

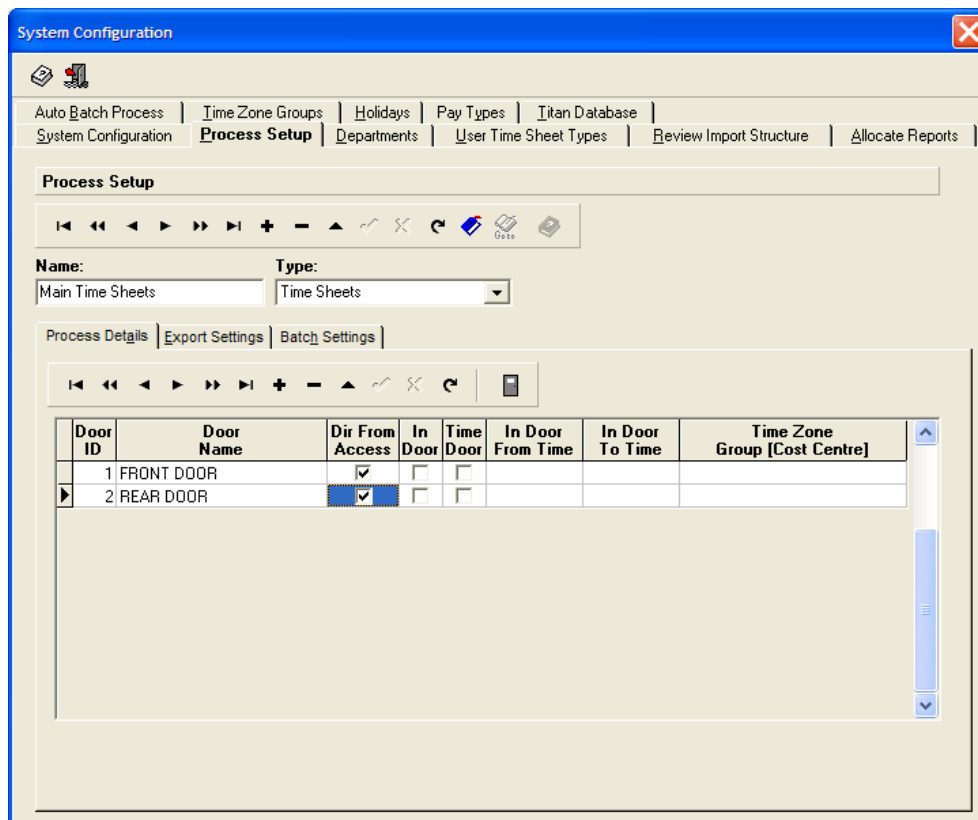
Configuring PSD Reporter for Payroll. (Prism Payroll configuration shown)

PSD Reporter should be installed on the same PC as AcceptNet.

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Creating a Time Sheet Process

1. Select System\Configuration from the main Reporter window.
2. Select the Process Setup tab.
3. Using the top database navigator, click the + button to create a new Process.
4. Give the Process a name, eg: Main Time Sheets
5. Select the Type as Time Sheets.
6. Using the top database navigator click the tick button to save the Process.
7. Under the name of the Process there are three tabs, select the Process Details tab.
8. On the navigator is a Door button. Click this to retrieve door references from AcceptNet.
9. On the same navigator click the + button to create a door record.
10. Click in the DoorID field to select from the list of available doors.
11. Continue to add all the doors (or readers) that are to be used for Time Sheet reporting.
12. If the Concept has been programmed to produce card access events that include the proper direction then check the field labelled Dir From Access for each door.
13. Once finished adding doors, click the tick button to save the final record.



Configuring Export Settings

1. Select the Export Settings tab on the Process Setup tab of the System Configuration Window. This is where the data format and destination file is specified.
2. Click the Modify format button. The following window is displayed.

Field	Format Data Ref	D & T Format	Justify	Width	Pad	Pad Char
Area Status Direction	<AreaSD>		None	0	<input type="checkbox"/>	0
Birth Date	<BirthDa>	dd/mm/yyyy	None	0	<input type="checkbox"/>	0
Birth Month	<BirthMo>		None	0	<input type="checkbox"/>	0
Blank Space Data 1	<BlankSp1>		Right	15	<input checked="" type="checkbox"/>	
Blank Space Data 2	<BlankSp2>		Right	10	<input checked="" type="checkbox"/>	
Blank Space Data 3	<BlankSp3>		Right	45	<input checked="" type="checkbox"/>	
Blank Space Data 4	<BlankSp4>		None	0	<input type="checkbox"/>	0
Blank Space Data 5	<BlankSp5>		None	0	<input type="checkbox"/>	0
Blank Space Data 6	<BlankSp6>		None	0	<input type="checkbox"/>	0
Card No.	<CardNo>		None	0	<input type="checkbox"/>	0
Company	<Company>		Right	5	<input checked="" type="checkbox"/>	

Note: Format Data Ref is the reference used to access this information.

