What is Unity?

Unity is a software system designed for the purpose of data collection. It can be linked to TIW Workshop™, TIW ALERE, ACCPAC Accounting Systems, Best Software's ABRA Suite, and Visual AccountMate. The Shop Floor module can be used to collect shop floor data and then to create an external posting file (EXTPOST.DBF) to speed up transaction processing in TIW WorkShop. The Time module is used to collect payroll time and attendance data. Which then can be passed to Payroll to automate the time entry process. The inventory module provides for direct inventory transactions such as inventory issues, receipts and physical inventory counts as well as for printing bar-coded inventory labels.

Data is collected using Bar Code Data collection Hardware, such as a PC or Microsoft Windows™ based handheld PC with a barcode scanner, or the ComputerWise data collection terminals. This data is directly input (live) into the Unity Data files. Unity processes the data matching in and out transactions and validating the information.

Software Technical Support For Unity

Software support for Unity can be found by contacting your local software reseller or you can contact Ticomix, Inc.

Ticomix, Inc.
Website: http://www.unitydc.com
E-Mail: support@unitydc.com
Fax: 815.636.1480
Telephone: 815.636.1499

Installing Unity on the Server

For CD-ROM installation, insert the Unity CD in your CD-ROM drive. The CD should automatically start in most systems. If it doesn't start automatically follow these steps:

1) Go to "Start"
2) Select "Run"
3) Type D:\SETUP.EXE and press the "OK" button.
   (Substitute the appropriate drive letter where you see "D")

Follow on screen instructions. The installation to the server can be done from any workstation. It is unnecessary to perform a workstation installation then on this PC.

Installing Unity Client on the Workstation

For the workstation installation, you will not need the Unity CD in your CD-ROM drive. The installation program is run from the network after the software is installed to the server. You must do the server installation first. Follow these steps to do the client installation:

1) Go to “Start”
2) Select “Run”
3) Type F:\UNITY\CLIENT\CLIENT.EXE and press the “OK” button.
   (Substitute the appropriate drive letter and path where you see “F:\UNITY\”)

Follow the on screen instructions.

Set Up for Unity

Once you have installed Unity and run it for the first time, the setup screen will come up automatically. This screen can be accessed later from the File menu by clicking on the Setup option.

Setup is the area where you define your company(s) for Unity. Each company will be linked to a specific TIW/accounting system company.

The Unity data path is the location where you will store this company's Unity data. Each company will have a separate directory.

WARNING: Do not use the \DATA\ directory under your main Unity directory to store company data. This directory is reserved for unity system data.

Shop Floor Module Setup

If the Shop Floor Module is installed, the manufacturing system field allows you to select whether you will be linking to TIW WorkShop, ACCPAC Pro Manufacturing, or if the Shop Floor module will be operating stand alone (None). When linking to TIW WorkShop or ACCPAC Pro Manufacturing select it in the drop down box, when operating stand alone be sure to select "None" as the manufacturing system. When linking to a manufacturing system, enter the path where your manufacturing system directory is located in the Manufacturing System Path Field. Next you will need to click the search button next to the Manufacturing Company selection box to choose the correct company to connect to.

Note to developers: *When linking to TIW WorkShop versions before 6.5A, Unity automatically adds a new field to the EXTPOST.DBF table in the TIW company data directory. It adds an numeric 11 character field called tranno.*

Remember to only link to a manufacturing company once. There should be a one to one relationship between your manufacturing system and Unity companies.

For WorkShop users, if you do not have the TIW Cost module, you can optionally check the "Use Standard Labor Rates to use the $STANDARD employee's rate instead of the actual employee rate when posting labor transactions. Please see the "Maintain Employees" section of Chapter 4 for more details.

The "Split Time on Overlapping Labor" feature will divide the time between multiple work orders/operations when an employee is clocked into more than one operation at a time. This Split Time feature works with any labor transaction (transaction codes that begin with "L"). The Split Time feature should be used with caution, though. It should be understood that the system is not going to calculate the actual time as recorded by the employee. It will adjust the time based on the number of concurrent jobs and then divide the time evenly between those concurrent jobs. For greatest accuracy it is recommended that the Split Time feature is not used, and rather the employees clock in and out as they change from one operation to the next. Here is an example of how the Split Time feature might work:

Work Order #	Operation #	Clock In	Clock Out	Actual Time	Adjusted Time
1039	30	0800	0900	1.0	.71
1056	20	0830	0930	1.0	.46
1092	50	0845	0945	1.0	.58

The above example shows 3 different work orders where an employee worked and that employee's times overlapped. The time in the chart above is shown an hours. You'll noticed that the recorded time in this example for all 3 operations was the same, one hour. Although with the Split Time feature each operation would have a different adjusted time based on how much overlap it has with the other two operations. You'll notice that this employee clocked into work order 1039 at 0800 and was only clocked in to that work until 0830 when the employee clocked into work order 1056. So the first half hour of time was given totally to work order 1039. For the next 15 minutes the employee worked on both work order 1039 and 1056. This 15

minutes was divided between the two orders adding an additional .125 hours to work order 1039. Finally from 0845 to 0900 the employee worked on all 3 operations simultaneously. This resulted in that .25 hours being divided 3 ways between the 3 operations. Thus resulting in an adjusted time of .71 for work order 1039.

"Validate IP Quantities" should be checked, if you are linking to TIW WorkShop and you wish for Unity to reject IP transactions that exceed the projected quantity on the work order. For example if the projected quantity on a given work order in TIW WorkShop was 10 pieces. The maximum IP quantity for any operation on that work order would not be allowed to exceed 10 pieces with this option checked. The system would total the previously posted IP transactions for that operation step and for that work order and add them to what is currently being posted and then compare that quantity to the projected finish quantity of the work order in TIW WorkShop. If the IP transaction would cause an exceeding quantity of IP than a warning message is generated for that transaction stating that the "IP Exceeds Projected Quantity".

To link to the HourGlass GDCS™ data collection system, you must check the "Use GDCS import routine?" box. Then, enter the path where the GDCS Data is stored in the GDCS Path field. (i.e. F:\HOURGLAS\GDCS\DATA) When this option is used, the Import Transactions, imports the TRX.DTA file from GDCS path instead of the DATA.TXT file which would be in the Unity company directory.

Time Module Setup

If the Shop Floor Module is not installed you need to specify the path to your accounting software system directory. Enter the path where your accounting software system directory is located in the Accounting System Path Field under the Accounting tab. Next, you will need to specify the accounting system company you wish to link the time module to.

Remember to only link to an accounting system company once. There should be a one to one relationship between your accounting software companies and Unity. Also, note that if the Shop Floor software is installed you will not need to select a company or enter the Accounting System Path. The software will do this automatically.

The payroll export file selection allows you to choose whether or not you wish to only create a .DBF table when creating the external posting file or if you would like to also create an ASCII text file at that time, or you have the option to export to ABRA Payroll. The flat ASCII text file that is created can be used for posting into payroll systems such as Ceridian.

The Department pull-down field allows you to select which Organizational level will be used as the department designation for employees. You decide which of the 5 Org. Levels you would like to use to hold the department. This Org. Level will then be used during DT (Department Transfer) transactions in the Time Module.

The payroll company number and export file name refer to the ASCII text file that would be created when using the ASCII text file export option. The company number gets referenced in the file and the export file name is the name used when creating the ASCII export file. The payroll company number is also used to specify which company number ABRA Payroll transactions should be posted to when exporting to ABRA Payroll. When exporting to ABRA Payroll you will need to enter the 3 character ABRA company code in this company number field.

Finally, if you will be creating an ASCII file when creating your external posting, you must specify the path in the Export File Path field. If you are importing/exporting to ABRA you will specify your ABRA data path in this field. A typical ABRA data path would look something like this:

```
G:\ABRASUITE\PROGRAMS\DATA\
```

Inventory Module Setup

If the Shop Floor Module is not installed you need to specify the path to your accounting software system directory. Enter the path where your accounting software system directory is located in the Accounting System Path Field under the Accounting tab. Next, you will need to specify the accounting system company you wish to link the time module to.

Remember to only link to an accounting system company once. There should be a one to one relationship

between your accounting software companies and Unity. Also, note that if the Shop Floor software is installed you will not need to select a company or enter the Accounting System Path. The software will do this automatically.

In the field labeled, "Store Name for Use With SP Transactions", you will need to enter the name of the default store where picking transactions (SP) will move inventory. This store is a temporary place where inventory is held after it has picked from the stock locations prior to being shipped with an SO transaction. Please see the inventory transactions help for more information.

Deleting a Company

The delete button on the Setup screen allows for deleting a company. As a safety measure, deletion of the currently selected company is not allowed. If you wish to delete a company you must first select another company by using the Select Company function from the File menu. After choosing to delete a company, you can optionally choose to destroy that company's data directory.

WARNING: Selecting the Destroy Data option deletes all files in this company's data directory specified in the Unity Data Path field. It then removes the directory after the files have been deleted. Please use caution while using this function of Unity.

See Also

Terminal Emulation Settings
Time Transactions
Inventory Transactions

Searches

One of the features built into the Unity system is our incremental search utility. The incremental search actually looks for the item you are searching for as you type.

