

TREND User Manual

What is TREND?

Tracking Realistic Expectations, Needs, and Directions (TREND) is a flexible productivity tool developed for use by Headquarters, Branch and Data Center managers and employees. This application allows personnel to perform long and short term planning, assist in work assignment, evaluate performance, and report quality and performance results.

Each user in TREND is assigned a specific role (security level). The role assigned determines which modules a user can access, the functions they can perform and for whom, and the reports they can create. For example, you may be assigned a manager role that allows access to the worksheets for the employees in your area. Or if you are only responsible for your own worksheets, you may only need to be assigned to the Employee role.

This manual provides worksite managers, supervisors and employees step-by step instructions for using TREND.

Features

TREND includes the following features:

- Automated nightly import of data from WIP, which results in decreased data entry for employees.
- Ability to create visual reports that allow for flexible date ranges and functional areas.
- Access and view capability based on the user's assigned role.
- Quick login of total daily hours directly from the TREND Application Login window.
- User Preference options for setting defaults and direct access to worksheets.

Questions or Problems

If you have any questions or problems regarding the TREND application, call the Help Desk, 1-800-421-9378, Monday – Friday, 8:00 a.m. to 6:30 p.m.

Getting Started

Logging On

The first time you log on, you will be given a default password to use and will be prompted to change the password. You must change the password to access TREND. For more information, see *Passwords* later in this section.

If you primarily access the Worksheet Entry module, you can set your user preferences to Employee Mode so that this module will automatically open when you log on. For more information, see User Preferences in the *Using the Worksheet Entry* section.

To log on:



1. Double-click the TREND icon on the Windows desktop. The Login window is displayed.
2. Type your five-character User ID in the User ID box, if it is not already displayed.
3. Type your password in the Password box

Note: The first time you log on, you are required to change your password. For more information, see Passwords later in this section.

4. Click OK.

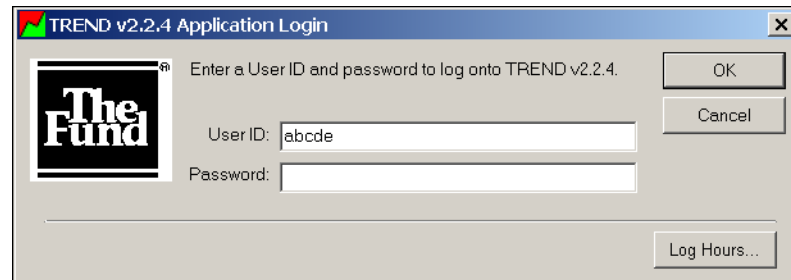
To log out:

Do one of the following:

- Click the X in the upper right corner of the main TREND window.
- Select File, then Exit from the menu bar.

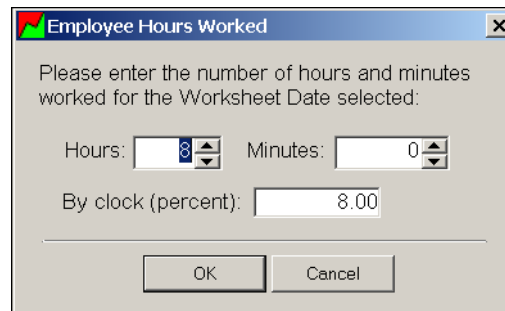
To log daily hours without opening a worksheet:

1. Double-click the TREND icon on the Windows desktop. The Logon window is displayed.



2. Type your five-character User ID in the User ID box, if it is not already displayed.
3. Type your password in the Password box.
4. Click Log Hours on the TREND Application Login dialog box.

The Employee Hours Worked dialog box is displayed.



Note: If you did not create a worksheet for today, a message box is displayed asking if you would like one created. Click Yes.

5. Type the total time you worked. You can enter the time as a combination of hour and minute increments, in minutes only, or by percentage as calculated by the time clock. All time entered will automatically adjust to the accurate hours, minutes, and percentages.

Note: The WIP data will import automatically at the end of the day. Make sure the amount you type includes the time you spent using WIP.

6. Click OK. The total hours you worked is logged in TREND and you are automatically logged out.

Note: You can also log your total hours for a day from the Worksheet Entry module. For more information, see Entering Total Hours for the Day in the Using the Worksheet Entry Module section.

Passwords

Although you are required to change your password the first time you log on, TREND allows you to change your password at any time.

To change your password:

1. Select Tools, then Change Password from the menu bar.
2. Type your new password in the Enter New Password box, then press Tab.



The screenshot shows a dialog box titled "TREND - Security". It contains three input fields: "User ID:" with the value "tst01", "Enter New Password:", and "Re-enter New Password:". Below the fields are "OK" and "Cancel" buttons. At the bottom, it says "* Password last changed: 02/12/2004 10:34:15 am".

