



Employee Manager Utility™ Version 1.3.2

Administration Series™

Installation and User's Guide

Trademarks

First Choice Software, Inc. (FCS) develops and supplies add-on software and customizations to the following Clarify products:

- ClearSupport
- ClearHelpDesk
- Policies and Customers
- Product Manager
- ClearLogistics
- ClearQuality
- ClearContracts
- ClearSales
- ClearTelebusiness

FCS uses the following Clarify tools:

- User Interface Editor
- Data Dictionary Editor
- Data Exchange
- ClearBasic Exchange
- ClearBasic Batch

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Overview

General Overview

This document describes an administration utility that allows an administrator to associate employee properties (such as queues, office location, supervisor, and resource configuration) to a workgroup.

New employees that are assigned to that workgroup can automatically inherit all of the proper attributes. This will speed up and simplify the process of adding new employees to the Clarify database, since most of the attributes for an employee will be defined by the type of job they are destined to be performing.

When an employee changes work assignments, the attributes of the new workgroup can override the current settings for the employee automatically just by changing the workgroup.

This administration utility is known as First Choice Software, Inc.'s *Employee Manager Utility* (EMU).

This product is a Clarify-based application that is internationalized and localized. The application ships with a set of default strings in US English. This document describes how to easily modify the database to allow users to operate the product in different locales (simultaneously).

Before You Upgrade to a New Version...

You should be aware of both the version of the product you currently have as well as the version you are upgrading to.

You may upgrade several revision levels at one time. To perform this multiple-upgrade, you must create a list of files to upgrade. Find the section of the manual with instructions for upgrading from your current software revision. Make a list of the required steps. Repeat this process with each update, adding these steps to the list. If a step is required by more than one version, you only have to list it once.

When your list is completed, you should perform all the steps (in the same order you would install the product (schema first, then files and forms, then resource configurations, then code compilation) for a clean install) using the files provided with the most recent version of the product.

For example, suppose you had version 1.1 of a product, and versions 1.1.1, 1.2, and 1.3 have all been released. You now wish to upgrade from version 1.1 directly to version 1.3. Suppose that the versions require the following steps:

Version 1.1.1 requires that you compile files a.cbs and b.cbs.

Version 1.2 requires that you add a new field to the case table, and recompile a.cbs.

Version 1.3 requires that you import a data file d.dat, import a new form file, c.dat (add it to the resource configuration), and compile c.cbs.

To perform the total upgrade in this situation you would perform the following steps:

1. Add the new field to the case table (schema changes always come first)
2. Import the d.dat file file (data imports come next)
3. Import the c.dat form, and add it to the proper resource configuration(s).
4. Compile the a.cbs, b.cbs, and c.cbs files.

All of these steps would be accomplished with the files provided with the 1.3 version of the product. If you have questions about this process, please contact First Choice Software.

What's New in Version 1.3.2

This release fixes a small bug in that when creating a new employee from the employee form, the user was not always getting assigned to the correct queues. This has been corrected.

- To apply this patch, copy the em703.cbs ClearBasic source file over the old copy of that file and recompile.

What's New in Version 1.3.1

This release incorporates additional performance enhancements, especially when updating workgroups that have large amounts of queues. Previously, when a workgroup was updated, and these changes were propagated to the users, all changes were propagated, including the queues, even if the queues for this workgroup hadn't been changed. With this patch release, this functionality has changed. If the queues for a workgroup have not changed, and the workgroup is updated, the queue/user relationships are left alone. If the queues for a workgroup have changed, then these queue changes are propagated to the users.

- To apply this patch, copy the following ClearBasic source files over the old copies of those files, then recompile them.
 - em_global.cbs
 - em2265.cbs (if using Clarify version 6.x or below)
 - em2265-70.cbs (if using Clarify version 7 or above)
 - em2272.cbs

What's New in Version 1.3

This release incorporates additional performance enhancements, especially when moving employees into workgroups that have large amounts of queues. Specifically, the removing of employees from queues has been done using a SQLDB object, which performs direct SQL, rather than using a BulkSave. This dramatically reduces the amount of SQL that EMU performs.

A new configuration item (**EM_ALLOW_SA**) has been added. This config_itm determines whether the "sa" employee/user will be shown in the list of available employees on the Members tab of the Employee Manager form.

Also, a bug was found in the em.dir file, which is the directives file for compiling the ClearBasic code. The line in the file used for compiling em_global_fd.cbs listed the app_server subsystem as "appsvr" rather than "appsrv". This has been fixed.

To apply this patch, perform the following steps:

- Import the new em_config.dat file.
- Copy the following ClearBasic source files over the old copies of those files; then recompile them.
 - em_global.cbs
 - em_global_fd.cbs

- o em2272.cbs
- o em.dir

What's New in Version 1.2

This release changes the behavior of the **Employee Manager** form, specifically how and when employee data gets updated.

The **Update Attributes** button has been removed from the **Members** tab.

The **Copy >>**, and **<< Remove** buttons now contain the functionality to propagate workgroup data (update attributes) to the employees. This behavior is defined by a new config_itm called *EM_Propagate* (see Configuration Items). If this config_itm is set to "Always", the workgroup data is immediately propagated to the employees. If it is set to "Never", the workgroup of the selected employees is changed, but none of the other workgroup data. If the config_itm is set to "Ask", then the user is asked if they want to propagate the workgroup data or not.

Additional changes from earlier versions:

The **Replace** button now prompts the user and asks if they want to propagate changes to the current members.

You must save or discard any changes to the workgroup data before you can add or remove members.

Use Feature checkboxes have been added for **Field Engineer**, **Allow Proxy**, and **Acting Supervisor** checkboxes on the **Members Data** tab. Previously, there was no way to define whether these attributes should be applied or not to the workgroup members – so they were always applied.

In previous versions, when changing workgroups for an employee on the employee form, the start date of the employee would get reset to today. The employee start date is now preserved.

