



Summer 2004

TAC Industries, a Leader in Providing Employment Services

Congratulations to Mary Brandstetter of TAC Industries in Springfield, Ohio. Mary was the winner of the find-a-word contest in the spring issue of *Vertex*, correctly identifying the scrambled word as *Pathway*. She plans to donate her winnings to *TAC Journal*, their award winning, bimonthly newsletter.

Mary is the Director of Adult Services for the Clark County Board of Mental Retardation and Developmental Disabilities. TAC Industries is the work center for Clark County Board of MR/DD.

TAC Industries has a reputation for being one of the most progressive work centers in Ohio, providing a wide range of employment opportunities and habilitation services for 400 adults. TAC is supported by numerous local and national companies who contract with them for labor services. According to Cliff Meyer, General Operations Manager for TAC, "We serve a wide, diverse consumer population with uniquely varied skill levels, so we are fortunate to have a variety of organizations that work with us."

One of TAC's largest customers is the United States Air Force, with whom TAC has a contract to repair cargo nets.

Other operations are as diverse as doing metal fabrication for Rittal Corporation, sewing and assembling fiberglass straps for Kinedyne, and doing parts setting for brake shoes for TruTec.

In addition to employment opportunities, TAC employees enjoy socializing and having fun. Sponsored activities include bowling teams, volleyball teams, Special Olympic events, parties, and art classes, to name just a few.

On June 25, forty-six TAC athletes and their coaches participated in the Ohio Special Olympics. The track and field team had a strong showing, taking home 15 gold medals, 11 silver medals, and 13 bronze medals. The volleyball team was first in their division and the modified volleyball team took fourth in their division.

Two TAC employees won a recent art contest and, in addition to receiving \$100 each, will have their artwork displayed in the new CARF-CCAC office in Washington, D.C.

Vertex salutes TAC Industries for their excellent work and for the opportunities they provide to their employees. ✓

Newsletters Wanted

If your agency publishes a newsletter, please put Vertex on the mailing list. We like to stay current on your activities, events, and other happenings. Mail the newsletters to the address on the back page, attn. Newsletter. If you publish electronically, e-mail us at newsletter@vertexsoftware.com.



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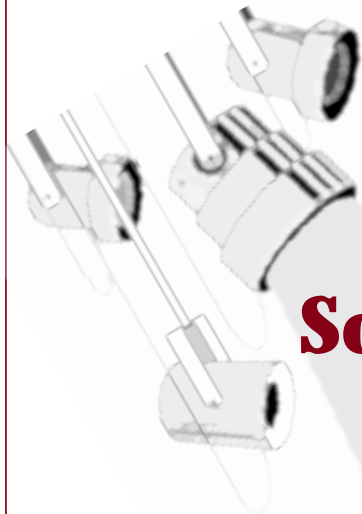
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Software Spotlight

Employee Export Improves Workflow

The new employee export from Pathway ProductivityTrac™ to Microsoft® Business Solutions-Navision® will help the payroll department avoid the last minute rush to set up new employees. With the Pathway 6.8 and Navision 3.01.3 or Navision 3.60.1 release, you will be able to send employee information prior to sending time and earnings. This gives the payroll department time to set up payroll and tax information for new employees prior to pay day.

Improved Export from ProductivityTrac to Navision to Ship before End of Year

Pathway ProductivityTrac™ 6.8.1 and Microsoft® Business Solutions-Navision® 3.01.4 or Navision® 3.60.1 will have a new option to use expanded summarization when sending time and earnings transactions from ProductivityTrac to Navision. In the current interface, transactions are summarized by pay type and it is often necessary for agencies to create manual journal entries to distribute labor expenses.

The improved interface will summarize transactions by alternate employee number, pay type, labor distribution account, transaction department, and job branch. In Navision, we are adding a mapping table that will allow you to specify how each piece of information is handled. Branch and department can be mapped to dimensions. Any part of the labor distribution account can be mapped to a payroll posting group or to a dimension. The pay type codes can be mapped to payroll control codes.

With the expanded interface and mapping table, you will be able to direct earnings to the correct general ledger accounts and use dimensions to enhance your reporting.

Dimension Restriction by User Available in Navision 3.01.3

Dimension restriction by user is now available in Microsoft® Business Solutions-Navision® 3.01 and Navision® 3.60.1. This feature restricts users from adding transactions for a branch, department, or area other than their own. With dimension restriction by user, each user can be restricted to only adding transactions with a specific global dimension value. Since most customers use branch as one of their global dimensions, the most common use for restriction by user is to prevent users from adding transactions for a branch other than their own branch. Users who cross multiple branches can retain the ability to add transactions for all branches, or all values for the restricted global dimension.

