TFG4000™

Common Applications

Users Guide

Version 1.4

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Welcome

The TFG4000 Software Series is a set of business management software applications that offer the robust functionality of an advanced management tool, yet tailored to meet the needs and budget of your growing business. Even better – every application in the TFG4000 Software Series is sold separately as a stand-alone product, which means you buy only what you need to run your operation more efficiently. For example, companies that only need to track and manage inventory are not forced to navigate through a multitude of unnecessary screens, but rather access the specific application that they need to perform their business operation. The added bonus of having every application in the TFG4000 Software Series is that each product recognizes the others and runs in harmony to provide you the optimum benefit of business management software.

TFG4000 is an easy-to-learn, user-friendly system that requires only minimal keystrokes for entering information. There are customizable dropdowns, font sizes, and screen colors available within the applications, as well as powerful search capabilities and built-in help features to help guide you through the system. With TFG4000, you have the ability to pull up various summary screens, enter as little or as much data as you need, process a variety of reports - all of which help you save both time and money, which will add directly to your bottom line. For added convenience, TFG4000 also allows you to run the system in either single or multi-user mode, whichever works best for your business. Other features include optional security, as well as data import and export features, which save you the work of re-keying information. In all, TFG4000™ is the smart source for business management. A simple solution for a complex process.

System Requirements

Microsoft® Windows® 98, Windows NT® 4.0, Windows® 2000, Windows® ME, or Windows XP®, with the latest Service Pack applied.

Pentium® class processor, 350mhz or greater.

90MB free disk space.

128MB of RAM (256MB recommended).

Network Interface Card configured to use TCP/IP if installing in multiple user mode (client / server

Starting TFG4000

Perform the following steps to start TFG4000 in either Single or Multiple User Mode:

Single User

1. Open the “Start” menu, and then select the “Program” option.

2. Select “TFG4000 V1.4" from the program list.

3. Select “TFG4000" to start.

4. The TFG4000 “Welcome” screen is displayed with the “Tip of the Day”. You can select “Close” to continue the start up process or select “Next Tip” to view more tips. You can also choose not to have the “Tip of the Day” appear by selecting the check box next to “Don’t show Tip of the Day at Startup” located on the Welcome screen. Select the check box again at any time to reinstate the “Tip of the Day” feature.

5. If you see a “User” and “Password” field on your screen, enter the User ID and Password that your System Administrator provided you, and either press “Enter” or click “Sign On”.

6. If your screen only displays “Welcome” without any other fields, then click the plus sign (“+”) next to the application you want to perform in the “NavTree”.

7. Click on the screen you would like to use.

Multiple User (Not available in the Demo Version)

Server Startup

At installation, the server component is put in the Startup folder of the Program List. It will automatically start at system start up. Perform this procedure only if necessary.

1. Open the “Start” menu, and then select the “Program” option.

2. Select “TFG4000 V1.4” from the program list.

3. Select “TFG4000 Server V1.4" to start.

4. The TFG4000 “Welcome” screen is displayed with the “Tip of the Day”. You can select “Close” to continue the start up process or select “Next Tip” to view more tips. You can also choose not to have the “Tip of the Day” appear by selecting the check box next to “Don’t show Tip of the Day at Startup” located on the Welcome screen. Select the check box again at any time to reinstate the “Tip of the Day” feature.

Client Startup

1. Open the “Start” menu, and then select the “Program” option.

2. Select “TFG4000 V1.4" from the program list.

3. Select “TFG4000 Client v1.4" to start.

4. The TFG4000 “Welcome” screen is displayed with the “Tip of the Day”. You can select “Close” to continue the start up process or select “Next Tip” to view more tips. You can also choose not to have the “Tip of the Day” appear by selecting the check box next to “Don’t show Tip of the Day at Startup” located on the Welcome screen. Select the check box again at any time to reinstate the “Tip of the Day” feature.

5. If you see a “User” and “Password” field on your screen, enter the User ID and Password that your System Administrator provided you, and either press “Enter” or click “Sign On”.

6. If your screen only displays “Welcome” without any other fields, click the plus ign (“+”) next to the application you want to perform in the “NavTree”.

7. Click on the screen you would like to use.

Built-in Help

Help is available at the screen, field, and column level, as well as built-in tool tips.

Screen Level Help

To select screen level help, click “Help” on the “Menu” bar, and then select “Screen Help”. Help for the screen is then displayed.

Field Level Help

To select field level help, right click on the field, and then click “Help” from the pop-up. Help for the selected field is then displayed. You may also press the F1 key to get field help.

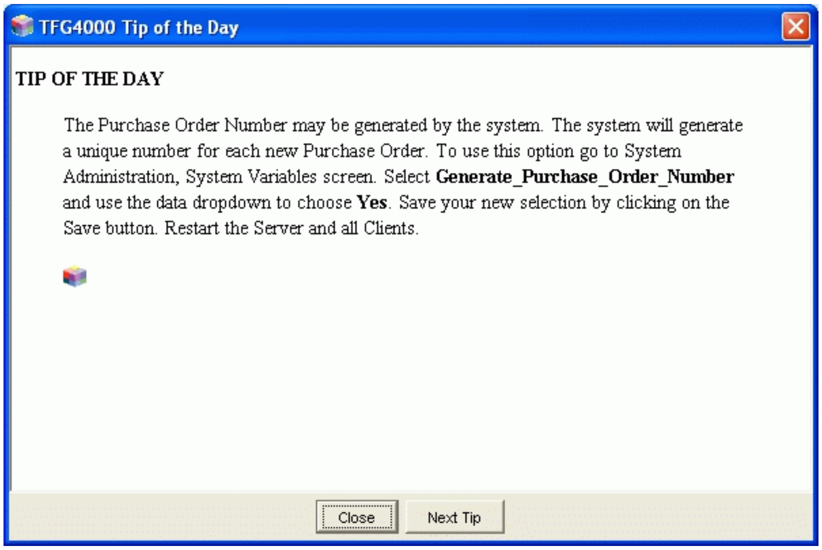
Column Level Help

To select column level help, right click on the column heading, and then click “Help” from the pop-up. Help for the selected column is then displayed.

Tip of the Day

Each time you start TFG4000, there is a "Tip of the Day" pop-up displayed that describes some of the functionality that is available within the application. To close the "Tip of the Day" pop-up, click the "Close" button. To view another tip, click the "Next Tip" button. This feature can be turned off by clicking the box next to "Don't Show Tip of the Day at Startup" on the Welcome screen. A check mark will appear in the box indicating the "Tip of the Day" should not be displayed during start up. To reinstate the "Tip of the Day" feature, click the box and the check mark will disappear indicating the "Tip of the Day" should be displayed during start up.

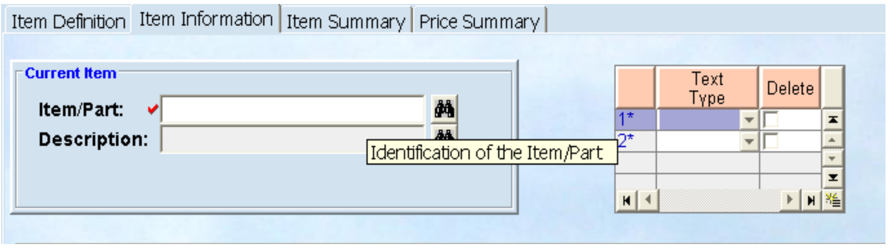
Example Only:



Tool Tips

Throughout TFG4000, there are embedded tool tips that help describe certain areas on the screen. You simply roll your mouse (cursor) over the area in question, and a pop-up will describe that specific area. The tool tip pop-up will remain visible for a few seconds, then it will disappear automatically.

