Infor Factory Track for SL Implementation Guide

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Contents

About this guide

This guide describes the implementation process and sequence for Infor Factory Track. For more information about configuring Factory Track tables, see the *Factory Track Online Help*.

About Infor Factory Track

Infor Factory Track is a comprehensive manufacturing, labor, and attendance operations and collection system. The application directly integrates to your ERP system, streaming up-to-date information directly to and from the shop floor. Infor Factory Track comprises three fully-integrated modules:

- Infor Shop Floor
- Infor Time Track
- Infor Warehouse Mobility

Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in Contacting Infor.

- *Bartender for Infor Factory Track Configuration Guide*
- *Infor Factory Track Guide to Technology*
- *Infor Factory Track Installation Guide*
- *Infor Factory Track Product Overview*
- *Infor SyteLine for Infor Factory Track Integration Guide*

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Implementing Factory Track

1

To begin implementing Infor Factory Track at your site, you must first create administrator profiles. The subsequent implementation steps will depend upon which configuration of Factory Track modules you are implementing. These module configurations are possible:

Warehouse Mobility:
For implementation instructions, see "Implementing Warehouse Mobility" on page 11.

Warehouse Mobility with Time Track:
For implementation instructions, see "Implementing Warehouse Mobility with Time Track" on page 17.

Shop Floor:
For implementation instructions, see "Implementing Shop Floor" on page 27.

Shop Floor with Time Track:
For implementation instructions, see "Implementing Shop Floor with Time Track" on page 33.

Shop Floor with Warehouse Mobility:
For implementation instructions, see "Implementing Shop Floor with Warehouse Mobility" on page 43.

Shop Floor with Time Track and Warehouse Mobility:
For implementation instructions, see "Implementing Shop Floor with Time Track and Warehouse Mobility" on page 51.

Time Track:
For implementation instructions, see "Implementing Time Track" on page 61.

Verifying views and testing your connection

To ensure that your integration to the ERP is set up correctly, you must verify that views have been generated and test your connection.

Verifying views

1. Open the Site Parameters form.
2. In the Form Component Views section, verify that a date and time is displayed in the **Last Generated** field next to each view button. If a date and time are not displayed next to one of the buttons, select that button.

Testing your connection

1. Open the Site Parameters form.
2. On the **SyteLine Communication** tab, click **Test Connection**.

Creating administrator user profiles

You must create “super user” profiles for users who will administer the system, such as the IT administrator, the implementation consultant, and project leader.

Creating a super user profile

To create a super user profile:

Note: You should create unique super user profiles for all users who will administer the system. Users should not use the SA account after the initial installation.

1. Open the Users form.
2. Specify the profile details, such as the user ID and password.
3. Assign the profile to the FactoryTrackBase module using the **User Modules** button.
4. Select the **Super User** check box.
5. Save the profile.

   See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Implementing Warehouse Mobility

2

To implement only the Warehouse Mobility module, you must complete these tasks:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure transaction parameters
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- TTHomePage
- User
- WMBase
- WMGETIT
- WMMAKEIT
- WMMOVEIT
- WMSHIPIT

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1. Open the Groups form.
2. Select a group from the grid.
3. Click the **Group Authorizations** button.
4. Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a. If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5. Repeat these steps for each group.

   See *Object Authorization for Group* in the online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1. Open the Users form.
2. Specify the user ID.
3. Clear the **Super User** check box.
4. Optionally, specify a first and last name.
5. Leave the password fields blank, unless your site has special needs.
6. In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7. Assign the profile to the FactoryTrackBase and FactoryTrackWMTrans modules using the **User Modules** button.
8. Save the profile.

   See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 In the **ERP Shift** field, specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.

2 Specify this information:

Auto Open Work Center Form when Job active
Select this checkbox, to display the auto pop up Work Center UI transaction from work center navigation home page if at least one open active task for the employee exists.

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Allow Multiuse of Resource
When this check box is set to yes, multiple jobs can run on the same resource at the same time. When this check box is set to No, only one job is allowed to run on a resource at a time.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Combine Labor and Quantity
Select this checkbox to post both labor and quantities as single transaction (Run) in CSI.

Containers In Use
Select this check box to use containers.

CSI Attendance General Indirect Code
Select this checkbox to create gap records when the employee does not have a indirect task set.

Display Resource ID
Select this check box to display the resource ID field on Shop Floor transaction forms. Time Track transaction forms use this parameter as well.

Allow Job Resources Only
When Display Resource ID is set to Yes, select this check box to restrict user to use only job related resources to use. The display list contains the list of all resources configured for the job. Jason can you please confirm this.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Enter Lot Attributes (N=Never, A=Always, K=Ask)
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

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

Process Labor
Select this check box to process labor for the selected ERP.

Infor CloudSuite Industrial Time And Attendance Implemented
Select this check box to enable the Time and Attendance module for Infor CloudSuite Industrial.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

3. Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

Set up the tables and forms in this sequence:

1. Add supervisors and administrators to work groups.
2. Optionally, configure badges.
3. Configure transaction parameters. See "Configuring transaction parameters" on page 15.

Configuring transaction parameters

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms and mobile scanner transactions.

To set up label printing:

1. Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2. Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.
3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Warehouse Mobility with Time Track

3

To implement the Warehouse Mobility and Time Track modules, you must complete these tasks:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure Time Track tables
- Configure transaction parameters
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- TTHomePage
- User
- WMBase
- WMGETIT
- WMMAKEIT
- WMMOVEIT
- WMSHIPIT

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1. Open the Groups form.
2. Select a group from the grid.
3. Click the **Group Authorizations** button.
4. Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a. If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5. Repeat these steps for each group.

   See *Object Authorization for Group* in the online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1. Open the Users form.
2. Specify the user ID.
3. Clear the **Super User** check box.
4. Optionally, specify a first and last name.
5. Leave the password fields blank, unless your site has special needs.
6. In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7. Assign the profile to the FactoryTrackBase module using the **User Modules** button.
8. Assign the profile to these additional modules based on your needs:

   FactoryTrackTTTrans:
   Allows access to all forms that are exclusively Time Track forms.

FactoryTrackWMTrans:

Allows access to all forms that are exclusively Warehouse Mobility forms.

FactoryTrackWMTTTrans:

Allows access to all Warehouse Mobility forms that are used with Time Track.

9 Save the profile.

See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 Specify this information:

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular site.

ERP Code
Specify an ERP code. Typically, a site code for Infor Factory Track is specified in the underlying ERP software. The ERP code specified on the Site Parameters form must match the Infor Factory Track site code specified in the ERP.

ERP Shift
Specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Allow Offset Posting
Select this check box to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by a post of -4 hours. Clear **Allow Offset Posting** to display an ERP error in response to frozen posts.

Allow Repost
Select this check box to allow edited transactions to repost to the ERP system. Clear this check box to display an ERP error in response to reposted transactions.

Use Global Posting
Select this check box to specify how to prevent posting of records sharing a specific employee number and report date combination when one or more records contains an error. For example, an employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all four records. Clear this check box to post records 1, 2, and 4, and to block only record 3.

Post Start End Times to ERP
Select this check box to report shift start and end times to ERP even when those times occur on separate days. Clear this field to always report shift start and end times on the same day in accordance with the configuration settings of the shift.

3 Click **Save**.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.
2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

3 Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

Set up the tables and forms in this sequence:

1. Create and configure facilities.
2. Create and configure departments.
3. Configure premium codes.
4. Configure time off groups.
5. Configure site holidays.
6. Configure facility holidays.
7. Configure indirect tasks. See "Configuring the Tasks form" on page 22.
8. Configure absence codes. See "Configuring the Absences form" on page 23.
9. Set up payroll schedules.
10. Configure reduction sets.
11. Configure shifts. See "Configuring the Shifts form" on page 23.
12. If applicable, configure shift patterns and generate a shift pattern calendar.
13. Add supervisors and administrators to work groups.

14 Configure employee types. See "Configuring employee types" on page 24.

15 Optionally, configure badges.

16 Configure employees.

17 Configure transaction parameters. See "Configuring transaction parameters" on page 25.

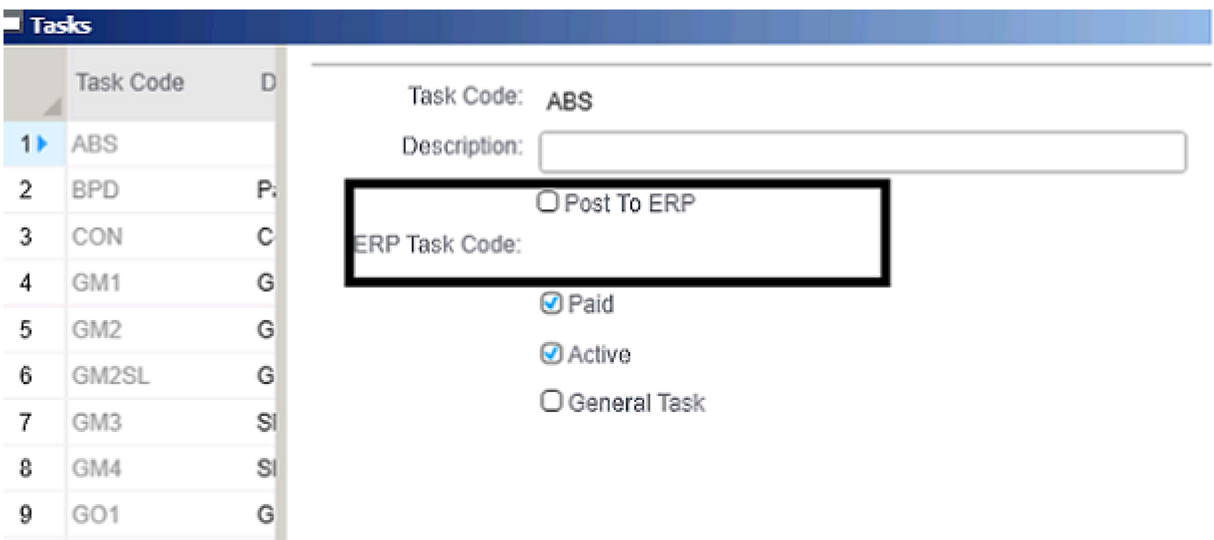
18 Specify a default selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

19 Optionally, specify alternate selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

Configuring the Tasks form

To configure the Tasks form:

1 Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.