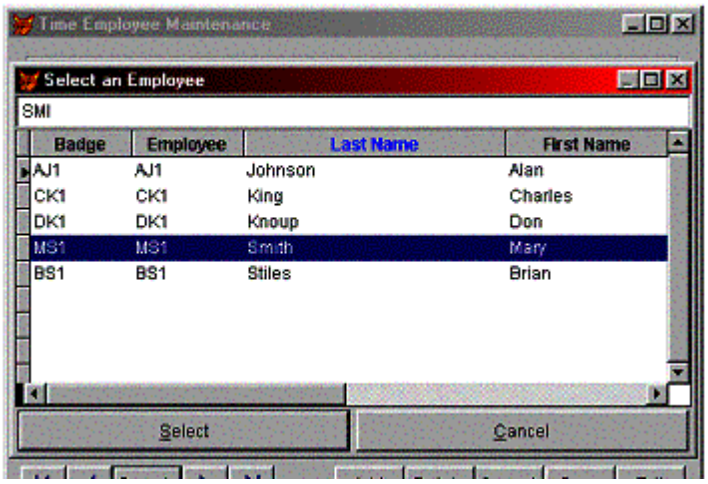


Figure 1.1 Search Utility

You can change the search order by clicking on the column heading. Once you have found the record you want. You can double click the item, press enter while the item is highlighted, or click on the Select button to choose that record.

Pop-Up Calendar

There is a handy pop-up calendar that can be accessed by Double-Clicking on any date field throughout the Unity system. The pop-up calendar gives the user a month by month view. You can change the month that you are viewing by clicking on the month drop down at the top right of the screen and then selecting a month. You can change the year by clicking on the year drop down at the top right of the screen and then selecting a year.

Clicking on any date on the calendar will select that date. To quickly move to the current day's date, click the "Today" button at the bottom of the screen. To exit without selecting a date, click the "Exit" button at the bottom of the screen. To select the date chosen click the OK button and you will be returned to the original date field.

Selecting a Company

When more than one company is setup, you have the option of selecting a company when you first start Unity. Once you have started Unity you may change companies by choosing the “Select a Company” option from the File menu.

Security - User Login

Unity includes user level security which requires users to log in with a distinct user name and password. The login window appears when the program is started and can be accessed again by choosing "Login" from the File menu. User login ID always defaults to the current windows login name. Passwords are case sensitive, so take care when entering the password in the login screen.

To add new users, you will find the “User Maintenance” option under the File menu. User names are entered in all upper case letters. The password, however, is case sensitive for added security. So, if the password is entered in user maintenance in all lower case, all upper case, or mixed case, than it must be entered that way when logging into the system.

See Also

User Maintenance - Security
Change Password - Security
Clear Active Users
Display Active Users

Security - Change Password

Unity users can change their user password at any time by choosing Change Password from the File menu. Users must first enter their current password. Next the user needs to enter their new password and then re-enter the new password to confirm the change. Passwords are case sensitive, so take care when entering the password in the change password screen.

See Also

User Maintenance - Security
User Login - Security
Clear Active Users
Display Active Users

Security - User Maintenance

Unity includes optional user level security. To turn on the user level security simply add users through user maintenance. You will find the “User Maintenance” option under the File menu. User names are entered in all upper case letters as you type.

The password, however, is case sensitive for added security. So, if the password is entered in here in all lower case, all upper case, or mixed case, than it must be entered that way when logging into the system. Once a user has been created the password field is disabled so that the password is not accidentally changed. To change a user's password, the user should log in and then go to the File menu and choose Change Password. If you want to reset the password to blank, this can be done from the user maintenance screen by clicking the reset button next to the password field.

The password life field can be used to force the user to change their password after a specified number of days. If you wish for the password to expire than enter a number in this field for the number of days. Expirations can be turned off by setting the life to zero or by simply blanking the field. If a user attempts to log in after the password has expired, the software will force the user to change their password before it logs them in.

There are 3 levels of access. The first is Unlimited which gives the user the ability to access, view or change information. The next is Read Only, this option gives the user the ability to access or view information only. Read Only access does not allow changes, additions, or deletions. Finally there is No Access which limits the users access to the given function. You can set up access levels for the following features of Unity:

System Module

User Maintenance
Company Setup
Access FoxPro
Terminal Emulation
Modify Reports –Used to protect the Modify Report and the Modify Label options.
Import Data
System Messages
Open Transactions

Shop Floor

SF Transactions - Includes items in the Shop | Transactions and Shop | Maintain menus.
SF Work Orders - Work Order Screen (Shop | Maintain Menu)
SF Employee Maintenance - Includes the Employee and Organization Levels Maintenance.
SF Labor Rates - Protects the Employee's Hourly Rate.
SF Reports – Includes all reports in the Shop/Reports menu.

Inventory

IC Transactions - Includes items in the Inventory | Transactions and Inventory | Maintain menus.
IC Employee Maintenance - Includes the Employee and Organization Levels Maintenance.
IC Reports – Includes all reports in the Time/Reports menu.

Time

TI Transactions - Includes items in the Time | Transactions and Time | Maintain menus.
TI Employee Maintenance - Includes the Employee and Organization Levels Maintenance.
TI Reports – Includes all reports in the Time/Reports menu.
TI Access Level - Determines whether or not the user will see all employees or just the ones they supervise within the time module. Unlimited is for allowing access to all employees, while supervisor will limit acces to only those employees who this user is designated as their supervisor. See employee maintenance for more information.

Pocket Terminal

Label Size - Specifies default label size for printing labels from the pocket terminal for this user.
Label Printer - Specifies default printer to be used for printing labels for this user.

If you decide later you wish to disable the user level security, simply delete all of the users through the user maintenance screen. Once all the users are deleted, you will no longer need a user ID or password to log in. Please note that without security in place users have unlimited access to all functions within the Unity system.

See Also

Clear Active Users
Display Active Users
Employee Maintenance

Pocket Terminal Settings

Some of the aspects of the pocket terminal screen can be changed by the use of the Pocket Terminal Settings screen. The options on this screen determine the behavior of the pocket terminal screen for certain transactions as well as blocking/allowing specific transactions from posting from the Pocket Terminal.

General Settings

By checking the boxes you tell the system to prompt for that piece of information when appropriate. Keep in mind that you can change these settings at anytime by coming back to the pocket terminal settings screen later.

The Transaction Again Terminal Emulation Shop Transactions Time Transactions Inventory Transactions

Open Transactions

The Open In Transactions screen shows all of the current “In” transactions for the selected company where the employee has clocked in, but has no yet clocked out. This screen is a tool which can be used a couple of different ways. One use of this screen is to visually see which work orders are currently being worked on and which employee’s are working on them. It gives a quick snapshot of what your employees are currently working on. Another use of this screen is to find errors where employee’s clocked into a job but never clocked out.

Additionally, this screen can be used to quickly clock out of a job which you are clocked into. For example if you did a LCI transaction in the morning and wanted to clock out of it write now. You could find the LCI transaction displayed on the list and double-click on it.

By double-clicking on any transaction on this list you will open the clock out screen. This screen appears with a default of the current date and time. If you wanted to post the LCO at the current date and time, you would simply click the OK button. Otherwise you can optionally change the clock out date and/or time on this screen and the press the OK button.

Information displayed in the Open In Transactions grid can be filtered by checking the appropriate boxes at the top of the screen and then clicking on the refresh button in the lower left corner of the screen. You may filter the date by the following transactions: LCI, LMI, LII, LSI, LDI, UWI, ID. The data can also be further filtered by transaction date by entering a starting and ending date.

See Also

Shop Transactions
Time Transactions
Inventory Transactions

Packing And Reindexing

"Packing and Reindexing" is done by selecting the Pack and Reindex option from the File/System Tools menu. Packing and Reindexing removes deleted records and rebuilds index files for the currently selected Unity company's data tables. Please see the data dictionary in Appendix A of the User's Manual for more information regarding data tables.

This is a single user function. You MUST be the only user in Unity when using this utility.

Note to developers: Unity will delete the compact index file (.CDX) for each table and then re-create that index file during this Pack and Reindex process.

See Also

Active Users

Active Users

By selecting Active Users from the File/Users menu you can see which users are currently logged in and the time that they logged in. This report can also be printed by clicking on the printer icon.

See Also

Security - User Maintenance
Clear Active Users

Clear Active Users

If a user abnormally exits the system it may appear on the Active Users display that they are still logged in or that they are logged in more than once. To clear all users from the active list choose Clear Active Users from the File/Users menu. There should only be one person in the system when using this option.

See Also

Security - User Maintenance
Active Users

Toolbar Maintenance

From the view menu you can access Toolbar Maintenance. Unity allows for customizing the toolbar for each individual user. First log in as the desired user. Next you choose Toolbar Maintenance from the view menu. Now you can select the options you wish to see on the toolbar by simply checking the box in front of the option.

See Also

Security - User Maintenance
Active Users

System Messages and Auto Shutdown

System Message Maintenance can be found on the File menu by choosing File | System Tools | System Messages. In the System Message Maintenance, you can type a message and then click OK and your message will appear on the screen in every copy of Unity that is running. This handy tool can be used for such things as alerting all of your Users of a system maintenance activity, like a shutdown.

The Auto Shutdown is enabled by checking the "Force Shutdown" option. By checking this box, Unity will be shutdown automatically at the specified time. Keep in mind the time here is in 24-Hour format, so for example 3:00 pm would be 15:00.

