SAFR - Scalable Architecture for Financial Reporting
PDF from SAFR Information Center 4.15.00

IBM

Administrators Guide
SAFR Workbench 4.15.000

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Note

Before using this information and the product it supports, read the information in "Appendix: Notices" on page 103.

Fourth Edition

This edition applies to version 4, release 15, modification 000 of SAFR Workbench (part of SAFR product number 6949-17P) and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. Basics of using the SAFR Workbench

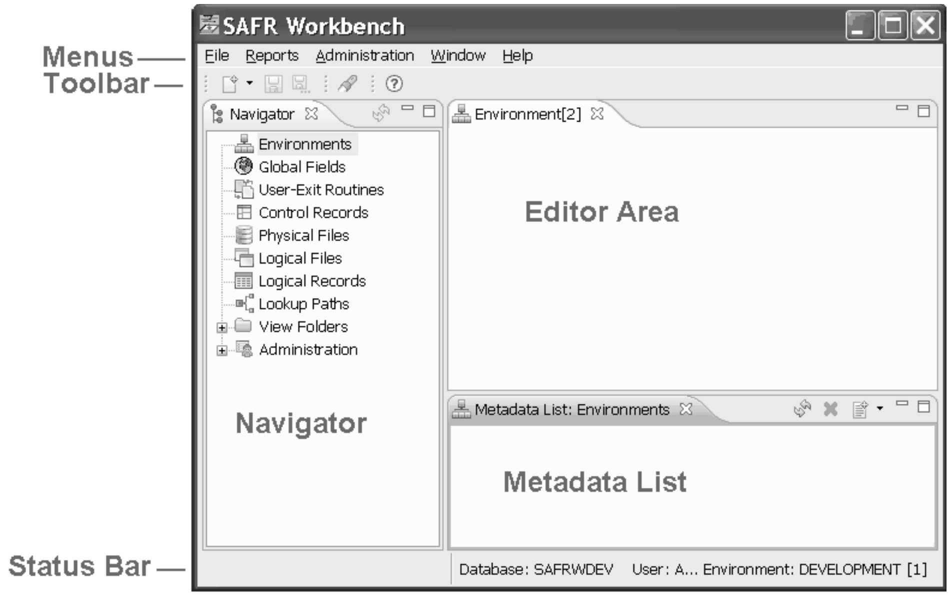
01 Summary of this topic

This topic covers the following:

02 What does the SAFR Workbench do?

This is covered in topic "**Workbench overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

03 Structure of the screens in the Workbench



04 How to do most work in the Workbench

See headings **Menus** and **Toolbars** below for a complete list of the tasks that can be performed in the workbench.

Most work is modifying some existing metadata item, as follows:

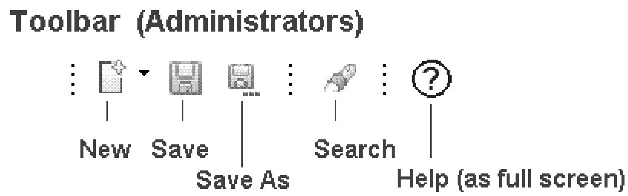
1. Click on a **node in the Navigator.** The Metadata List displays a table of items.
2. Double click on an **item in the Metadata List**. An edit screen opens in the Editor Area.
3. Add or modify information in the **screen in the Editor Area**. In most cases work in the edit screen ends by clicking  (the save icon). Other ways to save are to select **File -> Save** or click Ctrl+S. There may be other ways work in the edit screen ends. When the work in the edit screen is complete, close that screen by clicking on X in the tab similar to:

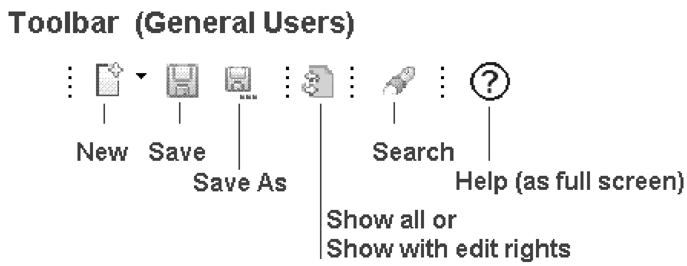
   

4. **If you do not save** before closing a screen (or before closing the workbench) a screen displays called **Save Changes?** Choose from **Yes** (save), **No** (no save) and **Cancel** (do not close).

WARNING: it is possible to launch two screens in the Editor Area that are changing the same metadata item. This is not recommended and may result in loss of changes from one of the screens.

05 Toolbars





Both system administrators and environment administrators see "Toolbar (Administrators)" above.

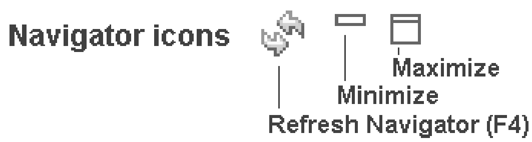
Button	Notes
New (Ctrl + N)	If you clicked this item in the **Administration** or **Components** menu, a further sub-menu appears with all the metadata item types. A grey item means you do not have rights to create that type of item. Click a non-grey item type to launch a create of a new item. If you clicked **Ctrl + N**, then you are attempting to create an item where the type is the currently highlighted node in the Navigator. If the Navigator has a view folder highlighted, then Ctrl + N creates a new view. If the Navigator is not visible, then this combination of keys has no effect.
Save (Ctrl + S)	Saves the active edit screen. Saves all tabs of that screen.
Save As (Ctrl + Shift + S)	Copies a metadata item in the active editor screen and saves with a new name. For more details, see task "**Copying metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Show all or Show with edit rights	Changes the display of lists of metadata for general users. Click this button again to switch choices between "**Show all**" and "**Show with edit rights**". For more details of this, see topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Search (F3)	This menu item allows searching of a list of metadata items. You must have first clicked in a list of metadata that can be searched. The Metadata List can be searched, as can many lists of metadata in Editor screens. For more details, see task "**Searching lists of metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Button	Notes
Help	Opens the workbench help system as a full screen.

06 Navigator

If the Navigator is not visible, click **Window -> Show -> Navigator**.

The Navigator lists the types of metadata as nodes in a tree structure. The **Administration** node is only displayed for a system administrator. The nodes "**View Folder**" and "**Administration**" have a plus + sign. Click on the plus + sign to expand the node and show items underneath. Click on any node or an expanded item to display the Metadata List for that node or item.

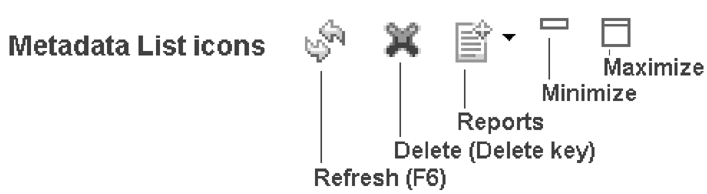


Button	Notes
Refresh Navigator (F4)	The Refresh Navigator icon  is used to ensure the View Folder list in the Navigator contains current data. If this icon is grey, dick on the "**View Folders**" node in the Navigator to activate this icon. When active, click on this icon or press F4 to refresh the Navigator with current view folder data. Alternatively, double click on "**View Folders**" to refresh the Navigator in one action.
Minimize	The Navigator is replaced by a restore icon  that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the Navigator visible as before.
Maximize	Make the Navigator as large as possible. Click on the restore icon  to make the Navigator visible as before.

07 Metadata List

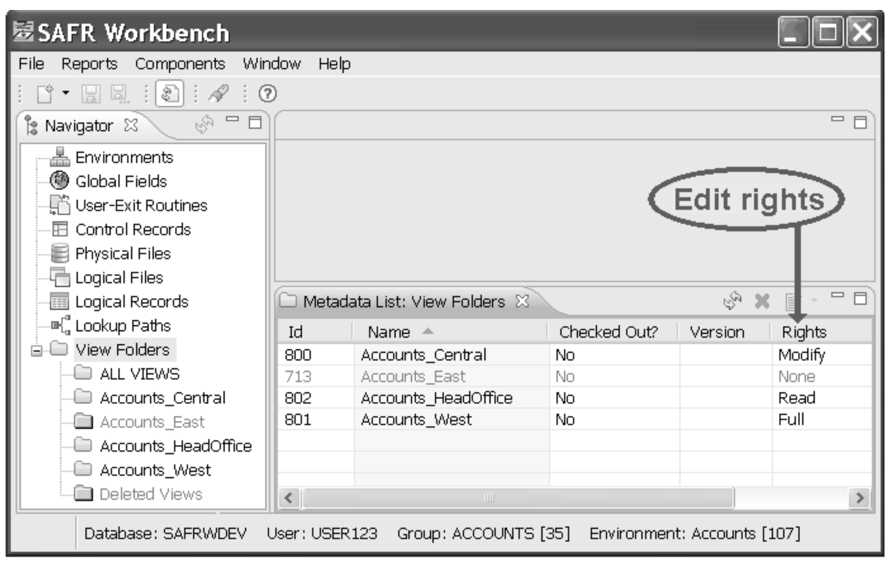
If the Metadata List is not visible, click on an item in the Navigator. Alternatively, click **Window -> Show -> Metadata List**.