3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

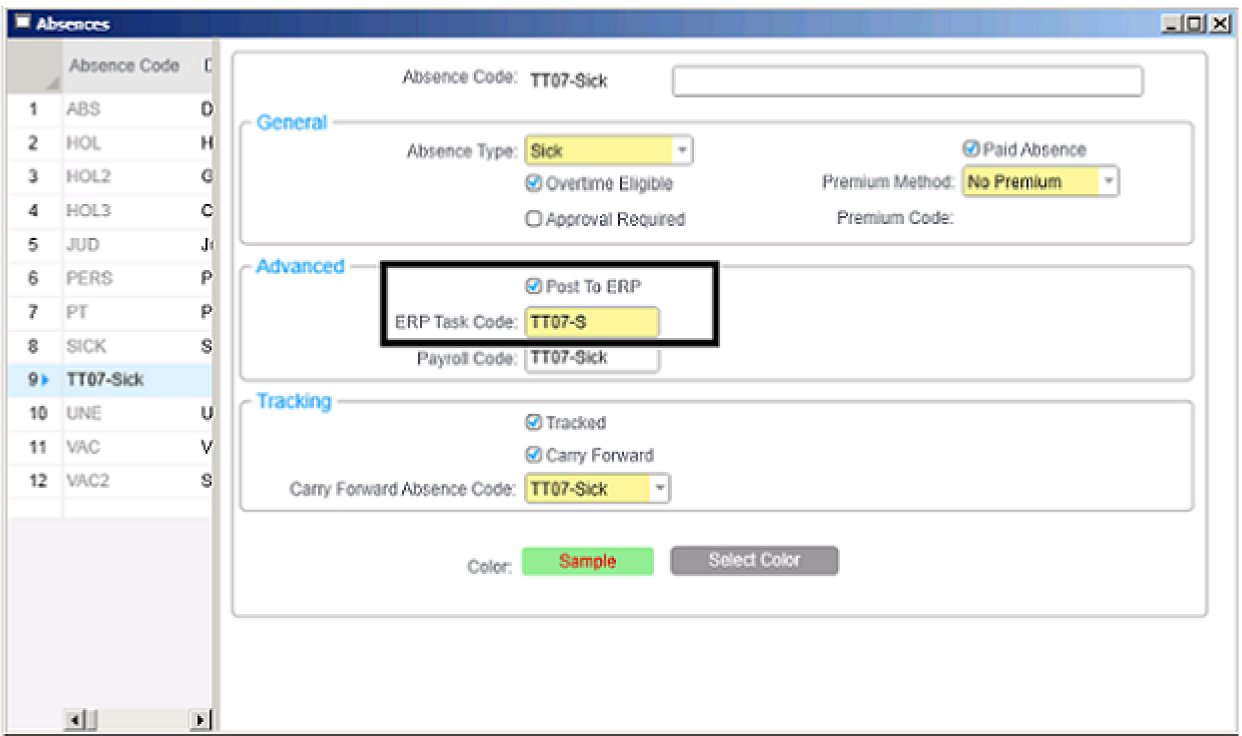
Configuring Time Track tables

To implement Time Track, you must configure a few time and attendance tables.

Configuring the Absences form

To configure the Absences form:

1. Open the Absences form.
2. Select or clear the **Post to ERP** field for each absence code to specify whether time recorded with that code will post to the ERP system.

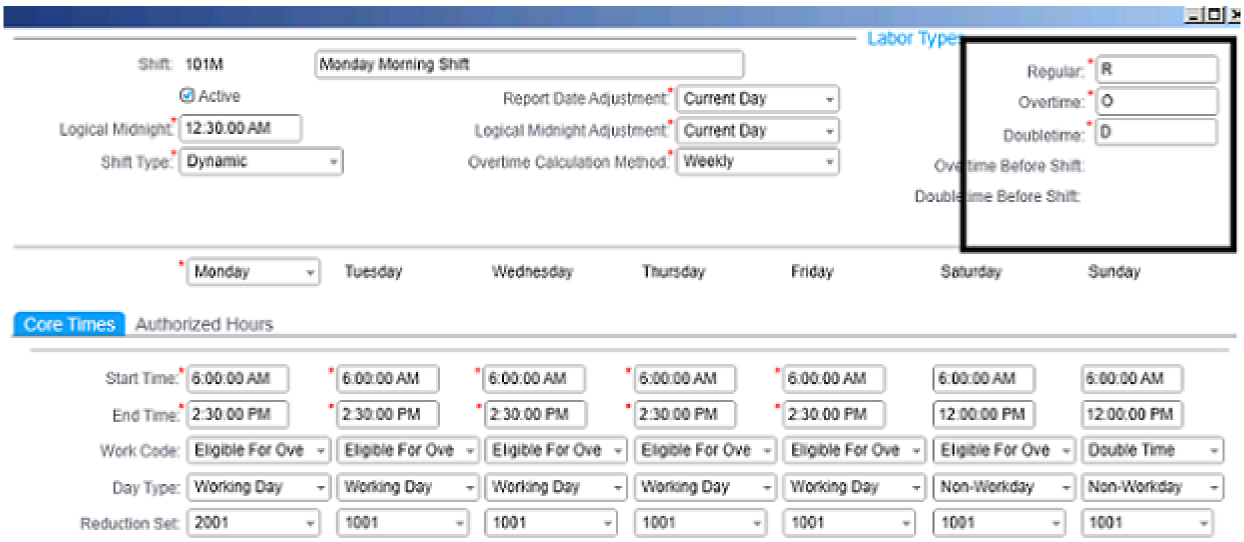


3. The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which absence hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, absence hours will not post to the ERP system.

Configuring the Shifts form

To configure the Shifts form:

1. Open the Shifts form.

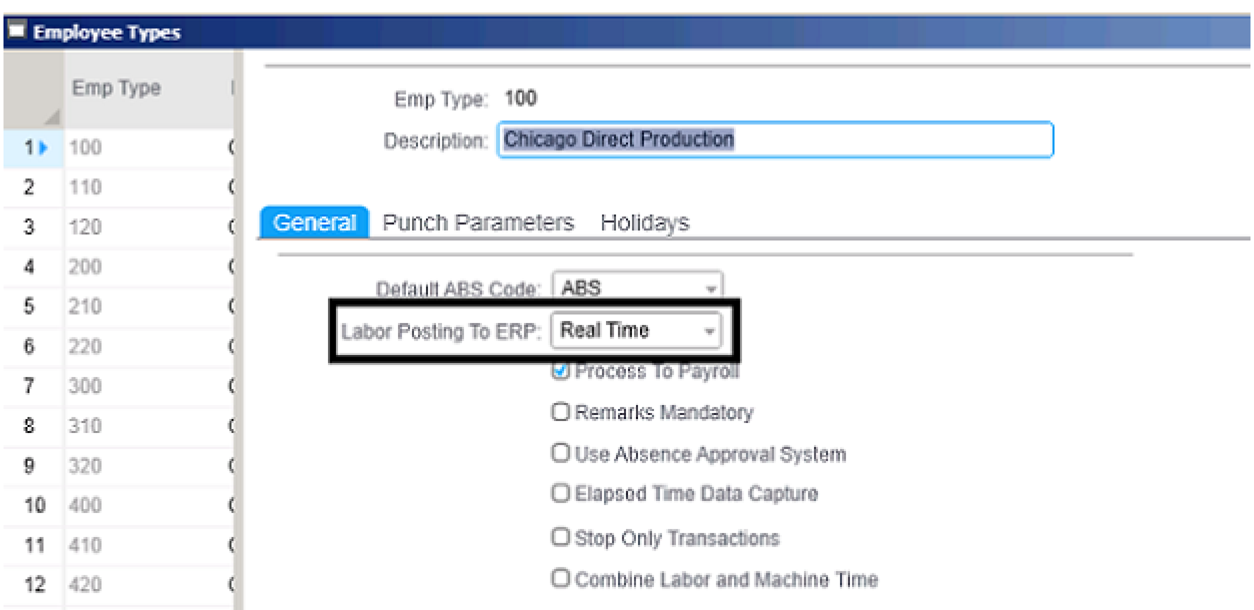


2 In the Labor Type section, specify the codes under which regular, overtime, and double time hours will post to the ERP system.

