

Lets take a look at the Filters

What is a filter?

A text book definition is; “A pattern through which data is passed. Only data that matches the pattern is allowed to pass through the filter.”

At the bottom of the Reports page, for each report, you will see the Filters section. This will allow you to print a report showing only certain information you desire, instead of all the information that is available. For instance, if you want to print for only the driver whose name is Adams, then by setting a filter, only the driver whose name is Adams will print. You can set a filter to print for only a set range of dates. You can set a filter to print for a particular driver type.

Each report has its own filters section. If you change any of the settings, they will be saved for the next time you print. [Remember: Always check your filter settings before you print.]

The screenshot shows a dark-themed interface with three columns of filter settings. The 'Dates' column has a dropdown menu set to 'Last Month' and a 'Dates Selected' field showing '3/1/1999 - 3/31/1999'. The 'Filter By' column has a dropdown menu set to 'Entire Company' and a 'Driver Types To Include' dropdown menu set to 'All Drivers'. The 'Settings' column has a dropdown menu set to 'Standard' and a 'Sorting And Layout' field set to 'CN'.

Dates and Dates Selected

There are several preset date ranges you can use. For instance, if you wanted to print a report covering the dates for last month. Then by clicking on the down arrow at the end of the Dates box, you would choose Last Month. RapidLog will set the date range in the Dates Selected box to the month preceding the current date.

If you have a specific date range in mind other than the preset date ranges, then type those dates in the Dates Selected boxes. The Dates box will change to Custom.

We recommend you use the preset date ranges, this makes date selection easy and automatic.

Filter By

RapidLog's default setting for this filter is Entire Company. However, you may want to print more selectively. In the Filter By box you can choose one of several filtering options. For instance, you may want to print for a single driver or all the drivers for a single terminal. You can also print for a range of drivers. Just view the list and select the option you want to use.

When you click on Send to Printer, a box will appear asking you to enter the name for the filter. For example, let's say you want to print a report for only Jack Adams. From the Filter By pop up list, you would choose Driver Name as the filter. When you click on Send to Printer, a Select a Driver Name box will appear. Enter the name, last name first, such as Adams, J. This will print any driver whose last name is Adams and his first name starts with a J. With a filter that calls for a range, there will be two boxes, one for beginning of the range, the other for the end of the range.

Driver Types to Include

This filter is to set what driver types you want to print on the report. For example, for a current recap report, it wouldn't make sense to print for terminated drivers. If you set this to Active Drivers, only those drivers who are active for the report dates will print. (Driver types are set on the General Information screen on the Drivers page.)

Settings

Some reports come in different forms. For example, for the Violation List report, you can select between All violations, System violations or Custom.

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Sorting and Layout

At sometime you may want to print in a different sorting and layout order. Here's an example: Let's say you have several terminals under one company and drivers under each terminal and you want to print a driver list. RapidLog starts with the sorting and layout order that will print all the drivers, listed in alphabetical order, for the company as a whole. But instead you want this report to print the drivers in your company by each terminal.

RapidLog starts with the combination of CN. This combination sets the layout order by Company and the sorting order by Name. To change the report to print the drivers by each terminal, you would then change the layout order to Company, then Terminal and the sorting order by Name. This combination would be CTN.

For layout use [C]ompany, [R]egion, [T]erminal, [G]roup, or [M]anager. (You must always start with C.) For sorting use [N]ame, or [I]D number, or [Z]ip code (for mailings).

Some reports have subtotals on them at the bottom of the report. Changing the layout allows subtotals for each level. For instance, if you print for terminals, at end of each terminal will be a subtotal. You can suppress these subtotals by placing a minus sign (-) after a given level.

You can also start a level on a new page. For example, your sorting and layout is set to print by Company and Terminal. You could start each terminal on a new page. To do this, just place a plus sign (+) after the appropriate level. In the above example, you would specify CT+N. Please note that no levels after the + will have subtotals printed.

Let's have a look at Notification and Simple Letters

The more you know about notification and simple letters and how they work, the easier your job will be. This subject should be read carefully and understood well.

Notification Letters

Notification letters are very powerful and are completely automatic. The report looks through all the data on a driver and then prints the report according to what it finds. If he has violations, it will print a message about having violations and then list the violations. If the driver has no violations, it will print a note of congratulations. If the report notices that the driver has a birthday, it will print a happy birthday note and so on.