The Metadata List displays a list of all examples of the node or item that was clicked in the Navigator. Double click on any line in the list to display an edit screen in the Editor Area.



Button	Notes
Refresh (F6)	Refresh the Metadata List with current data.
Delete (Delete key)	Delete the currently selected item in the Metadata List. For more details, see task "**Deleting metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Reports	An item must be selected in the Metadata List first. Click the down arrow to see a list of the possible reports for the item. If there is no selected item, or that item has no possible reports, then this icon has no effect. For more details, see task "**Generating reports on metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Minimize	The Metadata List is replaced by a restore icon that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the Metadata List visible as before.
Maximize	Make the Metadata List as large as possible. Click on the restore icon to make the Metadata List visible as before.

One of the most important parts of the Metadata List is the column "**Rights**". These refer to edit rights to a particular item of metadata. For example, if you click on "**View Folders**" in the **Navigator**, the Metadata List may appear as follows:



For more on edit rights and security, see topic "**WE Security overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

08 Editor Area

To modify an existing item, double click on an item in the Metadata List to display an edit screen.

To create a new item, click the **arrow beside**  (the new icon on the Toolbar).

Alternatively, to create a new item a system administrator or environment administrator can click **Administration -> New** and select an item. System administrators can create all item types. Environment administrators (in the appropriate environment) can create all types of metadata except environments, users and groups.

Alternatively, to create a new item a general user can click **Components -> New** and select an item. General users have limited rights in creating items, based on the group selected during login.

09 Other screens

There are many more screens than mentioned above. Open some of these screens by clicking **Window -> Show** and choosing a screen type. Some screens can only be reached by clicking on specific buttons on specific screens in the appropriate situations.

10 Keyboard Shortcuts - complete list

See topic "**What are the keyboard shortcuts?**" That topic is elsewhere in this PDF - see the table of contents.

11 How do I find help inside the workbench?

See topic "**Finding screen help**". That topic is elsewhere in this PDF - see the table of contents.

12 Menus

Below is a table of menus available in the SAFR Workbench.

The **Administration** and **Components** menus are the same menu. System administrators and environment administrators see menu "**Administration**". General users see menu "**Components**".

System administrators always have rights to all Administration menu items.

Environment administrators are missing some rights, so some items are grey on the Administration menu.

General users only have rights to the **Components** menu as given by the group selected during login. If a menu item is grey then the login group does not provide rights to that item.

Items on the **Reports** menu are **grey** until an appropriate metadata example is highlighted in the Metadata List or a particular metadata item has an active edit screen. All users of the workbench can potentially access all items on the Reports menu, unless a general user does not have read edit rights to a particular metadata item.

Menu	Option	Notes

Menu	Option	Notes
File	Return to login... (Ctrl-L)	Return to the SAFR Login screen to login a different way than currently. For more details, see task "**Return to login**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Search (F3)	This menu item allows searching of a list of metadata items. You must have first clicked in a list of metadata that can be searched. The Metadata List can be searched, as can many lists of metadata in Editor screens. For more details, see task "**Searching lists of metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Open View (Ctrl+O)	The **Open View** screen appears. Type a view id number and press OK to open that view.
	Save (Ctrl+S).	Saves the changes on the active edit screen.
	Save As (Ctrl + Shift + S)	Copies a metadata item in the active editor screen and saves with a new name. For more details, see task "**Copying metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Recent Views	Displays a list of the last five recently opened views. Click on an item to open that view.
	Open Log File	Select a log file from a list. The selected file displays in Notepad. For more details, see topic "**WE log file overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Change Log Path	The **Browse For Folder** screen appears. For more details, see topic "**Change Log path screen help**". A link to that topic is under **Related reference** below.
	Update User Profile.	Opens a screen to allow the user to edit their own user record. For more details, see task "**Modifying own user account**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Exit	Exits the entire workbench.
Edit		This menu appears on some screens. See the relevant screen help topic for details.
Action		This menu appears on some screens. See the relevant screen help topic for details.
Reports	Environment Security Report	A further sub-menu appears that allows a choice of "**by Id**" and "**by Name**". This selects the order of the groups listed in this report.
	Logical Record Report	Creates a Logical Record Report. For more details, see topic "**How do I generate a Logical Record Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Menu	Option	Notes
	Lookup Path Report	Creates a Lookup Path Report. For more details, see topic "**How do I generate a Lookup Path Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Properties Report	Creates a View Properties Report. For more details, see topic "**How do I generate a View Properties Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Column Report	Creates a View Column Report. For more details, see topic "**How do I generate a View Column Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Column PIC Report	Creates a View Column PIC Report. For more details, see topic "**How do I generate a View Column PIC Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Dependency Checker	Opens the Dependency Checker screen that allows checking all dependencies for a particular metadata item. For more details, see topic "**How do I generate a Dependency Checker Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Administration or Components	New (Ctrl + N)	If you clicked this item in the **Administration** or **Components** menu, a further sub-menu appears with all the metadata item types. A grey item means you do not have rights to create the type of item. Click a non-grey item type to launch a create of a new item. If you clicked **Ctrl + N**, then you are attempting to create an item where the type is the currently highlighted node in the Navigator. If the Navigator has a view folder highlighted, then Ctrl + N creates a new view. If you clicked Ctrl + N and the Navigator is not visible, then this combination of keys has no effect.

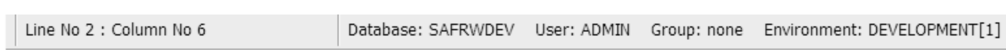
Menu	Option	Notes
	Group Security	A further sub-menu appears: • **Membership...** - to update group members. For more details, see task "**Modifying group membership**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". • **Permissions** - a further sub-menu appears: – **Permissions, By Group...** - to update group access rights by selecting a group first. For more details, see task "**Modifying group permissions by group**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". – **Permissions, By Environment...** - to update group access rights by selecting an environment first. For more details, see task "**Modifying group permissions by environment**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Batch Activate	A further sub-menu appears: • **Lookup Paths** - to activate multiple lookup paths. For more details, see task "**Batch activate lookup paths**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". • **Views** - to activate multiple views. For more details, see task "**Batch activate views**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Migrate...	Opens a screen to migrate a metadata item from one environment to another in the same SAFR Database. For more details, see topic "**Migrate metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Export	Opens a screen to export a metadata item to an XML file. For more details, see topic "**Export Metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Import...	Opens a screen to import a metadata item from an XML file into the workbench. For more details, see topic "**Import Metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Find/Replace Text in View Logic	Opens a screen to perform find and replace changes on logic text stored in one or more views. For more details, see task "**Finding and replacing logic text**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Menu	Option	Notes
	Empty Deleted Views Folder	Delete all views stored in View Folder "**Deleted Views**". For more details, see task "**Empty "Deleted Views" folder**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Clear Environment	Delete all metadata in an environment.. For more details, see task "**Clear environment**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Window	Show	A list of screens appears that can be opened: • Navigator, • Metadata List, • Column Source Properties, • Sort Key Properties, • View Source Properties, • Sort Key Titles, • View Activation Errors, • Logic Text Helper.
Help	Help Content	Opens the workbench help system as a full screen.
	About SAFR Workbench...	Displays the version and other details of the workbench software.