You can no longer change the selected Workgroup before completing or canceling member data modifications.

The performance of the product has been enhanced, especially when processing large amounts of members.

Some modifications have been made to this document for syntactical correctness and consistency of form. The Year 2000 section of the document has been removed, as it is no longer relevant.

To apply this patch, perform the following steps:

- Import the new em2272.dat file.
- Import the new em2266.dat file.
- Make sure the above forms are in the proper resource configuration(s).
- Import the new em_strings.dat file.
- Import the new em_config.dat file.
- Copy the following ClearBasic source files over the old copies of those files; then recompile them.
 - o em_global.cbs
 - o em_global_fd.cbs

- o em2272.cbs
- o em2265.cbs (if using Clarify version 6.x or below)
- o em2265-70.cbs (if using Clarify version 7 or above)
- o em2266.cbs
- o em2267.cbs
- o em2268.cbs
- o em2269.cbs
- o em2274.cbs
- o em703.cbs

What's New in Version 1.1.1

There are a few small bug fixes in version 1.1.1. They are:

1. An extraneous message box was posted whenever the date form was exited.
2. There are three new fields added to the workgroup object, and the **Notifications** tab on the **Workgroup** form has been updated.
3. The employee more information form had a small bug (due to a bug in Clarify) that sometimes did not save the preferences correctly. This has been worked around. Multi-tiered environments must use a new global module compiled on the application server.

To apply this patch, perform the following:

1. Export the schema. Copy the new version of the workgroup object from the included schema file, and apply the new schema.
2. Import the new em2269.dat file.
3. Copy and compile several new versions of code modules: em1956.cbs, em2265-70.cbs (if you have 7.0 or later), em2269.cbs, em703.cbs, em707.cbs. There is a new em.dir file to compile the new code module, em707.cbs, and the new global module, em_global_fd.cbs.

What's New in Version 1.1

Version 1.1 adds new functionality and corrects a couple of other small issues.

The new functionality is:

1. The employees currently assigned to a Workgroup can have the workgroup related properties refreshed from the **Member** tab without removing each employee and adding them back in.
2. As employees are removed from a Workgroup, they can be assigned to a different existing workgroup, and have the workgroup properties for the new group updated from the **Member** Tab.

The other changes are:

1. The **Add Workgroup** Form (2274) now shows the list of available workgroups alphabetically.
2. The acting supervisor now gives a message if the employee selected is not a supervisor.

To apply this patch, perform the following steps:

- Import the new em2272.dat file.
- Import the new em2265.dat file.
- Make sure the above two forms are in the proper resource configuration(s).
- Import the new em_strings.dat file.
- Copy the following ClearBasic source files over the old copies of those files; then recompile them.
 - em2265.cbs
 - em703.cbs
 - em2273.cbs
 - em2272.cbs

What's New in Version 1.0.2

Version 1.0.2 corrects a number of small issues in the form code modules.

The changes are:

3. The **Workgroup** Form (2265) and its tabs now show the lists of workgroups, queues, and employees in alphabetical order.
4. The **Workgroup** Form (2265) now gracefully allows Clarify to be closed while 2265 is open.
5. If changes are made to one workgroup, the changes must be saved or discarded before another workgroup can be selected.
6. Spelling of ' Privilege' was corrected in 3 places.
7. One fc_string table item was added for a new warning message.

To install these changes to version 1.0.1, import the em2265.dat file and the em_strings.dat file, and compile the em2265.cbs and em2272.cbs files into the database. The instructions for these steps is located in the Install Section of this document.

What's New in Version 1.0.1

Version 1.0.1 corrects a number of small issues in the form code modules.

The changes are:

1. The **Employee** Form (703) had an error when trying to add New employees. The root_objid field was not initialized in this case.
2. The **Employee** Form (703) did not update the supervisor when the Workgroup was changed. The **Supervisor** drop down list needed to be pre-filled with the list of names so that a search would find the correct name to be displayed.
3. The **Add Workgroup** Form (2273) did not allow new workgroup names to be entered into the text box.

Terminology

This section includes definitions of some basic terminology that may be needed when reading this document:

Term	Definition
ClearSupport	Clarify call-tracking product that will be used with this interface by customers.
Employee	A ClearSupport user in your company. An individual who can log in to the system through the application.
Policies and Customers	Clarify tool used to set up and customize Clarify applications.
Queue	A way to organize support specialists and the flow of tasks throughout a service organization.
User Defined Pop-Up List	List of items that appear in Pop-Up Menus as defined by the Clarify system administrator.
Workgroup	Database object that contains initial attributes and preferences for the employees that are assigned to the workgroup.

Employee Manager Forms

This section describes the Employee Manager Utility forms provided with the product. These forms provide a method to set up and maintain the workgroup information that is stored in the database.

Employee Manager Form

The screenshot shows the 'Employee Manager' application window. At the top, there is a search filter dropdown set to 'All' and a 'Find' button. Below this is a table with the following data:

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

To the right of the table are buttons for 'Add..', 'Replace', 'Delete', 'Clear', and 'Done'. Below the table is a tabbed interface with tabs for 'Member Data', 'Locale', 'Privileges', 'Notifications', 'Business Calendar', 'Queues', and 'Members'. The 'Member Data' tab is active, showing fields for 'First Name' and 'Last Name', a 'Resource Config' dropdown set to 'resource_config_1.0', a 'Labor Rate' field set to '0', and a 'Workgroup Start' section with radio buttons for 'Today' (selected) and 'Date' (with a date field showing '??/??/??'). On the right side of the 'Member Data' tab, there are several 'Use Feature' checkboxes: 'Acting Supervisor', 'Field Engineer', 'Allow Proxy', and 'Starts Today'.