Configuring employee types

To configure employee types:

1 Open the Employee Types form.



2 In the **Labor Posting to ERP** field on the **General** tab, specify when or whether labor hours will post to the underlying ERP. The default value is Real Time, which posts labor when a job stops,

when an hours record is processed, or when you click **Save**. After Processing posts hours only when an hours record is processed. Do Not Post never posts recorded hours to the underlying ERP.

Configuring transaction parameters

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms, Shop Floor touch-screen forms, and mobile scanner transactions.

To set up label printing:

1. Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2. Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.
3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Shop Floor

4

To implement only the Shop Floor module, you must complete these tasks:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure transaction parameters
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- User

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1 Open the Groups form.
2 Select a group from the grid.
3 Click the **Group Authorizations** button.
4 Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5 Repeat these steps for each group.
   See the *Object Authorization for Group* topic in the Infor Factory Track online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1 Open the Users form.
2 Specify the user ID.
3 Clear the **Super User** check box.
4 Optionally, specify a first and last name.
5 Leave the password fields blank, unless your site has special needs.
6 In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7 Assign the profile to the FactoryTrackBase and FactoryTrackShopFloorTrans modules using the **User Modules** button.
8 Save the profile.
   See the *Users* topic in the online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 In the **ERP Shift** field, specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.

2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

3 Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

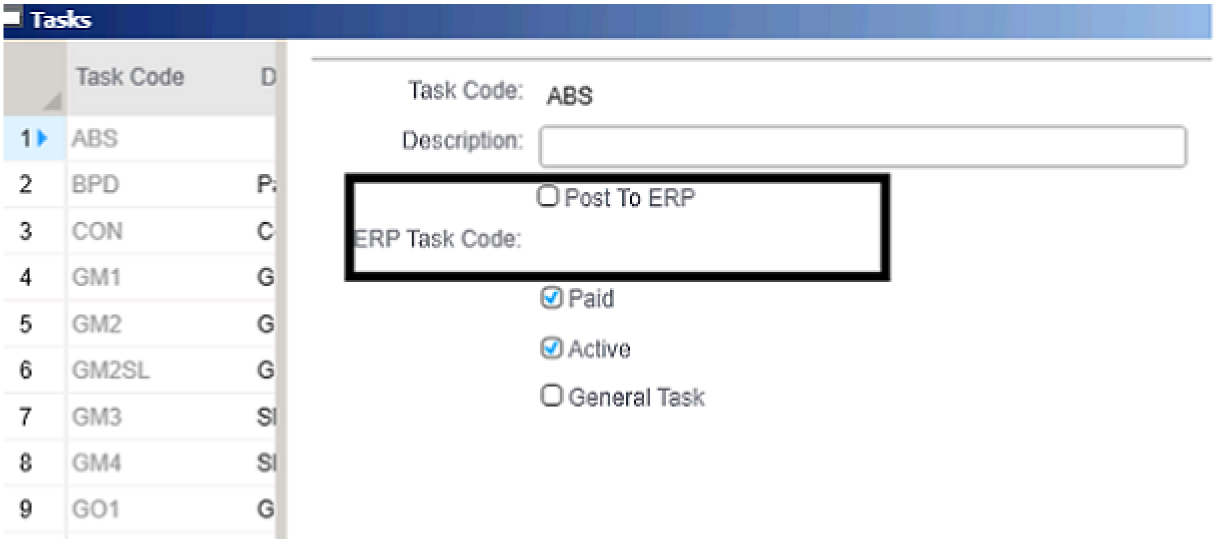
Set up the tables and forms in this sequence:

1 Configure indirect tasks. See "Configuring the Tasks form" on page 30.
2 Add supervisors and administrators to work groups.
3 Optionally, configure badges.
4 Configure employees.
5 Configure transaction parameters. See "Configuring transaction parameters" on page 31.

Configuring the Tasks form

To configure the Tasks form:

1 Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.
3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

Configuring transaction parameters

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms and Shop Floor touch-screen forms.

To set up label printing:

1 Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2 Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.

3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Shop Floor with Time Track

5

To implement only the Shop Floor and Time Track modules, you must complete these tasks in this sequence:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure Time Track tables
- Configure transaction parameters
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- TTHomePage
- User

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1. Open the Groups form.
2. Select a group from the grid.
3. Click the **Group Authorizations** button.
4. Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a. If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5. Repeat these steps for each group.

   See the *Object Authorization for Group* topic in the Infor Factory Track online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1. Open the Users form.
2. Specify the user ID.
3. Clear the **Super User** check box.
4. Optionally, specify a first and last name.
5. Leave the password fields blank, unless your site has special needs.
6. In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7. Assign the profile to the FactoryTrackBase module using the **User Modules** button.
8. Assign the profile to these additional modules based on your needs:

   FactoryTrackShopFloorTrans:
   Allows access to forms that are exclusively Shop Floor forms.

   FactoryTrackShopFloorTTTrans:
   Allows access to Shop Floor forms that are used with Time Track.

   FactoryTrackTTTrans:
   Allows access to forms that are exclusively Time Track forms.

9. Save the profile.

   See the *Users* topic in the online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 Specify this information:

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular site.

ERP Code
Specify an ERP code. Typically, a site code for Infor Factory Track is specified in the underlying ERP software. The ERP code specified on the Site Parameters form must match the Infor Factory Track site code specified in the ERP.

ERP Shift
Specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Allow Offset Posting
Select this check box to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by a post of -4 hours. Clear **Allow Offset Posting** to display an ERP error in response to frozen posts.

Allow Repost
Select this check box to allow edited transactions to repost to the ERP system. Clear this check box to display an ERP error in response to reposted transactions.

Use Global Posting
Select this check box to specify how to prevent posting of records sharing a specific employee number and report date combination when one or more records contains an error. For example, an employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all four records. Clear this check box to post records 1, 2, and 4, and to block only record 3.

Post Start End Times to ERP
Select this check box to report shift start and end times to ERP even when those times occur on separate days. Clear this field to always report shift start and end times on the same day in accordance with the configuration settings of the shift.

3 Click **Save**.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.
2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

3 Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

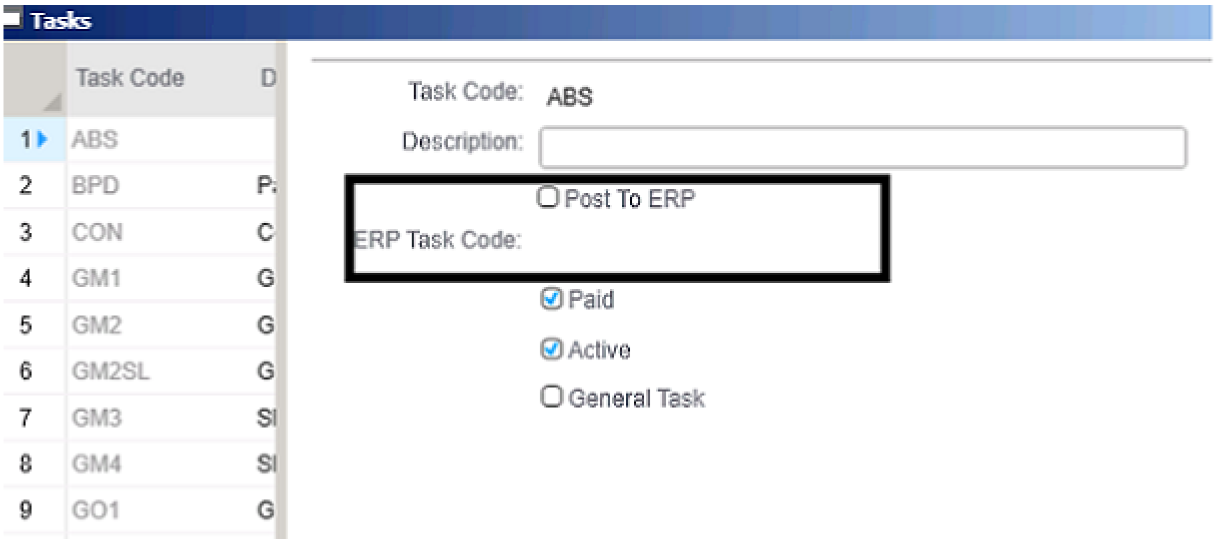
Set up the tables and forms in this sequence:

1. Create and configure facilities.
2. Create and configure departments.
3. Configure premium codes.
4. Configure time off groups.
5. Configure site holidays.
6. Configure facility holidays.
7. Configure indirect tasks. See "Configuring the Tasks form" on page 38.
8. Configure absence codes. See "Configuring the Absences form" on page 38.
9. Set up payroll schedules.
10. Configure reduction sets.
11. Configure shifts. See "Configuring the Shifts form" on page 39.
12. If applicable, configure shift patterns and generate a shift pattern calendar.
13. Add supervisors and administrators to work groups.
14. Configure employee types. See "Configuring employee types" on page 40.
15. Optionally, configure badges.
16. Configure employees.
17. Configure transaction parameters. See "Configuring transaction parameters" on page 41.
18. Specify a default selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.
19. Optionally, specify alternate selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

Configuring the Tasks form

To configure the Tasks form:

1 Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.

