



DSD Business Systems

Sage 100 Enhancements

TC11

User Defined Fields for TimeCard

TC-1011

Version 5.40



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User Defined Fields for TimeCard User's Manual
Version 5.40

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DSD Business Systems
8787 Complex Drive
Suite 400
San Diego, CA 92123
858/550-5900 8:00am to 5:00pm PST
858/550-4900 Fax

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Section A: Introduction

This manual contains a description and instructions for this DSD product. Operating instructions are included for the features added by this product to Sage 100. For instructions on using Sage 100, refer to the appropriate Sage 100 manual, or call your Sage 100 reseller. DSD Business Systems offers excellent Sage 100 support, at an hourly rate.

Web Resources

DSD web site: <http://www.dsdinc.com>

The Enhancement page contains:

- Current Release Schedule*
- Purchasing Information*
- Installation Instructions*
- Product Support*
- Enhancement Links*

1011 User Defined Fields for TimeCard:

<http://www.dsdinc.com/enh/pages/1011.htm>

The product web page contains:

- Product Description*
- Web Links*
- Current Product Version Table*
- Product Installation File Download*
- Product Manual in .pdf Format*
- Revision History*
- FAQ*

Support

DSD provides product support through Sage 100 resellers. Support is provided for the current version. Older versions are supported at an hourly rate. DSD's telephone number is **858-550-5900**. Fax: **858-550-4900**.

For a hard error, where the program displays an error dialog, report:

- Error number.*
- Program name.*
- Line number.*

Program version.

Exact sequence that caused the error, including menus and menu selections.

Other pertinent information.

If leaving a message or faxing, please include:

Your name.

Your phone number (and fax if applicable) and extension.

It is possible to be unable to duplicate a problem, because of data corruption or because we have not exactly duplicated a particular operating environment. In such circumstances, we can only continue to try to fix the problem if we can either access the system remotely or by some other to duplicate the system.

User Defined Fields for TimeCard Features

This Extended Solution to the TimeCard module creates up to 30 User Defined Fields (UDFs) for TimeCard data entries. The fields may be defined as a String, Uppercase string, Date, Yes or No flag, Numeric (with a mask) or G/L Account Number. All of the UDFs can be validated during Maintenance by creating validation entries using the provided Validation Field Maintenance program. Additionally, this Extended Solution creates a new option for the TimeCard Report that will use field 1 as a sort and selection option.

Section B: Getting Started

CAUTION

- If you reinstall or upgrade one of the Sage 100 modules listed in the following table, you must also reinstall this Enhancement.
- Enhancements from different Sage Developers are generally not designed to work together. If installed together, problems are likely to occur.
- Check with DSD before installing more than one Enhancement.

Required Levels

Sage 100 Module	Module Required	Required Level
T/C	Y	5.40

Installation

1. **Back-up:** Exit all Sage 100 sessions. Back-up existing Sage 100 data.
2. **Check Levels:** Sage 100 module levels **must match** those listed above.
3. **Run Enhancement Setup Program:** Save the executable installation program (sent to you or downloaded from our website) in a convenient location on the Sage 100 server. Launch the program from Windows Explorer or by selecting Start/Run, and then browse for the file in the location you saved it. Follow on-screen instructions.
4. **Send your Sage Serial Number to your DSD Representative:** Send your Sage Serial Number to your DSD representative in order for us to send you back the encrypted keys to unlock your system. This serial number can be found in Library Master\Setup\System Configuration, Tab 3. Registration as Serial Number.
5. **Re-Start Sage 100:** Sage 100 will be updated.
6. **Unlock the Enhancement:** DSD Enhancements must be unlocked to run. When any part of the Enhancement is run for the first time, the **DSD Enhancement License Agreement and Activation** window will appear. Follow the steps shown on that window. *You can click the Help button for more detailed instructions.*

Note: On the next page is a screenshot of the DSD Enhancement License Agreement and Activation window.

After accepting the License Agreement, you can then select the type of unlocking that you'd prefer. The choices are File, Web, Demo and Manual Entry.

File Unlock: After receiving your encrypted serial number key file from DSD, and placing that file in the MAS90/SOA directory, selecting this option will unlock all products keys contained in the file. This means you can unlock all enhancements at once using this option.

Web Unlock: If the system that is running the DSD Enhancement *has web access* and you *have sent DSD your Sage Serial number*, you can unlock the Enhancement without assistance using Web Unlock. When this option is selected, the program will attempt to download encrypted serial number key file from DSD *and then proceed to unlock all enhancements contained in the file*.

- The Sage 100 system that is being used must have web access for this option to be effective.
- You can send your Sage Serial Number to your DSD Enhancements sales representative.

Demo Unlock: If a Demo mode is available for the Enhancement you're running, you will be able to Demo unlock the product without assistance from DSD for demo purposes.

- Creating a Demo Unlock is a good way to temporarily unlock DSD Enhancements off-hours, if you do not have web or email access. Later, you can unlock the product fully, during business hours.

