



Labor Tracker Setup Guide

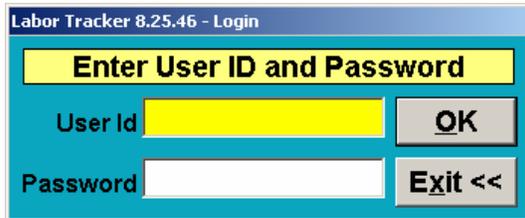
LABOR TRACKER SETUP GUIDE



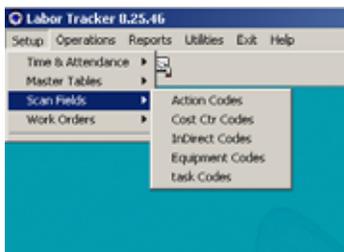
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GETTING STARTED

When you initiate *Labor Tracker* a screen will appear that requires you to sign in with your userid and password.



After you have pressed the [Enter] key the main menu will be displayed allowing you access to the menu steps that have been granted through security.



To select a menu step click the name of the menu step or key the shortcut keys as per Windows standrd shortcut methods.



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SETUP THE SYSTEM IN ORDER TO OPERATE IT

1. Setup Environment
 - Customize Software
 - Set Labor Code Names
2. Enter Scan Fields
 - Print Scan Field Bar-codes
3. Enter Customers
4. Enter Items
5. Enter Work Orders
 - Print Work Order Bar-codes



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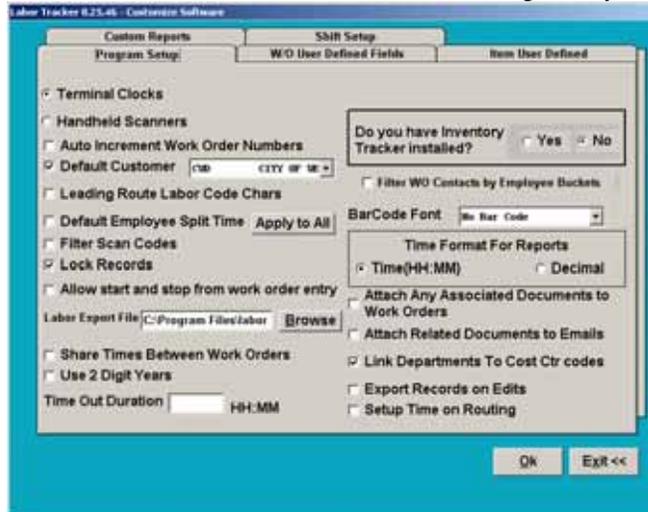
SETUP YOUR ENVIRONMENT

There are a number of default settings in Labor Tracker that need to be set prior to completing subsequent setup steps.

One-time setup can be defined in “Utilities/Set Environment/Customize Software”



Most of the fields in this screen need to be configured by an Advanced Tracker implementation specialist.



The fields listed below can be completed by an administrative user.

“Auto Increment Work Order Numbers” – Turn this on if you want the system to automatically increment work order numbers each time you add a new work order.

“Default Customer” – If all work orders, or most work orders apply to a specific customer, select the specific customer and when you create work orders, the default customer will be automatically selected. Before selecting a default customer you will have to enter the customer record in the customer table. (Setup/Customers)

“Lock Records” – If you wish users who review labor transactions to electronically sign off (lock) the transaction, turn this on.

“Bar-code Font” – Select a 3 Of 9 bar-code font.



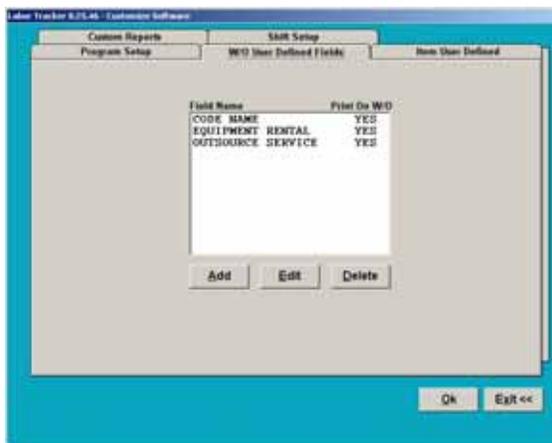
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“W/O User Defined Fields”