3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

Configuring Time Track tables

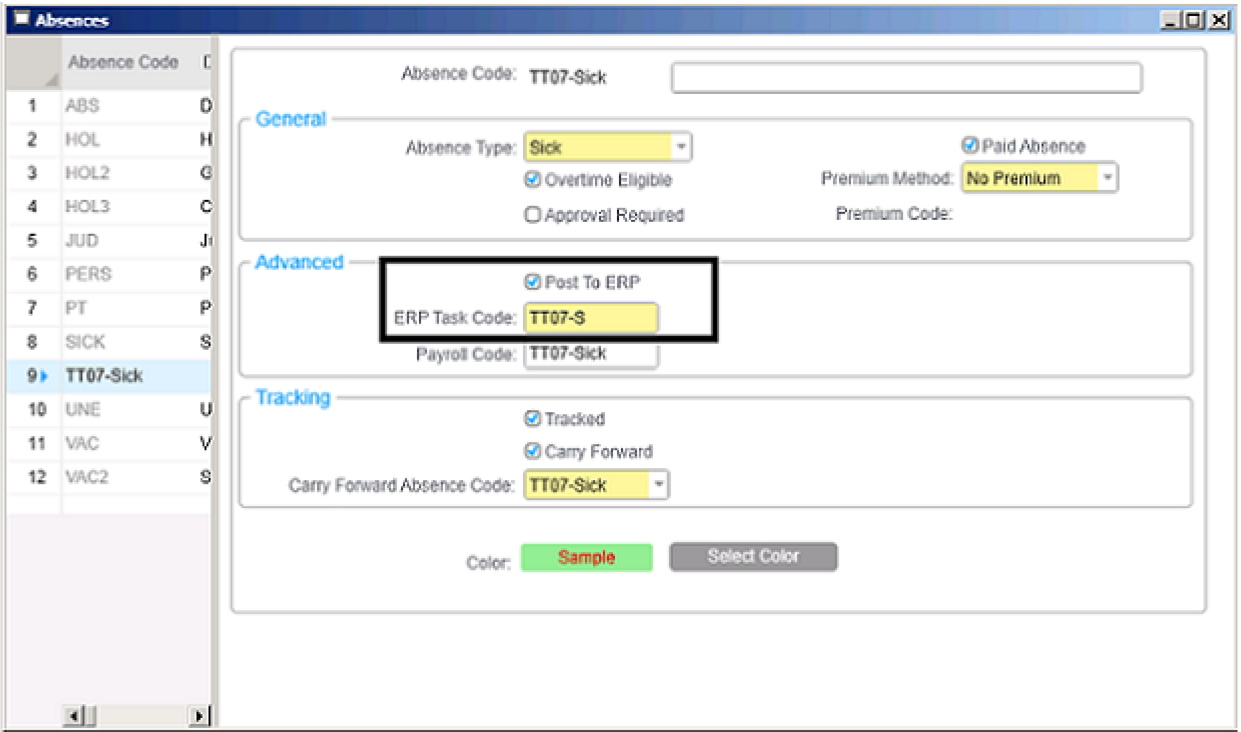
To implement Time Track, you must configure a few time and attendance tables.

Configuring the Absences form

To configure the Absences form:

1 Open the Absences form.

2 Select or clear the **Post to ERP** field for each absence code to specify whether time recorded with that code will post to the ERP system.

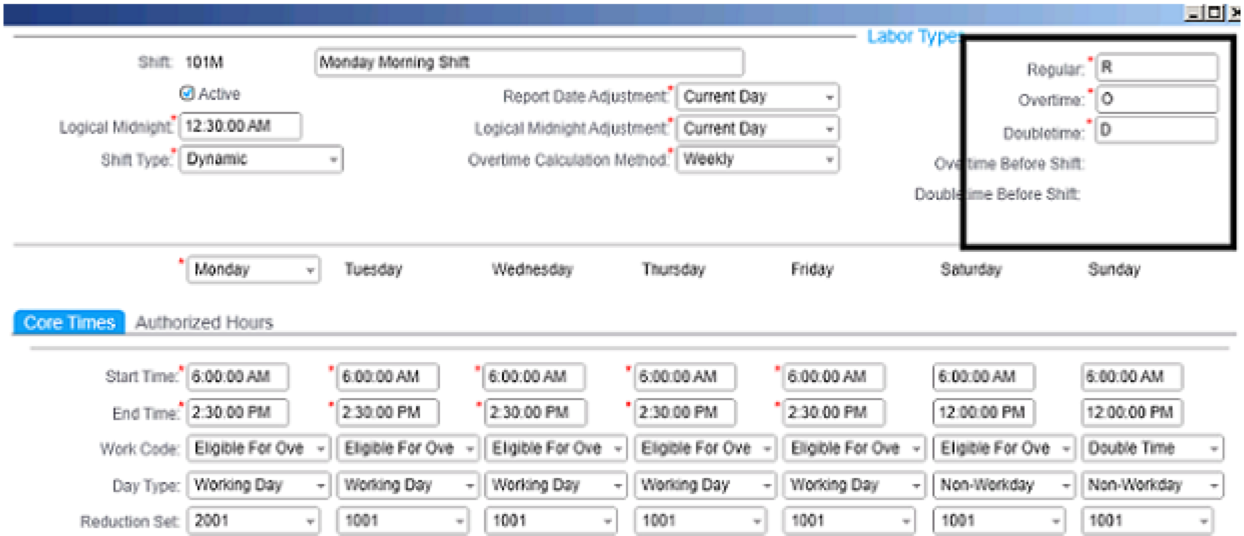


3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which absence hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, absence hours will not post to the ERP system.

Configuring the Shifts form

To configure the Shifts form:

1 Open the Shifts form.

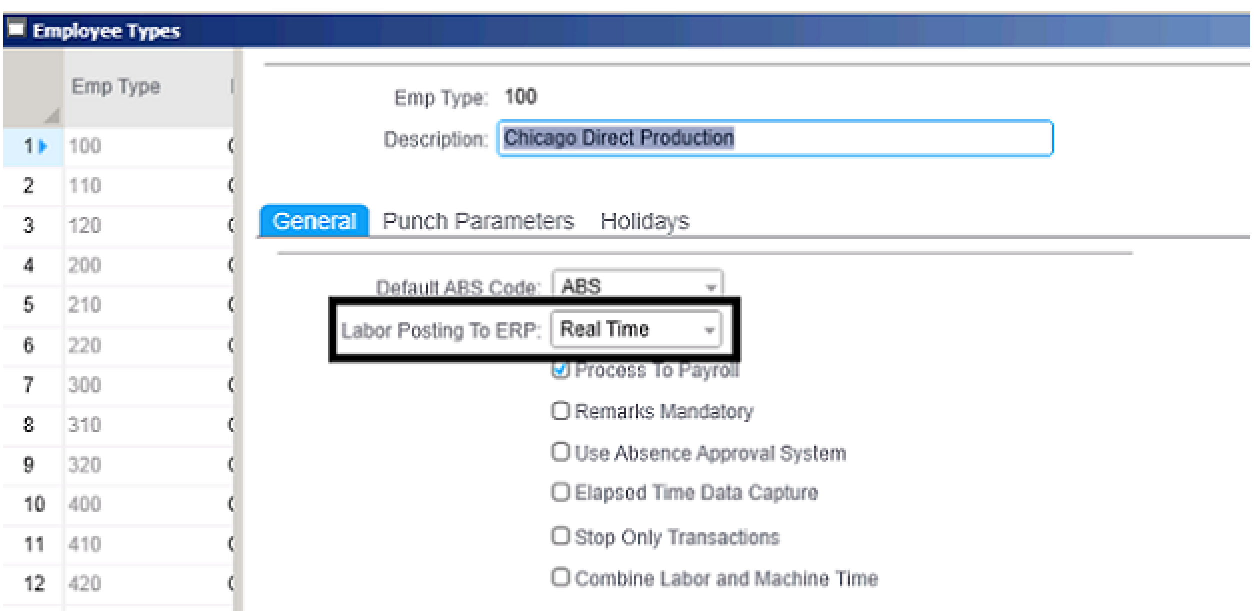


2 In the Labor Type section, specify the codes under which regular, overtime, and double time hours will post to the ERP system.

Configuring employee types

To configure employee types:

1 Open the Employee Types form.



2 In the **Labor Posting to ERP** field on the **General** tab, specify when or whether labor hours will post to the underlying ERP. The default value is Real Time, which posts labor when a job stops,

when an hours record is processed, or when you click **Save**. After Processing posts hours only when an hours record is processed. Do Not Post never posts recorded hours to the underlying ERP.

Configuring transaction parameters

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms, Shop Floor touch-screen forms, and mobile scanner transactions.

To set up label printing:

1. Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2. Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.
3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Shop Floor with Warehouse Mobility

6

To implement the Shop Floor and Warehouse Mobility modules, you must complete these tasks in this sequence:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure Time Track tables
- Configure transaction settings
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- User
- WMBase
- WMGETIT
- WMMAKEIT
- WMMOVEIT
- WMSHIPIT

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1. Open the Groups form.
2. Select a group from the grid.
3. Click the **Group Authorizations** button.
4. Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a. If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5. Repeat these steps for each group.

