Infor Factory Track WorkForce Management User Guide

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About this guide

This guide describes the functional transaction flow to capture and report labor hours to WFM (Workforce Management) forms using Factory Track.

Organization

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Working with the Transactions	Using Factory track forms to capture and record labor hours for WFM

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Introduction

This user guide provides information about the WFM functionality that is integrated with Factory Track application to enable users:

- To track the work hours of employees when performing labor, team or workset operation.
- To maintain the relevant employee information. For example, employee name, employee ID, team, payroll information, etc.
- To track indirect tasks for the work order operations generated by the third-party ERP system.

WFM

Infor Workforce Management (WFM) is a comprehensive solution that helps companies around the world to align the workforce management processes for improving business requirements. The solution addresses all important workforce management requirements that include planning, time and attendance, workforce mobility, employee transaction manager, performance management, and compliance. WFM also comprises of scheduling and deploying the workforce, tracking the nature and amount of employee’s working hours, and managing the total labor cost. WFM works with the HR team and payroll systems to automate the processes and provides support to control and optimize labor costs to ensure productivity and compliance.

Factory Track

Infor Factory Track is a comprehensive production automation solution designed specifically for the manufacturing industry. Manufacturers can manage inventory, track labor, and automate the time and attendance operations using the Factory Track application. The solution is built on Mongoose, an innovative, rapid application-development-technology platform that enables you to easily enhance and extend core applications. Factory Track comprises of three modules:

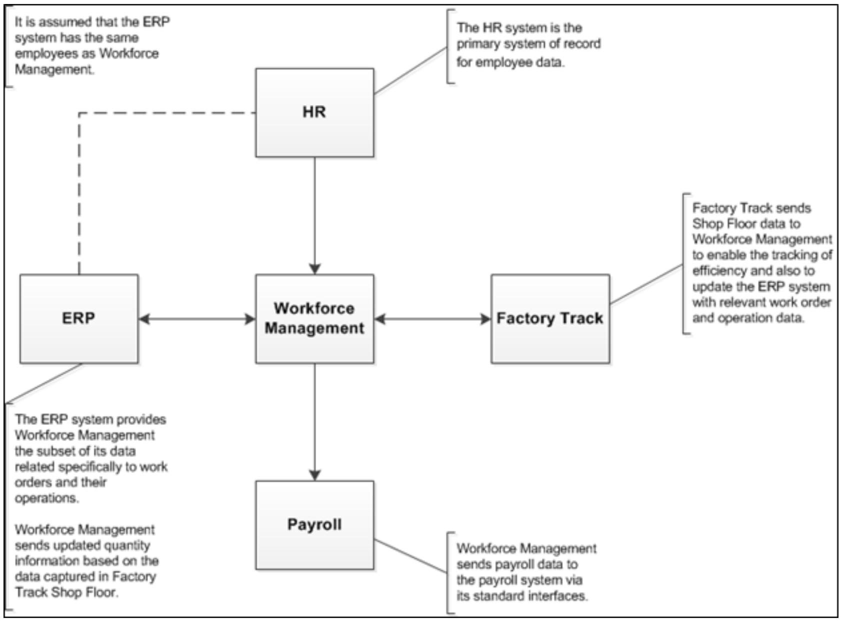
- The Shop Floor module is a work center automation solution that provides paperless manufacturing capabilities. Shop Floor delivers a kiosk-based solution that can be accessed by multiple production floor operators to track labor, Report job operations, and track work-in-progress and finished goods.

Integration with Factory Track

The integration of Infor Workforce Management and Factory Track provides manufacturers to track work time of employees against operations and indirect tasks (related to a specific work order operation) generated by a third-party ERP system.

To enable the processing of Shop Floor transactions in Factory Track, Workforce Management, Factory Track, and the ERP system must be connected.