How Notification Letters Work

How this report deals with printing violations may be the single most important thing to know about Notification Letters. An understanding of this single issue will make a lot of difference in how you handle printing this report.

- 1) When you print Notification Letters, any new violations for your drivers will be printed on the letter.
- 2) Then RapidLog marks those violations as having been printed within the program.
- 3) Then the next time you enter logs and do an audit, new violations will be created.
- 4) When you print Notification Letters after this, only the new violations that were created will print and not the ones printed before. In fact, if you were to try to print Notification Letters right after having just printed them, you would get a blank page.

Simple Letters and How They Work

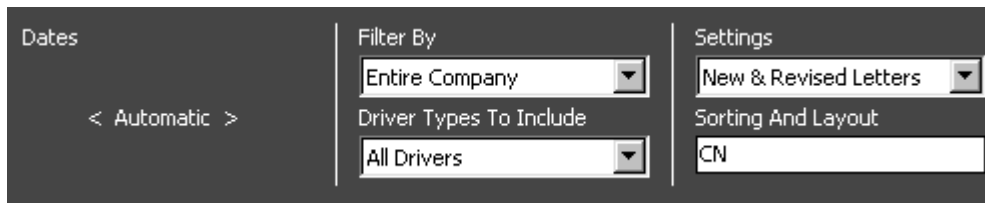
Simple Letters are just that, simple.

1) Whatever data range you give, it will print the violations between those two dates. The report does not care if they have been printed before and it will not mark those violations as having been printed.

We recommend using Notification Letters as the primary means of generating letters to your drivers. RapidLog works best through Notification letters. However, there may be an occasional time you would like to generate a letter outside of the Notification letter method.

The Filter

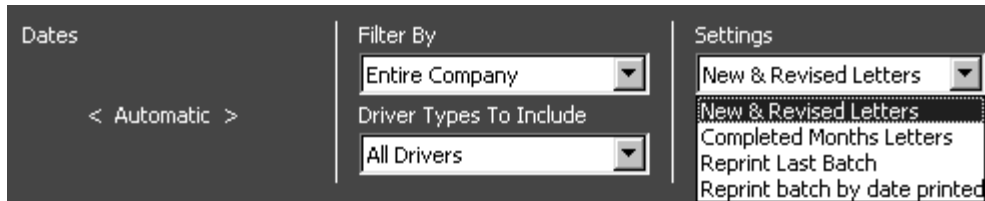
The filter boxes at the bottom of the Notification letters is a little different than the other filter boxes found at the bottom of a report. You'll notice that dates say automatic. Because of the nature of this report, there is no need to select a date range. However, for Simple Letters, you will have Dates available to select.



Dates < Automatic >	Filter By Entire Company Driver Types To Include All Drivers	Settings New & Revised Letters Sorting And Layout CN
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Settings

Under Settings you have a number of choices. Here we have the Settings list expanded. They are each explained below.



Dates < Automatic >	Filter By Entire Company Driver Types To Include All Drivers	Settings New & Revised Letters Completed Months Letters Reprint Last Batch Reprint batch by date printed
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New & Revised Letters

This option is to print any new violations created during the latest audit and or to reprint any letter that has been revised since the letter was last printed. A revised letter will print if any changes have been made to a log after the first letter was printed and that change modified the original letter's violations, the revised letter would reprint.

Completed Months Letters

This restricts the letter from printing until the month is completed for the driver. A completed month is simply the last log for any given month entered into the program. This option can be modified under the Advanced page to work with completed week, half month or quarter also. See the section for the Advanced Page for more information.

Reprint Last Batch

This will allow you to reprint the last batch of Notification Letter printed. If you make no changes to the choices you have for this report, the letters will be duplicated. If you change your choices for this letter such as paragraphs (see The Advanced page of Notification and Simple Letters / Format Button) or what violations you want to appear on the letter, (see The Advanced page of Notification and Simple Letters / Format Button / Violation Class Filters) then the batch will reprint showing these changes. The violations will remain the same.

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Reprint batch by date printed

This will allow you to reprint the same letter from a prior batch. You will be able to enter the batch number for the letter in the filter box. You must first determine the batch number by looking at the Letter History for one of the drivers that would have been printed in that batch.

