

PineSoft

Professional Training Database

Access 2007 / 2010 Edition

FinDonIT

PineSoft Tutorials

Version 12.6a

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
CONTENTS

INTRODUCTION	3
TUTORIAL A1 : {USING SETUP & ENTERING NEW COMPANY RECORDS}	4
A1.1 INTRODUCTION.....	4
A1.2 OBJECTIVE	4
TUTORIAL A2 : {USING REPORT OPTIONS FOR COMPANY RECORDS}	7
A2.1 INTRODUCTION.....	7
A2.2 OBJECTIVE	7
<i>Report 1 {List companies & codes for 3 new company records}</i>	7
<i>Report 2 {List company address for 2 selected company records}</i>	8
TUTORIAL A3 : {CREATING A COMPANY LETTER & PRINTING A MAIL SHOT}	9
A3.1 INTRODUCTION.....	9
A3.2 OBJECTIVE	9
A3.3 CREATING A NEW “LETTER”	9
A3.4 : MAIL SHOT LETTER TO SELECTED COMPANIES	10
A3.5 : PRINTING A LABEL OR ENVELOPE FOR SELECTED COMPANIES.....	10
TUTORIAL A4 : {ENTERING JOB DETAILS}	11
A4.1 INTRODUCTION.....	11
A4.2 OBJECTIVE	11
TUTORIAL A5 : {ADDING NEW STUDENT RECORDS}	13
A5.1 INTRODUCTION.....	13
A5.2 OBJECTIVE	13
TUTORIAL A6 : {ENTERING PLACEMENT DETAILS}	15
A6.1 INTRODUCTION.....	15
A6.2 OBJECTIVE	15
TUTORIAL A7 : {USING THE GROUP EMAIL OPTIONS}	17
A7.1 INTRODUCTION.....	17
A7.2 OBJECTIVE	17
A7.3 FILTERING RECORDS TO INCLUDE, THEN CREATING EMAIL	17
TUTORIAL A8 : {CUSTOMISED REPORTS}	18
A8.1 INTRODUCTION.....	18
A8.2 PROCEDURE	18
<i>Report 1 {Class List Report}</i>	19
<i>Report 2 {Proforma Report}</i>	19
TUTORIAL A9 : {USING THE EXPORT TO WORD OPTIONS}	20
A9.1 INTRODUCTION.....	20
A9.2 PROCEDURE	20

Introduction

These Tutorials show how to use the PineSoft Professional Training database to tackle many of the essential tasks such as adding company & student records, using report options, creating a sample letter and performing a mail shot.

The tutorials do not indicate every single key stroke to be used, however, all the main steps are indicated with additional notes highlighting important procedures. It is assumed that you are familiar with the “Getting Started” section {pages 6 - 19} of the User Manual which explains how to navigate through the application, using mouse or keyboard.

Regular references are made to Sections of the User Manual, which should act as a reference source when working through these tutorials – this avoids unnecessary duplication of text and illustrations in this tutorial text. Another valuable reference source is available in the on-line context sensitive help within the application. This help is activated by pressing the [F1] key or clicking the Help button  in the Add-Ins Tab.

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

All tutorial examples are based on the Demonstration Version of the application, which is supplied complete with “dummy” data. The only difference between the demo and full versions is that report output will include headers for the University of Abertay Dundee, School of Computing & Advanced Technologies.

It is recommended that new users of the package gain experience with the demo version, to get a good feel for the application before using the full version.

Tip : When you do start to use the **full version** use the Setup Options to define your required location codes, nationalities, staff names etc. Start using the report & mail options at an early stage to confirm that you have entered the first few company and student records correctly - this should build your confidence. If you have any initial queries please contact PineSoft at an early stage - please don't type in a thousand or more records before calling to discuss matters.

Tutorial A1 : {Using Setup & Entering New Company Records}

A1.1 Introduction


Tom Goodfellow is a new member of staff at the University. He has a number of “personal” company contacts {listed later} and is particularly interested in the Professional Training option in degree programmes. Tom is to be allocated personal tutees and will also visit students on placement.


A1.2 Objective

You will learn how to use the “Setup Submenu Options” {User Manual Section 5} to add Tom’s name to the list of tutors and visiting tutors. You will also define a new company option code {TOM’S CONTACTS} to make it easy to identify & select Tom’s new company records. Finally you will add the new company records to the Main Company Database using the “Company Examine/Edit Option” {User Manual Section 7.1}.

- 1) Load the PineSoft Professional Training Database Demonstration Version {if you have not already done so} by double-clicking the PineSoft icon in the PineSoft Windows Group. {User Manual section 3}

With the Main Menu displayed click the “Setup” button to enter the Setup Submenu. {displayed in Section 5.1 of the User Manual}

- 2) Click the Setup “Tutor” button to display the tutors form. Then Click on  to enable Edit Mode.


Click directly to the right of the Add New Record button  and add the tutor's name {then press Enter}.

TUTOR : Mr T Goodfellow



to end the Edit session & return to the Setup Submenu.

- 3) Follow the same steps as described in 2) but this time use the Setup “Vis. Tutor” button to enter Edit mode for Visiting Tutors, and enter Mr T Goodfellow as a Visiting Tutor.

- 4) Click the Setup “Company Lookup 3” button to display the company Lookup Optionc3 form. Then Click on  to enable Edit Mode.

Click directly to the right of the Add New Record button  and add a new optionc3 code.


Optionc3 : TOM'S CONTACT

NOTE : This field will automatically convert your text to uppercase (indicated by an 'underline' in the input box).