This diagram shows how all three systems are connected:



ERP

- Sends work orders and supporting information to Workforce Management
- Receives Shop Floor transactions (for updating of orders and operations)

Workforce Management

- Receives work order and supporting information from the ERP and makes it available to Factory Track
- Receives Shop Floor transaction records from Factory Track
- Sends Shop Floor transaction information back to the ERP for order updates

Factory Track

- Receives ERP data and relevant employee information from Workforce Management
- Sends Shop Floor transactions to Workforce Management

Accessing WFM Transactions

You can access WFM transactions using a Web browser. Use these URL paths to access FT Admin and Shop Floor Users:

Admin - http://<hostname>/WSWebClient/Default.aspx

Shop Floor Users - http://<hostname>/WSWebClient/Default.aspx?page=formonly&form=FTWFMWorkCenterNavigationHome.ts

Note: You must update these URL paths with the actual host name of the utility server.

Parameters Overview

Use the Infor Factory Track WFM parameters forms to customize the application to meet the specific needs of the organization. There are three types of parameters forms:

- Site Parameters
- Global Parameters
- Transaction Set Maintenance

Configuring Site Parameters

1. Open the Site Parameters form.
2. Specify this information:
   - **Site**

     The appropriate site name for Factory Track. For example, WFM. This value is defaulted from the Sites form.
   - **ERP Type**

     Select Infor Work Force Management type.
   - Click **Generate Strings View**, **Generate Component View**, **Generate Menus View** and **Generate Images View** to generate component views related to the forms.
   - Specify this information on the **WFM Communication** tab:
     - **Web service URL**

       Specify the Workforce Management Runtime URL used to connect from Factory Track.
     - **Authentication Method**

       The method used to authenticate the web service URL with WFM. The default value is OAuth1.0a.

       Note: The consumer key and secret key need must be provided for this authentication method. The keys are configured within WFM web services prior to provisioning.
     - **Consumer Key**

       The WFM web service consumer key used for security purpose.
     - **Secret Key**

       The WFM web service secret key used for security purpose.
     - **WFM Site**

       Select the appropriate WFM site required for the configuration.
3. Click **Save**.

4 Click the **Test Connection**.

Configuring Global Parameters

Use the Global Parameters form to configure parameters that apply to all Infor Factory Track WFM transactions and forms.

1 Open the Global Parameters form.

2 Specify this information:

- **Check Employee Clock in Status**

  If this check box is selected, the Employee Authentication form validates the employee clock in status in WFM to process further. The application does not allow the employee to log hours until the employee clocks in for the day.

- **Employee Session idle time (in minutes)**

  For the Generic user, employee login session ends in the application based on the time set up. Also, the existing mongoose session idle logic remains the same and the mongoose session ends based on the web client timer out setup.

- **Time Code for Work order Run record**

  If this check box is selected, the used time code is displayed along with the End run transaction to post labor hours spent on a work order operation.

- **Time Code for Work order Set up**

  If this check box is selected, the used time code is displayed on WFM along with the End set up labor transaction.

- **PIN Required**

  Select this check box to require employees to specify a PIN number when signing in as a generic user.

3 Click **Save.**

Configuring Transaction Set Maintenance

Use the Transaction Set Maintenance form to configure parameters for transactions.

1 Open the Transaction Set Maintenance form.

2 Select **the required transaction to configure** from the grid.

3 Specify this information:

- **Successful Message**

  Select this check box to show a success message when the transaction is successfully completed.

4 On the **Transaction Parameters** tab, **Order Type Parameters** tab and **Order Types** tab configure the available parameters in the respective **Parameter** and **Value** columns.

5 Click **Save.**

Integrations for WFM Orders

This section is to define various integrations forms added for WFM to downloaded related work orders.

Load Orders from WFM

Use this form to download orders from the ERP (WFM) system.

Loading Orders from the WFM System

Use the Load Orders from WFM form to download orders from the WFM system into the FT. The orders can be downloaded manually or the system can be configured to automatically download the orders as part of a background task.

To download orders from the WFM system manually:

1 Open the Load Orders from WFM form. The related site is defaulted.

2 Specify this information:

- **Days Prior**

  Specify the number of days before the current date, to download orders.
  This data is downloaded with respect to the date range provided for the form.

