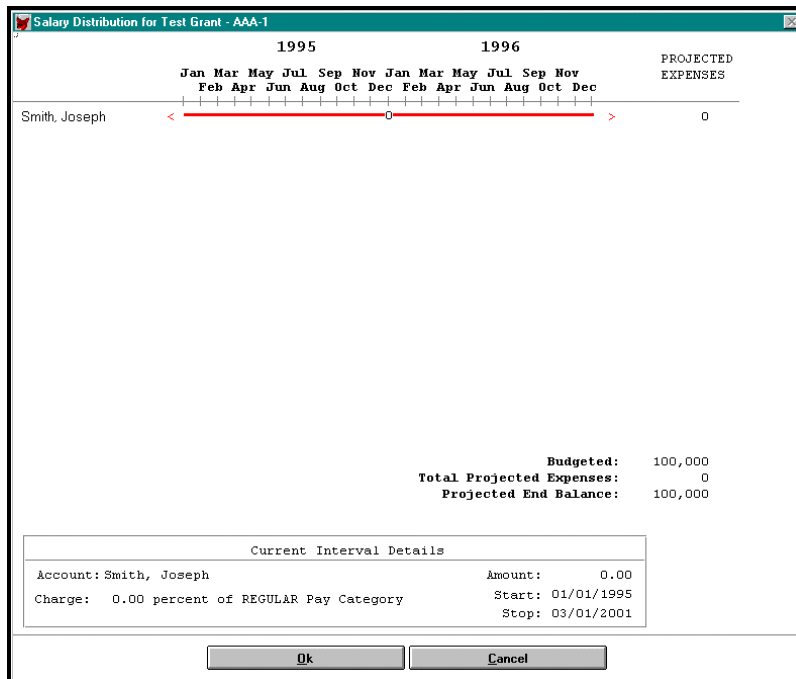


Figure I.3-1 Person timeline screen with no charges

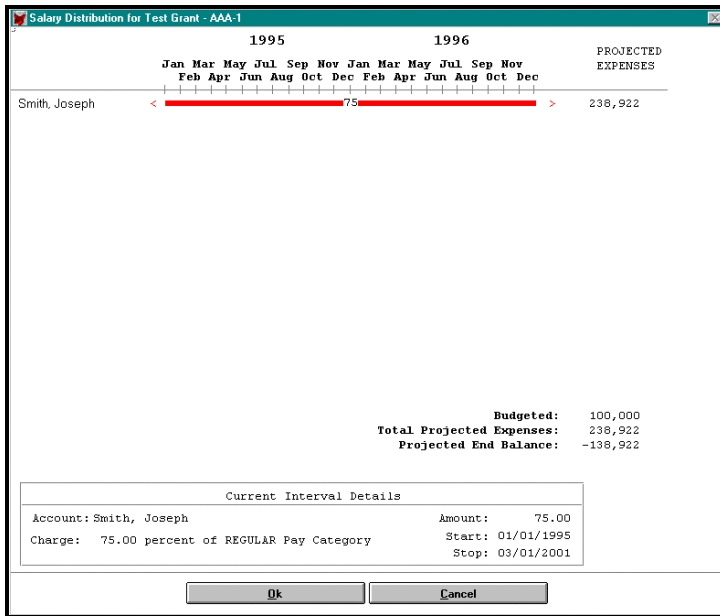
You can manipulate the timeline screen by pressing various shortcut keys, clicking the *OK* or *Cancel* buttons, or by pulling down the *Persons* or *Accounts* menus and selecting actions from there. The shortcut keys are noted on the corresponding menu choices. The following sequence demonstrates the use of shortcut keys.

The various actions on this screen are:

- Move on the screen vertically (between different persons) using the [Up] and [Down] arrows. The display will scroll if there are more people than fit the screen. Blue up and down arrows at the top and bottom left edges of the timeline display indicate whether or not there are more timelines that are "hidden" above or below the display area.
- Move horizontally (from one time period to another) with [Left] and [Right] arrow keys. You can also "pan" one screen at the time with [Ctrl+Left] and [Ctrl+Right] arrow keys.
- Change time periods and/or amounts (charge rates) by pressing [ENTER] or just starting to type a number for the percentage of effort amount, which will open data entry fields on the bottom right corner of the time line screen. For example, you could highlight a time period and simply type 100 and click *OK*, or press [ENTER] and [ESC] and [ENTER] (or simply press the shortcut "Save" key [F9]) to make the rate 100% for the selected person for the selected time period. You can revert your changes to the current data fields in this area by pressing [ESC] and N.
- Change to a different grant by pressing [F3] when the data entry fields are not open for editing. You can also pull down the *Account Menu* and select "Change to a Different Grant" from there.
- Delete currently selected person by pressing [F8]. You can make this selection from the *Account Menu*, as well.
- Add a new person to the currently selected account by pressing [F7]. You can make this selection from the *Account Menu*, as well.
- Change to the person screen of the currently highlighted person by pressing [F5]. You can make this selection from the *Account Menu*, as well.
- Print the screen by pressing [F12]. You can make this selection from the *Account Menu*, as well.
- Exit the timeline screen by pressing [ESC]. At this point, the program prompts you to save or discard any possible changes to the entire timeline. You can make this selection from the *Account Menu*, as well.