Manual Entry Unlock: If you want to unlock a single enhancement using a single encrypted key, you can select this option and enter the 64 character key you receive from DSD by copy and paste.

Note: You can also unlock a DSD Enhancement through the [DSD Enhancement Control Panel](#) found on the Library Master Utilities Menu. Then, select the Enhancement with your mouse from the list of Enhancements and click the **Unlock Product** button on the right side of the window.

- Convert Data:** After unlocking, the DSD Conversion Wizard will appear. Follow on-screen instructions to complete data conversion. You can exit the conversion program without converting data. The Enhancement will not proceed, however, until data is converted. If you enter an enhanced program and data has not been converted, the conversion program will run again.

DSD Enhancement Control Panel

Starting with version 3.61, all DSD Enhancement products include DSD’s Enhancement Control Panel. The **DSD Enhancement Control Panel is accessed from the Library Master Utilities menu.**

The DSD Enhancement Control Panel is a simple to use yet powerful system to help maintain DSD Enhancements installed on a Sage 100 system. To use it, select an Enhancement product from the list on the window and then click the button, on the right side of the window, which corresponds with the desired task.

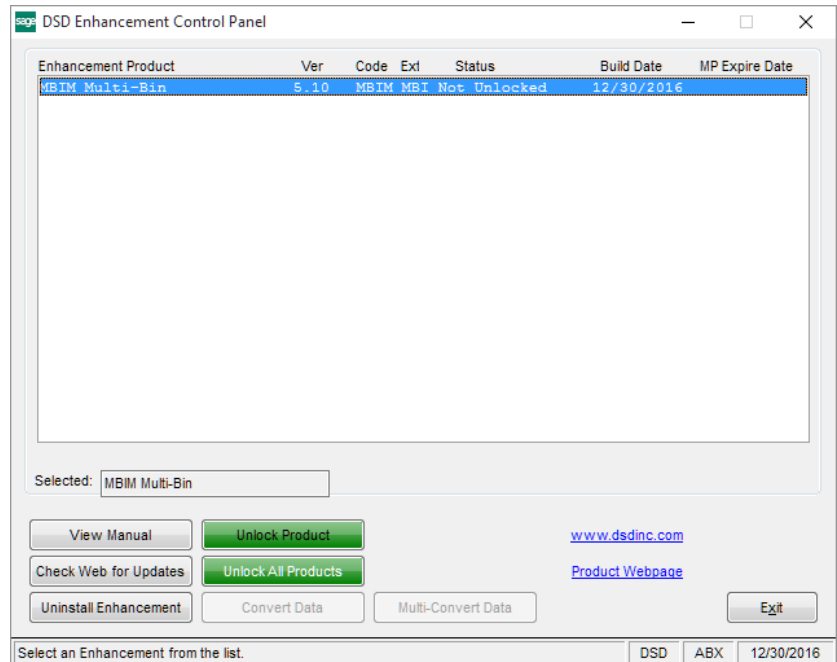
View Manual: This button will display the product manual for the selected Enhancement using Adobe Acrobat. For this to be possible, the PDF file for the corresponding manual must be in the “MAS90/PDF” folder in the Sage 100 system. If the file is not present, and the system has web access, the correct PDF file will be automatically downloaded from the DSD website, put into the “MAS90/PDF” folder and then displayed.

Check the Web for Updates: This button will check the DSD website to see what the current build is the selected Enhancement and alert the user if a later version is available. *This requires an internet connection on the Sage 100 system.*

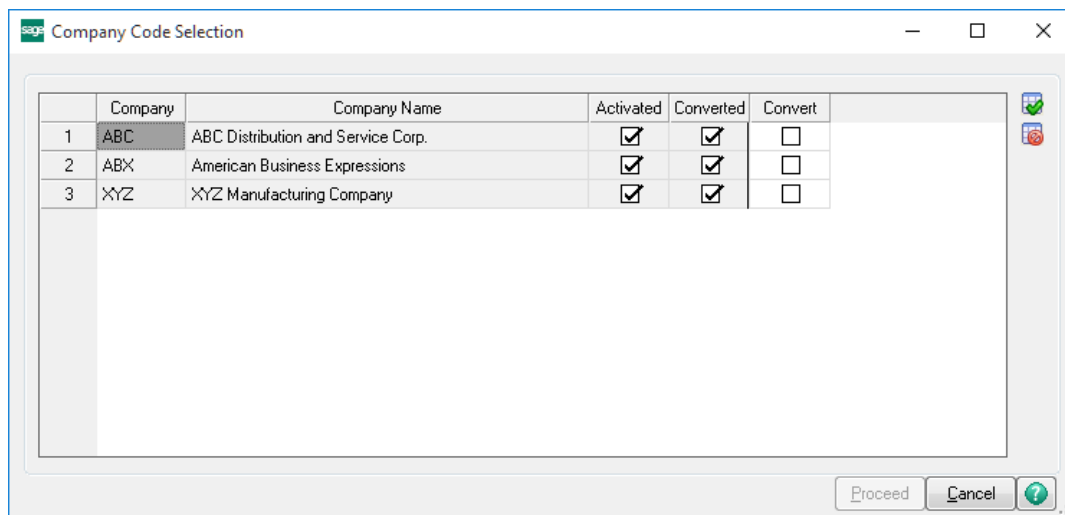
Unlock Product: This will cause the DSD Enhancement License Agreement and Activation window to appear. Using this window is described on the previous page. *This button is disabled if the selected Enhancement is already unlocked or if unlocking is not required.*