Click on the Close button  to end the Edit session & return to the Setup Submenu.

Click on the Close button  to close the Setup Submenu & return to the Main Menu.

5) With the Main Menu displayed click on the "Company" button in the "Examine/Edit Data" column to enter Edit mode for company records. {As illustrated in Section 7.1.20 of the User Manual}


Click on the Add New Record button  located at the bottom left of the screen and add the company details shown below.

Use the **Drop-down lists** to enter the location, employer & key fields.

1st record

Code :	CORMACKTRAINING	Contact :	Dr Alasdair Brown
Address :	Cormack Engineering	Job Title :	Training Manager
	Viewlands Industrial Estate	Title :	Alasdair
	Perth	Tel :	0148 876522
	PH8 6NT	Fax :	0148 876428
		Mobile :	
Location :	TAYSIDE	Email :	ABrown@Cormack.co.uk
Employer :	PRIVATE	Website :	
Letter :		usertitle1 :	
Reply :			
userlook1 :			
userlook2 :			
userlook3 :	TOM'S CONTACT	usertitle6 :	

2nd record

As the company address for the second record is the same as the first, use the Copy button  located in the Form Header {Section 4.4 of User Manual} to copy the new record - then modify the company code & other fields, as required.

Code : CORMACKPERSONNEL
Address : Cormack Engineering
Viewlands Industrial Estate
Perth
PH8 6NT

Contact : Mrs Joy Barclay
Job Title : Personnel Manager
Title : Mrs Barclay
Tel : 0148 876427
Fax : 0148 876428
Mobile :
Email : JBarclay@Cormack.co.uk

Location : TAYSIDE
Employer : PRIVATE
Letter :
Reply :
userlook1 :
userlook2 :
userlook3 : TOM'S CONTACT

Website :
usertitle1 :
usertitle6 :

Click on the Add New Record button  and add the 3rd company details shown below.


3rd record


Code : DOLANVIDEO
Address : Dolan Video Consultants
35 Aberdeen Road
Forfar
Angus

Contact : Mr David Scott
Job Title : Financial Manager
Title : David
Tel : 0167 556789
Fax : 0167 556790
Mobile :
Email : DScott@Dolanvideo.co.uk

Location : TAYSIDE
Employer : PRIVATE
Letter :
Reply :
userlook1 :
userlook2 :
userlook3 : TOM'S CONTACT

Website :
usertitle1 :
usertitle6 :

Note : All new records are added to the end of the database table. They are ordered alphabetically using the Company Code when you close the Edit window. To check this click on the Close Window button to return to the Main Menu, then re-enter Company Edit mode. The two new Cormack records are record numbers 12 & 13. You may switch to Datasheet view  to browse through records at more than 20 per screen to locate particular records {as an alternative to using the find Drop-down menu options}.

To return to the Main Menu when required click on the Close Window button :  (if prompted, there is no need to save clipboard data).

Tutorial A2 : {Using Report Options for Company Records}

A2.1 Introduction

We will use the three new company records created in Tutorial 1 to illustrate two alternative and easy to use methods for selecting particular records to include in report output. The extensive use of pick-lists presented in dialog boxes {User Manual Section 8.1} provides a bullet-proof method of selection with no need to remember or type in codes etc.

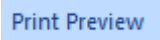

A2.2 Objective

You will learn how to use the “Report List Options” {User Manual Section 8.1} to list details relating to the new company records, created in Tutorial 1, selected via the company optionc3 code or by selecting records at random.

Report 1 {List companies & codes for 3 new company records}


- 1) With the Main Menu displayed click on the “Report List” button in the “Report/Mail Output” column to open the “Choose Required Report” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Highlight the Report “Company : List of Companies + Company Codes” and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Click on the “Use selection codes” radio button and then OK to display the “Selection Criteria” form illustrated in Section 8.1.2 of the User Manual.
- 3) Click the Userlook3 field “TOM’S CONTACT” to highlight it {press T to use incremental type-in in the Key list, if required} and then the “Preview” button to display the Report with the three new records with matching Userlook3 (Optionc3) field values. {A typical Preview screen is shown in Section 8.1.2 of the User Manual}.
- 4) Use zoom, cursors, [PgDn], etc. or mouse to browse through the displayed report.

NOTE : It is very easy to create a pdf document of any report or letter to view electronically, or include as an Email attachment.

Click on  then click on the icon  to export the pdf report

- you can keep the default name compcode.pdf and file folder location ..\documents or choose your own name and location.

Please save the pdf document for use in a later tutorial by selecting 'Publish' when prompted.

- 5) Click on the Close Print Preview button  to cancel the report pre-viewer and return to the Selection Criteria Form.

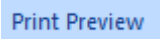

- 6) Click on the  button to close the Selection Criteria form and return to the Main Menu.

Don't forget to obtain on-line context sensitive help at any time press the [F1] key or click the help button 

Report 2 {List company address for 2 selected company records}


- 1) With the Main Menu displayed click on the “Report List” button in the “Report/Mail Output” column to open the “Choose Required Report” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Highlight the Report “Company : Address etc. (2 per page)” and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 3) Click on the “Select individual records” radio button and then OK to display the “Multi-select List” form illustrated in Section 8.1.2 of the User Manual.
- 4) Use the Multi-select List, explained in Section 8.1.2 of the User Manual, to highlight the records with codes CORMACKTRAINING & DOLANVIDEO {Hold down the Ctrl Key to highlight more than one row.} With these two records highlighted click on “Preview” to produce a Preview of the report on screen. {A typical Preview screen is shown in Section 8.1.2 of the User Manual}.
- 5) Use cursors, [PgDn], etc. or mouse to browse through the displayed report.