Now, let's tell the program that 75% of the selected person's total salary is charged to the current grant.

- While the person's timeline is red, simply type 75 and press [ENTER].



Assign charge rate to an account

- To save the change, press [F9] or press [ESC] and [ENTER]. You could also click *OK* to accomplish the same thing. At this point the program calculates the person's total salary with the new charge rate.

Let's say that the person's charge rate changes to 100% on 01/01/2000

- First we need to change the dates. Press [ENTER], and [TAB] to move to the second date, change the date to 12/31/1999 and press [ENTER] and [F9].
- Move along the timeline by pressing the [right] arrow key until you highlight the timeline starting on 01/01/2000, type 100 and press [ENTER] and F9.

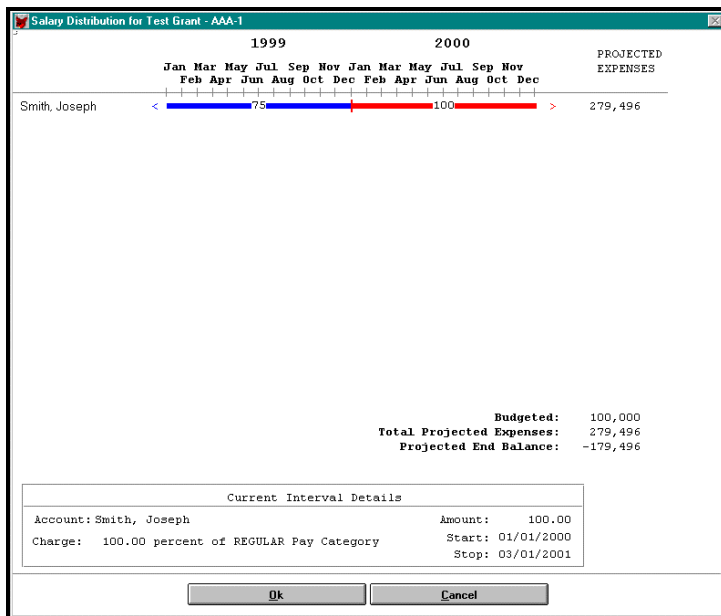


Figure I.3-2 Timeline broken into to segments

- To make sure that Joseph Smith does not get paid over 100% of his salary, highlight grant BBB-1, press [ENTER] and [ENTER], type 12-31-1994 and press [F9]. This will in effect change the ending date on BBB-1 to 12-31-1994.
- You have now "broken" the BBB-1 timeline into two 100% segments. Highlight the second segment, type 25 and press [F9].

This will create a scenario where 100% of Joseph Smith's salary is paid from BBB-1 between 1-1-1994 and 12-31-1994. 25% of his salary is paid from BBB-1 between 1-1-1995 and 5-15-2001, and 75% of his salary is paid from AAA-1 between 1-1-1995 and 3-1-2000. If you were to scroll further to the left on the timeline screen you would see that starting January 1, 2000, Joseph Smith would get paid 125% of his salary (see the purple "total" line at the bottom of the screen for total percentages.)

You can now click *OK* or press [ESC] and [ENTER] to save this scenario and exit the Person Screen.

I.3.7 SWITCH BETWEEN GRANT AND PERSON SCREENS

As we just demonstrated, you can switch quickly between the Person and Grant Screens by pressing [F5]. When you move from one screen to another, the default for the new screen is whatever is highlighted in the current one. For example, if you highlighted BBB-1 in the Person Screen and pressed [F5], the program would give you a list of grants with the BBB-1 grant highlighted. You could then press [ENTER] to select that grant and go to the Grant Screen showing all persons whose salary is charged fully or partially to BBB-1.

I.3.8 REPORTS

I.3.8.1 SALARY DISTRIBUTION REPORT (UNDER PERSONS OR REPORTS MENU)

This report shows you all grants the selected person gets paid from, as well as the percentages and date ranges. It also shows you the total percentage over time, so that you can easily see if a person is being paid a lot more or less than their total (100%) salary at any given time.

To run the report, click Person or Reports Menu and select *Salary Distribution Report* and select the person (double click or highlight and press [ENTER]) from the list. You can then instruct the program to print the report to the screen, the default printer or a specific printer.

