UnionVision

Software User Manual

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Welcome to UnionVision

Since 2000, Mustard Seed eCommerce, Inc. has provided Labour Organizations with advanced Technology Solutions – and UnionVision is better than ever.

SIMPLIFY YOUR BUSINESS PROCESSES

One way we make Trade Unions more productive is through streamlined business processes.

The latest version of our automation software brings unprecedented customization and integration features to our loyal customers.

Our focus remains on empowering our users through better technology without sacrificing ease of use.

UnionVision is a proven solution for simplifying and automating business processes unique to Trade Unions and other Membership and Labour Organizations.

Trust UnionVision to safely and efficiently manage your critical membership data.

ROBUST

Our robust software solution is both sophisticated and flexible. Features are fully customizable by your organization and even individual users!

INTEGRATION WITH OTHER POPULAR APPLICATIONS

UnionVision will even allow you to share your data with other Popular Applications such as Microsoft Office. Easily and quickly unlock unlimited potential for manipulating and managing your data by using automated export functions built-in.

LEVERAGE OUR INNOVATIONS TO YOUR ADVANTAGE

ADVANCED FEATURES!

- Member Tracking
- Employers, and Contractors
- Sister Locals
- Dues
- Collective Agreements
- Employment History
- Member Training
- Certification and Tickets
- Status History
- Financial Transactions
- Bank Deposit Slips
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- Payments
- Job Stabilization
- Out of Work List
- Job Dispatching
- Job Calls
- Travel Cards
- Arrears, Credits and Balances
- Beneficiary and Family names
- Photo Identification
- Contacts
- Telephone, Fax, Mobile
- Email addresses and Websites
- Apprentice Tracking
- Journeyman Status
- Hours Worked
- Hours Paid
- Extensive Reporting
- Report Manager
- Data Entry Wizards
- Data Grid Tools with complete sorting and column customization by user
- Export data to many formats including MS Word, MS Excel, Adobe PDF, Text
- Graphing and Charts
- Data Query Filters
- Advanced Search Algorithms for Quick Find of any record instantly
- Multi-User
- Customizable Solution

Installing UnionVision

SERVER SETUP

You will need to load the supplied UnionVision files on a Network Server.

This process only needs to be done once.

The Network Server should have a fast hard drive, and available space for the UnionVision database and setup files.

The UnionVision files must be stored in a Windows Folder accessible via fast network connection from all Client computers that will be running UnionVision.

Follow these Steps on your Server:

1. Create a Shared Network Folder named: **UnionVision**
2. Within the root of the UnionVision Folder, create two additional folders named: **PhotoID** and **Install**
3. Copy the Microsoft Access database file **UVData.mdb** to the root of the UnionVision folder.
4. Copy the **Two Setup Files** to the Install folder.
5. Ensure the Folder, File and User Security and access Permissions are set correctly for your Network Configuration.

LICENSE ACTIVATION KEY

You will need the Product Activation Key provided when you purchased, licensed, or requested an evaluation copy of UnionVision. This Product Key (CD Key) is an **Enterprise Wide Key** used to 'Brand' your copy of UnionVision for your Individual Organization. Do not lose this Key. It will be required each time you install UnionVision on a Client system within your Organization.

CLIENT SETUP

You will need to Install UnionVision on any Client Computers that will be connected to the UnionVision database.

CLIENT SYSTEM REQUIREMENTS

- ✓ Microsoft Windows XP or Microsoft Windows Vista O/S
- ✓ Microsoft Office 2003 or Microsoft Office 2007 required for data sharing and export integration features
- ✓ Minimum 512Mb RAM
- ✓ Minimum 100Mb Fast Ethernet connection to Network Server where database file resides
- ✓ Internet Access required

Follow these Steps on each Client:

1. Setup a **Mapped Network Drive** to connect to the Shared Network Folder **UnionVision** located on the Server.
2. Specify **Drive Letter U:** for the Mapped Network Drive. *(Mapping may be setup by your System Administrator using Active Directory Profiles and/or Login Scripts. It may also be setup manually on the Client via:* ***Explorer | Tools | Map Network Drive…*** *You must select the* ***Reconnect at logon*** *option)*
3. Browse to the **Install** folder located on Drive Letter **U:**
4. Run **Setup**.
5. Follow the instructions on the screen.
6. When requested, enter the **Product Key** assigned to your Enterprise.