13 Status Bar

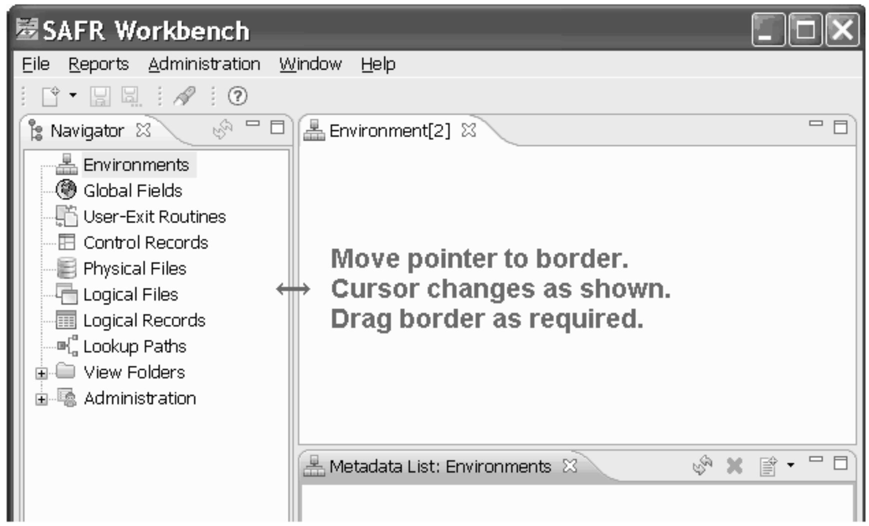
Normally, the status bar appears with data similar to:

Inside **logic text** this gives extra information at left regarding the position of the cursor in the logic text screen:



If you selected "**Use Old Compiler**" during login, this is displayed at right:

14 Resize screen borders



15 Drag and drop options

Drag the heading of a screen around and a black rectangle shows the new position for the screen. When you release the left button, the screen moves to the new position.

When you exit the workbench these positions are saved for your next session.

16 Minimizing and maximizing any screen

To minimize any screen in the workbench click . The screen is replaced by a restore icon that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the screen visible as before.

Click on to make the screen as large as possible. Click on the restore icon to make the screen visible as before.

17 Double click on a screen heading

This **maximizes** that screen. Another double click restores the screen to the original position.

18 Right click on screen headings

Right click on a screen heading to see these options (some may be disabled in certain situations):

- **Detached** - allows a screen to float above the other screens. After clicking this item, drag the screen to the required position. Later, right clicking the screen heading shows a tick beside Detached. Click on the tick to remove the detached state. You may need to drag the screen to return to the original position.
- **Restore** - to reverse a minimization or maximization
- **Move** - to move either the View, Editor or a group of tabs in a similar way to that shown under heading **Drag and Drop options** above.
- **Size** - to resize borders of that screen. Left, right, top and bottom borders are listed, although some may be grey (disabled) in certain situations.
- **Minimize** - to reduce the screen to a restore icon that is relocated to the right, bottom or left border of the workbench.
- **Maximize** - to make the screen as large as possible.
- **Close** - to close this screen.
- **Close Others** - to close the other tabs that are grouped with the current screen.
- **Close All** - to close this screen and all screens that have tabs grouped with this screen.

19 Exit the Workbench

Click **File -> Exit** or click in the top right hand corner.

Chapter 2. Administrators Guide

Administrators START HERE

Before you begin

The following topics are general background for a system administrator or environment administrator:

- All overview topics - for example, "**Metadata overview**" and "**WE Security overview**".
- "**Basics of using the SAFR Workbench**",
- "**Logging into the SAFR Workbench**",
- "**Return to login**",
- "**Finding screen help**",
- "**What are the keyboard shortcuts?**"

Ensure you know the following:

- The goals of using SAFR in your company.
- The **mainframe systems** in your company appropriate for using SAFR. These suggest environments you need in the SAFR Workbench. For example, this might be your accounting systems, sales systems, and market research. These areas may be broken down more, into types of accounting, sales groups and markets for different products.
- The **mainframe datasets and DB2 tables** relevant for SAFR processing.
- Any **user-exit routines** used by your company. For example, some data might be encrypted, or some keys may be generated from other information.
- The **mainframe users** who need access to SAFR.

To find the topics mentioned above, see the next section.

About this task

All topics mentioned above and below can be found in a PDF file. To find the appropriate PDF for a topic, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Login to the SAFR Workbench. See your IBM representative if you need help with this.
2. Ensure you have read the topics given under heading **Before you begin** above.
3. Create and modify **environments**. See these topics:
   a. "**Environments overview**",
   b. "**Environments - advanced overview**",
   c. "**Creating environments**",
   d. "**Modifying environments**".
4. Create and modify **physical files**. See these topics:
   a. "**Physical files overview**",
   b. "**Creating physical files**",

c. "**Modifying physical files**".

5. Create and modify **logical files**. See these topics:
   a. "**Logical files overview**",
   b. "**Creating logical files**".
   c. "**Modifying logical files**".
6. Create and modify **global fields**. See these topics:
   a. "**Global fields overview**",
   b. "**Creating global fields**",
   c. "**Modifying global fields**".
7. Create and modify **logical records**. See these topics:
   a. "**Logical records overview**",
   b. "**Creating logical records**",
   c. "**Modifying logical records**".
8. Create and modify **user-exit routines**. See these topics:
   a. "**User-exit routines overview**",
   b. "**Creating user-exit routines**",
   c. "**Modifying user-exit routines**".
9. Create and modify **control records**. See these topics:
   a. "**Control records overview**",
   b. "**Creating control records**",
   c. "**Modifying control records**".
10. Create and modify **view folders**. See these topics:
    a. "**View Folders overview**",
    b. "**Creating view folders**",
    c. "**Modifying view folders**".
11. Create and modify **groups**. Only create a group without allocating members or permissions at this stage. See these topics:
    a. "**Groups overview**",
    b. "**Groups - advanced overview**",
    c. "**Creating groups**",
    d. "**Modifying groups**".
12. Create and modify **users**. See these topics:
    a. "**Users overview**",
    b. "**Creating users**",
    c. "**Modifying users**".
13. Modify **group membership and permissions**. See these topics:
    a. "**Groups overview**",
    b. "**Groups - advanced overview**",
    c. "**Modifying groups**",
    d. "**Modifying group membership**",
    e. "**Modifying group permissions by group**",
    f. "**Modifying group permissions by environment**".
14. Provide these details to general users so they can **login to the workbench**:

a. The data required for SAFR Connection Manager. For details, see topics "**SAFR Connection Manager screen help**" and "**Logging into the SAFR Workbench**".
b. User ID and password for the user.
c. **Environment(s) and group(s)** for the user. For details, see topic "**SAFR Login screen help**".

15. Provide the relevant details below to general users:
    a. Control records,
    b. Physical files,
    c. Logical files,
    d. Logical records,
    e. Global fields,
    f. User-exit routines,
    g. View folders.

What to do next

After the above is complete, talk with the general users to determine maintenance required for the above items and any new requirements. For maintenance of multiple items, the following topics may also be useful:

- "**Batch activate lookup paths**",
- "**Batch activate views**".

A system administrator or environment administrator can also perform all the function of a general user. For details see the **General users guide**.

From time to time, the following overview topics are also useful:

- "**Metadata overview**",
- "**Metadata - advanced overview**",
- "**Export metadata overview**",
- "**Import metadata overview**",
- "**Migrate metadata overview**".

Basics of using the SAFR Workbench

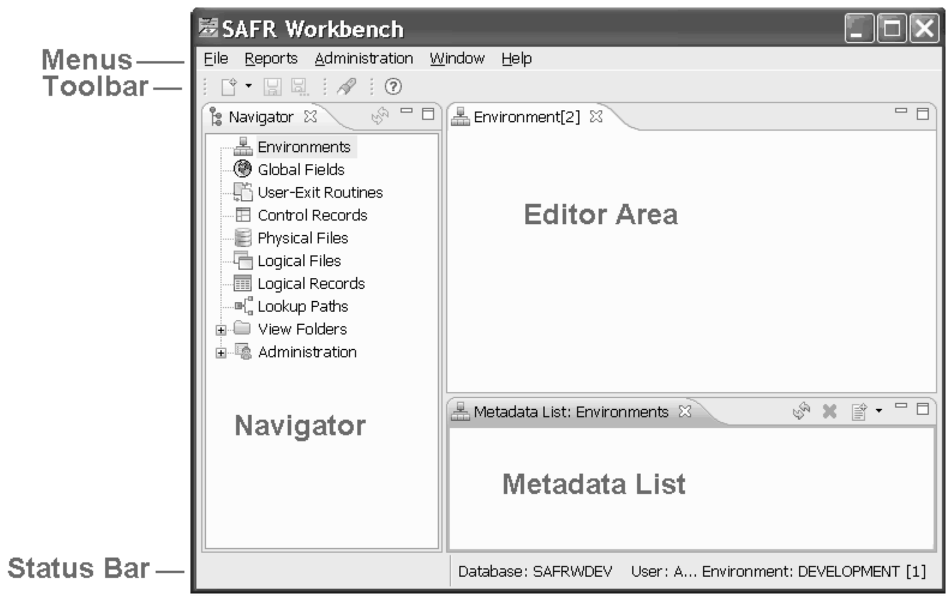
01 Summary of this topic

This topic covers the following:

02 What does the SAFR Workbench do?

This is covered in topic "**Workbench overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

03 Structure of the screens in the Workbench



04 How to do most work in the Workbench

See headings **Menus** and **Toolbars** below for a complete list of the tasks that can be performed in the workbench.