The top half of the **Employee Manager** form (2265) contains the basic functionality for the management of workgroup objects and their attributes. The dropdown list box at the top of the form can be used to specify a filter that can be applied. A new filter can be created and saved by clicking the pencil icon. The default filter is "All" workgroups. The **Find** button fills in the custom list box when it is clicked.

Click the **Add** button to create a new workgroup for the database. A list of workgroup names will be displayed, and the desired workgroup can be selected from the list and added as a workgroup. The list of workgroups is defined through Policies and Customers in the "WORKGROUP" User Defined Pop-Up List.

When the workgroups are displayed in the custom list box, one of the workgroups shown can be selected. When it is selected, the tab forms at the bottom of the main form will be filled in based on the information retrieved from the database for the selected record in the workgroup table.

The **Replace** button is used to save any changes made to the workgroup's attributes back to the database. It is not enabled until a workgroup is selected from the custom list area, and a value is modified on one of the tab forms at the bottom of the screen.

The **Delete** button will delete the workgroup attributes for a specified workgroup. Note that this does not delete the workgroup (it can have new attributes added to it), and does not change the attributes of any employees in that workgroup.

The **Clear** button will unselect the current workgroup and disable and clear all of the attributes from the tab forms.

The **Done** button is used to close the **Employee Manager** form. If data has been changed for the currently selected workgroup, then the user will be prompted to save or discard the changes, or to cancel the close form action.

Member Data Tab

The first tab is the **Member Data** (form 2266), which is also shown above. If the checkboxes at the left edge of the tab are checked, then the corresponding controls in the middle of the form are enabled. This methodology will apply to all of the tab forms that are part of Employee Manager.

The **Supervisor** field (if checked) indicates the employee that has been designated as the default supervisor for new employees that are assigned to the chosen workgroup. The Select Employee form can be opened; just click the checkmark icon to the right of the **Last Name** text box. For a supervisor that is shown, the **More Info** icon can be used to see the employee details.

The **Resource Config** field (if checked) sets the default resource configuration that new employees will be initially added to. The dropdown list box will show the list of available resource configurations that are available for selection.

The **Labor Rate** field (if checked) sets the default value for new employees that are assigned to the chosen workgroup.

The **Workgroup Start** field (if checked) allows the default value for the workgroup start date of new employees to be set. It can be set to reflect the actual date the employee is added to the workgroup or to a predetermined date for the chosen workgroup.

If the First Choice Software **Source Control Interface™** product has been installed on the active database, then another field will be activated on the form. The **Source Control** field (if checked) sets the default source control interface that new employees will use. The dropdown list box will show the list of available source control interfaces that are available for selection.

If the **Use Feature** checkbox is checked for Acting Supervisor, then the value of the **Acting Supervisor** checkbox will be used for workgroup members.

If the **Use Feature** checkbox is checked for Allow Proxy, then the value of the **Allow Proxy** checkbox will be used for workgroup members.

If the **Use Feature** checkbox is checked for Field Engineer, then the value of the **Field Engineer** checkbox will be used for workgroup members.

If the **Starts Today** checkbox is checked, then the start date for the employee will be set to the current date and time when creating a new employee. This checkbox is only used when creating new employees. It is not used at any other time.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database.

Locale Tab

The screenshot shows the 'Employee Manager' application window. At the top, there is a search bar with 'All' selected and a 'Find' button. Below this is a table with the following data:

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

Below the table are several buttons: 'Add...', 'Replace', 'Delete', 'Clear', and 'Done'. At the bottom, there are tabs for 'Member Data', 'Locale', 'Privileges', 'Notifications', 'Business Calendar', 'Queues', and 'Members'. The 'Locale' tab is selected, showing the following fields:

- Use Feature
- Site Name/ID: Main Office (text box), INT1 (text box), [checkmark icon], [more info icon]
- Fax Number: [text box]
- Mail Stop: [text box]
- Default Printer: lp (dropdown menu)

The **Locale** tab (form 2267) has more attributes that can be set and used as defaults for new employees being added or reassigned to the selected workgroup.

The **Site Name/ID** field (if checked) indicates which site the employee will be located at by default. The **Select Site** form can be opened; just click the checkmark icon to the right of the **Site ID** text box. For a site that is already shown, the **More Info** icon is used to see the site details.

The **Fax Number** field (if checked) will show the default fax number that will be filled in for the employee that is being processed as a new workgroup member.

The **Mail Stop** field (if checked) will indicate the default mail stop for the workgroup's new employees.

The **Default Printer** field (if checked) will allow the proper printer to be selected for use by the members of the selected workgroup. The list of printers is defined through Policies and Customers in the "DEFAULT_PRINTER" User Defined Pop-Up List.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database.

Privileges Tab

The screenshot shows the 'Employee Manager' application window. At the top, there is a search bar with 'All' selected and a 'Find' button. Below this is a table with columns: Workgroup, Site, Online Privilege, and Offline Privilege. The table contains the following data:

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

To the right of the table are buttons: Add..., Replace, Delete, Clear, and Done. Below the table is a tabbed interface with tabs: Member Data, Locale, Privileges (selected), Notifications, Business Calendar, Queues, and Members. The 'Privileges' tab is active and shows the following settings:

Use Feature

Online Privilege Logistics Manager

Offline Privilege Offline User

The **Privileges** tab (form 2268) is used to select the Online/Offline defaults for the workgroup members. The list of privileges is defined through Policies and Customers in the **Privilege Class** form under the Setup menu. The list shown under each dropdown list box will correspond to the offline field.

The **Online Privilege** field (if checked) will allow the proper online privilege to be selected as the default for the members of the selected workgroup.

The **Offline Privilege** field (if checked) will allow the proper offline privilege to be selected as the default for the members of the selected workgroup.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database.