Starting UnionVision

- Click **Start**, point to **Programs**, point to **Mustard Seed UnionVision**, then select **UnionVision**.

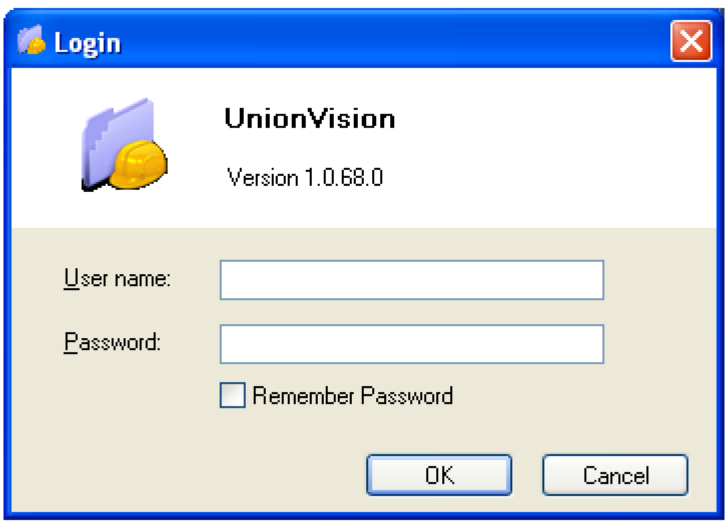
-or-

- Double-Click the **UnionVision** icon on the Windows desktop.

Getting Started

FIRST ADMINISTRATOR LOGIN

When you start UnionVision, the Login screen is displayed.



Your first Administrator login will use the built-in **Start-Up Account**.

- User name: **ABC**
- Password: **password**

Follow the instructions on the screen to update the password. UnionVision helps to protect your sensitive data by adhering to **Strong Password** conventions. Select a new password that adheres to the Strong Password conventions if prompted.

CONGRATULATIONS!
You are now logged-in to the UnionVision system as the Administrator.

Initial Configuration

VERY IMPORTANT ~ PLEASE READ CAREFULLY…

INITIAL CONFIGURATION PLANNING

Before entering your Membership data into UnionVision, some important Initial Configuration is required. This must be completed before other users begin to use the system.

Unexpected errors may occur if you begin entering Member or Employer data prior to Initial Configuration of UnionVision. Although you may be tempted to immediately begin entering your Membership and Contractor data, please review and follow the Initial Configuration Steps first!

These steps should be implemented by your UnionVision Administrator. Select an individual who has an extensive knowledge of the Business Logic and unique structure of your Business Cycle, Accounting and Membership Policies.

DYNAMIC SOLUTION
UnionVision is a dynamic solution that is exceptionally flexible and fully customizable. The dynamic nature of UnionVision requires careful and attentive planning before proceeding with data entry. Particular consideration must be given to the unique structure of your Membership including the different Trades, Apprentice levels, Dues Structure, Charge Types, Collective Agreements, Status groups, and accounting rules.

This initial configuration will help customize UnionVision for your unique requirements. Your solution will be different from any other Organizations using UnionVision. The careful planning you do now will ensure a fully customized solution designed for your exact needs.

FINE-TUNING ENCOURAGED
UnionVision is adaptable. You are encouraged to review and refine your initial setup configuration as your business logic evolves. Over time, you will find it helpful to fine-tune and adjust your configuration to handle new situations.

ARTIFICIAL INTELLIGENCE
UnionVision listens to you. UnionVision constantly monitors every keystroke during all user sessions. This data is compiled and programmatically analyzed to detect data patterns and build real-time data models. From these sophisticated models, templates are developed, and they are continually updated to mirror your data entry trends. As data patterns emerge, UnionVision adapts to become more intuitive and even begins to anticipate your data entry values.

Many data fields will be automatically pre-populated with default values based on recognized patterns. This saves time, and increases accuracy. In addition, extensive data validations and logic algorithms will continually monitor your data entry to help ensure typos and accidental mistakes are minimized. The more you use UnionVision, the more it adapts to your preferences.