NOTE : It is very easy to create a pdf document of any report or letter to view electronically, or include as an Email attachment.

Click on  then click on the icon  to export the pdf report

- you can keep the default name compaddress.pdf and file folder location ..\documents or choose your own name and location.

Please save the pdf document for use in a later tutorial.

- 6) Click on the Close Print Preview button  to cancel the report pre-viewer and return to the Select Company Records Form.

- 7) Click on the  button to close the Selection Criteria form and return to the Main Menu.

Tutorial A3 : {Creating a Company Letter & Printing a Mail shot}


A3.1 Introduction

So far we have added “Tom’s” three new company records to the database and used the “report options” to produce two reports. Tom would like to inform his two personal company contacts Alasdair & Dave of his move to Dundee and at the same time send them some literature about the Combined Studies Degree Programme at the University. To do this we will use the “Letters Examine/Edit” option {User Manual Section 7.5} and the “Mail List” option {User Manual Section 8.2}.

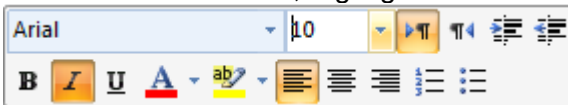
A3.2 Objective

You will learn how to use the “Mail Options” to create a new letter and print a mail shot to two selected companies.

A3.3 Creating a new “letter”

- 1) With the Main Menu displayed click on the “Letters” button in the “Examine/Edit Data” column to display the Letters Edit form displayed in Section 7.6.1 of the User Manual.
- 2) Click on the Add New Record button  and add the letter details shown below.

NOTE : To format the main letter content, highlight the relevant section and hover to reveal the

formatting toolbar. 

Code : TOMCONTACT:JAN2011

Ref 1 :

Header 1 :

Ref 2 :

Header 2 : Tel : 01382 308606

Date : 5 January 2011

Header 3 : Email : tg@tay.ac.uk

Dear {Title inserted}

COMBINED STUDIES : PROFESSIONAL TRAINING


This is just a short note to inform you of my recent move to the University of Abertay Dundee. I enclose a leaflet, which gives details of our new Combined Studies Scheme which I believe may be of interest to you.

I would like to extend an invitation to you to visit the University to discuss possible collaborative ventures and/or possible placement opportunities.


Kind Regards,

Yours sincerely,

Mr Tom Goodfellow

Use the Close Window button  to exit Edit and return to the Main Menu.


A3.4 : Mail shot letter to selected companies

- 1) With the Main Menu displayed click the “Mail List” button in the “Report/Mail Output” column to open the “Choose Required Mail Option” dialog box. Highlight the “Letter : Company Contact” report and click on OK to display the “Letter Dialog Box”
- 2) Highlight the letter with code “TOMCONTACT:JAN2011” and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 3) Click on the “Select individual records” radio button and then OK to display the “Multi-select List” form illustrated in Section 8.1.2 of the User Manual.
- 4) Use the Multi-select List, explained in Section 8.1.2 of the User Manual, to highlight the records with codes CORMACKTRAINING & DOLANVIDEO {Hold down the Ctrl Key to highlight more than one row.} With these two records highlighted click on “Preview” to produce a Preview of the report on screen. {A typical Preview screen is shown in Section 8.1.2 of the User Manual}.
- 5) Use cursors, [PgDn], etc. or mouse to browse through the displayed letters.
- 6) Click on the Close Print Preview button  to cancel the report pre-viewer {click Yes in the “Update Letter Codes” dialog box to automatically update the letter codes in the two selected records, then OK.} - this returns you to the Select Company Records form.

- 7) Click on the  button to close the Selection Criteria form and return to the Main Menu.

A3.5 : Printing a Label or Envelope for selected companies

Having produced our two letters we now use the “Company Label” or “Company Envelope” options to finish the task. With just two letters it is convenient to print directly onto DL envelopes.

- 1) With the Main Menu displayed click on the “Mail List” button in the “Report/Mail Output” column to open the “Choose Required Mail Option” dialog box. Click on the “Envelope” Tab then highlight the “Envelope : Company Contact” report and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Click on the “Select individual records” radio button and then OK to display the “Multi-select List” form illustrated in Section 8.1.2 of the User Manual.
- 3) Use the Multi-select List, explained in Section 8.1.2 of the User Manual, to highlight the records with codes CORMACKTRAINING & DOLANVIDEO {Hold down the Ctrl Key to highlight more than one row.} With these two records highlighted click on “Preview” to produce a Preview of the report on screen. {A typical Preview screen is shown in Section 8.1.2 of the User Manual}.
- 4) Use cursors, [PgDn], etc. or mouse to browse through the displayed report.
- 5) Click on the Close Print Preview button  to cancel the report pre-viewer and return to the Select Company Records Form.

- 6) Click on the  button to close the Selection Criteria form and return to the Main Menu.