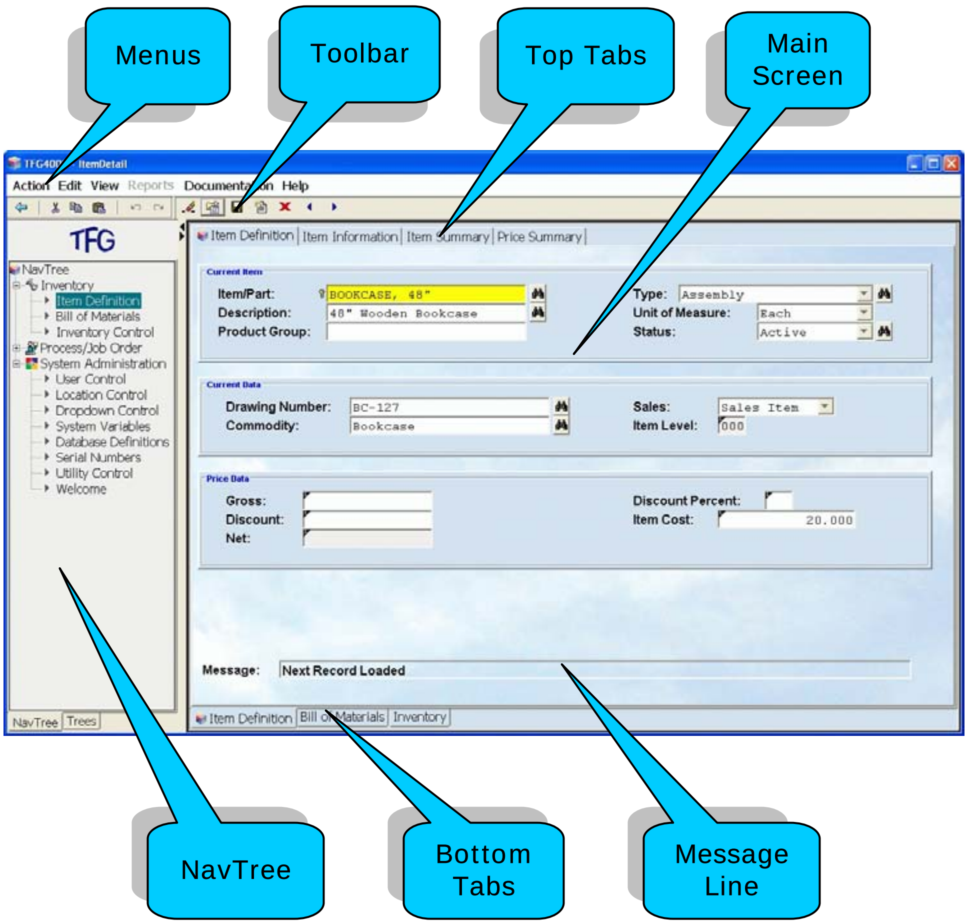
Example Only:



Using TFG4000

You can navigate through the TFG4000 screens by using the “NavTree”, the “Goto Screen” section of the “View Menu”, and the tabs on the top and bottom of the screen. For easy use, the toolbar provides a variety of functions for you to choose from as you use the TFG4000 applications. There are buttons located on the toolbar that allow you to perform various functions from each screen, such as opening/displaying data, saving data, etc. The “Menu” provides useful functions as well, such as printing reports, documentation, help, etc.

Sample Screen



Menus

Each screen in TFG4000 has various menus available for working with your data. The following describes the purpose of each menu and special features.

Action

This menu is for printing screens and for exiting TFG4000. It contains the following menu items:

Print	Prints the entire screen in either portrait or landscape mode.
Print Text	Prints only the text currently displayed on the screen in either portrait or landscape mode.
Exit	Terminates the TFG4000 session.

Edit

This menu is for performing cut, copy, and paste operations on data. It contains the following menu items:

Cut	When you highlight data and use this function, the data is removed from the screen and is available in a clipboard for pasting. Holding the “Ctrl” key and pressing the “X” key will perform the same operation.
Copy	When you highlight data and use this function, the data is copied into a clipboard and is available for pasting. Holding the “Ctrl” key and pressing the “C” key will perform the same operation.
Paste	When you position your cursor in a field and use this function, data you have previously put into the clipboard using the “Cut” or “Copy” operation will be pasted after your cursor. Holding the “Ctrl” key and pressing the “V” key will perform the same operation.

Note: If your keyboard is in “insert mode” the data will not overlay data that follows, but if it is not in “insert mode” it will. Press the Insert key on your keyboard to change your insert mode to whichever way you prefer.

View

This menu allows you to change the way the TFG4000 screens are presented and how you navigate the screens. It contains the following menu items:

Set Font Size — You can choose a font size from 10 to 18. With larger font sizes you may have to scroll to see the entire screen.

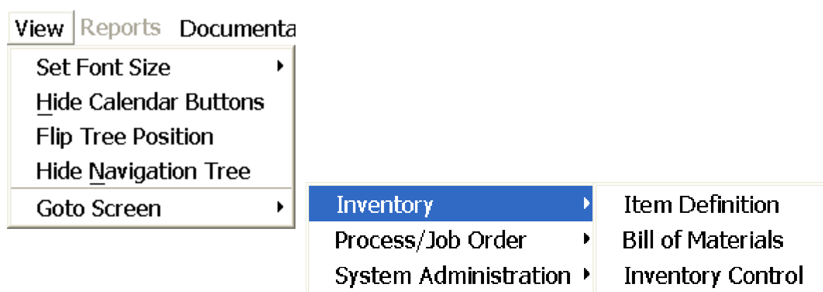
Hide Calendar Buttons — Toggles whether or not a Calendar button is displayed next to the date fields.

Flip Tree Position — Changes the position of the "NavTree" to either the left or the right side of the screen.

Hide Navigation Tree — Hides the "NavTree" from the screen. Click it a second time to display the "NavTree" on the screen.

Note: The dark arrows in the bar between the NavTree" and the main screen perform the same function.

GoTo Screen — Displays the "NavTree" in menu format. You can use this method to navigate the screens at any time but it is particularly useful if you hide the "NavTree".



Reports

This menu is only available if there are reports available for the screen you are on. There will be various menu items depending on the screen.

Documentation

This menu lets you select the TFG4000 manuals for viewing and printing.

Help

This menu provides help about the screen you are on and information about TFG4000. It contains the following menu items:

Screen Help — Displays information about the screen you are on.

About — Displays information about TFG4000.

Buttons & Icons

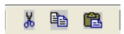
Each screen in TFG4000 has various buttons available for working with your data. The following describes the purpose of each button and special features. It also explains other icons you may see on the screens.

Toolbar Buttons 

Use the following buttons to perform TFG4000 application tasks. The buttons displayed change with the screen you are working with.

Previous screens 

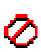
Use this button to return to your previous screen. You can go back up to ten screens.

Cutting, copying and pasting text 

You can use “Cut” and “Paste” to move selected text. You can use “Copy” and “Paste” to copy selected text and paste the copy in another place. “Cut”, “Copy”, and “Paste” can also be selected from the “Edit” menu.

Working with data

You can erase, open, save, add, delete, get previous or next, copy, print, and refresh data by using these buttons:

 Erase	This button clears data from the screen. It does not update any data; it merely clears the data away to make it easier for you to enter something else. It is particularly useful for resetting summary screens for a new search and it may be required when adding new entries on some screens.
 Open (Display)	This button retrieves data that has been previously saved for viewing and/or modifying. The **Enter** key executes this button by default.
 Save	This button stores new data and modified data. If you enter new data or change existing data and do not click this button, the system prompts you to do so.
 Cancel	This button reduces any remaining quantities to zero and changes statuses to “Cancelled”.
 Delete	This button deletes previously saved data. On screens indicated as “definition” screens, the delete button deletes related data in addition to the data currently displayed. On all other screens only the data displayed is deleted.
 Previous	This button retrieves data that alphabetically precedes the currently displayed data.

Next	This button retrieves data that alphabetically follows the currently displayed data.
Copy	This button copies data from one place to another. On screens indicated as “definition” screens, it copies related data in addition to the data currently displayed. On all other screens, only the data displayed is copied.
Print	This button sends your document to the printer to be printed.
Build	This button extracts eligible data from one place to create a new definition in another place. For example, it can extract customer order data to build a new invoice.
Refresh	This button rebuilds the data on the screen.