Your initial configuration values will help UnionVision to begin to understand your unique requirements.

Initial Configuration Steps

ADMINISTRATOR CHECKLIST ~ **FOLLOW EACH STEP IN ORDER** *

**** Some steps are dependent upon completion of previous steps***

The selected Administrator must initially configure UnionVision. This helps UnionVision to create the best system architecture to fit your Business Model.

Administrator Guide: Initial Configuration Checklist

Task	Yes	Menu	Comments, Tips, and examples
Select your UnionVision Administrator	☐	n.a	▪ Familiar with Business Logic, Accounting Policies, Membership Groups, Collective Agreements, Dues Structure, etc. ▪ Responsible for defining database design relationships, implementation and training on system **Administrator**: ______________________________
Confirm UnionVision Key for License Activation.	☐	n.a	▪ Enterprise wide Key ▪ Will be used on every client computer when installing UnionVision software ▪ Brands software during installation with Identification details for your Organization ▪ Branding Identification will be used on all Reports and throughout entire system **License Key**: ______________________________
Update Administrator Start-Up Account (Demo User) with Initials, Name, and email of your UnionVision Administrator.	☐	Admin Users	▪ Replace ABC initials with actual ▪ Update Name and other details ▪ Ensure Administrator option is always selected for this account, or you will inadvertently lock yourself out of Admin functions
Add additional users to system.	☐	Admin Users	▪ Initial value for login will be user Initials and default Password: 'password' ▪ Users will be prompted to update their default 'password' on their first login ▪ CAUTION: User Accounts with 'Administrator' privileges are granted full-control over all modules and users within the system ▪ Assign 'Administrator' privileges sparingly! Limit the number of Administrator Accounts on your system to protect your data
Assign User Permissions to enable access to Reports, Modules and Tasks within system by Individual User.	☐	Admin User Permissions	▪ Administrator Accounts have full-control to enable and/or restrict individual User access to any Report, Module or Task ▪ The User Permissions Matrix allows the Administrator to fully customize all User Accounts to establish unique permissions by individual User ▪ Grant User Permissions as each individual User requires ▪ It is suggested the User Permission Matrix be reviewed on a regular basis to ensure proper User Permissions are maintained for all Users in the system

Add Payment Types.	☐	Admin Payment Types	▪ Enter various Payment Types expected from Members, Employers or Sister Locals ▪ e.g. Cash, Cheque, Money Order, Mastercard, Visa, Debit, etc.
Set default Payment Type for receipt of monies from Members, Employers, and Sister Locals.	☐	Admin Payment Types	▪ Default will be used to speed up data entry by pre-selecting most common payment method when entering payments received
Add Miscellaneous Fees applicable to Members.	☐	Admin Miscellaneous Fees	▪ Used for entering charges on Member accounts ▪ Default Charge Amount will be used, but over-rides are allowed when charges are applied to member accounts ▪ Do <u>not</u> include Dues ▪ Dues will be handled separately ▪ e.g. Initiation Fee, Withdrawal Fee, Reinstatement Fee, NSF S/C Fee, Late Payment Fee, Local Assessment, etc.
Add Miscellaneous Fees applicable to Employers.	☐	Admin Miscellaneous Fees	▪ Used for entering charges on Employer (Contractor) accounts ▪ Default Charge Amount will be used, but over-rides are allowed when charges are applied to employer accounts ▪ Do <u>not</u> include monthly remittance rates related to collective agreements ▪ Rates will be handled separately ▪ e.g. Late Filing Fee, NSF S/C Fee, etc.
Add Miscellaneous Fees applicable to Sister Locals.	☐	Admin Miscellaneous Fees	▪ Used for entering charges on Sister Local accounts ▪ Default Charge Amount will be used, but over-rides are allowed when charges are applied to Sister Local accounts ▪ Do <u>not</u> include monthly remittance rates related to Travel Card dues or reciprocal rates under collective agreements ▪ Rates will be handled separately ▪ e.g. Late Filing Fee, NSF S/C Fee, etc.
Update data on General Tab for your own Sister Local.	☐	Locals View Sister Locals Find own Local on data grid Double-Click	▪ Data entered for your Sister Local will be used as master identification details for all reports generated by UnionVision ▪ Include your complete address details ▪ Enter multiple telephone numbers (i.e. Primary, and Fax) ▪ Enter your primary email address and website ▪ Enter multiple contacts for your Sister Local ▪ Include direct tel. & email for each contact ▪ e.g. Business Manager, Business Agent, etc.
Upload your Union and Sister Local Logo images for customization of Reports.	☐	Reports Logos	▪ Logos uploaded will be used to customize all Reports generated by UnionVision ▪ Include Logo for Union ▪ Include Logo for your Sister Local ▪ Logos will automatically be re-sized, but try to use similar aspect ratio ▪ Do not use Logos with Transparent backgrounds, as these will be displayed with black background on reports

