PineSoft

Professional Training Database

Access 2007 Edition

Instruction Manual

Version 12

Copyright

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Structure

As a Microsoft Windows application which uses the Microsoft Access database users of any Windows application should have little difficulty in getting to grips with this PineSoft Application. This manual is divided into three main sections :

- **Getting Started** {pages 6 - 19} describes how to install the software and how to use the keyboard, mouse, application menus & toolbars etc.
- **Main Menu Options** {pages 20 - 46} describes the main modules of the application - see page 20 for a summary of the available options with important features and necessary procedures highlighted.
- **Miscellaneous Options** {pages 47 - 50}

Full Version {Single User or Network}
The full version is set up for use within a particular Department/Placement Unit of an Institution. Your university and department/school name appear as headers in reports to give a professional and customised quality of output. Users have full control over the number and titles of courses to be used. You may also create your own Customised Letters/Reports to give total flexibility. You will have to enter your own company and student records, so it is well worth using the demonstration version, which has been set up with dummy records, to get a quick idea of the operation of the software. The Network Version launched in 1996 gives authorised users full concurrent access to the application.

Demonstration Version

The demonstration version has the same structure as the full version and includes following dummy database files :

- Company records.
- Student records for the B.Sc. in Applicable Mathematics and Post-graduate Diploma in Information Technology courses.
- Job, application, placement, letter and memo samples.

You may add to or modify any of the above records, however, report output will include headings for the University of Abertay Dundee, School of Computing & Advanced Technologies.

The PineSoft Attachment Manager and Password Protection options have been disabled and the demonstration version is set to time out after a given period – please contact PineSoft to obtain a Current Version, if necessary.

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1 : Introduction

The PineSoft Professional Training Database is designed to meet the needs of course administrators who need to maintain details of external company contacts and keep track of the progress of students on their courses.

The PineSoft database launched in the spring of 1989 has an extensive user base in Universities and other Institutions throughout the UK. Since 1995 the application has used the Microsoft Access database engine. The XP Edition was launched in 2004 and version 12 based on Access 2007 released in 2008.

The preferred distribution medium is on a CD.

The Network Version of the application available since 1996 enables any authorised users to have concurrent access to the application. A single shared data file is loaded on a network drive, while PineSoft application files are installed on local PC's. This configuration helps to minimise network traffic and improve performance. Full details are included in the Network Version README file and the on-line help file.

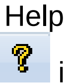
For realistic performance the recommended requirements are :

- a PC with a minimum of 512MB RAM.
- Microsoft Windows 98, NT, 2000, XP or VISTA
- a 1024 x 768 or higher screen resolution is required for the application. Use a 16 bit (64,000) minimum colour depth for smooth grey shaded displays of Main Database forms. Photographs in the demo were taken using a digital camera and then reduced in size and saved as bitmaps, using Microsoft Paint – images are around 80 - 90KB and via the Attachment fields introduced in Access 2007 are stored outside the database – this is a major improvement, preventing database bloat! It is not difficult to achieve photographic quality images - check the on-line help.
- any printer supported by Windows. **{**Avery L16 laser labels - 4" x 1&1/3" for label printing.}

1.1 Year 2000 Compliance

The PineSoft application is year 2000 compliant. The PineSoft Pop-Up Calendar, provided for all date fields, ensures that date fields are entered in the correct century. To avoid any confusion as to whether 98 refers to 1998, 2098 etc I would strongly recommend that via the Windows Control Panel - Regional Settings you use the short date format dd/MM/yyyy (if the choice isn't in the drop down list, simply add the extra "yy"). This will ensure that all dates are always shown with 4-digit years, as in the actual screen shots and sample output in this User Manual.

1.2 Ease of Use / Help Files

Users who are familiar with other windows applications should be quickly into their stride with the PineSoft software. Full support for printers is taken care of by windows and a mouse offers the best way of navigating the application, though keyboard support is also provided. Help is provided by the usual Windows Help files. Press the [F1] key to display PineSoft Context Sensitive Help or click on the help button  in Toolbars - see section 4.3

1.3 Backup

You should ALWAYS maintain regular backups of your valuable data stored in the single file Pinedat.accdb in your PineSoft installation directory, which contains all your data. The data file is located in your chosen installation directory for the Single-User version, or your Network Share for the Network version. **If the data file is lost or becomes corrupted you would have to re-enter all your data! A nightmare scenario!**

2 : Installation

2.1 Installing Software on a Hard Disk

To install the software on a hard disk you require 120MB of free disk space and a PC with a minimum of 512MB RAM.

The application is designed to use your copy of Microsoft Access 2007.

2.2 Demonstration Version

For the demonstration version the Access Runtime files and all PineSoft program & data files are copied, by default, to C:\Program Files\PinesoftDemo.

Use the Custom Setup Install Option to choose a different location, if required.

2.3 Full Version {Single User or Network}

For the full version {single user} all files are copied to C:\Program Files\Pinesoft.

Use the Custom Setup Install Option to choose a different location, if required.

NOTE : Please see the Installation Guide supplied with the Network Version for details of how to install the application on a shared network drive.

2.4 Using the Installation Batch File

All PineSoft application files, User Manuals etc. are supplied on a CD.

Insert the CD to automatically launch the setup programme, or display the files in the root directory of the CD using My Computer or Windows Explorer and double-click on the setup.exe file to launch the PineSoft installation program.

2.5 Optimising the Application

The speed of the application depends on the speed of operation of the Microsoft Access database. Users using modern processors with a minimum of 512MB of RAM should find that the application runs swiftly. Increasing the amount of RAM and moving to a faster processor are the best ways of improving performance.

2.6 Printer Set-up

The application will print to the default printer as defined by your Windows set-up. You may change printer or printer options from within the PineSoft application and save printer defaults, orientation, margins etc. in PineSoft reports.

Use A4 paper in your laser printer, headed paper being used for standard letters and student references. **You must use Avery L16 laser labels - 4” x 1&1/3” for label printing** {2 columns of 8 labels per A4 sheet - no space between labels - ½” top & bottom margins}.

Note : The majority of PineSoft reports and letters are designed for A4 paper with Portrait orientation, while envelope settings are for DL envelopes with Landscape orientation.

While it is easy to use the Windows Printer Setup Options {see Section 4.3.3} to change the printer used for output the paper and orientation settings for the selected printer may replace the PineSoft defaults. This is particularly important in the case of envelope printing where you should ensure that you define Landscape orientation and DL paper for correct output. It is recommended that you Preview reports on screen to ensure valid output before printing. Any changed settings may be saved on exit from any report/mail output option as new defaults for that report.

3 : Loading and Running the Application

If you are familiar with any Windows software package you should have no difficulty in using the PineSoft application immediately.

To load the application click on the PineSoft Windows option, shown below.

on the Start Menu or


on the Desktop (if present)

The PineSoft Main Menu shown on the next page is then displayed, preceded by an information screen in the demonstration version and a license/maintenance reminder message if within 60 days of the renewal date in the Full Version.

As you can see the Main Menu gives you easy access to the various PineSoft options. For convenience there are three groups.

The first "Examine/Edit Data" group gives direct access to the main PineSoft database tables.

The second group "Report/Mail Output" has over 100 different report & mail output options so that your data may be easily extracted and presented in paper form.

The final group contains the "Setup" and "Exit" buttons. The "Setup" button gives access to the extensive Setup options for customising prompts and lookup tables to suit individual requirements. The "Exit" button is used to close the PineSoft application.

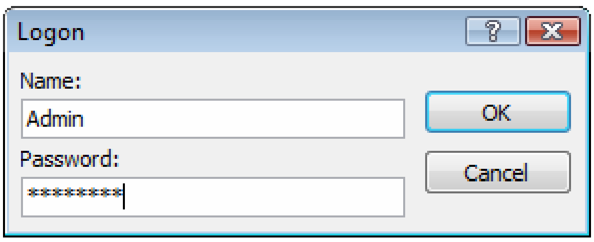
To select an option click on it with your mouse, tab to the required button and press [Enter], or type the underlined letter in the required button option.

3.1 Password Protection Option

The PineSoft application is not password protected by default. See Section 9.3 for details of how to assign or change a password.

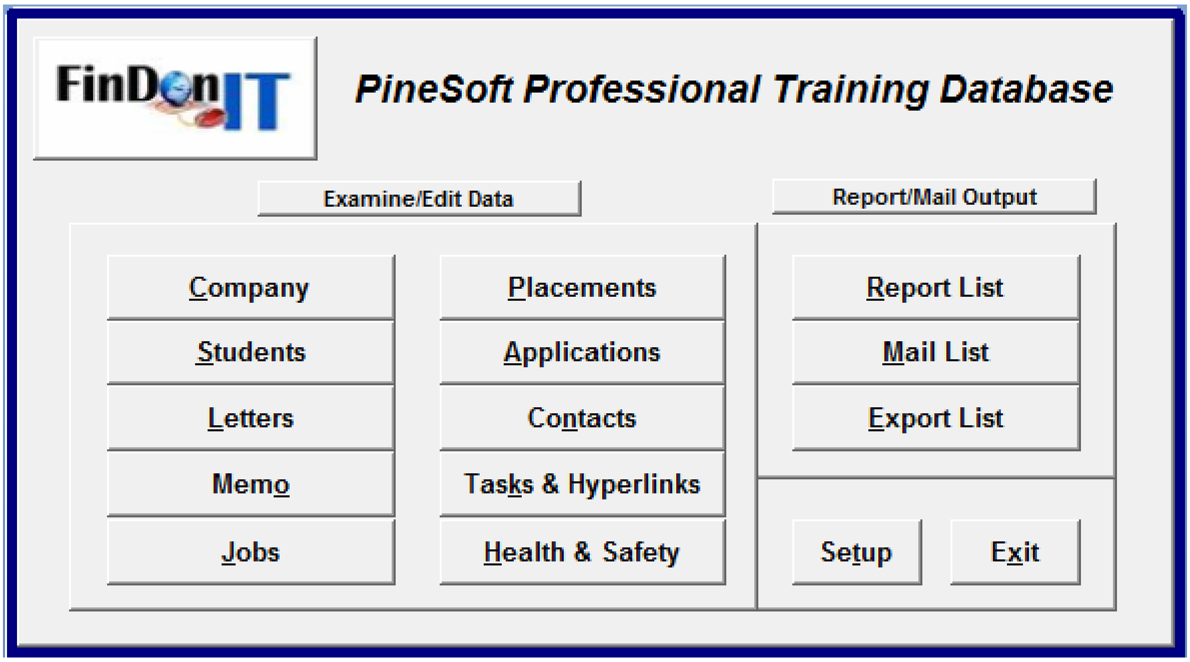
If a password is assigned then a logon screen, as shown below, is activated

NOTE : Any assigned password will apply to ALL Access 2007 database files, not just PineSoft.



The User name will always be Admin, and the password is user definable.

It is crucial that you remember the Logon name and password, or you won't be able to open the application!



4 : Overview of Toolbar & Keyboard Options

Before discussing the various options available from the PineSoft Main Menu in detail we will first look at the commands available in the customised toolbars which form a central part of the application.

4.1 Using the Mouse and Keyboard

The use of a mouse is highly recommended as it makes interacting with menus, dialog boxes and selecting fields when editing records fast and simple.

When the manual directs you to click, position the pointer on the object you're to click and quickly press and release the left mouse button.

When the manual directs you to double-click, position the pointer on the object you're to double-click and in quick succession press and release the left mouse button twice.

When the manual directs you to drag the mouse, position the pointer on the object, press the left mouse button and hold it down - then move the pointer by dragging the mouse to highlight a region - then release the mouse button.

If you don't have a mouse, you may interact with the application solely with the keyboard.

4.2 Help

To obtain PineSoft context sensitive help, press the [F1] key or click on the help button displayed on the extreme right of all toolbars.

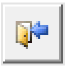
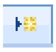
If you are not familiar with the use of a Windows help file you will find extensive on-line help available in "How to Use Help" in the Help Menu, once the help file is activated.

4.3 *Interacting with Toolbars*

The application uses customised toolbars which duplicate the actions in the pull-down menus. In Access 2007 click the Add-Ins tab to display the above toolbar – by default the Ribbon is minimised and you may activate it when required.

The "Edit toolbar" shown above has the most buttons and is available when using an Examine/Edit option and using a mouse provides one click selection of common edit features. Text describing each toolbar button is displayed when you place your mouse pointer over it. Some buttons are displayed together in natural groupings and you will soon remember their functions which are summarised below and explained in more detail on the next few pages.

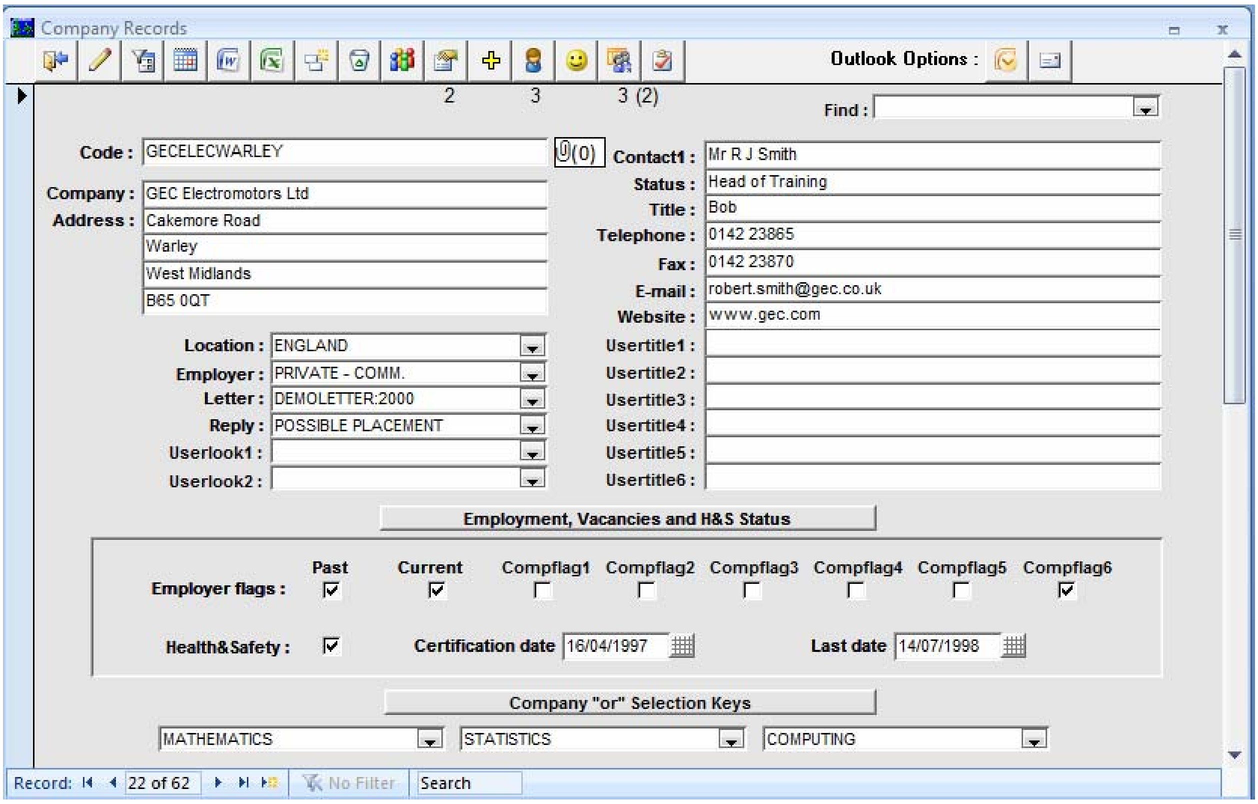
NOTE : Many toolbar options may be accessed more quickly by right clicking your mouse!