I.3.8.2 PROJECTED PERSONNEL COSTS (UNDER ACCOUNTS OR REPORTS MENU)

This report shows you all persons that are being paid from a selected grant.

To run the report, click Account Menu and select *Projected Personnel Costs Report* and select the account (double click or press [ENTER]) from the list.

I.3.8.3 TRANSACTION PRINTOUT AND POSTING (UNDER ACCOUNTS OR REPORTS MENU)

You can use this option to print a report of every salary payment during a date range for the selected account. This report may be quite long, so you may want to preview it on the screen before printing.

You can also instruct the system to post the salary payments to a file that Grant Manager can read.

- To configure Grant Manager posting, click System Menu and select *Posting Configuration*
- Click *Change* and navigate to your Grant Manager folder
- Once there, locate and double click on the PO.DBF -file to confirm that this is the right folder.

From that point on, Personnel Manager posting will be written to the Grant Manager folder, where it can be read, interpreted and imported by the Grant Manager program.

NOTE: To run the Personnel Manager posting successfully, you must enter account and subaccount numbers in the Personnel Manager in exactly the same format as they have been set up in Grant Manager.

I.3.9 FILE MAINTENANCE

At the Edit Person or Edit Grant screens you can:

- Add new records ([CTRL+N])
- Delete ([CTRL+D]) existing records

NOTE: If you delete a grant or a person, all charges related to that grant or person will be automatically deleted, as well.

- Edit existing records
- Go to another person or account record ([CTRL+L]).
- Exit and save your changes -- click OK or press [ESC] and [ENTER]. When you press [ESC], the program will check if you made any changes on the current screen. If you did not make any changes, the screen will close and the program will take you to the previous screen. If you did make changes, the program will ask you to save changes (*Yes*), go on without saving changes (*No*) or to stay on the current screen (*Cancel*).

I.3.10 WORKING WITH LISTS

The program uses "incremental search lists" extensively. For example, if you click Accounts menu and select *Edit Grant Data*, you will see a list of grants currently in the system. This list is sorted by account number, and you could either scroll up or down the list to find the grant you are looking for, or simply start typing the grant number you are looking for. As you type, the list will find matches to whatever you are typing and select the closest match for you. For example, if you type "1", the list will find the first grant number that starts with "1" and highlight it. If you then type "2", the list will find the first grant number that starts with "12" and highlight it, and so on. At any given point, you can stop typing and simply scroll up or down from the currently highlighted selection to find the record you are looking for. You can select a record by double clicking anywhere on the desired row, or scroll to it and press [ENTER].

NOTE: On Macintoshes, the search list "resets" itself if there is no keyboard activity within a half second. For example, if you type "BB", then pause for a second, then type "A", the list will first locate and highlight the first entry starting with "BB", and then locate and highlight the first entry that starts with "A". If you did not pause while typing, the list would locate the first entry that starts with "BBA". This is a standard "behavior" of the Macintosh operating system, and we could not get around it.

The list attempts to find the record you used most recently and automatically position itself on it. For example, if you edited a person's record and then went to the Person Screen, the person selection list would highlight the person you just edited.

To exit the Personnel Manager program, press [ESC] on the main screen and then press [ENTER], or select *Quit* from the file menu, or click on the "on/off" switch on the main screen.

I.3.11 SYSTEM MAINTENANCE

From time to time (maybe once a week) we recommend that you reindex files from the System Menu's *Reindex Files* option. This will assure optimized and smooth performance, and continued accuracy of your data.

I.3.12 BACKUP AND RESTORE (WINDOWS ONLY)

You can back up all of your Personnel Manager data onto floppies or other media from the System Menu's *Backup* option. You can restore from previous backup by selecting System Menu, *Restore* option. The backup utility uses data compression techniques which can squeeze large databases into just a few diskettes.

We highly recommend that you back up your data every day, ideally using a different set of diskettes for each week day.

I.4. CONCLUSION

You have now gone through the short tutorial. You learned how to create a new person and grant records; how to set up salaries and fringe benefits (and changes to them) for people; how to charge all or part of a person's salary to one or more grants; how to run reports and post your data over to Grant Manager; and how to maintain your program.

This is the conclusion of the Personnel Manager 4.0/Demo tutorial. For the full version of the program, the following technical reference chapters will cover each segment and function of the program in greater detail.

Thank you for considering our software as your grant and personnel management solution. If you have any questions about installing, running or optimizing the program, or the interface between Grant and Personnel Manager, please call us at 415-453-0481, or send e-mail to nlights@microweb.com. You can also send us a fax at 415-453-4987. You can find our web page on the Internet at www.microweb.com/nlights.