When the automatic shutdown occurs, users with Unity running will see a brief message appear on their screen to indicate that Unity will be shutdown momentarily. The shutdown will close all screens and exit the user out of the software. If the user has anything to save they should do so immediately as the shutdown will occur quickly following the warning message.

Modify Report

This option which is available under the File/System Tools menu can be used to modify the reports in Unity. Please note that knowledge of the Visual FoxPro

Modify Label

This option which is available under the File/System Tools menu can be used to modify the labels in Unity. Please note that knowledge of the Visual FoxPro? report writer is required for this function. Please refer to the Microsoft Visual FoxPro documentation for more details.

See Also

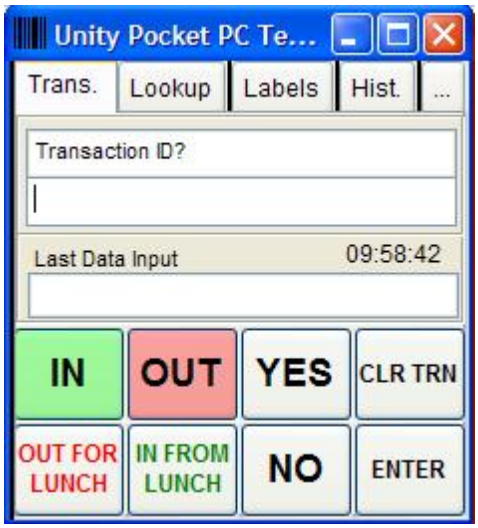
Modify Report

Access FoxPro

This option allows the operator direct access to the FoxPro program. Different levels of operation are available depending on whether the FoxPro Runtime version is being used or the FoxPro Development package has been installed. This option is found under the File/System Tools menu. Please refer to the Microsoft Visual FoxPro™ documentation for more details.

Warning *- Extreme caution should be used with this function. Only qualified operators should have access to this feature.*

Pocket PC Terminal



The Pocket Terminal screen is designed to operate on a PC or a handheld device such as a Pocket PC, Windows Mobile, or similar device. This program was designed to fit on the small screen of portable devices. To use the software on a handheld device, you should first install the software on a terminal server and then connect the handheld device to the terminal server though the terminal services client. Users can easily use the pocket terminal for the purpose of collecting data, looking up item locations, printing labels, and more.

The IN, OUT, OUT FOR LUNCH, and IN FROM LUNCH buttons are used for their corresponding time and attendance transactions (ID,OD,OL,IL). The YES and NO buttons can be used to answer questions that are displayed, such as “Transaction Again?” Furthermore, the CLR TRAN button can be used to cancel a transaction which is currently being input. See the following sections for more information about the transactions which are supported by the Pocket Terminal; Shop Transactions, Time Transactions, Inventory Transactions.

Most input through this screen is validated according to it's specific values. For example, only the supported transaction codes are accepted when asking for "Transaction ID". Another example of this would be that only active employee badge numbers would be accepted when it prompts for an employee badge. When prompted for a date value, the following formats are acceptable:

MMDDYY
MMDDYYYY
MMYY
MM/DD/YY
MM/DD/YYYY

Pocket Terminal can be run from outside of the Unity product as a stand-alone application. A file entitled UNPOCKET.EXE can be found and run from the directory where Unity is installed in order to run the application stand-alone. You can also optionally start the pocket terminal by clicking on the Pocket Terminal icon on the toolbar within the Unity Data Collection Suite.

To learn more about the Lookup, Labels, History, and Default Settings options for the Pocket Terminal screen please click on the links below.

Lookup

Labels

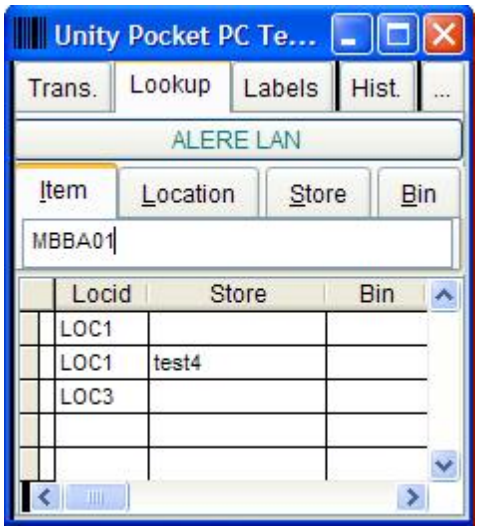
History

... (Default Settings)

See Also

Terminal Emulation Settings
Shop Transactions
Time Transactions
Inventory Transactions
User Maintenance (Security)

Pocket PC Terminal - Lookup

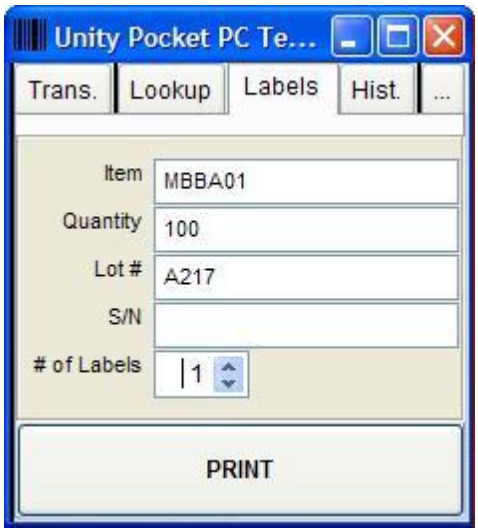


The Lookup page is there to provide the user with a way to look up the location(s) for a specific item or to lookup a specific location to see which items should be located there. At the top of this page of the Pocket Terminal screen is a button. In the example screen shown you will see the button displays a company named "ALERE LAN". Clicking this button allows for selecting a different company in Unity. The row of tabs below this button titled; Item, Location, Store, and Bin are used to look up each of those elements. So clicking of the appropriate tab or typing the letter associated with that tab will enable the search field for finding that particular information. So to look up an item, you might click "I" and then type an item number in the search field. In the example above the item number "MBBA01" was entered, thus showing the grid below it with 3 locations shown.

See Also

Pocket Terminal
Pocket Terminal - Labels
Pocket Terminal - History
Pocket Terminal - ... (Default Settings)
Pocket Terminal Settings

Pocket Terminal - Labels

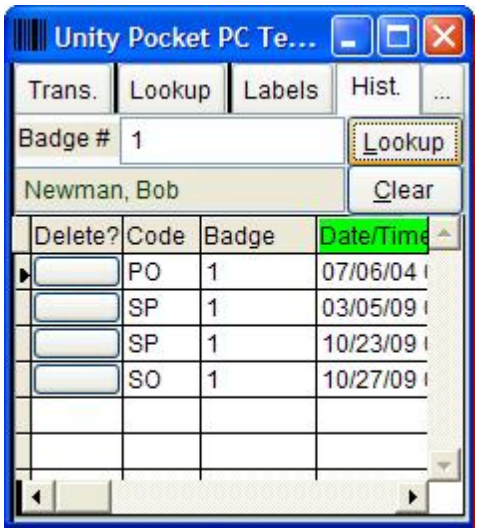


The Labels page provides the user a way to print labels from the pocket terminal screen. The user can specify item number and then optionally enter quantity, lot number, and serial number. To print more than one copy of a label, the user can specify the # of labels desired with that field. Also, see Pocket Terminal-Default Settings to learn more about how to select the printer used for printing the labels.

See Also

Pocket Terminal
Pocket Terminal - Lookup
Pocket Terminal - History
Pocket Terminal - ... (Default Settings)
Pocket Terminal Settings

Pocket Terminal - History



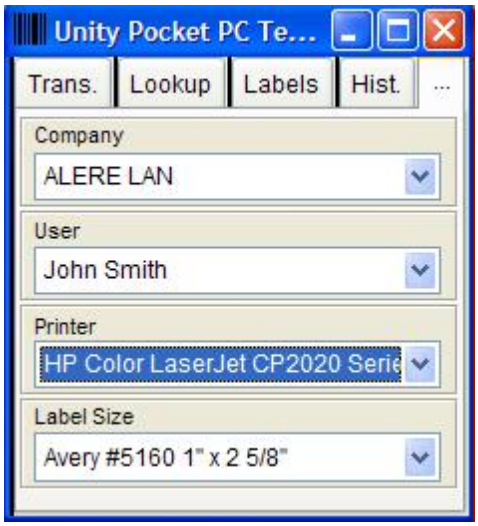
As you can see the history tab of the Pocket Terminal shows the transactions for a selected employee. You can type or scan the employees badge number and then simply click the lookup button to display all open transactions (not yet posted) for this employee. Clicking on the clear button will clear the badge number and data displayed in the grid. If the user wishes to delete a transaction they can do so by clicking the button in the delete column of the grid for the transaction they desire to delete.

See Also

Pocket Terminal
Pocket Terminal - Lookup
Pocket Terminal - Labels
Pocket Terminal - ... (Default Settings)
Pocket Terminal Settings

Pocket Terminal - Default Settings

... (Default Settings)



This default settings tab shows the default company which is used for label printing and look up functions. It also shows the user that is logged in as well as the default printer and label size. These defaults actually are taken from the user maintenance inside of the Unity Data Collection Suite software. Please see the user maintenance for more details on setting defaults.