- **Days into Future**

  Specify the number of days after the current date, to download orders.
  This data is downloaded with respect to the date range provided for the form.

3 Click **Process**. The number of successfully downloaded orders is displayed.

Work Orders

Use the Work Orders form to view orders that are downloaded from WFM into FT. This is a utility program in FT.

Viewing WFM Orders using Work Orders

To view the downloaded orders in the system:

1 Open the Work Orders from WFM form.

2 Select any of these filters to view the Work order operations within factory track:

- work order range,
- by operation and
- by work center

3 Click **Search** to view the Work Order details and work Order Extensions columns, based on the selection performed.

4 Click **Reset** to clear the selections used in the form. The screen now displays all the open operations.

WFM Transactions

This section provides the common field arrangement and set up of these WFM related transaction forms:

- Labor Transactions
- Teams and Worksets Transactions

The WFM forms default these details for all the transactions based on the user and employee credentials:

- **Employee Number**: The number used to identify the employee.
- **Employee Name**: The name of the employee.
- **Date** and **Time:** The current date and time.

  Note:

  a The date and time fields can be modified, only if the user ID has the appropriate authorizations.

  b Employee information cannot be modified.

Labor Transactions

This section is to define the functional transaction flow for WFM start run transaction to capture and report labor hours to WFM.

Start Run

Use this form to track the start time of the labor transaction.

Starting work order operations

Use this form to initiate the work order operations for the employee. You can review the operation related data for the employee.

To start a work order operation:

1. Open the Start Run form.
2. Specify this information:
   - **Work Order**

     The order (production order) used to track the labor transaction including the labor hours.
   - **Operation**

     The production operations related to the work order.

Note: The work order operation details are populated on the **Details** tab.

3 Use the **Details** tab to review this information:
   - The name of the work center
   - Status of the work order operation
   - The quantities of item used for the work order operation.
   - The completed, scrapped and available quantity of the item.

4 Use the **Progress** tab to review the progress of the work order for each operation.

5 Click **Process** to initiate the tracking of the labor hours for the work order operation.

   Note: The **Process** option is enabled only when the mandatory fields are specified and validated.

6 Click **Close**.

End Run

Use this form to track the end time of the labor transaction.

Stopping work order operations

Use this form to stop the work order operations for the employee. You can review the operation related data for the employee.

To stop a work order operation:

1 Open the End Run form

2 Specify this information:
   - **Work Order**

     The order (production order) used to track the labor transaction including the labor hours.
   - **Operations**

     The production operations related to the work order.

     Note: The work order operation details are populated on the Details tab.
   - **Good**

     The completed item quantity that can be used for the operation.
   - **Moved**

     The item quantity that can be moved for usage in the next operation.

3 Use the **Details** tab to review this information:
   - The name of the work center

- Status of the work order operation
- The completed, scrapped and available quantity of the item
- The Start Time
- The time period between the start time and the end time of the transaction.
- The item quantities used for the work order operation.

4 Use the **Scrap** tab to:

- Report the rejected quantity with the related multiple reason codes.
- Add a new scrap data (quantity with reason code) using (plus icon image).
- Delete the selected data (quantity with reason code) using (delete icon image).

5 Use the **Progress** tab to review the progress of the work order for each operation.

6 Click **Process** to stop the job operation.

Start Setup

Use this form to track the start time of the job setup activities.

Starting Setup Activities

Use this form to start the work order setup activities. You can review the operation related data of the employee.

To start setup activity:

1 Open the Start Setup form.

2 Specify this information:

- **Work Order**
  The order (production order) used to track the labor transaction including the labor hours.
- **Operation**
  The production operations related to the work order.
  Note: The work order operation details are populated on the Details tab.

3 Use the **Details** tab to review this information:

- The name of the work center
- Status of the work order operation
- The item quantities used for the work order operation.
- The completed, scrapped and available quantity of the item.