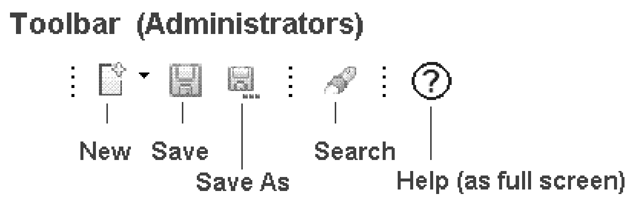
Most work is modifying some existing metadata item, as follows:

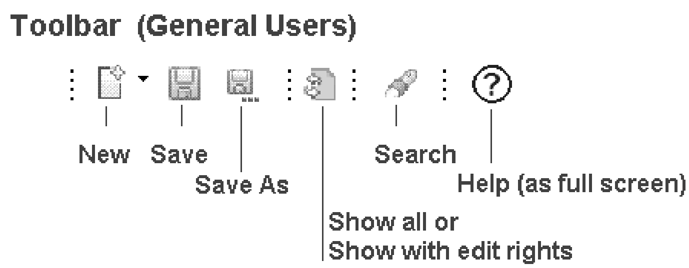
1. Click on a **node in the Navigator.** The Metadata List displays a table of items.
2. Double click on an **item in the Metadata List**. An edit screen opens in the Editor Area.
3. Add or modify information in the **screen in the Editor Area**. In most cases work in the edit screen ends by clicking  (the save icon). Other ways to save are to select **File -> Save** or click Ctrl+S. There may be other ways work in the edit screen ends. When the work in the edit screen is complete, close that screen by clicking on X in the tab similar to:

4. **If you do not save** before closing a screen (or before closing the workbench) a screen displays called **Save Changes?** Choose from **Yes** (save), **No** (no save) and **Cancel** (do not close).

WARNING: it is possible to launch two screens in the Editor Area that are changing the same metadata item. This is not recommended and may result in loss of changes from one of the screens.

05 Toolbars





Both system administrators and environment administrators see "Toolbar (Administrators)" above.

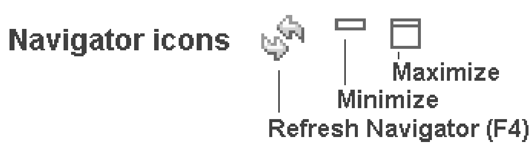
Button	**Notes**
New (Ctrl + N)	If you clicked this item in the **Administration** or **Components** menu, a further sub-menu appears with all the metadata item types. A grey item means you do not have rights to create that type of item. Click a non-grey item type to launch a create of a new item. If you clicked **Ctrl + N**, then you are attempting to create an item where the type is the currently highlighted node in the Navigator. If the Navigator has a view folder highlighted, then Ctrl + N creates a new view. If the Navigator is not visible, then this combination of keys has no effect.
Save (Ctrl + S)	Saves the active edit screen. Saves all tabs of that screen.
Save As (Ctrl + Shift + S)	Copies a metadata item in the active editor screen and saves with a new name. For more details, see task "**Copying metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Button	Notes
Show all or Show with edit rights	Changes the display of lists of metadata for general users. Click this button again to switch choices between "**Show all**" and "**Show with edit rights**". For more details of this, see topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Search (F3)	This menu item allows searching of a list of metadata items. You must have first clicked in a list of metadata that can be searched. The Metadata List can be searched, as can many lists of metadata in Editor screens. For more details, see task "**Searching lists of metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Help	Opens the workbench help system as a full screen.

06 Navigator

If the Navigator is not visible, click **Window -> Show -> Navigator**.

The Navigator lists the types of metadata as nodes in a tree structure. The **Administration** node is only displayed for a system administrator. The nodes "**View Folder**" and "**Administration**" have a plus + sign. Click on the plus + sign to expand the node and show items underneath. Click on any node or an expanded item to display the Metadata List for that node or item.

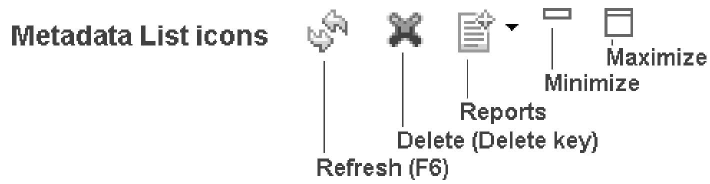


Button	Notes
Refresh Navigator (F4)	The Refresh Navigator icon is used to ensure the View Folder list in the Navigator contains current data. If this icon is grey, dick on the "**View Folders**" node in the Navigator to activate this icon. When active, click on this icon or press F4 to refresh the Navigator with current view folder data. Alternatively, double click on "**View Folders**" to refresh the Navigator in one action.
Minimize	The Navigator is replaced by a restore icon that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the Navigator visible as before.
Maximize	Make the Navigator as large as possible. Click on the restore icon to make the Navigator visible as before.

07 Metadata List

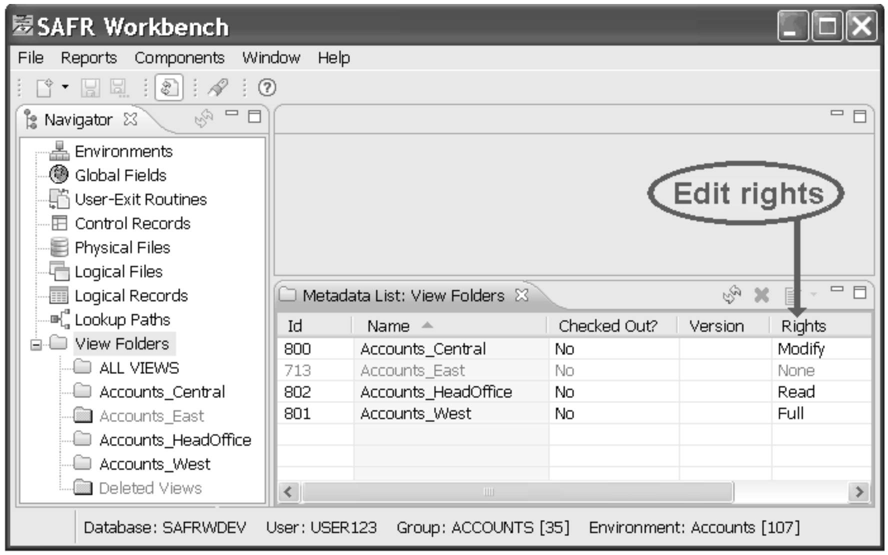
If the Metadata List is not visible, click on an item in the Navigator. Alternatively, click **Window -> Show -> Metadata List**.

The Metadata List displays a list of all examples of the node or item that was clicked in the Navigator. Double click on any line in the list to display an edit screen in the Editor Area.



Button	Notes
Refresh (F6)	Refresh the Metadata List with current data.
Delete (Delete key)	Delete the currently selected item in the Metadata List. For more details, see task "**Deleting metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Reports	An item must be selected in the Metadata List first. Click the down arrow to see a list of the possible reports for the item. If there is no selected item, or that item has no possible reports, then this icon has no effect. For more details, see task "**Generating reports on metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Minimize	The Metadata List is replaced by a restore icon that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the Metadata List visible as before.
Maximize	Make the Metadata List as large as possible. Click on the restore icon to make the Metadata List visible as before.