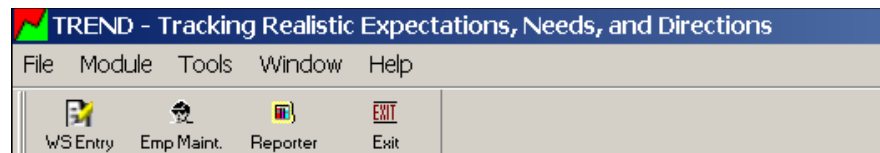
Note: The password must contain six or more alphanumeric characters. The first position cannot be a number.

3. Re-type your new password in the Re-enter New Password box, then click OK. A message will display indicating that your password was changed successfully.

The Main Window

The Main window has a menu bar and a toolbar. Depending on the role you are assigned, one or more of the following module buttons are displayed on your toolbar after you log on:

- Worksheet Entry
- Employee Maintenance
- Reporter



To open a module:

Do one of the following:

- Click the button representing the module you want to open on the toolbar.
- Select the module name from the Module menu on the menu bar.

Note: If you set your user preferences for the Worksheet Entry module to Employee Mode, the Worksheet Entry module will automatically open when you log on. For more information, see User Preferences in the Using the Worksheet Entry Module section.

Customizing Table Colors

You can customize all tables to which you have access by changing the colors of the grid. For example, your worksheet in the Worksheet Entry module.

To change the grid colors:

1. Select Tools, then User Preferences from the Main menu.
2. Select the General Tab, then select the Grid Highlighting check box.
3. Click the Background Color boxes to change the color options.
4. Select a color, then click OK.

Using the Worksheet Module

All managers and employees can create worksheets. Employees enter their worksheet data on a daily basis. The hours displayed on the worksheet header should be equal to the hours recorded in the payroll system for the day. Some data is entered automatically at the end of each day through an import process from the WIP system. Once the data has been imported, the employee no longer has the capability to modify their worksheet for the day. However, comments to worksheet entries can be added, modified, or deleted to any worksheet, regardless of the date. If you are an employee and you need to modify worksheet entries for a date prior to today, contact your supervisor or manager to make the necessary changes.

To open the Worksheet Entry Module:

Do one of the following:

- To automatically open the Worksheet Entry window when you log on, set the Worksheet module to Employee Mode in the Tools/ User Preferences menu. For more information, see *User Preferences*.



- Click the WS Entry button from the toolbar.

User Preferences

If you use the Worksheet Entry module daily, it is recommended that you set your user preferences first. You can set up the Worksheet Entry module to automatically display your worksheet entry grid each time you log on to enable quick data entry.

To set user preferences for worksheet entry:

1. Select Tools, then User Preferences from the main window.
2. Select the Worksheet Entry tab.

The screenshot shows the 'User Preferences' dialog box with the 'Worksheet Entry' tab selected. The dialog has four tabs: 'General', 'Worksheet Entry', 'Employee Maint.', and 'Reporter'. The 'Worksheet Entry' tab is active. It contains the following settings:

- Employee Mode:** (unchecked). Below it is a note: "Check this box to automatically open the Work Sheet Entry module, create or retrieve a header for the current day and user, and add an entry record to input data."
- From Date Type:** One day prior to Current (dropdown menu). Below it is a note: "Select the date type or actual date to display in the 'From' column."
- To Date Type:** Current Date (dropdown menu). Below it is a note: "Select the date type or actual date to display in the 'To' column."
- Activity:** MEETING (dropdown menu). Below it is a note: "Select an activity to be used as default activity when adding worksheet entries."
- All Employees:** (checked). Below it is a note: "Check this box to make the default selection 'Select All' for the Employee field on the worksheet. This will only apply if you can also access other employee worksheets."

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Reset'.

3. Perform one or more of the following modifications:
 - Select the Employee Mode check box to automatically open the Worksheet Entry module, create or retrieve a header for the current day and user, and add an entry record to input data.
 - Select the date type you want to display in the From column of your worksheet. If you select Actual Date, select the date from the Calendar.
 - Select the date type you want to display in the To column of your worksheet. If you select Actual Date, select the date from the Calendar.
 - Select the activity you want to display as the default when adding a worksheet entry.
 - Select the All Employees checkbox to set the default selection for the Employee drop-down box on the worksheet to "Select All."
4. Click OK.

Layout of the Worksheet Entry Window

The Worksheet Entry window contains a menu bar and a second toolbar. All functions available from the toolbar are also accessible from the menu bar.