Enter the date(s) that you first printed the letters. (not the date range the letters covered.)
Dates Printed: 9/1/1999 - 9/30/1999

Filter By: Entire Company
Driver Types To Include: All Drivers

Settings: Reprint batch by date printed
Sorting And Layout: CN

To locate the letter history, you need to click on Drivers tab. Highlight the driver's name that would have been in the batch of letters you want to reprint and then click on Letter History on the left-hand side. You will see the following screen.

Batch	Last Printed	Orig Batch	Orig Printed	From	To	Rev	Reviewed	Needs Printed
03/11/99	3/11/1999 1	RL4-0199	2/22/1999 1	1/1/1999	1/31/1999	2	Y	N
03/08/99	3/8/1999 09	RL4-0299	2/22/1999 1	2/1/1999	2/28/1999	2	Y	N
03/18/99	3/18/1999 0	03/11/99		3/1/1999	3/6/1999	2	Y	N
04/08/99	4/8/1999 02	03/24/99		3/7/1999	3/18/1999	2	Y	N
04/08/99	4/8/1999 02	03/30/99		3/19/1999	3/27/1999	2	Y	N
05/17/99	5/17/1999 0	04/08/99		3/28/1999	4/3/1999	4	Y	N
05/17/99	5/17/1999 0	04/14/99		4/4/1999	4/9/1999	3	Y	N
05/20/99	5/20/1999 1	05/12/99		4/10/1999	5/5/1999	3	Y	N

Under the first column called Batch, you will see all the batch numbers listed for any prior letters printed for this driver. The batch number has been created using the date the letter was printed. When entering this number, it must be entered exactly as you see it here.

Now you are ready to go back to the Reports page, Letters and Notification letters. In the date field enter the batch number in both date boxes.

The Preview

It's important to know that when you preview Notification Letters, the new violations are considered as having been printed. When we print from RapidLog, we send the print job to Windows where it is spooled for printing. RapidLog has marked those violations as having been printed.

When we Preview, the print job has been sent to Windows where it is spooled for printing, but instead of letting Windows send the job to the printer, we have Windows first show us what the print job is going to look like by bringing it up on the screen. Because this print job was sent to Windows, the violations are marked as having been printed.

In order for that set of letters to print, there is a circular button at the top of the Preview screen that must be clicked. The button looks like a printer with paper coming from the top and when you float your cursor over it, the word Print will appear.

The Circular Buttons

The eight circular buttons you see at the top of the Preview screen allow you some viewing control over the image you see on the screen. They, for the most part, are self-explanatory.

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The Print button has an added feature when you press it. It allows you to choose any combination of the previewed pages to print. For instance, if you wanted to print only the 5th page, you would enter 5. If you wanted pages 5 through 8, you would enter 5-8. You would enter 5,8 if you wanted to print pages 5 and 8.

The Advanced page of Notification and Simple Letters

As with every advanced page in the Report Gallery, caution needs to be used when making changes. The changes you make here can change your report and may or may not be to your satisfaction. Just remember the changes you made so that if the need arises, you can change them back.

Each section of the Advanced page is explained below.

Customize Violation Letters

Generate New Letters

As Logs Are Entered

Letters To Print

Smart Letters

New Letters

Revised Letters

Print Settings

Copies: 1

Collate By: Run

Print

Reset Batch

Paragraphs

Format

Generate new letters

This provides you a structure as to when letters are to be printed. By default RapidLog comes set to As Logs Are Entered. Whenever you decide to print Notification letters, whatever violations are new will be printed. This feature does not apply to the Simple letters

In the Filter boxes at the bottom of the main page of Notification Letters, under Settings, you will find on the expanded list Completed Month Letters (see The Filter section of Notification Letters section on page 3). Here, on the Advanced page, if you choose either each week or each half-month or each quarter, it will modify the Settings choice of Completed Month Letters. The wording does not change in the Settings box, only the setting.

Letters to print

New Letters

This will have the Notification Letter print any new violations found since the last printing.