   See *Object Authorization for Group* topic in the Infor Factory Track online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1. Open the Users form.
2. Specify the user ID.
3. Clear the **Super User** check box.
4. Optionally, specify a first and last name.
5. Leave the password fields blank, unless your site has special needs.
6. In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7. Assign the profile to the FactoryTrackBase module using the **User Modules** button.
8. Assign the profile to these additional modules based on your needs:

   FactoryTrackShopFloorTrans:
   Allows access to forms that are exclusively Shop Floor forms.

FactoryTrackWMTrans:
Allows access to all forms that are exclusively Warehouse Mobility forms.

9 Save the profile.

See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.

2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

Auto Open Work Center Form when Job active
Select this checkbox, to display the auto pop up WorkCentre UI transaction from work center navigation home page if at least one open active task for the employee exists.

Allow Multiuse of Resource
When this check box is set to yes, multiplue jobs can run on the same resource at the same time. When this check box is set to No, only one job is allowed to run on a resource at a time.

Combine Labor and Quantity
Select this checkbox to post both labor and quantities as single transaction (Run) in CSI.

Display Resource ID
Select this check box to display the resource ID field on Shop Floor transaction forms. Time Track transaction forms use this parameter as well.

Allow Job Resources Only
When Display Resource ID is set to Yes, select this check box to restrict user to use only job related resources to use. The display list contains the list of all resources configured for the job. Jason can you please confirm this.

CSI Attendance General Indirect Code
Select this checkbox to create gap records when the employee does not have a indirect task set.

Process Labor
Select this check box to process labor for the selected ERP.

Infor CloudSuite Industrial Time And Attendance Implemented
Select this check box to enable the Time and Attendance module for Infor CloudSuite Industrial.

3 Click **Save**.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1. Open the Site Parameters form.
2. In the **ERP Shift** field, specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

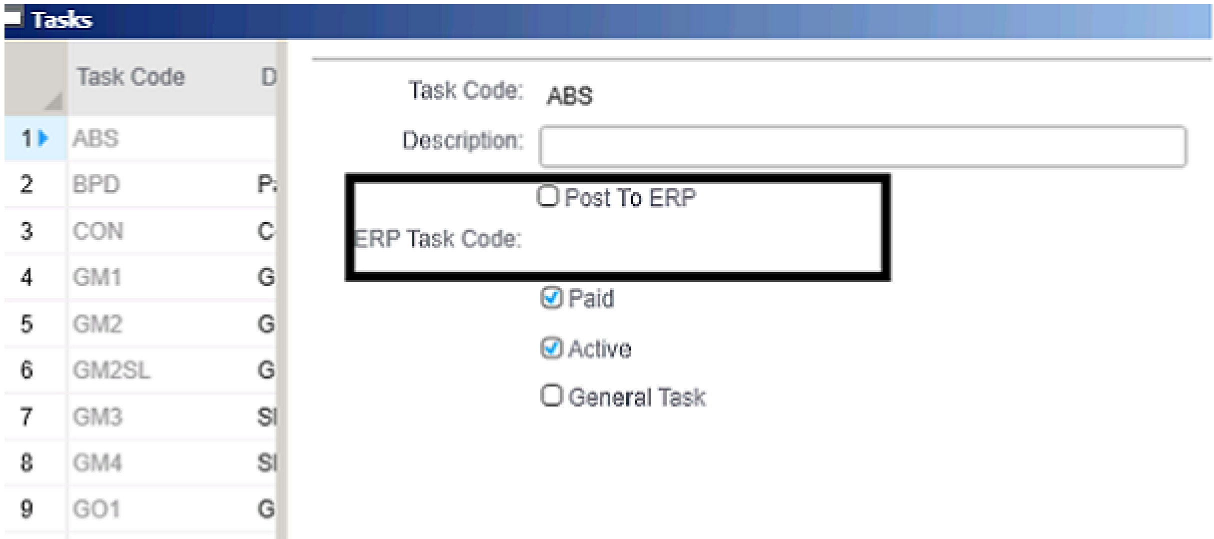
Set up the tables and forms in this sequence:

1. Configure indirect tasks. See "Configuring the Tasks form" on page 47.
2. Add supervisors and administrators to work groups.
3. Optionally, configure badges.
4. Configure employees.
5. Configure transaction parameters. See "Configuring transaction settings" on page 48.

Configuring the Tasks form

To configure the Tasks form:

1. Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.

3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

Configuring transaction settings

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms, Shop Floor touch-screen forms, and mobile scanner transactions.

To set up label printing:

1 Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.

2 Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.

3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Shop Floor with Time Track and Warehouse Mobility

7

To implement all three Factory Track modules, Shop Floor, Time Track, and Warehouse Mobility, you must complete these tasks in this sequence:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure Time Track tables
- Configure transaction settings
- Set up label printing

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- TTHomePage
- User
- WMBase
- WMGETIT
- WMMAKEIT
- WMMOVEIT
- WMSHIPIT

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1. Open the Groups form.
2. Select a group from the grid.
3. Click the **Group Authorizations** button.
4. Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a. If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5. Repeat these steps for each group.

   See *Object Authorization for Group* topic in the Infor Factory Track online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1. Open the Users form.
2. Specify the user ID.
3. Clear the **Super User** check box.
4. Optionally, specify a first and last name.
5. Leave the password fields blank, unless your site has special needs.
6. In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7. Assign the profile to the FactoryTrackBase module using the **User Modules** button.
8. Assign the profile to these additional modules based on your needs:

   FactoryTrackShopFloorTrans:
   Allows access to forms that are exclusively Shop Floor forms.

FactoryTrackShopFloorTTTrans:
Allows access to Shop Floor forms that are used with Time Track.

FactoryTrackTTTrans:
Allows access to forms that are exclusively Time Track forms.

FactoryTrackWMTrans:
Allows access to all forms that are exclusively Warehouse Mobility forms.

FactoryTrackWMTTTrans:
Allows access to all Warehouse Mobility forms that are used with Time Track.

9 Save the profile.

See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 Specify this information:

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular site.

ERP Code
Specify an ERP code. Typically, a site code for Infor Factory Track is specified in the underlying ERP software. The ERP code specified on the Site Parameters form must match the Infor Factory Track site code specified in the ERP.

ERP Shift
Specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Allow Offset Posting
Select this check box to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by a post of -4 hours. Clear **Allow Offset Posting** to display an ERP error in response to frozen posts.

Allow Repost
Select this check box to allow edited transactions to repost to the ERP system. Clear this check box to display an ERP error in response to reposted transactions.

Use Global Posting
Select this check box to specify how to prevent posting of records sharing a specific employee number and report date combination when one or more records contains an error. For example,

an employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all four records. Clear this check box to post records 1, 2, and 4, and to block only record 3.

Post Start End Times to ERP
Select this check box to report shift start and end times to ERP even when those times occur on separate days. Clear this field to always report shift start and end times on the same day in accordance with the configuration settings of the shift.

3 Click **Save**.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.
2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

3 Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

Set up the tables and forms in this sequence:

1 Create and configure facilities.
2 Create and configure departments.
3 Configure premium codes.
4 Configure time off groups.
5 Configure site holidays.
6 Configure facility holidays.
7 Configure indirect tasks. See "Configuring the Tasks form" on page 56.
8 Configure absence codes. See "Configuring the Absences form" on page 57.
9 Set up payroll schedules.

10 Configure reduction sets.

11 Configure shifts. See "Configuring the Shifts form" on page 57.

12 If applicable, configure shift patterns and generate a shift pattern calendar.

13 Add supervisors and administrators to work groups.

14 Configure employee types. See "Configuring employee types" on page 58.

15 Optionally, configure badges.

16 Configure employees.

17 Configure transaction parameters. See "Configuring transaction parameters" on page 59.

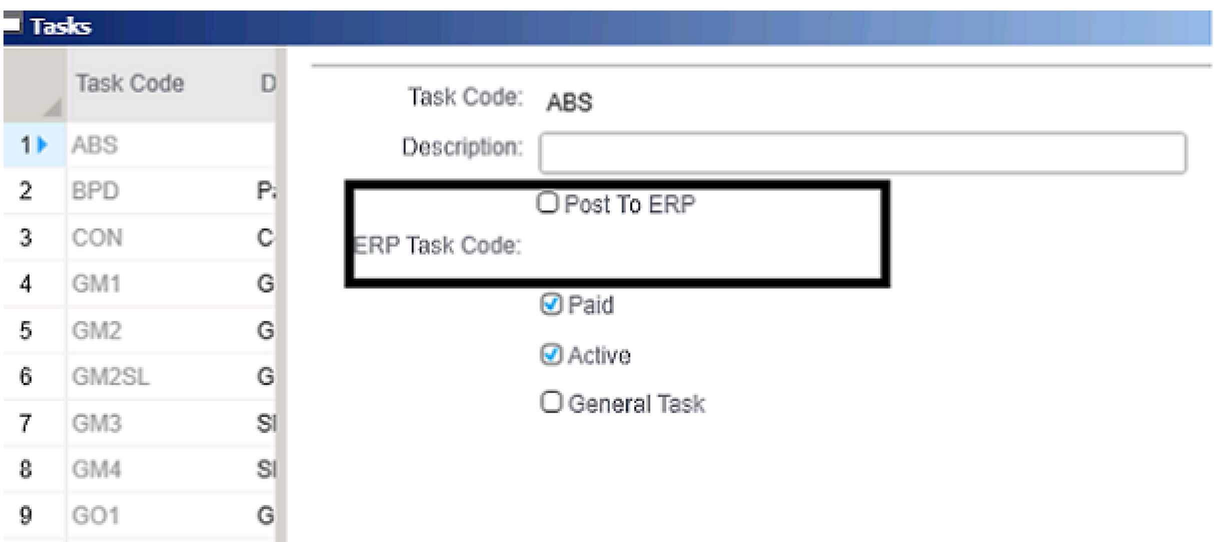
18 Specify a default selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

19 Optionally, specify alternate selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

Configuring the Tasks form

To configure the Tasks form:

1 Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.