Tutorial A4 : {Entering Job Details}

A4.1 Introduction

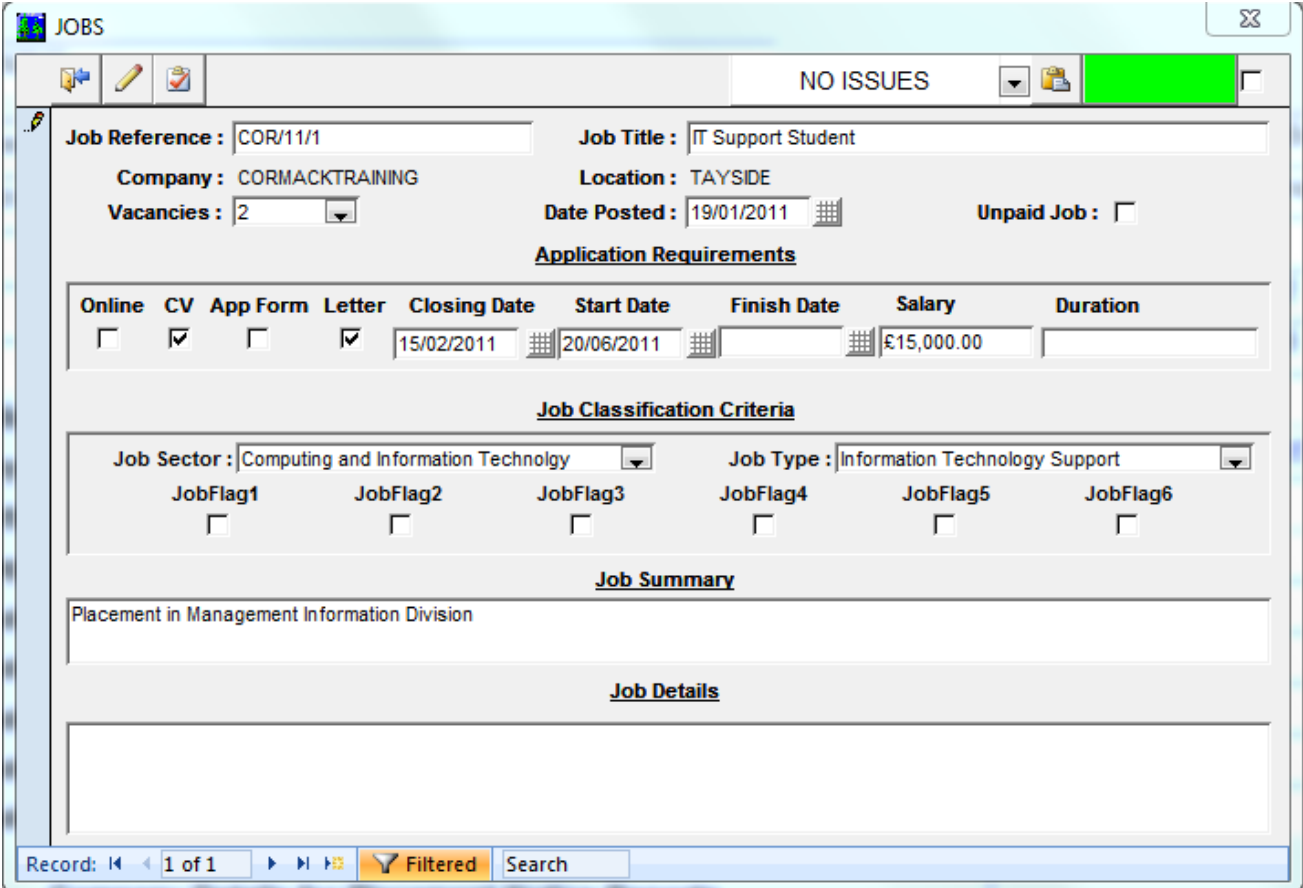
In this tutorial we will enter details of two Job Vacancies.

A4.2 Objective

You will learn how to use the “Jobs” Pop-up  Option in Company forms {User Manual Section 7.3} to enter job details for two vacancies.

- 1) With the Main Menu displayed click on the “Company” Examine/Edit button and use the “Find” drop-down list to locate and display the Company record for CORMACKTRAINING.
- 2) Click on the Display/Edit Company Jobs pop-up button .
- 3) Enter the details shown below for the “1st record” to define a job at Cormack Engineering. **You must enter a unique Job Reference - the company code and location are then entered automatically when you leave the Job Reference field.**

1st record



The screenshot shows the 'JOBS' application window with the following details:

- Job Reference:** COR/11/1
- Job Title:** IT Support Student
- Company:** CORMACKTRAINING
- Location:** TAYSIDE
- Vacancies:** 2
- Date Posted:** 19/01/2011
- Unpaid Job:**

Application Requirements

Online	CV	App Form	Letter	Closing Date	Start Date	Finish Date	Salary	Duration
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	15/02/2011	20/06/2011		£15,000.00	

Job Classification Criteria

- Job Sector:** Computing and Information Technology
- Job Type:** Information Technology Support
- JobFlag1:**
- JobFlag2:**
- JobFlag3:**
- JobFlag4:**
- JobFlag5:**
- JobFlag6:**


