Staff Files®

TIPS & TRICKS

Downloading the Staff Files demo was your first step to managing employee information with ease. You'll soon discover how quickly you can access and update employee records, view reports, and more! To help you optimize the Staff Files features, read this Tips & Tricks guide.

How do I...

Get started?	**Here's how:** Open Staff Files. If you want to view the sample database select Sample Data. To begin with a blank database and enter your own employee information, select Live Data. In the main screen select Define from the menu bar and define all the customized settings for your business such as accounts, categories, reminders, and passwords. Then start entering employee information.
Get employee records into Staff Files?	You can manually enter employee records or import them from QuickBooks® Pro or Premier 2003 or higher or Enterprise Solutions 2.0 or higher. We can also import existing data into your Staff Files database. Call 1-800-874-8801 for an estimate. **Here's how** to import from QuickBooks: Open your QuickBooks company file. In Staff Files select File > Import from QuickBooks > Yes, Always > Check the box to allow application to access personal data > Continue > Yes > Yes to import from the currently open file.
Limit access to Staff Files?	Multiple people can access Staff Files with a Multi-User license. You can restrict access to one or more tabs by creating a User Password for each person. **Here's how:** Select Define > Passwords > User Password tab > Add > Enter the User Password > OK > Select the tabs you want the user to access > Close.
Protect my database?	The Database Password gives you additional security to protect confidential records. **Here's how:** Select Define > Passwords > Database Password tab > Enter the Database Password > Close.
Edit field labels?	For added flexibility you can customize fields in Staff Files to meet your business needs. For example, you may want to change the Department label that appears in the General tab to "Division" or "Regional Office." **Here's how:** Double click on a field label > Rename the label in the Label Edit window > OK.
Move to the next field?	Instead of clicking each field with your mouse, move through Staff Files using your keyboard. **Here's how:** Enter information in one field > Select the Tab key on your keyboard to move to the next field.
Backup the database?	You should always keep a backup copy of your employee records in case the files become unusable due to a computer problem. **Here's how:** Use the Backup Reminder feature to remind you when to backup your database. Set the reminder by going to Define > Backup Reminder > Select the Enable Backup Reminder checkbox > Select the number of days to display > OK. Backup your database by going to File > Backup > Use the Browse function to select the database backup location > OK.
Create a sort?	You have the flexibility of setting the order that employee names appear in the employee selection lists and on reports by creating customized sorts. **Here's how:** Select Define > Sorts > New > Enter sort name > In the Sort Field 1 column select the Sort Field you want to use as your primary field > In the same column select the Sort Order: Ascending or Descending > Continue defining up to five additional sort fields in the remaining columns if needed > OK > OK.
Create a filter?	To further customize Staff Files to meet your needs you have the option of creating your own filters to increase reporting capabilities. For example, you can filter your staff by Position and include only people with the position "Manager" in your report. **Here's how:** Select Define > Filters > New > Enter filter name > Select an information field from the fields list box on the left (in this example you'd select Position) > Insert Field > Select an operator from the list of operators on the right (in this example you'd select =) > Insert Operator > Enter the Variable Data after the Operator in the Filter text box. Place quote marks around the variable text (in this example you'd type "Manager") > Test Filter > OK > OK.

TIPS & TRICKS *(continued)*

Create auto accruals in the Accruals tab?	The Accruals tab lets you track leave and time accrued. The Auto Accruals feature will automatically add time to employee accrual accounts based on the formula you provide. For example, Staff Files can add 4 hours of vacation time to employee vacation accounts with each pay period occurring every two weeks. You can enter Auto Accruals information anytime. Typically, you will want to enter this information before entering any time taken. **Here's how:** In the Auto Accruals section of the Accruals tab, indicate a Start Date to begin adding accruals > Enter a note > The Num and Units columns are the frequency, so in the above example, enter 2 in the Num column and select Week(s) from the drop-down in the Units column (this represents every 2 weeks) > The Accrual column contains the amount of time accrued, so in this example, enter 4 (representing 4 hours accrued every 2 weeks) > Press the Tab key when finished and the Balance field will update automatically.
Enter reminders in the Reminders tab?	Staff Files automatically reminds you of important dates such as upcoming evaluations, I-9 renewals, anniversaries, benefits eligibility, and birthdays, but you can also create your own reminders in the Reminders tab. **Here's how:** Double-click a blank row in the Date column > Type in the date of the reminder, or use the up and down arrows > Tab to the Memo column and enter your reminder text. Note: Review your reminder settings under Define > Reminder Settings to ensure you have all reminders turned on and selected the correct number of days in advance to display. To view a complete list of reminders go to View > Current Reminders.
Customize the User tab?	The User tab gives you an area to create customized fields for entering miscellaneous employee information. You can create filters based on the data entered in the 10 customized fields. **Here's how:** Type a title in the left column for the fields you will enter > Tab to the description field and enter the employee's information.
Link documents in the Documents tab?	Use the Documents tab to link and view important documentation or images. **Here's how:** Scan documents using your scanning software and save to the IMG folder located in the same folder as your Staff Files database. Select the Add button in the Documents tab > Enter the document title in the Document Title text box > Browse > Select the document in the IMG folder > Open > OK. Note: To activate or deactivate the preview window to display a reduced image of the linked documents go to View > Document Preview. Only file types .jpg and .bmp are displayed in the preview pane. To preview other file types click on the View button.
Create or edit a letter?	Quickly prepare employee correspondence with 34 pre-written HR letter templates. Or create and customize your own letters populated by various fields from your Staff Files database. **Here's how:** Tools > Letters > Create/Edit Letter > Select button to create new or edit > Name the document > Select the Create Letter or Edit Letter button > Customize your letter with options from the SF Letter Field dropdown > Save. To publish letters go to Tools > Letters > Publish Letter > Select the letter to publish > Select letter recipients > Publish Letter > Microsoft® Word will open with the published letters > Print or save the file for later use.
Hide employees?	Instead of deleting an employee record you can simply hide the employee in Staff Files. This feature lets you retain all employee records while leaving employees of a particular Status type (Terminated, Inactive, etc.) out of your reports. **Here's how:** Define > Status > Double-click the Hide checkbox next to the Status you want to hide > Close.
Edit and customize reports?	Because Staff Files uses a Microsoft Access database, you can create your own customized reports and add them to Staff Files using Microsoft Access 97, 2000 or 2003, other report-writing software such as Crystal Reports®, or export any of the existing reports to PDF, RTF, Tab delimited, or Excel files. **Here's how:** Select the report you want > Select your employees > Print Preview > In the Report Preview window select the file format you want to export > Select the location to save it > Name the file > Save.

Didn't see your question on the list? We are happy to help. Please call us at 1-800-874-8801, e-mail us at sales@abs-usa.com, or review Help > Contents within Staff Files for answers to your questions.