4 Use the **Progress** tab to review the progress of the work order for each operation.

5 Click **Process** to initiate the tracking of the labor hours for the work order operation.

Note: The **Process** option is enabled only when the mandatory fields are specified and validated.

End Setup

Use this form to track the end time of the job setup activities.

Stopping Setup Activities

Use this form to stop the work order setup activities. You can review the operation related data of the employee.

To stop setup activity:

1. Open the End Setup form.
2. Specify this information:
   - **Work Order**

     The order (production order) used to track the labor transaction including the labor hours.
   - **Operations**

     The production operations related to the work order.

     Note: The work order operation details are populated on the Details tab
3. Use the **Details** tab to review this information:
   - The name of the work center
   - Status of the work order operation
   - The completed, scrapped and available quantity of the item
   - The Start Time
   - The time period between the start time and the end time of the transaction.
   - The item quantities used for the work order operation.
4. Use the **Progress** tab to review the progress of the work order for each operation.
5. Click **Process** to initiate the tracking of the labor hours for the work order operation.

   Note: The **Process** option is enabled only when the mandatory fields are specified and validated.

Start Indirect

Use this form to track the start time of the indirect task.

Starting Indirect Tasks

Use the Start Indirect form to start indirect tasks.

To start indirect tasks:

1 Open the Start Indirect form.

2 Specify this information:

- **Indirect Code**
  The task code related to the indirect task of the work order operation.
- **Description (read only)**
  The description of the selected task code.

3 Click **Process** to initiate the tracking of the labor hours for the work order operation.

Note: The **Process** option is enabled only when the mandatory fields are specified and validated

End Indirect

Use this form to track the end time of the indirect tasks.

Stopping Indirect Tasks

Use the End Indirect form to stop indirect tasks.

To stop indirect tasks:

1 Open the End Indirect form.

2 Specify this information:

- **Indirect Task**
  The task code related to the indirect task of the work order operation.
- **Description**
  The description of the task code.

3 Click **Process** to initiate the tracking of the labor hours for the work order operation.

Note: The **Process** option is enabled only when the mandatory fields are specified and validated.

Work Center

The Work Center form is used to view the number of tasks and the active work orders assigned to an employee.

The employee can also view various options in the **Action** group box. These options are enabled and display the relevant forms only if:

- The **Work Center Popup Enabled** check box is selected in the Global parameter form.
- The **Workset** check box is selected for the employee in the Employee Type form.
- The specific data exists for the selected work order.

Using the Work Center UI form

The Work Center form is used to view the number of actions and the active work orders assigned to an employee.

To view the data in this form:

1. Open the **Work Center UI** form
2. Use the **Active** tab to review the total number of active tasks assigned to the employee.
3. Use the **Work Order** tab to review all the **Active** work orders assigned to the employee.

   Note: When the **Active** tab is selected, all the options other than the **End** option, are disabled in the **Action** group box.
4. Use the Actions tab to access these forms:
   - **Start Run**: Displays the details of the selected work order and the employee.
   - **Start Indirect:** Displays the start time of the indirect task assigned to the employee.
   - **Start Setup:** Displays start time of the job activities assigned to the employee
   - **End:** Displays the option to end the labor transactions.

     Note: These options are enabled and display the relevant forms only if The specific data exists for the selected work order.
5. Click **Close** to close the form.

Work Center Home Page Configuration

Use this form to configure the Work Center Navigation Home form. The employee must have authorization to the **Administrator** permission group to access this form.

The Work Center details are defaulted, based on FT user extension data. Only labor module transactions are enabled for WFM integration, based on the Work Center Navigation Home configuration as per the current user permission groups.

Teams and Worksets Transactions

This section explains the processing of all the Teams and Worksets transactions.

The form defaults these details for all the labor transactions:

- **Employee Number**: The number used to identify the employee.
- **Employee Name**: The name of the employee.
- **Date** and **Time:** The current date and time.

  Note:

  1. The date and time fields can be modified, only if the user ID has the appropriate authorizations.
  2. Employee information cannot be modified.