One of the most important parts of the Metadata List is the column "**Rights**". These refer to edit rights to a particular item of metadata. For example, if you click on "**View Folders**" in the **Navigator**, the Metadata List may appear as follows:



For more on edit rights and security, see topic "**WE Security overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

08 Editor Area

To modify an existing item, double click on an item in the Metadata List to display an edit screen.

To create a new item, click the **arrow beside**  (the new icon on the Toolbar).

Alternatively, to create a new item a system administrator or environment administrator can click **Administration -> New** and select an item. System administrators can create all item types. Environment administrators (in the appropriate environment) can create all types of metadata except environments, users and groups.

Alternatively, to create a new item a general user can click **Components -> New** and select an item. General users have limited rights in creating items, based on the group selected during login.

09 Other screens

There are many more screens than mentioned above. Open some of these screens by clicking **Window -> Show** and choosing a screen type. Some screens can only be reached by clicking on specific buttons on specific screens in the appropriate situations.

10 Keyboard Shortcuts - complete list

See topic "**What are the keyboard shortcuts?**" That topic is elsewhere in this PDF - see the table of contents.

11 How do I find help inside the workbench?

See topic "**Finding screen help**". That topic is elsewhere in this PDF - see the table of contents.

12 Menus

Below is a table of menus available in the SAFR Workbench.

The **Administration** and **Components** menus are the same menu. System administrators and environment administrators see menu "**Administration**". General users see menu "**Components**".

System administrators always have rights to all Administration menu items.

Environment administrators are missing some rights, so some items are grey on the Administration menu.

General users only have rights to the **Components** menu as given by the group selected during login. If a menu item is grey then the login group does not provide rights to that item.

Items on the **Reports** menu are **grey** until an appropriate metadata example is highlighted in the Metadata List or a particular metadata item has an active edit screen. All users of the workbench can potentially access all items on the Reports menu, unless a general user does not have read edit rights to a particular metadata item.

Menu	Option	Notes
File	Return to login... (Ctrl-L)	Return to the SAFR Login screen to login a different way than currently. For more details, see task "**Return to login**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Search (F3)	This menu item allows searching of a list of metadata items. You must have first clicked in a list of metadata that can be searched. The Metadata List can be searched, as can many lists of metadata in Editor screens. For more details, see task "**Searching lists of metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Open View (Ctrl+O)	The **Open View** screen appears. Type a view id number and press OK to open that view.
	Save (Ctrl+S).	Saves the changes on the active edit screen.
	Save As (Ctrl + Shift + S)	Copies a metadata item in the active editor screen and saves with a new name. For more details, see task "**Copying metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Recent Views	Displays a list of the last five recently opened views. Click on an item to open that view.

Menu	Option	Notes
	Open Log File	Select a log file from a list. The selected file displays in Notepad. For more details, see topic "**WE log file overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Change Log Path	The **Browse For Folder** screen appears. For more details, see topic "**Change Log path screen help**". A link to that topic is under **Related reference** below.
	Update User Profile.	Opens a screen to allow the user to edit their own user record. For more details, see task "**Modifying own user account**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Exit	Exits the entire workbench.
Edit		This menu appears on some screens. See the relevant screen help topic for details.
Action		This menu appears on some screens. See the relevant screen help topic for details.
Reports	Environment Security Report	A further sub-menu appears that allows a choice of "**by Id**" and "**by Name**". This selects the order of the groups listed in this report.
	Logical Record Report	Creates a Logical Record Report. For more details, see topic "**How do I generate a Logical Record Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Lookup Path Report	Creates a Lookup Path Report. For more details, see topic "**How do I generate a Lookup Path Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Properties Report	Creates a View Properties Report. For more details, see topic "**How do I generate a View Properties Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Column Report	Creates a View Column Report. For more details, see topic "**How do I generate a View Column Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	View Column PIC Report	Creates a View Column PIC Report. For more details, see topic "**How do I generate a View Column PIC Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Dependency Checker	Opens the Dependency Checker screen that allows checking all dependencies for a particular metadata item. For more details, see topic "**How do I generate a Dependency Checker Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

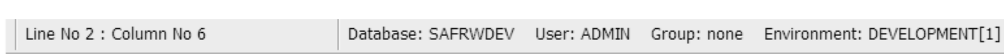
Menu	Option	Notes
Administration or Components	New (Ctrl + N)	If you clicked this item in the **Administration** or **Components** menu, a further sub-menu appears with all the metadata item types. A grey item means you do not have rights to create the type of item. Click a non-grey item type to launch a create of a new item. If you clicked **Ctrl + N**, then you are attempting to create an item where the type is the currently highlighted node in the Navigator. If the Navigator has a view folder highlighted, then Ctrl + N creates a new view. If you clicked Ctrl + N and the Navigator is not visible, then this combination of keys has no effect.
	Group Security	A further sub-menu appears: • **Membership...** - to update group members. For more details, see task "**Modifying group membership**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". • **Permissions** - a further sub-menu appears: – **Permissions, By Group...** - to update group access rights by selecting a group first. For more details, see task "**Modifying group permissions by group**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". – **Permissions, By Environment...** - to update group access rights by selecting an environment first. For more details, see task "**Modifying group permissions by environment**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Batch Activate	A further sub-menu appears: • **Lookup Paths** - to activate multiple lookup paths. For more details, see task "**Batch activate lookup paths**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**". • **Views** - to activate multiple views. For more details, see task "**Batch activate views**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Migrate...	Opens a screen to migrate a metadata item from one environment to another in the same SAFR Database. For more details, see topic "**Migrate metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Export	Opens a screen to export a metadata item to an XML file. For more details, see topic "**Export Metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Menu	Option	Notes
	Import...	Opens a screen to import a metadata item from an XML file into the workbench. For more details, see topic "**Import Metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Find/Replace Text in View Logic	Opens a screen to perform find and replace changes on logic text stored in one or more views. For more details, see task "**Finding and replacing logic text**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Empty Deleted Views Folder	Delete all views stored in View Folder "**Deleted Views**". For more details, see task "**Empty "Deleted Views" folder**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
	Clear Environment	Delete all metadata in an environment.. For more details, see task "**Clear environment**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
Window	Show	A list of screens appears that can be opened: • Navigator, • Metadata List, • Column Source Properties, • Sort Key Properties, • View Source Properties, • Sort Key Titles, • View Activation Errors, • Logic Text Helper.
Help	Help Content	Opens the workbench help system as a full screen.
	About SAFR Workbench...	Displays the version and other details of the workbench software.

13 Status Bar

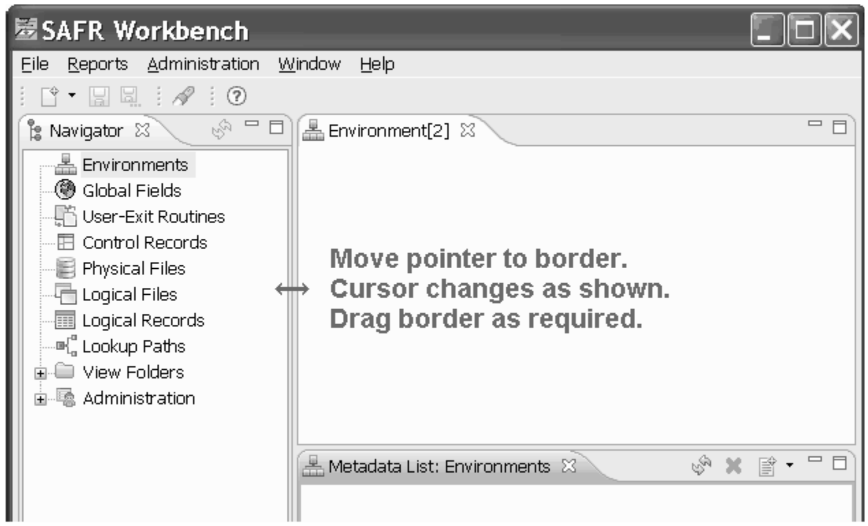
Normally, the status bar appears with data similar to:

Inside **logic text** this gives extra information at left regarding the position of the cursor in the logic text screen:



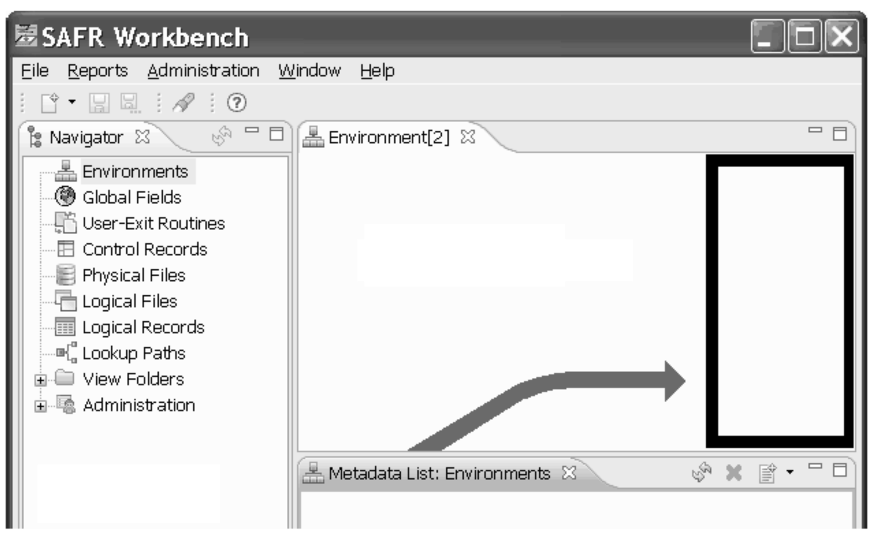
If you selected "**Use Old Compiler**" during login, this is displayed at right:

14 Resize screen borders



15 Drag and drop options

Drag the heading of a screen around and a black rectangle shows the new position for the screen. When you release the left button, the screen moves to the new position.



When you exit the workbench these positions are saved for your next session.

16 Minimizing and maximizing any screen

To minimize any screen in the workbench click . The screen is replaced by a restore icon that is relocated to the right, bottom or left border of the workbench. Click on the restore icon to make the screen visible as before.

Click on to make the screen as large as possible. Click on the restore icon to make the screen visible as before.

17 Double click on a screen heading

This **maximizes** that screen. Another double click restores the screen to the original position.

18 Right click on screen headings

Right click on a screen heading to see these options (some may be disabled in certain situations):

- **Detached** - allows a screen to float above the other screens. After clicking this item, drag the screen to the required position. Later, right clicking the screen heading shows a tick beside Detached. Click on the tick to remove the detached state. You may need to drag the screen to return to the original position.
- **Restore** - to reverse a minimization or maximization
- **Move** - to move either the View, Editor or a group of tabs in a similar way to that shown under heading **Drag and Drop options** above.
- **Size** - to resize borders of that screen. Left, right, top and bottom borders are listed, although some may be grey (disabled) in certain situations.
- **Minimize** - to reduce the screen to a restore icon that is relocated to the right, bottom or left border of the workbench.
- **Maximize** - to make the screen as large as possible.
- **Close** - to close this screen.
- **Close Others** - to close the other tabs that are grouped with the current screen.
- **Close All** - to close this screen and all screens that have tabs grouped with this screen.

19 Exit the Workbench

Click **File -> Exit** or click in the top right hand corner.

Batch activate lookup paths

Before you begin

Ensure you know the following:

- The **environment** for the lookup paths.

About this task

This topic activates a number of lookup paths at the same time. The word batch means the collection of lookup paths selected.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Migrate In** run permission in the environment for the relevant lookup paths. See your system administrator if you require more rights.

Ensure you are aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. Administrators click **Administration -> Batch Activate -> Lookup Paths**. General users click **Components -> Batch Activate ->Lookup Paths**. General users can always launch the Batch Activate Lookup Paths screen. The rights to run this utility and get results are described in "Before you begin" above.
3. In the **Batch Activate Lookup Paths** window, **select an environment** from the drop down box. System administrators see a list of all environments. Environment administrators see a list of environments where the group selected during login provides administrator access to those environments. General users can see a list of environments where the **group selected during login** has the **Migrate In** run permission for that environment. After a wait, data appears in the **Lookup Paths** section.
4. Refine the list by a choosing a button at bottom right for **Active, Inactive or Both**.
5. Sort this list. The options for sorting are:
   - Click "**Name**" in the heading to sort the lookup paths into reverse name order. Click repeatedly to switch between ascending and descending sort order.
   - Click "**Id**" in the heading to sort the lookup paths into ID number order. Click repeatedly to switch between ascending and descending sort order.
   - The same behavior works for columns "**Select**", "**Result**" and "**Status**" if required.
6. If the list is long, you can search the list. This is done by clicking in the Lookup Path list and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
7. Select one or more lookup paths with a tick in the Select column. Untick by clicking on the tick again. Click **Select All** and **Deselect All** to save time selecting or deselecting many lookup paths.
8. At any time during these steps, click the **Refresh** button to reload the data shown in the **Lookup Paths** section. The data can change during your time on this screen, and the **Refresh** button ensures the data displayed is current once more. The Refresh button will remove any ticks present and also remove any results and error messages.
9. When the appropriate lookup paths are ticked, click **Activate** to start the batch activation.

   For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Batch Activate Lookup Paths screen help**". To close the help, click X inside the "**Help**" tab.
10. The column **Result** displays **Pass** or **Fail** or **Load Error**. This indicates the success of the batch activation.
    - **Pass** - means the lookup path is active and ready for use.

- **Fail** - means the lookup path is inactive. Click on the word **Fail** to highlight that row. The Errors section displays the problems with that lookup path.
- **Load Error** - means one or more logical records are inactive. These logical records are necessary for the lookup path. Click on the word **Load Error** to highlight that row. The Errors section displays the inactive logical records causing the problem.

For errors or messages on this screen, see topic "**Batch Activate Lookup Paths errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

11. Fix any problems with the relevant lookup paths or logical records. The tasks to use are:
    - "**Modify lookup paths**"
    - "**Modify logical records**"

    To find these task topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

    If you use screens in the workbench to fix errors any items that affect lookup paths, return to the Batch Activate Lookup Paths screen to retry the activate again.
12. At any time, you may return to step 3 to try again with the same or different lookup paths.

What to do next

Any lookup paths activated are immediately available for use in a view.

Batch activate views

Before you begin

System and environment administrators can always perform this task. There are two ways a general user can perform this task:

- The **group selected during login** has the **Migrate In** run permission in the environment for the relevant views. In this case the general user can run this utility for any view in the environment.
- The **group selected during login** has at least **modify rights to one or more view folders** in the environment. In this case the general user can run this utility for those views where the user has modify rights to the view folder.

See your system administrator if you require more rights.

Ensure you are aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

About this task

This topic activates a number of views at the same time. The word batch means the group of views selected.

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "Before you begin" above.
2. Administrators click **Administration -> Batch Activate -> Views**. General users click **Components -> Batch Activate -> Views**. General users can always

launch the Batch Activate Views screen. The rights to run this utility and get results are described in "Before you begin" above.

3. When you first enter this screen, the list displays **all views in the current environment where you have rights to activate those views**. For more on rights, see "Before you begin" above.
4. Refine the list by a choosing a button at bottom right for **Active, Inactive or Both**.
5. Sort this list. The options for sorting are:
   - Click "**Name**" in the heading to sort the views into reverse name order. Click repeatedly to switch between ascending and descending sort order.
   - Click "**Id**" in the heading to sort the views into ID number order. Click repeatedly to switch between ascending and descending sort order.
   - Click "**VF Id**" in the heading to sort the views into view folder ID number order. Click repeatedly to switch between ascending and descending sort order.
   - Click "**View Folder Name**" in the heading to sort the views into reverse View Folder Name order. Click repeatedly to switch between ascending and descending sort order.
   - The same behavior works for columns "**Select**", "**Result**" and "**Status**" if required.
6. If the list is long, you can search the list. This is done by clicking in the View list and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
7. Select one or more views with a tick in the Select column. Untick by clicking on the tick again. Click **Select All** and **Deselect All** to save time selecting or deselecting many views.
8. At any time during these steps, click the **Refresh** button to reload the data shown in the**Views** section. The data can change during your time on this screen, and the **Refresh** button ensures the data displayed is current once more. The Refresh button will remove any ticks present and also remove any results and error messages.
9. When the appropriate views are ticked, click **Activate** to start the batch activation.