3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

Configuring Time Track tables

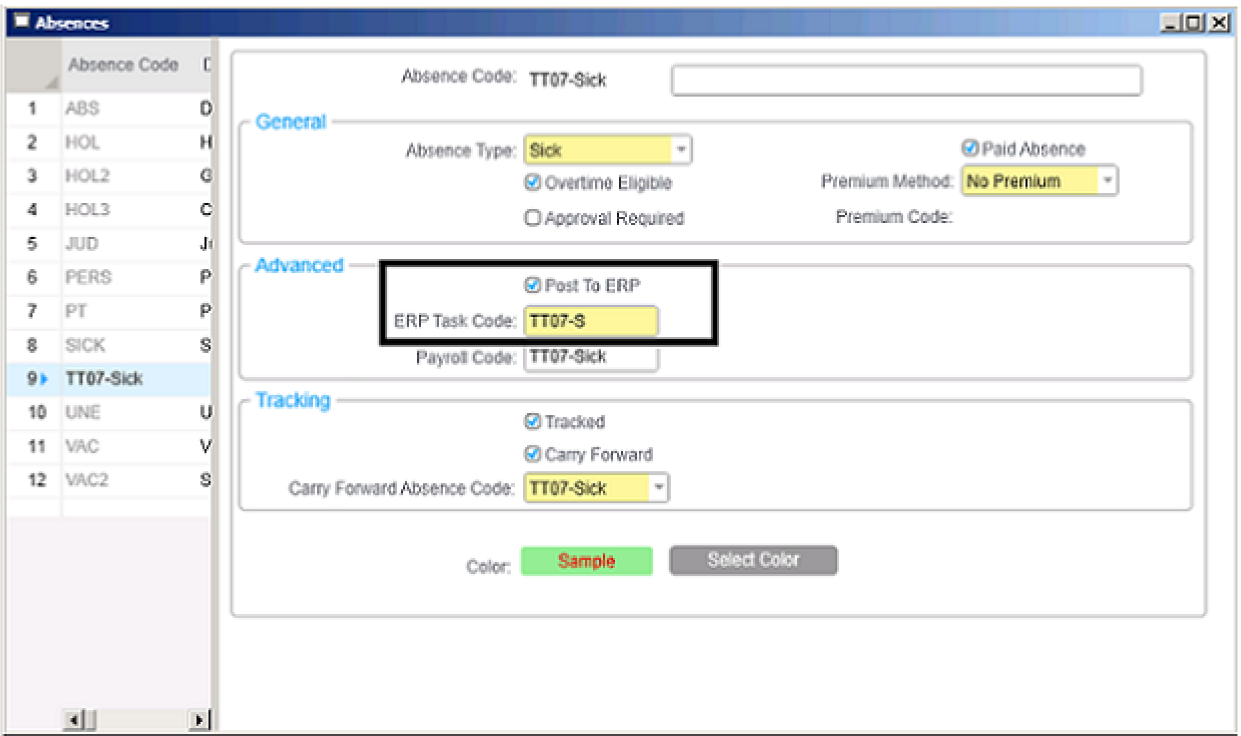
To implement Time Track, you must configure a few time and attendance tables.

Configuring the Absences form

To configure the Absences form:

1 Open the Absences form.

2 Select or clear the **Post to ERP** field for each absence code to specify whether time recorded with that code will post to the ERP system.

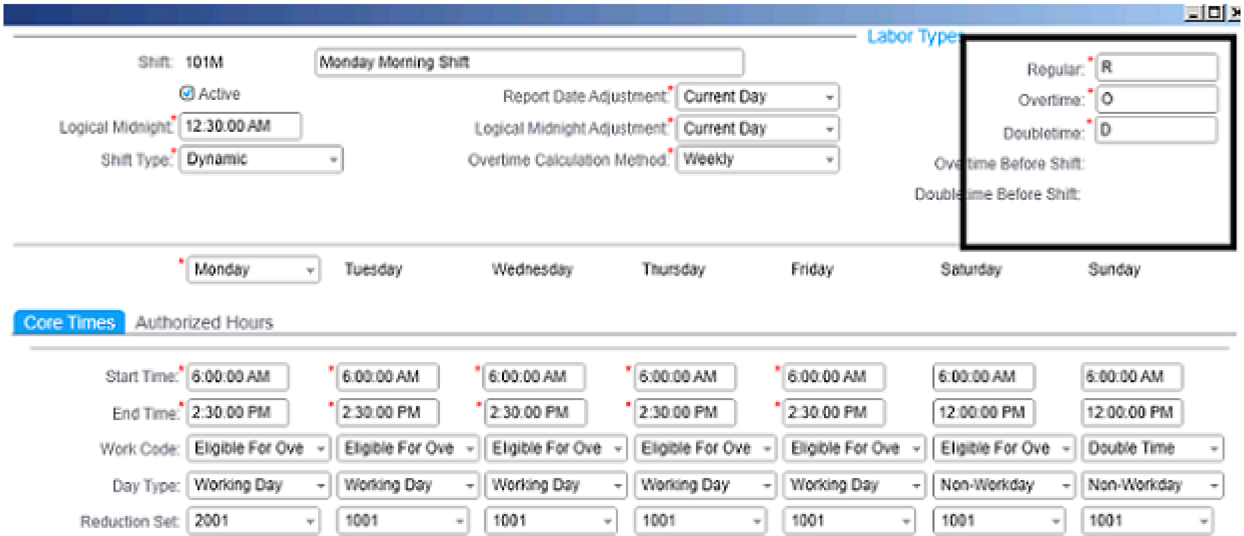


3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which absence hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, absence hours will not post to the ERP system.

Configuring the Shifts form

To configure the Shifts form:

1 Open the Shifts form.

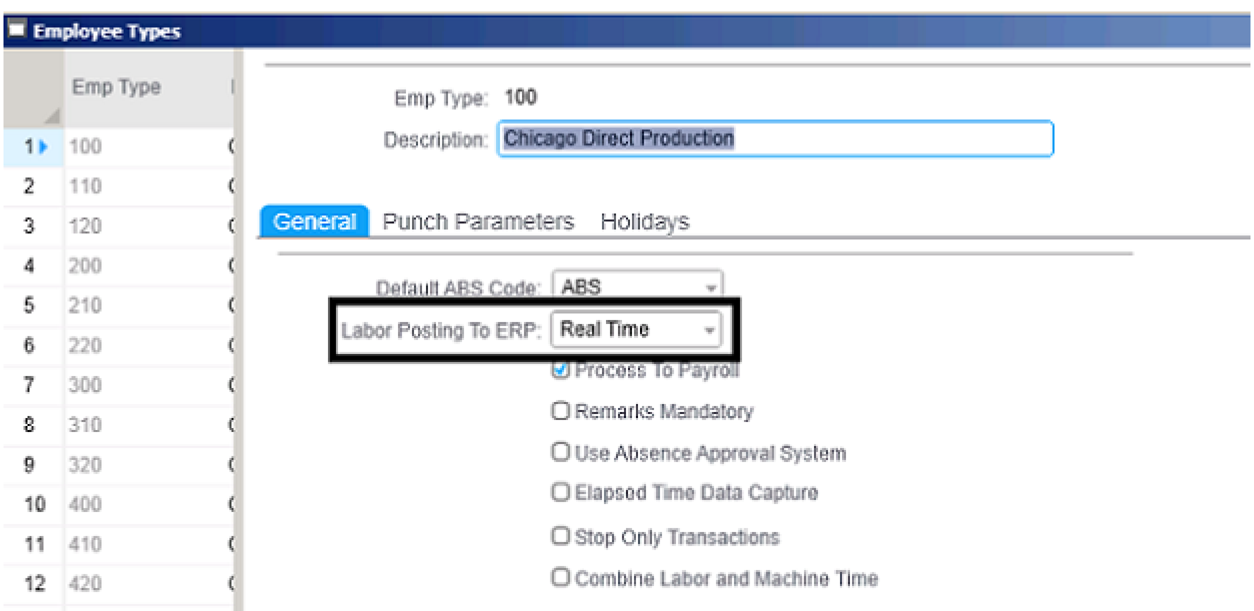


2 In the Labor Type section, specify the codes under which regular, overtime, and double time hours will post to the ERP system.

Configuring employee types

To configure employee types:

1 Open the Employee Types form.



2 In the **Labor Posting to ERP** field on the **General** tab, specify when or whether labor hours will post to the underlying ERP. The default value is Real Time, which posts labor when a job stops,

when an hours record is processed, or when you click **Save**. After Processing posts hours only when an hours record is processed. Do Not Post never posts recorded hours to the underlying ERP.

Configuring transaction parameters

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.