Team Maintenance

Use this form to create and modify the teams. You can also view the information regarding the members of the team and details of the jobs on which the team is working.

Creating Teams

You can use teams to streamline employee labor activities.

To create teams using the WFM module in Infor Factory Track:

1. Open the Teams form.
2. Specify this information:
   - **Team**

     The form defaults the details of the existing team maintenance fields. The system runs a validation, if the user selects, provides or scans team id and populates Team Description, Badge ID, Active checkbox, Workset Enabled checkbox and employee's details.

     To create a new team, specify a team number.

     Note: No validation runs if the user creates a new team.
   - **Description**

     Specify a description for the team.
   - **Badge ID**

     Specify a badge ID for the team.
   - **Active**

     Select the check box to enable or disable the team's active status.

- **Workset Enabled**

  If this check box is selected, the team can work on multiple jobs. If this check box is cleared, the team can work on only one job at any given point of time.

3 Select **Add a New Member** on the **Members** tab. A new line is created in the grid. Click **Switch Team** to remove the team members from the current team and add to the new team.

4 The Team grid on the **Members** tab, displays the team members list, to update the respective roles.

   a Specify an employee ID in the **Employee** field in the new line. Click **Add a New Member**, to add an active employee to the current team.

   Note: The system runs a validation to check if the employee is not part of any other active team and not working on other active task.

   - Also, the record populates the employee's name and other related attributes.

   b Click **Team Leader**, to configure team members as the team lead to perform various transactions (start and stop).

   Note:

   - The first team member is always set as the team leader.
   - Each team can have multiple leads but at any specified time there must be at least one leader.

   c The **Date Added** field displays the date when a member is added to the team. The field is defaulted with the current date for the new members.

   Note: User cannot modify the field along with the employee attribute data fields.

5 On the **Members** tab, click **Save**.

6 Click **Save.**

Start Team Run

Use this form to initiate work order operations for the team. To access the Start Team Run form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

Starting Work Order Operations for a Team

Use the Start Team Run form to start work order operations for the team. When you start an operation for the team, all team members are assigned to that operation. To access the Start Team Run form, the user must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

To start a Work Order operation for a team:

1 Open the Start Team Run form.

2 Specify the **Team Name** or **Team Badge ID**.

3 Specify this information:
   - **Work Order**

     The order (production order) used to track the Teams and Worksets transactions including the labor hours.
   - **Operation**

     The production operations related to the work order.

     Note: The work order operation details are populated on the Details tab.
4 Use the **Details** tab to review this information:
   - The name of the work center
   - Status of the work order operation
   - The item quantities used for the work order operation.
   - The completed, scrapped and available quantity of the item.
5 Use the **Progress** tab to review the progress of the work order for each operation.
6 Click **Process** to initiate the tracking the labor hours for the work order operation.

   Note: The **Process** option is enabled only when the mandatory fields are specified and validated.
7 Click **Close**.

End Team Run

Use the End Team Run form to stop work order operations for the team. You can use the form to report the completed and moved quantities, scrap items. This form is also used for assigning lot and serial numbers when stopping work order operations. To access the End Team Run form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

Stopping Work Order Operations for a Team

Use the End Team Run form to stop work order operations for a team. You can use the form to report the completed and moved quantities, scrap items. This form is also used for assigning lot and serial numbers when stopping work order operations. To access the End Team Run form, you must be assigned to the **Administrator**, **TeamLeader**, or **Supervisor** permission group.

To stop a Work Order operation:

1 Open the End Team Run form.
2 Specify the **Team Name** or **Team Badge ID**.
3 Specify this information:
   - **Work Order**

     The order (production order) used to track the Teams and Worksets transactions including the labor hours.

- **Operations**

  The production operations related to the work order.

  Note: The work order operation details are populated on the Details tab.
- **Good**

  The item quantity that can be used for the operation.

