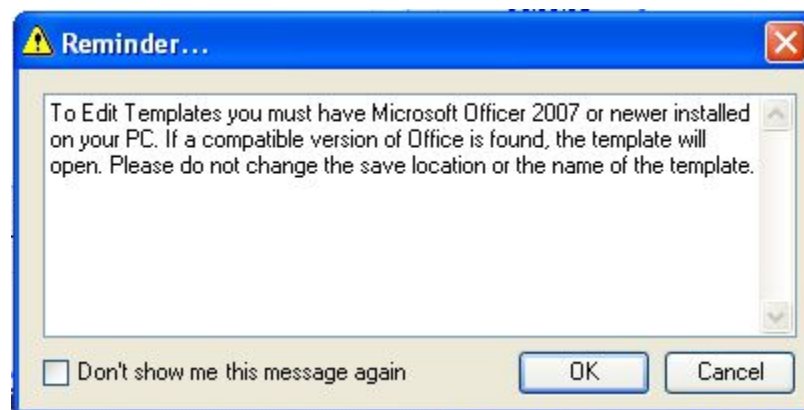


Editing Performance Templates with Office 2003

Overview

HRtrack requires Microsoft Office 2007 or later to customize the **Performance & Discipline** templates that come with the software.

Office 2003 users receive a compatibility warning message when trying to edit a custom template:

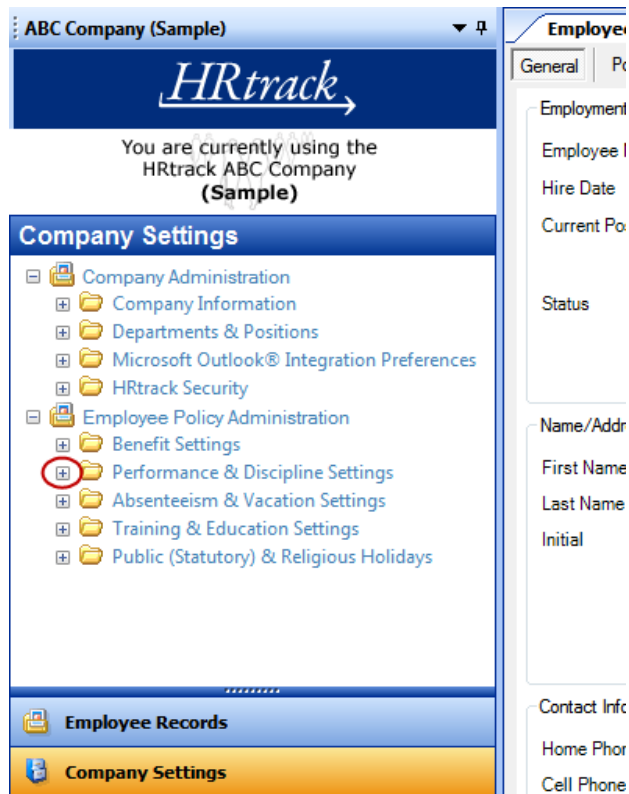


However, there is a workaround for this issue.

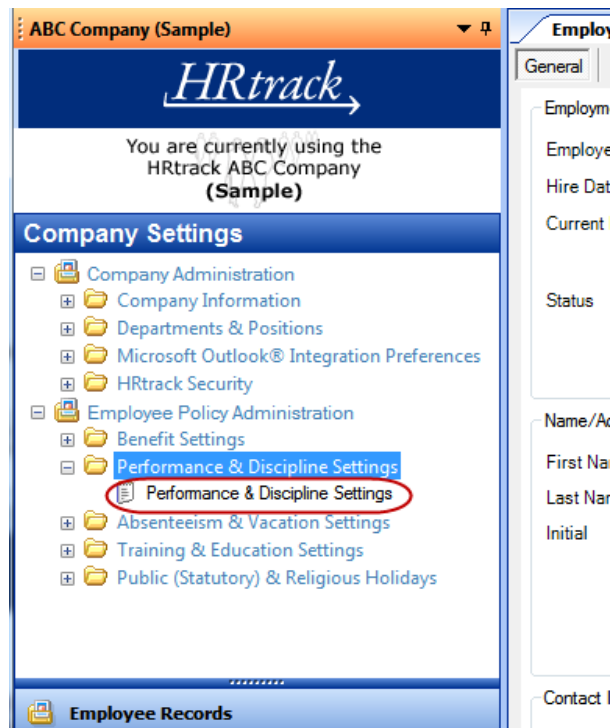
Step 1 — Create a Custom Template

The first step is to create a custom template and modify it for your workplace.