See Also

Pocket Terminal
Pocket Terminal - Lookup
Pocket Terminal - Labels
Pocket Terminal - History
Pocket Terminal Settings

Understanding Shop Floor Transactions

Unity Shop Floor transactions are very similar to the transactions in TIW WorkShop. Familiarity in the TIW WorkShop transactions will be helpful in understanding the Unity Shop Floor transactions. The labor transactions for Unity vary from the standard TIW transactions by adding an “I” or an “O” to the end of the code (i.e. LCI, LCO, etc.). The “I” stands for In and the “O” stands for out.

Additionally, there are several new transactions; LCQ and UWQ. The LCQ transaction is a combination of an LCO and IP transaction. When the external post file is created by Unity, it creates a separate LC and IP transaction in the EXTPOST.DBF for each LCQ transaction (and matching LCI). The UWQ transaction is a combined UWO and IP transaction. When posted to TIW's EXTPOST.DBF external posting file, Unity create a separate UW and IP transaction. The new LCA transaction is used to close all open labor cycle transactions for the given employee. When the employee posts an LCA the system then creates LCO transaction for each of the currently open LCI transactions which do not have an LCO yet. In essence this cycles the employee out of any jobs they were cycled into with an LCI.

Also, Unity automatically creates a WorkShop OS transaction if one has not already been created for a given Work Order and Route Step. If a transaction other than OS is entered, Unity verifies that the step has been started. If it has not been started an OS transaction is posted to the given Work Order and Route Step.

Transaction Types	
FG	Finished Goods
FX	Undo Finished Goods
IP	In Process
LA	Labor All
LCA	Labor Close All
LCI/LCO	Labor Cycle In/Out
LDI/LDO	Labor Downtime In/Out
LII/LIO	Labor Idle In/Out
LMI/LMO	Labor Maintenance In/Out
LSI/LSO	Labor Setup In/Out
LCQ	Labor Cycle Out with Quantity (IP Transaction)
MA	Material Issue All
MB	Material Backflush
ME	Material Everything
MI	Material Issue
MP	Material External Process
MR	Material Return to Stock
MS	Material Scrap
MU	Material Undo Issues All

MX	Material Undo Issue
OC	Operation Complete
OF	Overhead (Fixed)
OS	Operation Start
OV	Overhead (Variable)
UWI/UWO	Usage Work Center In/Out
UWQ	Usage Work Center Out with Quantity (IP Transaction)
XQ	Change Quantity

Run Monitor

By selecting the Run Monitor option from the Transaction menu, you invoke the data collector download monitor. This option works with the Videx LaserLite Pro™ data collection units. It continually checks the attached base stations for data to be downloaded. As soon as one of the data collection units is inserted in the base station the data is transferred from the data collection unit to the PC.

See Also

Load OS and Application

Import Transactions

Importing Transactions

By running the monitor, a text file is created called DATA.TXT. The system downloads this data from the Videx Laser Lite Pro. The transaction import function brings the transactions from this ASCII text file to the Preview External Post table for Shop Floor transactions. It brings time transactions into the Time Transactions table and inventory transactions into the Inventory Preview Post file. If the Shop Floor module is installed, the system then attempts to build the External Post file based on those transactions.

Previewing External Post

The Preview External Post option can be found on the Transaction menu. All invalid transactions found by importing or creating external post can be reviewed and edited here. You can also add new transactions by hand here. Once you have corrected invalid transactions you can try to build the external post again by using the Create External Post option from the transaction menu.

The Preview External Post screen has been designed to show only the fields necessary for the specific transaction. So once you have selected a transaction or if you change the transaction code on an existing record, you will notice that the visible fields may change. You will also note this if you move from one record to the next. It will only show those fields that would be necessary for the specified type of transaction.

See Also

Understanding Shop Floor Transactions

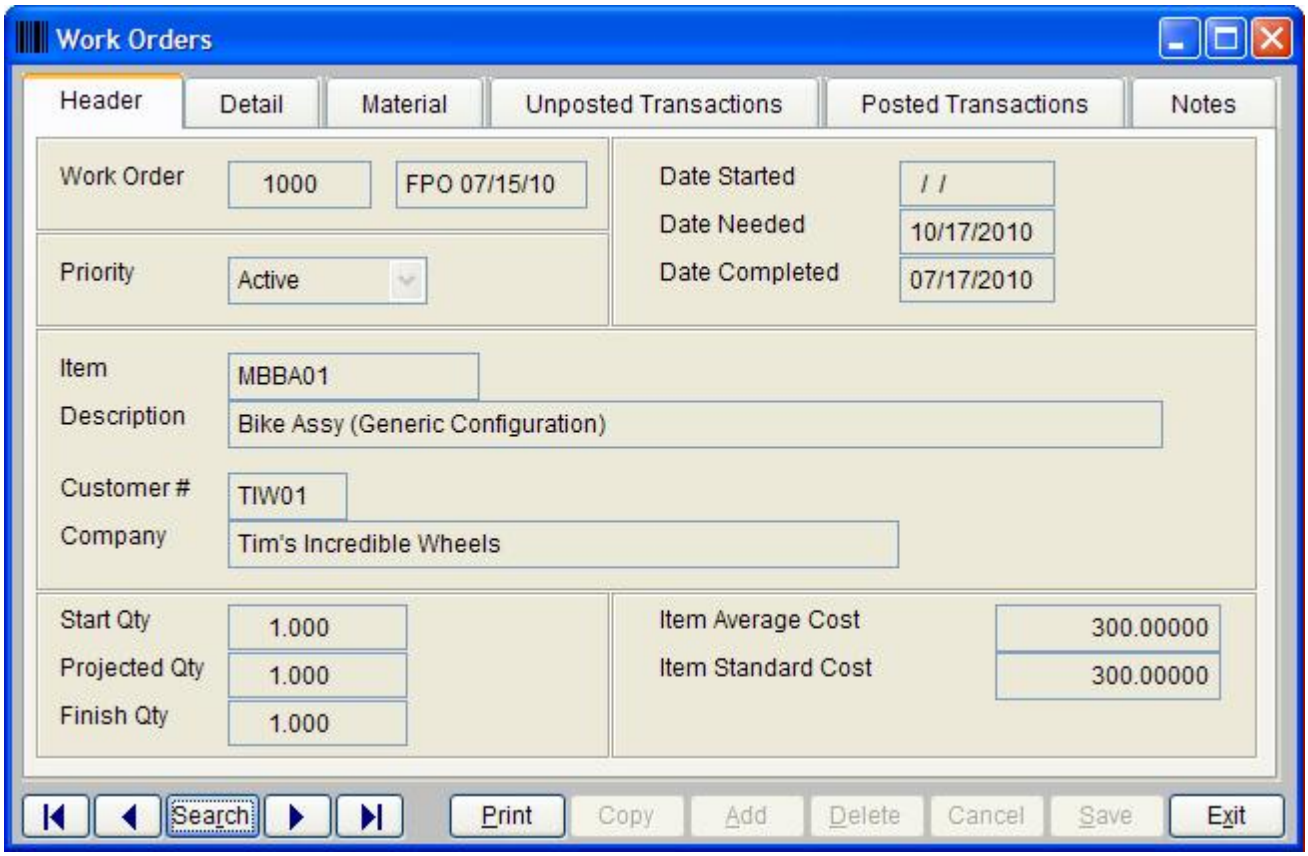
Create External Post

The Create External Post option can be found on the Transaction menu. Attempts to build the External Post file by validating transactions in the Preview External Post file. Any invalid transactions found by creating external post can be reviewed and edited by selecting Preview External Post from the transaction menu. Valid transactions can be reviewed and edited by selecting Maintain External Post File from the transaction menu.

Maintain External Post File

The Maintain External Post File option can be found on the Transaction menu. This is the final maintenance screen before information is posted to TIW Workshop™. Any changes to the file or deletions can be done here before posting to TIW Workshop™.

Maintain Work Orders



Depending on whether or not you are linked to a manufacturing system, this screen can work as valuable inquiry tool only or it can be the area where you can enter and maintain work orders. For stand alone operation this screen doubles as a maintenance screen where work orders and operation steps can be added to the system. When linked to TIW WorkShop this screen acts as a powerful inquiry tool.

You can look up work orders by using the search button in the lower left corner of the screen. The Unposted and Posted Transaction tabs show the unposted and posted transactions that have been entered for this work order respectively. While on the Unposted Transaction tab, you can add or edit existing unposted transactions.

To add a new work order, first select the Header tab and then click on the Add button. This will create a brand new work order. Once you have finished entering data on the header page, save the new order by clicking the Save button. To add operation steps to the detail portion of the work order, click on the Detail tab and then click the Add button. This will allow you to enter a detailed operation step into the grid. The Add button can be used to add additional steps. To add raw material requirements for this work order, click on the Material tab and then click the Add button. This will allow you to enter the material information in the grid. The Add button is then used again to add additional items to this list. To add transactions for this work order, click on the Unposted Transactions tab and then click the Add button. You can then enter your transaction in the fields at the bottom of that page.

The Copy button provides for making a copy of the currently selected Work Order. The work order header information as well as operation detail and material requirements are all copied to a new work order. You will need to assign the newly copied order a new work order number. Also all date fields are reset when you copy the order so that you can enter new order start date, needed by date, and completed date. Also all items on the material tab are reset to show no usage for the new order.