Data Format:

<Company><PayrollRe><BlankSp1><DateT><BlankSp2><STimeSta><STimeStB1><STimeEndB1><STimeStB2><STimeEndB2><STimeFin><BlankSp3>

Status:

3. Click the Set Prism Format button. If not exporting to a Prism payroll system then select the fields to be exported by double clicking on the required fields. The format of each field can be set according to the justify, width, pad, pad char & D&T Format options.
4. Exit the Select & Set Field Export Settings window.
5. Select the destination path for the AWARD.DAT file.

System Configuration

Auto Batch Process | Time Zone Groups | Holidays | Pay Types | Titan Database |
 System Configuration | **Process Setup** | Departments | User Time Sheet Types | Review Import Structure | Allocate Reports

Process Setup

Name: Type:

Process Details | **Export Settings** | Batch Settings

Data Format

Export Data:

Accumulated Data:

Convert "in" to: Convert "out" to:

Export Time Sheet Data by Date & Time, else by UserID

Export Time Sheet IN & OUT Data, Else Only OUT Data

Destination Folder/File

Export Data:

Accumulated Data:

Create New File Each Export, else Append to File

Rename Existing Export Data File With Following Appendage:

Terminate Line with CR\LF

Configuring Batch Settings

1. Click the Batch Settings tab on the Process Setup tab of the System Configuration window.
2. Use these options to set how often the data is processed and exported to the AWARD.DAT file.

The screenshot shows the 'System Configuration' window with the 'Process Setup' tab selected. Within this tab, the 'Batch Settings' sub-tab is active. The 'Name' field is set to 'Main Time Sheets' and the 'Type' is 'Time Sheets'. The 'Process When' section is configured with 'Selected Days' checked for Monday through Friday, starting on 27/10/2003 at 01:00:00. The 'Process To' option is set to 'Midnight Previous Day'. The 'End of Pay Period Process' section has 'Start Date of Pay Period' and 'Number of Days' fields. The 'Time Sheet Settings' section includes options for 'Process Review', 'Calculate Times & Add Pay Codes', 'Export Data', and 'Purge Data' (set to 120 days). The 'Calculate Times Using' section is set to 'First IN, First OUT Found else Last IN, First OUT'.

3. For the above settings the process is run Monday to Friday at 1:00:00 am in the morning. The time sheet data is exported to the AWARD FILE on those days at that time for the previous days events.
4. The Purge Data option shows that 120 days of time sheet data will be stored in the time sheet database table. As new data is processed, earlier data is purged.

Synchronising User Information with AccepNet

1. Select Edit\View\Users menu item from the main window of PSD Reporter.
2. Select the 4th toolbar button from the left which is Synchronize with Head-End Database.

Source Database

AccepNet
 Titan

Settings

Reporter Field Name	Source Database Field Name
Surname	Last Name
First Name	First Names
Payroll Ref	PayrollRef
Department	Department
Info	

Do not Sync User if Surname contains US & * characters
 Build Department List from Department Field
 Make Imported Users - Current Users
 Users & UserIDs Are the Same in All Panels (PanelID not used)
 If not, then Review Import Structure should be "Accept Review without IDs" - see System Configuration

Make Not Time Sheet User

If Payroll Ref >
 If Reporter Field Set To:

If Not Set, Default The Following Fields To

Department: Yes
 Company: Yes
 T. Sheet Type: Yes
 Pay Type: Yes

If New User Set As

Time Sheet User
 Muster User
 Cost Centre User

Status:

3. Select the Source Database as AccepNet
4. In the Source Database Field Name make the following matches:

Surname = LastName

First Name = First Names

Payroll Ref = PayrollRef (This field should be set in the User Editor – Extra Info section of AccepNet Client)

Department = Department

Company = Company (This field should be set in the User Editor – Extra Info section of AccepNet Client)

5. Click the lightning bolt toolbar button to synchronise with the user data in the AccepNet Head end.
6. Return to the System \Configuration window
7. Click the Process Setup tab

8. Click the + button to create a new process.
9. Call it Sync Users and make it's Type - Sync Users.

The screenshot shows the 'System Configuration' dialog box with the 'Process Setup' tab selected. The 'Name' field is 'Sync Users' and the 'Type' dropdown is set to 'Sync Users'. The 'Process When' section has 'Selected Days' checked, with all days from Sun to Sat also checked. The 'Every' checkbox is unchecked, and the 'Days' field is set to 14. The 'Start' date is 27/10/2003. The 'After Last Time' is 12:30:00. The 'Last Auto Batch' dropdown is empty. The 'Sync Users Settings' section has 'With File Import Settings' unchecked and 'With Head-End Database Settings' checked.