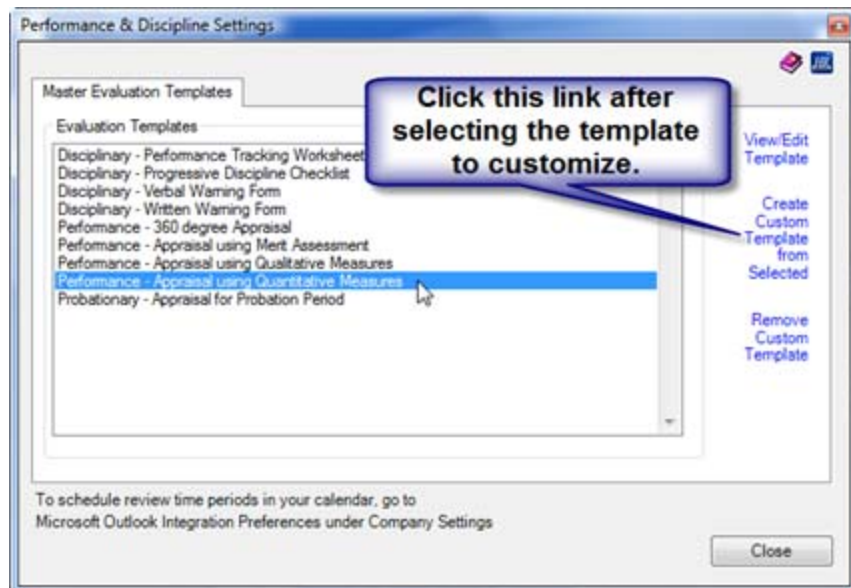
- 1 Open the **Company Settings** module and if necessary, click on the symbol (+) to expand the **Performance & Discipline Settings** folder.



2 Double-click on the **Performance & Discipline Settings** item.



- 3 In the **Evaluation Templates** box, select the "master" template you want to customize, then click **Create Custom Template from Selected**.



This will create a customizable version of the selected template.

However, rather than try to edit the template from within HRtrack, you will need to edit the template within Word.

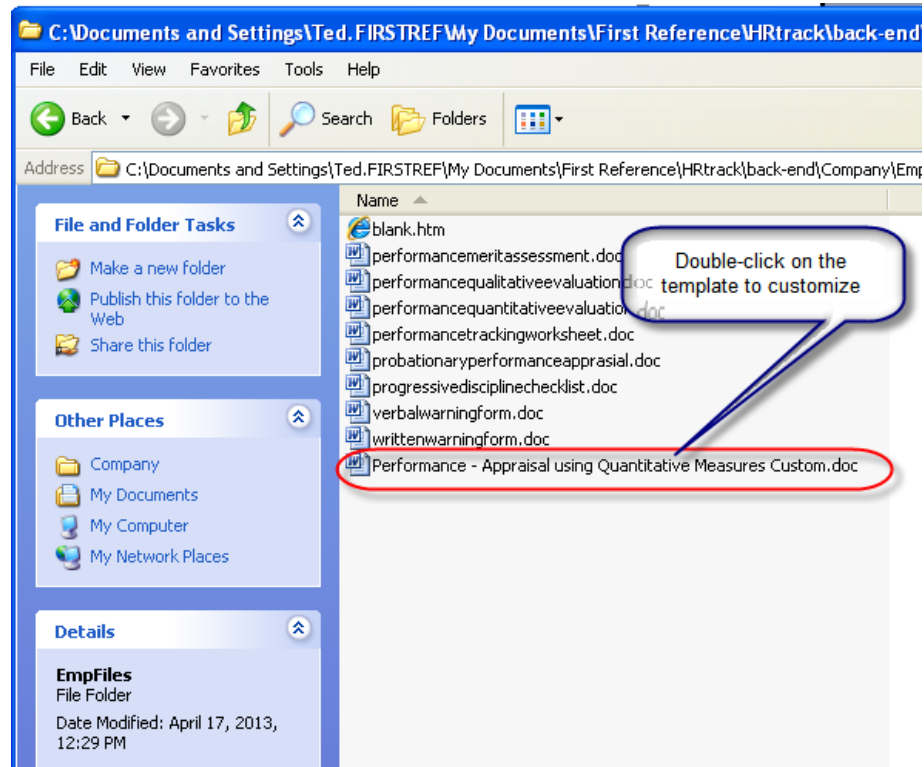
Step 2 — Open the Template in Word and make changes

The custom template will be created in the **My Documents\First Reference\HRtrack\back-end\Empfiles** folder¹ and will have "custom" in the file name.