Shop Floor Employee Maintenance

You can maintain your employee file by selecting the employee maintenance option from the Maintain menu. Employees can be added from either the Shop Floor module or Time module if both modules are installed. The same employee list is shared between the two modules.

Note to Developers: Unity uses a single table called UNEMPLOY.DBF for all modules. This UNEMPLOY.DBF table holds all of the employee records for a given company.

The Hourly Rate field refers to the rate used for this employee when posting Labor transactions. This field is not necessary if the TIW Cost module is being used. If you wish to use standard labor rates, a labor grade with an employee number of $STANDARD and a rate per hour must be entered for each labor grade. This is the rate used when posting standard labor transactions.

The employee badge field reflects the badge number that this employee will use when creating transactions. The Mfg Employee # is the employee's number as it is found in the Manufacturing software. If linked to TIW WorkShop with the cost module installed this would be the employee's number in the Cost module.

A labor grade with an employee badge number and rate per hour should be created for each employee. An employee badge cannot be duplicated. Even if you are using multiple companies, it is important to note that the system will not allow the same employee badge # to exist in more than one company. If using standard labor rates, the $STANDARD employee hourly rate is usually the average of all rates in that grade.

Max. Job Time field is a setting on each employee record, which specifies the maximum time (measured in hours) an employee can work on a single labor transaction. This maximum job helps to validate transactions. If a labor time exceeds this time limit, the labor in transaction and labor out transaction are not matched up. This prevents an event such as the following being posted with an improperly calculated time: An employee clocking into a job on one day, forgetting to clock out on that job later that day, then forgetting again to clock back into the same job the next day, and then later the second day clocking out of the same job. Without the Max. Job Time, the system could allow a scenario such as this one to be posted with an enormous labor time calculation. If the Max. Job Time is set to limit the maximum size of a single posting it can eliminate a transaction such as the above from occurring. Typically the Max. Job Time is set to a number of hours equal to or less than the amount of time the individual works on a typical shift.

The Organizational Level (Org Level) fields can be used to designate such things as department, group, cell, etc. that this employee is a part of.

WorkShop Synchronization option allows you to synchronize your Unity employee table with the employee's that are set up in the TIW

Organization Levels

The Organization Level Maintenance screen allows you to setup your company's organization levels. These organization levels can be used to track employees by department, group, cell, etc.

See Also

Time - Employee Maintenance
Shop Floor - Employee Maintenance

Inventory Master File

The Item Master File selection on the Shop/Maintain menu provides a convenient way to: View the inventory files of the accounting system or manufacturing system to which Unity is linked or to add/maintain inventory items when not linked. One inventory record at a time is displayed with much of the critical information that might be useful in manufacturing.

When selected, the Item Master File screen displays the first part number in the file. The file is organized by part number in ascending order.

Select the Add button to add a new part number. When finished, select the Save button to retain the information. The search button provides a way to search for items by part number or by description.

In the "Inventory Labels to Print With" section you can establish how many labels will be printed when printing the Inventory Item Labels by Order from the inventory module. You make a choice for each of the three different order types; Sales Orders, Purchase Orders, and Transfer Orders. With each of the three drop down selections you will have the following choices: None, One Per Order, or One Per Unit. Selecting "None" here means that no labels would be printed for this item. Selecting One Per Order will print one item for each order receipt or order shipment. Selecting One Per Unit will print one label per unit shipped/received. For example if a Sales Order shipment for a quantity of 7 was made for a particular item, than it would print 7 labels. The number of labels would be equal to that of the quantity on the order which were shipped or received.

See Also

Inventory Item Labels by Order

Load OS and Application

Loads the operating system and data collection application on the Videx LaserLite Pro™. It also specifies the units ID #. You have a choice of several different applications that can run on the data collection unit. Each option will track varying levels of location information, lot numbers, or serial numbers.

The “Transaction Again” feature enables the user of the Vide LaserLite Pro the ability to enter repetitive data more quickly. With transaction again set to “yes”, the Videx will keep asking the user for more data when entering repetitive transactions such as the MI or MR transactions where multiple items may be entered at one time for the same work order operation. When the operator is done entering items they can press the F1 key on the Videx to get back to the original Transaction ID prompt.

Maintain Transaction History

Displays all previously posted transactions. You can also use this screen to search for previously posted transactions. If you wish to Maintain Transaction History, select that option from the Maintain menu.

Scrap Reason Code Maintenance

The Scrap Reason Code Maintenance screen allows you to setup your company's scrap reason codes to be associated with MS transactions (Material Scrap) in the Shop Floor Module. Each code can be up to 6 characters long and has a description associated with it.

See Also

Shop Floor - Understanding Transactions
Shop Floor - Material Scrap Report

Print Work Order

Choose the Print Work Order Report option from the Shop/Reports menu to print the bar code work order report. The work order report is sometimes referred to as a “traveler” or “shop paper.” It can be printed with or without the material. You can also limit to a range of work order numbers or by work order start date. Leaving the range fields blank will include all orders.

On the Work Order Report the Company ID, Work Order #, and Operation # have been combined into one bar code next to the printed operation #. This allows for faster data entry, by eliminating two extra scans.

When a work order is printed from Unity, the software will automatically update the printed flag on the work order itself. This then updates the work order table flagging the order as printed when linked to a manufacturing system such as TIW ALERE Manufacturing.

Preview External Post Report

Choose the Preview External Post Report from the Shop | Reports menu to print or preview this report. The preview external post report shows the transactions records in the preview external post file by Work Order Number, Route Step Number, and Transaction ID. This is a handy report to run immediately after using the create external post function. It can than be used as sort of an error report. When run immediately following create external post you will only see transactions on this report with warnings, such as "Missing Clock In" transaction.

This report can be filtered by a number of different options. You can also order it by either work order number or by employee badge number. The show material detail option provides a way to show or hide the details of the material transactions which includes serial number, lot number and location information.

External Post Report

Choose the External Posting Report from the Shop/Reports menu to print or preview this report. The external posting report shows the transactions records in the External Posting file by Work Order Number, Route Step Number, and Transaction ID. The report can be optionally grouped by employee.

Shop Floor - Transaction History Report

Choose the Transaction History option from the Shop/Reports menu to print or preview a list of posted transactions. The report can be filtered by work order number range, operation step, date range, finished good item number, employee badge ID, transaction code, or organization level. The finished good item represents the item which is being created on the work order. If the Order By "Employee" option is selected, the report will be ordered by employee and then by work order number. If the Order By "Work Order" option is selected the report will be ordered by work order number. The Transaction History report can be run in detail or summary format. In the detail format all of the individual transactions will be printed. In the summary format only the totals will be printed.

Consolidated Transactions Report

The consolidated transactions report shows both posted and unposted transactions on the same report. This provides user a look at all the transaction affecting a given work order or all of the transactions posted by a specific employee. The Consolidated Transactions Report can be filtered by Work Order Number, Operation Number, Date Range, Employee, Organizational Levels 1-5, and Transaction ID.

Employee Performance Report

Choose the Employee Performance option from the Shop/Reports menu to print or preview this report. The employee performance report compares the actual employee's performance against the standards that are established in the TIW WorkShop or Unity route file for Labor Cycle/Setup times. The report can be filtered by work order number range, date range, or finished good item number. You can also select a single or multiple employees by using either the "Select" or "Multiple Select" buttons next to the employee field.

It only shows completed route steps, where an OC transaction has been posted, unless you select the "Show Incomplete Steps" option. The report totals all of the LC/LS transactions for the given employee, work order, and route step to determine the actual time. The report totals all of the IP transactions for the given employee, work order, and route step to determine the quantity. The information on this report comes mainly from the transaction post history file in Unity.

The Cycle/Setup option allows you to show performance based on Labor Cycle times or on Labor Setup times. Please note that the setup performance is based on the setup time for the entire order rather than by the quantity that are produced. So if the report is run for setup time, the IP transactions are not a factor.

The Group By option will either group the results on the report by Employee ID or by Work Order. The default option groups the results by employee.

Work In Process Report

Choose the Work In Process Report option from the Shop | Reports menu to print the work in process report. The work in process reports shows work currently in process for each operation on the open work orders. It can be filtered by Finished Good Item number. You can also limit to a range of work order numbers or by work order start date. Leaving the range fields blank will include all open orders. The report can be ordered by Item, Need Date, Work Order, or Customer.

Material Scrap Report

Choose the Material Scrap Report from the Shop/Reports menu to print or preview this report. The material scrap report shows the MS (Material Scrap) transactions records. The report can optionally include posted, unposted, or both. The results can be optionally grouped by item or by work order.

Work Order Summary Report

The Work Order Summary Report, found on the Shop/Reports menu, prints a summary listing of Work Orders with general information, which is part of the work order header. The Work Order Summary Report can be filtered by work order number and date range.

Employee List Report

The Employee List Report, found on the Shop/Reports menu, prints a list of Employees with all of the information which is recorded in the employee maintenance screen. The Employee List Report can be filtered by employee badge number, and any of the organizational levels.

Employee Badges

Choose the Employee Badge option from the Shop/Reports menu or from the Time/Reports menu to print Employee Badges complete with bar code. You also have the option to preview this report before printing it. The employee badge can be filtered by employee badge number, labor grade, and any of the organizational levels.