4 Use the **Details** tab to review this information:
   - The name of the work center
   - Status of the work order operation
   - The completed, scrapped and available quantity of the item
   - The Start Time
   - The time period between the start time and the end time of the transaction.
   - The item quantities used for the work order operation.

5 Use the **Scrap** tab to:
   - Report the rejected quantity with the related multiple reason codes.
   - Add a new scrap data (quantity with reason code) using (plus icon image).
   - Delete the selected data (quantity with reason code) using (delete icon image).

6 Use the **Progress** tab to review the progress of the work order for each operation.

7 Click **Process** to stop the job operation.

Start Team Set Up

Use the Start Team Set Up form to start labor setup transaction for the team that the employee is part of as a team member or as a supervisor of the teams.

Starting Labor Setup transactions

Use the Start Team Set Up form to start labor setup transaction for the team that the employee is part of as a team member of as a supervisor of the teams. To access the Start Team Setup form, the system runs a validation to check if the current employees are eligible to access the form and perform the transaction as team member roles. However, for the team leader, the screen is defaulted with his team information and employee number on the header. In this scenario, the Badge ID and the Team fields cannot be modified.

Note: If the supervisor of any work group opens the form, the Team and the Badge fields can be edited by selecting a team from the list of the reporting teams.

To start a labor setup transaction for a team:

1 Open the Start Team Set Up Run form.

2 Specify this information:
   - **Work Order**

The order (production order) used to track the teams and torksets transactions including the labor hours.

- Operation

  The production operations related to the work order.

  Note: The work order operation details are populated on the Details tab.

3 Use the **Details** tab to review this information:

- The name of the work center
- Status of the work order operation
- The item quantities used for the work order operation.
- The completed, scrapped and available quantity of the item.

4 Use the **Progress** tab to review the progress of the work order for each operation.

5 Click **Process** to initiate the tracking the labor hours for the work order operation.

Note: The Process option is enabled only when the mandatory fields are specified and validated.

6 Click **Close**.

End Team Setup

Use this form to stop labor setup transactions for the team where the employee is a team member or a supervisor.

Stopping Setup Activities

Use this form to stop labor setup transactions for the team where the employee is a team member or a supervisor. To access the End Team Set Up form, the system runs a validation to check if the current employees are eligible to access the form and perform the transaction as team member role. However, for the team leader, the screen is defaulted with his team information and employee number on the header. In this scenario, the Badge ID and the Team fields cannot be modified.

Note: If the supervisor of any work group opens the form, the Team and the Badge fields can be edited by selecting a team from the list of the reporting teams. So, as part of the work group configuration, every team member reports to the supervisor.

To stop setup activity:

1 Open the End Team Set up form.

2 Specify this information:

- **Work Order**

  The order (production order) used to track the Teams and Worksets transactions including the labor hours.

- **Operations**

  The production operations related to the work order.

Note: The work order operation details are populated on the Details tab.

- **Good**

  The item quantity that can be used for the operation.

3 Use the **Details** tab to review this information:

- The name of the work center
- Status of the work order operation
- The completed, scrapped and available quantity of the item
- The Start Time
- The time period between the start time and the end time of the transaction.
- The item quantities used for the work order operation.

4 Use the **Scrap** tab to:

- Report the rejected quantity with the related multiple reason codes.
- Add a new scrap data (quantity with reason code) using (plus icon image).
- Delete the selected data (quantity with reason code) using (delete icon image).

5 Use the **Progress** tab to review the progress of the work order for each operation.

6 Click **Process** to stop the job operation.

Start Team Indirect

Use this form to start indirect transactions for the team where the employee is a team member or a supervisor.

Starting Indirect transactions

Use this form to start Indirect transactions for the team where the employee is a team member or a supervisor. To access the Start Team Indirect form, the system runs a validation to check if the current employees are eligible to access the form and perform the transaction as team member roles. However, for the team leader, the screen is defaulted with his team information and employee number on the header. In this scenario, both the Badge ID and Team fields cannot be modified.