Job Summary

Placement in Management Information Division

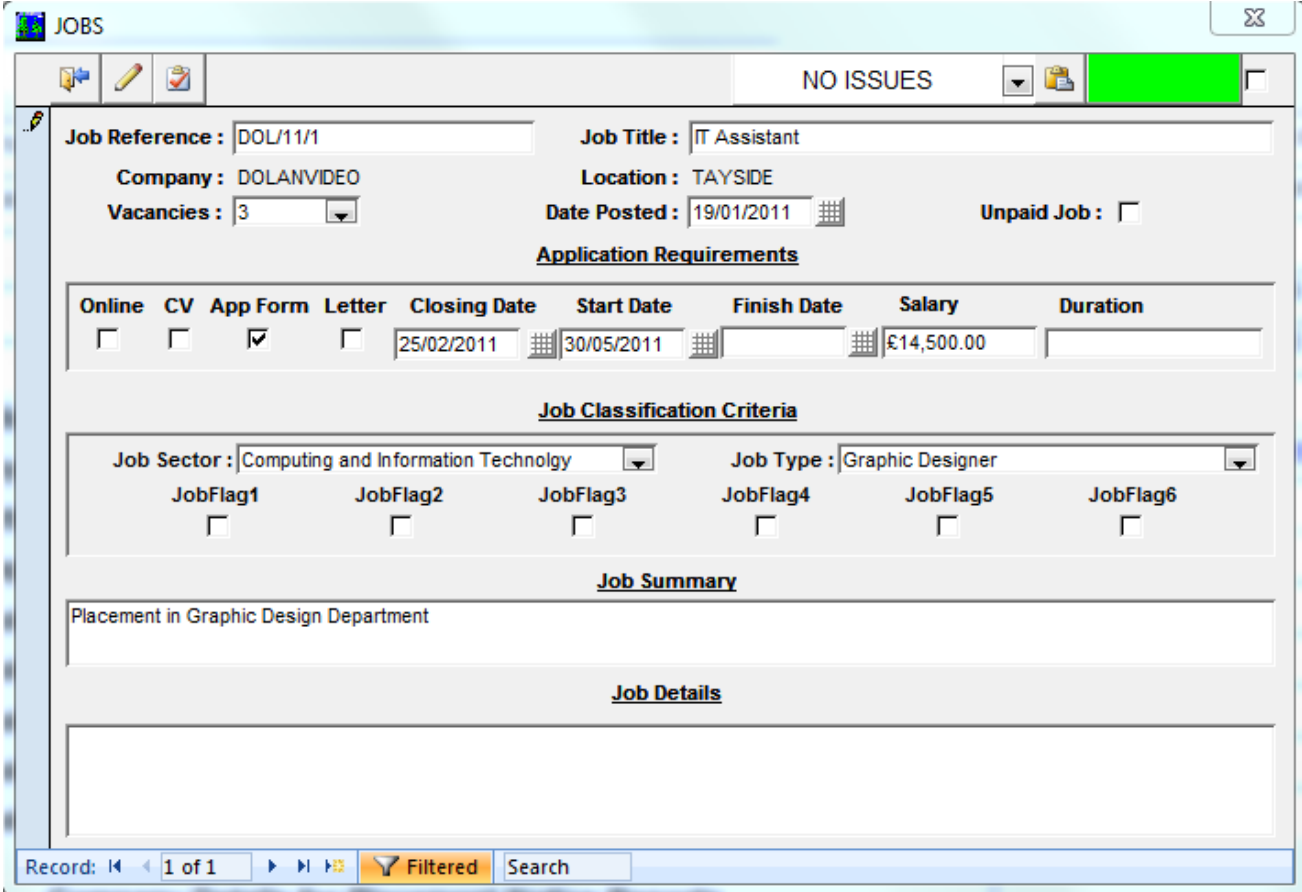
Job Details

Record: 1 of 1 | Filtered | Search

- 4) Once the details are complete close the “Jobs” pop-up and then use the “Find” drop-down list to locate and display the Company record for DOLANVIDEO.

- 5) Click on the Display/Edit Company Jobs button .
- 6) Enter details for the second job, shown below.

2nd record



The screenshot shows a software window titled "JOBS" with a toolbar and a main form area. The form contains the following fields and sections:

- Job Reference:** DOL/11/1
- Job Title:** IT Assistant
- Company:** DOLANVIDEO
- Location:** TAYSIDE
- Vacancies:** 3
- Date Posted:** 19/01/2011
- Unpaid Job:**

Application Requirements

Online	CV	App Form	Letter	Closing Date	Start Date	Finish Date	Salary	Duration
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	25/02/2011	30/05/2011		£14,500.00	

Job Classification Criteria


- Job Sector:** Computing and Information Technology
- Job Type:** Graphic Designer
- JobFlag1:**
- JobFlag2:**
- JobFlag3:**
- JobFlag4:**
- JobFlag5:**
- JobFlag6:**

Job Summary

Placement in Graphic Design Department

Job Details

Record: 1 of 1 | Filtered | Search

Once the details are complete close the “Jobs” pop-up and then click on the Close Window button  to leave the company form and return to the Main Menu.

At any future time you can easily use the “Jobs” Main Menu option or the pop-up in Company forms to re-load details in order to update/correct the data.

Tutorial A5 : {Adding New Student Records}

A5.1 Introduction

We will assume that we have two late student arrivals, who wish to join the first year of the Post-graduate Diploma in Information Technology course. We need to add their details to the PineSoft database.

A5.2 Objective

You will learn how to add new student records to the Main Student Database using the “Student Examine/Edit Option” {User Manual Section 7.2}. To be consistent with the supplied “demo data” we will take the session to be 2010-2011 {i.e. session = 2011 in database}. You will use the “copy button” to speed up data entry by copying repetitive field entries.

- 1) With the Main Menu displayed click on the “Students” button in the “Examine/Edit Data” column to enter Edit mode for student records.

Click on the Add New Record button  and add the student details shown below.

Note : for the correct operation of the “Mail” & “Report” options **it is essential** that you provide entries for the top 8 fields : student code; surname, fname; mail name; title; year; placement number; session and course code. {To ensure the integrity of your data these are required values so you won't be allowed to save a student record if any of the 8 fields are empty}.