See Also

Shop Floor - Employee Maintenance
Inventory - Employee Maintenance
Time - Employee Maintenance

Transaction Code List

Choose the Transaction Code List option from the Reports menu to print or preview a list of Unity Transaction Codes with descriptions and bar codes.

Understanding Inventory Transactions

Unity Inventory transaction codes specify the type of action that is taken on the inventory. For example, an inventory issue reduces the amount of inventory on hand by issuing from a specified inventory location. While and inventory receipt increases the number on hand by receiving inventory into a specified location.

There are eight basic transactions provided by the Unity Inventory module. Inventory Issue reduces inventory on-hand for a given item. Inventory Receipt increases inventory on-hand for a given item. Inventory Transfer moves inventory from one location to another. Physical Inventory Count records a new on-hand amount for a specified item. This will result in either an issue or receipt or no transaction company setup

Inventory Post Preview

The Preview Postings option can be found on the Inventory | Transactions menu. Raw data coming from importing transactions or postings directly from Terminal Emulation, RTP or RTPe arrive here. For more informaiton, please see the RTP or RTPe documentation if using the Real Time Polling software to gather data. You can also add new transactions manually from this screen. If any transaction is found to be invalid while Posting Transactions a warning will be displayed on that record on this screen. Records remain in the Preview PostingsUnderstanding Inventory Transactions Inventory Preview Post Report

Importing Transactions

By running the monitor, a text file is created called DATA.TXT. The system downloads this data from the Videx Laser Lite Pro. The transaction import function brings the transactions from this ASCII text file to the Preview External Post table for Shop Floor transactions. It brings time transactions into the Time Transactions table and inventory transactions into the Inventory Preview Post file. If the Shop Floor module is installed, the system then attempts to build the External Post file based on those transactions.

Inventory Post Transactions

The Post feature is used for posting inventory transactions to the linked Inventory System. This feature is not used for posting PI (Physical Inventory) transactions. A separate posting screen is used for those type of transactions. To access this feature choose the Post Transactions option from the Inventory | Transactions menu. This feature will attempt all inventory transactions currently in the inventory preview postings file with the exception of the PI transaction type. You can select which transactions you wish to post by toggling the check box in the first column in front of each transaction. Transactions can quickly be selected by type, simply by checking the appropriate type boxes at the top of the screen and the pressing the refresh button. Clicking the post button will process all of the selected transactions.

See Also

Understanding Inventory Transactions
Post Physical Inventory Counts

Post Physical Inventory Counts

The Post Physical Inventory Counts screen is used for posting the PI (Physical Inventory) transactions to the Inventory System. To access this feature choose the Post Physical Inventory Counts option from the Inventory | Transactions menu. The screen shows the physical inventory (PI) transaction records in the preview post file which have not yet been posted to the inventory control system. The two grids on the screen show the actual transactions (bottom of screen) and a summary (top of screen) of the net effect those transactions will have on the inventory. The summary grid at the top summarizes the physical inventory counts to a specific item at a specific location. It also summarizes by lot number/serial number. Users have the option of selecting which physical inventory counts they want to post to the inventory control system.

Item Counts can be accepted/unaccepted by either clicking the check box in the grid or by using the accept all or accept none buttons at the bottom of this screen. The accept all button will check every item in the grid. The accept none will remove the check mark from the accepted column for every item. Users also can save their accepted item counts for posting at a later time. After approving which records they want posted the user can click the save button to save their accepted records.

If a new physical count transaction (PI) is posted for any of the accepted items for the same location, lot, and/or serial # the system will automatically un-accepts that record so that it won't be posted until the user reviews the new physical inventory count. This screen is not used for posting any other transactions besides the PI transaction. Please see the Post Transactions feature for more information on posting other types of transactions.

See Also

Physical Inventory Counts Report

Inventory Master File

The Item Master File selection on the Shop/Maintain menu provides a convenient way to: View the inventory files of the accounting system or manufacturing system to which Unity is linked or to add/maintain inventory items when not linked. One inventory record at a time is displayed with much of the critical information that might be useful in manufacturing.

When selected, the Item Master File screen displays the first part number in the file. The file is organized by part number in ascending order.

Select the Add button to add a new part number. When finished, select the Save button to retain the information. The search button provides a way to search for items by part number or by description.

In the "Inventory Labels to Print With" section you can establish how many labels will be printed when printing the Inventory Item Labels by Order from the inventory module. You make a choice for each of the three different order types; Sales Orders, Purchase Orders, and Transfer Orders. With each of the three drop down selections you will have the following choices: None, One Per Order, or One Per Unit. Selecting "None" here means that no labels would be printed for this item. Selecting One Per Order will print one item for each order receipt or order shipment. Selecting One Per Unit will print one label per unit shipped/received. For example if a Sales Order shipment for a quantity of 7 was made for a particular item, than it would print 7 labels. The number of labels would be equal to that of the quantity on the order which were shipped or received.

See Also

Inventory Item Labels by Order

Inventory Control Employee Maintenance

You can maintain your employee file by selecting the employee maintenance option from the Maintain menu. Employees can be added from either the Shop Floor module, Inventory Control or Time module if both modules are installed. The same employee list is shared between the three modules.

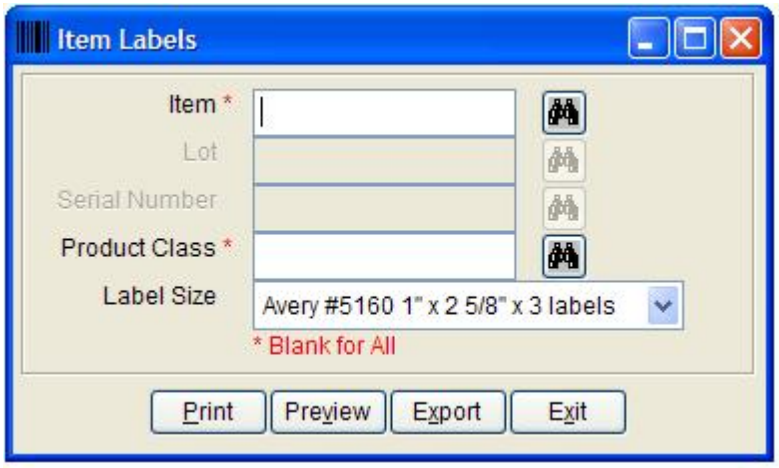
Note to Developers: Unity uses a single table called UNEMPLOY.DBF for both the Time, Inventory control, and Shop Floor modules. This UNEMPLOY.DBF table holds all of the employee records for a given company.

The Org Level fields can be used to designate such things as department, group, cell, etc. that this employee is part of.

See Also

Organization Levels

Print Item Labels



Print Item Labels, found on the Inventory | Reports menu, prints a list of Items with barcodes. Item Labels can be printed in many different sizes, including many standard Avery form sizes as well as standard dimensional sizes. For items with lot or serial number tracking turned on, a lot or serial number can also be specified and printed on the label.

Inventory Item Labels by Order

Item Labels can be printed for each sales order, purchase order, and/or transfer order in a variety of different formats (sizes). These labels can be printed by choosing Inventory | Reports | Item Labels by Order from the menu. Once an item label has been printed for a particular transaction, such as a purchase order receipt, the transaction is flagged to indicate that the label has been printed. This provides an easy way for the user to print all the new labels for recent transactions. The print option on this screen determines whether only the item labels for the new transactions or for all of the transactions should be printed.

Other options on this screen can further filter which labels are printed such as the document ID range, date range, and item number filter. The number of labels can either be selected by your choice on this screen or by the items default which is setup from the Inventory Master File screen. With the Number of Labels option you have the following choices: Item Default, One Per Order, or One Per Unit. Selecting Item Default here will force the program to look in the item master file to determine the number of labels to print for each item. Selecting One Per Order will print one item for each transaction. Selecting One Per Unit will print one label per unit shipped/received. For example if a Purchase Order receipt was made for item XYZ001 for 12 pieces, than it would print 12 labels.

Note to Developers: Unity uses the same label forms for this the Item Labels as it does for the Item Labels by Order. Label forms can be modified using the Modify Label option from the File menu.

See Also

Inventory Master File

Inventory Transfer Orders

Choose the Inventory Transfer Orders option from the Inventory/Reports menu to print Transfer order forms. You can also limit to a range of Transfer orders by Document # Range and Date Range, and Order Status. Leaving the range fields blank will include all orders.

Print Purchase Order

Choose the Print Purchase Order Report option from the Inventory/Reports menu to print the bar code Purchase order report. You can also limit to a range of Purchase order numbers or by Purchase order start date. Leaving the range fields blank will include all orders.

Sales Order

Sales Orders option on the Inventory/Reports menu prints a copy of the Sales Order and/or Pick List complete with bar codes to be used as a shipping document. This report can also be previewed to your screen.

Inventory Preview Post Report

Choose the Preview Post Report from the Inventory | Reports menu to print or preview this report. The preview post report shows the transactions records in the preview post file by Document Number, Date Range, and Employee Number. Users also have the option of filter this report by transaction code. This report can be a good tool to use while making corrections to transactions that may have been flagged with a warning while posting.