Unlock All Products: This will cause the DSD Enhancement All License Agreement and Activation window to appear. This window is similar to the one described on the previous page, but has only web and file as options to unlock. *This button is never disabled.*

Convert Data: After verification, the selected Enhancement’s data conversion program will run. Data conversion is non-destructive, and may be triggered any number of times. Sometimes this is required to fix data records imported or updated from a non-enhancement installation.



Multi-Convert Data: Multiple Companies can be converted at the same time for a given Enhancement. *(If you have a large number of Companies to convert, please do in batches of 20 or fewer due to memory limitations.)*



Help: The Help button, located at the bottom right of the window, opens an HTML help file.

Get Adobe Acrobat: Opens the Adobe Acrobat website to the page where Acrobat can be downloaded and installed.

Uninstall Enhancement If this option is available, then selecting this button will start the un-install process, removing the enhancement from the system. (for more information see [Uninstall DSD Enhancements](#))

Section C: Setup

Upon completion of software installation, you will need to access the DSD Extended Solutions Setup from the TimeCard Setup menu. Select this part number and the Setup screen for this Extended Solution will appear. Check the 'Enable DSD Extended Solution' box to activate this Extended Solution.

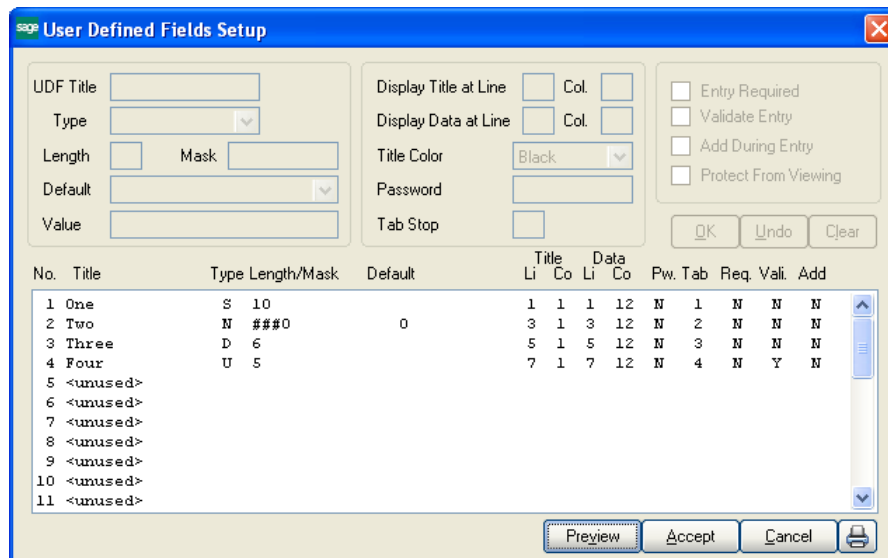
If you have the old version of this Extended Solution, which only has one UDF, you will receive a message prompting you to convert the Setup and Data from the old TC-1011 to the new TC-1011. The existing information will become the information in field number 1 allowing you to continue using Report Master and other Extended Solutions that expect to find that data in a specific location. You **must answer 'Yes' to convert** data if you wish to enable this Extended Solution. Answering 'No' to this question will stop the conversion process. Note that field number 1 must be set up and cannot be longer than 10 characters. Answer the following prompts:

Print UDF #1 On TimeCard Report When Sorted By Job #/Cost Code: Check this box to print the first UDF instead of the Earnings Code Description (Figure 1). See Figure 6 for an example.

Print UDF #1 On TimeCard Report When Sorted By Employee/Earn Code: If TimeClock is enabled, you may check this box to print the first UDF instead of the Exception Codes (Figure 1). See Figure 6 for an example.

Display UDF 1 on the Additional Tab in TimeCard Entry: Check this box to display UDF 1 on the Additional tab in TimeCard Entry

The remaining Setup prompts will allow you to tailor this Extended Solution to your specific needs. Click the 'UDF Setup' button and you will be presented with a pop-up window.



Field Title: You can assign a title of up to 15 characters. Leave this prompt blank if you do not want to use a title.

Type: Select a UDF type.

Mask or Length: If you choose a Numeric field, enter the 10-character mask. If you choose the G/L Account Number type UDF, note that it has a fixed length of 9 characters. If in Setup you chose a type 'Upper' or 'String' field, the length of the field (up to 60 characters) will be entered here. Field types 'Yes/No' and 'Date' have internally fixed lengths, so nothing will be entered here.