Upload Signature Scan for automatic printing of authorized signature on Financial Reports.	☐	Reports Logos	▪ Some Financial Reports such as Tax Receipts will require an Authorized Signature ▪ Upload a scan of the Business Manager's signature ▪ This will automatically be printed on Reports and forms requiring an Authorized Signature
Add Employer Status Types.	☐	Admin Status Types Employer Status Types	▪ Status Types allow you to classify Employers (Contractors) based on overall groupings ▪ Each Employer will be assigned a Current Status, and also Historical Status settings ▪ The 'Active' Check Box controls the master setting for all Employers belonging to the Status Type ▪ e.g. Active, Bankrupt, Closed, Non-Union, Terminated, etc.
Set Default Employer Status Type.	☐	Admin Status Types Employer Status Types	▪ Default Status Type will be automatically selected when entering New Employers in system ▪ Speeds up data entry when adding new Employers ▪ e.g. 'Active' will likely be default Status
Add Member Status Types.	☐	Admin Status Types Member Status Types	▪ Status Types allow you to classify Members based on overall groupings ▪ Each Member will be assigned a Current Status, and also Historical Status settings ▪ The 'Active' Check Box controls the master setting for all Members belonging to the Status Type ▪ Status Types without the 'Active' check box selected will be considered In-Active by the system, and Dues will not apply (e.g. Deceased) ▪ The 'Eligible for Out of Work List' Check Box controls the master setting for all Members belonging to the Status Type ▪ e.g. Active, Retired, Deceased, Probation, Student, Withdrawal, Expelled, etc.
Set Default Member Status Type.	☐	Admin Status Types Member Status Types	▪ Default Status Type will be automatically selected when entering New Members in system ▪ Speeds up data entry when adding new Members ▪ e.g. 'Active' will likely be default Status

Add Trades and Apprentice Levels.	☐	Admin Trades and Apprentice Types	▪ Specify major Trades covered by your Local ▪ Members will belong to a specific Trade group ▪ Within each Trade, specify Apprentice and Journeyman Levels ▪ Trades and associated Apprentice Levels will be referenced by Trade/Apprentice Codes you assign ▪ For each Apprentice designation, you may specify number of Hours needed to successfully complete the level ▪ Specify progression order for Apprentice Levels by moving individual rows up or down in ascending list arrangement ▪ Dues Structure will later be derived from your Trade Apprentice Levels created ▪ Trade Examples: o PLB ~ Plumber o SF ~ Steamfitter o WLD ~ Welder ▪ Apprentice Examples: o PLB1 ~ Plumber Apprentice Level 1 o PLB2 ~ Plumber Apprentice Level 2 o PLB3 ~ Plumber Apprentice Level 3 o PLB4 ~ Plumber Apprentice Level 4 o PLB5 ~ Plumber Apprentice Level 5 o PLBJ ~ Plumber Journeyman
Set Default Trade.	☐	Admin Trades and Apprentice Types	▪ Default Trade will be automatically selected when entering New Members in system ▪ Speeds up data entry when adding new Members
Setup Dues Rate Structure for Current Calendar Year.	☐	Admin Dues Structure	▪ Dues Rate Structure allows you to define Member Dues by Trade, Apprentice Level, and Member Status Type ▪ If it is late in the calendar year, it might be best to delay setup of Dues Structure until the beginning of the next calendar year. This will provide a cleaner cut-over date based on the first of the New Year ▪ Dues Structure for previous years are not required as Opening Balance amounts will be setup for members with Dues arrears related to previous years ▪ Enter Annual Prepayment Discount if applicable ▪ Enter Monthly Dues Amount for each Trade Apprentice Level setup in the system ▪ Review Mandatory Overrides based on In-Active Member Status Types (i.e. No Dues apply to Deceased Members) ▪ Add any Optional Overrides based on Member Status Types (i.e. Golden Members may have zero dues for lifetime service recognition)