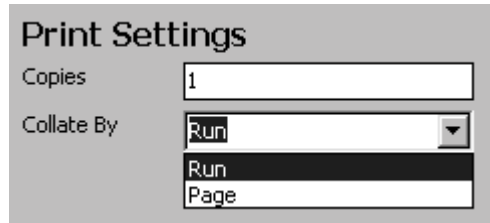
Revised Letters

This will have the Notification Letter print any prior letter where the violation was changed. For instance, let's say a driver brings to your attention that he may not have been in violation as his letter suggests. You

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check the log entry in RapidLog for that day and discover a change needs to be made. This change may change the original violation. If there is a change to the original violation, then this will mark that same letter to print again, to show the change.

Print settings



Print Settings

Copies: 1

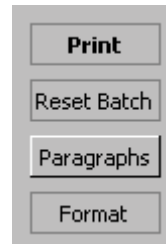
Collate By: Run

Run

Page

Choose the number of copies you want printed. If more than one, choose how to collate the letters. Run will print the entire first copy for all the drivers, then all the next copies for those same drivers. Page will print all copies for one driver and then all copies for the next and so on.

The Four Buttons to the Right on the Advanced page



Print

You can print the Notification or Simple letters from this screen after you have made any changes. It works just the same as the Send to Printer option.

Reset Batch button

This is another way to reset a batch of Notification letters for reprinting. In general, you should not use this function unless instructed to do so by a technician. As described in the Reprint by Date Printed section under The Filter section, the batch code is necessary from the letter history found under Drivers. When returning to the Master List page where Notification Letters is chosen, change the Settings box to New and Revised for this method to reprint properly.

Here is a very important note on this. If you have unchecked the option for printing revised letters, (see Letters to Print / Revised Letters on page 5), this reset option will not perform as expected.

Resetting the batch here marks that batch the same way it marks a revised letter to reprint. In order for a revised letter to print, the choice of Revised Letters needs to be checked. If that option is off, then the reset batch will not reprint. If you have been printing Notification Letters with that option unchecked and now check that option, ALL unprinted revised letters will print along with the batch you wanted to reprint.

The best way to reprint is to use the Settings in the Filters box.

Paragraphs button

All the paragraphs that appear on a Notification and Simple Letter can be customized. On this screen the changes to any of the paragraphs can be made. For more information on how to make these changes see the section on page 8 under Making the Changes to the Notification Letter Paragraphs.

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Letters: Paragraphs			
Opening	DATE: [DATE] [DRIVER] [DADDR1] [DADDR2]	Welcome to [CompanyName]. We regularly send out letters like this one to all drivers. It is our way of keeping us in the safety department in touch with you. Each letter will have different information on it so don't just	Welcome
Violation	[DriverName], in auditing your daily logs, we found the following violations. This is NOT a request for corrected logs. Please return a signed copy of this notice, and explain why you were in violation. If you do not	I noticed that on [DateHatched] you had a birthday. Happy birthday from all of us at [CompanyName].	Birthday
Missing logs	Our records show that we are missing some of your logs. Please review the following dates and turn in a log for each day listed:	We noticed that you have been with us for [YearsEmployed]. Thank you for your faithfulness. We are looking forward to another year of working with you.	Anniversary
Compliance	Congratulations on your violation-free record from [LetterStartDate] to [LetterEndDate]! We at [CompanyName] appreciate your attention to detail and your commitment to safety. The extra effort you put forth makes	Dates here	Dates
Closing	If you have any questions please call [UserName]. Drive safely.		

The following list is a summary of all the paragraphs as a quick reference.

Opening paragraph

This paragraph, by default, comes empty. You can place a message here for all drivers. It prints on every letter.

Welcome paragraph

Prints on your drivers' first letter. This is a nice place to welcome them to the company, explain the purpose of the letter, etc.

Closing paragraph

This paragraph ends the letters with; "If you have any questions..." This prints on every letter.

Violation paragraph

Explaining that violations were found, what kind of follow-up might be required, etc.

Missing logs paragraph

This paragraph is unique. This message can be printed instead of violations for missing logs. There is more information below under the Format Button section, under Missing Logs.

Compliance paragraph

Congratulates drivers for remaining violation free on their last batch of logs.

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Birthday paragraph

Prints when the driver's birthday comes up each year.

Anniversary paragraph

Prints on the driver's annual anniversary with your company.

Dates paragraph

Explains that the documents that are listed are going to or have expired, and need to be updated.