Start by entering ADAMS_GRANT in the Code field, then press TAB or ENTER.

Use the **Drop-down lists** to enter the course code, personal tutor, nationality, Gender and Marital Status


Check the “required” placement field (this makes the student available for placements).

1st record

Code :	ADAMS_GRANT	{Student name details entered automatically on exit from Code field}
Surname, fname :	Adams, Grant	Placement Required : <input checked="" type="checkbox"/>
Mail Name :	Grant Adams	Student ID / Ref : 20108567
Mail title Dear :	Grant	Tutor : Mr T Goodfellow
Year :	1	Nationality : BRITISH
Placement No. :	1	
Session :	2011	
Course :	COMP	
Enrolment Year :	2010	
Graduation Year :		
University email :	20108567@tay.ac.uk	
		Addresses
		Term : Riverside Hostel
		Riverside Drive
		Dundee
		DD5 3LS
		Tel : 01453 286712
		Home : 5 Rosemount Gardens
		Rosemount
		Blairgowrie
		Perthshire
		Tel : 01453 522345

2nd record

As some of the fields in the second record are the same as the first,

use the Copy button  to copy the new record - then modify the student code & other fields, as required.

Note : use [Ctrl][BackSpace] to quickly delete a complete word in a field.

Code :	JAMES_GARY	{Student name details entered automatically on exit from Code field}
Surname, fname :	James, Gary	Placement Required : <input checked="" type="checkbox"/>
Mail Name :	Gary James	Student ID / Ref : 20108453
Mail title Dear :	Gary	Tutor : Mr T Goodfellow
Year :	1	Nationality : BRITISH
Placement No. :	1	
Session :	2011	
Course :	COMP	
Enrolment Year :	2010	
Graduation Year :		
University email :	20108453@tay.ac.uk	
		Addresses
		Term : 23 Perth Road
		Dundee
		Tayside
		DD6 7ST
		Tel : 01382 444123
		Home : 23 Perth Road
		Dundee
		Tayside
		DD6 7ST
		Tel : 01382 444123


Note : All new records are added to the end of the database table. They are ordered alphabetically using the Student Code when you close the Edit window. To check this click on the Close Window button to return to the Main Menu, then re-enter Student Edit mode. The two new student records should now be in alphabetical order.. You may switch to Datasheet view to browse through records at over 20 per screen to locate particular records {as an alternative to using the find Drop-down menu options}.


Tutorial A6 : {Entering Placement Details}

A6.1 Introduction

When entering details of student placements in the PineSoft database you use the “Placements Add” Pop-up form available in the main company database.

A6.2 Objective

You will learn how to use the “Add new placement record” Pop-up  Option in Company forms {User Manual Section 7.4} to enter details for two new placements.

- 1) With the Main Menu displayed click on the “Company” Examine/Edit button and use the “Find” drop-down list to locate and display the Company record for CORMACKTRAINING.
- 2) Click on the “Add new placement record” button .
- 3) Enter the details shown below for the “1st record” to assign Grant Adams to the Job (Ref : COR/11/1) at Cormack Engineering. **Use the Drop-down lists to enter the required values for Student Code, Job Reference and Visiting Tutor.** When prompted, choose to remove the student from the Placement Required list to indicate that further placements are not required at this time.

1st record

Student Code :

{The Studname, Course, Session, Year & Placement fields are entered automatically once the student is selected via the lookup table}

Job Reference :

{The Job Title, company address etc is automatically inserted once the job vacancy is selected via the lookup table}


Start : Finish : Salary :

<u>Supervisor details</u>		<u>Student details</u>	
Name :	<input type="text" value="Dr Peter Hall"/>	Address :	<input type="text"/>
Job Title :	<input type="text" value="MIS Manager"/>		
Title :	<input type="text" value="Peter"/>		
Tel :	<input type="text" value="0148 876311"/>		
Email :	<input type="text" value="PHall@Cormack.co.uk"/>		

Visiting Tutor :

Summary :

Job Details :

- 4) Once the details are complete close the “Add new placement record” pop-up and then use the “Find” drop-down list to locate and display the Company record for DOLANVIDEO.
- 5) Click on the “Add new placement record” button .
- 6) Enter placement details for the second student, Gary James, as shown below.

2nd record

Student Code : **JAMES_GARY**

{The Studname, Course, Session, Year & Placement fields are entered automatically once the student is selected via the lookup table}

Job Reference : **DOL/11/1**

{ The Job Title, company address etc is automatically inserted once the job vacancy is selected via the lookup table }


Start : **30/05/2011** Finish : Salary : **14500**

<u>Supervisor details</u>		<u>Student details</u>	
Name :	Mr John Baker	Address :	
Job Title :	Graphics Manager		
Title :	John		
Tel :	0167 556777		
Email :	JBaker@Dolanvideo.co.uk		

Visiting Tutor : **Mr T Goodfellow**


Summary : **Placement in Graphic Design department**

Job Details :


Close the “Add new placement record” form and then click on the Close Window button  to leave the company form and return to the Main Menu.

To check that the placement details have been correctly entered, use the Main Menu Company & Student Examine/Edit options to browse through the updated company & student records. The above placement details will be present in the appropriate placement Pop-up forms.

At any future time you can easily use the Main Menu “Placements option” or the “Display/Edit

placement details ” pop-up  in company or student forms to re-load required student placement details in order to update/correct the text in the visiting tutor, supervisor, supervisor title, start, finish, salary and comment fields. Why not try this and enter a finish date or some extra comments for the above two students.