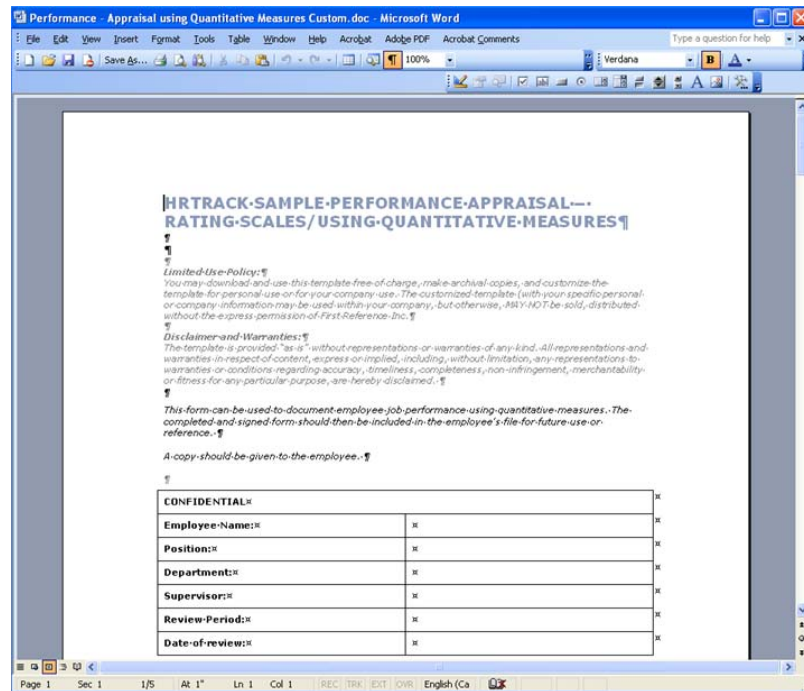
- 1 Browse to the **. My Documents\First Reference\HRtrack\back-end\Empfiles** folder and double-click on the template file to open it in Word.

¹ This is the default data location. If you store your data in another location—a network drive for example—then the file would be created within the Empfiles folder in that location.