	Close the current window & return to the previous one
	View data via form {1 record per page} or datasheet {26+ per page}
	Print, Preview & Printer Setup
	Check spelling in selected text
	Cut, Copy, Paste
	Find, Find Next, Replace
	Sort on current field, ascending or descending
	Filter options
	Move to the end of the records to Insert a New one
	Undo changes to current field/record, Undo last command
	Output & view current records in Excel – Excel is launched automatically
	Display the PineSoft Windows Help file

4.3.1 *Note for Keyboard Users*

Many toolbar options are also available via the menu bar as shown above, which is displayed in the Ribbon on the Add-Ins tab. To activate the menu via the keyboard first press the [ALT] key. For full details see Section 4.5 "Summary of Keyboard Techniques"

4.3.2 Illustration of Form & Datasheet Views



Fi	Code	Company	Address	Town	County	Postcode
	ANGUSDISTRICTCOUNC	Angus District Council	District Buildings	Forfar	Angus	DD4 3SA
	AT&TDUNDEE	AT&T (Manufacturing) Ltd	Kingsway West	Dundee		
	BETTBROTHERS	Bett Brothers Plc	P.O. Box No 1	9 Cox Street	Dundee	DD1 9AB
	BONARLONG	Bonar Long Ltd	East Kingsway Works	Dundee		
	BRITISHGEOL	British Geological Survey	Murchison House	West Mains Road	Edinburgh	EH9 3LA
	BUILDFIRERESEARCH	Building Research Establishment	Fire Research Station	Borehamwood	Hertfordshire	WD6 2BL
	BUILDRESWATFORD	Building Research Establishment	Station Road	Watford		
	CAPEINDPRODUCTS	Cape Industrial Products	Germiston Works	Petershill Road	Glasgow	G21 4AV
	CENTRALREGCOUNCIL	Central Regional Council	Viewforth	Stirling	FK8 2ET	
	CJLANG	C J Lang & Sons Ltd	332 Clepington Road	Dundee	DD3 8SJ	
	CONOCOABERDEEN	Conoco UK Ltd	North Anderson Drive	Aberdeen	AB2 4AZ	
	DHSSNORTHFYLDE	DHSS	North Fylde Central Office	Computer Branch	Farley	FG3 4TY
	DHSSSTATSLONDON	DHSS	Statistics & Research Divis	Hannibal House	Elephant & Castle	London SE1 6T
	DON&LOW	Don & Low	St. James Road	Forfar		
	DUNCOFJORDANSON	Duncan of Jordanson	College of Art	Perth Road	Dundee	
	DUNCOFJORDANSONNEW	Duncan of Jordanson	College of Art	Perth Road	Dundee	
	FERRANTIDUNDEE	Ferranti Ltd	Dunsinane Avenue	Dundee	DD2 3PN	
	FIFEREGIONALCOUNCIL	Fife Regional Council	Regional Headquarters	Fife House	Glenrothes	KY7 5LT
	FORESTRYROSLIN	Forestry Commission	Northern Research Statior	Roslin	Midlothian	
	FRESHWATERBIOL	Freshwater Biological Assoc.	Windermere Laboratory	The Ferry House	Ambleside	LA22 0LP
	FSASSURANCEGLASGOW	FS Assurance Ltd	190 West George Street	Glasgow	G2 2PA	
	GECELECWARLEY	GEC Electromotors Ltd	Cakemore Road	Warley	West Midlands	B65 0QT
	GLENINSURANCEGLASGOV	Glen Miller	(Insurance Brockers) Ltd	203 Fenwick Roac	Giffnock Road	Glasgow
	GRANTTHORNTON	Grant Thornton	Chartered Accountants	112 West George !	Glasgow	G2 1QF
	GREATGHEALTH	Greater Glasgow Health Board	225 Bath Street	Glasgow	G2 4JT	
	HIGHGROVE	Highgrove Ltd	Dunsinane Avenue	Dundee		
	HIGHREGINALCOUNCIL	Highland Regional Council	Dept. of Roads & Transpo	Regional Buildings	Inverness	IV3 5NX
	HOMEOFFICE	Home Office	Queen Anne's Gate	London	SW1H 9AT	
	HOMEOFFICESAB	Home Office	Scientific Advisory Branch	Horseferry House	Dean Ryle Street	London
	IMIYORKSHIRE	IMI Yorkshire Imperial Ltd	Fyfe Works	Carolina Port	Dundee	DD1 3LR
	KENTAREAHEALTH	Kent Area Health Authority	Preston Hall	Maidstone	Kent	ME20 7NR

4.3.3 Print, Preview & Printer Setup

In addition to the comprehensive Report & Mail Output options within the PineSoft application, it is also possible to preview or print records in form or datasheet views. The three buttons, from the left are Print, Preview & Printer Setup.

You may use the Preview button first to display the results on screen from which you can either cancel or print the display. In preview mode if you position your mouse pointer over the page it turns into a magnifying glass - clicking your mouse you may toggle between Zoom-in and Zoom-out.

The Print button will print the selected records directly to the Windows default printer.

The Printer Setup button opens a familiar Windows Setup Printer Dialog, where you may change the default printer, orientation - portrait or landscape, set margins etc.

NOTES :

(1) If you have filtered your data to obtain a subset of records then the print ALL option will apply to the current subset.

(2) The above features are useful for printing a list of look-up fields defined in the Main Menu Setup options. For example, Examine/Edit location codes, switch to datasheet view and select the Print button to get a hard copy of your location codes.

4.3.4 Cut, Copy and Paste

The three buttons for Cut, Copy and Paste are standard across all Windows applications and enable you to easily move text within the application or to any other Windows application via the Windows Clipboard. See your Microsoft Windows documentation for full details. As usual, before you can cut or copy text or records you must mark them. Select text in a field by clicking where you want to start selecting and drag across the data. Alternatively hold down the [Shift] key and use cursors.

To select a record, click the “record selector” to the left of the record. To de-select click on any field in the record. The record GECELECWARLEY is selected in the illustration of Form & Database views on the previous page. {In datasheet view you may drag to select multiple records.}

NOTES :

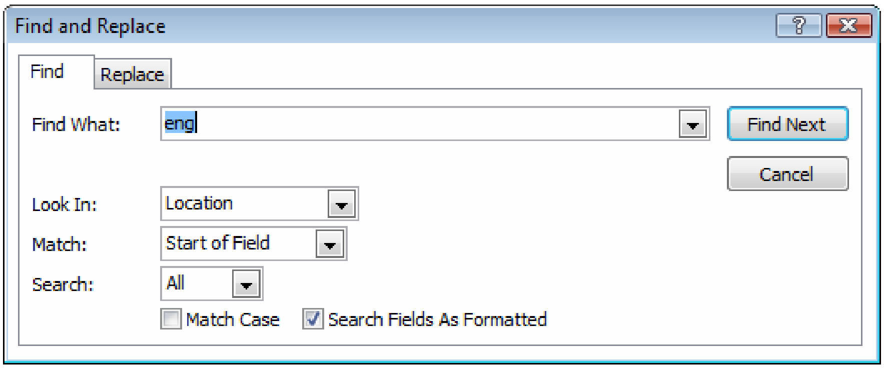
Once text or a record(s) is selected you may use the Cut button to remove it or the Copy button to copy it to the Clipboard. {Pressing the [del] key you may delete the text/record}. Any text in the Clipboard may be pasted at the flashing text insertion point by using the Paste button.

To copy records it is preferable to use the PineSoft Copy button, described in section 4.4 which automates the task.

4.3.5 Finding Data

The Find Dialog box shown below gives considerable flexibility when searching a database to locate specific records. The default search is applied to the current field which is faster than searching all fields.

To open the Find Dialog box, click on the left binocular button or press [F7] to display :



With the cursor in the location field the above settings may be used to find the first record with location field starting "eng" {such as ENGLAND} by clicking on the Find First button. To find subsequent matching records click on the Find Next button.

Note : after closing the Find Dialog box you can always find the next occurrence of the value most recently selected by clicking on the Find Next Toolbar button {the one in the middle} or by pressing [Shift][F4].

The above settings search for "eng" at the Start of Field. You may also search in Any Part of Field or Match Whole Field. Additionally you may use wildcard characters in the Find What box, using ? for a single character, * for any number of characters and # for a single number. You may use characters in square brackets to find one of several characters, for example [DMP] to find D or M or P, [C-G] to find any letter between C and G. You may specify characters you don't want to find by including an exclamation mark after the first bracket, for example [!AFG] to find any character except A, F or G. Examples :

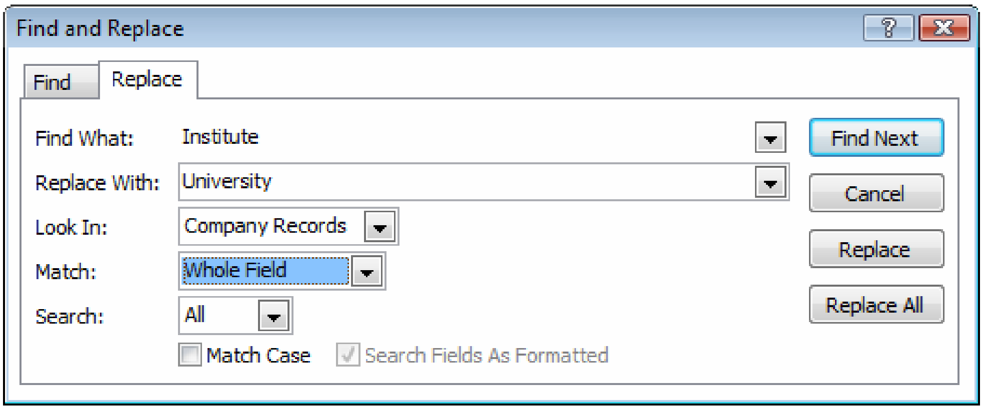
Search String	**Text Found**
Sm?th	Smith, Smyth etc.
L*ng	Lang, Lingering etc.
#th	5^{th}, 8^{th} etc.
*th	128^{th}, 4^{th} etc.
Paul[ao]	Paula, Paulo etc.
Paul[!ao]	Pauli {but not Paula or Paulo}

Note : to find one of the wildcard characters enclose it in square brackets. For example, use [#]1 to find the value #1.

4.3.6 Replacing Data

The Replace Dialog box shown below is similar to the Find Dialog box and enables you to find occurrences of specific text and replace it with different text.

To open the Replace Dialog box, click on the third binocular button or press [Shift][F7] to display :



With the above settings you may click on Find Next to find the first occurrence of “Institute” in any field - to change the text from “Institute” to “University” click on Replace or to leave the selected text as it is and find the next occurrence instead, choose the Find Next button again. {Choose Replace All to replace ALL occurrences without prompting}. When you have finished, choose the Close button to close the dialog box.

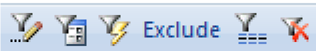
Note : if the dialog box obscures the text you can move it out of the way by holding your left mouse button down on the blue title bar and dragging the dialog box. Using a keyboard press [Alt][Spacebar] to display the Control Menu for the dialog box and use the Move option. As with the Find Dialog box you may use wildcard characters in the Find What text box.

4.3.7 Sorting Records

You may sort records in a table or form in a different order than they are usually displayed. For example, the default sort order for Company Records is Ascending {A - Z} based on the unique company Code field. To sort records ordered by location, position the cursor in the location field, then click on one of the two Quick Sort buttons to display in ascending or descending order.

Note : in datasheet form you may sort by more than one adjacent field. To do this mark the required columns by drag & clicking on the field names - then use the Quick Sort buttons.

For more flexibility, when sorting on more than one field, where you may require some fields sorted in ascending order and others in descending order see the next section on Filtering Records.



4.3.8 Filtering Records

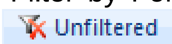
From the left the Filter buttons are “Advanced Filter/Sort”, “Filter by Form”, “Filter by Selection”, “Filter Excluding Selection”, “Apply Filter/Sort”, “Remove Filter/Sort - Show All Records” and “PineSoft Filter by Form” .

The Filter options give you unlimited flexibility to display subsets of records and/or sort records using criteria defined over several fields.

Use a filter when you want to :

- temporarily filter out records that don’t apply to your current task - for example, to display records from one of five different courses.
- find records that meet complex criteria, defined over more than one field.
- display records of students still requiring a current placement.
- sort records based on the contents of several fields when you want some fields sorted in ascending order and others in descending order. The sort is applied from left to right in columns.

Most users will use the “PineSoft Filter by Form” button  and the “Cancel Filter” button  (toggle between 

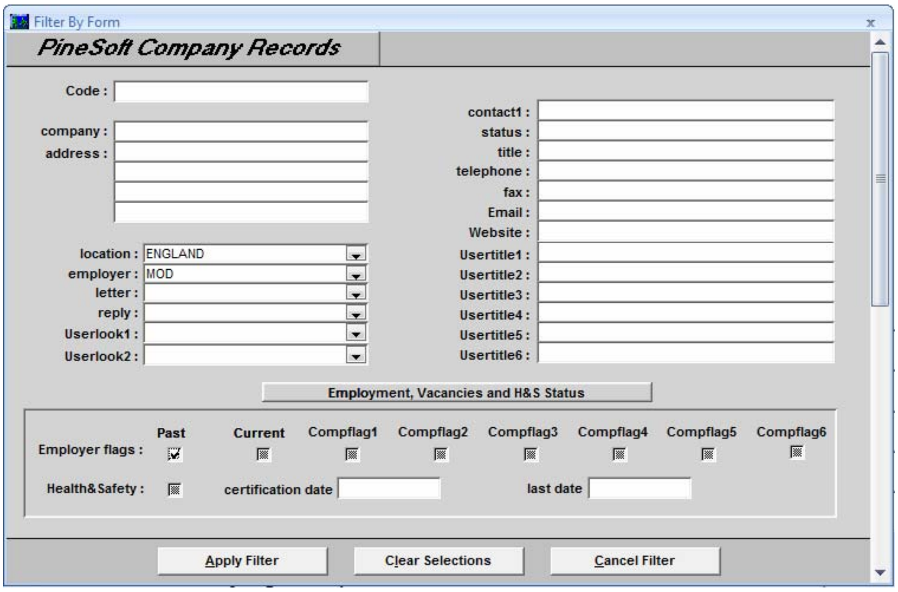
and 

- bottom left of screen) to easily filter required records, or restore All records as required.

Not all filter options are available if you use a runtime copy of Access, however, this is no great loss with the easy to use PineSoft Filter by form option available. See Example 1 below for an illustration of it’s use.

Example 1 { Using the PineSoft Filter by Form Window}

Click on the PineSoft “Filter by Form” button  in the header of the Company Examine/Edit form to display the corresponding Filter by Form window shown below. With the shown selections clicking on the “Apply Filter” button would select MOD companies in England which have employed students in the past. Use the “Clear Selections” button to clear all current selections. For text fields entering don would match Donald, Donaldson etc. as a "*" wildcard character is automatically appended to entered text. To match Stuart Donald you could enter "*don", where "*" stands for any number of characters.



As a further illustration suppose that you have created letters over a number of years using the Examine/Edit Letters option. To filter just the 2000 letters click on the "Filter by Form" button and enter *2000 in the letter date field. Click on the "Apply Filter" button to select year 2000 letters with dates such as 17 April 2000, etc. As you can see the "Filter by Form" option, introduced in PineSoft 2000, is very easy to use and represents a significant step forward. Users who require even greater flexibility may use the "Advanced Edit Filter/Sort" window as described in Example 2 below.

NOTE : You can always view any filter created using the "PineSoft Filter by Form" option in the "Advanced Edit Filter/Sort" window. Most users will probably find little need to delve into the more advanced search criteria described in Example 2 below.

Example 2 {Using Advanced Edit Filter/Sort Window}

The Advanced Edit Filter/Sort option is only available if the application is run via a full copy of Access 2002.

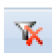
The Edit Filter/Sort screen on the next page illustrates how to define a filter to select company records in either ENGLAND or WALES. The company records in England are further restricted to those which are classed as PRIVATE employers.

Open the "Filter Window", shown on the next page, by clicking the Edit Filter/Sort button.

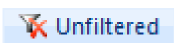
Click on the Field list & display the location field, or drag the field name location from the displayed list.

Select ascending from the Sort text box.

In the Criteria boxes, enter each "or" option on a separate row {alternatively, enter criteria on the same row separated by or}. You could enter the complete name, i.e. ENGLAND, then WALES, however, it is simpler & more flexible to enter en* to display **Like "en*"** Access automatically places the quotes and inserts Like when you move from the text box. Similarly define the required option for the employer field. Click on the Apply Filter/Sort button at the top of the screen to apply the filter.

To restore All records, if required, click on the "Remove Filter/Sort" button .

(toggle between 

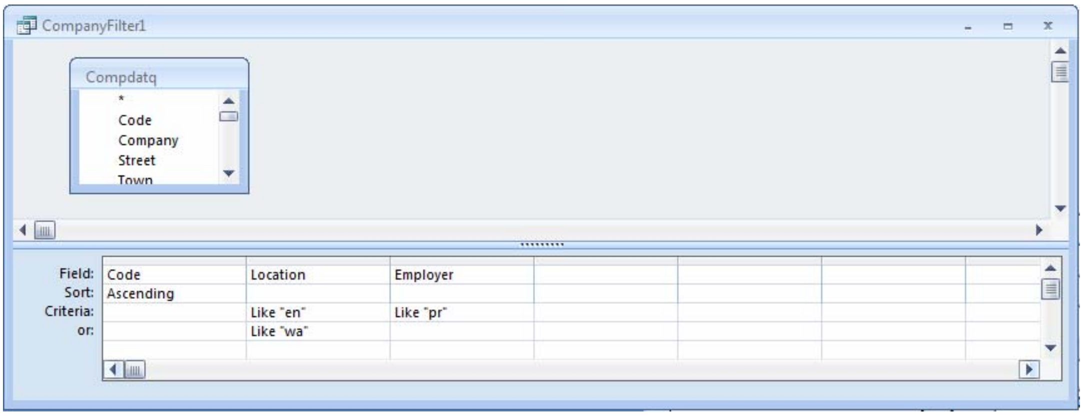
and 

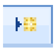
- bottom left of screen)

Specifying Criteria

You may use operates and wildcard characters in criteria expressions as illustrated below.

<u>**Criteria Expression**</u>	<u>**Records included in Filter**</u>
“BETT”	value is “BETT”
like “B*”	any value starting with a b or B
<”D”	value begins with letters A - C
not “ENGLAND”	values other than “ENGLAND”
Null	no value stored in field
2	numeric value is 2





4.3.9 Adding a New Record

Clicking on the Add Record button shown above moves you to the end of the records and displays an empty record where you may enter new records.

NOTES :

(1) New records are added at the end of database tables - they are automatically sorted into the default database sort order when you close the database - so the next time you open the database the records will have been sorted.

(2) To ensure the integrity of your data you will not be able to save a record unless any key fields have unique values and in the case of the Student Database if any of the “required” fields have not been entered. Press the [Esc] key to abort an operation or use the Undo button options described below.

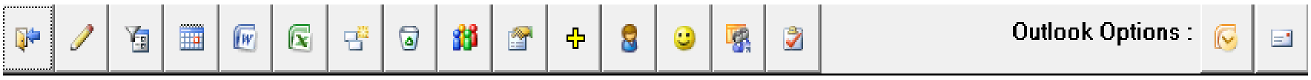
4.3.10 Excel

Output & view current records in Excel - Excel is launched automatically.

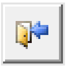
4.3.11 Undo buttons

The first Undo button is used to undo changes to the current field/record. Equivalent to pressing the [Esc] key. The second Undo button undoes the last command.

4.4 Interacting with PineSoft Buttons in Form Headers



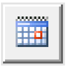
The PineSoft buttons shown above are displayed, where appropriate, in form headers when Examining or Editing database records. To select a button option with a mouse simply click on it. To use the keyboard press the [F6] key to toggle to the header buttons - TAB to the button required then press [Enter]. When highlighted a description of the option is displayed in the status bar at the bottom of the screen. To display the description with a mouse hold down the right mouse button. A description of the available buttons is given below.