Dimension restriction by user does not prevent a user from viewing transactions for other departments. If you need even tighter control, additional restrictions are available to restrict users from viewing transactions in branches other than their own.

For more information about dimension restriction by user or view restrictions, contact Vertex Sales. And, for a recap of other types of dimension restrictions that are available in Navision 3.01 and 3.6, see *Q&A* on page 4.

Improved User Access to Protect Consumer Information

In Pathway 6.8, Vertex has improved the user access features and given you more options for restricting which information a user can view or edit.

You can grant users view-only, add, edit, or delete access to any subject tab or any plan component tab. Users can be granted view-only access if they need to see the information but should not have access to change it. Separate add, edit, and delete privileges gives you greater control over how information is added or changed in a subject. In many subjects, it may be appropriate for users to add new information, but not to delete existing records.

You can give users access to tools previously restricted to application administrators. You can assign rights for specific tools to the users who need them, rather than creating an application administrator who has rights to all the tools in the application. You can give many users the right to add Agency Help Notes without also giving them the right to update the Payroll System Options in Pathway

See *Spotlight* on page 5



The Wizard's Column

In this issue, the Wizard discusses monitoring your database with IB LogManager.

Many Vertex users have used the Pathway Case Management™ Change Stamp feature to identify the person who made the last change to a record. While this has been sufficient for some users, other want more detailed tracking capability. Have you ever needed to know who made a change to a particular piece of information to your database? Have you wanted to follow up when you discover that a certain record has been modified, deleted, or inserted? Perhaps you want to know exactly when a consumer's address was changed or who deleted a consumer's Social Security Number. Maybe you have a new data entry clerk and you want to double check their work for accuracy. Or perhaps a user just modified a host of information in the wrong consumer's file and you need to return the information to their original values. Maybe you are reviewing your HIPAA Confidentiality and Security procedures and have decided that you need to track which users are adding or changing information.

With IB LogManager™, you can monitor, at the field level, changes to your Pathway database for any tables you choose. IB LogManager can be configured to monitor additions, deletions, or modifications to any field in the Pathway database. Logged data can be viewed at any time for a date or date range, or for a particular user or all users. The original data is displayed with the new data, so you know what was there before the change.

To assist in a quick implementation, Vertex has created a standard definition file that includes tracking for the most common database elements. Once IB LogManager is setup, it runs continuously in the background watching for and logging changes to the tables you specify. Tracked information can be viewed on screen, printed, or exported to another application.

If you want more information about adding IB LogManager to your Pathway database, call Vertex Sales at (614)-318-7107. ✓

The screenshot shows the IB LogManager interface. The top table displays a log of changes:

DATETIME	USER	TABLE	OPERATION	PKEY1	PKEY1_VALUE	PKEY2
9/2/2004 9:08:30 AM	TAT	CONSUMER	UPDATE	CONSUMER_ID	1238	<null>
9/2/2004 9:07:51 AM	TAT	CONSUMER	UPDATE	CONSUMER_ID	1031	<null>

Below the log, there is a toolbar with icons for various actions and a status bar showing 'Count: 2' and 'Automatic' checked. The bottom table provides a detailed view of the selected change:

COLUMN	OLD VALUE	NEW VALUE	OLD BLOB VALUE	NEW BLOB VALUE
CONSUMER_ENTERED_BY	1052	1186	<null>	<null>
CONSUMER_ENTERED_DA	11-JUN-2001 13:53:33.0000	2-SEP-2004 9:08:21.0000	<null>	<null>
DISPLAY_NAME	Allen, Edward A	Allen, Edward Andrew	<null>	<null>
ETHNIC_ORIGIN_ID	<null>	1200	<null>	<null>
MIDDLE_NAME	A	Andrew	<null>	<null>
RELIGIOUS_PREFERENCE	<null>	2400	<null>	<null>
TIME_STAMP	14-JAN-2004 14:04:40.0000	2-SEP-2004 9:08:30.0000	<null>	<null>

The illustration shows the results of a change made to the Pathway database. IB LogManager shows that user TAT changed the middle name, ethnic origin, and religious preference for consumer Edward Allen. This information could also be printed in a report or exported to another application.

