



Preface:

TimeKeeper - PC is a full-featured OLE 2.0 client. This means that you can export your TimeKeeper-PC data to Microsoft Word and receive documents (letters) containing data extracted from TK5.

The possible uses for this feature are vast (since it allows almost any TK5 data to be placed in a standard Word document). One common example is the distribution of letters to the company’s employees, specifying each employee’s vacation allowance, utilization and balance.

Introduction:

To define a TK5 to Word interface, two templates need to be defined:

1. A word template (*.DOT) containing the following items:
 - Field names – user defined field names (or variables) that will serve as “place holders” for data received from TK5.
 - Free text that should appear in the document.
2. A TK5 template containing the following specifications:
 - Link to the Word template.
 - Data to be placed in the designated Word field names (variable names).
 - Other relevant specifications (data format, range of dates etc).

In order to define these templates, two possible setup modes are available:

1. A two-phase setup process – in which the user first defines the word template, and then defines the TK5 template (and thus connects it to the Word template). In this mode the setup is conducted in two separate independent steps.
2. A one-phase setup process – in which the user defines the TK5 template and through it creates the Word template.

Throughout this document the more complex one phase setup mode will be reviewed, since by understanding it, the simpler two-phase setup mode can be easily deduced.

Main: setup and operation procedure -

The initial Word interface screen has three active buttons:

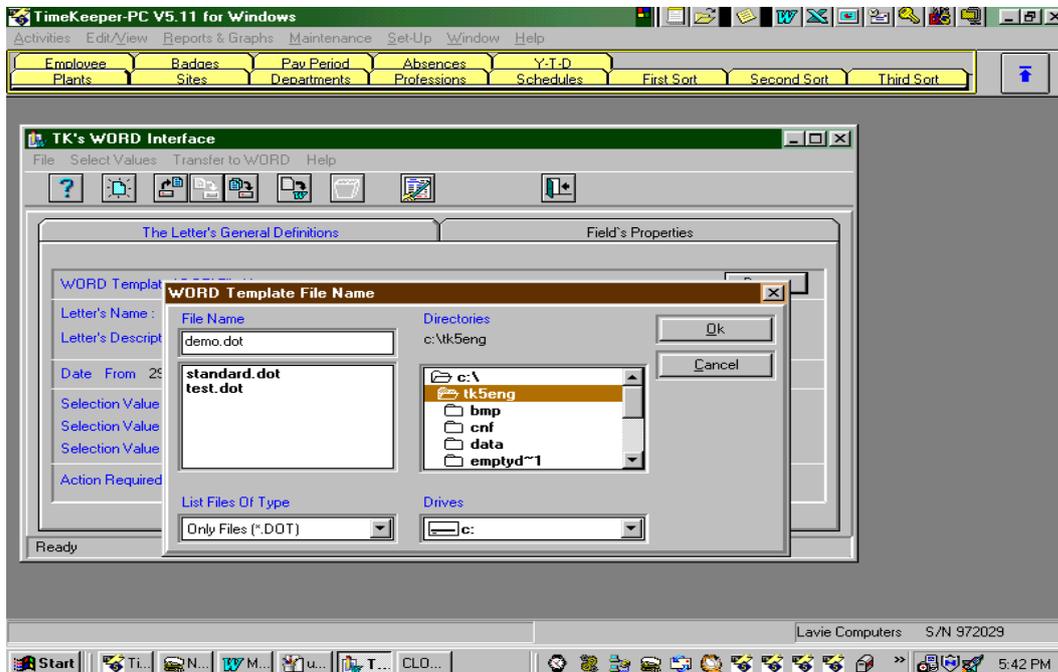
	Create new TK5 template.
	Load previously saved TK5 template.
	Exit program.

After clicking the “new template” button a file selection box will appear. Here the user can select one of the two setup modes –

- If the Word template has already been defined, all the user needs to do is select the relevant *.DOT file and the program will extract the field names from it to the TK5 template.



- If the required Word template has not been previously created, the user needs to enter a new (*.DOT) file name in the file selection box (see Pic.1).



Pic.1

Throughout the setup process, the Word interface provides three work modes (available in the “Action Required” drop box) – Edit Template, Letter Preview and Print Letter.