Close Form

Enable Edit / Read-Only Mode. You may use the Setup - “Display Default” options to set the Main Database forms to Edit Mode, or Read-Only mode initially.
You may toggle between the two modes by pressing the displayed button. Setup database tables are always set initially to Read-Only, so you will always need to click the Enable Edit mode button to make changes.

Filter by Form option. The easiest way to filter records.



Pop-up Calendar. You may minimise the calendar, if required, and keep it available at all times during a PineSoft session.

Export the present set of records to a file in Microsoft Word Mail Merge format. {Text .txt format used}

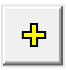
Export the present set of records to a Microsoft Excel file.

Copy the current main database record. {After copying a "*" character is appended to the copied key code to make it unique, otherwise it can't be saved.}

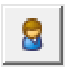
Delete the current main database record & related records. Requires confirmation for safety.

Display pop-up form of additional company contacts for the current company record.

Display pop-up form listing Student Applications for the current record.



Display pop-up form to Add New Placement Record(s).



Display pop-up form listing Student Placement Details for the current record.

Display student pop-up form, available while browsing the Main Company Form.

Display pop-up Jobs Form, available when browsing Company records. Use to enter new jobs.

Display pop-up Tasks Form, available in Company, Student, Placement and Jobs forms. All include a hyperlink option to link to external files. Use to keep track of User-defined tasks for company, student or placement records. Monitor company consultancies, the return of student reports, projects etc.

This option requires that Microsoft Outlook is installed. Outlook users may create appointments and send E-mail.

NOTE : The Export buttons included in Form Headers are designed to give users as much flexibility as possible, however, it is unlikely that they will be required in day to day use. If you want to export data to create Customised Letters or Reports it is best to use the powerful Export Options included in the Main Menu Export List - see Section 8.2.8 of the User Manual for further details.

4.5 Summary of Keyboard Techniques

4.5.1 Keyboard : Navigation Techniques

[TAB]	Move to the next field
[Shift][TAB]	Move to the previous field
[Ctrl][PgDn]	Move to the next record
[Ctrl][PgUp]	Move to the previous record
[Ctrl][Home]	Move to the first record
[Ctrl][End]	Move to the last record
[PgUp]	Scroll up one page
[PgDn]	Scroll down one page
[F6]	Toggle between main form & header region
[Alt][Shift][F6]	Move between pop-up windows and main form
[Alt]	Activate the menu bar

4.5.2 Keyboard : Editing Techniques

[F2]	Toggle selection of current field. When selected {highlighted} new text replaces old. Insertion occurs at blinking insertion point.
Arrow Keys	Move insertion point within a field
[Esc]	Undo changes to the current field or record
[F4] or [Alt][🡇]	Open find list / option list to display choices
[Shift][F2]	View & edit the current field in the Zoom(enlarged)
dialog box	
[Alt][Spacebar]	Display the control menu {use to close pop-up windows}

Useful Commands for Network Version

[Shift][Enter]	Save the current record
[F9]	Refresh data in currently active window
[Shift][F9]	Requery records to show any new records

4.5.3 Keyboard : Search Techniques

[F7]	Display the find dialog box

[Shift][F4]	To find the next occurrence of the value defined in the find dialog
[Shift][F7]	Display the replace dialog box

4.5.4 Print Preview Keys

[P]	Display the Print dialog box
[S]	Display the Printer Setup dialog box
[Z]	Toggle Zoom in/out for a magnified view of a page
[Esc]	Cancel Print Preview / Print dialog / Printer Setup dialog Cursors to move around page
[F5]	Move to Page Number box - type in required page & press [Enter]

4.6 Drop-down Lists

The Find drop-down lists used to locate specific records and access look-up tables, as illustrated below,

may be used with mouse or keyboard.

- With a mouse click on the arrow on the right of the list box to display the drop-down list. Double-click an entry to select it.
- With the keyboard, press [F4] to open the drop-down list then ↓, ↑, [PgDn] etc. to highlight your choice, then press [Enter] to select it.
- Using incremental type-in. Press the first letter of your choice. If more than one item in the list starts with that letter, you are taken to the first one. Press the second letter of your choice to narrow the selection, followed by subsequent letters if necessary. This feature is particularly useful with very large pick lists. Once your chosen item is highlighted press [Enter] to select it. To back out of incremental type-in one step at a time successively press [BackSpace] to delete characters.
- Note : when selecting records at random using the “Select Lists” used in Report/Mail output incremental type-in is confined to the first character only {see section 8}.

NOTE :
The Find drop-down list has one limitation. It can’t cope with Irish surnames, such as O’Conner due to the apostrophe. The solution is to omit the apostrophe in the code and use OCONNER – the actual student name can still be entered correctly as O’Conner.

Summary of Main Menu Groups

The Main Options within the PineSoft application have been divided into three groups as shown in the screen display in section 3 of this manual. Important tasks are discussed in Sections 5 – 8.

New Session Options : Section 5

At the start of a new session you need to carry out a number of essential tasks before starting to enter student or placement details for the new session. See the Setup Submenu - New Session Options.

Setup Submenu Options : Section 6

The Setup Submenu options which are used to modify {as required} the default database "look-up" tables for company & student codes, staff names and user definable prompts. Only values defined via the setup options may be entered into the corresponding fields of the main database tables. It is recommended that a single "Placement Manager" is responsible for changing or adding new course titles.

At the start of a new session you should use the "New Session options" to update student and company fields, before entering details of new student cohorts. See Section 5 for details.

Examine/Edit Data : Section 7

Use the Examine/Edit Company option to insert new company records or to update or correct details in existing records. Records are kept in alphabetical order via the company code field and you should use informative codes such as GECELECWARLEY, not short cryptic ones.

Use the Examine/Edit Student options to insert new student records or to update or correct details in existing records. Records are kept in alphabetical order via the student code field and you should use informative codes such as DONALD_LOUISE, not short cryptic ones. For the correct operation of Mail & Report options it is essential that you complete the entries for the surname,fname, mailname, title, year, placement number, session and course fields. You have to supply entries for these fields or it will not be possible to save the record so it is not possible to have invalid data.

Use the Examine/Edit Letters option to create an unlimited number of letters Use the Examine/Edit Memo option to create an unlimited number of memos.

The Jobs option is used to enter or amend details of Job Vacancies

The Placements option is used to browse historical placement records and to Edit or Amend placement records.

The Applications, Contacts and Tasks & Hyperlinks options give direct access to the relevant database tables, if required, though you will normally access these tables via the Pop-up forms in the Main Company or Students database forms. The Pop-up forms automatically display the relevant details for the selected company or student.

The Health & Safety option lists all relevant Health & Safety requirements for placed students.

Report/Mail Output : Section 8

Use these options to select from over 80 report & mail options which organise and present your data in a wide range of useful formats. See the appendices for some sample output.

5 Setup Submenu : New Session Options

At the start of a new session you need to carry out the following essential tasks before starting to enter student or placement details for the new session. See the Setup - New Session Options.

(1) Make a historical backup of the file Pinedat.accdb in your PineSoft data directory.
Keep this in a safe place.

(2) Use the "Setup Increase option" to automatically increase the session by 1 and year 1, for all existing students. This updates the entries in the Main Student Database with a single key press! {Use the "Setup Decrease option" to reverse the effect of "Setup Increase", if used by mistake.}

The placement number field is not updated automatically as this will not always be required. As a consequence you must check and change if necessary the placement number for each student. {Using Student Examine/Edit Option}

If a student fails and has to have a year out you may wish to move the record temporarily out of the way. Do this by changing the year field to an unused value by adding a 0, i.e. year 2 becomes 20. If he/she rejoins the course reset to the correct year field - this ensures that the student's data is retained.

(3) You will need to clear the details relating to Current Applications and Jobs from ALL relevant records :
Use the "Setup Delete Interviews option", "Setup Delete Applications Option" and "Setup Delete Jobs Option" to delete the interview, current application details and old jobs from all records - this clears all fields with a single key press so that you are ready to start with the new session placement details. You will still retain your historical placement details within the Placements records.

(4) To contain the size of the student database you may, if required, delete the details of students who have not undertaken any placements from the student database - use the Student Examine/Edit option in datasheet view to easily delete blocks of students. Take a backup first! Note : The Referential Integrity rules built-in to the application to ensure consistent data will not allow you to delete any students with related placement records. To delete such students you would first need to delete their Placement records using the Main Menu Placements Options. {If you decide to do this it would be best to delete complete cohorts, to avoid inconsistent Placement Reports!}

(5) Use the Student Examine/Edit option to enter details of any new student cohorts, making use of the "copy" button to duplicate common fields such as course, year, placement and session. Set the "required" flag for students requiring a placement this session, and clear the flag for other students.

6 : Setup Submenu Options

6.1 Overview

The Setup Submenu displayed below may be used to modify {as required} the default database “look-up” tables for company & student codes, staff names, task/job codes and user definable prompts.

There are two main advantages in this approach :

- You are not constrained by default values and have the flexibility to customise the application to match your requirements.
- The values, which you define, form “look-up” tables and to ensure the integrity of your data only values included in these tables may be entered into the main company or student databases.

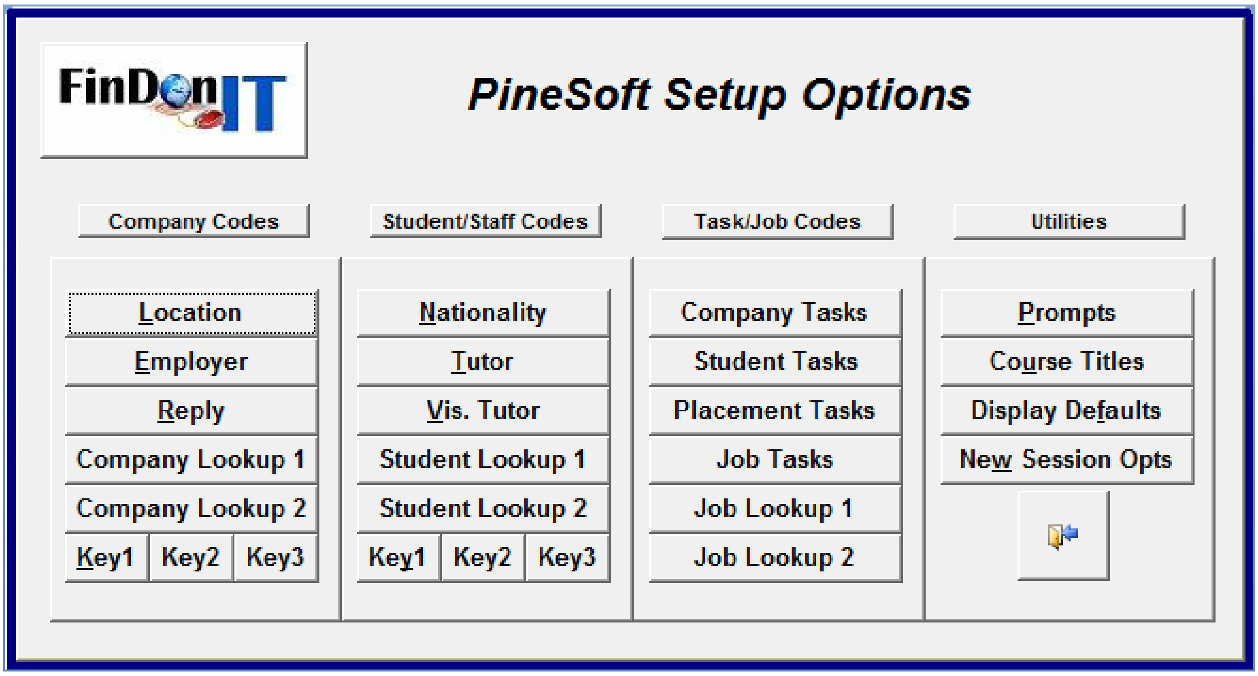
The “look-up” tables defined for geographical location, type of employer, reply codes, etc. are entered in the main databases via drop-down lists which display all defined values.

Tip : while editing any look-up table switch to datasheet view and click on the Toolbar Print button to list records on your printer, or click the Excel button to launch Excel and display the records in the spreadsheet.

Using the **Prompts option** you may define eight job, fourteen company and eleven student field names of your choice to cope with individual preferences. The User-definable toggle fields are particularly useful when filtering records. Two of the customisable prompt fields in the jobs, company and student databases also have user definable look-up tables for further flexibility.

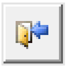
Use the **Course Titles option** to edit existing course titles or to enter new course codes and titles.

Changing “Prompts” or “Course Titles” should be the responsibility of a single Placement Manager!



Use the **Display Defaults option** to set the edit behaviour to suit your requirements. Users may set the initial default for Main Database forms to Edit or Read-Only. The display of Main Database Windows may also be set to “Centred” or “Auto-scaling”

Use the **New Session Options submenu** to “Increase”, “Decrease”, “Delete Interviews”, “Delete Applications” and “Delete Jobs”. These options are used at the start of a New Placement Session to update records before entering details of new student cohorts. See the “New Session Options” in Section 5 for details of the important steps to be performed at the start of each new session.

The Exit button  takes you back to the Main Menu. You may also use the Exit command in the File Menu to achieve the same effect.

Note : the Close option in the File Menu is equivalent to the Close button displayed in the top left of the Main Menu form and closes the active window.

7 : Examine/Edit Data

7.1 Company Examine/Edit {Main Company Database}

7.1.1 Main Company Information

Use the Company Examine/Edit option to browse through existing company records, edit existing information or enter new details. A typical company record consists of a two page scrolling display as shown in Section 7.1.19.

To maintain referential integrity it is not possible to delete a company record while placement details remain in the associated placement pop-up. It is unlikely that you will want to delete any company records - to maintain accurate records it is generally preferable to change the reply code to “DEAD RECORD” and indicate in the Further Information region the reasons.

Each company record must be given a unique code, which is used to order the records alphabetically. Use informative codes such as GECELECWARLEY, not short cryptic ones. In this Windows version you may change the code at any time as the powerful Access cascade update feature will automatically update the link to any related tables. If a new code is unique then the record will be posted (saved) when you move from the record. Otherwise you will be prompted with a message to modify the code - it is not possible to save duplicate key codes. When using the Mail option for standard letters & address labels, letters use Dear {title field} so Dear Bob would be printed when the title field is Bob. The name & address printed on standard letters lists contact1, status and address - the line-squeeze facility ensures that no gaps are left if the status field or any address fields happen to be blank.

The fields for location, employer, letter, reply and the two user definable option fields all have associated “look-up” tables which can be displayed by pressing the [F4] key.

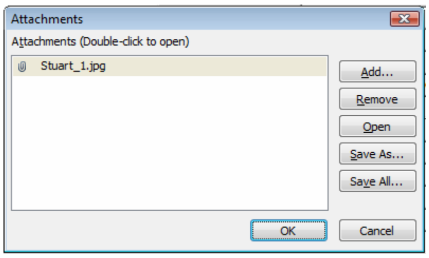
The toggle Yes/No fields for “past employer”, “current employer”, “Health&Safety” and the six User-definable toggles facilitate the easy filtering of records via the PineSoft Filter Button or Selection Criteria in Report options.

Note : the letter code field is updated automatically when you use the Mail output options to print a letter, so will give you a record of the last letter sent to the company.

7.1.2 New Access 2007 Attachment Field

The attachment field 

may contain any number of files and as these are stored outside the database do not contribute to data bloat! Double click the paper click to view or add files :



7.1.3 User Definable Fields

The eight field names initially labelled userlook1, 2 and usertitle1 - usertitle6 and the six toggle fields compflag1, ... compflag6 as shown in Section 7.1.19 of the manual may be customised to suit your own particular requirements using the Setup submenu options {see section 6.1}.

7.1.4 Key Fields

Keys may be used to select particular groups of records during the main menu Mail and Report options. You may define any number of keys via the Setup submenu options {see section 6.1}. The key fields have associated "look-up" tables so there is no need to remember them, simply press [F4] to display a complete list of defined keys.

7.1.5 Company Details for Placement Notice Reports {Memo Field}

The Company Details region is intended for specific factual information about the company - this information along with the company's address is included in the Possible Placement Report, to inform students about a possible placement.

7.1.6 Company Further Information {Memo Field}

Use this Memo field region to maintain any required details about correspondence etc. with the company.

7.1.7 Interview Details

The interview details are used in the Company - Interview report which also lists details of student interviews from the Current Applications pop-up - see below.

7.1.8 Pop-up Forms

A major feature of the application is the ability to pop-up additional information relating to the current company record via the PineSoft Buttons displayed in the Form Header. See Section 4.4 for an overview. Click on the required button to display a pop-up. You may display more than one pop-up at a time, move them, resize them and switch easily between them by clicking with your mouse. See Section 7.1.21 for illustrations.

When entering or editing pop-up records the record marker changes to the edit pencil icon - make sure that you save the new pop-up record, by closing the pop-up, or pressing [F9], or moving to another pop-up record before moving to another Main Record.

7.1.9 Company Contacts {Pop-up Form}

In addition to the main company contact you may use this pop-up form, illustrated in Section 7.1.21, to maintain details of as many other contacts as you require.

7.1.10 Current Application Details {Pop-up Form}

Use this pop-up form, illustrated in Section 7.1.21, to maintain details of student applications. The pop-up in the company record is the most convenient way of entering these details as you will normally be nominating a number of students at the same time for a specific company. {Note :These details should be cleared at the start of each Placement Session - see Section 5.1}. With the cursor in the student code field press the keyboard [F4] or click with your mouse to display the "look-up" table - select the required student and automatically insert the student's name, course, year and placement number {no chance of error - no typing!}. Only students' whose "required" flags are enabled in student records are displayed. Click on the Job Ref drop-down to select the required job (only jobs where the number of vacancies is greater than zero are listed.)