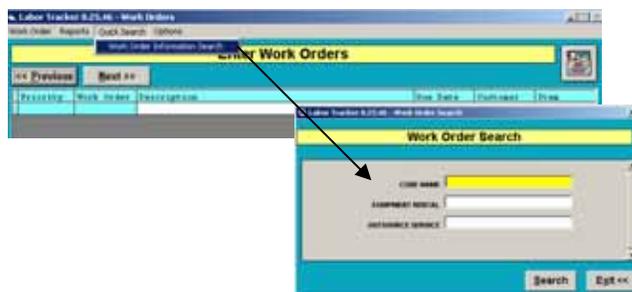
Labor Tracker supports the following default fields against each work order.

- Customer Code
- Item Code
- Start Date
- Due Date
- Close Date
- Short Description
- Long Description
- Close Description
- Contact Person
- Priority Number
- Scheduled Quantity
- Completed Quantity
- Estimated Time
- Completed Time

If the above list does not include some data elements that you want to associate with work orders, you can create your own.



Add as many fields as you wish. You will be able to print these fields on a work order scan sheet, or they can be used in the work order “quick search” feature to find work orders with specific or wild card values in the user defined fields.



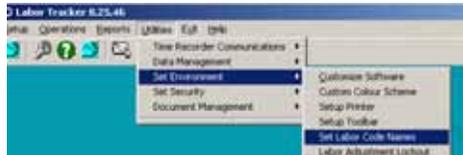


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SCAN FIELDS

Labor Tracker can track labor against a work order (synonymous with projects or jobs). This is defined as direct labor. Labor Tracker can track labor not related to a work order. This is defined as indirect labor. Labor Tracker enables you to define up to three direct labor categories, one indirect labor category, and one non-lapse time labor action category. These labor categories and their associated codes are referred to as scan fields.

Scan fields are defined in “Utilities/Set Environment/Set Labor Code Names”



Provide a label to describe the scan fields

Provide a label to describe the quantity fields

Category	Description	Qty1	Qty2
<input type="checkbox"/> Direct:	Test Ctr	Qty1	Qty2
<input checked="" type="checkbox"/> Machine:	Equipment	Qty2	Qty2
<input checked="" type="checkbox"/> Scan 4:	Task		

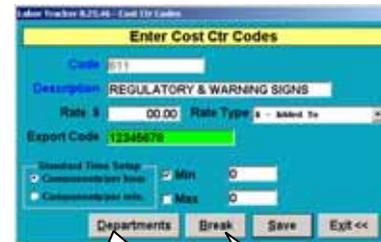
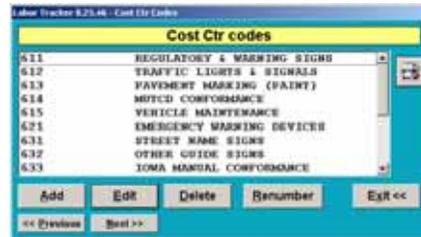
If you need more than one direct labor scan click the check box to turn on up to two additional fields



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DIRECT LABOR CODES

Direct labor pertains to lapse time activities that employees complete that are directly related to specific jobs or work orders. There are up to three direct labor code categories, each with a user defined label. This first Direct Labor category has standard time setup and Min/Max production quantities, the subsequent two direct labor codes do not have these fields, therefore standard efficiency reporting is based on the first direct labor code category only.



Department relation ship.
Used only for on-line
scanning validation.

Obsolete, do not
use.

CODE

A six character code that uniquely identifies the scan field.

DESCRIPTION

A thirty character description that describes the direct scan field code. The description will appear on the display screen for this step and in any subsequent programs where the drop and pick option is available for direct scan field code selection during data entry and on all reporting that lists direct scan labor information.

RATE

A five digit, 2 decimal place numeric field that you can use to apply hourly rate costs to labor activities in addition to or instead of the employee hourly rate.

RATE TYPE

A single character code that controls how the direct labor hourly rate will be applied to labor cost calculations. If you enter "A" the rate value will be added to an employees base when calculating labor costs. If you enter "O" then this rate will be used instead of any employee rate. If you enter "N" then this rate will not be used at all.

EXPORT CODE

An eight character alpha-numeric field that can be used to link labor cost information to a third party system when exporting data from *Labor Tracker*.