To delete complete placement records use the Main Menu “Placements” button to display the Placement Options dialog box and choose the “Examine/Edit Current Placements” option. Click the

delete button  to remove the displayed placement record.

Tutorial A7 : {Using the Group Email Options}

A7.1 Introduction

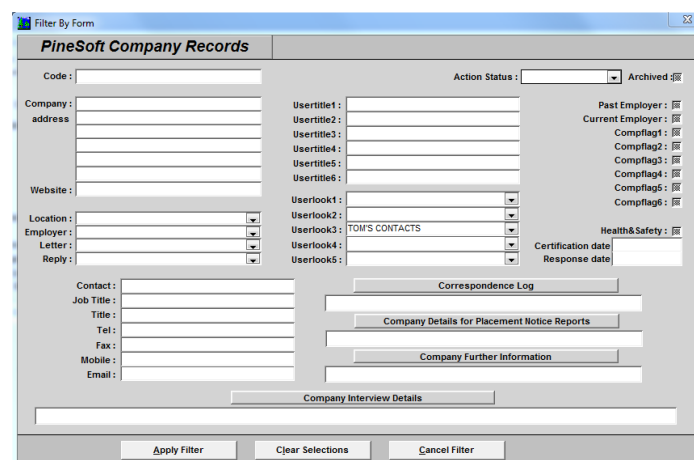
Tom would like to inform his two personal company contacts Alasdair & Dave of his move to Dundee and at the same time send them some literature about the Combined Studies Degree Programme at the University. To do this we will use the “Group Email” option {Available in the Form header of company, student and placement Main Forms}

A7.2 Objective


You will learn how to use the “Group Email Options” to send details to selected companies.

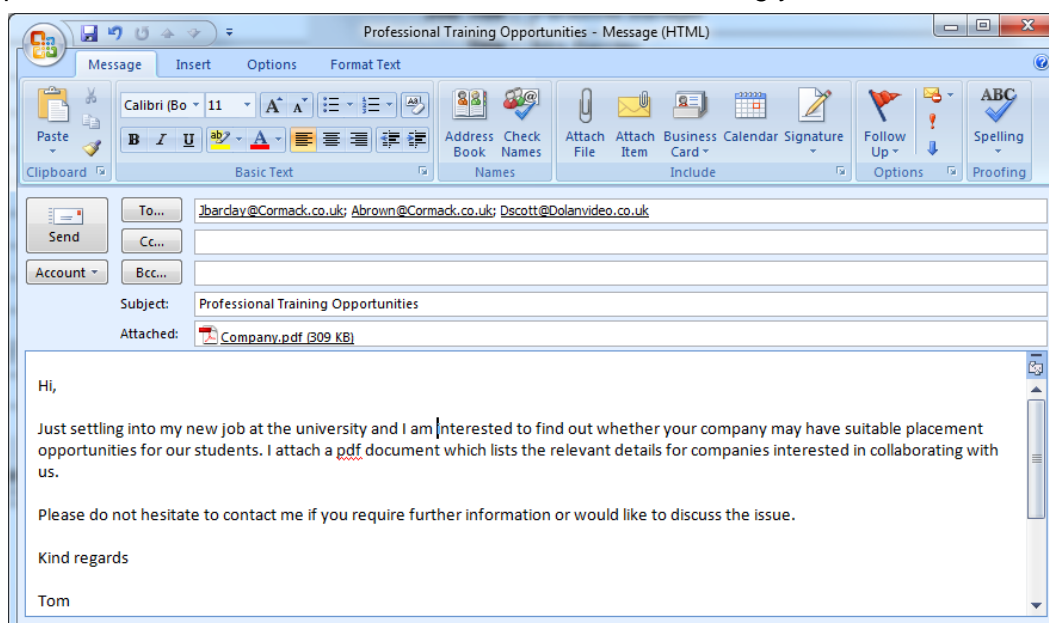
A7.3 Filtering Records to include, then creating Email

- 1) With the Main Menu displayed click on the “Company” button in the “Examine/Edit Data” column to display the Company Edit form displayed in Section 7.1.19 of the User Manual.
- 2) Click on the PineSoft Filter by Form button  and select company records matching "TOM'S CONTACT" as shown below.



Click on the  button to filter the required 3 company records.

- 3) Next click on the  button in the Company Form Header to launch your Email Client then compose & attach documents, as shown below, before sending your email.



Tutorial A8 : {Customised Reports}




A8.1 Introduction

Tom has been designated as “Project Co-ordinator” and he has decided that as most student details are already available within the PineSoft Database he will use it for administrative assistance. To keep in contact with students, and to make sure that he maintains adequate records of instructions or information given to students he has decided to use the “Mail” option - this will ensure that he may send letters to any students at their home or term address or even c/o their company supervisor when on placement. He would also like to be able to produce a class list of students & their project supervisors, and a student proforma listing students & their project supervisors in order to record assessment marks. As there is no mention of “project supervisors” in the PineSoft database and he doesn’t want to enter project supervisors as “personal tutors”, he is not sure how to proceed. How would you tackle this problem? See below for details.

A8.2 Procedure

Creating and printing letters was discussed in Tutorial A3.

You will learn how to use the “Setup Submenu “ options {User Manual Section 5.1} to change the first “student custom prompt” usertitle1 to “Project sup”. You will then use the “Student - Examine/Edit” option to enter some project supervisor names for Computing students and finally produce Class List and Proforma reports.