Enter application and interview dates if known using the dd/MM/yyyy format {as defined via International/Regional settings in Windows} - invalid dates will not be accepted. Alternatively use the Pop-up calendar which automatically uses 4 digit years from 2000. The "offer" and "accept" Yes/No toggles make it easy to see the offers made and those accepted. The "placed" field is a read-only flag from the student's record, to inform you of the current status. The "info" field may be used for job references, or other, details if required. You may enter as many students as you like as the window automatically scrolls to accommodate any number of students. The three new toggle fields "I", "R" & "S" introduced in version 3.0 may be used to monitor items (application forms etc.) "issued" to students, "returned" to the Placement Office and "sent" to the company. Just leave these toggle fields blank if you do not wish to monitor these details.

7.1.11 Add New Placement Details {Pop-up Form}

Use this pop-up to add new placement records, where you may look-up the details of the placed student and job vacancy automatically via drop-down lists.

7.1.12 Placement Details {Pop-up Form}

The placement pop-up, illustrated in Section 7.1.21, displays details of past and present students as well as visiting tutor, supervisor's names etc. **Note :** the Summary text region should contain information about the actual placement - project details etc. The Job Details memo text region is designed for other information, such as how to get there, who the visiting tutor should contact, reminders etc. This Job Details text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

Note : click on the Tasks Button if you want to maintain a record of visits etc.

Any displayed details may be updated at any time.

7.1.13 Student Records {Pop-up Form}

Use this pop-up to view student records while browsing the company form

7.1.14 Company Jobs {Pop-up Form}

Use this pop-up to enter new jobs and to maintain details of any existing jobs at the company.

7.1.15 Company Tasks {Pop-up Form}

Use this pop-up to maintain details of any company tasks, consultancies etc.

7.1.16 Copying a Company Record

Use the Copy button to copy a complete company record. You will need to modify the company code in the copied record so as to make it unique, otherwise it can't be saved. Use [Esc] or the Undo buttons to abort.

7.1.17 Deleting a Company Record

Use the Delete button to delete a complete company record. It is normally best to keep most records for accurate historical records. For safety you are always given the option of cancelling a record delete operation. The PineSoft database structure will not allow you to delete a company record if there have been any student placements at the company, as deleting such companies would lead to inaccurate placement reports!

7.1.18 Exporting Data to a Word Mail Merge File

It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Word Mail Merge Format. (Text .txt file format is used). You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility.

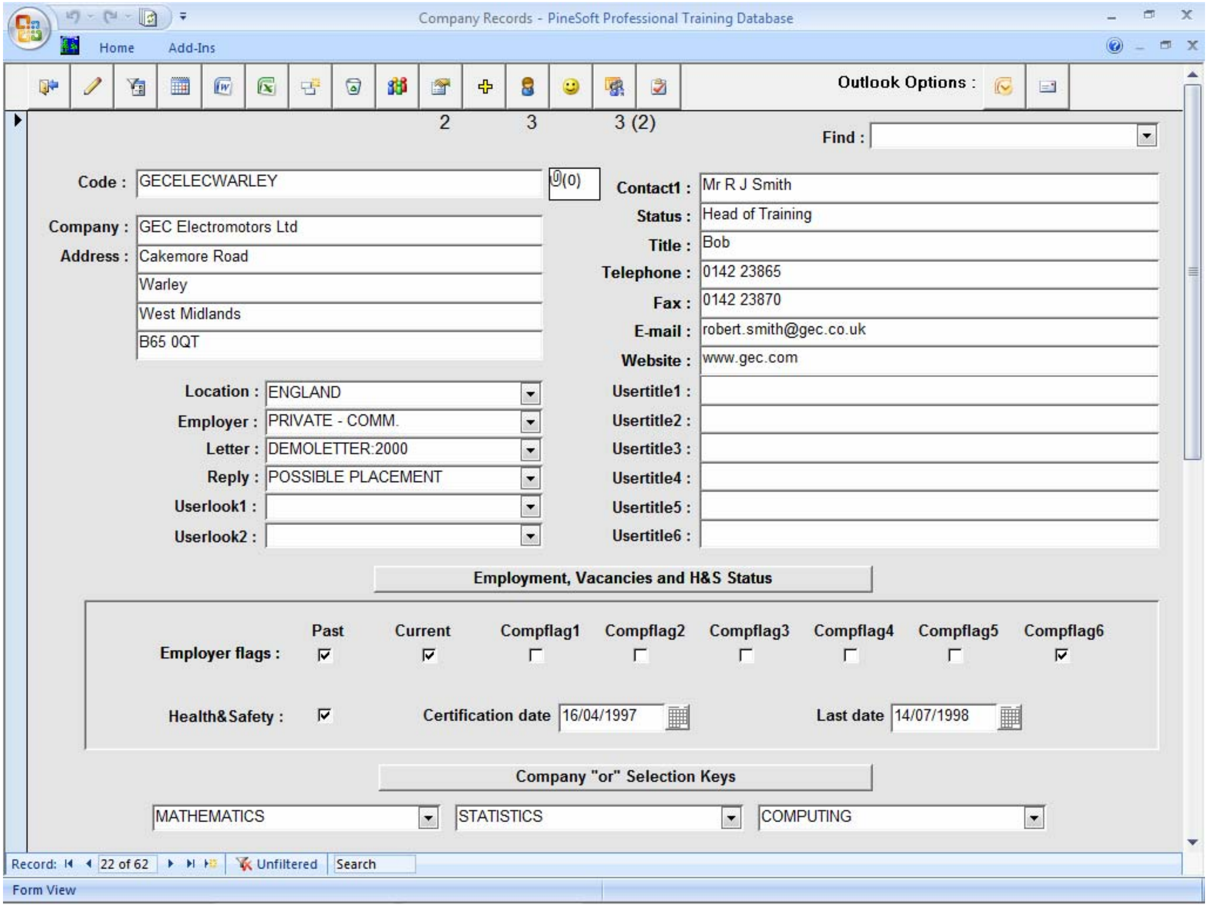
Exported data may then be accessed directly from Word using the User Friendly options available - see your Microsoft Word documentation for details.

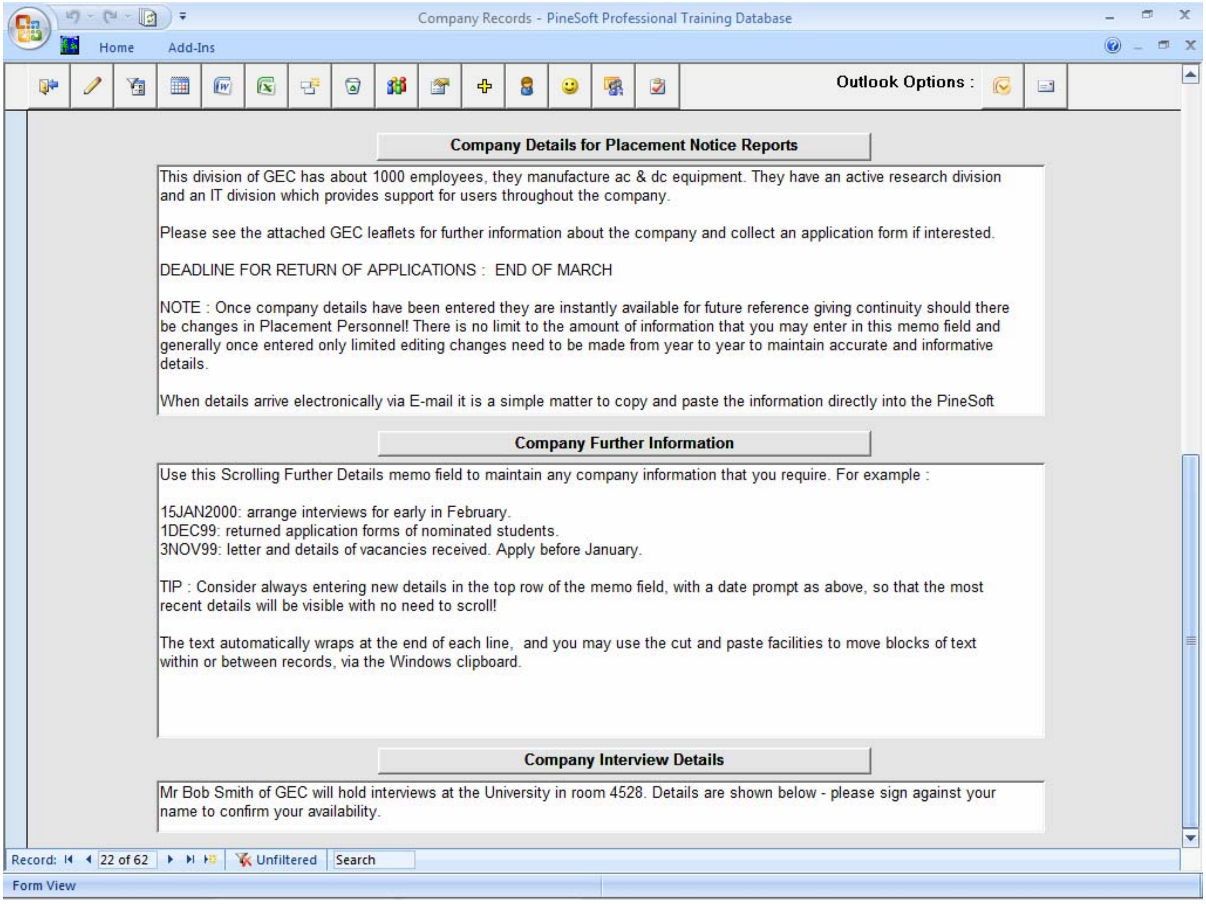
7.1.19 Exporting Data to a Microsoft Excel File

It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Excel Format. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility.

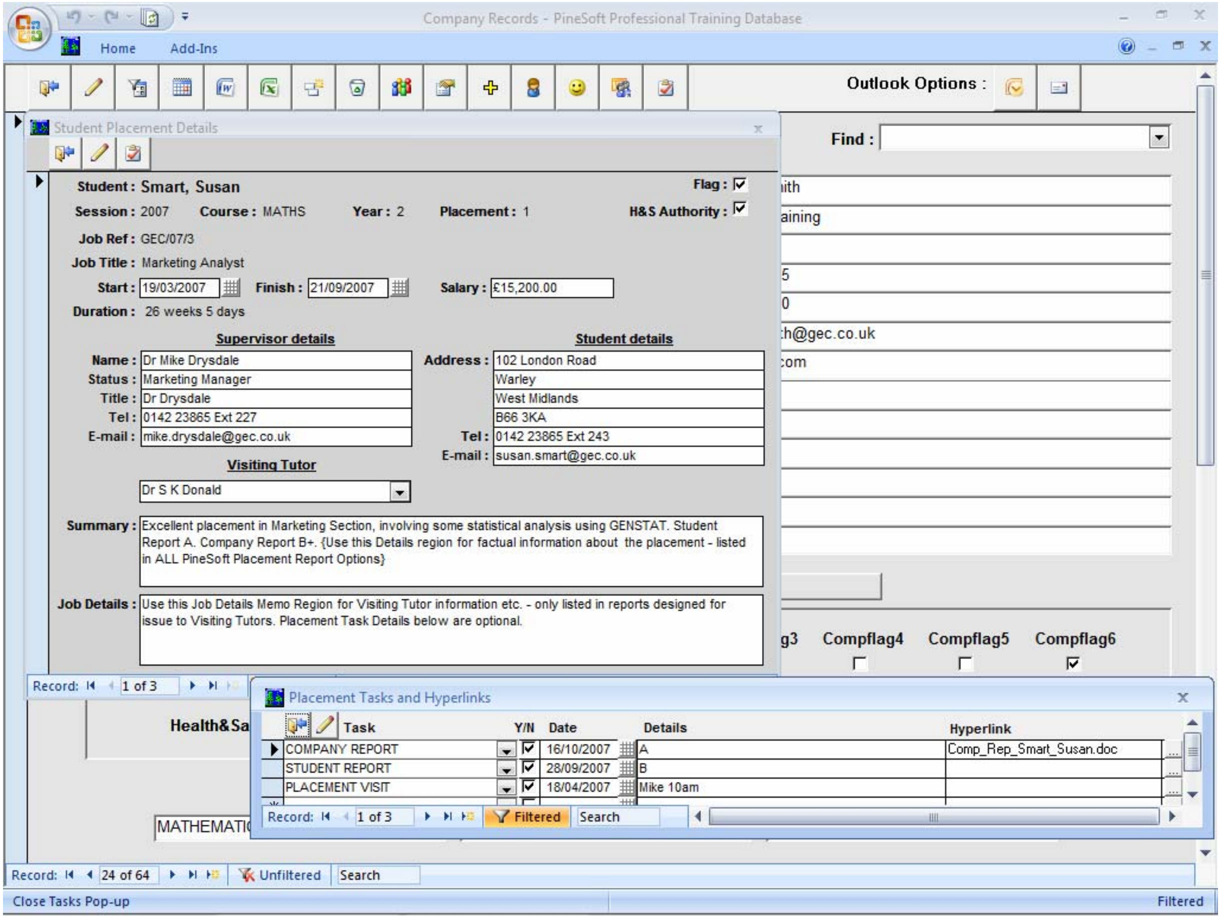
Exported data may then be accessed directly from Excel - see your Microsoft Excel documentation for details.

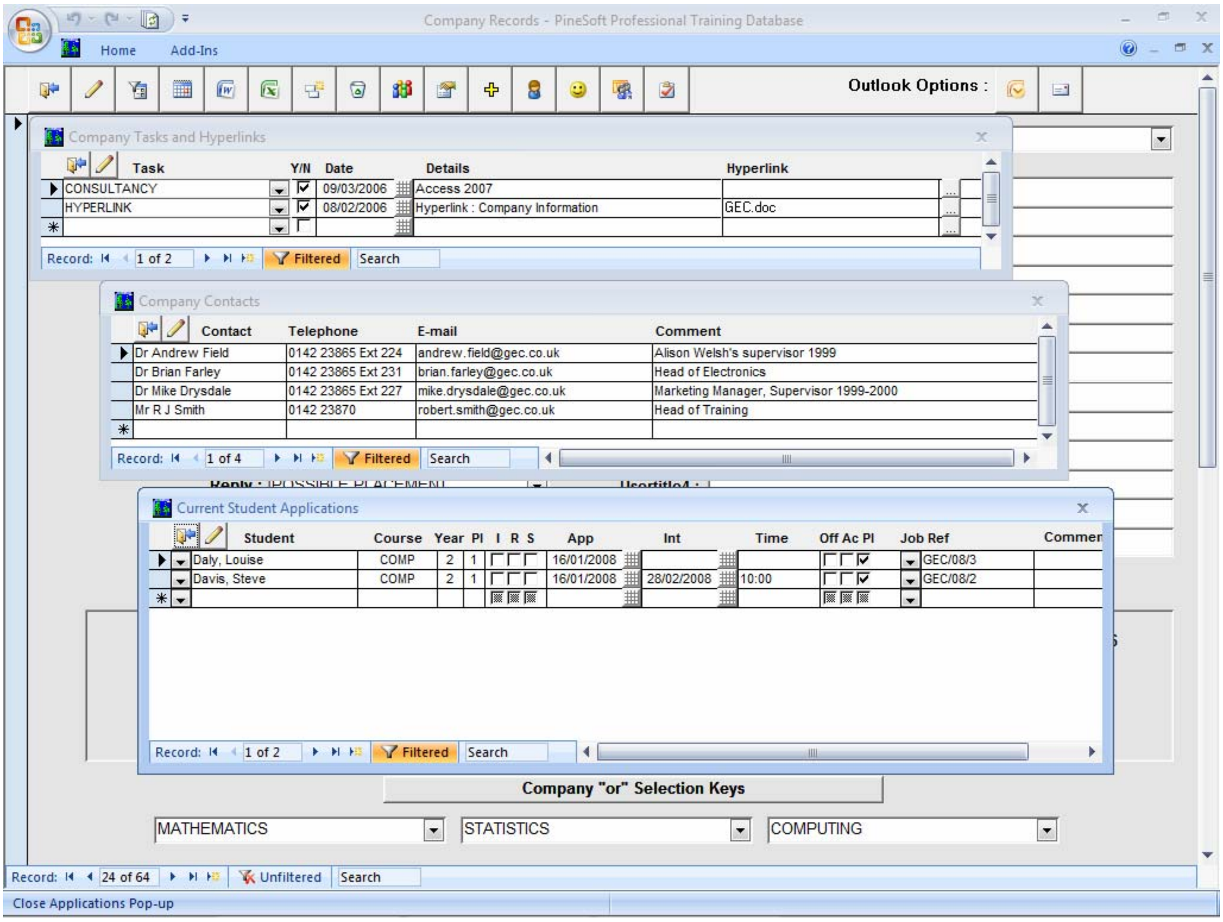
7.1.20 Illustration of a Typical Company Record





7.1.21 Illustration of a Typical Company Record with Pop-up's





7.2 Student Examine/Edit {Main Student Database}

7.2.1 Main Student Information

The first page of a student's record contains basic student details. Each student record must be given a unique student code. Use the format SURNAME_FORENAME and the application will automatically insert entries in the surname,fname, mailname and title fields - quite a time saver! If you omit the under-score character "_" the automatic insertion will not take place. Use unique codes, such as SMITH_JOHN1, SMITH_JOHN2 etc if you have duplicate student names.

For the correct operation of mail and report options it is essential that you complete entries for surname,fname, mailname, title, year, placement number, session and course fields. As these are "required fields" you have to provide entries before you can save the record. These details should be entered carefully as this information is frequently used in other parts of the database and entered later via "look-up" tables. {For the Academic Year October 1999/2000 enter the session field as 2000}.