STANDARD TIME SETUP

This is used to measure the productivity of employees on specific labor activities against a pre-defined labor performance standard. Define the time standard by the minute or by the hour (you must select one).

MIN/MAX

Turn on/off and enter a value for the minimum standard and or the maximum standard. If you wish have a single standard rather than a range, select only one. Enter the relevant quantity standards. If you are not planning to measure performance efficiencies, enter a quantity of 0.



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INDIRECT LABOR CODES

Indirect labor pertains to lapse time activities that employees complete that are not related to specific jobs or work orders. E.g.: general cleanup, meetings.



CODE

A six character code that uniquely identifies the scan field.

DESCRIPTION

A thirty character description that describes the indirect labor code. The description will appear on the display screen for this step and in any subsequent programs where the pick and place option is available for indirect labor code selection during data entry and on all reporting that lists indirect labor information.

EXPORT REFERENCE

An eight character alpha-numeric field that can be used to link labor cost information to a third party system when exporting data from *Labor Tracker*.

RATE

A five digit, 2 decimal place numeric field that you can use to apply hourly rate costs to indirect labor activities in addition to or instead of the employee hourly rate.

RATE TYPE

A single character code that controls how the indirect labor hourly rate will be applied to labor cost calculations. If you enter "A" the rate value will be added to an employees base rates when calculating labor costs. If you enter "O" then this rate will be used instead of any employee rate.

If you enter "N" then this rate will not be used at all.

OVERTIME Y/N

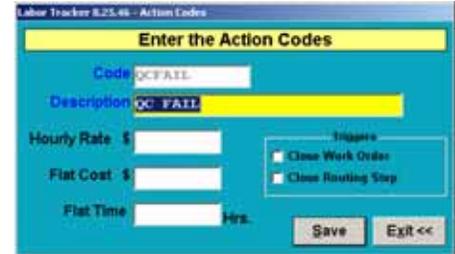
This is used to enable or disable overtime from being paid against a specific indirect code.



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ACTION CODES

Action codes pertain to work order related activities that occur that do not affect time spent or labor costs. Typical action codes are: HELD - job is placed on hold. QCCHK1 - job has completed quality check one. The system allows you to print an analysis report of action code activities and to view the action status of work orders on an inquiry screen. If you wish to use action codes then enter them into the system and employees can scan the appropriate action code as the action is being completed.



CODE

A six character code that uniquely identifies the scan field.

DESCRIPTION

A thirty character description that describes the action code. The description will appear on the display screen for this step and in any subsequent programs where the pick and place option is available for action codes selection during data entry and on all reporting that lists action code information.

HOURLY RATE

Enter an hourly rate. This will be extended by the "Flat Time" field to contribute to the cost of the action code.

FLAT COST

Enter a cost amount or leave it blank. If used it will be added to the hourly rate/flat time extended cost to calculate the total cost of the action activity.

FLAT TIME

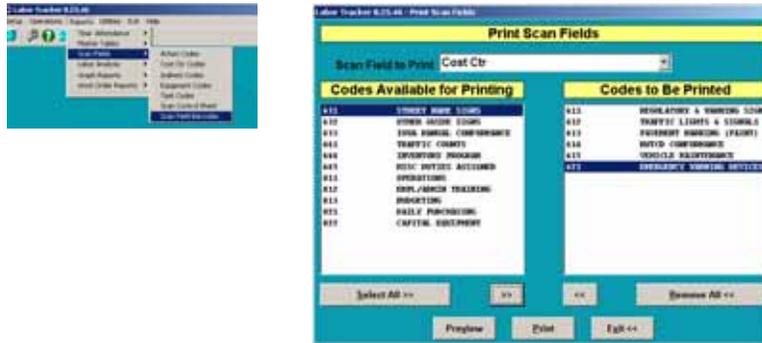
Enter a standard time value that will be applied for each transaction.



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PRINT SCAN FIELD BAR CODES

This allows you to print bar-code sheets for each of you scan field types. Select the “Scan Field to Print” and the specific codes you wish to print and click the print button.



Please note that it may be best to select printing for one sheet at a time with laser printers because of the variable length issues of bar-code printing. Eight bar-codes will fit on a 8 1/2 X 11 sheet of paper.