Note: If the supervisor of any work group opens the form, the Team and the Badge fields can be edited by selecting a team from the list of the reporting teams.

To start a labor setup transaction for a team:

1 Open the Start Team Indirect form.

2 Specify this information:

- **Indirect Task code**

  Select or scan the valid indirect task code from local production data table.

Note: The data is validated using the available local table. If the data is not available, the application performs the check with the WFM and downloads all the operations related to the available work order.

3 Click **Process** to initiate the tracking the labor hours for the work order operation.

Note: The **Process** option is enabled only when the mandatory fields are specified and validated.

End Team Indirect

Use this form to stop indirect transactions for the team that the employee is part of as a team member or as a supervisor of the teams.

Stopping Indirect transactions

Use this form to stop Indirect transactions for the team that the employee is part of as a team member or as a supervisor of the teams. To access the End Team Indirect form, the system runs a validation to check, if the current employees is eligible to access the form and perform the transaction with the team member roles. However, for the team leader, the screen is defaulted with his team information and employee number on the header. In this scenario, both the Badge ID and Team fields cannot be modified.

Note: If the supervisor of any work group opens the form, both the Team and Badge fields can be edited by selecting a team from the list of the reporting teams. So, as part of the work group configuration, every team member reports to the supervisor.

To stop a labor setup transaction for a team:

1 Open the End Team Indirect form.

2 Specify this information:

- **Indirect Task code**

  Select or scan the valid indirect task code from local production data table.

  Note: The data is validated using the available local table. If the data is not available, the application performs the check with the WFM and downloads all the operations related to the available work order.

3 Click **Process** to stop the job operation.

Work set Maintenance

Use this form to maintain work set of multiple tasks for work set enabled team or an employee.

To access the Workset Maintenance form, the system runs a validation to check if the current employees is eligible to access the form and perform the transaction as work set enabled employee or team lead roles. However, for the team leader, the screen is defaulted with his team information and employee number on the header. In this scenario, both the Badge ID and Team fields cannot be modified.

Note: If the supervisor of the work set enabled teams opens the form, the Type field is enabled and can be set to any of these options: Employee or Team. If the user selects team, both team and badge fields are enabled in the form.

Working with Team Maintenance form

Use the Team Maintenance form to maintain team The authorized supervisor is allowed to create or edit/remove a team member from the respective teams. To access the Team Maintenance form, user must be assigned to the **Administrator**, **Supervisor**, or **TeamLeader** permission group. An employee can only be a member of one team. If you are trying to add an employee to a team who is already a member of another team, you must first remove that employee from the other team. If a team is currently working any jobs, any employee added to the team must be assigned to those jobs.

To configure the teams as required:

1. Open the Team Maintenance form.
2. Click **Create a New Team**, all the fields in the form are cleared and the form prompts for the new team ID on **Team** field.
3. Click **Save** to updates data for the current displayed team and you can also create a new team.
4. Specify the team name or team badge ID, to create a new team.
5. Select **Active**, to enable or disable team active status. This field is enabled only if the team has no active tasks.
6. Select **Work set Enabled**, to enable the team to work on multiple tasks. This field is enabled only if the team has no active tasks.
7. Select **Add a New Member** on the **Members** tab. A new line is created in the grid. Click **Switch Team** to remove team members from the current team and add to the new team.
8. The Team grid on the **Members** tab, displays the team members list, to update the respective roles.
   a. In the **Employee** field on the new line, specify an employee ID. Click **Add a New Member**, to add an active employee to the current team.

   Note:

      - The system runs a validation to check if the employee is not part of any other active team and not working on other active task.
      - Also, the record populates the employee’s name and other related attributes.

   b. Click **Team Leader**, to configure team members as the team lead to perform various transactions (start and stop).

   Note:

      - The first team member is always set as the team leader.

- o Each team can have multiple leads but at any specified time there must be at least one leader.

c The **Date Added** field, displays the date when a member is added to the team. The field is defaulted with the current date for the new members.

Note: You are not allowed to edit the field along with the employee attribute data fields.