The fields for mail name, title, home & term address are used in the Mail option {see section 7.4} for standard letters and address labels. You may use the copy button, , to copy term address to home address fields if they are the same. The course, tutor, nationality and letter fields all have associated "look-up" tables which may be displayed by pressing the [F4] key.

The User definable options1 & 2 with initial prompts userlook1, userlook2 fields also have associated "look-up" tables and give extra flexibility when selecting subgroups of records. For example, use options1 to define subject or course options such as MATH + PHYS, MATH + COMP etc.

Enter dates using the Pop-up calendar or format dd/MM/yyyy {as defined via International/Regional settings in Windows} - only valid dates will be accepted. The reference number field may be omitted if required - it will not affect the operation of the application. The placement "required" flag should be set for all students currently looking for a placement - only such students will show up in Application look-up's and Student Placement Look-up's. Once a student is placed using the "Add New Placement" pop-up the "required" flag is automatically switched off and the "placed" flag enabled. These Yes/No flags make it easy to select those students requiring a placement in the current session and those placed or still requiring a placement. The Health & Safety Yes/No toggles are used to record whether the student has been briefed and received an information pack, to comply with the Health & Safety requirements.

7.2.2 Student Photographs (Using Access 2007 Attachment field)

Using the "Student Examine/Edit" option photographs may be inserted into the database and are always displayed.

An attachment field as described in Section 7.1.2 is used to store photographs and/or other files. As these files are stored outside the database they do not contribute to data bloat! Double click the photograph to view or add files :

The best way to handle student photographs is to crop and resize them using a Paint/Image Editing package such as Microsoft Photo Editor or Paint. A little experimentation is required to obtain the best results with a small file size. The demonstration database uses digital photographs re-sized to 150 x 200 pixels (standard 4:3 photograph size) and are about 90KB. You should be able to get about 12 top quality bmp images per 1 MB of disk space. **See on-line help for the latest advice.**

7.2.3 User Definable Fields

The six field names initially labelled userlook1, 2 and usertitle1 - usertitle4 and the five User-definable toggle fields studflag1, ... studflag5 as shown in Section 7.2.16 of the manual may be customised to suit your own particular requirements using the Setup submenu options {see section 6.1}.

7.2.4 Key Fields

Keys may be used to select particular groups of records during the main menu Mail and Report options. You may define any number of keys via the Setup submenu options {see section 6.1}. The key fields have associated "look-up" tables so there is no need to remember them, simply press [F4] to display a complete list of defined keys.

7.2.5 Student Further Information {Memo Field}

Use this Memo field region to maintain any required details about correspondence etc. with the student.

7.2.6 Student Reference {Memo Field}

Enter a student reference in this auto scrolling memo field. Via the report options {see section 8} you may print references with or without a photograph of the student. Use headed paper when printing a reference which will incorporate the text "To whom it may concern" and the student's name, before the text of the reference.

7.2.7 Pop-up Forms

A major feature of the application is the ability to pop-up additional information relating to the current student record via the PineSoft Buttons displayed in the Form Header. See Section 4.4 for an overview. Click on the required button to display a pop-up. You may display more than one pop-up at a time, move them, resize them and switch easily between them by clicking with your mouse. See Section 7.2.17 for illustrations.

7.2.8 Current Application Details {Pop-up Form}

Use this pop-up form, illustrated in Section 7.2.17, to maintain details of student applications. The pop-up in the company record is the most convenient way of entering these details as you will normally be nominating a number of students at the same time for a job at a specific company. {**Note :** These details should be cleared at the start of each Session - see Section 5.1}.

As you can see the application automatically displays the details of each job the student has applied for by linking and looking up information in the applications, jobs and company database. You may enter or update application and interview dates using the dd/MM/yyyy format . Alternatively use the Pop-up calendar which automatically uses 4 digit years from 2000.

7.2.9 Placement Details {Pop-up Form}

The placement pop-up, illustrated in Section 7.2.17, displays details of past and present students as well as visiting tutor, supervisor's names etc. **Note :** the Summary text region should contain information about the actual placement - project details etc. The Job Details memo text region is designed for other information, such as how to get there, who the visiting tutor should contact, reminders etc. This Job Details text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

Note : click on the Tasks Button if you want to maintain a record of visits etc.

Any displayed details may be updated at any time.

7.2.10 Student Tasks {Pop-up Form}

Use this pop-up to maintain details of any student tasks, reports, projects etc.

7.2.11 Copying a Student Record

Use the Copy button to copy a complete student record. You will need to modify the student code in the copied record so as to make it unique, otherwise it can't be saved. Use [Esc] or the Undo buttons to abort.

7.2.12 Deleting a Student Record

Use the Delete button to delete a complete student record. For safety you are always given the option of cancelling a record delete operation. The PineSoft database structure will not allow you to delete a student record if there have been any student placements at the company, as deleting such records would lead to inaccurate placement reports!

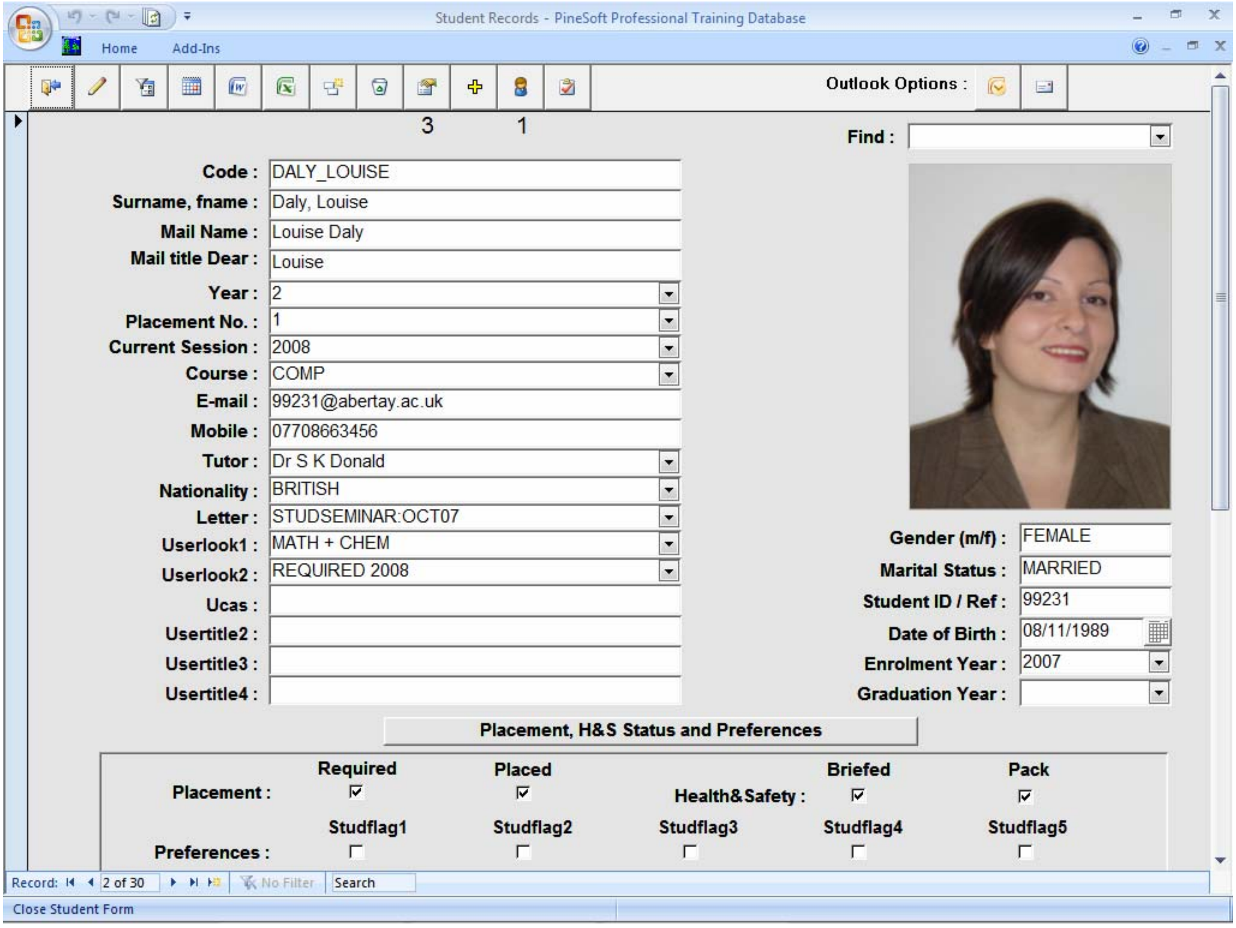
7.2.13 Exporting Data to a Word Mail Merge File

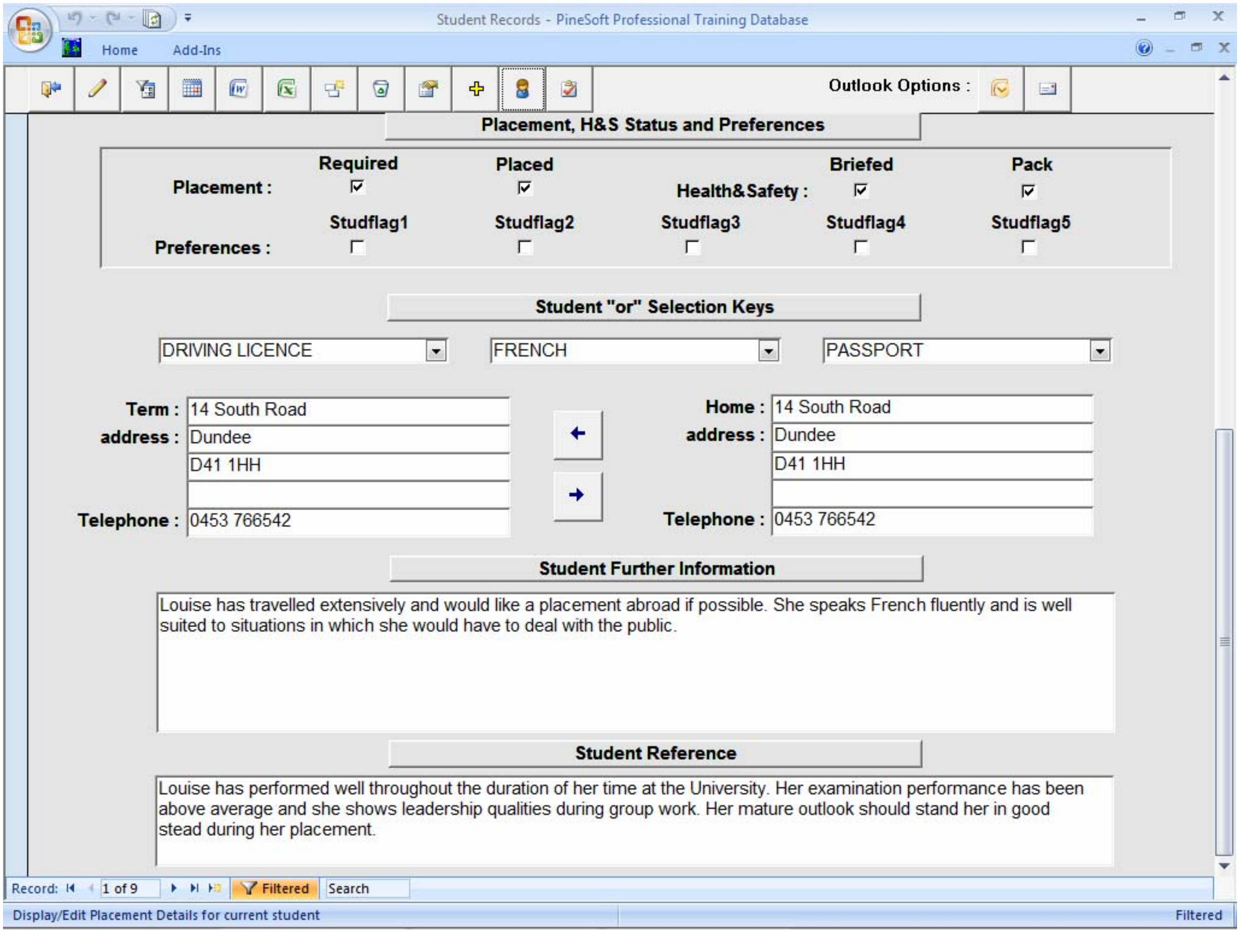
It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Word Mail Merge Format. (Text .txt file format is used). You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. Exported data may then be accessed directly from Word using the User Friendly options available - see your Microsoft Word documentation for details.

7.2.14 Exporting Data to a Microsoft Excel File

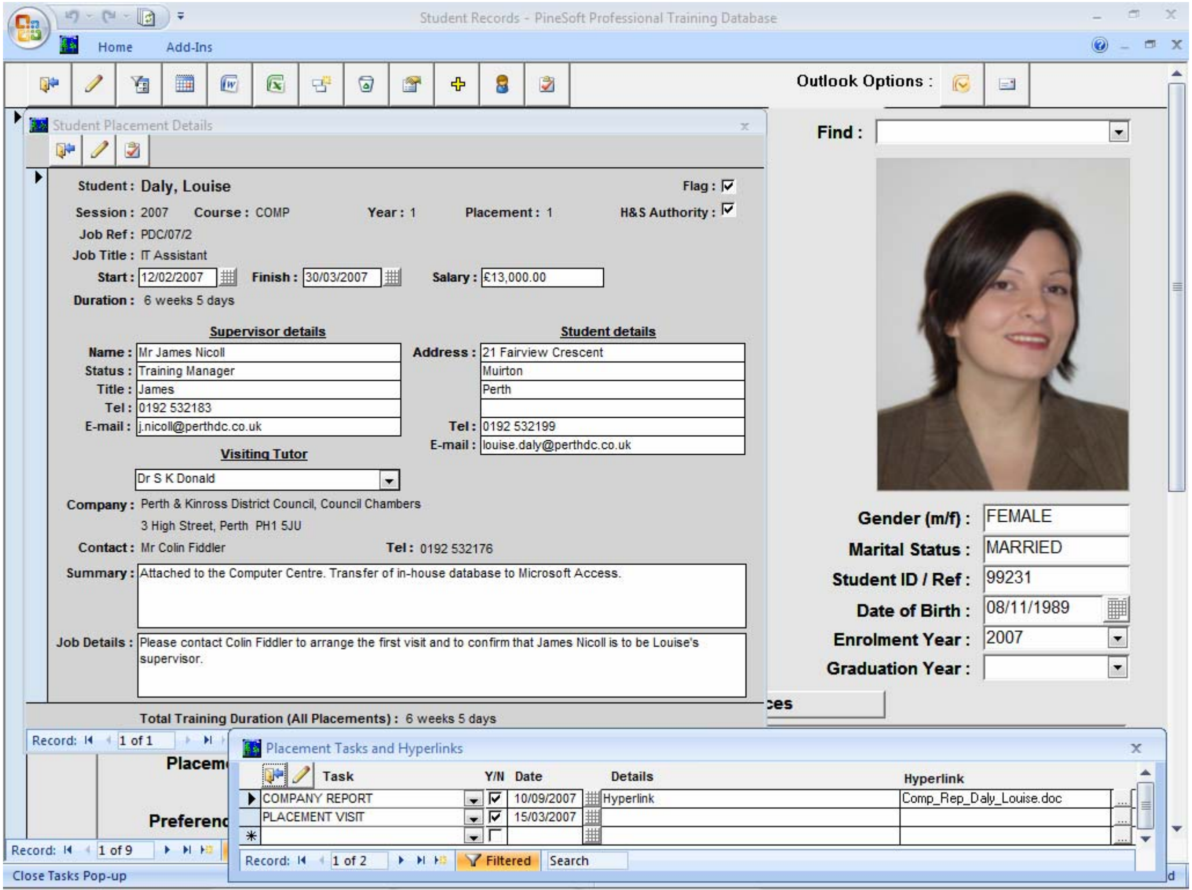
It is not likely that many users will need this feature which will export the current data set to a file in Microsoft Excel Format. You may filter the records to form any subset of records {See Section 4.3.8} before exporting the data set to give total flexibility. Exported data may then be accessed directly from Excel - see your Microsoft Excel documentation for details.