Notifications Tab

The screenshot shows the 'Employee Manager' application window. At the top, there is a search bar with 'All' selected and a 'Find' button. Below this is a table with columns: Workgroup, Site, Online Privilege, and Offline Privilege. The table contains three rows of data. To the right of the table are buttons for 'Add..', 'Replace', 'Delete', 'Clear', and 'Done'. Below the table is a tabbed interface with tabs for 'Member Data', 'Locale', 'Privileges', 'Notifications', 'Business Calendar', 'Queues', and 'Members'. The 'Notifications' tab is active, showing a checked box for 'Default Notifications Active'. Below this are two sections: 'During Business Hours Notification method:' and 'After Business Hours Notification method:'. Each section has three rows for 'High', 'Medium', and 'Low' priority, each with a dropdown menu. The 'High' dropdown for 'During Business Hours' is currently set to 'Digital Pager', while all other dropdowns are set to 'Email'.

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

Default Notifications Active

During Business Hours Notification method:

High: Digital Pager

Medium: Text Pager

Low: Text Pager

After Business Hours Notification method:

High: Email

Medium: Email

Low: Email

The **Notifications** Tab (form 2269) is used to configure the default selections for the Notification Information for the new workgroup members.

The **During** dropdown list box is used to select either Normal Business Hours or After Hours for the default timeframe of the notification process.

The **High**, **Medium**, and **Low** dropdown list boxes are all used to indicate the preferred methods of communication in the event that a notification needs to be made, corresponding to the during business hours or after business hours time period. The lists for all six dropdown list boxes are the same, and each one is coded in the form as a static list for each control.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database.

Business Calendar Tab

The screenshot shows the 'Employee Manager' application window. At the top, there is a search bar with 'All' selected and a 'Find' button. Below this is a table with columns: Workgroup, Site, Online Privilege, and Offline Privilege. The table contains three rows of data. To the right of the table are buttons for 'Add..', 'Replace', 'Delete', 'Clear', and 'Done'. Below the table is a tabbed interface with tabs for 'Member Data', 'Locale', 'Privileges', 'Notifications', 'Business Calendar', 'Queues', and 'Members'. The 'Business Calendar' tab is active, showing a 'Use Feature' section with a checked 'Business Calendar' checkbox and a text box containing 'normal hours'. Below this is an 'Effective Date' section with a checked checkbox and two options: 'Today' (selected) and 'Date' (with a text box containing '01/01/2001 1').

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

The **Business Calendar** Tab (form 2274) is used to select and configure the business calendar selection for the new workgroup members.

If the **Business Calendar** checkbox is marked with a check, then the business calendar can be selected. Type the desired calendar title in the text box, and then click the checkmark button to verify the selection. Alternatively, just click the checkmark button to show the Select Business Calendar dialog and make the selection using that form.

If the **Effective Date** checkbox is marked with a check, choose either the **Today** option or the **Date** option to indicate the default effective date for the business calendar. If the **Date** option is chosen, enter a valid date in the text box or click the calendar button to open the date dialog box.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database.

Queues Tab

Workgroup	Site	Online Privilege	Offline Privilege
Logistics	Main Office	Logistics Manager	Offline User
Product Speciali		Telemarketing Agent	Offline User
Quality Engineer		QA Engineer	
SSE			

Member Data | Locale | Privileges | Notifications | Business Calendar | **Queues** | Members

List Queues where Name: **Starts with** [] [List]

Available Queues: [] Selected Queues: [LOGISTICS, WebSupport]

[Copy >>] [<< Remove]

The **Queues** Tab (form 2271) is used to choose the queues that the members of the selected workgroup will be attached to initially.

Select the desired filter option from the dropdown list box and enter a full or partial queue name to filter by. Click the **List** button to fill the **Available Queues** custom list box with the matching name(s).

To add queues to the **Selected Queues** custom list box, select the name in the **Available Queues** custom list box, then click the **Copy >>** button.

To remove queues from the **Selected Queues** custom list box, select the name in the **Selected Queues** custom list box, then click the **<< Remove** button.

Once the necessary changes have been made, click the **Replace** button to update the workgroup record in the database and update the appropriate relations to the queue records.

Members Tab

The **Members** Tab (form 2272) is used to add or remove employees from the selected workgroup.

Select the desired filter option from the dropdown list box and enter full or partial first and last names to filter by. Click the **List** button to fill the **Available Employees** custom list box with the matching name(s). Depending on the value of the **EM_allow_sa** configuration item, “sa” may or may not show up in the list of available employees.

To add employees to the **Selected Employees** custom list box, select the name in the **Available Employees** custom list box, then click the **Copy >>** button. Depending on the value of the **EM_Propagate** config_itm, the following will occur:

- Always – All workgroup data will be propagated to the selected employees
- Never – Only the work_group of the selected employees will be reset to the current workgroup
- Ask – The user will be prompted if they want to propagate workgroup data to the selected employees. If they answer Yes, All workgroup data will be propagated to the selected employees.

If they answer No, only the work_group of the selected employees will be reset to the current workgroup.

To remove employees from the **Selected Employees** custom list box, select the name in the **Selected Employees** custom list box, then click the << **Remove** button. As employees are removed, the employee will be assigned to the workgroup currently displayed in the dropdown list box below the remove button. The employees are moved to the specified workgroup immediately.