There is a 'rule' regarding field length for String or Uppercase String fields. The length of each field is fixed internally at 10 characters. Although the string length described above can contain up to 60 characters, if you use more than the internally fixed 10-character length, Setup will automatically assign the next fields' data space to store the extra characters. The last field number that can be a full 60 characters is field 25. For example: If field 1 is defined as 57 characters, fields 2, 3, 4, 5, and 6 will not be available. The next available field will be number 7.

Default Field Value: When creating a new item, the value entered here will be the field's initial value.

Display Line/Tab of UDF Title/Data: Enter the desired Line and Tab positions for the display of this field.

Title Color: Select the color of the UDF title.

Password: Enter a password required to access/view a UDF.

Tab Stop: Specify the order in which you want to have this field presented when UDFs are entered.

Entry Required: If you check this box, the field cannot be left blank. Leave it blank if you want to allow blank fields.

Note: For fields set up as type 'Yes/No,' the prompts for Validate Entry, Entry Required and Add During Entry will be disabled.

Validate Entry: Check this box to require that an entry must already be contained in the Validation File for the specific UDF number. See Validation Field Maintenance below for more information regarding the Validation File.

Add During Entry: Check this box if you want to add new validation entries wherever UDF Field Maintenance is available. Leave it blank if you wish to only allow validation through the Validation Field Maintenance program (see Validation Maintenance below).

Protect from viewing: You can access this option if you entered a password. Check this box to prevent the UDF from displaying during data entry and inquiry.

To print the UDF listing, click the printer button.

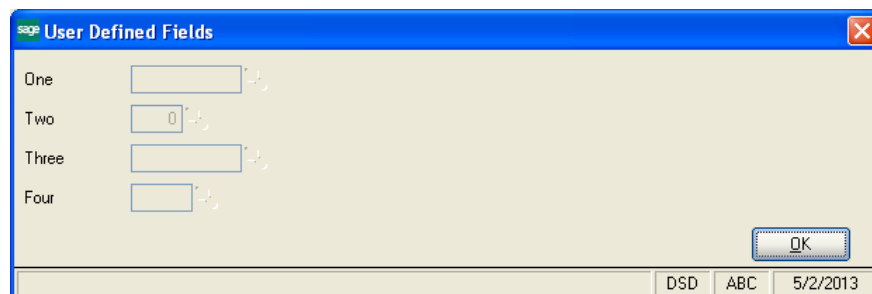
Duplicate tab stops are allowed and will be adjusted automatically. For example, both UDF 2 and UDF 3 have tab stops set up as 2, and UDF 4 has tab stop set up as 3. When you leave Setup, the tab stop for UDF 2 will stay the same, while the tab stop for UDF 3 will be changed to 3, and tab stop for UDF 4 will be changed to 4.

Note: Tab stop 0 will not be changed.

The 'UDF to Protect' and the 'Protect from Viewing' prompt do not have any affect on printing. The protected UDF will print normally.

If you checked the 'Display UDF 1 on the Additional Tab in TimeCard Entry' option, if UDF 1 is set up, its length does not exceed 10 characters, and it is not password-protected, it will be displayed and is accessible on the 'Additional' tab during TimeCard Entry and TimeCard Entry-New Entries Only. Tab Setting may be maintained for UDF 1.

The Setup screen has a Preview option available allowing you to see a test pattern of the Maintenance screen. Click the 'Preview' button to preview your settings.



You should visit this Setup screen after each upgrade or reinstallation of this Extended Solution.

Validation Maintenance

If the Validation File Maintenance program has not been previously added to a menu, you will see a pop-up screen that will ask if you want the program automatically added to the Setup menu. Answer 'NO' if you want to use standard Sage 100 Menu Maintenance to add the program to a menu you choose.

After selecting Validation Field Maintenance from the menu, you will be prompted for the UDF number, validation field and description. Lookup and Print options are available. The data you enter here will be used later for validation and lookup purposes during Item Maintenance entry of the corresponding UDF. Note that due to screen width limitations, the validation field description will be shortened during a Lookup to accommodate a field length of no more than 40 characters. Optionally, if you answered Yes to the 'Add During Entry' Setup question, you can validate entries wherever UDF Field Maintenance is available.