Screen Buttons

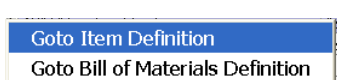
Throughout the screens are buttons that perform functions.

Search	This button is for finding data you have already entered. When you click this button a search box pops up.
Calendar	This button provides a pop-up calendar for selecting dates. You can choose the month and the year, and then double-click on the date you desire. Click “Today” to re-position the calendar on the current date. Click “Cancel” if you decide not to select a date. Dates can be entered without using the “Calendar” button if desired. Manually entered dates are verified so a pop-up appears prompting you to correct a date if it is invalid.
Dropdown	This button provides a “dropdown” list of pre-defined values from various fields that have this button next to it. If you click on one of the values from the dropdown list, that value will appear in the adjacent field.

Table Buttons

Throughout the tables are buttons that perform functions.

GoTo/Selection	This button is for either transferring to another screen or selecting data. When you right-click on this button, it displays a menu of related screens and/or a menu of selection activities. To transfer to another screen, click on the screen you desire and that screen is displayed with the appropriate keys already filled in. To select data, such as a component or inventory location, click the action you want.



Properties	This button is located at the lower left corner of each table. It allows you to edit the layout of the table. You can use this button to hide or display columns in the table and to restore the original table layout.
Add Rows	This button appears in the lower right corner of modifiable tables so that you can put more empty rows on the screen for adding data to the table. If you are trying to enter another row in a table and there are not any blank rows to use, click the “Add Rows” button.
Scroll to the Left	This button allows you to scroll to the left of the table.
Scroll to the Right	This button allows you to scroll to the right of the table.
Scroll Up	This button allows you to scroll up the table.
Scroll Down	This button allows you to scroll down the table.
Scroll Bottom	This button allows you to scroll to the very bottom of the table.
Scroll Top	This button allows you to scroll to the very top of the table.
Scroll Left	This button allows you to scroll to the very left of the table.
Scroll Right	This button allows you to scroll to the very right of the table.

Information Icons

Icons on the screen show properties about the field.

Numeric	This icon in the upper left corner of a field indicates that the field is for a numeric value. You are able to enter only numbers, commas, and decimals in fields containing this icon.
Key	This icon to the left of a field indicates that the field is a key field and is required for this screen.
Required	If you try to display or save data without entering a required field, this checkmark icon is displayed next to the missing field.

Field Colors

The fields on the screens and in screen tables have three different colors that have functional significance.

Gray A gray field is display only, no entry allowed or necessary

White A white field is open for entering data

Yellow A yellow field indicates where the cursor is currently positioned

Changing Screen Table Properties

Tables that appear on screens can be modified. The columns can be re-sized, re-positioned, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.

Note: Re-sizing and re-positioning remain in effect for the duration of the current session. The default sizing and positioning is restored when TFG4000 is restarted.

To hide or unhide a column click the Properties button located in the lower left corner of the table. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the table. There may be multiple tabs for the table, so you must click on the tab that contains the column(s) you want. To save the changes you have made, click the “OK” button. To discard the changes you have made, click the “Cancel” button. To reset the properties back to the default properties, click the “Restore Default Visibility” button. Another pop-up will appear asking the range you wish to restore. Use the dropdown provided to select either “All Tabs”, which will restore the defaults for the entire table, or “Currently Displayed Tab Only”, which will restore the default properties only for the portion of the table indicated by the tab you are viewing. Once you have made your selection click “OK” or “Cancel”. That pop-up will disappear and the column visibility properties are reset as requested or the reset action is cancelled. Then you may click either “OK” or “Cancel” to save or discard the property changes.

Note: Property changes remain in effect even after TFG4000 is restarted.

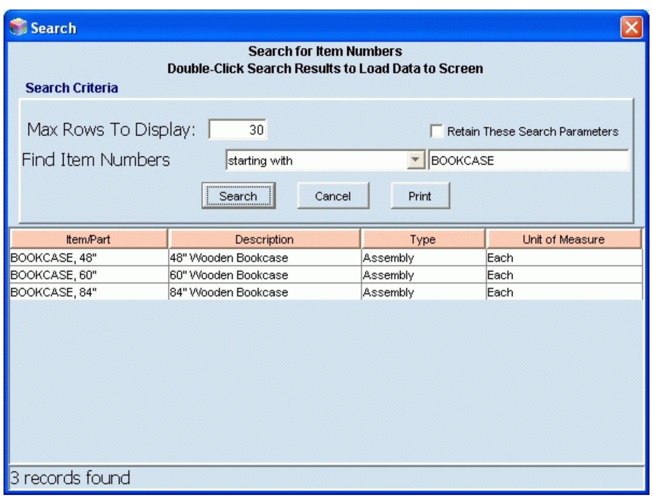
Performing Searches

There are two types of searches in TFG4000 that are similar in appearance, however they have different functionality. The first is a “Search” associated with a field on the screen. The second is a “Search Pop-up” which is found on tables. One of the differences between the two is that a “Search Pop-up” can load multiple table rows to the screen at one time but a “Search” will not. Another difference is that “Search” screen results can be printed but “Search Pop-up” results cannot.

Search Screen (Fields)

Below is an example of a search screen that may be used to locate information already entered into the system, and/or to automatically populate the fields on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the “Search” button is pressed and when you exit the search. In addition, you also have the option to retain search parameters by checking the box located next to “Retain Search Parameters”. This option allows you to save the search parameters you used for future searches.

Example Only:



Using the Search Screen

1. Click the Search button located directly next to the field you want to search.

2. Enter the maximum number of rows of data you want to display in your results. The default is “30”.

3. Select one of the search choices using the dropdown. The default is “starting with”.

4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database. If there is a value in the screen field you are searching on, it will be copied to the search field. You can change the search field value on the “Search” screen.

5. Click the Search button .

6. Double click on the row you desire to load the information to the main screen.

Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.

3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

Printing the Search Results

To print the search results, use these steps:

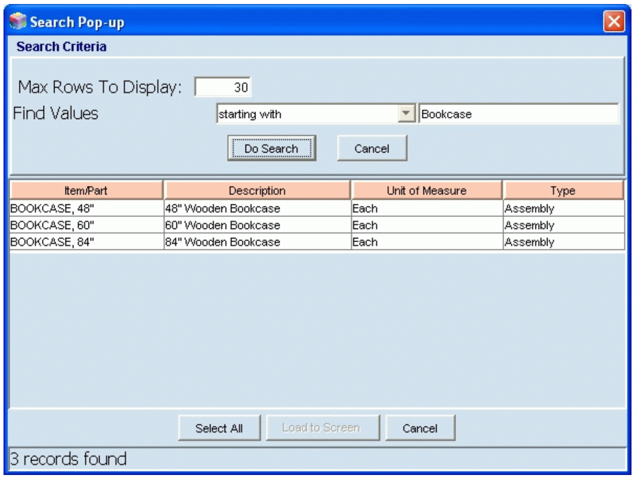
1. Click the Print button on the “Search” screen.

2. Type or select the appropriate formatting options in the dialog box and then click “OK” to print the report.

Search Pop-Up Screen (Tables)

Below is an example of a search pop-up screen that may be used to populate columns in the table on the screen that you are currently viewing or editing. When search results are displayed you can move the columns into different places on the search pop-up screen so that the values can be viewed in positions different from the default layout. Click the heading of the column you wish to move then drag and drop it into the desired position. Resize columns by moving the cursor over the heading until you see an arrow with two heads. Click, and with the mouse button still down, move the cursor right or left until the column is the desired width. The default layout is restored when the “Do Search” button is pressed and when you exit the search pop-up.

Example Only:



Using the Search Pop-Up Screen

1. **Right** Click the GoTo/Selection button in the row you want to search.