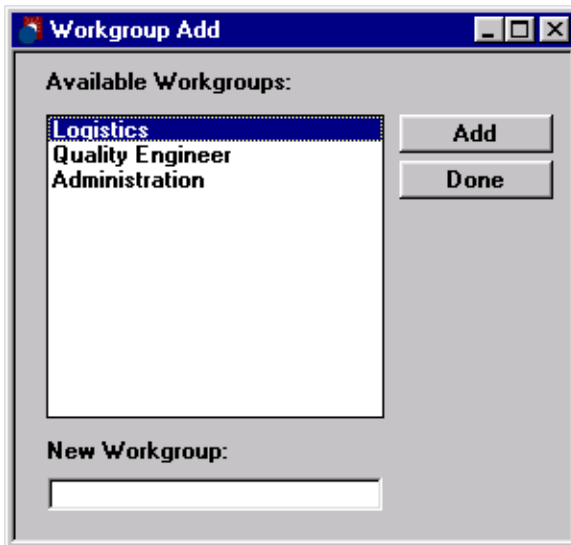
Depending on the value of the *EM_Propagate* (see Configuration Items) config_itm, the following will occur:

Always – All workgroup data will be propagated to the selected employees

Never – Only the work_group of the selected employees will be reset

Ask – The user will be prompted if they want to propagate workgroup data to the selected employees. If they answer Yes, All workgroup data will be propagated to the selected employees. If they answer No, only the work_group of the selected employees will be reset

Workgroup Add Form



The **Workgroup Add** form (2273) is used to create new workgroup objects in the database. When the **Add** button is clicked on the **Employee Manager** form, this form is displayed and initialized. The list of **Available Workgroups** that is shown is comprised of the remaining set of items (that do not already have corresponding workgroup objects) from the list defined through Policies and Customers in the "WORKGROUP" User Defined Pop-Up List.

To add a workgroup, select the line workgroup from the list or type in the name of a new workgroup in the **New Workgroup** text box, and then click the **Add** button. The workgroup record will be added to the table, and the form will be refreshed with the remaining workgroup names. Selecting an existing workgroup will clear any text that is in the **New Workgroup** text box. Likewise, typing a workgroup name in the **New Workgroup** text box will unselect a selected line in the **Available Workgroups** custom list box.

When the additions have been completed, click the **Done** button to close the form and return to the **Employee Manager** form.

Employee Form

Employee Sam Tyson

First Name: Last Name:

Login Name: Password:

ID: Online Priv:

Active Allow Proxy Offline Priv:

Resource Cfg:

Employee Details:

Site Name: Prim. Phone No:

Start Date: Alt. Phone No:

Supervisor: Fax Phone No:

Work Group: Reset Attr. Pager No:

Start Date: Email Address:

Labor Rate: Mail Stop:

Role: Acting Supervisor Field Engineer

The **Employee Form** (703) is used to modify accounts for the Clarify users in the database. EMU adds the **Resource Configuration** dropdown list and the **Reset Attributes** checkbox to the baseline Clarify form.

When an employee is assigned to a workgroup using the **Work Group** dropdown list on this form, the **Reset Attributes** checkbox is used to indicate whether the workgroup's attributes should be used to update the corresponding employee attributes. If the box is checked when the workgroup assignment is updated, the employee attributes will be modified as necessary.

The **Active**, **Allow Proxy**, **Acting Supervisor**, and **Field Engineer** checkboxes will be checked or cleared. The **Online Privilege**, **Offline Privilege**, **Resource Configuration**, and **Supervisor** dropdown lists will have the appropriate value selected. The **Site Name**, **Start Date**, **Work Group** **Start Date**, **Labor Rate**, **Fax Phone**, and **Mail Stop** will be updated. The **More Info** form will show the Notification option selected, and the **Schedule** form will be updated to reflect the default workgroup schedule.

Implementation

This section lists the requirements for installation along with all the files included with the product and information about new strings, tables, relations, forms, etc. It also addresses any other implementation considerations.

Strings

EMU utilizes a set of strings for labels, captions, and messages. Every string that is displayed by EMU is contained in a new database table, and the input for that table is contained in the file *em_strings.dat*. The list of strings used by EMU follows in this section. To modify any of the strings, edit the *em_strings.dat* file with a text editor, and change the string. Then import the file as detailed below.

There are two primary modifications that are commonly made to this file:

- **Changing the English value for the string.** Simply locate the string object in the file and change the `STRING="<the string>"` line. Make sure to retain any parts of the string that start with a percent sign and contain a number. For example, `%1s`, `%2d`. These are used for parameter substitution.
- **Adding a new version of the string for another locale.** Make a copy of the English version of the string (from the `OBJECT` line to the `END_OBJECT` line). Change the locale from `EN_US` to the desired locale, and change the `STRING="<the string>"` line. For more information, contact First Choice Software.

The strings for EMPLOYEE MANAGER are as follows:

ID	STRING
	Labels for Employee Manager form (2265)
13899	Delete
13900	Employee Manager
13901	Find
13902	Add...
13903	Replace
13904	Clear
13905	Done
	Labels for Employee Manager form (2265)
13906	Use Feature
13907	Supervisor
13908	Resource Config
13909	Labor Rate
13910	Source Control
13911	First Name
13912	Last Name
	Labels for Employee Manager Member Data Tab (2266)
13913	Use Feature
13914	Acting Supervisor
13915	Field Engineer
13916	Allow Proxy
13917	Starts Today

13960	Workgroup Start
13961	Today
13962	Date
13963	Update Attr
	Labels for Employee Manager Locale Tab (2267)
13918	Use Feature
13919	Site Name/ID
13920	Fax Number
13921	Mail Stop
13922	Default Printer
	Labels for Employee Manager Privileges Tab (2268)
13923	Use Feature
13924	Online Privilege
13925	Offline Privilege
	Labels for Employee Manager Notifications Tab (2269)
13926	Default Notifications Active
13927	Notification Information:
13928	During:
13929	Notification method when urgency is:
13930	High:
13931	Medium:
13932	Low:
	Labels for Employee Manager Business Calendar Tab (2274)
13933	Use Feature
13934	Business Calendar
13935	Effective Date
13936	Today
13937	Date
	Labels for Employee Manager Queues Tab (2271)
13938	List Queues where Name:
13939	Available Queues:
13940	Selected Queues:
13941	List
13942	Copy >>
13943	<< Remove
	Labels for Employee Manager Members Tab (2272)
13944	List Employees whose Name:
13945	Available Employees:
13946	Workgroup Members:
13947	Last Name:
13948	First Name:
13949	List
13950	Copy >>
13951	<< Remove
	Labels for Employee Manager Workgroup Add (2273)

