RMRVactrac
Employee Leave Tracker

(for Symbian OS Series 80
– Nokia Communicator 9210/9210i/9290 and 9500/9300)

User Guide

Contents

RMRVactrac: Quick start

RMRVactrac, 'Vacation Manager' is designed to allow you to keep track of you or your employee's work leave (e.g. vacations, sickness, maternity).

People

Multiple people can be entered. Each person is defined by their first name, last name, department, phone number and optional information field. These details can be used for sorting and filtering purposes.

Leave

Each person's leave is assigned to a category (e.g. vacation, sickness, maternity). A leave has a duration (from, to) that will be used for category accounting calculations. Additionally a leave can optionally have a description note.

There are other special kinds of leave (e.g. public or company holidays) that can be entered to apply to all people. These have no category assigned and don't have to be used in the accounting.

Category

Each leave category has a text label (e.g. Vacation) and a symbol (e.g. V). You can set a category to auto count the leave days, and optionally to count workdays only and to skip the public holidays.

Accounting

Accounting is done on a period basis. A period is a duration of one year, which does not necessarily need to start on a calendar year boundary (e.g. fiscal year in some countries, 1-Oct-1997 - 30-Sep-1998, business year). You enter an initial entitlement value for each period and the program will calculate the balance for each category for this period. Balances of a period will be added to the start value of the next period if carry forward is switched on.

Date screen display

This screen shows a list of the people and their leave entries for a 4 week-period. The program starts up with 'Today' roughly in the middle of the period, shown as a shaded bar coloured according to the setting in **View Preferences**.

Non-working (weekend) days are also shown as shaded bars, again using a colour defined by the setting in **View Preferences**.

Any Public Holidays (when defined) will also be shown as shaded bars, again using a colour defined by the setting in **View Preferences**.

Each leave entry is shown graphically using a colour as defined by the category and a label also defined by the category and by the setting in **View > Leave** label.

The displayed dates can be changed using the cursor keys or the joystick.

All operations on Files, People, Leave, Public Holidays and Categories are carried out through the Menu options or appropriate hot-keys. See separate Help topics for each option.

Category screen display

This screen shows a list of the people and summaries of their leave entries for the current annual period as show in the Title bar. The program starts up in the current period and shows the Leave status for the first 3 categories. The other categories can be seen by scrolling right using the cursor keys or the joystick.

The program defaults to a current period of 1 Jan to 31 Dec of the current year. If you wish to use a different period change the start date to another day/month (example 1 April) in **General Preferences**.

The CBA buttons can be used to look at the summaries for **Next Year** or **Previous Year**.

All operations on Files, People, Leave, Public Holidays and Categories are carried out through the Menu options or appropriate hot-keys. See separate Help topics for each option.

Moving around

Use the following keys to move around dates and categories:

- **Up/Down arrow** keys to select entries.
- **Shift Up/Dn (Pg Up/Down)** to move a screen at a time.
- **Ctrl Up/Down (Home/End)** to go to the top or bottom entry in the file.
- **Ctrl+Q** to Switch view between the Dates screen and the Category screen.

In Dates screen:

- **L/R arrow** keys to move forwards or backwards a week at a time.
- **Ctrl+L/R** to move forwards or backwards a month at a time.

- **Ctrl+J** or **Go To > Date** or 3rd CBA button jumps to a specific date.

- **Space bar** or **Shift+Ctrl+J** or **Go To > Today** to return to 'today'.

And in Category screen:

- **L/R arrow** keys to move L/R through the categories.

- **Next** and **Prev** (2nd and 3rd CBA buttons in Categories screen) allow you to switch annual periods.

- **Ctrl+B** or **Space Bar** returns you to the current period.

Note: The joystick/navigation button can also be used instead of the arrow keys.

File Handling

The **File** menu gives the options for maintaining a number of different VacTrac files (maybe for multiple companies):

- **Create file.** This builds a new file with no people entered.

- **Open file**. This switches between files if you have more than one.

- **More > Rename file**. To change the name of the current file.

- **More > Delete file**. Deletes a file if no longer required (you cannot delete the current open file).

Under **More >** there are also options to **Backup** and **Restore** data. These are covered under different Help topics.

Managing People

Use the options in the **People** menu to define the personnel for recording leave. Use **Add** and complete the following details:

- **First name** and **Last Name**

- **Department**

- **Phone**

- **Information**

The personal details can subsequently be **Updated** or **Deleted**.

If you wish to change the order of the names in the display, use the **Move** option and specify the new line position.