2. Enter the maximum number of rows of data you want to display in your results. The default is “30”.

3. Select one of the search choices using the dropdown. The default is “starting with”.

4. Enter all or part of the value you want to search with. You may leave the search field blank to return all applicable records in the database.

5. Click the “Do Search” button.

6. To select just one entry, double-click on it to populate the fields on your screen.

7. To select more than one entry, hold down the “Control” key while you click on the other selections with your mouse, then click “Load to Screen” to populate the information.

8. To load all of the entries to the screen table, click the “Select All” button and then click the “Load to Screen” button.

Modifying the View of the Search Results

To modify the view of the search results, do the following:

1. To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

2. To re-position a column click on the column heading, then still holding the mouse down, move the column to the where you want it and release the mouse. Some columns are key columns and will not remain where you re-position them.

3. To re-size the window move your cursor over the edges of the window until you see an arrow with two heads. Click, and then still holding the mouse button down, move the cursor to increase or decrease the size of the window.

Printing the Search Results

To print the search results, use these steps:

1. Click the Print button on the “Search” screen.

2. Type or select the appropriate formatting options in the dialog box and then click “OK” to print the report.

Working with Reports

You can view, modify, and print reports by using the “Reports” menu located just above the toolbar. If “Reports” is faded gray, then there are no reports available for that screen.

To view a report, follow these steps:

1. Click on “Reports” above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.

2. A status window will appear showing that the system is generating the report.

3. You will then see your report displayed on the screen.

To modify and/or print a report, follow these steps:

1. Click on “Reports” above the toolbar. A menu will drop down indicating which reports can be generated from that screen. Click on the report name that you want.

2. A status window will appear showing that the system is generating the report.

3. You will then see your report displayed on the screen with this toolbar at the top:

Printing Options	Allows you to set the Page Number Prefix, number of pages wide, and the Repeat Section Header/Footer settings. Adjust the settings to your specifications and then click “OK”.
Page Setup	Allows you to adjust page settings. Once finished adjusting the settings, click “OK”.
Print	Allows you to select printer settings and print your report. Once finished with settings, click “OK” to print the report.
Preview	Allows you to preview your report layout before you actually print. Once finished previewing, click “Close”.
Excel	Allows you to save your report as an Excel document. Once finished naming and specifying where to save your report, click “Save”.
Revert	Allows you to discard all layout changes and revert to default settings. Simply click either “Yes”, or “No”.
Help	Shows the Report Layout Instruction screen.

In some reports the selection criteria can be changed in the report window. Adjust the selection criteria as desired, and then click the “Refresh” button to reload the data. When you exit the report you will be asked if you want to update the screen with the refreshed data from the report. Click “Yes” to update the screen or “No” to leave the screen as it was when you started the report.

Report layouts can be modified. The columns can be re-sized, hidden, and un-hidden.

To re-size a column move your cursor over the column heading you want to re-size and move to the right until you see an arrow with two heads. Click, then still holding the mouse button down, move the cursor to the right until the column is as wide as you want or to the left until the column is as small as you want.

To hide or unhide a column right click in the report area, then select the “Column Visibility” tab. A red check mark next to the column name indicates the column will be displayed. If there is not red check mark next to the column name it will not be displayed in the report. To save the changes you have made, click the “OK” button. To discard the changes you have made, click the “Cancel” button. To reset the properties back to the default properties, click the “Revert” button located on the report toolbar. A dialog box will appear asking if you want to discard changes and revert back to default settings. Click either “Yes” to restore the defaults or “No” to keep the changes.

Note: Report layout changes remain in effect even after TFG4000 is restarted.

Working with Summary Screens and Summary Reports

TFG4000 has many summary screens and reports available for locating data, listing data, and summarizing data. Each summary screen and report has various fields for search criteria that are used in combination with one another. The search criteria fields can use wildcards and other sophisticated SQL search techniques. For more information about wildcard characters that can be used for advanced searching, refer to the following Microsoft website:

http://msdn.microsoft.com/library/default.asp?url=/library/en-us/off2000/html/acconWildcardCharactersS.asp

Due to differences between Access and ANSI wildcard characters, when reading this website and using wildcards in TFG4000, substitute as follows:

% for *****
_ for **?**
is not used

Also note that these wildcards cannot be used in searches.

Calendar

What is the Calendar for?

The calendar screen is used to indicate which dates are non-working days so scheduling processes won't select a non-working date.

Calendar Screens

There is only one calendar screen.

Calendar

This screen allows you to indicate which dates are non-working days. There is a dropdown provided so you can show what type of non-working day it is: Weekend, Holiday, Vacation, Off Day.

Calendar Screen Explained

Calendar Screen

This screen allows you to indicate which dates are non-working days.

Calendar Table

Column	Explanation
Date	A date selected to be a non-working day.
Day	The day of the week of the non-working day.
Type	Type of non-working day: **Weekend** **Holiday** **Vacation** **Off Day**
Delete	This is a checkbox to indicate you want to delete a calendar entry.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen.

Accessing the Calendar Screen

1. Click the plus ("+") next to "Common Applications" or double-click "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Calendar". The Calendar screen is displayed.

Using the Calendar Screen

Use these procedures to erase the screen, display, and delete calendar entries.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying the Calendar

To display the calendar, perform the following steps:

1. Click the Open (Display) button located on the toolbar or hit the Enter key.

2. The calendar is displayed on the main screen.

Deleting a Calendar Entry

To delete an entry from the calendar, perform the following steps:

1. Display the calendar. See "Displaying the Calendar" above.

2. Click the checkbox in the "Delete" column of the Calendar table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. Once finished, click the Save button located on the toolbar.

Note: Once a calendar entry is deleted, it can no longer be displayed or updated.

Calendar Reports

The Calendar screen has the following report available:

Calendar Report
Basically the same information displayed on the Calendar screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

Employee

What is an Employee?

An employee is any person employed by your company for whom information must be stored.

Employee Screens

“Employee” consists of five tabbed screens that are used to enter and maintain employee data. Each screen is used for specific purposes to aid in the entry and maintenance of employee information.

Employee

The employee screen allows you to define an employee with basic information about the employee such as the type of employee, status, address, etc.

Contact

The employee contact screen allows you to enter an employee contact and if necessary, multiple contacts for an employee who has more than one contact. You can enter as many contacts as you need for an employee.

Information

This screen allows you to enter text you wish to maintain concerning an employee. For example, you could enter text information for an employee that describes specific details about performance for this employee. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL’s for web sites.

Skills

This screen allows you to define the skills this employee possesses and the pay rate used when the employee is assigned a task requiring a particular skill.

Schedule

This screen allows you to designate how many shifts per day of the week and how many hours for each shift an employee may work.

Employee Screens Explained

Employee Screen

This screen is for defining an employee with basic information about the employee.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration". Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee defined here.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Employee Data

Field	**Explanation**
Line 1	First line of the address for this employee.
Line 2	Second line of the address for this employee.
Line 3	Third line of the address for this employee.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
Phone	Telephone number, including area code, for this employee.
Extension	Extension number for the employee.
Fax	Fax telephone number, including area code, for this employee.

URL Address	URL (Universal Resource Locator) or Website address for this carrier.
E-Mail	E-Mail address for this employee.
Hire Date	Date this employee was hired.
Term Date	Date the employee terminated employment.
Work Center	Work Center where this employee is assigned.
Default Rate	The basic pay rate for the employee.
Rate Unit	Unit of measure for the Default Rate (Hours).
Overtime Rate	Pay rate for the employee when working overtime.
Rate Unit	Unit of measure for the Overtime Rate (Hours)
Rate Factor	Multiplication factor applied to the Default Rate to determine the Overtime Rate (can be used instead of a specific Overtime Rate)
Holiday Rate	Pay rate for the employee when working on a holiday.
Rate Unit	Unit of measure for the Holiday Rate (Hours)
Rate Factor	Multiplication factor applied to the Default Rate to determine the Holiday Rate (can be used instead of a specific Holiday Rate)

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Employee Screen

1. Click the plus ("+") next to "Common Applications" or double-click "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the data for that employee is displayed on the main screen.