Choose an Accounting Start Date for Financial Tracking.	☐	n.a.	▪ A clean cut-over date is required for proper Accounting ▪ Select an Accounting Start Date appropriate for your organization ▪ Using the first of the Calendar Year of the initial Dues Rate Structure (previous step) is an excellent choice ▪ The first of your Fiscal year may also be used, but consideration must then be given to pro-rating Dues Transactions covering any partial years ▪ Members and Employers with Current Balances as of your chosen Accounting Start Date may be easily tracked using Opening Balance amounts as of the Start Date ▪ i.e. All Members with Dues Arrears as of your Account Start Date will be setup with Opening Balance Amounts to reflect their arrears **Accounting Start Date**: ______________________
Completed by:________________________________ Date: ______________________			

CONGRATULATIONS!
With Your Initial Configuration Steps complete, UnionVision is now ready to begin tracking your Membership and other critical data.

THERE'S MORE ~ ***WHEN YOU'RE READY…***
There are some more advanced features waiting for you when you're ready!

Once you have a thorough understanding of the initial data entry functions, you will want to browse some of the more Advanced Setup Options. These will enable you to begin using other built-in modules with many additional features to supplement the core program areas. Refer to the ***Advanced Setup Options*** when you're ready…

Advanced Setup Options

ADMINISTRATOR CHECKLIST

UNLOCK THE POWER OF EXTRA FEATURES
After completing the Initial Configuration Steps, and familiarizing yourself with the core program areas, you will be prepared to enable some of the more Advanced Modules within UnionVision.

Administrator Guide: Advanced Setup Options				
Module	**Task**	**Yes**	**Menu**	**Comments, Tips, and examples**
Member Training, Certification & Tickets	Add Training Courses and Certifications available to Members.	☐	Admin Training Courses and Tickets	■ Courses allow you to track Member Training ■ Courses may be designated as 'Certificates' or 'Tickets' if a license or permit is issued for the accomplishment of the Course ■ Specify the Hours related to the Training ■ Indicate if the Training Hours should apply to the Member Trade School Classroom Hours ■ Member Course requirements will later be used to filter and select potential members on the Out of Work List based on Training requirements for specific Job Dispatches ■ Use a Course 'Code' that will help you identify the Courses quickly ■ e.g. GAS1 ~ Gas License Level 1, GAS2 ~ Gas License Level 2, CPR ~ First Aid with CPR, etc.
Collective Agreements	Setup Collective Agreements for each Sector and period.	☐	Admin Agreements and Rates	■ Collective Agreements outline the Rate Structure for each Sector and period ■ Collective Agreement Rates are used to create templates or profiles to be used when entering Monthly Remittances from Contractors ■ Rates are amounts Deducted per hour under Collective Agreement ■ Do not enter hourly wages for members, but only create rates for hourly deductions that need to be tracked for monthly Employer Reporting ■ Add Collective Agreements for each Sector ■ Add Collective Agreements for each specific agreement period ■ Enter rates for each Collective Agreement ■ Various Rate Codes and Rate Amounts may be tracked for each Agreement ■ e.g. ICI Sector: CFD ~ Contingency Field Dues, SFD ~ Supplementary Field Dues, etc.