Finally, the person's details are available for quick view with the **Details** option.
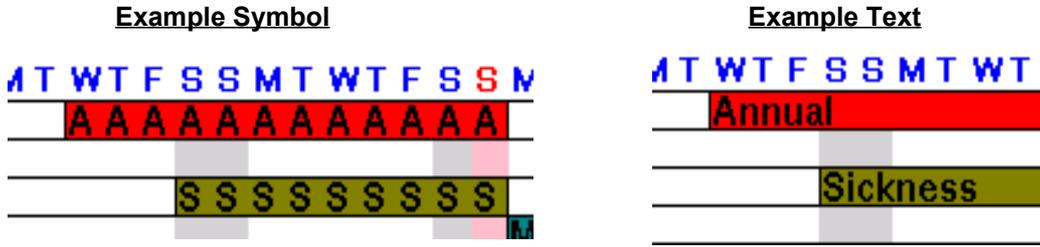
Managing Leave Entries

Use the options in the **Leave** menu to record leave dates as they occur for individual people. Use **Add,** the 2nd CBA button, or simply the **Enter** key, and complete the following details:

- **From** and **To** dates of the leave period.

- **Category** (see separate Help topic for defining Categories).

- **Notes** for any optional text.

The leave will then be displayed in the Dates screen using the colour defined by the selected Category and with text showing depending on the **View > Leave Label** selection. This defaults to the **Symbol**.

Example Symbol   **Example Text**

Entries can subsequently be **Updated** or `Tab` key, or **Deleted** or `Del` key.

If more than one leave period is shown on the screen (or you are using the options from within the Category screen) then a drop down menu is displayed so you can select which leave period to action.

Public Holidays

As many Companies do not count Public Holidays as part of the annual vacation allocation it is important that these holidays are shown and taken into account in calculations.

To add a Public Holiday use the **Public holiday > Add** from the **Leave** menu and complete the following details:

- **Date** of the holiday

- **Description** of the holiday (for information only)

- **Symbol** to be shown on the screen

- **Repeat annually** to differentiate between regular holidays and one-off holidays.

The holidays will be shown on the screen in the colour defined for Public Holidays in **View preferences** (and see separate Colour Picker Help topic), and apply to all people.

For each Category (see separate Help topic) you will specify if Public Holidays should be taken into account during calculations in the Category screen.

Use the **Public Holiday > Delete** from the **Leave** menu to delete a Public holiday from screen.

Purging entries

Although a large number of entries can be stored, it is good practice to regularly purge old entries. The files will be compacted at the same time to improve performance.

Use **Purge old entries** from the **Leave** menu, and specify the date before which all entries are removed.

Using categories

The program uses categories to differentiate between types of holiday/vacation or sick leave. There are 4 pre-defined leave categories: **Annual**, **Sickness**, **Maternity** and **Paternity**. You can then add additional categories as required (example for Training or National Service). Use **Add** from the **Category** menu, and complete the following details:

- **Label**. Used to describe the Category and will also be shown on screen if the appropriate option is selected on the **View > Leave label** menu option.

- **Symbol**. This is a single character to be shown on screen if the appropriate option is selected on the **View > Leave label** menu option.

- **Default start value.** This specifies the number of days that an individual is given at the start of a period. For example, many Companies offer employees 30 days Annual leave.

- **Work days only**. This option specifies if non-working days (as defined in Control Panel) should be excluded from calculations of leave balances.

- **Skip public holidays**. This option specifies if Public Holidays should be excluded from calculations of leave balances.

- **Carry forward (CF)**. This option defines if employees are allowed to carry forward any unused days of their allowance into the next annual period.

- **Maximum CF value**. Assuming Carry forward is allowed, this allows you to specify the maximum number of days allowed.

Colours (3rd CBA Button) allows you to specify the colour for the category (see separate Colour Picker Help topic).

Categories can be **Updated** or **Deleted**.

In the Categories screen there are additional commands in the **Category** menu. **Move** allows the category columns to be reordered horizontally.

Modify initial entitlement changes an individual's start value because of special circumstances. There is also an option to do that globally across all people.

Other functions

Filtering entries

Use the **Filter** option from the **Tools** menu to activate a filter. Simply enter the search text string.

The display will then show only those people whose details (First name, Last name, Department, Phone and Information) contain the search string.

A filtered display will have an "**(F)**" in the Name column title. Press <Esc> to cancel the filter.

Export report

Use **Data > Export report** to export the full details of leave entries as an ascii text file in Tab delimited or CSV (Comma Separated Variable) formats. This can then be copied from your communicator for use in other PC programs, or used within the built-in applications.