Making the changes to the notification letter paragraphs.

Changing the way the paragraphs read is as simple as typing any text. Just click inside any of these boxes and you're ready to make your changes. In the margins are the names for each paragraph, so make sure you have the right one picked. *Make sure to click on Save before leaving this screen.*

You'll notice some words in [brackets]. These are called placeholders.

Using placeholders

Placeholders allow you to put different information onto the same letter, like the driver's name. Each placeholder relates to a field in the databases. When the letters are printed, the report retrieves the data from the database and fills in the placeholder with the information belonging to the driver it is currently printing.

Here is a list of the placeholders you can use. Make sure you put the words inside the [brackets]. That is how the report recognizes it is a placeholder.

[Age] Driver's age.

[AltID] Driver's alternate ID number.

[AnniversaryDate] Anniversary of hire-date with your company.

[Batch] Batch number for the letters.

[CompanyName] Company's name.

[DateHatched] Driver's birth date.

[DriverFullName] Driver's full name.

[DriverName] Driver's first name.

[GroupName] Driver's group code.

[HireDate] Driver's hire date.

[IDNumber] Driver's RapidLog ID number.

[LetterEndDate] Ending date covered by the letter.

[LetterStartDate] First date covered the letter.

[Manager] The driver's manager.

[ManagerPhone] The driver's manager's phone number.

[ManagerTitle] The driver's manager's title.

[RegionName] The driver's region's name.

[SSN] The driver's social security number.

[TermDate] The driver's termination date.

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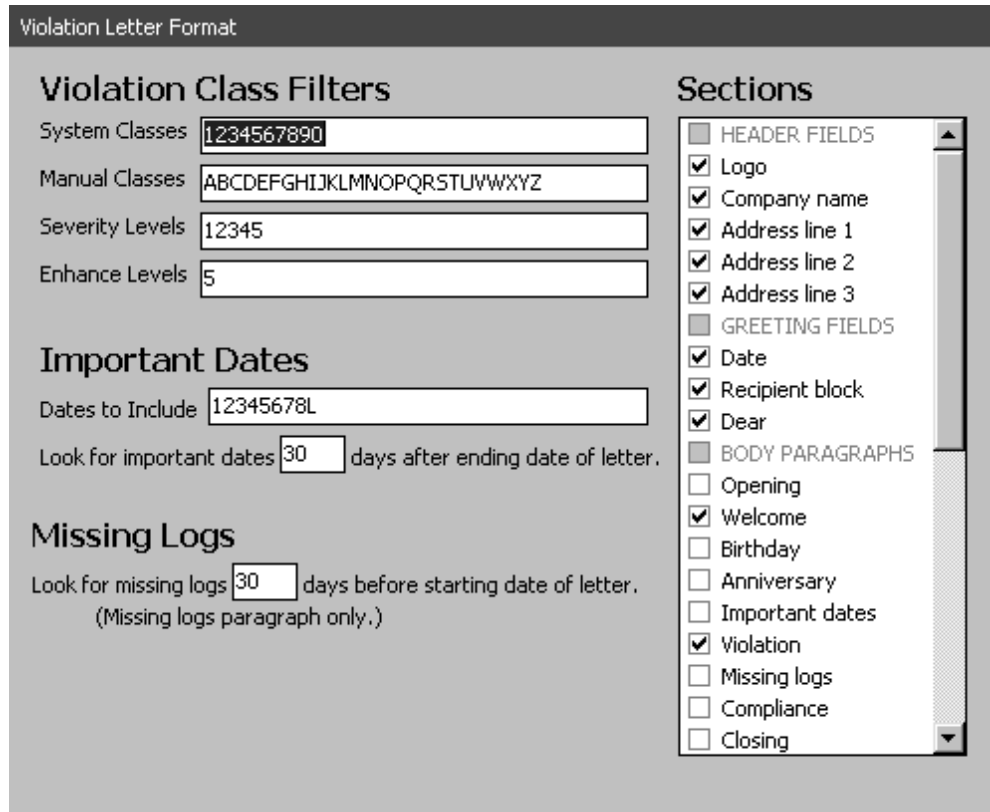
[TerminalName] The driver's terminal's name.

[UserName] The user who is printing the violation letters.