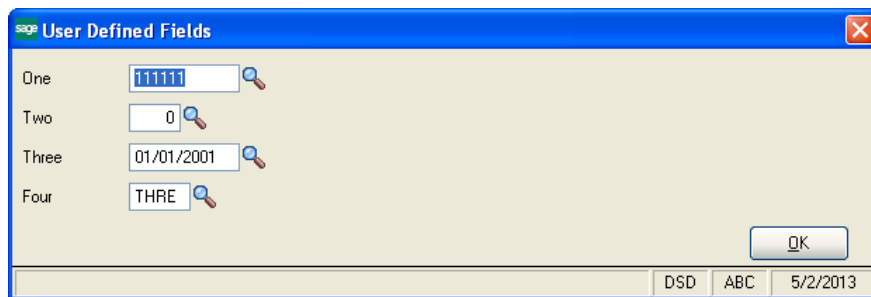
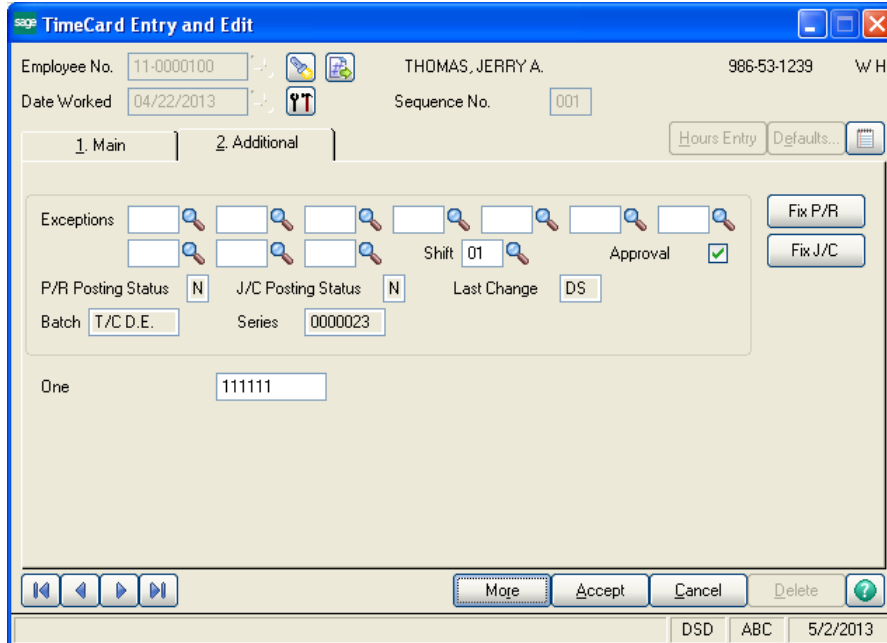


Be careful when requiring validation for a field. If the creation of new validation values during data entry is not allowed, a 'lock up' situation can occur when field validation is required but no valid values have been set up in Validation Maintenance for that field.

Section D: System Operations

TimeCard Entry

During TimeCard Entry and Edit and TimeCard Entry-New Entries Only, the UDFs are accessible by clicking the 'More' button. If UDF 1 is on the 'Additional' tab, upon entry of this field, the UDF window will also appear.

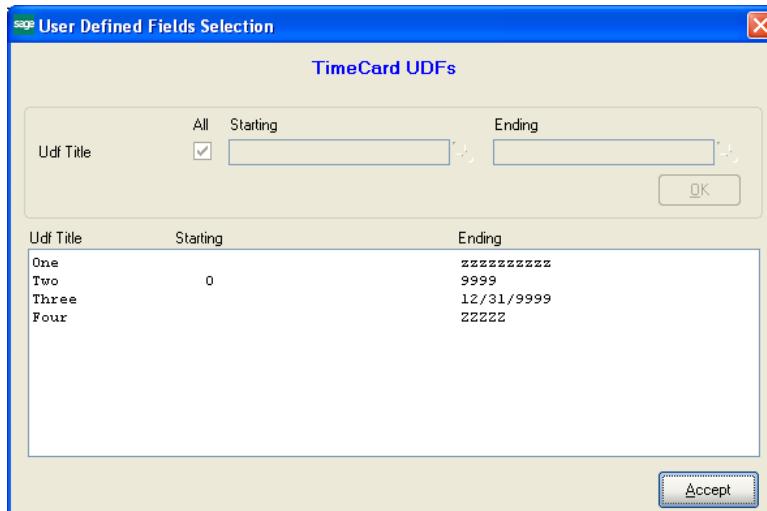
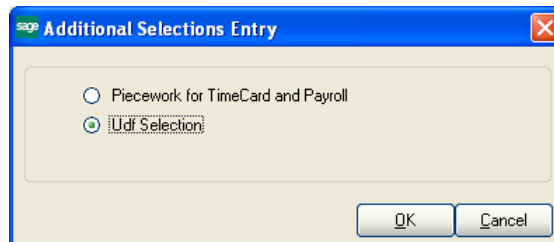
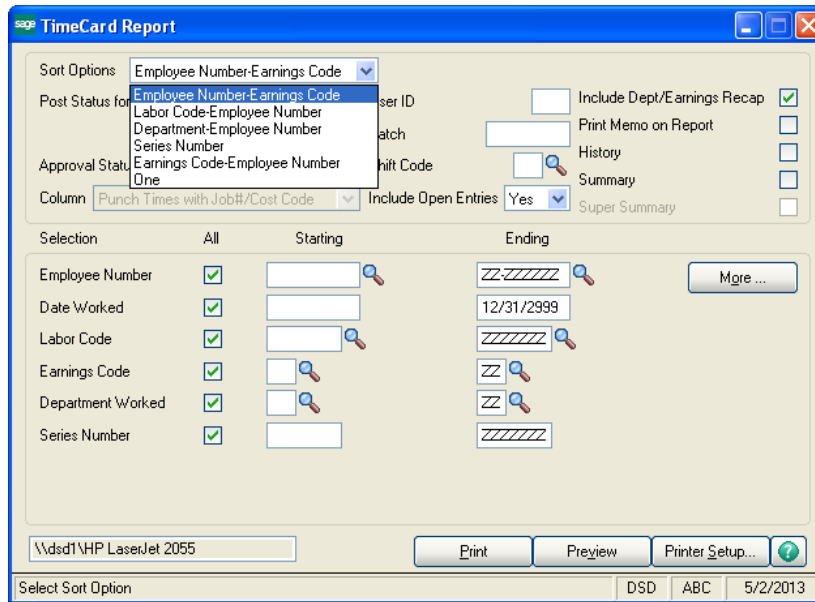