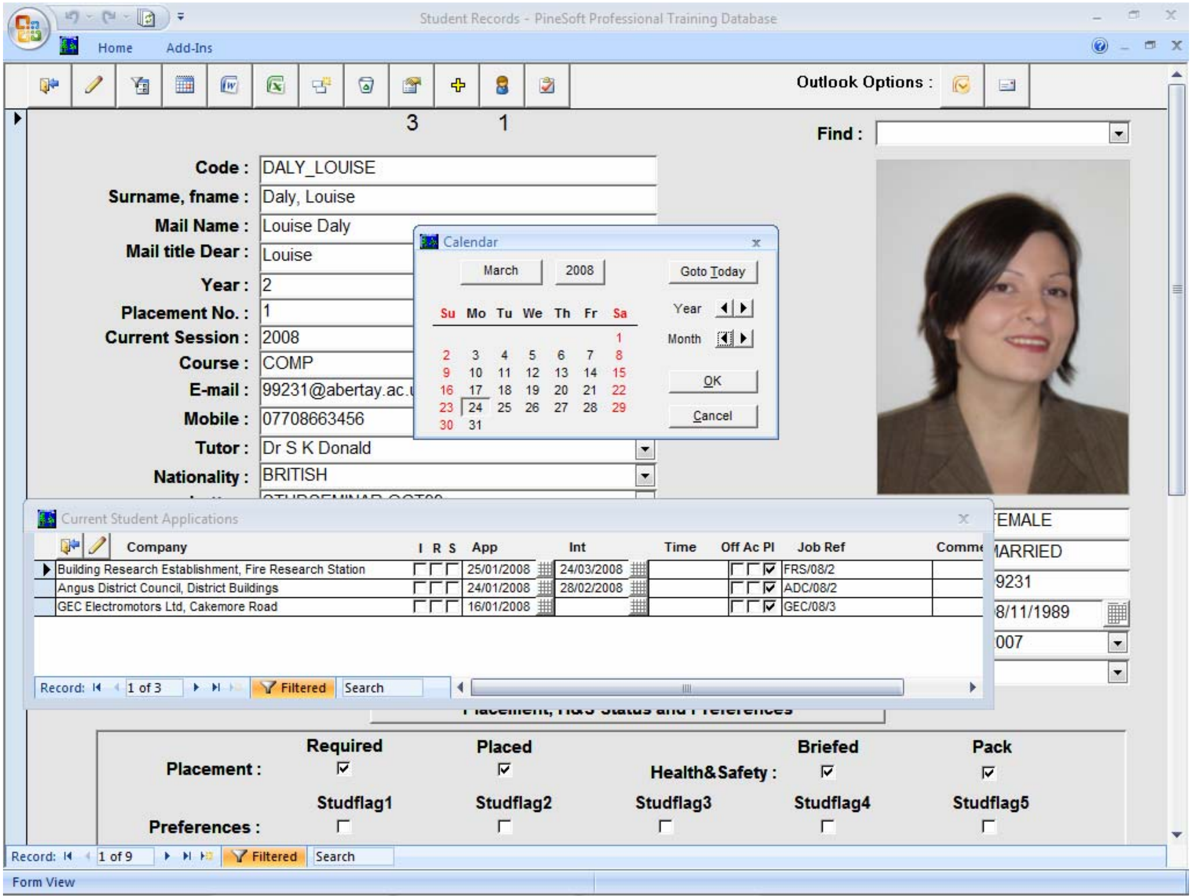
7.2.15 Illustration of a Typical Student Record





7.2.16 Illustration of a Typical Student Record with Pop-up's





7.3 Jobs Examine/Edit

The Main Menu Jobs option gives direct access to all jobs, however, it is recommended that new job details are entered via the “Jobs” Pop-up  in Company forms.

- You must define a unique Job reference (such as ADC/1). The Company code, location and Date Posted are inserted automatically.

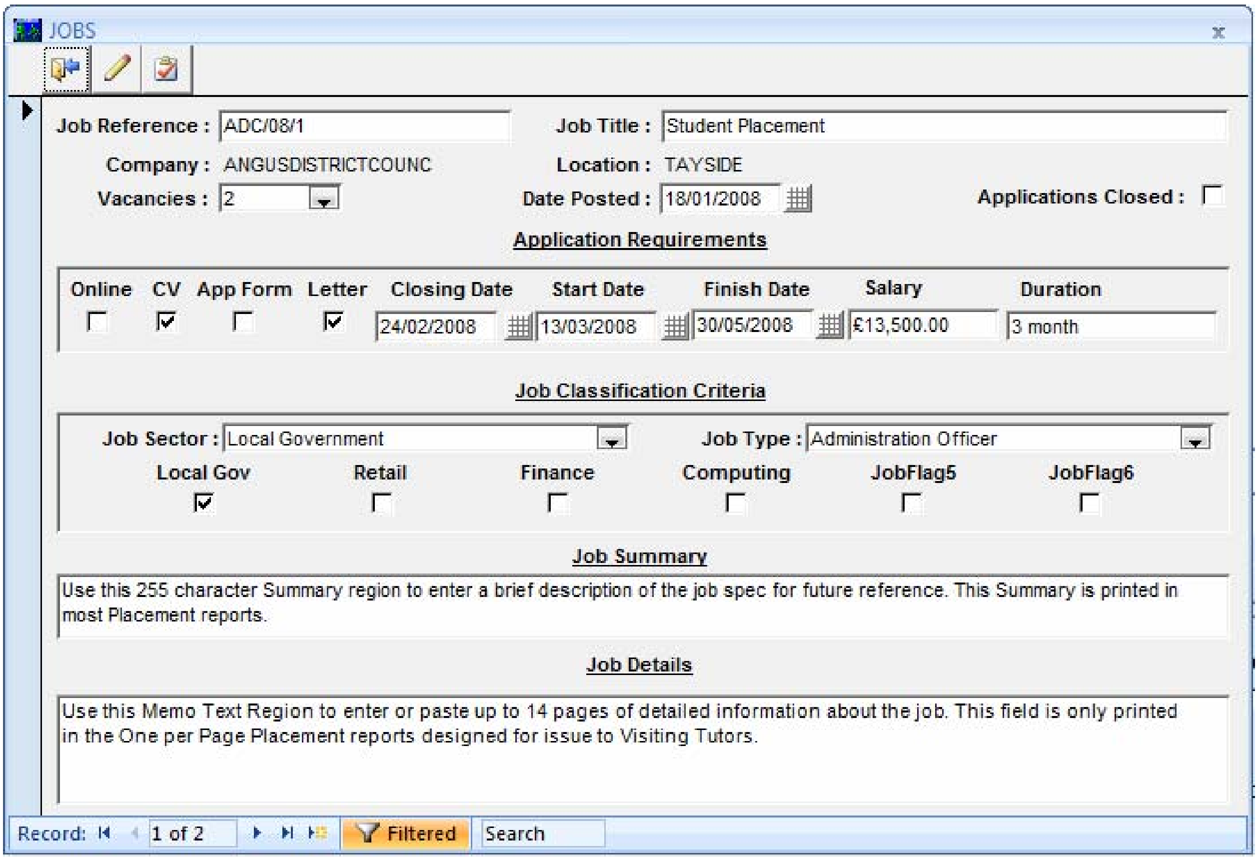
- If required you may modify the default Job Title of “Student Placement” and the default “Number of Vacancies” which is initially entered as 1.

Note : As students are placed at specific jobs the “Number of Vacancies” field is automatically reduced by one. Once equal to zero, the job will not appear in lists of available jobs in Student Application forms or Add New Placement forms. You may also “remove” a job from application and placement drop-downs by setting the Applications Closed flag.

- Complete entries in the “Application Requirements” group, if required.

- The eight “Job Classification Criteria” prompts are User-definable and may be used to select jobs matching student requirements.

- The “Job Summary” field is 255 characters long and the “Job Details” region is a Memo field (14 A4 pages) so extensive details may be entered or pasted there.



7.4 Placements Examine/Edit

The Main Menu Placements option gives direct access to all records in the placements database and is best used to browse through existing placements. **To prevent users inadvertently changing correctly entered link data, all link fields are locked.**

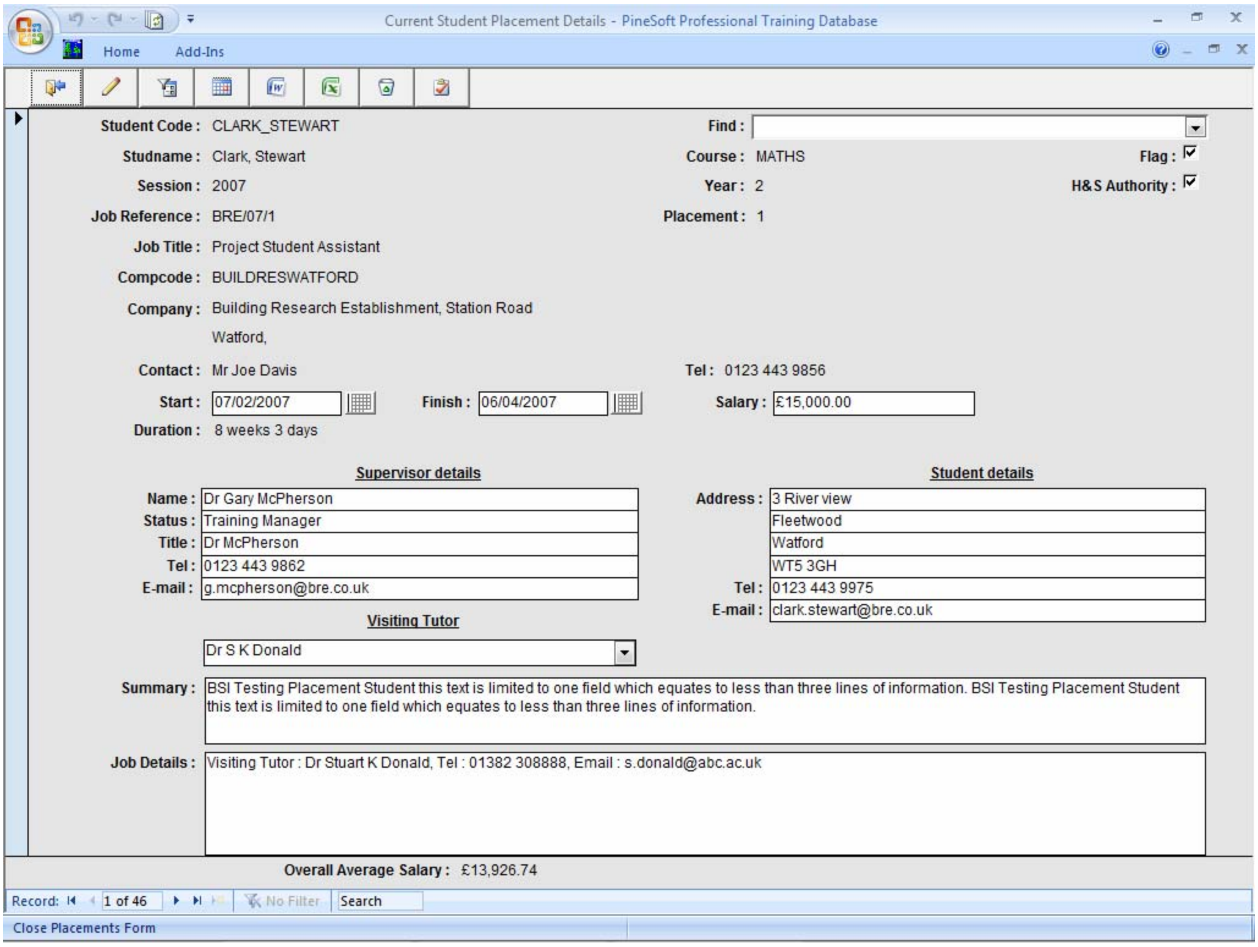
New placement details are entered via the Add Placement Pop-up in Company forms.

- Use the Student Code drop-down list to select the required student; the student's name, course, session, year and placement number are entered automatically by looking up the information in the relevant student record **(only students whose "required" flag is enabled are displayed - it is clearly of crucial importance that student details in the Main student database are correct - use the Main Menu Student Examine/Edit option to check or correct the information, if required.)**

- Use the Job Reference drop-down list to select the required job - the job & company details are entered automatically by looking up the information in the relevant company record. The number of vacancies, for the selected job is automatically reduced by one.

Use the Visiting Tutor drop-down list to enter details of the visiting tutor, if known. {To add additional names to the visiting tutor list use the Setup Options described in Section 6.1}. Enter any other known details such as telephone numbers, emails etc. **These details may always be added or corrected later via the Main Menu or Pop-up Placement forms.**

The flag field is automatically set to Yes (checked) - you may subsequently cancel this if you need to omit a student from a placement report or letter (if he/she has left the company say.)



NOTES :

(1) The Summary text region is designed for specific information about the nature of the placement - these details are printed in all “placement” reports.

(2) The Job Details memo text region is designed for other information, such as how to get there, who the visiting tutor should contact, reminders etc. This Job Details text is only printed in the One Per Page Full Placement Reports designed to give comprehensive details to Visiting Tutors.

(3) Click on the Tasks Button  if you want to maintain a record of actual visits, return of reports etc. - see in Section 7.1.21 for an illustration of the Tasks pop-up when opened.

(4) Use the Examine/Edit Current Placement Options, if required, to browse existing records - sort on Student Code to identify any duplicate records which are easy to delete.

7.5 Letters Examine/Edit

You may create an unlimited number of letters and these letters may be Mail Merged to incorporate details of company contacts, supervisors, students etc. See section 8.2 of the Report/Mail Output options for full details.

A typical letter is shown in Section 7.6.1. Each letter is given a unique letter code of your choice. Use codes that you will easily recognise, for easy selection during Mail Merge output. For example, MAILSHOT1:1JUNE99, GECELEC:5JAN99 etc.

To give as much flexibility as possible the application incorporates three fields Ref1, Ref2 and Date which print above the address and three fields header1, 2, 3 which print on the right hand side of the page below the address. The main letter text region is a Rich-text Memo field – mark a section of text to display font and formatting options.

Via the Printer Setup options you will be able to adjust the margin settings for printed letters so you should have enough flexibility to position any required references or date to suit your particular headed paper. It may be that you decide to use only one or two of the six fields. For example use header1, 2 or 3 for the date if you prefer to see it on the right hand side of your letters.

Note : once you have experimented and decided on which fields to use you can reposition and resize the fields used so that they are displayed together when you view letters in datasheet format. PineSoft buttons for copying, deleting and exporting data to Microsoft Word or Excel are again available in the form header - the use of these buttons was discussed in the sections on Examining/Editing Company and Student records.

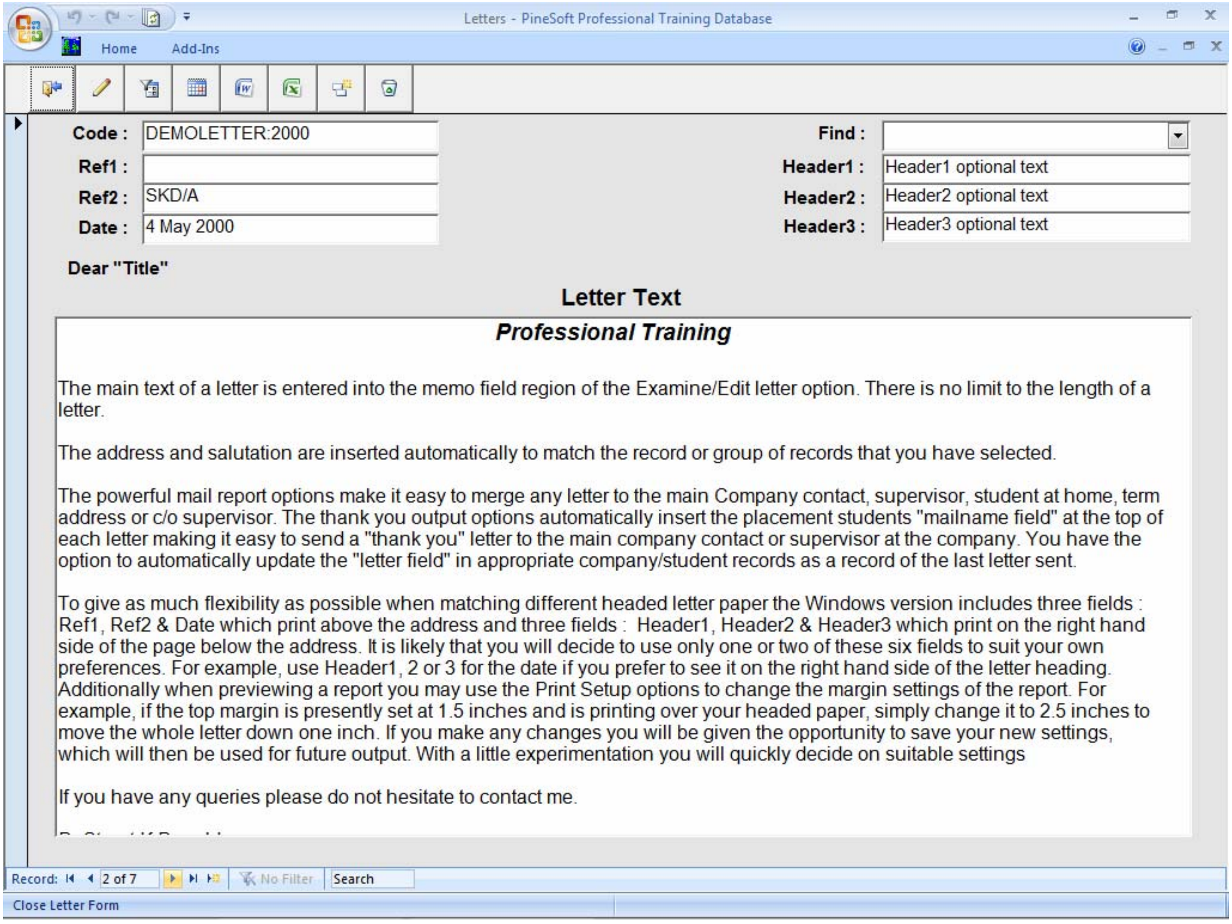
7.6 Memos Examine/Edit

You may create an unlimited number of memos and these memos may be printed with or without a “MEMO Header” which incorporates Institute and Department names. See section 8.2 of the Report/Mail Output options for full details.

A typical memo is shown in Section 7.6.1. Each memo is given a unique code of your choice. The use of informative date stamped codes for memos, such as CVSEMINAR:7NOV99 is recommended and will act as a prompt come the following November that it is time to circulate details about the seminar on C.V. preparation. The main memo text region is a Rich-text Memo field – mark a section of text to display font and formatting options.

PineSoft buttons for copying, deleting and exporting data to Microsoft Word or Excel are again available in the form header - the use of these buttons was discussed in the sections on Examining/Editing Company and Student records.

7.6.1 Illustration of a Typical Letter and Memo record



Letters - PineSoft Professional Training Database

Home Add-Ins

Code : DEMOLETTER:2000

Find :

Ref1 :

Header1 : Header1 optional text

Ref2 : SKD/A

Header2 : Header2 optional text

Date : 4 May 2000

Header3 : Header3 optional text

Dear "Title"

Letter Text

Professional Training

The main text of a letter is entered into the memo field region of the Examine/Edit letter option. There is no limit to the length of a letter.

The address and salutation are inserted automatically to match the record or group of records that you have selected.