See Also

Inventory Post Preview

Physical Inventory Counts Report

Choose the Physical Inventory Counts Report from the Inventory | Reports menu to print or preview this report. The report shows the physical inventory (PI) transaction records in the preview post file by Item Number, Location, and Lot Number. Users also have the option of filtering this report by employee badge number, organizational level, tag number range, date range, or item number.

See Also

Post Physical Inventory Counts

Physical Inventory Tag Sheets

Choose the Physical Inventory Tag Sheets from the Inventory | Reports menu to print or preview this report. The report shows the inventory items along with a unique tag number for each specified location.

See Also

Post Physical Inventory Counts
Physical Inventory Count Report

Transaction History Report

Choose the Transaction History option from the Inventory/Reports menu to print or preview a list of posted transactions. The report can be filtered by document number, date range, or employee badge ID.

Employee List Report

The Employee List Report, found on the Inventory/Reports menu, prints a list of Employees with all of the information which is recorded in the employee maintenance screen. The Employee List Report can be filtered by employee badge number, and any of the organizational levels.

Time - Transaction Error Maintenance

Occasionally it is possible for an erroneous transactions to be passed through by the data collection system (i.e. Real Time Polling) that has an improper employee badge or some other error. Any transactions with an error flagged can be found on this screen. The Transaction Error Maintenance allows for correcting these transactions that they may be properly calculated later on. The Transaction Error Maintenance can be found under the Time/Transactions menu.

Time - Edit Transactions

Edit transactions allows you to view and edit both raw punches as well as calculated information by employee. This two-page screen has a transactions page, which contains the raw clock data, and a second page that shows the calculated payroll information. Additionally, the bottom of the screen gives a summary of the total hours worked by this employee over the past 3 months that they worked.

To edit transactions or calculations click on the transaction then click the override button at the top of the screen. Once a record has been edited, the source for that record will be replaced with an asterisk (*) plus the user login ID. If a record is edited more than once it will keep adding the new user login ID to the front of the source. Once a transaction has been edited, the system locks the edited time so that it will not be rounded the next time that the transactions are calculated. So, if you manually edit a transaction it will override the rounding rules established in the Pay Rule.

If a transaction or calculation is generated from the time clocks or are calculated by the system they show in black. If a calculation is added manually it shows in green. If a transaction or calculation is edited it shows in red. If a calculation is edited the system assumes you have entered the calculated time you want and will not recalculate the manually edited time.

The "Calculate" button at the bottom of the screen will re-calculate the transactions for the currently selected employee. This button can be used after you have made changes to an employees transactions to see what their new calculations will be. The "Print" button is used to print the Employee Time Card Report and will bring up the Employee Time Card Report screen.

Transactions

Transactions will automatically come in from the Unity Real Time Polling software and can be viewed, changed, and added per employee from the transaction page.

Transaction Types

ID	In for Day
OL	Out for Lunch
IL	In for Lunch
OD	Out for Day
DT	Department Transfer

The Date field is the actual time that the employee clocked or the time for the transaction you are adding. The rounded field is a calculated field that is calculated when you run the calculate posting from the Time/Transactions menu. When adding transactions the transaction fields should be filled in, but when editing transactions the rounded fields should be edited. This will allow you to see the person actual punch but will override the rounding. When a transactions has been edited it will no longer be adjusted when calculating. If a calculations has been edited the system will no longer adjusted the corresponding transactions because it is assumed that the person adjusting the calculation wants to dictate the amount of time that person worked for a given day. The source field is either the USER if the punch was manually entered or edited or blank if it has come from the terminal. The Org Level fields are populated by the Calculate Posting procedure and come directly from the employee maintenance screens, with the exception of the DT transaction. An organizational level is designated in the company setup screen to be the "department" level. This level is then used for DT transactions to designate the department, which the employee is transferring to.

The DCU ID represents the Data Collection Unit ID and is the designation for the device where this transaction originated from. The remarks field can be used for making comments on the selected transactions. There is also a find button next to this field for the purpose of providing a list of standard remarks. The remarks are maintained through the Remarks Maintenance screen. The source field shows the source for the transaction. This might be a user ID or it could be the word "MASS" if the transaction was added through the mass transactions feature. Anytime a transaction is overridden an asterisk is added to this field and the text becomes red in color.

If a set of transactions is not matching up because the total time has exceeded the Max shift length. You can click the override max shift check box and the system will then match the transactions and ignore the

max shift setting.

Calculated

The Calculated page shows the period calculation from the transaction tab or manually added calculated transactions like vacation or sick days. The pay type field is populated from either the pay rules or in the case of a manual posting it would come from the pay type screens. The date field is the beginning date for transactions and in the case of manually entered transactions it's the date you enter. The Hours field is the number of hours with two decimals of precision.

Importing Transactions

By running the monitor, a text file is created called DATA.TXT. The system downloads this data from the Videx Laser Lite Pro. The transaction import function brings the transactions from this ASCII text file to the Preview External Post table for Shop Floor transactions. It brings time transactions into the Time Transactions table and inventory transactions into the Inventory Preview Post file. If the Shop Floor module is installed, the system then attempts to build the External Post file based on those transactions.

Time - Calculate Postings

The calculate postings feature found under the Time/Transactions menu is used to calculate employee time. The calculate postings calculates employees transactions taking into consideration rounding rules established in pay rules, overtime calculation, lunch time rounding, etc.

Time - Add Transactions

To add multiple transactions or calculations in Unity, use the Add Transactions function. This function is a convenient way to add holiday time, plant shutdowns, and any other time that you would want to add the same transaction or calculation to multiple employees.

To add transactions for employees, you select “Transaction” in the first pull down at the top of the screen. Next you specify the transaction type to be added (i.e. ID, OD, etc.). Now you can specify the date and time of the transaction. There are a variety of filter options including; badge number, organizational levels, and employee job code.

For calculations you would select “Calculation” in the first pull down at the top of the screen. Next you specify the date, pay type, and total hours to be added for this calculation. And again there are a variety of filter options including; badge number, organizational levels, and employee job code.

Time - Post Transactions

Post Transactions option creates the external posting file. Depending on your company setup, this will either create a .DBF table file or an ASCII text file. When linked to ACCPAC Pro Series or VisionPoint payroll system it will created the External Payroll Posting file for them. When linked to ABRA it will create the ABRA posting file.

Time - Archive to History

The Archive to History feature found under the Time/Transactions menu is used to copy all employees transactions and calculations from the current files to the history files. Once archived, the data can be viewed by going to the Maintain History screen. Specify the cut-off date for you archive in the "Archive To" field. Any records prior to the specified date will be archived. Clicking the Create button will begin the Archive process.

You can reverse the last archive at any time by clicking the Reverse Last Archive button. This will undo the previous archive to history which was run. It will move any transactions or calculations which were previously moved the history files back to the current files.

Time - Pay Type Maintenance

The Pay Type maintenance screen is accessed through the Time/Maintain menu. Pay Types should be added to this table before adding pay rules or employees. Keep in mind that these pay types should match the pay types defined in your payroll system if you should choose to link to a payroll system.

The following table shows some typical Pay Types:

Description	ACCPAC Pro Series	ACCPAC VisionPoint
Hourly Regular	REGULAR	HR
Hourly Overtime	OVERTIME	HO
Hourly Double Time	DOUBLETIME	HD
Hourly Sick Time	SICK	HS
Hourly Personal Time	PERSONAL	HP
Hourly Vacation Time	VACATION	HV
Hourly Holiday	HOLIDAY	HH

Time - Pay Rules

Multiple pay rule should be created for any group of employees that have the same rounding rules and pay types. A detailed report of each Pay Rule can be printed by using the Print button on this screen.

Rounding

There are two common settings for each rounding, Rule and Min.

Rule - can be set to the Closest, Forward or Backward.

Min - can be any given number of minutes that you want to round to.

Rounding Types

Rounding can be done either per transaction or per day. Either type can be set to round to schedule on the in for day punch and/or the out for day punch. All Early in and/or late out transactions will be round to the schedule if the round to schedule flag is checked. The transfer point is the defining time between early or very early transactions or late and very late transactions.

For instance, lets suppose that a pay rule is set up to round to schedule and the early in transfer point is set to 22. The person is scheduled for 8:00am and they clock in at 7:35 am. The system will not round the transaction to the schedule, however if the clock in had been at 7:39 am they would have been rounded to the schedule.

Lunch / Regular

Lunch

Time - Schedule

A Schedule should be created for every group of employees that have the same schedule. Every employee must be assigned a schedule in the employee maintenance screen.