Job Stabilization	Setup Apprentice Rate Factors for Stabs Hourly Rates.	☐	Admin Stabs Apprentice Rate Factors	■ Stabs Jobs are paid based on an Approved Hourly Rate for a Journeyman Status ■ Apprentice Levels are paid at lower rates, and therefore the Stabs Payments to Contractors are reduced for Non-Journeyman hours ■ Rate Factors are entered to determine the default percentage of the Journeyman Hourly Rate to be paid on Approved Stabs Hours for Non-Journeyman Hours ■ These will be used to calculate the default rates when making Stabs payments. However, individual over-ride rates will be allowed if required when processing Stabs Payments ■ Only enter rates that need adjustment (i.e. if same Hourly Rate, do not enter the adjustment factor) ■ e.g. Apprentice Level 1 = 40%, Apprentice Level 2 = 50%, Apprentice Level 3 = 60%, Apprentice Level 4 = 70%, Apprentice Level 5 = 80%, etc.
Job Stabilization	Setup Requirement Item Types for Stabs Job Processing.	☐	Admin Stabs Requirement Item Types	■ Requirement Item Types allow you to create a Checklist of Required Items for processing of a Stabs Job ■ Required Items will be mandatory before Stabs payments are processed to ensure all required items selected have been fulfilled ■ This is master list of potential Required Items for Stabs Jobs ■ For each Stabs Job, you may select any combination of Required Items from the master list ■ e.g. Signed Contract, P.O. Received, etc.
Out of Work List	Setup Out of Work Lists.	☐	Admin Out of Work Lists	■ Create separate Out of Work Lists ■ When members are added to an Out of Work List, you may select the specific Out of Work List they should belong to ■ Use major groupings to allow you to manage members by Trade or classification ■ e.g. Plumbers, Steamfitters, Welders, etc.
Out of Work List	Add Out of Work List Current Status Designations.	☐	Admin Status Types Out of Work List Status Types	■ Out of Work List Status Designations allow you to track current availability of each member on the Out of Work List ■ Members on the Out of Work List may be set to one of these Status Designations ■ Allows you to filter and manage members on the Out of Work List ■ e.g. Available, Working, Unavailable, Travel, etc.
Out of Work List	Set Default Out of Work List Status Designation.	☐	Admin Status Types Out of Work List Status Types	■ Default Status Type will be automatically selected when adding Members to the Out of Work List ■ Speeds up data entry when adding members to Out of Work List ■ e.g. 'Available' will likely be default Status

Out of Work List	Add Job Call Notify Status Types.	☐	Admin Status Types Job Call Notify Status Types	▪ Job Call Notify Status Types allow you to track possible outcomes of offering a Job Dispatch to a Member ▪ Result of Job being offered will be classified by these Job Call Notify Status Types ▪ Allows you to track member's response to all Job Calls ▪ Indicate if Response Type results in Member being Dispatched (i.e. Member Accepts Job Offering) ▪ e.g. Accepted Job, No Answer, Left Message, Emailed Member, Will Advise, Declined, etc.
Out of Work List	Set Default Job Call Notify Status Type.	☐	Admin Status Types Job Call Notify Status Types	▪ Default Job Call Notify Status Type will be automatically selected when logging a Call to Member ▪ Speeds up data entry when logging Job Calls to members on the Out of Work List ▪ e.g. 'Accepted Job' will likely be default Job Call Notify Status
Completed by:________________________________			**Date: _______________________**	

Best Practices

BUILT-IN DATA RELATIONSHIPS

The information stored and managed by UnionVision is ‘strongly typed’ data with a well defined structure. Critical data relationships exist to ensure data stored within individual modules of UnionVision is constantly accessible by other related modules.

As you enter or update your data in one area, the changes will instantly *cascade* through to all associated areas. Your data is automatically linked across the broad scope of modules within UnionVision.

This means you change data once, and in only one location.

This relational architecture provides a vast warehouse of storage space with almost instantaneous data retrieval mechanisms.

DATA ENTRY ~ WHERE TO START?
It’s time to start entering your data. Where do you start?

A specific order is suggested when you begin Historical Data Entry…

Due to the interconnected design nature of data relationships, some information relies on other primary data being available first.

(For instance, Members working for an Employer will naturally require the Employer information to exist before the Member may be associated with the Employer)

To help ensure an interrupted flow in your historical data entry, it’s best to enter your data in the overall order outlined here.

HISTORICAL DATA ENTRY ~ SUGGESTED ORDER:

Follow this Data Entry Order when you first begin entering your Historical data:

1. Sister Locals
2. Employers
3. Members

USE A TASK ORIENTED PROCESS!