Import the text file into a Word file, select all the text, then use 'Copy & Paste' functions to transfer them into a Sheet file for further manipulation.

Note that the data exported is for the people shown on the screen and the selected period. If you wish to limit the people to, for example, one department, then use the **Filter** option (see separate Help topic) to limit the people shown. If you wish to export a different period then ensure that period is displayed first.

Memopad

The **Memopad** feature in the **View** menu allows you to keep any notes about people or their leave.

Password

Individual files can be Password protected. Use the **Password** option in the **File** menu:

- Turn the **Password set** to On.
- Enter the character string in the **New password** field and repeat it in the **Confirm password** field.

Passwords are case sensitive.

When a password is set you will be asked to enter the code when starting the program or when switching to the file from an unprotected file.
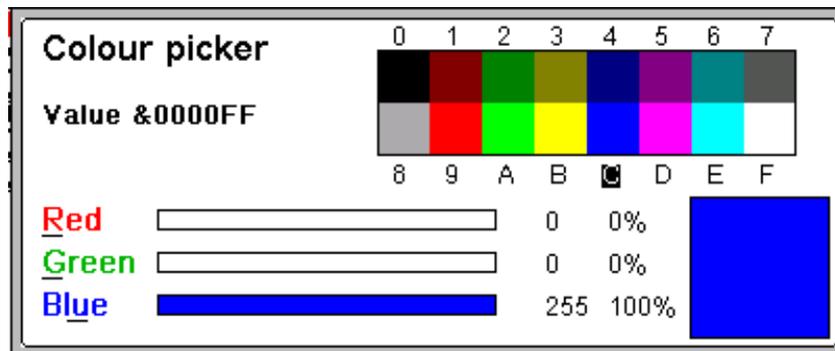
To remove a password use the **Password** option again:

- Enter the current **Password** to gain access.
- Leave **Password set** to Off.
- Leave the **New password** field and **Confirm** fields blank.

Colour picker

When defining Categories, or specifying colours for various aspects of the display, within **View preferences**, the RMR Colour picker is used.

- The 16 basic colours can be selected by using the `0-9` & `A-F` keys.

- More subtle colours can obtained by selecting **Red (Ctrl+R)**, **Green (Ctrl+G)** or **Blue (Ctrl+U)** (or use cursor key/joystick to select them) and then the L/R arrows to increase/decrease hue. The `Shift` key modifier will change increments more rapidly, and the `Ctrl` key modifier takes the setting to 0% or 100%.

- The **Value** CBA button allows you to specify the colour manually by absolute 0-255 RGB values.

- The **Initial** CBA button reverts to the original default colour.

Backup and Restore

Under the **Data** menu there are **Backup data** and **Restore data** options.

Backup data *Shift+Ctrl+B* allows you to manually keep a copy of your data elsewhere on the system for security. The set of backed up data files is stored in the: Communicator:\My Files\RMR\Backups\RMRCar\ folder on the 9300/9500, or Communicator:\System\Apps\RMRCar\Backup\ on 9210/9290.

Use the **Backup** options in **General preferences** to enable regular automatic backups of your data, or to change the location of the backed up files.

If necessary use **Restore data** *Shift+Ctrl+R* to restore all datafiles in the case of data loss.

Note: All current data in the program will be overwritten by restoring the backed up data.

Configuring the program

View preferences has some basic options for configuring the display. The following can be set:

- **Font**. To Arial or Times Roman.

- **Date format**. Gives a choice of various international date formats.

- **Name column width**. Allows you to define the width of the people name column.

- **Display**. Gives a choice of displaying first name only, last name or both.

- **Info window**. Gives a choice of narrow or wide for the Info window.

For **Colours** (3rd CBA button), this opens a separate dialog where the colours can be specified for the header days and dates, Today, Public Holidays, and non-working days. Accessing these will invoke the Colour Picker (see the separate Help topic).

General preferences has other options for configuring the operation of the program. The following can be set:

- Start Day and Month. The program defaults to 1st Jan for the start of the annual accounting period. These allow you to select another date if your Company uses a different period.

For **Backup** (3rd CBA button):

- **Auto**. Select if you want a backup to be automatically carried out, and if so, how often.

- **Start Date**. When you want the autobackup to start.

- **Prompt**. Whether you want to be prompted for the backup.

- **Location** (Command Button). The location of the backup files can be changed from the default.

In the **View** menu there are also options for **Switch title** to remove the screen title, and **Full screen** to remove the information and button bars for more screen space. Four sizes of text are available with the **Zoom** option.

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