The screenshot shows the 'TREND - Worksheet Entry' window. At the top, there is a menu bar (File, Edit, Module, Tools, Window, Help) and a toolbar with icons for New WSH, Enter Time, Comments, Group WSE, Add WSE, Copy WSE, Delete WSE, Save, Print, and Close. Below the toolbar is the 'Query' section with fields for Employee, Date (From: 3/25/2004, To: 3/26/2004), and a 'Retrieve' button. To the right of the Query section is the 'Worksheet Header List' table, which shows columns for Date, Employee Name, Shift, and Minutes Worked. Below these is the main 'Earned Hours' table with columns for Entry ID, County, Order Year, Order Number, Product Class, Activity, Sponsoring Worksite, Vol., Total Minutes, Comments, WIP Logout Queue, and WIP Logout Date. The 'Total Minutes' column in the Earned Hours table is highlighted in red. At the bottom of the window, there is a status bar showing '0 minutes (0 hrs. and 0 min.)'.

Query Section →

Worksheet Entries →

Earned Hours are flagged in red →

Worksheet Header List →

Total minutes worked on a given day after the WIP import process is completed →

Total minutes entered for the selected worksheet →

Query

The Query section is located on the upper left portion of the worksheet window and is displayed according to the role assigned. If you can view and modify other employee worksheets for multiple dates, the Employee box has a drop-down arrow for selecting one or more employees from a list. However, if you can view and modify only your own worksheet data, the Employee box is dimmed and you may modify data for the current day and only view worksheets for previous dates.

Worksheet Header List

The Worksheet Header list is located to the right of the Query section. It displays the worksheets for the dates entered in the Query section. Your assigned user role will determine whether you can view or modify a selected worksheet. You can add or view a comment for any worksheet date listed. For more information, see *Retrieving and Modifying Worksheets*.

Worksheet

The Worksheet area is located below the Query section and Worksheet Header list. It displays the worksheet entries for the current day or for any worksheet you have selected from the Worksheet Header list. The table on the next page defines what to enter or what is automatically displayed in each column.

Earned Hours

Depending on your user role, worksheet entries may be flagged in red to indicate earned hours.

To complete a worksheet for the current day:

1. Log on to TREND.



2. Click the WS Entry button on the toolbar or to automatically display a worksheet for the current day each time you log on, set your user preferences in the Worksheet Entry module to Employee Mode. For more information, see *User Preferences* earlier in this section.
3. Type the appropriate data in the worksheet entry columns. For information on entering data in the worksheet, see the *Column and Description* table on the next page.

Note: You must enter data in the County, Order Year, Order Number, and Product Class columns, or leave the three columns (Order Year, Order Number, and Product Class) blank.



4. Click the Add WSE button on the toolbar each time you want to add another activity (worksheet entry).



5. Click the Enter Time button on the toolbar when you have entered the last worksheet entry for the day.
6. Type the total time you worked. You can enter the time as a combination of hour and minute increments or all minutes.

Note: WIP data will import automatically at the end of the day. Make sure the amount you type includes the time you spent using WIP.

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Column	Description
Entry ID	Automatically entered as a worksheet record entry is added. Number of entry for the current day.
County	Type the county number where the work was requested. To find a number, click in the County column, then select Browse on the toolbar. For more information, see <i>Searching for County Number and Product Codes</i> on the next page.
Order Year	Optional. Type the year the order was requested.
Order Number	Optional. Type the order number for the product.
Product Class	Optional. Type the product code. To display a list of products and codes, click in the Product Class column, then select Browse on the toolbar. For information, see <i>Searching for County and Product Codes</i> .
Activity	Select the activity performed. An activity must be entered before adding a new worksheet entry. If you often select the same activities when adding a worksheet entry, see <i>User Preferences</i> earlier in this section for instructions on how to set up a default activity.
Sponsoring Worksite	Select the worksite location where the work was accomplished.
Vol.	Select the number of units requested.
Total Minutes	Select the total number of minutes it took to complete the assigned task.
Comments	Optional. Type any additional comments relating to the record entry. Comments can be added, modified, or deleted for any worksheet, regardless of the date. To view a previously added comment while adding a new worksheet entry, click the Comment portion for the worksheet date in the Worksheet Header List.
WIP Logout Queue	Queue to which an employee logs a product when completing an activity (e.g., EXAM).
WIP Logout Date	The date and time stamp for the WIP Logout Queue.
Created By	View only. Displays the Login of the user who initially created the record entry.
Created On	View only. Displays the date and time the entry was created.
Modified By	View only. Displays the Login of the user who last modified the record entry.
Modified On	View only. Displays the date and time the entry was last modified.
RE Value	The expected time to complete an activity.