Q & A

Answers to frequently asked questions and tips on how to get the most from your Vertex software.

Q What are default dimensions in Navision®?

A Default dimensions are restrictions that you can put on dimensions to require that a dimension value be added to the transaction (Code Mandatory), that a specific value be added to the transaction (Same Code), or that no value be added to the transaction (No Code). You can also suggest default dimension values for customers, vendors, employees, and account numbers. Depending on the dimension restrictions, the user may or may not be able to override the default.

For example, if a customer is normally invoiced to department 1 and department is a dimension, you can set a default of department 1 on the customer card. You can also require that any transaction that includes this customer have a value for the department dimension.

If you have advanced dimensions and if you want all transactions that use the table to either require a dimension value or not allow a dimension value, set the restrictions at the table level. If you do not have advanced dimensions, or if you want the transactions to use a specific dimension, set the restrictions at the card or account level. You should not set restrictions at both the table and card or account level. For example, do not set restrictions on the customer table and then on the customer cards. You could create conflicts. The only exceptions are that you can require a value (Code Mandatory) at the table level and then specify a value (Same Code) at the card or account level. This way, any transaction that is not required to use a specific value will still require the user to select a value.

In Navision 3.01.3, Vertex is introducing dimension restrictions by user, which restrict users from adding transactions for a dimension other than their own. For example, if you set dimension restriction by user on the branch dimension, users can be restricted to only adding transactions for their branch. Other users can be given access to add transactions for any branch.

For more information about adding default dimensions, or dimension restrictions, see the Microsoft® Business Solutions-Navision® Quick Task Guide, which is available on your Navision 3.01.3 Install CD.

Q Can you explain the Employee Productivity History report in ProductivityTrac?

A The Employee Productivity History report is one of the “backbone” reports of Pathway ProductivityTrac™. It shows hours, earnings, and productivity by employee for a specified period.

The Employee Productivity History report pulls information from labor history and groups history records by the primary grouping parameter (branch, department, etc.), then by employee, by pay code, and lastly by job/activity step. With its reporting options, you can report on any combination of employee, job/activity, and date range.

Parameter Options

There are four options available in the Parameter settings, Options tab:

Include Details: Select **Include Details** to create a detail report that shows the employees information by job step. Leave **Include Details** unchecked to create a summary report that shows the employee information summarized by pay type (piece rate jobs, hourly jobs, nonproductive time, programmed time, absent time).

Include Programmed Hours, Include Nonproductive Hours, Include Absent Hours: Select these options to include hours from any job/activity that uses a pay code with the selected calculation method (Programmed, Nonproductive or Absent).

Report Columns

The **Hours** column shows the number of hours the employee worked during the reported period. If time was entered as hours and minutes, the report converts it to decimal hours and shows the result to two places.

The **Pieces** column shows the number of pieces completed during the reported period.

The **Earnings per Piece** column shows the average earnings per piece completed for the reported period. It is calculated as:

$$\text{earnings per piece} = \text{earnings/pieces completed}$$

This number is rounded and displayed to the number of decimal places entered in the Piece Rate Precision setting in the Payroll System Options.

The **Earnings** column shows the total earnings for all built time records during the reported period.

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Report continued from page 4

The **Percent of Norm-Hours** column shows the number of hours included in the percent of norm calculation. For hourly jobs, the number of hours includes only those that were paid using the regular calculation method and that used the productivity rate to calculate earnings. Hourly jobs are only included in the report if the Include Hourly Pay in Productivity option is selected in the Payroll System Options.

The **Percent of Norm-Percentage** column shows the weighted average of the employee's productivity for jobs included in the Percent of Norm-Hours column.

The **Average Wage Rate-Hours** column shows the number of hours included in the average wage rate calculation for the reported period. Only job steps paid using eligible calculation methods are included in the number of hours. Eligible calculations methods are selected in the Earnings to Be Included in the Calculation of Average Hourly Rate table in the Payroll System Options.

The **Average Wage Rate-Earnings** column shows the total earnings for the hours included in the Average Wage Rate-Hours field.

The **Average Wage Rate-Avg Rate** column shows the average wage rate for the hours and earnings shown in the Average Wage Rate-Hours and Average Wage Rate-Earnings columns. The average wage rate is calculated as:

$$\text{average rate} = \frac{\text{average wage rate earnings}}{\text{average wage rate hours}}$$

Employee Subtotals

If the employee has earnings that are applied after the job/activity earnings have been calculated, these earnings are shown in the Employee Subtotals row. These earnings cannot be applied to a specific job/activity because they are paid against the total earnings.