Setting up label printing

Many transactions in Infor Factory Track support barcode label printing. You can print labels from Factory Track Mongoose forms, Shop Floor touch-screen forms, and mobile scanner transactions.

To set up label printing:

1. Create label formats using the BarTender application. See the *Bartender for Infor Factory Track Configuration Guide* for more information.
2. Establish connections with the BarTender application using the Label Interface form. See the *Configuring Label Printing Connections* topic in the online help for more information.
3. Define label formats using the Label Formats form. See the *Defining Label Formats* topic in the online help for more information.
4. Optionally, add additional information fields to barcode labels using the Label Print Extensions form. See the *Adding Additional Fields to Barcode Labels* topic in the online help for more information.
5. Configure printers using the Label Printer Configuration form. See the *Configuring Printers* topic in the online help for more information.
6. Specify label formats and printers for transactions using the Transaction Warehouse Order Type Print Parameters form. See the *Configuring Label Printing Settings for Transactions* topic in the online help for more information.

Implementing Time Track

8

To implement only the Time Track module, you must complete these tasks:

- Confirm groups
- Confirm group authorizations
- Create user profiles
- Configure site parameters
- Configure global parameters
- Set up tables and forms in sequence
- Configure the Tasks form
- Configure Time Track tables
- Configure transaction parameters

Confirming groups

Use the Groups form to confirm that these groups are defined:

- Administrator
- Supervisor
- TeamLeader
- TTHomePage
- User

If the applicable groups are not defined, or there are other groups defined in their place, such as Kiosk User instead of User, contact Infor customer service. Do not delete any additional groups that may also be defined.

Confirming group authorizations

Use the Groups form to confirm that each group is authorized to use the appropriate objects.

To confirm group authorizations:

1 Open the Groups form.
2 Select a group from the grid.
3 Click the **Group Authorizations** button.
4 Verify that the appropriate objects and authorizations are listed. Each group should have access to the DashboardTransactions object.
   a If you receive access permission errors when attempting to open a form, ensure that the form is listed in the Object Name column. If the form is not listed, contact customer service.
5 Repeat these steps for each group.
   See *Object Authorization for Group* in the Infor Factory Track online help for more information.

Creating user profiles

Create user profiles for employees who will use Infor Factory Track web-based forms and mobile transactions.

To create a user profile:

1 Open the Users form.
2 Specify the user ID.
3 Clear the **Super User** check box.
4 Optionally, specify a first and last name.
5 Leave the password fields blank, unless your site has special needs.
6 In the **Editing Permissions** field, select **Basic** for administrators, and select **None** for all other users.
7 Assign the profile to the FactoryTrackBase and FactoryTrackTTTrans modules using the **User Modules** button.
8 Save the profile.
   See the *Users* topic in the Infor Factory Track online help for more information about creating user profiles.

Configuring site parameters

You must define parameters for communicating with the ERP server and test the connection.

To configure site parameters:

1 Open the Site Parameters form.

2 Specify this information:

Payroll Code
Optionally, specify a payroll code. Payroll codes identify each record as originating from a particular site.

ERP Code
Specify an ERP code. Typically, a site code for Infor Factory Track is specified in the underlying ERP software. The ERP code specified on the Site Parameters form must match the Infor Factory Track site code specified in the ERP.

ERP Shift
Specify an ERP shift code. The code specifies a Working Time Table (WTT), which is a generic 24/7 calendar specified in the ERP system.

Allow Offset Posting
Select this check box to automatically zero out frozen posts by posting an offsetting negative value; for example, a frozen post of 4 hours will be offset by a post of -4 hours. Clear **Allow Offset Posting** to display an ERP error in response to frozen posts.

Allow Repost
Select this check box to allow edited transactions to repost to the ERP system. Clear this check box to display an ERP error in response to reposted transactions.

Use Global Posting
Select this check box to specify how to prevent posting of records sharing a specific employee number and report date combination when one or more records contains an error. For example, an employee posts a group of four records in which the third record contains an error. Select this check box to block posting of all four records. Clear this check box to post records 1, 2, and 4, and to block only record 3.

Post Start End Times to ERP
Select this check box to report shift start and end times to ERP even when those times occur on separate days. Clear this field to always report shift start and end times on the same day in accordance with the configuration settings of the shift.

3 Click **Save**.

Configuring global parameters

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

To configure global parameters:

1 Open the Global Parameters form.

2 Specify this information:

Added Item Stock Room Location Permanent
Select this check box to keep permanent inventory transaction records. Clear this check box to keep temporary ones. If you move all items out of a location, a permanent inventory record will continue to associate that location with the item that was stored there. That location will then continue to be recommended as a stock location for that item. A temporary inventory record is deleted when you move all items out of a location, so, when using temporary inventory records, only locations with an existing stock of a given item will be recommended as stock locations for that item.

Allow Transaction If CycleCount
Select this check box to allow users to perform transactions involving items that are part of a cycle count. Clear this check box to prevent users from performing transactions involving cycle count items until the cycle count is completed.

Containers In Use
Select this check box to use containers.

Elapsed Time Cut Off
Specify the number of hours a job can be running before it is marked as an error record. You can use this parameter to prevent excessive hours from being clocked to a job in the event that an employee forgets to stop it.

Generate Serials
Select to automatically generate serial numbers.

List Zero Inventory Records
Select this check box to display inventory records that have a quantity of zero.

Maximum Decimal Length
Specify the maximum number of decimal values to allow in quantity fields. Any values that exceed this decimal limit are rounded. For example, if you specify 3, a value of 2.44571 will be rounded to 2.446.

SF Quantity Format
Specify the maximum number of decimal values to allow in quantity fields on forms associated with Shop Floor. This parameter is only applicable if you have the Shop Floor module implemented.

Supplier Lot is ERP Lot
Select this check box to automatically use the supplier lot number as you lot number.

Time Track is implemented
Select this check box to enable the Time Track module.

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

Allow Generic Employee to End Session
Select this check box to allow employees to end their session when signed in as a generic user.

Enter Lot Attributes
Specify whether users will specify lot attributes when they create a new lot. If you select **Ask**, the user will be given the option of whether to specify lot attributes.

Allow Negative Inventory
Select this check box to allow inventory to have a negative value after material is issued.

3 Click **Save**.

Setting up tables and forms in sequence

Because Factory Track tables and forms are dependent upon each other, you must set them up in the correct sequence during implementation. See the online help for more information about configuring specific tables or forms.

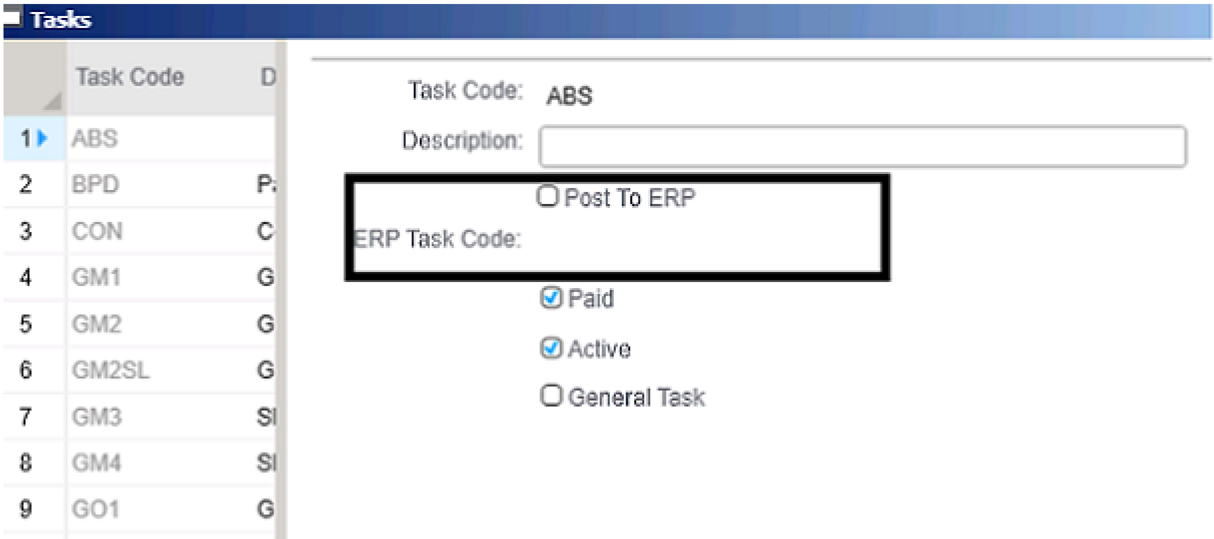
Set up the tables and forms in this sequence:

1. Create and configure facilities.
2. Create and configure departments.
3. Configure premium codes.
4. Configure time off groups.
5. Configure site holidays.
6. Configure facility holidays.
7. Configure indirect tasks. See "Configuring the Tasks form" on page 38.
8. Configure absence codes. See "Configuring the Absences form" on page 66.
9. Set up payroll schedules.
10. Configure reduction sets.
11. Configure shifts. See "Configuring the Shifts form" on page 67.
12. If applicable, configure shift patterns and generate a shift pattern calendar.
13. Add supervisors and administrators to work groups.
14. Configure employee types. See "Configuring employee types" on page 68.
15. Optionally, configure badges.
16. Configure employees.
17. Configure transaction parameters. See "Configuring transaction settings" on page 69.
18. Specify a default selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.
19. Optionally, specify alternate selection criteria for the Hours Summary, Elapsed Time Summary, and Payroll Summary forms.