Using the Employee Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next employee.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Existing Employee

To display an employee, perform the following steps:

1. Enter an employee number in the “Employee” field.

2. Click the Open (Display) button located on the toolbar or hit the Enter key.

3. The employee data is displayed on the main screen.

   -or-

1. Use the Search button next to the “Employee” field or the “Name” field, or the <u>second</u> Search button next to the “Work Center” field to select an employee number.

2. Double-click on the “Employee” you would like to display in the “Search” screen table.

3. The employee data is displayed on the main screen.

Adding a New Employee

To add an employee, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.

2. Enter an employee number in the “Employee Number” field. It can be any combination of numbers and letters.

3. Enter data in any of the other fields you desire, these fields are optional.

4. When done, click the Save button located on the toolbar.

   -or-

1. Display an existing employee. See “Displaying an Existing Employee” above.

2. Enter a new employee number in the “Employee Number” field and change any of the fields you desire.

3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy employee data to a new employee number; however, contacts, text, skills, and schedules are not copied with this procedure.

Updating an Existing Employee

To update an existing employee, perform the following steps:

1. Display the employee data you wish to change. See “Displaying an Existing Employee” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting an Existing Employee

To delete an existing employee, perform the following steps:

1. Display the employee data you wish to delete. See “Displaying an Existing Employee” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the employee click “No” on the “Confirm Action” pop up message.

Note: Once an employee is deleted, it can no longer be displayed or updated.

Displaying the Previous Employee

To display the employee that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous employee data is displayed on the main screen.

Displaying the Next Employee

To display the employee that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next employee data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Employee” field, then click the Next button .

Contact Screen

This screen is for entering and maintaining contacts for an employee. Multiple contacts can be defined and maintained.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", “Part Time” or “Contractor”.
Name	The full name of the employee.
Status	Specifies whether the employee is “Active” or “Inactive”.
Title	The employee’s title within this organization.
SSN	The employee’s social security number.

Contact Data

Field	**Explanation**
Contact Name	Name of the contact.
Sequence	Number used internally to keep track of contacts.
New Contact	Indicates if you are adding this person as a new contact.
Line 1	First line of the address for this contact.
Line 2	Second line of the address for this contact.
City	City for this address.
State	State associated with this address.
Zip	Postal Zip Code for this address.
Country	Country associated with this address.
Relationship	How this contact is related to the employee.
Phone	Telephone number, including area code, for this contact.
Extension	Telephone extension.
Fax	Fax telephone number, including area code, for this contact.
E-Mail	E-Mail address for this contact.

URL Address	URL (Universal Resource Locator) or Website address for this contact.

Message Line

Field	Explanation
Message	Displays information about the current status of the screen including error messages.

Accessing the Contact Screen

1. Click the plus ("+") next to "Common Applications" or double-click  "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Contact" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the first contact found for that employee is displayed on the main screen.

Using the Contact Screen

Use these procedures to display, add, update, delete, display the previous, and display the next employee contact.

Displaying an Existing Contact

To display employee contact information, perform the following steps:

1. Enter an employee number in the “Employee” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The first contact found for the employee is displayed on the main screen.
4. Click the Next button to view the next contact for this employee or the first contact for the next employee.

-or-

1. Use the Search button next to the “Employee” field, or the “Name” field to select an employee number.
2. Double-click on the employee you would like to display in the “Search” screen table.
3. The first contact found for the employee is displayed on the main screen.
4. Click the Next button to view the next contact for this employee or the first contact for the next employee.

Adding an employee Contact

To enter an employee contact, perform the following steps:

1. Enter or select the employee number you want.
2. Enter contact data in the fields provided.
3. Click the checkbox next to “New Contact” to indicate you are adding this person as a new contact.
4. Once finished, click the Save button located on the toolbar.

Updating Existing Contact Information

To update existing contact information, perform the following steps:

1. Display the employee address data you want to change. See “Displaying an Existing Contact” above.
2. Change the contact data as necessary.
3. Once finished, click the Save button located on the toolbar.

Deleting Existing Contact Information

To delete existing contact information, perform the following steps:

1. Display the employee contact you want to delete. See “Displaying an Existing Contact” above.
2. Click the Delete button located on the toolbar.
3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the contact click “No” on the “Confirm Action” pop up message.
4. The contact is deleted.

Note: Once contact information is deleted, it can no longer be displayed or updated.

Displaying the Previous Existing Contact

To display the contact data that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.
2. The previous contact is displayed on the main screen.

Displaying the Next Existing Contact

To display the contact data that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.
2. The next contact is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Employee” field, then click the Next button .

Information Screen

This screen allows you to enter text you wish to maintain concerning an employee. For example, you could enter text information for an employee about performance. You can also attach references to external documents, including electronic documents such as spreadsheets, drawings and word processor documents, references to physical documents such as books and maps, and references to URL's for web sites.

Current Employee

Field	Explanation
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Name	The full name of the employee.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".

Information Table

Column	Explanation
Row	The line number of the row in the table.
Info Type	A designation for the type of information stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".
Text Information	This is where you enter text information or view text that has already been entered.
Delete	This is a checkbox to indicate you want to delete a text record.

Reference Table

Column	Explanation
Row	The line number of the row in the table.
Reference Type	A designation for the type of reference stored. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen under "System Administration".

Reference	Directory and file name for an electronic reference, URL for a website, or description of where to find a physical reference. An electronic reference can be a spreadsheet, a word processor document, or a text file. A physical reference can be the name of a book with the page number.
Delete	This is a checkbox to indicate you want to delete a reference record.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Information Screen

1. Click the plus ("+") next to "Common Applications" or double-click  "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Information" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the information text types and reference information for that employee are displayed on the main screen.

Using the Information Screen

Use these procedures to display, add, update, delete, display the previous, and display the next employee information or references.

Displaying Existing Information and References

To display information or references, perform the following steps:

1. Enter an employee number in the “Employee” field and click the Open (Display) button located on the toolbar or hit the Enter key.

   -or-

   Use the Search button next to the “Employee” field, or the “Description” field to select an employee number and double-click on the “Employee” you would like to display in the “Search” screen table.

2. The information text types and references for the employee are displayed on the main screen.

3. To display information text, click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to display and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

4. The text will be displayed in a pop-up window.

5. The reference information is displayed in the Reference table. Use the scroll bar on the right to display more rows if necessary.

6. To view electronic references, right click on the reference you would like to display. Choose “Goto External Application” from the menu.

Adding Information

To enter information, perform the following steps:

1. Display the employee you want. See “Displaying Existing Information and References” above.

2. Click an empty row in the Information table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the text type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Information Text Type in the “Info Type” column of the Information table.

4. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

5. The text will be displayed in a pop-up window.

6. Enter the desired information in the pop-up window and click “Ok” when done.

7. Once finished, click the Save button located on the toolbar.

Note: You can add employee information and references at the same time.

Adding References

To enter references, perform the following steps:

1. Display the employee you want. See “Displaying Existing Information and References” above.

2. Click an empty row in the Reference table. If there are no empty rows click the Add Rows button in the lower right corner of the table.

3. Type the first letter of the reference type you want (type the letter multiple times if there is more than one type that begins with the same letter).

   -or-

   Using the dropdown list, select the Reference Type in the “Reference Type” column of the Reference table.

4. Enter the reference in the “Reference” column.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

5. Once finished, click the Save button located on the toolbar.

Note: You can add employee information and references at the same time.

Updating Existing Information

To update existing information, perform the following steps:

1. Display the employee data you want to change. See “Displaying Existing Information and References” above.

2. Click the Goto/Selection button in the “Text Information” column of the Text table for the row you want to update and select “Edit Information Text” on the menu that appears. Use the scroll bar on the right to display more rows if necessary.