The **Guaranteed Subsidy** line shows earnings that were paid because of guaranteed amount and guaranteed rate.

The **NISH Subsidy** line shows earnings that were paid because of NISH subsidy payments on NISH job/activity steps.

The **Premium** line shows earnings that were paid for holiday premium, overtime premium, or shift differential.

The **Advance/Repayment** line shows earnings paid or deductions taken as a result of advances or repayments.

Payroll System Options

The Payroll System Options section, at the end of the report, shows the settings and options used in the report.

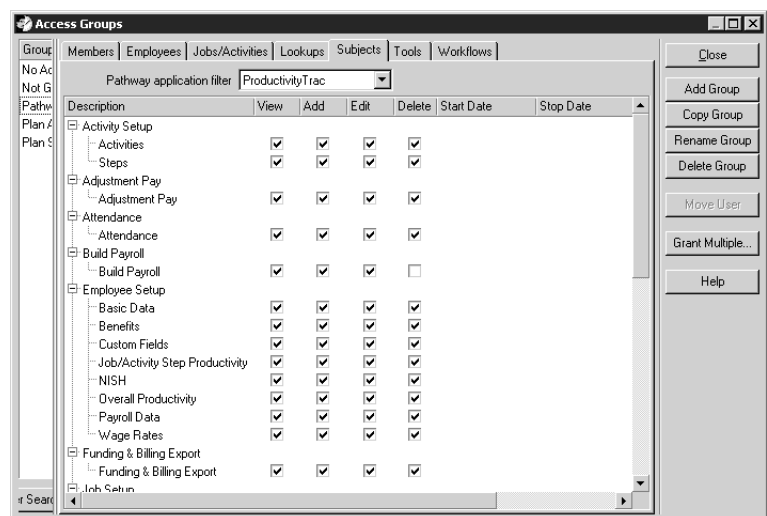
The **Hours** section shows whether hourly pay is included in the productivity rate and absent hours were included in the report. It also shows the piece rate precision used to calculate earnings per piece.

The **Rates** section shows the types of pay that were included when calculating Average Hourly Wage. The types are only marked when there were hours in the reported period for that type. If the type is marked with Yes, the time was included in the average rate calculation. If the type is marked with No, there was time in the reported period that could have been included in the average wage rate but the hours were not eligible to be included. (Eligible types are selected in the Earnings to Be Included in the Calculation of Average Hourly Rate table in the Payroll System Options.)

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ProductivityTrac™ or hide consumers in Pathway Case Management™.

In ProductivityTrac, you can grant users the right to add new employees, just as you can grant Case Management users the right to add new consumers. You can grant users access to all employees, employees in one or more payroll branches, or specific employees. You can also grant users access to all jobs and activities, job and activities in one or more payroll branch, or specific jobs and activities.



The illustration shows the window that grants access groups the right to view, add, edit, or delete information in subjects.

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First Class Mail

Spotlight continued from page 5

You can grant access for a limited time to any entity in the Access Management tool. If you have users who need temporary access, simply add a stop date so you do not have to remember to go back and remove the access when they no longer need it.

Automatic Log Off Extends Pathway Resources

The Automatic Log Off feature extends your user resources by not allowing a user who is not actively using a Pathway application to tie up a user session. The feature also enhances security by reducing the possibility that an unauthorized user could access a session on an unattended workstation.

The Automatic Log Off feature logs users off the Pathway application if there has been no activity for the specified time interval. When the user is logged off, the system displays a message telling them why their session was ended. The system will not end a session if there is unsaved data on the screen. In this case, the application window is hidden until the user enters their password. ✓

Summer Contest for \$50

Answer the questions listed below and you could win \$50 from Vertex. All answers can be found in this newsletter. Send the answers in an e-mail, along with your name and agency, to newsletter@vertexsoftware.com, or fax them to us at (614) 318-7145. All correct answers received by October 15, 2004 will be entered in a drawing for \$50.

- 1 How many TAC athletes participated in the Ohio Special Olympics?
- 2 Name four types of user access to subjects in Pathway applications.
- 3 Name two ways a labor distribution account can be mapped in the new Interface from ProductivityTrac to Navision.
- 4 How is employee information summarized in the summary version of the Employee Productivity History report? ✓

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