13952	Available Workgroups:
13953	Add
13954	Done
	Labels for Internationalized Message Box (1947)
10120	OK
10121	Cancel
10122	Yes
10123	No
10124	Save
10125	Discard
10126	Abort
10127	Retry
10128	Ignore
	Labels for Internationalized Date Dialog (1956)
12250	OK
12251	Cancel
12260	Invalid message format received
12261	Invalid value for month field,
12262	Invalid value for day field,
12263	Invalid value for hour field,
12264	Invalid value for minute field,
12265	Invalid value for year field,
12266	Invalid character entered,
12267	Invalid value for seconds field,
12280	Date Entry
12281	Date:
12282	Month
12283	Day
12284	Year
12285	/
12286	/
12287	Time:
12288	Hour
12289	Minute
12290	Seconds
12291	:
12292	
12293	am
12294	pm

13980 - 13987 Error/Informational Messages

ID	STRING
13980	Data has been Modified. Are you sure you want to exit?

13981	WARNING!
13982	Supervisor no longer exists in employee database.
13983	Site no longer exists in database.
13984	Business Calendar no longer exists in database.
13985	No valid Supervisor Selected. Please Enter a valid supervisor name or press the check mark to select.
13986	No valid Site Selected. Please Enter a valid site name or press the check mark to select.
13987	No valid Business Calendar Selected. Please Enter a valid Business Calendar or press the check mark to select.
13988	Site must be selected if Site Name/Id is enabled."
13989	Business Calendar must be selected if Business Calendar is enabled.
13990	ERROR!
13991	OVERRIDE?
13992	Propagate new workgroup data to all workgroup members?
13993	Already exists in WORKGROUP list.
13994	Data has been Modified. Do you want to save changes?
13995	Supervisor selected must be able to be an acting supervisor.
13996	Are you sure you want to delete the Workgroup attributes?
13997	Propagate attributes of workgroup to employee(s) being moved?
13998	Workgroup Data has changed. Please save or discard changes before modifying

New Objects

Tables/Views

This section describes the new tables that will be added to the database.

Table Name	Description	Table Number
fc_string	Holds (internationalized) strings for First Choice applications	3500
fc_locale	Holds (internationalized) strings for First Choice applications	3505
workgroup	Holds (internationalized) strings for First Choice applications	3516

If you are already using any of the above table numbers, you may modify the *em_schema.sch* file and change them to other, unused numbers in the user-defined range (1005-4999).

Data fields and/or Relations

This section lists the tables/views that will be modified for EMU.

Table Name	Description of Change
queue	Add one new relation for queue's related workgroups
privclass	Add two new relations for workgroup's related privileges
employee	Add one new relation for workgroup's related supervisor

site	Add one new relation for workgroup's related site
biz_cal	Add one new relation for workgroup's related business calendar
rc_config	Add one new relation for workgroup's related resource config

Forms

Twelve form updates are provided with EMU. They are:

Form Name	Form Number	Description
Employee Manager	2265	Add/Modify Workgroups
Member Data Tab	2266	Set the supervisor, resource config, labor rate, SCI preferences, and defaults for acting supervisor, field engineer, allow-proxy, and starts-today.
Locale Tab	2267	Set the site name/id, fax number, mail stop, and default printer
Privileges Tab	2268	Set the online and offline privileges
Notifications Tab	2269	Set the notification hours and methods
Queues Tab	2271	Select the related queues
Members Tab	2272	Select the workgroup members
Workgroup Add Form	2273	Create a workgroup object for workgroups
Business Calendar Tab	2274	Set the business calendar and effective date
Select Employee	703	Modify employee attributes, work shift, and schedule
Message Box	1947	Internationalized message box
Date Dialog	1956	Internationalized date dialog

Menu Items

The following new menu item will be added to the Clarify system. These will be added in the ClearBasic method "App_Initialize" in the global module. The necessary code is located in a CB globals module *em_glob.cbs*. This module will be compiled against the database.

Menu	Menu Item	Description
Policies and Customers Setup	Employee Manager	Allows an administrator to add workgroups or modify workgroup attributes.

Configuration Items

There are two configuration items that you will import into Clarify as part of the installation of EMU. It is important to understand what these item are and what they do. In this way, you can set the values for these items to cause EMU to operate in the manner that is best suited for your Clarify implementation.

The following table lists the configuration items (shipped in *em_config.dat*), and what they are used for.

Item Name	Default Value	Description
EM_override	1	Is the override option turned on as the default in the Select Employee Form? Allowable values: 1 or 0
EM_Propagate	Ask	How should Copy/Remove be handled on the Members Tab of the Employee Manager Form? Allowable values: - Ask - Never - Always
EM_allow_sa	1	Should the "sa" user/employee be shown in the list of available employees on the Members Tab of the Employee Manager Form? Allowable values: 1 or 0

Requirements

This version of Employee Manager requires the following:

Clarify Version: 6.0 or later

Clarify Tools: Data Dictionary Editor (ddeditor)
User Interface Editor (uieditor)
Clear Basic Compiler (cbex)
Data Exchange (dataex)

Other Tools: your favorite unzip tool

Packaging

Employee Manager is shipped to you as a zip file.