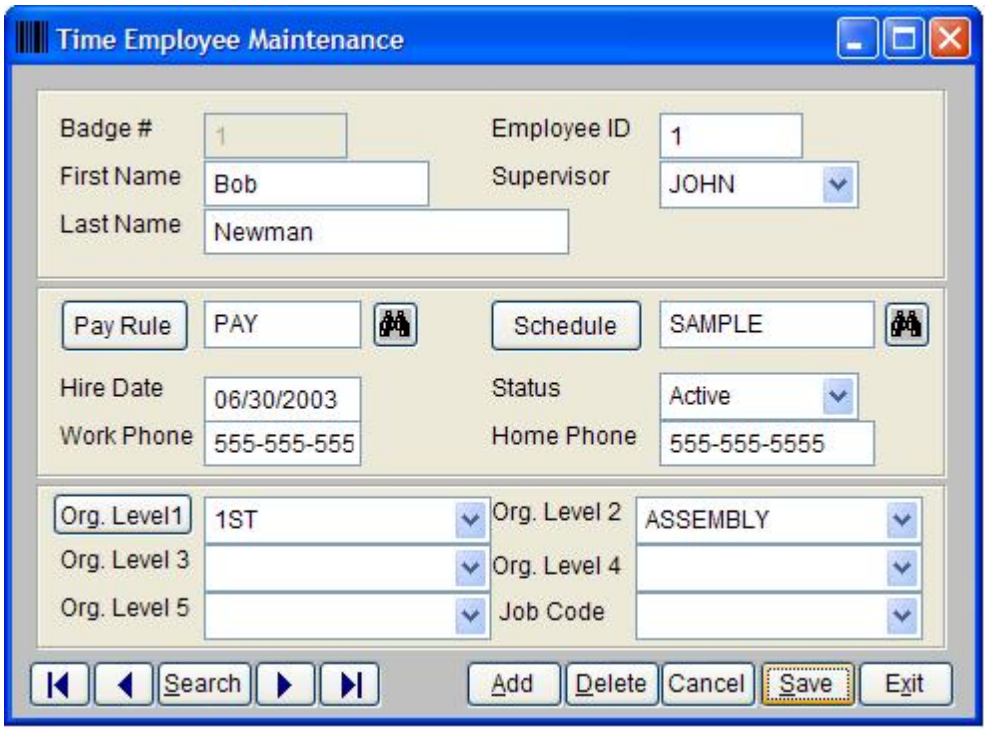
Rollover days should be used any time the schedule has a predictable trend. The rollover days are the number of days it takes for that trend to repeat. For example if someone works Monday through Thursday the first week and Tuesday through Friday the second week, you will set the Rollover Days to 14. If you have a standard weekly schedule, set the Rollover Days to 7.

The add new date button will add a day in this schedule. You can then enter the start date and time and the end date and time. The day will automatically fill in. Remember when entering dates that you must type in the full 4 digit century. Once the schedule is in place and you would like to advance the schedule, just click on the advance schedule button. This will add the next set of dates to your schedule. The rollover days setting will determine the number of days advanced with each click of the advance schedule button. Use the advance schedule button to quickly add more dates to your schedule.

See Also

Employee Maintenance

Time - Employee Maintenance



The Employee Maintenance screen is accessed through the Time/Maintenance menu. Employee badge number represents the employee's number for data collection purpose. This is the number which should be bar-coded on the given employee's badge. This badge number prints on the employee's badge when printing badges from Unity. While the badge number represents the employee inside of Unity, the employee ID is the number that would represent the employee for payroll purposes. If linked to an accounting/payroll software package, this number would be the employee's number within that system. Use the supervisor to specify which user is this employee's supervisor. The list that drops down on this field comes of the user maintenance (security) option within Unity. Assigning a supervisor is optional.

Employees must be assigned a pay rule and a schedule. Employees must also be set to status: Active in order for their transactions to be processed in the system. Transactions posted by inactive employees are not calculated.

The optional Org. Level fields allow you to categorize employees by Organization Levels. This might be used to indicate which department, group, cell, etc. that the given employee may be a part of. Organizational levels are user defined classifications for grouping and separating employees.

See Also

Schedule Maintenance

Pay Rule Maintenance

Time - Organization Levels

Organization Levels

The Organization Level Maintenance screen allows you to setup your company's organization levels. These organization levels can be used to track employees by department, group, cell, etc.

See Also

Time - Employee Maintenance
Shop Floor - Employee Maintenance

Time - Remarks Maintenance

Remarks are handy tool for use as standard comments on employee time transactions. Some examples for using remarks would be record reasons why an employee was not clocked in or out at a scheduled time. For example a remark could be created that states; "Broken Alarm Clock" or "Work Overtime on Rush Job".

The remarks that are added into this maintenance screen can then be used on the edit transactions screen and can optionally be printed on the employee's time card. The illustration above shows the remarks field from the edit transactions screen. Note the find button to the right of the field. Click this button will give a list of available remarks to choose from.

See Also

Edit Transactions
Time Card Report

Time - Maintain History

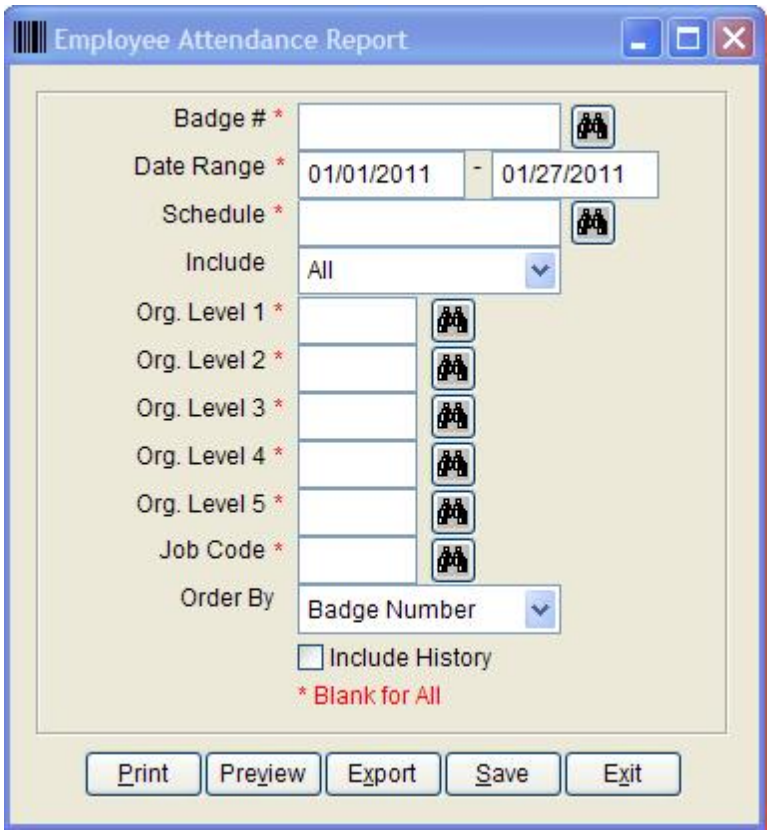
The Maintain History feature found under the Time/Maintenance menu is used to update the transaction history.

Time - Transaction Report

The transaction report can be found on the Time/Reports menu. The transaction report shows employee transactions for a given time period. You can optionally limit the report to a single employee and/or have it display only those transactions that have errors.

Additional filter options include a date range, transaction type, and Organizational Levels. A check mark in the History field will include the history files along with the current files when the report is run.

Employee Attendance Report



The employee attendance report can be found on the Time | Reports menu. The attendance report shows employee attendance each day by schedule. It can optionally show only those employees that are absent or those who are absent without approval. To specify for absent or absent unapproved you change the Include option to make your choice. The system determines approval based on the presence of a calculation record. For example, if an employee was scheduled to work for a given day and despite the fact that they had no in for day or out for day transactions they still had a calculation record for 8 hours of vacation, then this would be considered to approved. The same would be true for any pay type so long as the record exists in the calculation file for the given day.

The attendance report can be filtered by the organizational levels which have been entered on the employee maintenance screen. Optionally checking the Include History box will include data from the archived history in your results. The results from this report can either be ordered by the employee's badge number or by their last name.

Time Card Report

The time card report can be run from the Time/Reports menu. The time card report shows employee time by pay type for a given period of time. The organizational levels that are entered on the transaction screen can be used to filter the time card report. When the History box is checked, the time card report uses the history file rather than looking at the current transactions.

The Report Form option provides 3 different report styles: Standard, One Employee Per Page, and Summary. The Standard report shows full daily time details for each employee and their pay types, sorted by employee badge number or by employee last name. The One Employee Per Page option shows the same information as the Standard style except that a new page is started for each employee. The summary style shows just the summarized totals for each employee broken down by pay type, without showing the individual daily times for each employee.

Pay types can optionally be summed. The include comments option, determine whether or not comments entered on the time calculations are printed on the report.

Time Comparison Report

To view or print the Time Comparison report, select Time Comparison Report from the Time/Reports menu. The time comparison report shows employee time from the time module compared to labor time in shop floor module. The report can be filtered by employee badge number, date range, or organizational levels. The report can optionally be printed in standard summarized format or can be printed in detail.

Employee List Report

The Employee List Report, found on the Time/Reports

Employee Badges

Choose the Employee Badge option from the Shop/Reports menu or from the Time/Reports menu to print Employee Badges complete with bar code. You also have the option to preview this report before printing it. The employee badge can be filtered by employee badge number, labor grade, and any of the organizational levels.

See Also

Shop Floor - Employee Maintenance
Inventory - Employee Maintenance
Time - Employee Maintenance

Who's In Report

To determine which Employee's are currently logged into the system, the Who's In Report is used. The report is accessed from the Time/Reports menu. The report displays only those users who currently clocked in and have not yet clocked out. The Who's In Report can be filtered by employee badge number, and any of the organizational levels.

Who's Scheduled Report

The Who's Scheduled Report, found on the Time/Reports menu, prints a list of Employees and times they are scheduled within a specified time frame. The Who's Scheduled Report can be filtered by employee badge number and date range.