Each of these work modes is required throughout the setup process. Each also effects the “Field properties” tab’s display and operation.

In order to complete the TK5 to Word interface (in one phase setup mode) the following steps need to be taken:

1. In “Edit Template” work mode –
 - Define the field names and descriptions.
 - Transfer these field names to a Word template.
2. In Word –
 - Add free text to the Word template (and position the field names throughout the document).
 - Save the Word template.
3. In “Letter Preview” work mode – link each field name to a data item in TK5.
4. Save the TK5 template.

➤ Defining the field names:



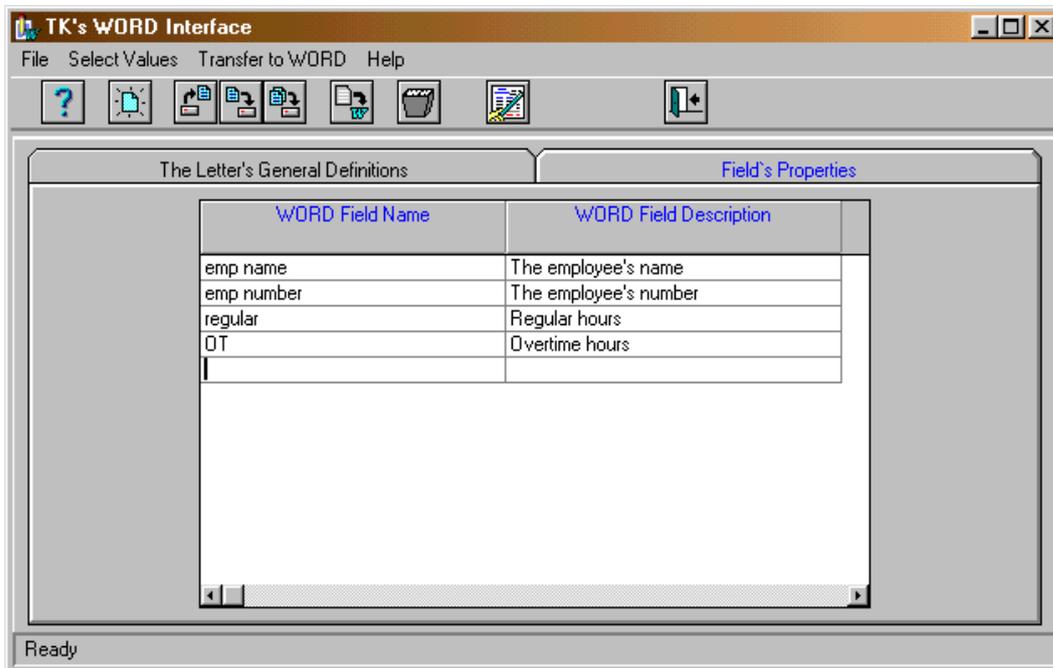
Immediately after a new DOT name has been entered in the file selection box, a message will appear asking “Get New fields from Word Template?” Since no Word template has been created yet, the user should select “No”.

Afterwards the following definitions need to be entered:

In the “Field Properties” tab-

- Word field name – user defined field names that will hold data extracted from TK5. Note that the assigned names are strictly at the user’s discretion.
- Word field description – a short description of the field purpose.

For example – a field name called “emp name” with a description “the employee’s name”, (see Pic.2)



Pic.2



Transferring field names to the Word template:

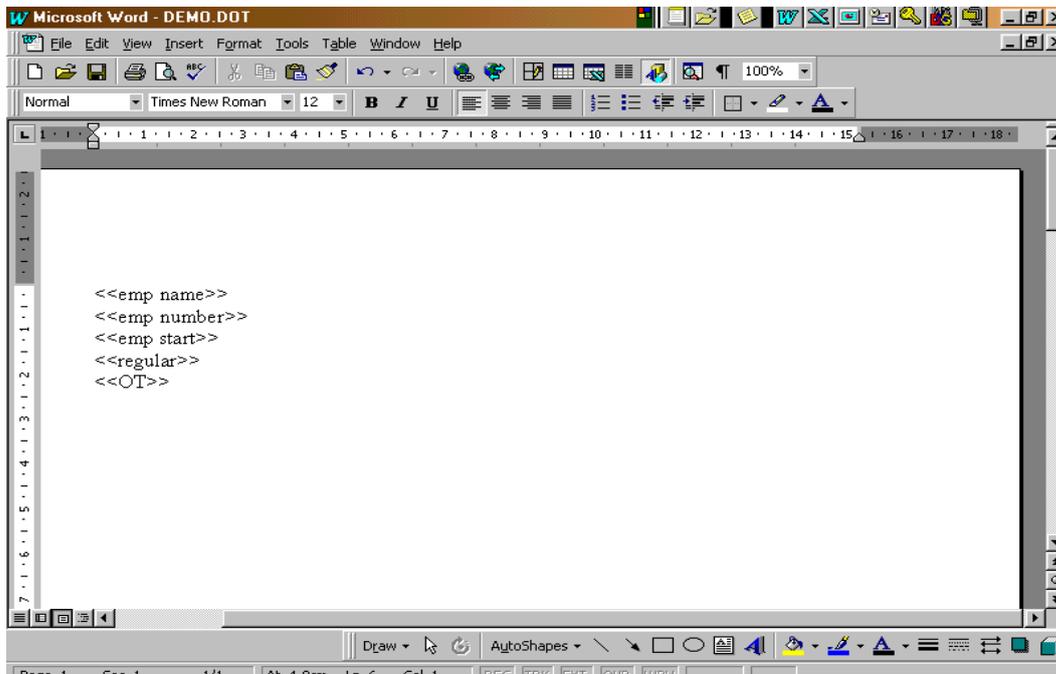
Transfer of the newly created field names to Word is accomplished by clicking the button (while in “Edit Template” work mode).



TK5 will then perform the following steps automatically (i.e. these do not have to be performed by the user):

1. Load Word.
2. Create the new document template (DEMO.DOT in the current example – see Pic.1).
3. Insert the field names into the document template. These will appear in double arrowheads (for example – the field name “emp name” will be transferred to Word as <<emp name>>).

For further assistance please refer to Pic.3 – it represents the Word template’s appearance after the transfer of field names from TK5 to Word was complete.

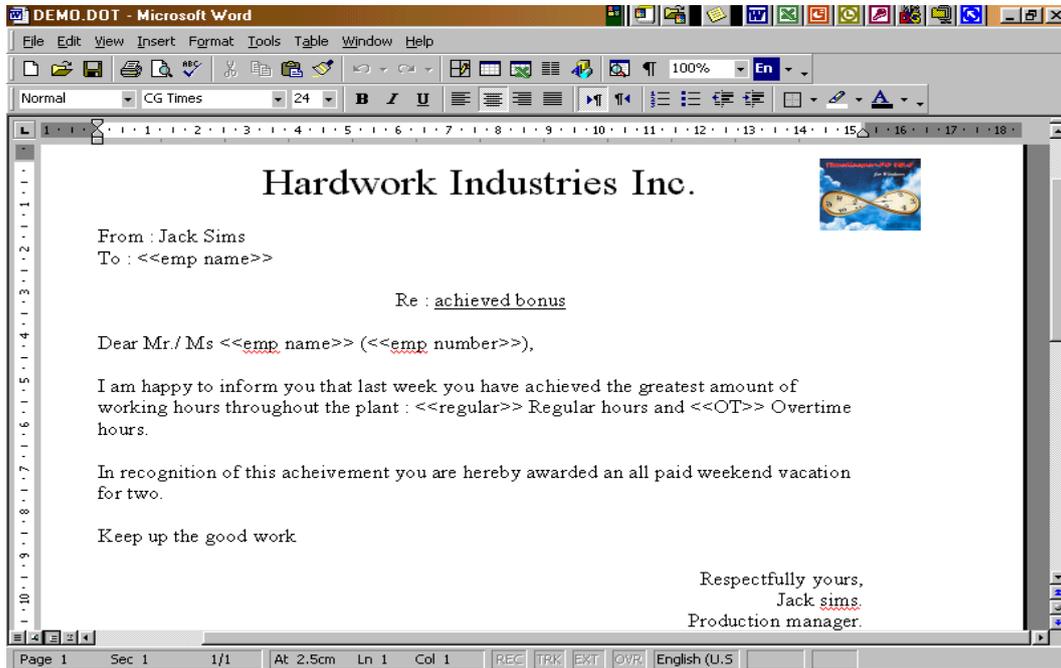


Pic.3

➤ Word template modification:

Afterwards, the user can freely add all the relevant free text that needs to appear in the final document (just like comprising a standard document).