Files Included in EMU

The following files/directories are provided with this product:

File Name	Purpose
em_user.pdf	EMU user guide and reference document
cb	Directory containing the ClearBasic code
forms	Directory for the forms files
import	Directory containing data files to be imported
schema	Directory containing the schema modifications

The following files are provided in the *cb* directory:

File Name	Purpose
em.dir	Clear Basic directives file for compilation
em2265.cbs em2266.cbs em2267.cbs em2268.cbs em2269.cbs em2271.cbs em2272.cbs em2273.cbs em2274.cbs em1947.cbs em1956.cbs em703.cbs em707.cbs em_global.cbs em_global_fd.cbs em.dir STRING.CBS	Clear Basic code for EMU

The following files are provided in the *forms* directory:

File Name	Purpose
em2265.dat	Employee Manager Form – Clarify 6.x and earlier
em2265-70.dat	Employee Manager Form – Clarify 7.x and later
em2266.dat	Employee Manager Member Data Tab
em2267.dat	Employee Manager Locale Tab
em2268.dat	Employee Manager Privileges Tab
em2269.dat	Employee Manager Notifications Tab
em2271.dat	Employee Manager Queues Tab
em2272.dat	Employee Manager Members Tab
em2273.dat	Employee Manager Workgroup Add Form
em2274.dat	Employee Manager Business Calendar Tab
em1947.dat	Internationalized Message Box
em1956.dat	Internationalized Date Dialog
em703.dat	Select Employee Form – Clarify 7.x and earlier
em703-80.dat	Select Employee Form – Clarify 8.x and later
em707.dat	Employee More Info Form – Clarify 7.x and earlier
em707-80.dat	Employee More Info Form – Clarify 8.x and later

Import Data Files

The following file is provided in the *import* directory:

File	Purpose
em_strings.dat	Internationalized strings for EMU
em_config.dat	Initial configuration data to import for the EMU

Schema Data Files

The following files are provided in the *schema* directory:

File	Purpose
em_schema.sch	Schema changes for new tables, columns, and relations

Installation

EMU files may be installed on any server machine that can execute the Clarify Data Dictionary Editor (ddeditor), the Clarify User Interface Editor (UIEditor), the Clarify Data Exchange Tool (dataex) and the Clarify ClearBasic Compiler (cbex). The ClearBasic source files (*.cbs) should be installed in the same directory as the directives file (em.dir).

Once the install package is unzipped, the following tasks need to be performed during the installation of EMU:

- Update the Clarify Schema
- Import configuration files
- Import updated forms
- Set up resource configurations
- Compile ClearBasic code
- Set up environment variables

Note: It is highly recommended that the EMU product be installed on a test system to become familiar with its operation before installing it on a production system.

Installation Tree

It is recommended that the zip file containing the EMU files be uncompressed into a fchoice subdirectory created at the top of the Clarify install tree. For example, if the target Clarify server install tree is "c:\clarify", then:

- Switch to "c:\clarify" directory.
- Create an "fchoice" directory, if necessary.
- Switch to "fchoice" directory.
- Create a "EMU" directory, if necessary.
- Switch to "EMU" directory.
- Unzip into "c:\clarify\fchoice\ EMU" directory.

After uncompressing, the following installation tree would be established:
C:\clarify\fchoice\ EMU

Updating the Schema

This section details the steps necessary to modify the Clarify database schema for the EMU.

Backup the Database

Prior to making schema changes, it is always a good idea to backup your database using standard backup procedures.

Import the New Schema

To make the required schema changes:

1. Start the Data Dictionary Editor.
2. Choose *Save To File* from the *File* menu.
3. Type **my_db.sch** and press the *OK* button.
4. With a text editor, edit the *my_db.sch* file (it will be stored in the DD Editor directory) and make the changes listed in the *em_schema.sch* file provided in the EMUI install tree.
5. Choose *Apply Changes* from the *Actions* menu.
6. Select the *my_db.sch* file.
7. When asked, press **Proceed**.
8. Review the results presented. If any errors are found, fix them and repeat steps 5-7.
9. If there are no errors, press the **Apply Changes** button.

10. On the next form press the **Upgrade** button.
11. When the upgrade completes, press **Done**.
12. Exit the Data Dictionary Editor

Import the Data Files

There are two files that must be imported into the Clarify system with the Data Exchange tool. These files are:

em_strings.dat	Internationalized strings
em_config.dat	Overall configuration items

To import the file, execute the following command:

```
<path>\dataex  
  -user_name <user>  
  -password <pass>  
  -db_server <serv>  
  -db_name <db>  
  -imp <file>
```

Where: <path> Is the path to the dataex program
<user> Is the system administrator user
<pass> Is the system administrator password
<serv> Is the database server name
<db> Is the database name
<file> Is the name of the file to import

Note: If the <file> is not in the current directory, the path to the directory it is in must precede it.

Note: Each file should import with 0 errors and 0 warnings. If there are any errors or warnings, the dataex.mes file should be investigated for the reason.

Import the User Interface Forms

EMU is provided with a set of new forms.

The new forms to be imported:

- em1947.dat
- em1956.dat
- em2265.dat - For Clarify 6.x and earlier
- em2265-70.dat - For Clarify 7.x and later
- em2266.dat
- em2267.dat
- em2268.dat
- em2269.dat
- em2271.dat
- em2272.dat
- em2273.dat
- em2274.dat
- em703.dat – For Clarify 7.x and earlier

- em703-80.dat – For Clarify 8.x and later
- em707.dat - For Clarify 7.x and earlier
- em707-80.dat – For Clarify 8.x and later

Note: Three of the forms (2265, 703, 707) are provided in multiple versions. Depending on the version of Clarify you are running, you need to import the correct version of the form (and only the one version of the form). For example, if you are running a Clarify 7.x (EFO) system, you would import em2265-70.dat, em703.dat, and em707.dat.

Note: If you already have customized versions of any of the modified forms, perform the following two steps to incorporate the EMU modifications:

1. Add any contextual objects that are present in the EMU version of the form to your form (and any tabs), and
2. Incorporate the code for the modified form into your form code.

The form files are imported with the following command:

```
<path>\dataex
  -user_name <user>
  -password <pass>
  -db_server <serv>
  -db_name <db>
  -imp <file>
```

Where: <path> Is the path to the dataex program
 <user> Is the system administrator user
 <pass> Is the system administrator password
 <serv> Is the database server name
 <db> Is the database name
 <file> Is the name of the file to import

Note: If the <file> is not in the current directory, the path to the directory it is in must precede it.