   For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Batch Activate Views screen help**". To close the help, click X inside the "**Help**" tab.
10. The column **Result** displays **Pass** or **Fail** or **Load Error**. This indicates if success of the batch activation.
    - "**Pass**" means the view is now status **active** and ready for use.
    - "**Fail**" means the view has an error. Click on "Fail" for that row and the **View Activation Errors** section displays the errors in that view.
    - "**Load error**" means a logical record or lookup path used in the view is inactive. Click on "Load error" for that row and the **Errors** section displays which items are inactive in that view.

    For errors or messages on this screen, see topic "**Batch Activate Views errors**" or "**View Activation Errors message help**". To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".
11. Fix any problems with logical records, lookup paths or views. The tasks to use are:
    - "**Modify logical records**"

- "**Modify lookup paths**"
- "**Modify views**"

To find these task topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

If you use screens in the workbench to fix errors any items that affect views, return to the Batch Activate Views screen to retry the activate again.

12. At any time, you may return to step 3 to try again with the same or different views.

What to do next

Any views activated are immediately available for submitting to the Performance Engine software to produce actual results.

Changing Log Path

About this task

This topic is about changing the path for the WE log file or viewing the current path. Each user of WE can nominate a unique log file path. When the log file path changes, the existing log is transferred to the new path and no log file data is lost for that session. Log files for completed sessions are untouched by this process.

For an introduction to a WE log file, see topic "**WE log file overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the Workbench in any environment.
2. Click **File -> Change Log Path...**.
3. View the current path for the log file. If viewing is sufficient, click Cancel. To change the path, either navigate to a different existing folder or create a new folder.

   To find screen help on all the ways to create a new folder, click . On the screen that appears, click **Screens** and choose topic "**Change Log Path screen help**".

   An alternative method to find screen help is to click **Help -> Help Content**. On the screen that appears, click **Screens** and choose topic "**Change Log Path screen help**".
4. When the required folder for the log file path is highlighted, click OK to save.

What to do next

If the log file path is changed, the new log file path is immediately in use. The log data for the current session is available in the new path and contains data for the entire session.

To open a log file, see topic "**Opening a log file**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Checking metadata dependencies

Before you begin

Ensure you know the following:

- The specific metadata item and the relevant environment.
- You have read rights to the relevant environment. System administrators always have read rights. Environment administrators and general users have read rights to environments depending on the group selected during login. See your system administrator if you require read rights to more environments.
- If you require a PDF report, ensure your computer has **Adobe Acrobat Reader** installed, version 9 or higher. This is free software available from **www.adobe.com**.
- If you require a PDF report, ensure you have **configured** Adobe Acrobat Reader as follows:
  1. Open Adobe Acrobat Reader
  2. Click **Edit, Preferences**
  3. Under "**Categories**", select "**Page Display**".
  4. For Zoom, select a value that makes a PDF easy to read. A recommended value is "**Fit Width**"
  5. Click **OK**
  6. Close Adobe Acrobat Reader

About this task

This task shows the dependencies for a metadata item inside one environment, which is useful when considering the delete of that metadata item.

The idea of "dependency" works in both directions - what depends on an item and what an item depends on.

For example, a Logical Record (LR) **field** always depends on a logical record that the field belongs to. A view depends on an LR field when the view refers to an LR field in a logical record for a source logical file. The LR field can be thought of as depending on the logical record, and the view can be thought of as depending on the LR field.

Both these cases of dependency are included in the results of this task.

For more on deleting an item of metadata, see task "**Deleting metadata**". That topic is elsewhere in this PDF - see the table of contents.

Procedure

1. Click "**Reports -> Dependency Checker...**".
2. Select an **environment** from the drop down list. System administrators can select any environment. Environment administrators and general users can choose only from the environments associated with the group selected during login. A general user may be required to login into a different group and/or environment - see task "**Return to login**".
3. Select a **component type** from the drop down list.

4. If the component type is **LR Field**, the screen displays radio buttons for "**Show All LR Fields**" and "**Show LR Fields only from the following LR**". There is also a drop down list below the second radio button.
   - The radio button "**Show All LR Fields**" changes the drop down list "**Component**" to show every LR (Logical Record) field in the environment selected above.
   - The radio button "**Show LR Fields only from the following LR**" allows choosing one logical record from the drop down list immediately below. This changes the drop down list "**Component**" to show only the LR fields from the selected logical record.
5. Select a particular metadata item from the drop down list "**Component**".
6. Click **Check** to view the Dependency Checker Report for this metadata item under **Dependency Tree** at right. Navigate the tree as follows:
   - Click ⊞ to expand parts of the dependency tree.
   - Click ⊟ to close the structure underneath.
   - **Specific metadata items** are shown in format: **name[id]** for example Customers[652]. **Double click on a metadata item in the dependency tree to create a new sub-tree under that item.** A new sub-tree does not occur of a metadata item is already displayed higher in the dependency tree. Expand a sub-tree by clicking ⊞. Any metadata items in the sub-tree are also opportunities to double click.
7. Optionally, click **Export as Report** and click the **Export** button to create a PDF file containing the Dependency Tree as displayed. This means that if you expand or close various parts of the tree, the PDF file created is different. The report displays in Adobe Acrobat Reader. The Acrobat Reader allows printing, saving and other choices. Click X to close the report. Note that once the PDF file is saved to a location on disk, you can view and print the PDF file outside the workbench.
8. Optionally, click **Export as CSV file** and **modify the location text field** underneath. The location specifies the path where the CSV file is stored. Optionally click **Browse...** to navigate to the location instead of typing the location. Once the location is appropriate, click the **Export** button to create a CSV file in the given location containing the Dependency Tree as displayed. This means that if you expand or close various parts of the tree, the CSV file created is different.

What to do next

For more on generating this report, see "**How do I generate a Dependency Checker Report?**" To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

If you exported either a PDF file or a CSV file to a folder, then those files are available in that folder when you exit the SAFR Workbench.

Clear environment

Before you begin

This task deletes all metadata in an environment, including any updates to metadata that you currently have in progress on any edit screens.

System and environment administrators have the rights to clear an environment. General users cannot perform this task.

If you are considering clearing an environment, consider performing these other tasks first:

- **Exporting metadata** which creates a backup copy of a metadata item in an XML file.
- **Migrating metadata between environments** which can copy or move a metadata item to a different environment.

These topics are elsewhere in this PDF - see the table of contents.

About this task

This task clears all metadata from an environment. There must be no metadata in an environment in order to delete an environment.

Procedure

1. Ensure you are logged into the SAFR Workbench with **appropriate rights**. For notes on these rights, see "Before you begin" above.
2. Click on "Environments" in the Navigator to display all environments in the Metadata List. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. **Select the environment** in the Metadata List and click **Administration -> Clear Environment**. Only one environment can be cleared at one time. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. A window appears named "**Clear Environment**" and displays "This action will remove all the components and View definitions from the selected Environment" . Click **OK** to proceed with the clear operation. Click **Cancel** to avoid any action.
5. Another message window may appear. If you are editing any metadata for that environment at this time, a window appears named "**SAFR Workbench**" and displays "Clearing this environment will close all the currently opened editors and you will lose the modified data." Click **OK** to proceed with the clear operation. Click **Cancel** to avoid any action.
6. Once the cursor changes from an hourglass to a normal cursor, the clear is complete. The environment now contains no metadata.

   All messages for this topic are listed in topic "**Clear environment messages**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

Once the environment is cleared, these tasks are useful options:

- **Deleting metadata** (to delete the environment record itself),
- Any of the "**Creating**" tasks to create new metadata for this environment,
- **Importing metadata** (to create new metadata from XML files),
- **Migrating metadata between environments** (to copy in or move metadata from another environment).

These topics are elsewhere in this PDF - see the table of contents.

Copying metadata

Before you begin

Ensure you are logged into the relevant environment for the metadata item to be copied. Ensure you have the appropriate rights as described under section "**About this task**" below.

About this task

Use this topic to copy an item of metadata. This topic is often called "**Save As**".

You must have the appropriate rights to perform this task. System administrators have the appropriate rights except for copying:

- **Environments** (no copy allowed)
- **View Folders** (no copy allowed)

Environment administrators have the appropriate rights except for copying:

- **Environments** (no copy allowed)
- **Groups** (only a system administrator can copy groups)
- **Users** (only a system administrator can copy users)
- **View Folders** (no copy allowed)

General users can copy metadata if the login group has:

- Create rights where the type of metadata to be copied is one of:
  - Logical file,
  - Logical record,
  - Physical file,
  - User-exit routine.
- Modify rights to the view folder that stores a copied view.
- Read rights to the metadata item(s) to be copied.