- 1) With the Main Menu displayed click on the “Setup” button to enter the Setup Submenu.
- 2) Click on the Setup “Prompts” button to enter Edit mode for company & student prompts. Change the first student custom prompt field from usertitle1 to Project sup
- 3) Click on the Close Window button  to return to the Setup Submenu.
- 4) Click on the Close Window  button to return to the Main Menu.
- 5) With the Main Menu displayed click on the “Students” button to enter Edit mode for Student records.
- 6) Place the cursor in the course field and click on the left Quick Sort button  to order the student records by course.
- 7) You will now be at the first of eleven "COMP" student record.


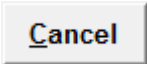
Observe that you now have a prompt “Project sup” - in the "Personal Details" area, however the field is empty. To test the report options you will need to supply some “dummy” data.

Move your cursor to the “proj sup” field and enter any name {e.g. Dr John Smith}.


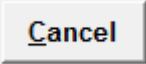
Use your mouse or press [Ctrl][PgDn] to take you to the same field in the next “COMP” record - enter a supervisor name. Repeat this procedure for all “COMP” records, which are at the start of the database following the use of the Quick Sort button.

- 8) Click on the Close Window button  to return to the Main Menu.

Report 1 {Class List Report}

- 1) With the Main Menu displayed click on the “Report List” button in the “Report/Mail Output” column to open the “Choose Required Report” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Select the "Student" report tab, then highlight the Report “Student : Class List + Customs1 field” and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 3) Click on the “Use selection codes” radio button and then OK to display the “Selection Criteria” form illustrated in Section 8.1.2 of the User Manual.
- 4) Click the Course code “COMP” to highlight it and then the “Preview” button to display the required Report.
- 5) Use cursors, [PgDn], etc. or mouse to browse through the displayed report.
- 6) Click on the Close Print Preview button  to cancel the report pre-viewer and return to the Selection Criteria Form.
- 7) Click on the  button to close the Selection Criteria form and return to the Main Menu.

Report 2 {Proforma Report}

- 1) With the Main Menu displayed click on the “Report List” button in the “Report/Mail Output” column to open the “Choose Required Report” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Select the "Student" report tab, then highlight the Report “Proforma4 : Student + Customs1 field” and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 3) Click on the “Use selection codes” radio button and then OK to display the “Selection Criteria” form illustrated in Section 8.1.2 of the User Manual.
- 4) Click the Course code “COMP” to highlight it and then the “Preview” button to display the required Report.
- 5) Use cursors, [PgDn], etc. or mouse to browse through the displayed report.
- 6) Click on the Close Print Preview button  to cancel the report pre-viewer and return to the Selection Criteria Form.
- 7) Click on the  button to close the Selection Criteria form and return to the Main Menu.

Note : As an alternative to using the first custom field to define Project Supervisors you could use one of the options fields which have associated “look-up” tables - you would then need to add the names of All project supervisors to the “student options codes” and use the drop-down lists to enter valid supervisor names. Check the on-line Help for the latest report options.

Tutorial A9 : {Using the Export to Word Options}

A9.1 Introduction

Tom would like to have greater control over font attributes, plus the ability to insert PineSoft database fields at any point of a letter.

A9.2 Procedure

The “export” facilities within the Main Menu - Mail List options make it easy to export PineSoft data to a file in ASCII Delimited (.txt), or Excel format (.xlsx) suitable for use with the Microsoft Word Merge Options, or other Word Processor.

- 1) With the Main Menu displayed click on the “Export List” button in the “Report/Mail Output” column to open the “Choose Required Export Option” dialog box. Highlight the “Export Company data for Word Merge and Group Email” row and click on OK to display the “Choose Individual or Option Codes” dialog box illustrated in Section 8.1.2 of the User Manual.
- 2) Click on the “Select individual records” radio button and then OK to display the “Multi-select List” form illustrated in Section 8.1.2 of the User Manual.
- 3) Use the Multi-select List, explained in Section 8.1.2 of the User Manual, to highlight the records with codes AT&TDUNDEE & CONOCOABERDEEN {Hold down the Ctrl Key to highlight more than one row.} With these two records highlighted click on the “Export(.txt)” button to display an information message - read this and then click on OK to display the “Export to Word Mail Merge File” form. Type the file name merge_comp.txt in the File Name box, then click on 'Open' to export the PineSoft data - an information message is displayed when complete - read this then click on Open.

{NOTE : We recommend the use of merge_comp.txt, merge_stud.txt and merge_placement.txt as file names for the export of company, student and placement PineSoft data. All Word Reports are then based on the appropriate merge file, which can easily be updated by overwriting the existing file to refresh the PineSoft data.}

This completes the preparation for Mail Merge within PineSoft.

To create your mail-merge document you would exit the PineSoft application, load Microsoft Word {or other Word Processor} and use the Mail Merge option {found under the 'Mailings' tab in Microsoft Word} to create a Word Document based on the PineSoft data source.

See the on-line help, Word User Manual or contact PineSoft if you require any assistance in using the powerful Mail Merge options. Also check out the "Learning Centre" on our website at www.pinesoft.findonit.com/learning.php for video demonstrations and pdf documents.

NOTE : *Don't forget that once you have created your Mail Merge document it is very easy to use it again and again for different sets of PineSoft data - simply use the PineSoft Export options and choose to overwrite the existing merge file {merge_comp.txt} to update the document with new data. See the last report in the appendix of the PineSoft User Manual for an example of a report created using the above techniques.*