The field names should be positioned throughout the document based on the user’s requirements.



Pic.4

For further assistance please refer to Pic.4 which represents (an example of) a Word template after free text was added to it. This will be the final shape of the Word template.

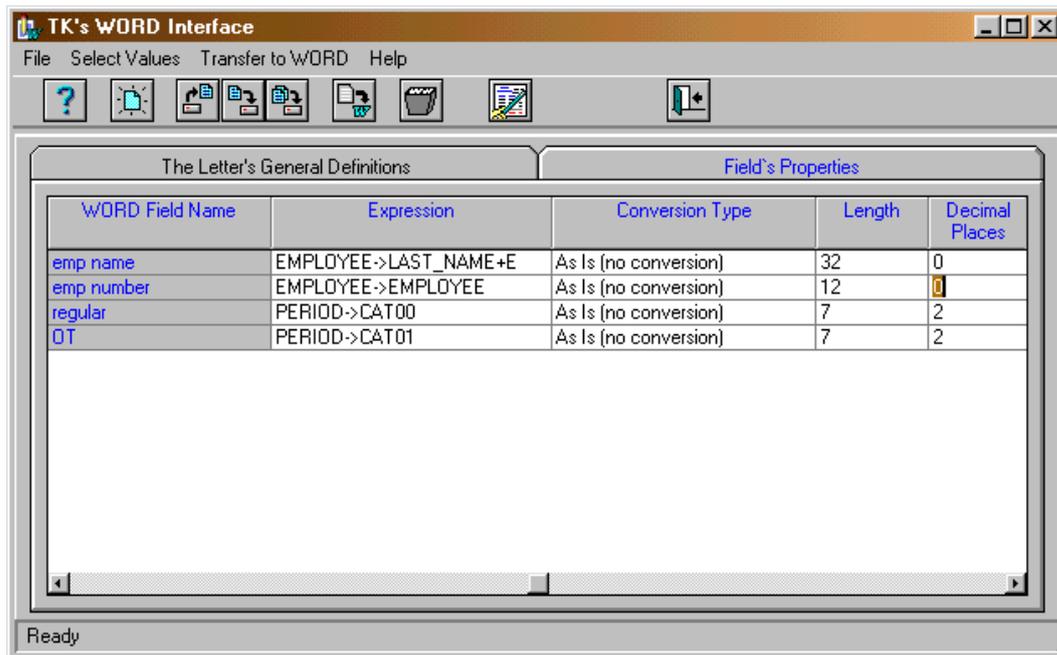
After the Word template has reached its final shape (based on the user's requirements) the document template should be saved (by clicking the save button in the Word processor).

- **TK5 template modification:** Link of each field name to actual TK5 data, additional settings and saving of TK5 template.

The final stage in the interface definition process is linking each field name to actual data located within TK5 (For example linking the "emp name" field name to the "EMPLOYEE->LAST_NAME" expression).

The following steps should be performed:

1. Change the work mode to "Letter Preview" – this will effect the "Field's Properties" tab look and operation mode.
2. Assign each field name in the "Field's Properties" tab the proper TK5 expression (in the "Expression" column – see Pic.5).



Pic.5

The rest of the columns in the “Field Properties” tab are mandatory. These are:

1. Date Validation Mode – can be Selected Date, Range of Dates, Fr/To Pay-Period or Fr/To Year (and is set automatically according to the value that was selected). It is not recommended that these settings be changed.
2. Absence Code – In cases where data is extracted from the ABSFOLLOW or ABSTRX data files (the absence tracking files), the relevant absence code should be selected here.
3. Values for additional selection – Enable “filtering” the documents being generated, based on validity-range rules (i.e. Minimum and Maximum). The user can assign each field name (variable) a value type and a valid value range. Specific details are available for Lavie’s Technical Support Department.
4. Conversion type – each data item can be converted to a different format (this applies only to HH:MM data items).
5. Length – the field’s length, this is set automatically but can be overridden by the user.
6. Alignment – sets the alignment of the field in the Word processor (left, right or center).