Configuring the Tasks form

To configure the Tasks form:

1. Open the Tasks form.



2 Select or clear the **Post to ERP** field for each task code to specify whether time recorded with that code will post to the ERP system.
3 The **ERP Task Code** field is only available if **Post to ERP** is selected. In the **ERP Task Code** field for each absence code, specify the code under which task hours will post to the ERP system. The specified code must be valid and active in the ERP system for the hours to post successfully. If you leave this field blank, task hours will not post to the ERP system.

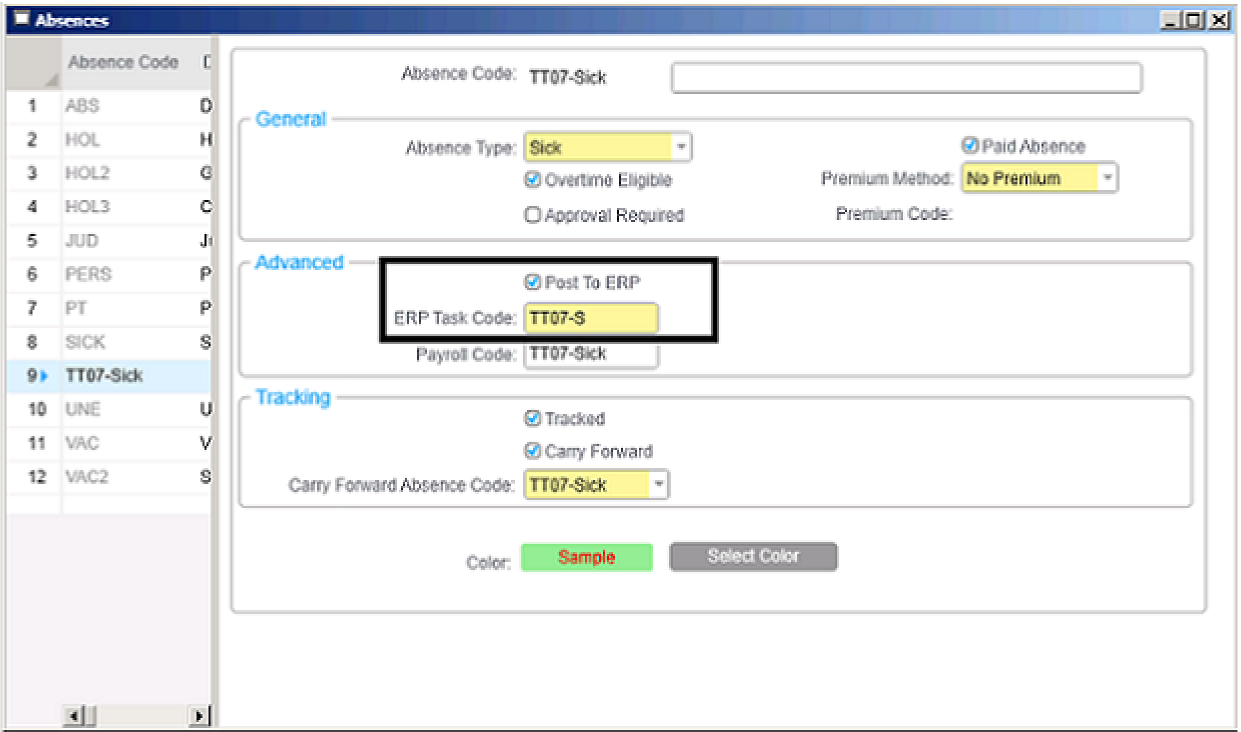
Configuring Time Track tables

To implement Time Track, you must configure a few time and attendance tables.

Configuring the Absences form

To configure the Absences form:

1. Open the Absences form.
2. Select or clear the **Post to ERP** field for each absence code to specify whether time recorded with that code will post to the ERP system.



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Configuring the Shifts form

To configure the Shifts form:

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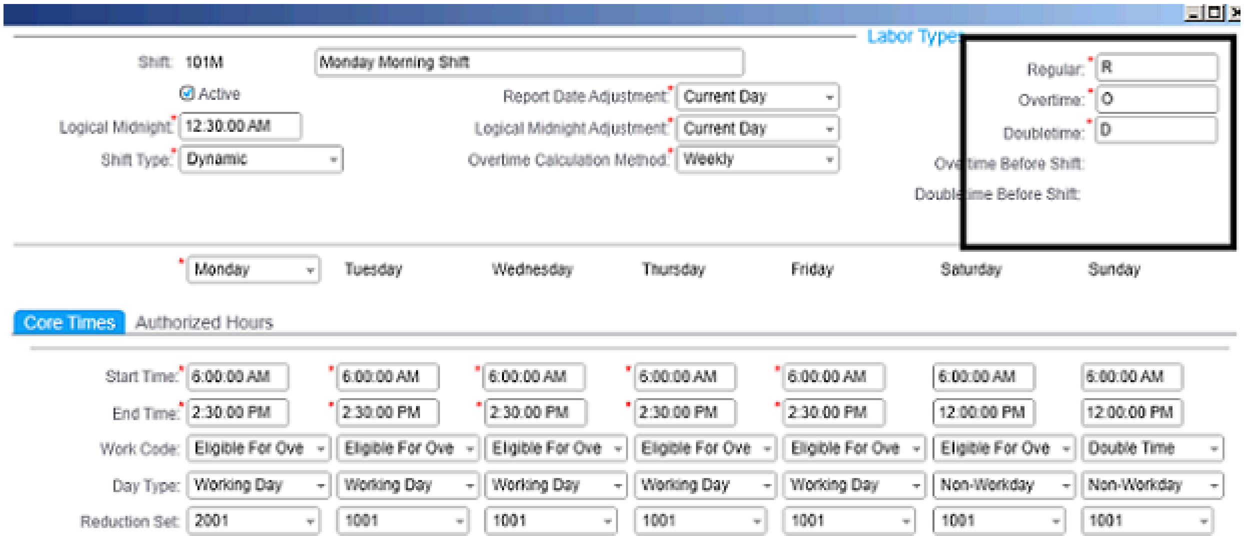
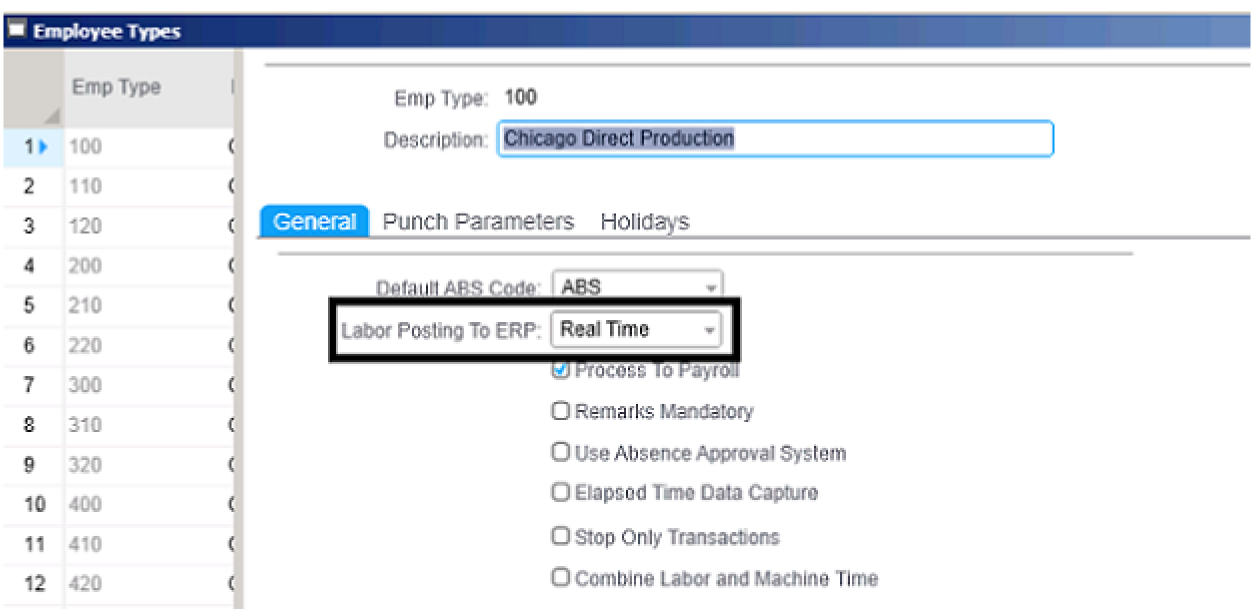


2 In the Labor Type section, specify the codes under which regular, overtime, and double time hours will post to the ERP system.

Configuring employee types

To configure employee types:

1 Open the Employee Types form.



2 In the **Labor Posting to ERP** field on the **General** tab, specify when or whether labor hours will post to the underlying ERP. The default value is Real Time, which posts labor when a job stops,

when an hours record is processed, or when you click **Save**. After Processing posts hours only when an hours record is processed. Do Not Post never posts recorded hours to the underlying ERP.

Configuring transaction settings

Use the Transaction Set Maintenance form to configure parameters for individual transactions. For more information about configuring transaction parameters, see the *Transaction Set Maintenance* topic in the online help.