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ENTER CUSTOMERS

You may set up customers and then assign work orders to them. This will enable you to organize work orders by customer and generate labor cost reports by customer.



CODE

A six character code that uniquely identifies the customer.

NAME

A thirty character name. The description will appear on the display screen for this step, in any subsequent programs where the drop and select option is available during data entry, and labor analysis reports that include customer data.

PHONE NUMBER

A 10 character numeric field using the standard North American format of area code followed by seven digit number. The phone number is optional and is provided as an FYI field only.

ADDRESS INFORMATION

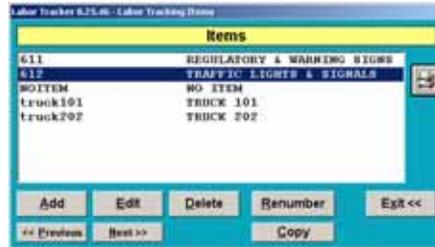
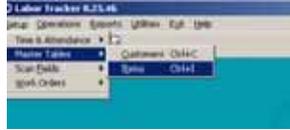
You can enter standard address information. This information is visible only on this screen and is FYI only.



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ITEM INFORMATION

You may set up items and then assign work orders to them. This will enable you to organize your work orders by item and generate labor cost reports by items.



CODE

A fifteen character code that uniquely identifies the item.

DESCRIPTION

A thirty character name. The description will appear on the display screen for this step, in any subsequent programs where the drop and select option is available during data entry, and labor analysis reports that include item data.

COST PRICE

FYI. Not yet used for any costing information.

SELLING PRICE

FYI. Not yet used.

USE QUANTITIES

Turn this on if you wish to maintain on hand and on order quantities for items. This is normally used in conjunction with the purchasing module of Labor Tracker.

ON HAND QUANTITY

Seven digit two decimal place number.

ON ORDER QUANTITY

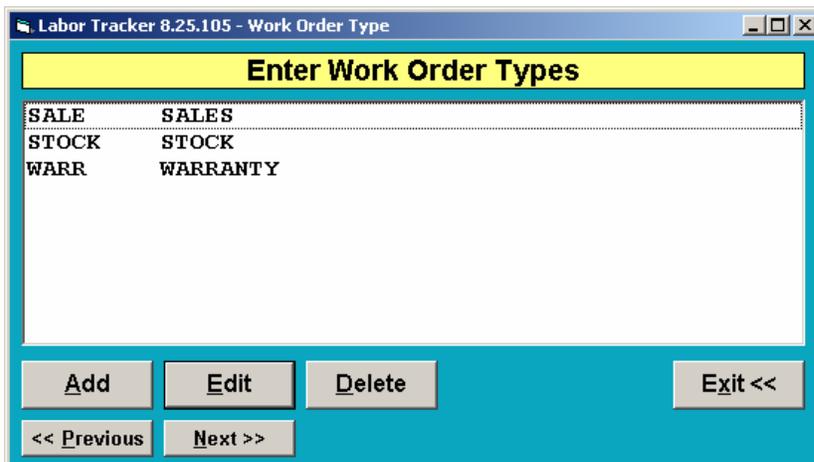
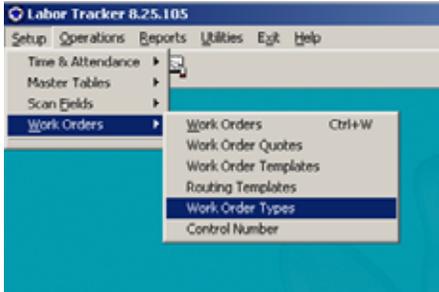
Seven digit two decimal place number.



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WORK ORDER TYPES

Work orders can be categorized using “Work Order Type” codes. These codes can up to six characters alpha/numeric. Each code can have an associated description up to 30 characters. Labor Tracker enables you to filter and select work orders and labor transactions by a variety of fields. Work order types are one of these fields.