System Configuration

Auto Batch Process | Time Zone Groups | Holidays | Pay Types | Tital Database |
System Configuration | **Process Setup** | Departments | User Time Sheet Types | Review Import Structure | Allocate Reports

Process Setup

Name: Sync Users Type: Sync Users

Process Details | Export Settings | **Batch Settings**

Process When

Selected Days Sun Mon Tue Wed Thu Fri Sat

Every 14 Days, Start: 27/10/2003

After Last Time: 12:30:00

Last Auto Batch:

Sync Users Settings

With File Import Settings

With Head-End Database Settings

10. Specify which days the process should run.
11. Specify time to process. It should be prior to time set for the Time Sheet Process.
12. Check the With Head End Database Settings checkbox.
13. Click the tick button on the database navigator to save these settings

Auto Backup Processing

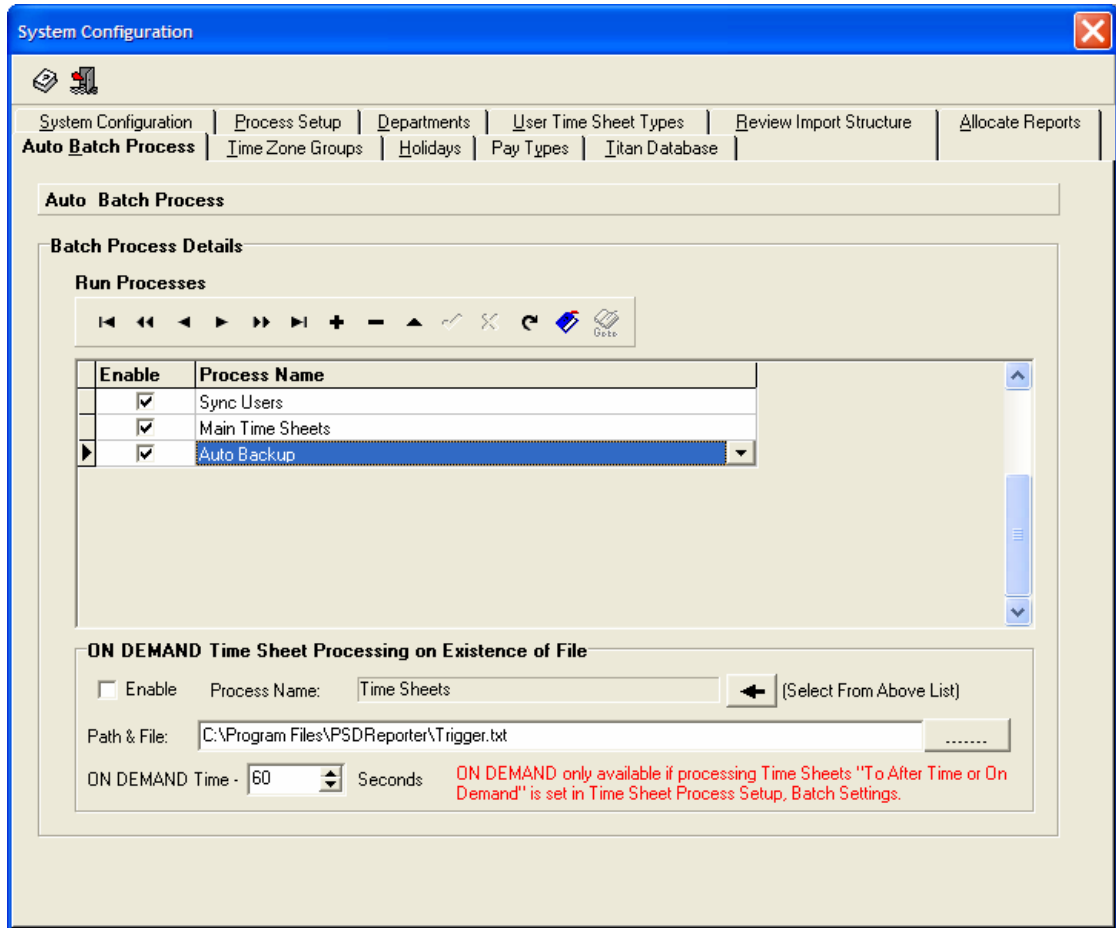
1. Click on the Process Setup tab on the System Configuration window.
2. Create a new process by clicking on the + navigator button
3. Call the process Auto Backup and make the Type – Backup