3. The text will be displayed in a pop-up window.

4. Change the desired information in the pop-up window and click “Ok” when done.

5. Once finished, click the Save button located on the toolbar.

Note: You can update employee information and references at the same time.

Updating Existing References

To update existing references, perform the following steps:

1. Display the employee data you want to change. See “Displaying Existing Information and References” above.

2. Enter the new reference in the “Reference” column of the Reference table for the row or rows you wish to update.

   -or-

   For an electronic reference, right click the reference you want to update. Choose “Select External File”. A standard Windows file selection dialog is displayed. Locate the directory that contains the file you want. Select the file you want and click the “Open” button.

3. Once finished, click the Save button located on the toolbar.

Note: You can update employee information and references at the same time.

Deleting Existing Information and References

To delete existing information and references, perform the following steps:

1. Display the employee data that has the information text and/or reference you want to delete. See “Displaying Existing Information and References” above.

2. To delete text information, click the checkbox in the “Delete” column of the Information table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. To delete reference information, click the checkbox in the “Delete” column of the Reference table for the row you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

4. Once finished, click the Save button located on the toolbar.

Note: Once employee information and references are deleted, they can no longer be displayed or updated. Deleting a reference to an external file does not delete the actual file; it deletes only the reference to the file.

Displaying the Previous Existing Information and References

To display the information and references for the employee that precedes the employee currently displayed, perform the following steps:

1. Click the Previous button ◀ located on the toolbar.

2. The information and references for the previous employee are displayed on the main screen.

Displaying the Next Existing Information and References

To display the information and references for the employee that follows the employee currently displayed, perform the following steps:

1. Click the Next button ▶ located on the toolbar.

2. The information and references for the next employee are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the "Employee" field, then click the Next button ▶.

Skills Screen

This screen allows you to define the skills this employee possesses and the pay rate to be used when the employee is assigned a task requiring a particular skill.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Skills Table

Column	**Explanation**
Row	The line number of the row in the table.
Skill	Work ability or expertise this employee possesses.
Description	Short description of the skill.
Rate	Pay rate for this particular employee skill.
Skill Time Unit	The measure of time used for the skill (Hours).
Delete	This is a checkbox to indicate you want to delete a skill from the employee's skill list.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen.

Accessing the Skills Screen

1. Click the plus ("+") next to "Common Applications" or double-click  "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the information for that employee is displayed on the main screen.

4. Click the "Skills" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the skills list for that employee is displayed on the main screen.

Using the Skills Screen

Use the following procedures to erase the screen, display, update, add, delete, display the previous, or display the next employee skills list.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Existing Skills List

To display an employee's skills list, perform the following steps:

1. Enter an employee number in the "Employee" field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The skills list for the employee is displayed on the main screen.

-or-

1. Use the Search button next to the "Employee" field, or the "Description" field to select an employee number.
2. Double-click on the "Employee" you would like to display in the "Search" screen table.
3. The skills list for the employee is displayed on the main screen.

Updating and Adding Skills Data for an Employee

To edit existing skills data or add new skills data for an employee:

1. Display the employee you wish to change. See "Displaying an Existing Skills List" above.
2. Change the skills data as needed. You can use the Add Rows button located on the toolbar to add additional rows for entry.
3. When all of the appropriate columns are changed, click the Save button located on the toolbar.

Deleting Skills from an Employee

Perform the following steps to delete skills from an employee:

1. Display the employee you wish to change. See "Displaying an Existing Skills List" above.
2. Click the "Delete" checkbox next to the row(s) you want to delete. You may select more then one row to be deleted at one time. Click the checkbox again to remove the deletion flag.

3. When all of the appropriate rows are selected, click the Save button located on the toolbar.

Displaying the Previous Skills List

To display the skills list that precedes the skills list currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous skills list is displayed on the main screen.

Displaying the Next Skills List

To display the skills list that follows the skills list currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next skills list and its operations are displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button , then click the Next button .

Schedule Screen

This screen allows you to designate how many shifts per day of the week and how many hours for each shift an employee may work.

Current Employee

Field	**Explanation**
Employee	A unique identifier assigned to each employee. It is the main key for all other employee data.
Type	The classification of the employee. Some examples of types are: "Full Time", "Part Time" or "Contractor".
Name	The full name of the employee.
Status	Specifies whether the employee is "Active" or "Inactive".
Title	The employee's title within this organization.
SSN	The employee's social security number.

Shift Schedules

Field	**Explanation**
Monday Shifts	The number of shifts this employee works on Mondays.
Hours Per Shift	The number of hours per shift this employee works on Mondays.
Tuesday Shifts	The number of shifts this employee works on Tuesdays.
Hours Per Shift	The number of hours per shift this employee works on Tuesdays.
Wednesday Shifts	The number of shifts this employee works on Wednesdays.
Hours Per Shift	The number of hours per shift this employee works on Wednesdays.
Thursday Shifts	The number of shifts this employee works on Thursdays.
Hours Per Shift	The number of hours per shift this employee works on Thursdays.
Friday Shifts	The number of shifts this employee works on Fridays.
Hours Per Shift	The number of hours per shift this employee works on Fridays.
Saturday Shifts	The number of shifts this employee works on Saturdays.

Hours Per Shift	The number of hours per shift this employee works on Saturdays.
Sunday Shifts	The number of shifts this employee works on Sundays.
Hours Per Shift	The number of hours per shift this employee works on Sundays.
Total Shifts	The total number of shifts this employee works in a week.
Total Hours	The total number of hours this employee works in a week.

Message Line

Field	**Explanation**
Message	Displays information about the current status of the screen including error messages.

Accessing the Employee Screen

1. Click the plus ("+") next to "Common Applications" or double-click "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Employee". The Employee screen is displayed.

3. If there is an employee number in the "Employee" field, the data for that employee is displayed on the main screen.

4. Click the "Schedule" tab at the top of the main screen.

5. If there is an employee number in the "Employee" field, the schedule for that employee is displayed on the main screen.

Using the Schedule Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next employee schedule.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Existing Employee Schedule

To display an employee schedule, perform the following steps:

1. Enter an employee number in the “Employee” field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The employee schedule data is displayed on the main screen.

-or-

1. Use the Search button next to the “Employee” field, the “Name” field, the “Employee Code” field, the “Type” field, or the “Status” field to select an employee number.
2. Double-click on the “Employee” you would like to display in the “Search” screen table.
3. The employee schedule data is displayed on the main screen.

Adding a New Employee Schedule

To add an employee schedule, perform the following steps:

1. Display the employee you wish to change. See “Displaying an Existing Employee Schedule” above.
2. Enter data in any of the other fields you desire.

3 When done, click the Save button located on the toolbar.

-or-

1. Display an existing employee schedule see “Displaying an Existing Employee Schedule” above.
2. Enter another employee number in the “Employee Number” field and change any of the fields you desire.
3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy employee schedule data to another employee.

Updating an Existing Employee Schedule

To update an existing employee schedule, perform the following steps:

1. Display the employee schedule data you wish to change. See “Displaying an Existing Employee Schedule” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting an Existing Employee Schedule

To delete an existing employee schedule, perform the following steps:

1. Display the employee schedule you wish to delete. See “Displaying an Existing Employee Schedule” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the employee click “No” on the “Confirm Action” pop up message.

Note: Once an employee schedule is deleted, it can no longer be displayed or updated.

Displaying the Previous Employee Schedule

To display the employee schedule that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous employee schedule is displayed on the main screen.

Displaying the Next Employee

To display the employee schedule that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next employee schedule is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Employee” field, then click the Next button .

Location Control

What is a Location?

A location is a place where inventory is stored. It can be a physical location such as a stockroom or row/bin/aisle designation or it can be a logical location such as Stock1-Vendor1, Stock1-Vendor2, where the physical location is logically separated.

Location Screens

Location Control consists of three tabbed screens that are used to enter and maintain location data.

Location Definition

The location definition screen allows you to define a location with basic information about the location such as the type of location, status, etc.