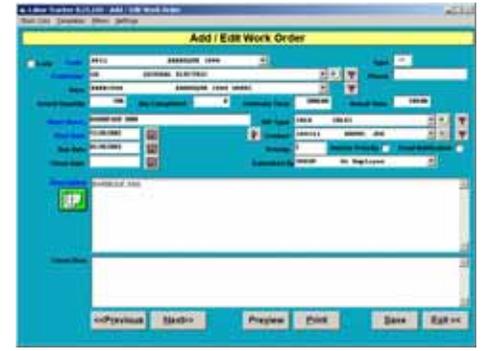
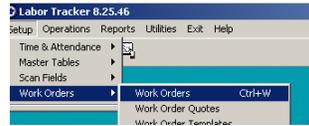




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ENTER WORK ORDERS

All direct labor that is tracked using *Labor Tracker* must be applied to a work order number. In *Labor Tracker* the term work order is synonymous with job or project. If you do not use work orders in your company and only wish to track labor activities independent of projects, jobs, or work orders then simply create a single, one time only work order record that all labor will be applied to.



CODE

A sixteen character code that uniquely identifies the work order.

CUSTOMER

Select a customer from the previously created pick list. (Mandatory)

ITEM

Select an item from the previously created pick list. (Optional)

SCHE D QTY

If the work order is associated with a deliverable quantity, enter the scheduled or planned quantity.

QTY COMPLETED

If the work order is associated with a deliverable quantity, enter the completed quantity when the work order is completed.

EST TIME

You can either enter an estimated time for the work order or the system will generate it from labor routing, if established for the work order.

ACTUAL TIME

This value will com from labor routing posting.

SHORT DESCRIPTION

A twenty five character field used to describe the work order. This field is used on all screens and reports to provide a descriptive indenty to a work order.

WORK ORDER TYPE

Select a work order type from the previously created pick list. (Optional). This field will be displayed on the work order schedule screen, and is one of the selection/filter fields in the work order specification bucket screen.



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CONTACT

Select a person from the employee master list entered in Employee Tracker (Optional). This field will be displayed on the work order schedule screen, and is one of the selection/filter fields in the work order specification bucket screen.

START DATE

Enter the date in MM/DD/YYYY format that the work order was started, or released.

PRIORITY

This field is used to assist you to prioritize your work orders. You can enter a value or when you click the “Calculate Priority” on the work order list the system will assign priorities based on the due date of each work order. Enter a numeric value up to 4 digits. (Optional)

ANCHOR PRIORITY

This is a check box. It is used to trigger the system to retain the value of the priority field if there is a value entered in the priority field. (Optional)

EMAIL NOTIFICATION

This is a check box. the work order and related documents upon saving the work order information. When this box is checked the system will attempt to email the work order and related documents to the primary and secondary contacts. The email address must be entered for each person who may be selected as either a primary or secondary contact. (Optional)

DUE DATE

Enter the date in MM/DD/YYYY format that the you expect the work order to be completed.

CLOSE DATE

Enter the date in MM/DD/YYYY format that the work order was completed.

DESCRIPTION

This is a long description designed to enable you to describe specific details of the work order. It is a memo field, with no limit to it’s length. This description is displayed on a mouse over event on the work order schedule screen and employee labor transactions screen. This description can also be printed on the work order scan sheet.

CLOSE DESCRIPTION

This is a long description designed to enable you to describe specific details of the work order after it is complete. It is a memo field, with no limit to it’s length.



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This button will display a list of employees who may be selected to receive work order emails in addition to the primary contact. (Optional)



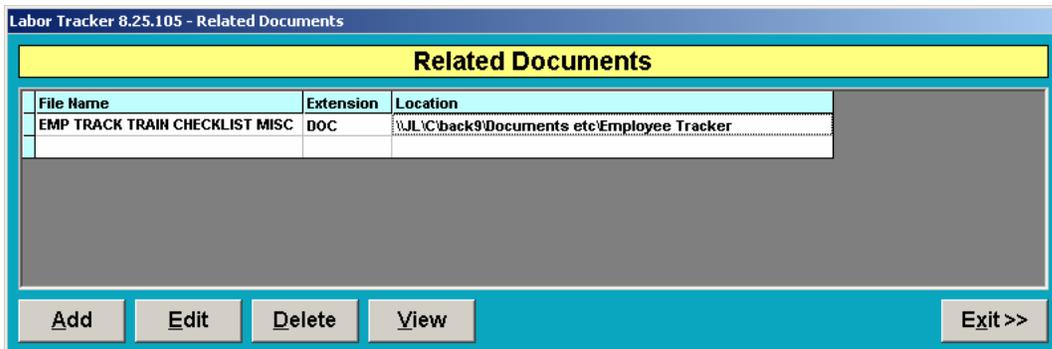
This button will “short cut” to an “add” record form for each field that it is placed beside.