TimeCard Inquiry

UDFS are available for inquiry by clicking the 'More' button. The first UDF may appear on the 'Additional' tab (see Setup).

TimeCard Report

The TimeCard Report, available from the TimeCard Reports Menu, now has a sort option to sort by the UDF number 1. When the UDF is selected as the primary sort option, a sub-sort by Employee Number will be performed. Employee and UDF totals will print. Regardless of the sort option chosen, a selection option is available to choose a range of UDF values by clicking the 'More' button. Depending on Setup, the first 10 characters of UDF1 may be printed on place of standard MAS 90 MAS 200 fields.



See examples below for report sorted by UDF, Job Number/Cost Code and Employee Number/Earnings Code

Naughty Donuts Company												
TIMECARD REPORT												
SORTED BY PROJECT												
DATE WORKED	DP	LABOR CD	EARNINGS CODE	JOB NUMBER	COST CODE	ST LOC	WORK. COMP	P	J	USER ID	HOURS WORKED	AMOUNT PAID
PROJECT SWIM POOL												
11-0000100		Portilla, William										
08/16/99	11	0000001 Warehouseperson	01 Regular			WI A	9999999	N	N	NDC	40.00	3,000.00
1 ENTRY FOR EMPLOYEE 11-0000100 TOTAL:											40.00	3,000.00
11-BEJ Johnson, Bryan												
07/03/99	11	0000002 Serviceperson	07 Sick Pay	0000-001	001-000-000	SP		N	N	NDC	4.00	200.00
1 ENTRY FOR EMPLOYEE 11-BEJ TOTAL:											4.00	200.00
2 ENTRIES FOR PROJECT SWIM POOL:											44.00	3,200.00
2 ENTRIES FOR REPORT TOTAL:											44.00	3,200.00

Naughty Donuts Company														
TIMECARD REPORT														
SORTED BY JOB NUMBER/COST CODE														
EMPLOYEE NUMBER/NAME	DATE WORKED	DP	EC	PROJECT	LABOR CODE	ST LOC	WORK. COMP	P	J	USER ID	HOURS WORKED	AMOUNT PAID		
JOB NUMBER: 0000-001 ESTIMATE NUMBER ONE														
COST CODE: 001-000-000 COST CODE ONE														
11-0000100	Portilla, William	02/10/99	11	01	BRIDGE	0000001	Warehouseper	CA	0000001	N	N	NDC	40.00	3,000.00
11-0000120	THOMPSON, JOHN	02/11/99	11	01	BRIDGE	0000001	Warehouseper	WI	9999999	N	N	NDC	00	00
11-0000210	JONES, WILLIAM	01/20/99	11	01	BRIDGE	0000001	Warehouseper	WI	9999999	N	N	NDC	00	260.00
11-BEJ	Johnson, Bryan	07/01/99	11	01	BRIDGE	0000002	Serviceperso	SP		N	N	NDC	9.00	450.00
4 ENTRIES FOR COST CODE 001-000-000 TOTAL:											49.00	3,710.00		
4 ENTRIES FOR JOB NUMBER 0000-001 TOTAL:											49.00	3,710.00		
4 ENTRIES FOR REPORT TOTAL:											49.00	3,710.00		

Naughty Donuts Company													
TIMECARD REPORT													
SORTED BY EMPLOYEE NUMBER/EARNINGS CODE													
DATE WORKED	LABOR DP CODE	PUNCH IN/OUT TIMES	EC	PROJECT	JOB NUMBER	COST CODE	ST LOC	WORK. COMP	P	J	USER ID	HOURS WORKED	AMOUNT PAID
11-0000100	Portilla, William												
01 Regular	11	0000001	07:00 AM	BRIDGE	0000-001	001-000-000	CA	0000001	N	N	NDC	40.00	3,000.00
1 ENTRY FOR EARNINGS CODE 01:											40.00	3,000.00	
1 ENTRY FOR EMPLOYEE 11-0000100 TOTAL:											40.00	3,000.00	
DEPARTMENT 11 EARNINGS CODE 01:											40.00	3,000.00	
DEPARTMENT 11 TOTAL:											40.00	3,000.00	
1 ENTRY FOR REPORT TOTAL:											40.00	3,000.00	

Average Hourly Pay Report

The Average Hourly Pay also has the option to select by ranges of UDFs, accessible via the 'More . . .' button.