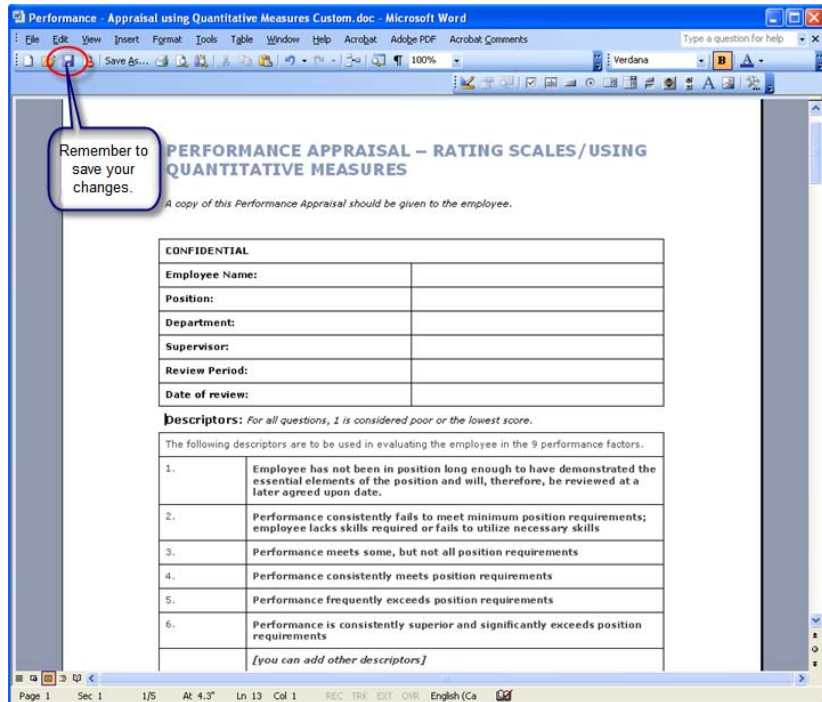
Editing Performance Templates



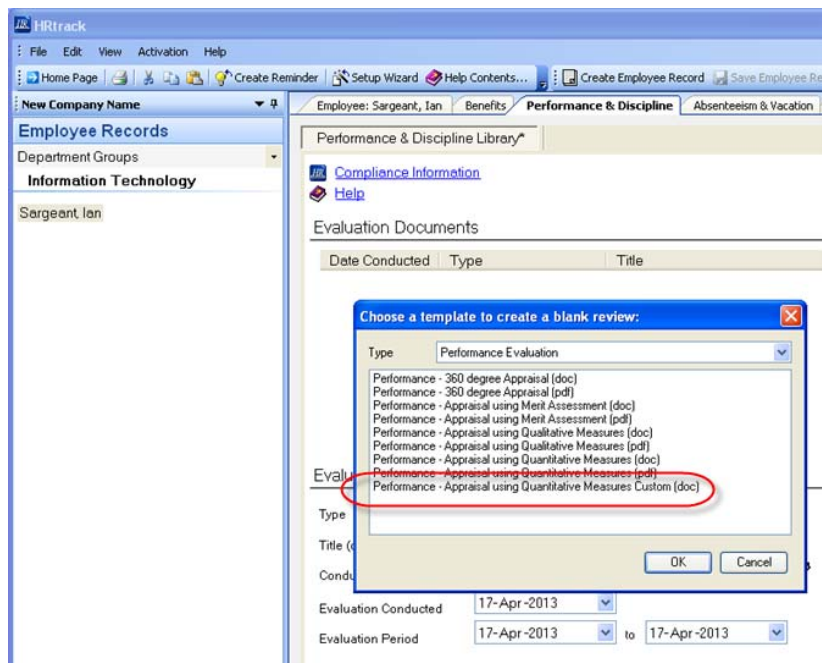
The template will open in Word.



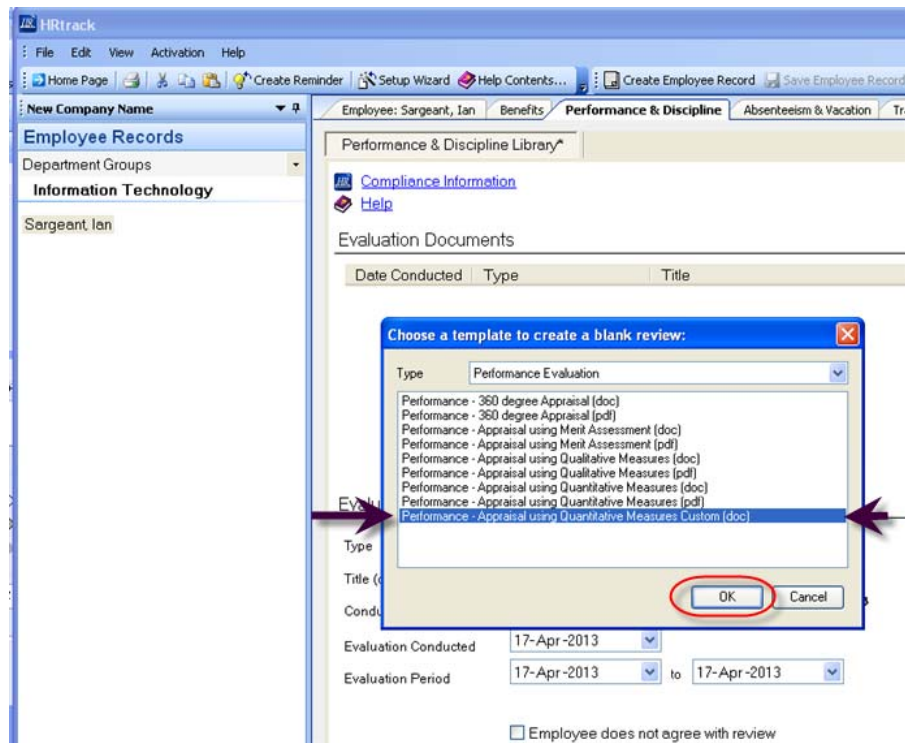
- 2 Edit the template as you would any document in Word and **Save** your changes.



The customized performance template will be now available from within HRtrack.



- 3 Select the template from the list and click **OK**.



The customized Review template will open in Word. Complete the review and save your changes.