This button will toggle a filter to restrict field that it is placed beside to the filter values set in the work order specification buckets.



This button will display a form to attach or view attached documents. These documents can be any type of object such MS Word, MS Excel, Autocad etc. It is necessary to have the relevant application installed on all computers that will need to view attached documents.





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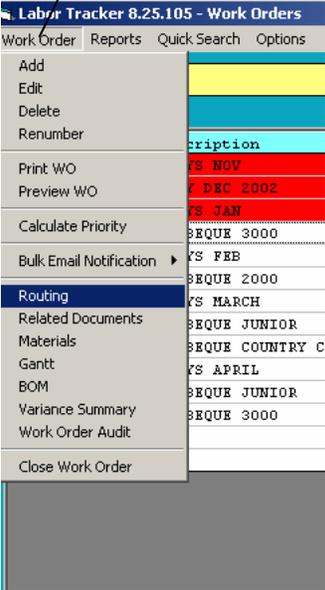
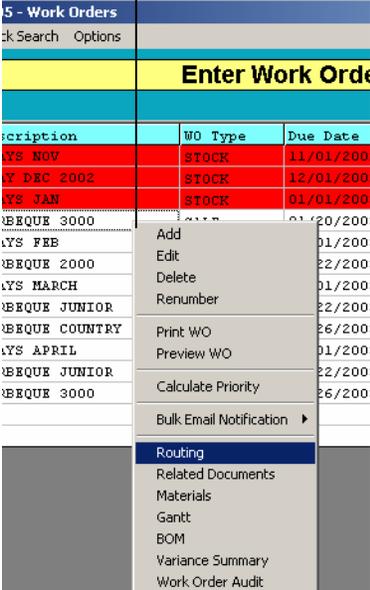
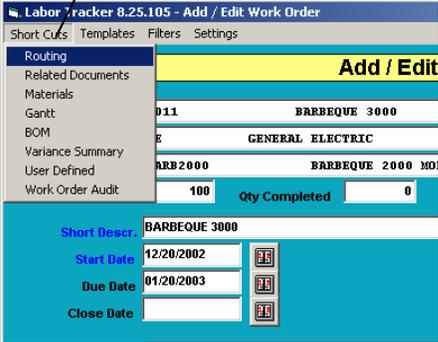
WORK ORDER ROUTING

If you pre-plan labor activities that work orders must go through to be completed, you may want to use work order routing. You must first create a work order, save it, and then you can either enter routing records or you can insert routing records from pre-set routing templates.

Click the "Work Order" Menu to display the menu and then click "Routing"

Right click on any work order line to the "Work Order" Menu to display the menu and then click "Routing"

Click the "Short Cuts" Menu from the work order "add/edit" entry to display the menu and then click "Routing"

Once you select the routing for a work order the following screen will be displayed. Click on a line and then click the [Edit] button to edit a routing record, click [Add] to add a new routing record, click on a line and then click the [Delete] button to delete a routing record.

Details About Work Order

Work Order Routing

WD Code: 3011 Search: Dollars

Seq	Seq	Seq	Complete	Emp	Rate	Time	Cost
001	001	001	001	001	001	001	001
002	002	002	002	002	002	002	002
003	003	003	003	003	003	003	003
004	004	004	004	004	004	004	004
005	005	005	005	005	005	005	005
006	006	006	006	006	006	006	006
007	007	007	007	007	007	007	007
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100	100	100	100	100	100	100	100

Buttons: Add, Edit, Delete, Delete All, Recalculate, Preview, Print, Exit



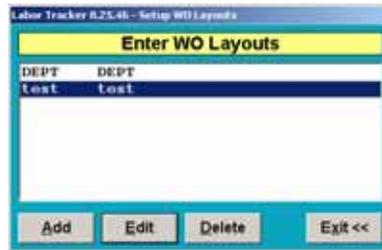
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PRINT WORK ORDER BAR CODES

If you are utilizing bar-code scanning for your labor data capture method you can, you can print work order sheets using a generic standard format, built in to the system, or you can design your own work order bar-code layout.