Helpful Hints

- You may wish to use the Preview option to verify that a field and its title will fit within your screen boundaries.
- Be careful when requiring validation for a field. If you do not allow the creation of new validation values during data entry (see Setup above), you can create a 'lock up' situation if you require validation for a field but you have not set up any valid values for the field (in Validation Maintenance).
- The entry and report screen samples shown in the figures below may reflect fields and options that are not available without other TimeCard or TimeClock Extended Solutions or may reflect different Setup options than you have active on your system. However, the general appearance of the UDF related prompts and options are not affected by these variations.
- You should avoid changing the type, size or masking of the UDF once you begin entering data; unusual results (especially during sorting) may occur.

Visual Integrator

The files listed below have been added or changed in the Data Dictionary by this Extended Solution for Visual Integrator purposes.

<i>New File:</i>	<i>Field:</i>
TC.TCARD_2	UDF01_STRING...to...UDF30_STRING UDF01_DATE...to...UDF30_DATE UDF01-NUMBER...to...UDF30_NUMBER
TC.TCHIST2	UDF01_STRING...to...UDF30_STRING UDF01_DATE...to...UDF30_DATE UDF01-NUMBER...to...UDF30_NUMBER
TC.VALID_F	UDF_NUMBER VALIDATION_FIELD DESCRIPTION

The Data Dictionary may contain other files and data fields that are not available without their corresponding Sage Software Extended Solutions installed.

Crystal Reports

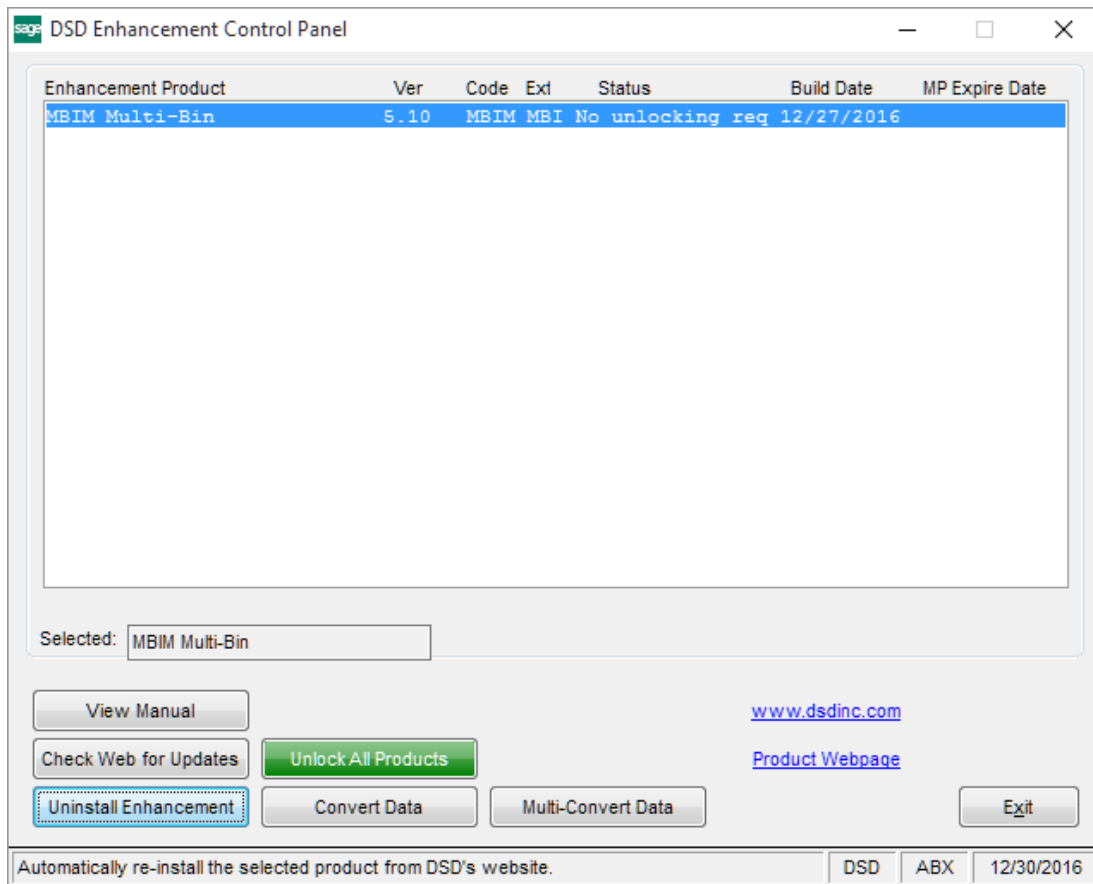
The files listed below have been added or changed in the Crystal Dictionaries by this Extended Solution for Crystal Reports purposes. Any additions or changes to the Crystal Dictionaries will be incorporated into your system after you set up the Extended Solution or when you use the Star Part (*PART) option from a menu.