Location Summary

The location summary screen allows you to list locations based on selection criteria entered.

Location Generation

The location generation screen allows you to specify various parameters then generate multiple location definitions based on those parameters.

Location Definition Screen

The location definition screen allows you to enter and display inventory location definitions.

Current Location

Field	**Explanation**
Location	Field for entering all or part of a location name to select the locations to be displayed in the Location table. Leave this field blank to select all locations.
Type	Information indicating the type of “Location”. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Description	Brief description of the location.
Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.

Location Data

Field	**Explanation**
Warehouse	The physical or logical warehouse where this location is located.
Zone	Area within the warehouse where this location is located or defined to be a part of.
City	The “City” is additional, optional information about the location. If a “City” is not entered when the Location is created it will be blank.
State	The “State” is additional, optional information about the location. If a “State” is not entered when the Location is created it will be blank.
Zip	The “Zip” is additional, optional information about the location. If a “Zip” is not entered when the Location is created it will be blank.
Usage	Defines how this location is to be used. A dropdown is provided with these values: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, “Shipping”.
Environment	Indicates any special environmental considerations for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.

Constraint	Indicates any special constraints for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Max Pallets	The maximum number of standard size pallets that can be stored in this location.
MSP	Indicates if this location is to be used for planning purposes in Material Scheduling (not used unless TFG4000 Material Scheduling is installed)

Message Line

Message	Displays information about the current status of the screen.

Accessing the Location Definition Screen

1. Click the plus (“+”) next to “Common Applications” or double-click  “Common Applications” in the “NavTree”.

   -or-

   Click on the “View” menu. Select “Goto Screen”, then select “Common Applications”.

2. Click “Location Definition”. The Location Definition screen is displayed.

3. If there is a location in the “Location” field, the data for that location is displayed on the main screen.

Using the Location Definition Screen

Use these procedures to erase the screen, display, add, update, delete, display the previous, and display the next location.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Displaying an Existing Location

To display a Location, perform the following steps:

1. Enter a location in the "Location" field.
2. Click the Open (Display) button located on the toolbar or hit the Enter key.
3. The location data is displayed on the main screen.

-or-

1. Use one of the Search buttons provided next to various fields on the screen to select a location.
2. Double-click on the "Location" you would like to display in the "Search" screen table.
3. The location data is displayed on the main screen.

Adding a New Location

To add a location, perform the following steps:

1. Click the Erase button located on the toolbar to clear the screen.
2. Enter a location in the "Location" field. It can be any combination of numbers and letters.
3. Enter data in any of the other fields you desire, these fields are optional.
4. When done, click the Save button located on the toolbar.

-or-

1. Display an existing location. See "Displaying an Existing Location" above.
2. Enter a new location in the "Location" field and change any of the fields you desire.
3. When done, click the Save button located on the toolbar.

Tip: The second procedure above can be used to copy location data to a new location.

Updating an Existing Location

To update an existing location, perform the following steps:

1. Display the location data you wish to change. See “Displaying an Existing Location” above.

2. Change the desired information on the screen.

3. When done, click the Save button located on the toolbar.

Deleting an Existing Location

To delete an existing location, perform the following steps:

1. Display the location data you wish to delete. See “Displaying an Existing Location” above.

2. Click the Delete button located on the toolbar.

3. Click the “Yes” button on the “Confirm Action” pop up message. If you do not want to delete the location click “No” on the “Confirm Action” pop up message.

Note: Once a location is deleted, it can no longer be displayed or updated.

Displaying the Previous Location

To display the location that precedes the one currently displayed, perform the following steps:

1. Click the Previous button located on the toolbar.

2. The previous location data is displayed on the main screen.

Displaying the Next Location

To display the location that follows the one currently displayed, perform the following steps:

1. Click the Next button located on the toolbar.

2. The next location data is displayed on the main screen.

Tip: You can use the Next button as a convenient way to locate the first record in the database. Start by erasing the screen using the Erase button or blanking out the “Location” field, then click the Next button .

Location Summary Screen

The location summary screen allows you to display a list of inventory location definitions based on selection criteria entered.

Selection Criteria Group

Field	Explanation
Location	Field for entering all or part of a location name to select the locations to be displayed in the Location table. Leave this field blank to select all locations.
Type	This field is for selecting what types of locations are to be displayed in the Location table. Leave this field blank to select all types of locations.
Usage	Field for selecting locations based on usage. Leave this field blank to select locations with all type of usage.
Status	Field for selecting locations based on status. Leave this field blank to select locations with any status.
Warehouse	Field for selecting locations based on the warehouse they are in. Leave this field blank to select locations in any warehouse.
Zone	Field for selecting locations based on the zone they are in. Leave this field blank to select locations in any zone.
Number of Rows to Display	Controls the number of database rows to retrieve during the query. The default value is 30. The more rows retrieved, the longer it takes the query to complete. Use the selection criteria to help control the number of rows retrieved.

Location Table (Location tab)

Column	Explanation
Row	The line number of the row in the table.
Location	Identification of the place where inventory may be stored.
Type	Information indicating the type of “Location”. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Location Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.
Usage	Defines how this location is to be used. Some examples of usage type are: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, and “Shipping”.

Constraint	Indicates any special constraints for this location. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Environment	Indicates any special environmental considerations for this location. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.
Maximum Pallets	The maximum number of pallets that can be stored in this location.

Location Table (Address tab)

Column	Explanation
Row	The line number of the row in the table.
Location	Identification of the place where inventory may be stored.
Location City	City where the location is located.
Location State	State where the location is located.
Location Zip	Zip code where the location is located.
MSP	Indicates if this location is to be used for planning purposes in Material Scheduling (not used unless TFG4000 Material Scheduling is installed)

Location Table (Description tab)

Column	Explanation
Row	The line number of the row in the table.
Location	Identification of the place where inventory may be stored.
Location Description	Brief description of the location.
Warehouse	The physical or logical warehouse where this location is located.
Zone	Area within the warehouse where this location is located or defined to be a part of.

Message Line

Message	Displays information about the current status of the screen.

Accessing the Location Summary Screen

1. Click the plus ("+") next to "Common Applications" or double-click "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Location Control". The Location screen is displayed.

3. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

4. Click "Location Summary". The Location Summary screen is displayed.

5. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

Using the Location Summary Screen

Use the following procedures to display an inventory location summary list.

Displaying Inventory Locations

Perform the following steps to display inventory locations:

1. Enter all or part of a location name in the "Location" selection criteria field, and/or select a type in the "Type" selection criteria field from the dropdown, and/or select a usage type in the "Usage" selection criteria field from the dropdown, and/or select a status in the "Status" selection criteria field from the dropdown, and/or enter all or part of a warehouse in the "Warehouse" selection criteria field, and/or
   enter all or part of a zone in the "Zone" selection criteria field.

2. Click the Open (Display) button located on the toolbar.

Location Summary Reports

The Location Summary screen has the following report available:

Location Summary Report
Basically the same information displayed on the Location Summary screen.

For more information about viewing, modifying, and printing reports, see "Working with Reports" in the "Using TFG4000" section of this manual.

Location Generation Screen

The location control screen allows you to enter various parameters then generate location definitions using those parameters. The parameters are divided into five sections which contain six characters each.

The starting location parameters are used to determine the first location to be generated and the ending location parameters are used to determine the last location generated.

Combinations of the parameters are used to determine the location names that will be generated. The generator examines the parameters entered and attempts to increment numeric values in the parameters based on the start and end patterns to generate the new location names.

When the parameters are entered and generation is requested, the system will verify the parameters entered to determine if locations can be generated from the information entered, and if so, how many locations would be generated. If there is an error in any of the parameters, you will receive a message explaining the problem. If the parameters are good, you will receive a message explaining how many locations will be generated and you will have the option of continuing with the generation or canceling the generation process. Click "Yes" to continue the process, "No" to cancel the process.

Only the Starting Location (First) parameter and Ending Location (First) parameter are required.