- ✓ Enter general, identification information first, and then save record
- ✓ After creating many records, go back and begin entering more specific historical information for each record
- ✓ Enter historical information using a planned Task Oriented process i.e.
    - after entering general identification details for many member records, go back and enter more detailed information for each Member
    - Training History for many members could be compiled, and then entered for each member as a separate task oriented process
    - Repeat process for Member Status History
    - Repeat process for Employment History, etc.

SAVE TIME…
Instead of entering all detailed information for an individual member at one time, plan a Task Oriented Process for your historical data entry. It’s Faster!

Training

USER TRAINING IS KEY TO SUCCESSFUL DEPLOYMENT
Users already comfortable with Microsoft Office, will quickly appreciate the familiar look and feel of UnionVision.

UnionVision relies on proven design layouts that are common to all modules. Once users are comfortable with one task, they will adapt quickly to learning other tasks because of the consistent interface used throughout all modules.

DATA GRIDS ~ POWERFUL, FLEXIBLE, AND CUSTOMIZABLE
Data grids are used extensively throughout UnionVision to leverage the power of your data. As users become more familiar with the basic concept and navigation of data grids, they will quickly become skilled at many tasks.

Power Users will rapidly discover the flexibility and customization of data grids and quickly master many of the more advanced features.

SETUP A TRAINING ENVIRONMENT
Make a copy of your 'LIVE' UnionVision database, and setup a Training Environment.

Have your **Administrator** setup a **Training Workstation** that is 'MAPPED' to the Training Copy of your database, instead of the 'LIVE' or master database.

CAUTION: *Never train users when connected to your LIVE database. Always make certain the workstation being used is connected to your TRAINING COPY of the database.*

A Training Workstation allows users to learn and practice all the necessary data entry processes. Using your TRAINING Workstation, encourage each user to:

- Login to UnionVision
- Become Familiar with basic Navigation
- Enter data
- Update data
- Delete data
- Find records
- Customize data grid layout
- Post Transactions
- Generate Reports
- Export data
- Logout

CONCENTRATE ON BASIC TASKS FIRST!
Navigation, data lookup, and basic data entry may be learned quite quickly. Once the user is comfortable with these elementary tasks, they will be less intimidated and eager to learn more.

Take it slow, and concentrate on the easier tasks first. Don't overwhelm new users with advanced features too early. A good understanding of the Core components will make a strong foundation for great learning.

Protect Your Data

YOUR DATA IS CRITICAL

Do not risk your essential business information.

Setup and maintain Data Backup Strategies and proper Security!

Your Administrator must review, establish and maintain ongoing data protection strategies.

The **UnionVision** folder on your Network Server contains sensitive images and data used by UnionVision.

The **PhotoID** folder and the **UVData.mdb** file stored within the UnionVision folder are particularly important.

These files must be secure from unauthorized browsing, tampering, access, copying or download. In addition, regularly scheduled backup routines must make safe and secure copies of these files.

USER PERMISSIONS MATRIX
Your Administrator must establish and regularly review all User Permissions.

The 'User Permissions Matrix' allows the Administrator to customize and regulate all User Permissions. You may restrict and/or authorize access to any Report, Module or Task within the system.

Consider the department and seniority of each individual user. Temporary, Part-Time, and entry-level workers should not be granted access to your critical data.

SAFEGUARD YOUR DATA!

Your Administrator will need to implement proper procedures based on your network and computer environment.

However, the following **Basic Tips** should be considered as an initial guideline for developing your overall data protection strategy.