<i>File:</i>	<i>Description</i>	<i>Field:</i>
TC_A1	TimeCard Masterfile 2	All Fields
TC_A3	TimeCard History File 2	All Fields
TC_VD	TimeCard Udf Validation	All Fields

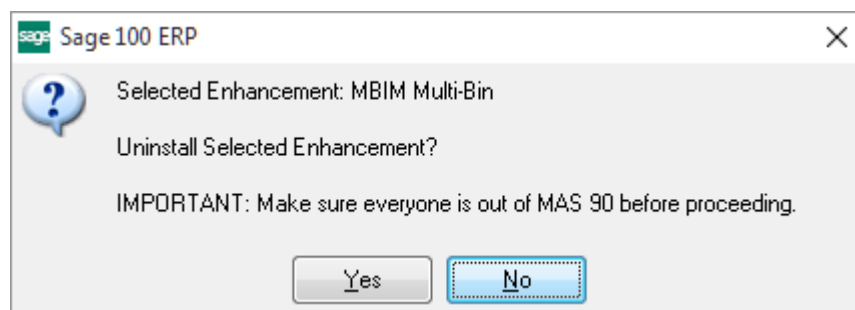
Be aware that the Crystal Dictionaries may contain other files and data fields that will be unavailable without their corresponding Extended Solutions installed.

Section E: Uninstall DSD Enhancements

A DSD Enhancements Uninstall Utility has been provided for the purposes of removing DSD Enhancements from your Sage 100 System. This utility may be accessed from the **DSD Enhancement Control Panel** menu option on the **Library Master / Utilities** menu.

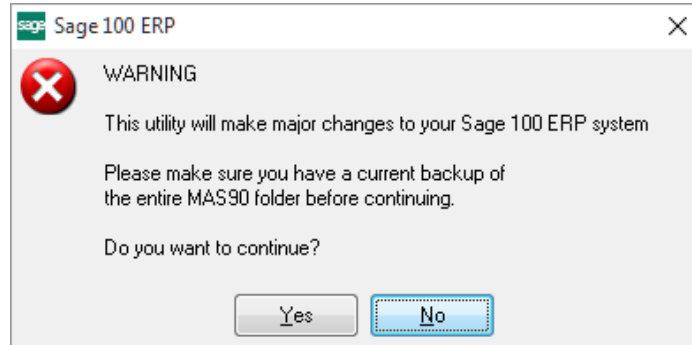


When accessing the **DSD Enhancement Control**, select the enhancement that you wish to Uninstall, and then select the **Uninstall Enhancement** button. The following message box will appear:



Select **No** to exit the Uninstall Process.
 Select **Yes** to continue with the Uninstall Process.

The following message box will appear, to remind you that a complete backup of your entire Sage 100 system should be completed prior to uninstalling a DSD product.



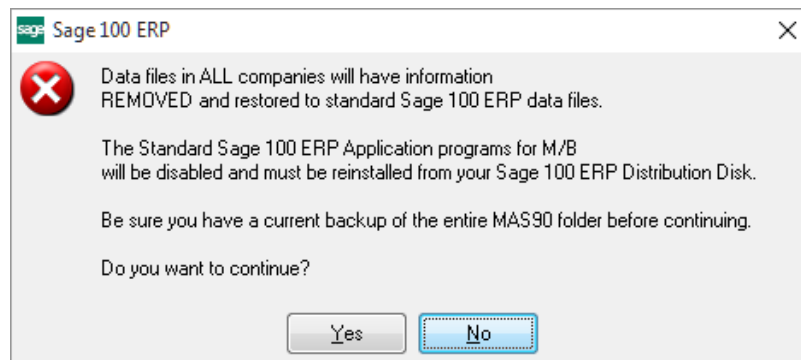
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

After the Uninstall of the DSD Enhancement, you MUST reinstall certain standard Sage 100 modules, followed by reinstallation of Product Updates and Hot Fixes, if applicable.

A message box will appear, and will display which of those specific Sage 100 modules you must reinstall afterwards.

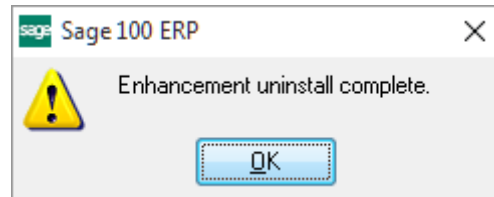
Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process.

The following message box will appear, displaying the final warning message.



Select **No** to exit the Uninstall Process.
Select **Yes** to continue with the Uninstall Process. At this point, the DSD Enhancement will be removed from the Sage 100 system.

After completion of the Uninstall, the following message box will appear. Select OK to continue.



Now that the Uninstall process is completed, you must:

- Reinstall the applicable standard Sage 100 modules
- Reinstall the latest Sage 100 Service Pack/Updates, if applicable.
- Reinstall any other DSD Enhancements or Developer products that are affected from the reinstallation of the standard Sage 100 module(s).