

## ***PineSoft Professional Training Database***

### ***Version 12.6 - Introduction - Overview***


#### **Loading the Application**

Start > All Programs > PineSoft Demo>PinesoftDemo\_V12\_6

#### **Main Menu Options**

1. Examine/Edit Data
2. Report/Mail Output
3. Setup Options

#### **PineSoft Help**

- Press F1 or click on the  icon for On-line Context Sensitive Help (in Add-Ins)
- Check the PineSoft Website at [www.pinesoft.FinDonIT.com](http://www.pinesoft.FinDonIT.com)
- Email [pinesoft@FinDonIT.com](mailto:pinesoft@FinDonIT.com)

#### **PineSoft User Manual**

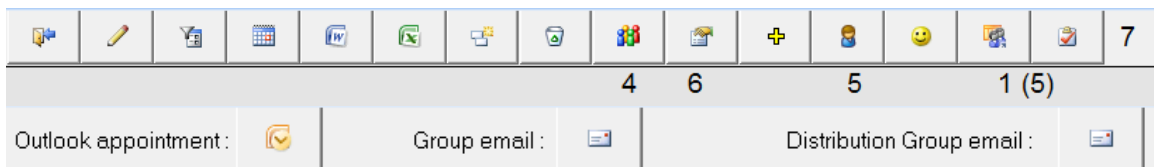
An Adobe Acrobat Electronic version is available on the PineSoft website and gives full details for using the software as well as tutorials to get you started with common tasks.

#### **Important Toolbars, Navigation & Filtering Options**

##### **Quick Access Toolbar (Top Left of Screen - User Manual page 10)**



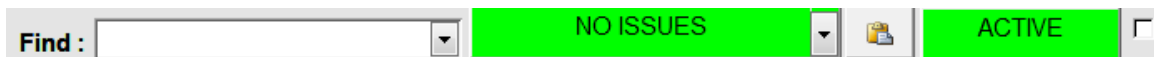
##### **PineSoft Toolbar (Top Left of Window - user Manual page 16)**



##### **Navigation, New Record & Filter Toggle (Bottom Left of Window)**



##### **Finding a Record, Setting "ACTION REQUIRED / NO ISSUES" and Archiving**



## Examining / Editing Data

### Examining Company Data

**Note the two Toolbars :**

**Quick Access Toolbar :** Form / Datasheet view, Cut / Copy / Paste etc.

**PineSoft Toolbar :** Pop-up forms for Extra Contacts, Applications, Student Placements etc.

The easiest way to filter records is to use the PineSoft "Filter by Form" Button




### NOTES

- Data is automatically saved when you move to a new record.
- Use drop-down lists for Location codes etc. You must select a valid entry in the list - you will get an error if you attempt to type an entry which has not been defined. To add or amend entries you must use the Main Menu Setup Options
- Use the find drop-down list to locate a particular record

### Examining Student Data

- The first 8 fields are required and **it is very important** that these fields are entered correctly
- Use surname\_firstname format for easy data entry
- Set the "required" flag for students requiring a placement
- Use the PineSoft Copy button to quickly enter cohorts of students


### Examining and Entering New Job Details

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 IBM/11/1). The Company code and location 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.

As students are placed at a particular job the Number of Vacancies field is reduced by one – once it reaches zero it no longer appears in the list of available jobs for application or placement purposes.

The remaining Job fields are optional and are designed to enable comprehensive details about Application Requirements, Job Classification Criteria and Job Details to be maintained, if required.

## Examining and Entering New Placement Details

New placement details are entered via the Add Placement Pop-up  in Company forms. The Main Menu Placements option may be used to browse through existing placements.

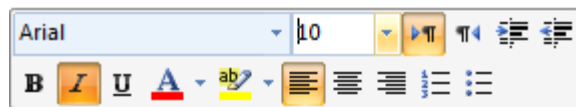
Details of Students and Jobs/Companies are simply picked from a drop-down list with no re-typing.

**NOTE :** In order to add a new Placement Record, the Job, related Company and Student record must have been defined within the database.

## Examining Letter / Memo Data

Create letters and memos within PineSoft for use in the Mail Output Options

**NOTE :** To format the main letter / memo content, highlight the relevant section and



hover to reveal the formatting toolbar.

## Report / Mail Output

- The Report Output Options will produce printed copies (or pdf's to send as email attachments) of company details, student details, placement details etc.
- The in-built Mail Options may be used to print letters, labels and envelopes addressed to company contacts, supervisors, students etc. and **you may maintain an automatic log of all letters sent**
- The Export Options may be used to create Mail Merge files for subsequent use in Microsoft Word – using this option you may produce your own reports and letters in Word - you may also email selected recipients using the Export Options

### **Selection Criteria (Select Individual Records or Use Selection Codes)**

You may generally choose records to print by selecting individual records at random (highlight the first record required, then hold down the Ctrl key while you mark additional records.)

or using Selection Codes such as Session, Course, Location as appropriate.

### **Setup Submenu Options**

- Define codes for all drop-down lists, i.e. location, nationality, visiting tutor etc.
- Add /define Course Titles
- Define user-definable field prompts
- Set the default Edit / Window format etc. These apply to the current PC only, so different users can use different settings. Some users may prefer the Auto-scaled display of forms, others the centred window display etc.
- New Session Options – use at the start of a New Placement Year
- Web Defaults - these are used, by the Placement Manager, in the Enterprise Version to control the level of access to the main database by students, visiting tutors & admin users.

### **Creating pdf files for Email use**

Adobe Acrobat pdf files are often used to distribute documents, manuals etc. and can be used to send any PineSoft Reports or Letters as an Email attachment.

It is easy to create pdf versions of any PineSoft Report or Letter from within the PineSoft application.

The following Placement Report document was created in the above way.

**NOTE :** The PineSoft Website at [www.pinesoft.FinDonIT.com](http://www.pinesoft.FinDonIT.com) uses pdf format for User Manuals, Newsletters and etc.