Note: Each file should import with 0 errors and 0 warnings. If there are any errors or warnings, the dataex.mes file should be investigated for the reason.

Set up Resource Configurations

After all of the form files have been imported successfully, they must be added to the proper resource configuration(s) in the UI (User Interface) Editor.

First decide which user or groups of users should see the new versions of the imported forms. Then add the forms to the resource configuration(s) using these directions:

1. Start the UI Editor.
2. Choose *Resource Configs...* from the *Select* menu (it's File/Open -> resource configuration for Clarify 6.0+)
3. Press the **List** button.
4. Select the resource configuration you want to modify and press the **Open** button.
5. Type EM in the text box to the right of the **Starts With** dropdown list and press the **List** button.
6. Select the forms you wish to add to the resource configuration from the left grid control, and press the **Copy** button.

7. If any confirmation dialogs appear, press the **OK** button to continue.
8. Press the **Replace** button.
9. After the save is completed, press the **Done** button.
10. Repeat steps 4-9 for any other resource configurations you wish to modify.
11. Exit the UI Editor.

Compile ClearBasic Code

You can now compile the supplied Clear Basic code against the forms you have imported.

Before you compile the code, you should edit the `em.dir` file supplied to point to the location of the EMU cbs files. Verify that the Clarify version (the 1st number after the form number for the lines that contain a letter "F") is the same as the form that is saved in the desired resource configurations. Also, the user version (the 2nd string after the "F") should be the same. Comment out any lines that represent forms and code that haven't been added to the database. To comment out a line, put a single quote as the first item on the line.

To compile the code modules, make sure that the code modules (*.cbs) and the directives file (`em.dir`) are located in the same directory. Change directories to that location and enter the following command to compile the code:

```
<path>\cbex -dir em.dir -batch -overwrite
```

Where: `<path>` is the location of the Clarify `cbex` program.

Note: A login may be required if a `clarify.env` file is not in the compilation directory.

When the compilation is completed, look at the `cbex.log` file to check on the status of the compilation. There should be two rows for each file compiled that start with the word **SUCCESS**. If there are any failures, check the above instructions to make sure that your compilation environment is set up correctly.

Global Clear Basic Code

If you already have a global module with an `InitializeApp` routine in it, you must incorporate the code in `em_global.cbs` into the existing one. Clarify only allows one `InitializeApp` routine to exist. If you do not have such a routine, you may simply compile the provided `em_global.cbs` module.

There is also a subroutine that is contained in its own global module. The `em703` form calls this subroutine every time a bulk save is performed from that form. The subroutine ensures that the employee contextual object and the database are kept in sync with each other. It is in a global module because in a multi-tiered Clarify environment, direct updates of the database need to be performed from the `appsvr`. This module gets compiled and loaded into the server, where the `em703` form accesses it. For 2 tier environments, it is compiled into the server global modules normally.

To compile this module on the `appsvr` for flexible deployment, the `em.dir` file can be modified. For module to be compiled on the application server, the subsystem name must be specified as 'appsvr'. There is a directive line included in "em.dir" that has the correct subsystem name.

Environment Variables

On each client machine that is running the Clarify client you should set up the environment variable **LC_ALL**. This variable should contain the locale name that the client desires for displaying any internationalized strings. First Choice Software uses the standard X/Open locale names. By default, US English should be used. The value to use for US English is:

```
LC_ALL=EN_US
```

Configuration Items

The configuration items are stored in the file *em_config.dat*, and may be modified with any text editor. The default values can be modified easily before import. Once the items have been modified, import the configuration file with the Clarify Data Exchange Tool (dataex). See below for more instructions on importing files using dataex.

To import the file, execute the following command:

```
<path>\dataex
  -user_name <user>
  -password <pass>
  -db_server <serv>
  -db_name <db>
  -imp <file>
```

Where: <path> Is the path to the Clarify dataex program
<user> Is the system administrator user
<pass> Is the system administrator password
<serv> Is the database server name
<db> Is the database name
<file> Is the name of the file to import

Note: If the <file> is not in the current directory, the path to the directory it is in must precede it.

Note: Each file should import with 0 errors and 0 warnings. If there are any errors or warnings, the dataex.mes file should be investigated for the reason.

Note: First Choice Software has a Configuration GUI available for system administrators who want to modify the records in the config_itm table. Please contact us for further information about this free utility.

Limitations

There is one limitation that still needs to be resolved. It has been opened as an issue with Clarify. When it is corrected, a patch will be issued for this product.

- The column headers of the custom lists (2265, 2272, and 2273) cannot be set at run time. To localize, you must have a new version of each form per locale.

Internationalization

Employee Manager will be internationalized and localized, using the First Choice Software Inc.'s Internationalization library. Thus, all strings that are displayed on custom forms may be changed to another language/locale, simply by changing an environment variable. Strings that are displayed can also be stored in the database in multi-locale format.

Employee Manager will be localized and internationalized, but it will not be shipped in a translated state. Any translations to other languages are the responsibility of the customer.

There are a variety of environment variables that can be set to control various aspects of the internationalized code. Employee Manager, only two such variables are used.

LC_ALL – Sets all internationalization features to the desired locale

LC_STRING – Sets string handling features to the desired locale

Note: Employee Manager, you may set either variable. If neither environment variable is set, Employee Manager defaults to US English (LC_ALL = EN_US).

Note: First Choice Software uses the standard locale identifiers defined by X/Open. Each individual user may set their environment variables as they wish. Thus, two different users may be seeing Employee Manager displayed in different languages at the same time against the same database.

Note: First Choice Software has a product named the Internationalization Toolkit available for system administrators who want to localize the strings stored in the fc_string table. Please contact us for further information about this utility.

Note: All internationalization is optional. The base Employee Manager product will be shipped in US English. No additional work must be done for that environment.

How to Contact Us

For more information about other First Choice Software, Inc. products, or if you have any questions or feedback about this product, please contact us at:

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