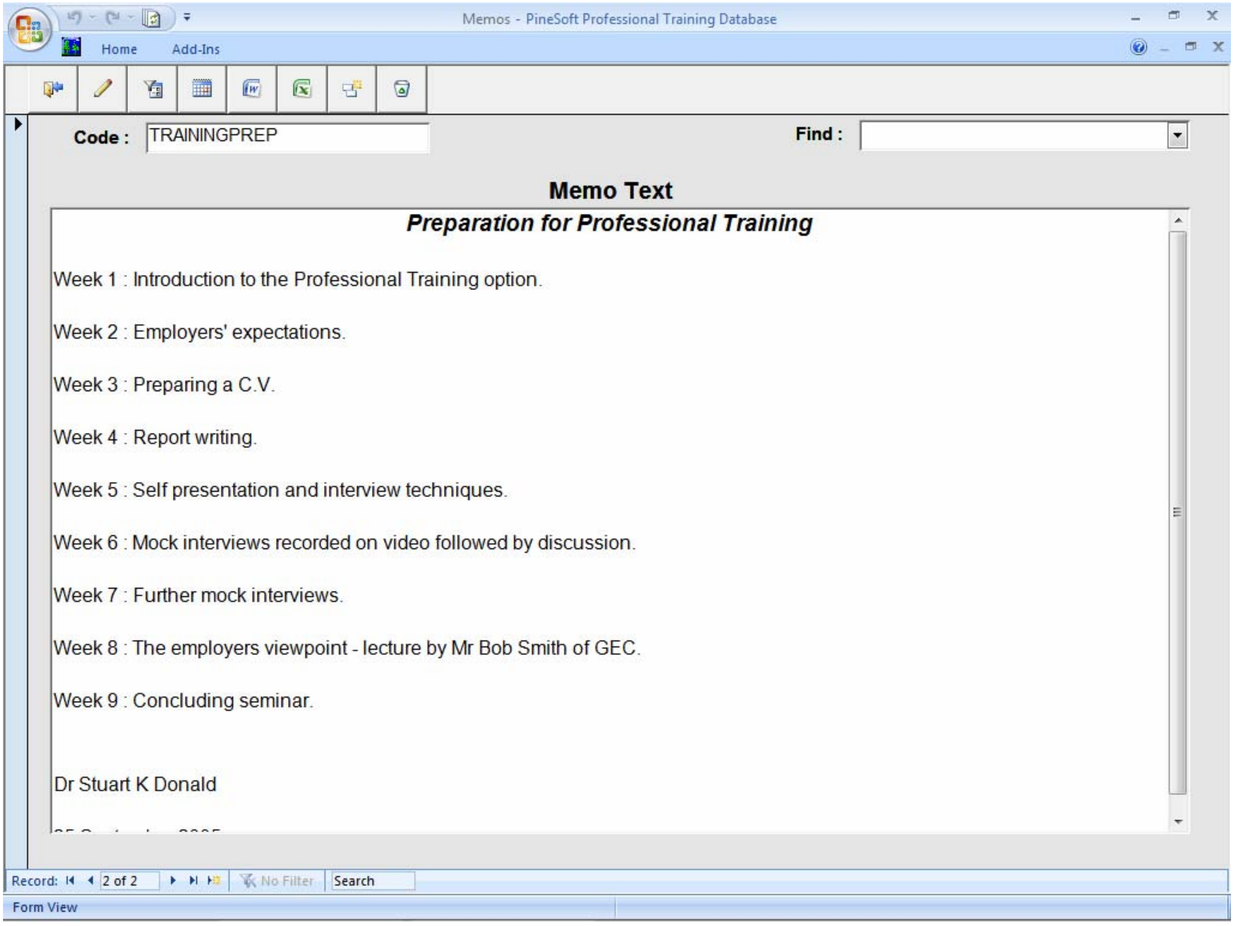
The powerful mail report options make it easy to merge any letter to the main Company contact, supervisor, student at home, term address or c/o supervisor. The thank you output options automatically insert the placement students "mailname field" at the top of each letter making it easy to send a "thank you" letter to the main company contact or supervisor at the company. You have the option to automatically update the "letter field" in appropriate company/student records as a record of the last letter sent.

To give as much flexibility as possible when matching different headed letter paper the Windows version includes three fields : Ref1, Ref2 & Date which print above the address and three fields : Header1, Header2 & Header3 which print on the right hand side of the page below the address. It is likely that you will decide to use only one or two of these six fields to suit your own preferences. For example, use Header1, 2 or 3 for the date if you prefer to see it on the right hand side of the letter heading. Additionally when previewing a report you may use the Print Setup options to change the margin settings of the report. For example, if the top margin is presently set at 1.5 inches and is printing over your headed paper, simply change it to 2.5 inches to move the whole letter down one inch. If you make any changes you will be given the opportunity to save your new settings, which will then be used for future output. With a little experimentation you will quickly decide on suitable settings

If you have any queries please do not hesitate to contact me.

Record: 2 of 7 No Filter Search

Close Letter Form



Memos - PineSoft Professional Training Database

Home Add-Ins

Code : TRAININGPREP

Find :

Memo Text

Preparation for Professional Training

Week 1 : Introduction to the Professional Training option.

Week 2 : Employers' expectations.

Week 3 : Preparing a C.V.

Week 4 : Report writing.

Week 5 : Self presentation and interview techniques.

Week 6 : Mock interviews recorded on video followed by discussion.

Week 7 : Further mock interviews.

Week 8 : The employers viewpoint - lecture by Mr Bob Smith of GEC.

Week 9 : Concluding seminar.

Dr Stuart K Donald

Record: 2 of 2 No Filter Search

Form View

7.7 Applications Examine/Edit

The Applications Main Menu option is designed to give access to the underlying database table for Student Applications. This table refers to **Current Applications** and must be deleted at the start of a new session.

7.8 Contacts Examine/Edit

The Contacts Main Menu option is designed to give access to the underlying database table for Extra Company Contacts.

Note : you will generally view placement, application and contact details from the main database tables via the pop-up forms which automatically display the appropriate linked records.

7.9 Tasks & Hyperlinks Examine/Edit

The Tasks & Hyperlinks submenu gives access to the Company, Student, Jobs and Placement tables for monitoring tasks such as Consultancies, Reports, Placement Visits etc. You may easily define hyperlinks to external files, so you may, for example, link to Student CV's in word or pdf format.

7.10 Health & Safety

The Health & Safety option gives access to a summary of all the H&S requirements for all placed students. The PineSoft Filter by Form option make it easy to filter required records to check for any shortcomings.

8 : Report/Mail Output

8.1 Report List

8.1.1 Overview of Report Options

Over 70 report options are provided to enable you to analyse and summarise the data contained in the databases of the application. Output for each report may be previewed on screen, then output to a printer or a file on disk. The reports are date stamped, page numbered and incorporate Institution and Departmental/School Headers to give customised output.

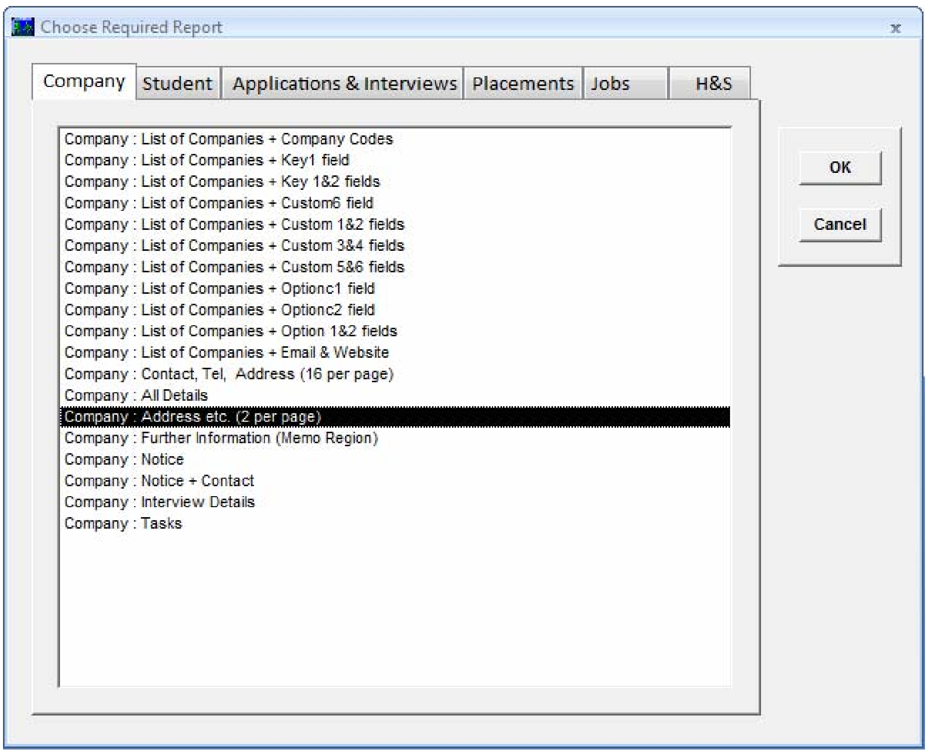
Via the use of "bullet-proof" dialog box choices you may choose particular subgroups of records using company codes, student name, course, session, year, tutor etc. The actual dialog box options will match each particular report group. The illustration below focuses on selecting the "Company Address + Other Details" report which lists records three per printed page.

Note : an alternative and flexible method of selecting any number of records at random, is provided by the "Select Individual Records" option.

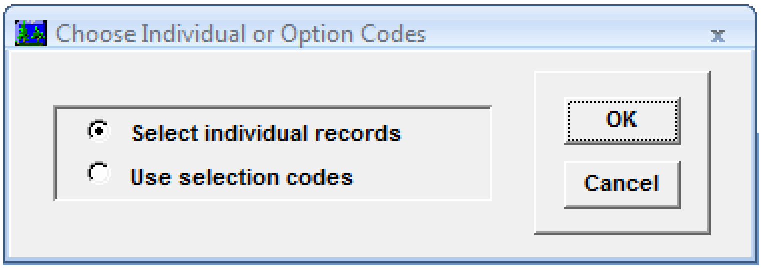
To enable you to locate specific reports more easily they have been listed in 6 groups. An overview of each group of reports is given in Section 8.1.3, as new reports are added from time to time - see the application for the latest options.

8.1.2 Example, showing how to select, preview & print a report

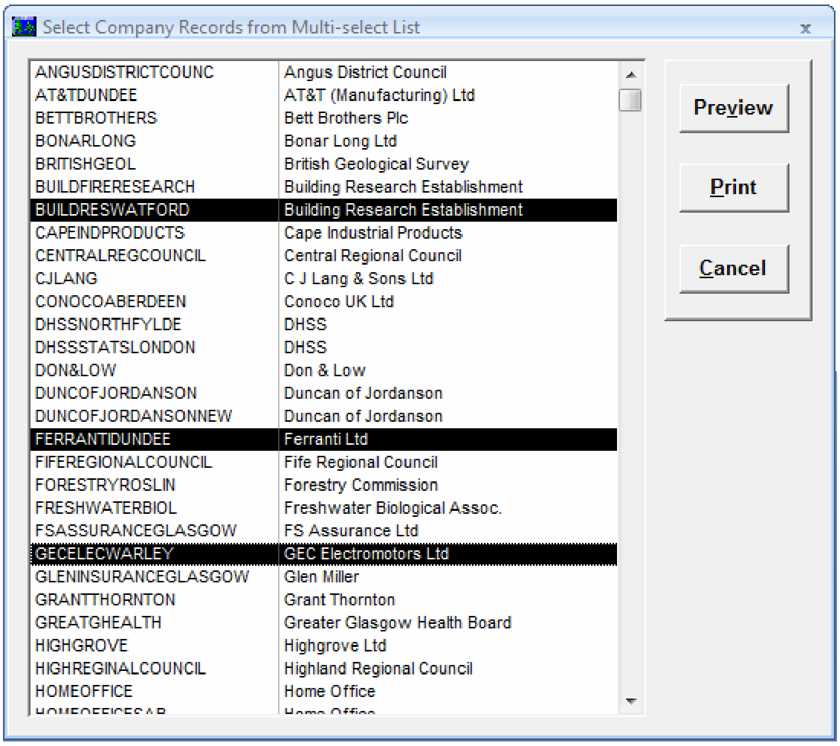
Use the "Report List" button on the Main Menu, illustrated in Section 3 of this manual, to display the Select Report Dialog, shown below.



Click on the required report tab (Company in the above illustration) and use your mouse or cursors to highlight the required report and then click on OK to select the report and display the "Choose Individual or Option Codes" dialog box shown on the next page. {With the keyboard press [TAB] to cycle between the list, OK & Cancel buttons.}

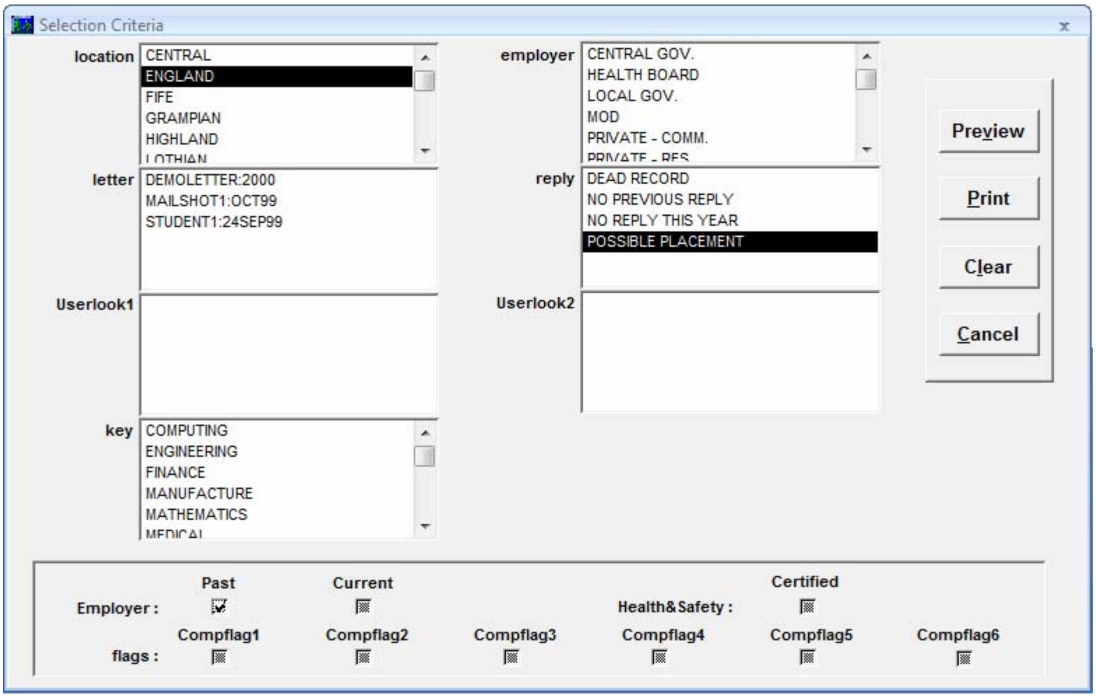


If you require to Select individual records at random, check the top radio button, shown above, then click on OK to display the “Select Company Records” screen, shown below. The 32 bit version uses the Access Multi-select List box. Pressing a letter will take you directly to the first company code starting with that letter {only the first letter may be used in this dialog box}. Alternatively use your mouse or cursors to navigate the list. Select codes by clicking with your mouse - hold down the Ctrl key to make multiple selections. {With the keyboard press [TAB] to cycle between the list and available buttons.} When you have completed your selections click on the “Preview” button to display the report on screen as shown in Section 8.1.2. Alternatively you may click the “Print” button to print directly to the default Windows Printer.

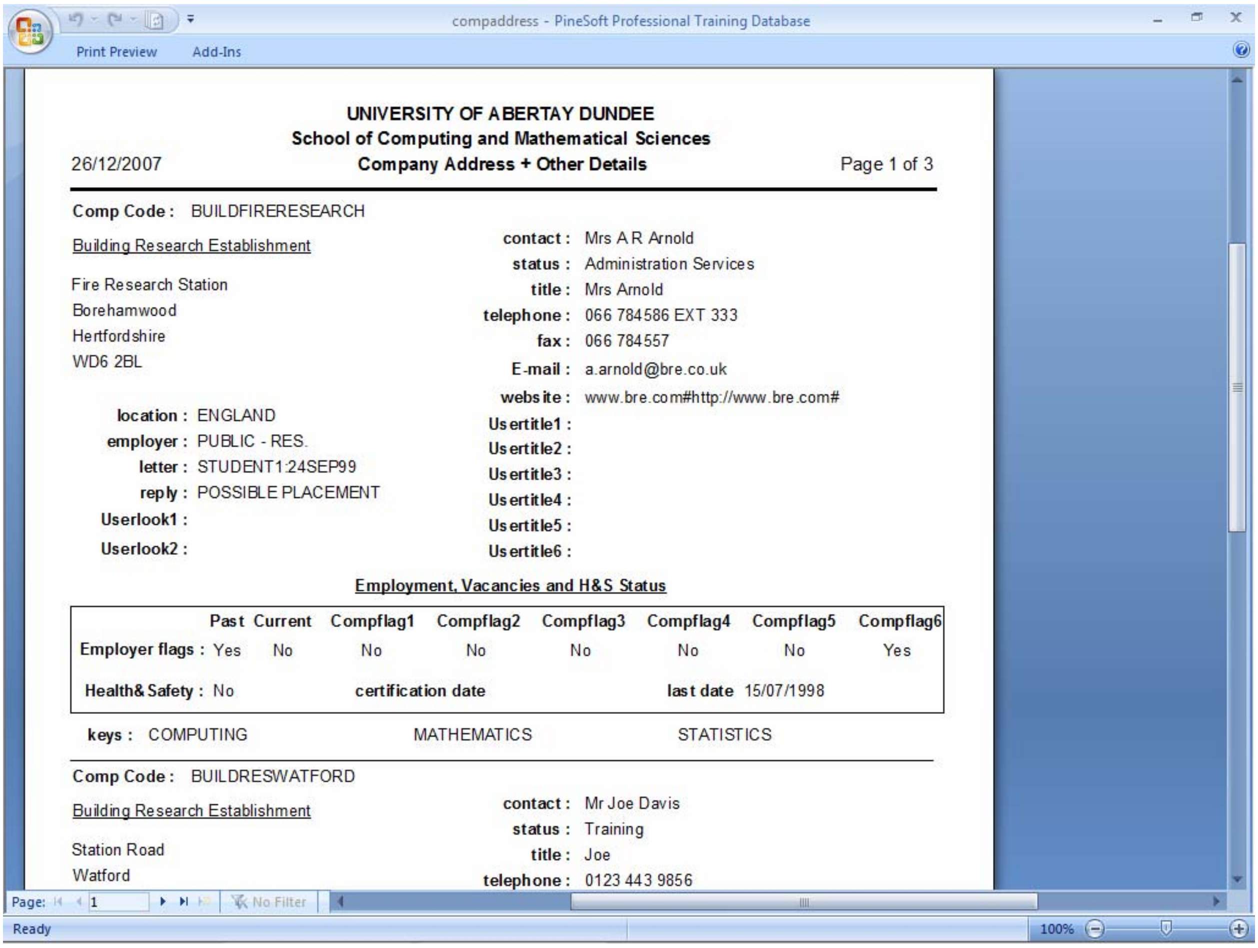


When the Available list is active pressing a letter will take you directly to the first code starting with that letter {only the first letter may be used in this dialog box}. Alternatively use your mouse or cursors to navigate the list. Select codes by double-clicking the code or clicking on the top arrow between the two list boxes. {With the keyboard press [TAB] to cycle between the lists and available buttons.} You may select as many records as required which are displayed in the “Selected” list. When you have completed your selections click on the “Preview” button to display the report on screen as shown on the next page. Alternatively you may click the “Print” button to print directly to the default Windows Printer.