The screenshot shows the 'System Configuration' window with the 'Process Setup' tab selected. The 'Name' field contains 'Auto Backup' and the 'Type' dropdown is set to 'Backup'. Below this, there are tabs for 'Process Details', 'Export Settings', and 'Batch Settings'. The 'Process When' section has 'Selected Days' checked, with 'Sun' unchecked and 'Mon', 'Tue', 'Wed', 'Thu', and 'Fri' checked. The 'Every' field is set to 14 days, starting from 27/10/2003. The 'After\ Last Time' is set to 02:00:00. The 'Last Auto Batch' field is empty. The 'Backup Settings' section shows a 'Backup to Folder' field with the path 'c:\program files\psdreporter\backup'.

4. Select the days the backup process should run.
5. Select the time the process will run. This should be set to after the Time Sheet Process.
6. Select the folder where the backup zip file is to be created. It is recommended that is be on the c: drive. A copy of this backup can be moved to a server PC as required.
7. Click the Tick button to save the changes.

Adding Processes for Auto Batch Processing

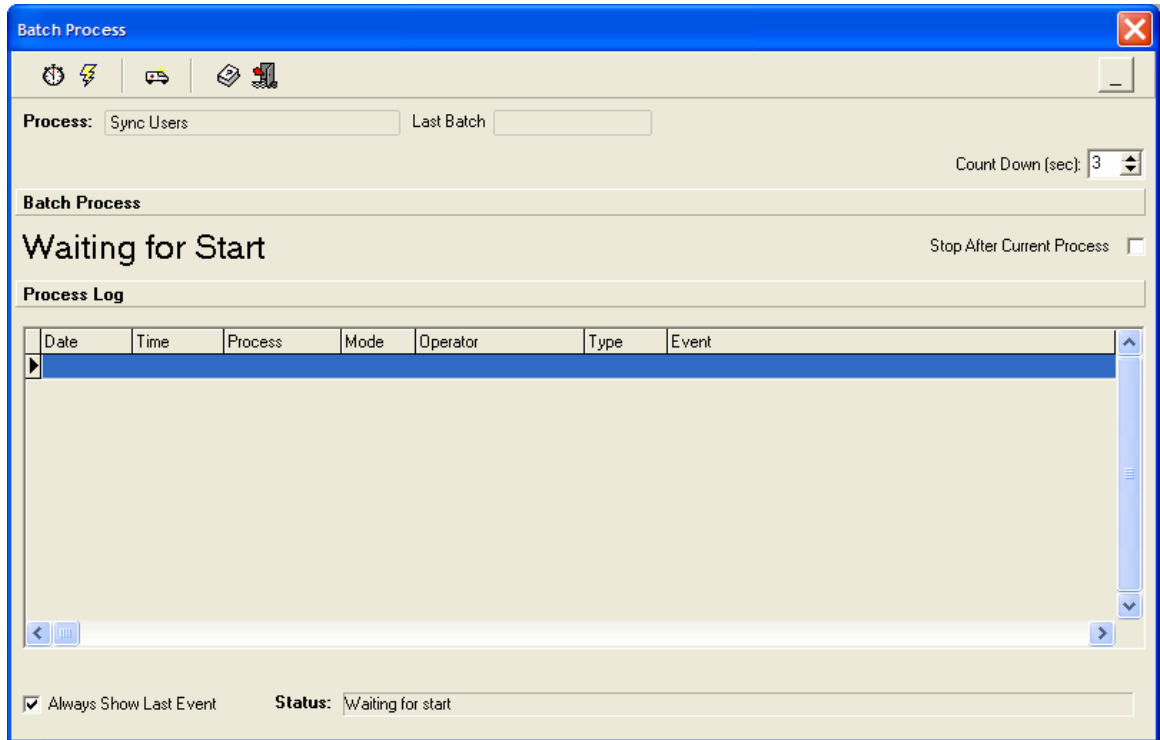
1. Click the Auto Batch Process tab at the top of the System Configuration window.
2. Click the + navigator button to add a process to the Run Processes list.
3. Click in the Process Name to select one of the created processes.



4. A typical list for time sheet processing is shown above.
5. Click the tick button to save the changes.

Placing PSD Reporter into Auto Batch Processing Mode

1. From the main window of PSD Reporter click the Auto Batch Processing button or select System\Auto Batch.
2. The following window will appear.



3. Click the Start Time for Batch Processing button (Timer Button) to start the batch processing. Waiting for Start will change to Counting Down. PSD Reporter must be in this mode to automatically process user access events for any of the processes created. The Process Log will show the stages of processing.