[YearsEmployed] The number of full years the driver has worked for the company (as calculated from the hire date)

Format button

This page has four parts, each listed and explained below.



Violation Class Filters

System Classes: 1234567890

Manual Classes: ABCDEFGHIJKLMN OPQRSTUVWXYZ

Severity Levels: 12345

Enhance Levels: 5

Important Dates

Dates to Include: 12345678L

Look for important dates: 30 days after ending date of letter.

Missing Logs

Look for missing logs: 30 days before starting date of letter.
(Missing logs paragraph only.)

Sections

- HEADER FIELDS
- Logo
- Company name
- Address line 1
- Address line 2
- Address line 3
- GREETING FIELDS
- Date
- Recipient block
- Dear
- BODY PARAGRAPHS
- Opening
- Welcome
- Birthday
- Anniversary
- Important dates
- Violation
- Missing logs
- Compliance
- Closing

Violation class filters

This is a powerful feature of Notification letters. Here you can decide just what violations you want to show on the letters. Each line in the section represents all the violations by number and letter, and their severity level. By removing the numbers and letters of the violations you don't want to print, leaving those you do, you can choose which violations print onto the Notification letters. Each violation has been given a Severity Level. These too can be used to decide what is to be printed.

The Enhance Levels box helps you to decide at which severity level you will begin putting the violation in bold type.

Important Dates

You can choose which of the upcoming important dates you wish to include on the violation letters. These numbers correspond to Important Dates found on the Drivers page. You put the number of days you want to look ahead for in the box in the second line.

Missing Logs

You have the option to choose to have a special paragraph print on the driver's letters that will show any logs he may have late or missing. By default, RapidLog will search for late and missing logs 30 days prior to the first date included in the letter. If you wish to change this, simply change the number in the box. For more information, see Missing Logs under Sections below.

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Sections

The choices you have here for the most part a self-explanatory. However, there are a few that need a little more detail.

Logo. RapidLog by default comes with the RapidLog 5 logo printing on top of the reports. You can choose to not have the logo print or you can have your own company logo to print.

The logo file is called LOGO.BMP. It is located in the folder that holds all the data for your company. You would need to create a BMP file of your company logo, name it LOGO.BMP and replace the original one. For the sake of printing speeds, the file needs to be in grayscale at best, black and white is better. The image should be no more than 300 dpi. Large file sizes for the logo can greatly reduce the speed of printing your letters. If you have a logo you would like modified, we can help you. Call the Sales Department for more information.

Opening. This is intended to allow you the ability to add you own paragraph to the letter to say anything you may want to the drivers. For instance, you may want to give the drivers a holiday message, or maybe send out a one-time general information message to all the drivers.

Important dates. This will allow notice to be given to the drivers of up and coming or past important dates they should be aware of, such as physicals, driver license, etc. The number of days to look forward can be entered. (see Important Dates, above.)

Missing Logs. This is a separate paragraph, apart from the violation paragraph, that shows any logs, late or missing, for the driver.

There is a difference between late and missing. A late log is a log simply not entered onto the Logs page and is not in violation. A missing log is a log not entered in the Logs page and is in violation.

With this paragraph checked, both late and missing will show in it's own paragraph on the letter. The missing log violation will not show in the regular violation paragraph.

However, if this paragraph is not checked, then the missing log violation will show in the regular violation paragraph only.

Manager name. The managers' name that gets printed is the same as the current users', if a manager was not assigned. If you are logged into RapidLog as RapidLog Super User, then that's what gets printed as the manger. Go over to the System page and change the user's full name to the name you wish to see on the letter. And then under the Company page, on the general information page, choose that name for the Driver Manager.

Enable Simple Letters. If you do not see Simple Letters showing under Notification Letters on the list of reports, then it can be enable here. Just put a check in the box.

When I print notification letters, I get only one blank sheet.

There is only one thing that one blank page can mean when trying to print Notification letters. There are no new violation letters to be printed. RapidLog has looked things over and has determined there is nothing to print.

Here are some things to consider. 1) Have you audited? If in doubt, do an audit. 2) Has this batch been previewed and not printed from the preview screen? Check the letter history. 3) Was this job sent to the printer, but there were printer problems and the batch never got to the printer? Again, check the letter history.