In addition to the selection of records at random explained above, you may select records based on appropriate Look-up codes. To do this you require to use Selection codes, check the lower radio button in the “Choose Individual or Option Codes” Dialog box and click on OK to display the “Selection Criteria” screen shown on the next page. Make no selections to include all records, or narrow your choice by clicking on required codes. Yes/No toggle fields such as the one for past employer have three settings and give great flexibility. Initially when shaded grey all records would be included. When checked (with a tick or cross) only Yes responses are selected and if coloured white only No responses are selected. Clicking on a toggle box cycles through the three options. Finally, click the “Preview” button to display the report on screen as shown on the next page. Use the “Clear” button to reset all selections.



Typical Report in Screen Preview Mode



8.1.3 List of PineSoft Report Options

The list of possible report options has increased over the years in response to requests made by PineSoft customers. They are designed to give as much flexibility as possible and it is not likely that you will regularly use more than a few of the available options. The Preview Report facility will enable you to examine reports on screen before deciding whether or not to print them. Over time further report options may be added so check the applications Report Select Dialog list or the latest Readme file for the latest details.

At the launch of PineSoft Version 12 in 2008 the following list of report options had increased to over eighty.

Company	:	List of Companies + Company Codes
		List of Companies + Key field 1
		List of Companies + Key fields 1 & 2
		List of Companies + User definable custom6 field
		All details, including current applications & placement details
		Address + other details {2 records per page}
		Further Information {Memo field}
		Notice of company address + company details for Placement Notice board
		Notice - as above plus contact details
		Interview details with dates etc. for display on Placement Notice board
		Tasks (Consultancies, Short Courses etc.)
Student	:	Class List + Personal Tutor
		Class List + Student ID
		Class List + Optional reference number
		Class List + Custom field 1
		Class List + Custom fields 1 - 2
		Class List + Custom fields 1 - 4
		Class List + Key fields 1 - 2
		Class List + Option field 1
		Class List + Option field 2
		Class List + Option fields 1 - 2
		Placements Required / Placed
		All details, including current applications & placement details
		Address + other details {1 record per page}
		Further Information {Memo field}
		Reference {Use headed paper}
		Reference + photograph of student {Use headed paper}
		Photographs (16 per page)
		Tasks (Projects etc.)
Proforma	:	1 : Student
		2 : Student + Personal Tutor
		3 : Student + Visiting Tutor

4 : Student + Custom 1 field

5 : Student + Key1 field

6 : Student + Options1 field

7 : Student + Options2 field

Applications : Interview list

Ordered by company (new page for each placement cohort)

Ordered by company (compact - continuous output)

Ordered by student (new page for each placement cohort)

Ordered by student (compact - continuous output)

Student Summary Totals

Placements : Summary with Student ID (All courses)

Summary list of placements (new page for each placement cohort)

Summary list of placements (compact - continuous output)

Summary list - latest placement details

Summary list of placements : Ordered by Location (new page each cohort)

Summary list of placements : ordered by Location (compact output)

Tasks : Ordered by student {Landscape format}

Tasks : Ordered by company {Landscape format}

Tasks : Ordered by Visiting Tutor {Landscape format}

Full List : One per page } Includes Comment text

Full List : One per page + picture } issue to Visiting Tutors

Full List : Ordered by Student }

Full List : Ordered by Student + picture } 3 records

Full List : Ordered by Location } per page

Full List : Ordered by Visiting Tutor }

Breakdown : Duration of placements + salaries

Breakdown : Location

Breakdown : Employer type

Breakdown : Employer List + number of students placed

Tasks (Visits, return of reports etc.)

JOBS : Summary (one company per page)

Full Job Details

Compact Job Details

H&S : Company Summary (Lists whether certified with date)

Student Summary (Lists all H&S requirements for students)

8.2 Mail List

8.2.1 Overview of Mail Options

Over twenty mail output options are provided to enable you to select Letters or Memos created in the PineSoft application. Output for each mail option may be previewed on screen, then output to a printer or a file on disk.

Via the use of "bullet-proof" dialog box choices you may choose particular subgroups of records using company codes, student name, course, session, year, tutor etc. The actual dialog box options will match each particular report group. The selection procedures are identical to those for Report Output discussed in the previous section. To enable you to locate specific output options more easily they have been grouped into the four classes : Letter, Label, Envelope and Memo. Details of each group of reports is given in Section 8.2.7, however, **new reports are added from time to time - see the application for latest options.**

8.2.2 Output Letters

The PineSoft application gives you great flexibility and ease of use when Mail Merging letters. You may select to output any letter created via the Examine/Edit Letters option described in Section 7.4 Each letter may be merged to the Main Company Contact, The Company Supervisor, Student at Home/Term address or c/o the main company contact or supervisor. Name, status and address of recipients are automatically merged into each letter with the use of the format Dear [Title field] giving you control over format - i.e. Dear Bob, or Dear Dr Smith as required. The line-squeeze facility ensures that no gaps are left if the status field, or any address fields happen to be blank.

In addition you may send a **"Thankyou format"** letter to the main company contact or supervisor, with the student's name automatically inserted at the top of the letter.

After printing or previewing a letter you are given the option to update the "letter code field" and "Further Details Memo Region field" in the appropriate company or student database record, to give a complete log of all letters sent.

The layout of a typical letter is shown in the appendices and has been designed to enable the use of standard DL window envelopes if required.

As indicated in Section 7.4 you will need to experiment with the use of the three fields Ref1, Ref2, Date which print above the address and the three fields Header1, Header2, Header3 which print on the right hand side below the address to suit your Headed Paper. For example, use Header1, 2 or 3 for the date if you like to see it on the right hand side. You may reposition the whole letter by using the Printer Setup options to change margin settings. For example, change the top margin setting from 1.6" to 2.0" to move everything down 0.4". With this flexibility you should be able to decide on a suitable format. After changing any options you are given the opportunity to save them as your new defaults for that particular letter/report when you close the preview/print window.

Note : when Examining/Editing Letters in datasheet view it is possible to resize and reposition the position of columns. So if you are only using header2, you may mark and drag it with your mouse so that it is displayed next to the letter code field. On closing the window you are given the option of saving your settings as new defaults.

8.2.3 Output Labels

You may select individual or groups of records and produce 16 labels per page of Standard Avery L16 Laser Labels {4" x 1&1/3" 2 column's of 8 labels per A4 sheet}. Tip : Create "blank" company records with codes ABLANK1, ABLANK2 ---- ABLANK7 to make it easy to reuse partially used label sheets starting at any label position!

8.2.4 Output Envelopes

You may select individual or groups of records and print names & addresses directly on Envelopes. The reports have initial default settings for DL size envelopes. **Please check via the Windows Printer Setup option while previewing "envelope reports" on screen that your printer is set for Landscape orientation and DL envelope paper size.** You may save any changes, on exit from the report, as new defaults for that report.

For a large mailshot I would recommend the use of labels or DL window envelopes, however, the envelope feature is very useful when you have only a few letters.

8.2.5 Output Memos

You may select a single memo and output it either with no header or a Memo header which will automatically incorporate your Institution & Department name. Again you may modify margins in the Printer Setup options to adjust the position of printed memos.

8.2.6 Export Options & Customised Letters/Reports

The default PineSoft letter output options discussed in Section 8.2.2 are easy to use and will produce high quality proportional output using an Arial font, the same as the main body text in this User Manual.

The Export options are designed for those users who require greater control over fonts, attributes {bold, italic etc}, point size, the ability to insert PineSoft database fields at any point of a letter etc.

You may select individual or groups of records as usual and then export the PineSoft data to a file name of your choice in Microsoft Text or Excel Mail Merge format. You then require to exit the PineSoft application, and load Microsoft Word for Windows {or other Word Processor} where you may create customised letters, labels & envelopes with a large number of built in options to help you in MS Word etc. See the on-line help or the Mail Merge Chapter in the Word documentation for information on how to produce very "flexible" output. For example, you could use the envelope merge format to produce a list of company contact names, addresses and telephone number using two or three column displays.

In fact you may easily produce "Customised Reports" using any PineSoft database fields to give **total flexibility**. At the University of Abertay Placement details were previously recorded laboriously using a number of Standard Pro-forma. However, these forms were easily duplicated in a Word for Windows document with data automatically merged via the PineSoft Export option {a huge time saver with no transcription errors!}- see the last report in the appendix for typical output.

Note : Once you have created a Microsoft Mail Merge document you may save it for future use. Then you only have to update the exported mail merge file {keeping the same file name} to easily output your updated results. It is not too difficult, once you get some practice, however, you may decide to stick to the default PineSoft options which are easier to use - the choice is yours.

8.2.7 PineSoft Mail List Options

The Mail list options are designed to make it very easy to output your mail to all possible recipients. The Preview Report facility will enable you to examine mail output on screen before deciding whether or not to print. See the application for additional "latest placement" options.

Letter :	Contact1
	Contact1 : Thankyou
	Supervisor
	Supervisor : Thankyou
	Student : Home address
	Student : Term address
	Student : c/o Contact1
	Student : c/o Supervisor
	Student : Placement address
Label :	Contact1
	Contact1 : Thankyou
	Supervisor
	Student : Home address
	Student : Term address
	Student : c/o Contact1
	Student : c/o Supervisor
	Student : Placement address
Envelope :	Contact1
	Contact1 : Thankyou
	Supervisor
	Student : Home address
	Student : Term address
	Student : c/o Contact1
	Student : c/o Supervisor
	Student : Placement address
Memo :	No Header
	With Header
	Large 20 point font {for extra visual impact}

8.2.8 PineSoft Export List Options

Export Company data for Microsoft Mail Merge

Export Student data for Microsoft Mail Merge

Export Placement data for Microsoft Mail Merge

9 : Miscellaneous

9.1 Notation

You need to be consistent in your interpretation of the session year 2007, 2008, ... and its relation to a particular session 2006/2007, 2007/2008, ...

In the demonstration version with placement periods from March to September, session 2007, for example, refers to the March - September 2007 placement, though the academic session would be 2006/2007 and the students entered that particular year of the course in 2006.

For consistency stick to this notation.

9.2 Importing Data

While it is very easy to export data from the PineSoft application using the Export buttons described in Section 4.4, importing data is not so straightforward as field names must match those used by PineSoft and care needs to be taken not to conflict with the Referential Integrity rules built into the application.

To import data you will need to ensure that you use the correct PineSoft field names in the first row.

The easiest method is to use “Cut & Paste Import” as described below.

Cut & Paste Import

Via the use of Microsoft's Excel you may cut records from the spreadsheet and paste them directly into the appropriate PineSoft table Please follow the steps indicated below to import company records.

(1) Display the Company Examine/Edit form and use the Filter by Form option to display a single record - this will limit the size of the exported file.

(2) Click the small - Export to Excel toolbar button to export the filtered record - Excel should be launched automatically with the record displayed.

(3) Delete the imported record(s) retaining the first row which contains the PineSoft field names. New records may be typed into the spreadsheet, or more likely - use the powerful Excel import facilities to Import required records into the spreadsheet. The code field should be given a unique upper case value.

(4) When you are finished entering data, mark all entered rows, including the first row and click the copy command in the Edit Menu in Excel.

(5) Switch back to PineSoft and click the Paste Append command in the Edit Menu, to paste the records into the company database.

NOTE : You don't need to have entries for all fields, so for example when importing into the main company database file COMPDAT you may only have data for company address & contact. The prepared file would need field names and some data for : code, company, street, town, county, postcode & contact1. If you have new data for any of the "look-up" fields such as location then you have to import the location data into the PineSoft LOCTABLE database before importing data into COMPDAT. Otherwise, you will not be allowed to import any data that would break the referential integrity rules built into the application.

9.3 Assigning or Changing the Password

The application is supplied without a password. You may define a password, if required, but will always log on to the application with user name : Admin. Don't forget it will then be your responsibility to remember the new password as you will be unable to load the application without it.

If you definitely want to assign or change a password, after loading the PineSoft application with the Main Menu displayed choose password from the tools menu bar option & complete the entries in the following Change PineSoft Password dialog box.

9.4 Changing the Attached Data File

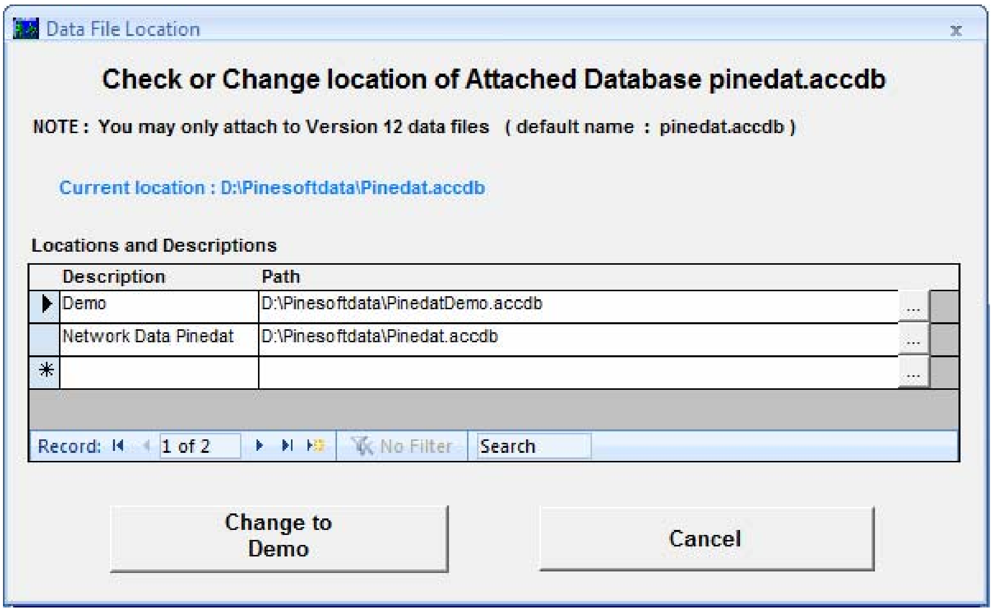
After loading the PineSoft application with the Main Menu displayed choose the "Attachments - Check / Change Location" option from the tools menu bar, to display the dialog box shown below. The Current Location of the PineSoft data file is shown, highlighted in blue - in this case:

D:\Pinesoftdata\Pinedat.accdb.

You may define paths to other locations, such as, a Network drive P: and give a description for the location. With the "Demo" row, selected below, clicking on the button indicating "Change to Demo" would create an attachment to the data file D:\Pinesoftdata\PinedatDemo.accdb

NOTE : PineSoft Version 12 will only attach to Version 12 (Access 2007) data files :

(pinedat.accdb or other .accdb files)



9.5 Technical Support

Technical support is always available. Existing customers will be kept fully informed of any enhancements - remember I not only market the software but used it daily as a Placement Manager at the University of Abertay Dundee for many years, so I am particularly keen to make it as flexible and labour saving as possible. If you have any suggestions for future developments please let me know.

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NOTE : The PineSoft Website has a useful "Downloads & Tips" page where you may download Adobe Acrobat copies of the latest User Manual, plus the latest Tips for getting the best from the PineSoft application. The Learning Centre also has Training Videos which take you through common tasks. Please use "On-line Requests" pages to provide feedback and log any requests for possible future enhancements.

10 : Appendices

10.1 Typical Printer Output

The appendices contain a number of examples of typical printer output. This small sample of the available mail and report options show the quality of output you may produce in seconds.

- Company Standard Letter : DEMOLETTER
- Memo : Illustrative Memo Header
- Report - Company : All
- Report - Company : Notice + Contact
- Report - Company : Jobs : Full Details
- Report - Applications : Ordered by student (Compact)
- Report - Applications : Interviews (All courses)
- Report - Placements : Summary : Ordered by location (Compact)
- Report - Placements : Summary (All courses) {Landscape format}
- Report - Placements : Full Listing (One per page with picture}
- Report - Placements : Breakdown : Location
- Health & Safety Student Summary {Landscape format}
- Customised Word for Windows Report with data automatically merged

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