To complete the setup process the TK5 template should be saved using the Save() or Save As  () buttons.



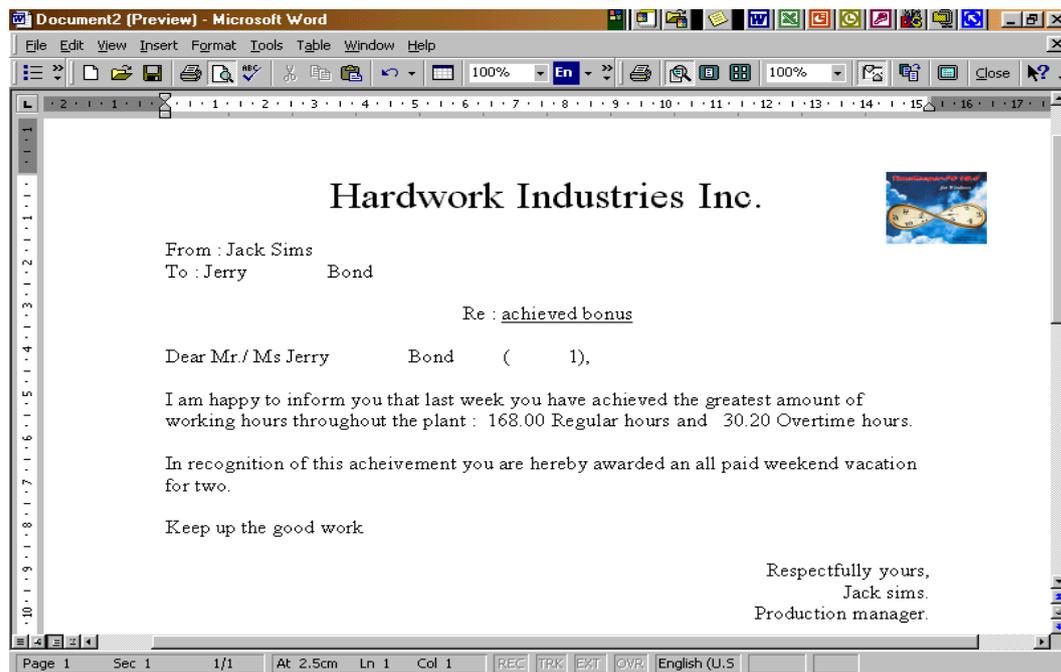
Standard operation - query, print and preview options -

To activate the interface, the user needs to define the following selection parameters:

1. Date range – available in “The letter’s general definitions” tab, please note that the date validation methods (date to date, pay periods, yearly etc) are set automatically by the program. These can be changed through the “Select Values” menu, but it is not recommended.
2. Query selection – available through the “Query Selection” button. Here additional selections can be defined (selection of employees, plants, sites, departments etc).

Afterwards, the interface can be run in two possible modes –

- Preview Mode - Set the work mode to “Letter Preview” and click the “Transfer to WORD”  button (): the program will display the first letter to be printed in the Word processor (in Word’s print preview mode), for example see Pic.6.
- Print Mode - Set the work mode to “Print Letter” and click the “Transfer to WORD” button: the program will print all the letters.



Pic.6



Additional information:

- **IMPORTANT** – please make sure that no other word documents are open when you are transferring data from TK5 to Word.

If any Word document is opened during the transfer, the user may risk loss of any unsaved data in that document.

- Letter's description box (optional) – holds a short description of the letter's purpose.
- Additional selections – contain advanced selection definitions which are beyond the scope of this document. For more information please contact Lavie's International Tech Support.
- It is highly recommended that after the transfer of data to Word is complete (in "Letter Preview" mode) that the TK5 interface be closed prior to Word (meaning that the preview document should be closed only after TK5's Word interface has been closed).
- In reference to the two-phase setup mode: in this mode the Word document template should be prepared first (including all the required field names in double arrowheads). Later on, when the new TK5 template is created, the Word template should be selected (in the file selection box). Consequently all the field names would be extracted into TK5.