9 On the **Members** tab, click **Save**.

10 The **Active** tab displays all the active tasks on which the team is currently working. The tab displays no value for the new teams.

Viewing Workset Details

You can use the **Workset** tab on the Workset Maintenance form to view information about the operations, tasks, activities, projects and service labor on the workset.

To view workset details:

1 Open the Workset Maintenance form.

2 In the **Type** field, select **Employee** or **Team**.

3 Specify the team or the badge ID.

4 Select **Refresh Workset**. Details about the workset are displayed.

Adding Jobs to Worksets

You can add operations, tasks, activities, projects, and service labor, prior to the initiation or completion of a workset. Operations, tasks, activities, projects or service labor added to a running workset are automatically started.

1 Open the Workset Maintenance form.

2 Select **Employee** or **Team** in the **Type** field.

3 Specify the team or the badge ID.

4 Select **Refresh Workset** to view the workset associated with the specified team or badge ID. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.

5 In the **Order Type** field, select one of these tasks:

- **Run** : add a Work Order operation
- **Indirect**: add an indirect task
- **Project**: add project labor
- **Setup**: add a setup activity
- **SRO**: add service labor

a For **Run** or **Setup** , specify a job, job suffix, and operation. The item number is displayed.

- o The **Res ID** field is displayed only if the **Order Type** field is to **Run** or **Setup**.

- The **machine resource** field is displayed if the **Order Type** field is to **Run** or **Setup** and the **Combine Labor and Machine Time** check box is selected.

b For **Indirect**, select a task code.

c For **Project**, specify a project number, task code, and cost code.

d For **SRO**, specify a partner ID, service order number, line number, and operation.

6 Select the **Add Details** tab to view details for the selected operation or task.

7 For **Run** and **Setup** transactions, the employee can select the **Combine Labor and Machine Time** check box to report machine time as a ratio of the labor time. When FT Time Track module is implemented the employee can specify the ratio using the **Machine Ratio** field, that is displayed when **Combine Labor and Machine Time** is checked.

8 The machine ratio determines the part of the reported labor time that must be reported for the machine. For example, a ratio of **.5** must report half the reported labor time for the machine. If the Time Track module is not implemented and the **Combine Labor and Machine Time** check box is selected, machine time must always be reported as a one-to-one ratio to labor time.

9 Select **Add**.

Removing Jobs from Worksets

You can remove operations, tasks, activities, projects and service labor from a workset that is not currently running. To stop an operation, task, activity, project or service labor on a running workset, see the Stopping Worksets section below.

1 Open the Workset Maintenance form.

2 In the **Type** field, select **Employee** or **Team**.

3 Specify the **Team** or the **Badge ID**.

4 To view the workset associated with the specified team or badge ID, select **Refresh Workset**. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.

5 On the **Workset** tab, select the operation or task you are removing.

6 Select **Remove**.

Starting Worksets

Starting a workset starts all of the related operations, tasks, activities, projects and service labor.

To start a workset:

1 Open the Workset Maintenance form.

2 Select **Employee** or **Team i**n the **Type** field.

3 Specify the **Team** or the **Badge ID**.

4 Select **Refresh Workset, t**o view the workset associated with the specified team or badge ID. The operations and tasks in the workset are displayed in the grid on the **Workset** tab.

5 To start the workset, select **Start All**.

Stopping Worksets Using the Work Center Form

Only workset-enabled employees can stop worksets.

To stop the workset:

1. Open the Work Center form.
2. The current date and time is specified by default. You can only modify the date and time if the **Work Center Popup Enabled** parameter is cleared and the user ID has the appropriate authorizations on the User Extensions form.
3. Select **End All**.

Programmer Notes

This section provides information for the programmer to run the forms based on the requisites of the ERP.

Web Service Connectors

Use this form to define all the Web services used by Infor Factory Track.

Note: Only programmers who are authorized to customize the Infor Factory Track application must define Web services on this form. Any changes that are performed on this form can cause the application to function incorrectly.