BASIC TIPS

The following basic guidelines should be considered to help safeguard your data:

- Review and monitor all User Permissions. Immediately remove permissions no longer required by a User
- Assign an individual who will be responsible for maintaining and monitoring your backups
- Schedule regular backup of files *(i.e. Daily)*
- Do NOT backup or copy files when users are possibly in UnionVision *(i.e. schedule backups for after-hours when no users are logged in)*
- Use Generational Backups *(i.e. do not over-write the same backup files each night. Maintain separate files for different days)*
- Maintain at least three copies of the data, and keep at least one copy off-site in a properly controlled environment
- Backup files prior to any major changes to data *(i.e. Backup before any closing or complex automated routines are run)*
- Backup both the 'LIVE' and the 'TRAINING' data environments *(Obviously, the 'LIVE' data environment files are most critical)*
- Develop conventions for names and dates of backups
- Maintain manual records of transactions between backups to allow for re-entry of data if you must revert to a previous backup
- Secure both the main storage data and all backup media
- Store all backup media in safe, locked, protected environment
- Monitor backup logs and user activity
- Consider using encryption for backup media
- Prepare a plan to recover or restore your data in the event of a failure

Keyboard Shortcuts

FASTER NAVIGATION
Keyboard Shortcuts can make it easier to interact, and navigate within UnionVision.

Advanced users realize the power of Keyboard Shortcuts. These handy tools will help you accomplish much more in much less time.

AT YOUR FINGERTIPS
You don't need to use the mouse as often, and you will find your data is literally at your Fingertips! Repetitive tasks are much faster and easier.

Jump directly to the exact screen or record you need. These essential helpers will make regular tasks faster with remarkable results.

NAVIGATION COMMANDS
Members View.......................... **CTRL+M**
Employers View......................... **CTRL+E**
Sister Locals View..................... **CTRL+L**

DATA GRID COMMANDS
Refresh Data Grid.............................. **F5**
New Record.............................. **CTRL+N**
Delete Record........................... **CTRL+D**
Export to Excel.............. **CTRL+SHIFT+E**

DUES COMMANDS
Dues Wizard............................ **CTRL+W**

JOB STABILIZATION COMMANDS
Launch Job Stabilization............ **CTRL+J**
Go to Stabs Job........................ **CTRL+G**

OUT OF WORK LIST COMMANDS
Launch Out of Work List........... **CTRL+O**
Go to Job................................. **CTRL+G**
Delete Wizard........................... **CTRL+W**

MENU ITEM COMMANDS
Control Menus via Keyboard............ **ALT**
Menu Item......... **ALT+Underlined Letter**

EDIT COMMANDS
Find.. **CTRL+F**
Print.. **CTRL+P**
Save Record.............................. **CTRL+S**
Delete Record........................... **CTRL+D**
Insert.. **INS**
Delete... **DEL**

NOTES/TEXT COMMANDS
Copy... **CTRL+C**
Cut.. **CTRL+X**
Paste.. **CTRL+V**
Select All.................................. **CTRL+A**

PROGRAM COMMANDS
Close Current Form (Exit).......... **ALT+F4**
Escape (Cancel).............................. **ESC**
Help (About).. **F1**

AUTODIALER COMMANDS
Call using AutoDialer.... **CTRL+SHIFT+D**

PREFERENCES COMMANDS
Preview Pane............................ **ALT+F1**

TIP! ~ CONTACT SENSITIVE CONTEXT MENUS
In addition to the many Keyboard Shortcuts, the advanced user will benefit from extensive Context Menus built into UnionVision. These dynamic helper menus are contact sensitive, and will be generated based on the underlying data when the menu is invoked. Simply use your mouse to RIGHT-CLICK on any object to invoke these indispensable time-savers!

Product Support Services

Technical Support for this product is available directly from the Software Manufacturer:

Mustard Seed eCommerce, Inc.
19 Torrance Woods, Brampton, ON
Canada, L6Y 2T1

Lead Developer: Geoff McKay
Email: support@ms.ca
Website: www.MS.ca

PHONE SUPPORT
Tel. (905) 459-0800 x322
Toll Free: 1.877.www.MS.ca
Fax (905) 459-9300

CONDITIONS:
Mustard Seed support services are subject to then-current prices, terms, and conditions, which are subject to change without notice.

ADDITIONAL DOCUMENTATION

Using Windows Explorer on your computer, **Browse** to **Program Files**, then browse to the folder **Mustard Seed eCommerce**, then browse to the folder **UnionVision**, and open the folder **Support**.

The **Support** Folder contains the following additional documentation:

- Credits
- EULA *(End User License Agreement)*
- Manual
- Readme
- Warranty
- Shortcut to MS.ca website

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