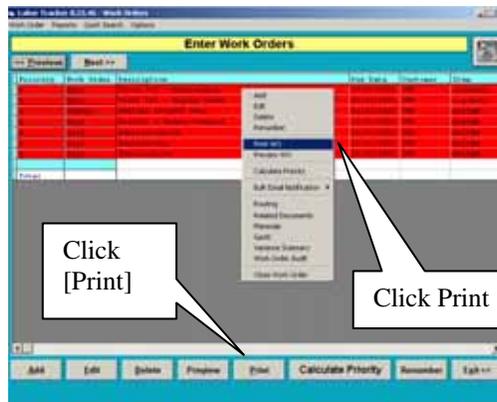
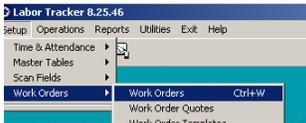
DESIGN YOUR WORK ORDER SHEET

Create as many work order layouts as required. When you print a work order you will be prompted to select the appropriate layout.



PRINT WORK ORDERS

There are a variety of areas that you can print work orders. One is from the Reports menu "Reports/Work Order Reports/Work Order Bar-code Sheet", and there are multiple areas to print work orders from the work order entry screen("Setup/Work Orders").

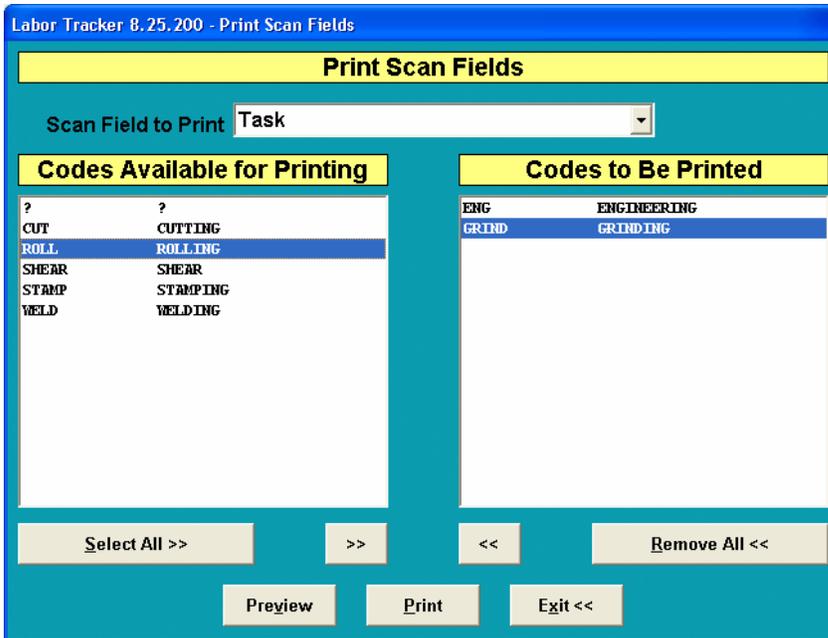
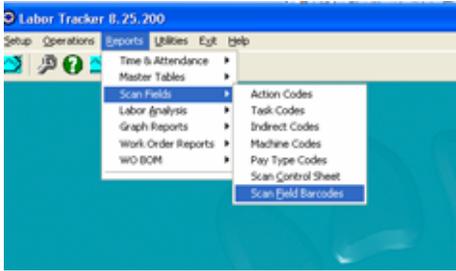




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PRINT SCAN FIELD BAR CODES

If you are utilizing bar-code scanning for your labor data capture method you can print scan field bar-codes using a generic standard format, built in to the system, which will print approximately 6 bar-codes per page. If you wish to have a customized bar-code sheet with a higher number of bar-codes you can use MS Word or MS Excel and by following a few tips, you can create a bar-code scanning sheet specific to your needs.



Scan field bar-codes print a text and bar-code for each “code” you select. The system prints a leading character in front of each code, which if you print your own bar-codes using MS Word or MS Excel, you will have to emulate. The leading characters are as follows: Direct – B, Indirect – C, Machine – D, Action code – E, Scan4 – F. Additionally, the bar-code font must be code 39 (3 of 9) with “*” before and after the text. For example: to print a bar-code using MS Word for the direct labor code WELD, type *AWELD* and select a code 39 bar-code font.