Generation Parameters

Field	**Explanation**
Starting Location (First)	Field for entering the first part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (First).
Starting Location (Second)	Field for entering the second part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Second).
Starting Location (Third)	Field for entering the third part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Third).
Starting Location (Fourth)	Field for entering the fourth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Fourth).
Starting Location (Fifth)	Field for entering the fifth part of the location to be used when locations are generated. Up to six characters may be entered

	here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Ending Location (Fifth).
Ending Location (First)	Field for entering the first part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (First).
Ending Location (Second)	Field for entering the second part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Second).
Ending Location (Third)	Field for entering the third part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Third).
Ending Location (Fourth)	Field for entering the fourth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Fourth).
Ending Location (Fifth)	Field for entering the fifth part of the location to be used when locations are generated. Up to six characters may be entered here with any combination of letters and numbers. The pattern used here must be consistent with the pattern used in Starting Location (Fifth).

Generation Data

Field	**Explanation**
Description	Brief description of the location.
Warehouse	The physical or logical warehouse where this location is located.
Zone	Area within the warehouse where this location is located or defined to be a part of.
City	The “City” is additional, optional information about the location. If a “City” is not entered when the Location is created it will be blank.
State	The “State” is additional, optional information about the location. If a “State” is not entered when the Location is created it will be blank.

Zip	The “Zip” is additional, optional information about the location. If a “Zip” is not entered when the Location is created it will be blank.
Type	Information indicating the type of “Location”. Some examples of Location Types include: WIP Stores, Inventory, Finished, Warehouse and Tool Crib.
Status	Information indicating the status of the Location: “Active”, “Inactive”, “Hold”, or “Quarantine”.
Environment	Indicates any special environmental considerations for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Environments include: “Refrigerated”, “Heated”, and “Clean Room”.
Usage	Defines how this location is to be used. A dropdown is provided with these values: “Pallet”, “Bulk”, “Replenish”, “Packing”, “Receiving”, “Staging”, “Shipping”.
Constraint	Indicates any special constraints for this location. A dropdown list of values is provided for your convenience. You can use those values or define your own using the "Dropdown Control" screen. Some examples of Constraints include: “Lift Truck” and “High Lift”.
Max Pallets	The maximum number of standard size pallets that can be stored in this location.
MSP	Indicates if this location is to be used for planning purposes in Material Scheduling (not used unless TFG4000 Material Scheduling is installed)

Message Line

Message	Displays information about the current status of the screen.

Accessing the Location Generation Screen

1. Click the plus ("+") next to "Common Applications" or double-click "Common Applications" in the "NavTree".

   -or-

   Click on the "View" menu. Select "Goto Screen", then select "Common Applications".

2. Click "Location Control". The Location screen is displayed.

3. If there is a location in the "Location" field, the data for that location is displayed on the main screen.

4. Click "Location Generation". The Location Generation screen is displayed.

Using the Location Generation Screen

Use these procedures to erase the screen and generate new location definitions.

Erasing the Screen

To erase the data from the screen click the Erase button located on the toolbar.

Note: Erasing the screen does not cause any data to be lost; it is merely a way to clean the screen in preparation for another operation.

Generating New Location Definitions

To generate new location definitions, perform the following steps:

1. Enter the first part of the starting location in the “Starting Location” “First” field.

2. Enter the first part of the ending location in the “Ending Location” “First” field. Make sure that the pattern entered here is consistent with the pattern entered in the “Starting Location” “First” field.

3. Enter any of the other parts of the location generation parameters as needed making sure that the pattern in the Starting fields are consistent with the patterns in the corresponding ending fields.

4. Enter/select generation data in the lower half of the screen. This data will be applied to each location you generate.

5. Click the Generate Locations button located on the toolbar.

6. If there are any problems with the parameters you will receive a message explaining the problem. If the parameters are valid, you will receive a message explaining how many locations will be generated and you will be given an opportunity to continue the generation process or cancel the process. Click “Yes” to continue, “No” to cancel.

7. If you clicked “Yes” to continue the generation process the new locations will be generated and you can view them with the Location Control screen or the Location Summary screen.

Examples:

	First	Second	Third	Fourth	Fifth
Starting Location	1				
Ending Location	5				

The parameters above will generate the following locations: 1, 2, 3, 4, and 5

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1				
Ending Location	Stock5				

The parameters above will generate the following locations: Stock1, Stock2, Stock3, Stock4, and Stock5

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin001			
Ending Location	Stock5	Bin010			

The parameters above will generate the following locations: Stock1Bin001, Stock1Bin002... Stock1Bin010... Stock5Bin001... Stock5Bin010

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin001			
Ending Location	5Stock	Bin010			

The parameters above will cause an error message indicating that the pattern in the ending location is not consistent with the pattern in the starting location in the first parameter position.

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Bin010			
Ending Location	Stock5	Bin001			

The parameters above will cause an error message indicating that the pattern in the ending location is less than the pattern in the starting location in the second parameter position.

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	Row001	Aisle1	Shelf1	Bin001
Ending Location	Stock1	Row001	Aisle1	Shelf1	Bin999

The parameters above will generate the following locations: Stock1Row001Aisle1ShelfBin001, Stock1Row001Aisle1ShelfBin002... Stock1Row001Aisle1ShelfBin999

	First	Second	Third	Fourth	Fifth
Starting Location	Stock1	R1	A1	S1	B1
Ending Location	Stock1	R1	A1	S10	B5

The parameters above will generate the following locations: Stock1R1A1S1B1, StockR1A1S1B2... Stock1R1A1S1B5... Stock1R1A1S2B1... Stock1R1A1S10B1... Stock1R1A1S10B5

Advanced Installation

TFG4000 provides some advanced installation functionality such as: font sizes, system variables, server start up options, BAT file options for single user and multi user modes.

Please refer to the System Administration User Guide for more information.

Documentation

TFG4000 documentation (in PDF format) is available online at www.tfg4000.com, through the "Documentation" menu on each screen, or from the Windows "Start" menu. Simply click "Start", then "Programs", then "TFG4000 V1.4", and then "Documentation".

Note: PDF files require Adobe® Acrobat® Reader. The reader is available at www.adobe.com free of charge.

Registration

Quick & Easy Online: After installation, you can go to our web page at www.tfg4000.com to register the product. Click on "Register" and follow the instructions.

Suggestions

We are eager to improve TFG4000, and we urge you to tell us what you think of the software and how it could be improved to better suit your needs. We have taken many suggestions from our customers and incorporated them into our products. If you have suggestions or comments, please send an e-mail to tfg4000@fredrickgroup.com. We want to hear from you!

Services

The Fredrick Group, Inc. offers assistance in data conversion. For more information, contact The Fredrick Group, Inc. directly by either:

E-mail Send an e-mail to tfg4000@fredrickgroup.com, with 'Services' in the subject line.

Phone Call **770-844-8516** between 8:30 AM - 5:00 PM ET.

Support

Note: You must be registered in order to receive support.

Initial Installation Support

The Fredrick Group, Inc. provides free initial installation support via e-mail. Installation support is available for 30 days, and is activated when you send your first message. You may also receive installation support by calling, but you must pay the cost of the call. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

Pay-As-You-Go Support

Additional fee-based support is available. You pay the cost of the call plus an additional fee. Credit card information must be provided and confirmed before a call is accepted. Technicians are available on a limited basis Monday through Friday from 8:30 am to 5:00 pm Eastern time. The TFG4000 product technical support number is **770-844-8516**.

Contact The Fredrick Group, Inc. at tfg4000@fredrickgroup.com for more details.

Other Support Options

Other support options are available.

Contact The Fredrick Group, Inc. at tfg4000@fredrickgroup.com for more details.

Note: Support plans and fees are subject to change without notice.

TFG4000 Software Series

You can obtain the following TFG4000 applications by visiting your nearest retailer:

Inventory Management
Job Order Management
Sales Order Management
Purchasing Management

For more information go to www.tfg4000.com.