See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Note that each type of metadata has specific limitations for copying, as shown in the table below:

To copy a	note the following ...
Control Record	Only a system administrator or environment administrator can copy a control record.
Environment	No copy function is provided. Instead, a system administrator can create a new environment - see task "**Creating environments**". Metadata inside an environment can be migrated to the new environment by a system administrator- see task "**Migrating metadata between environments**". To find this task in a PDF, see chapter "**Cross reference of topics and PDF files**".

To copy a	note the following ...
Global Field	Only a system administrator or environment administrator can copy a global field.
Group	Only a system administrator can copy a group. When you copy, the associations to users, environments, and component permissions are also copied.
Logical File	When you copy, the associations to physical files are also copied.
Logical Record	When you copy, the associations to logical files are also copied.
Lookup Path	When you copy, all parts of the lookup path are copied.
Physical File	The physical file is copied without any associations to logical files.
User	Only a system administrator can copy a user. A window asks about copying the group memberships. Click "Yes" to copy the group memberships and No to copy the user without any group membership.
User Exit-Routine	When you copy, you must provide new names for the following: • user-exit routine • executable
View Folder	No copy function is provided. Instead, create a new view folder - see task "**Creating view folders**". To find that task in a PDF, see chapter "**Cross reference of topics and PDF files**". To copy views from one view folder to another, see the "View" row below.
View	After you copy the view, update the new view to change the view folder (if required).

Procedure

1. Note: the metadata item to be copied is the "**base**" metadata item. The copy creates the "**copied**" metadata item. The first step is to **open the "base" metadata item.**
2. If required, change the "base" metadata item before the copy. The changes do not affect the "base" metadata item unless you save the "base" item.
3. To start the copy
   - **EITHER** click  (the Save As button).

     If this button is grey, then see section "**About this task**" above - either the copy function does not exist for that metadata item or you do not have appropriate rights.
   - **OR** press **Ctrl+Shift+S**.

     If nothing happens, see section "**About this task**" above - either the copy function does not exist for that metadata item or you do not have appropriate rights.
   - **OR** click **File, Save As**.

     If this menu item is grey, then see section "**About this task**" above - either the copy function does not exist for that metadata item or you do not have appropriate rights.

4. The "**Save As**" window appears. Specify a new name for the metadata item. For a **user exit-routine**, you must also specify a new name for the **executable**.
5. For copy of a user, a "**Copy Group Membership**" window appears, asking if the "copied" user belongs to the same groups as the "base" user. Click Yes or No.
6. Wait for the copy to complete. The "copied" item has a new tab. The "base" item has a separate tab (because it is a separate metadata item now). You can change or save or close the "base" metadata item. You can change or save or close the "copied" metadata item.

What to do next

After the above is complete, the "copied" metadata item is ready for immediate use. The section "**About this task**" above describes the limitations of the copy function. For example, a copied physical file does not initially have any associations to logical files. The limitations described in "About this task" indicate where the "copied" metadata items need modification.

Creating control records

Before you begin

Ensure you know the following:
- The **environment** for the new control record.
- The values required in the new control record for the fields:
  - Maximum Extract File Number,
  - First Fiscal Month,
  - Beginning Period,
  - Ending Period.

About this task

Use this topic to create new control records. Only system administrators and environment administrators can perform this task.

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator or environment administrator** in the relevant environment.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Control Record**,
   - **OR** click **Administration -> New -> Control Record**.
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Control Record screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

For errors or messages on this screen, see topic "**New Control Record errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the control record is ready for immediate use in a view.

Creating environments

Before you begin

Ensure you know the following:

- The **name** of the new environment.
- Any requirements to **enable archiving** in the new environment.
- A **control record name** for the new environment.
- A **group** to be associated with the new environment.

About this task

Use this topic to create new environment records. Only system administrators can perform this task.

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Environment**,
   - **OR** click **Administration -> New -> Environment**.
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Environment screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**New Environment errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the environment is ready for immediate use.

Once a new environment is created, these tasks are useful options:

- Any of the "**Creating**" tasks to create new metadata for this environment,
- **Importing metadata** (to create new metadata in this environment from XML files),
- **Modifying environments** (to modify this environment record),

- **Migrating metadata between environments** (to copy in or move metadata from another environment).

These topics are elsewhere in this PDF - see the table of contents.

Creating global fields

Before you begin

Ensure you know the following:

- The **environment** for the global field.
- The **name and values required** for a new global field.

About this task

Use this topic to create new global fields. Only system administrators and environment administrators can perform this task.

Procedure

1. Ensure you are logged into the SAFR Workbench as an **administrator** in the relevant environment.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Global Field**,
   - **OR** click **Administration -> New -> Global Field**.
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Global Field screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**New Global Field errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the global field is ready for immediate use in a view or logical record.

Creating groups

Before you begin

Ensure you know the following:

- A **name** for the new group.

About this task

Use this topic to create new groups. Only system administrators can perform this task.

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Group**,
   - **OR** click **Administration -> New -> Group**.
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Group screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**New Group errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the group is ready for immediate use.

To change the membership, see topic "**Modifying group membership**". To change permissions for the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**". These topics are elsewhere in this PDF - see the table of contents.

To view a **report on environment security** that contains all groups in that environment, use one of these topics:
- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports on metadata**"

To find these topics in PDFs, see chapter "**Cross reference of topics and PDF files**".

Creating logical files

Before you begin

Ensure you know the following:
- The **environment** for the logical file.
- The **values required** for a new logical file.

About this task

Use this topic to create new logical files. The physical files to be associated must already exist in the SAFR Workbench. The logical records may not exist yet and those associations are setup when the relevant logical records are created or modified.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Create Logical File** right in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:
- "**Logical Files overview**"
- "**Logical Records overview**"
- "**Physical Files overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of the rights, see heading "**About this task**" above.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Logical File**,
   - **OR** click **Administration -> New -> Logical File** (for system administrators and environment administrators),
   - **OR** click **Components -> New -> Logical File** (for general users).
3. Enter or modify values in the fields. Click **Add** or **Remove** to change the association between this logical file and any physical files with the same record format. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Logical File screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**New Logical File errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the logical file is ready for immediate use in a view.

Creating logical records

Before you begin

Ensure you know the following:
- The **environment** for the logical record.
- The **fields required** for a new logical record.

About this task

Use this topic to create new logical records. The logical records are associated with logical files which must already exist in the SAFR Workbench.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Create Logical Record** right in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:
- "**Global Fields overview**"
- "**Logical Files overview**"
- "**Logical Records overview**"
- "**Physical Files overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of the rights, see heading "**About this task**" above.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **Logical Record**,
   - **OR** click **Administration -> New -> Logical Record** (for system administrators and environment administrators),
   - **OR** click **Components -> New -> Logical Record** (for general users).
3. On the "**LR properties**" tab, enter or modify values in the fields. For screen help on any of the tabs press F1. Above **Related Topics** click to maximize the help and select one of the screen help topics . To close the help, click X inside the "**Help**" tab.
4. On the "**LR fields**" tab, create or modify fields for the logical record. Screen help provides comprehensive instructions about this. For screen help on any of the tabs, press F1. Above **Related Topics** click to maximize the help and select one of the screen help topics. To close the help, click X inside the "**Help**" tab.
5. On the "**Associated Logical Files**" tab, add or remove logical files associated with this logical record. See screen help for comprehensive instructions. For screen help on any of the tabs, press F1. Above **Related Topics** click to maximize the help and select one of the screen help topics. To close the help, click X inside the "**Help**" tab.
6. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

For messages on this screen, see topic "**New Logical Record errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the logical record is complete, the logical record has a status of either active or inactive. Only active logical records can be used in a view. Modify the logical record to remove the problems that prevent a status of active.

To see a **report on selected logical records**, use one of these topics:
- FAQ topic "**How do I generate a Logical Record Report?**"
- Task "**Generating reports**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Creating physical files

Before you begin

Ensure you know the following:
- The **environment** for the physical file.
- The **values required** for a new physical file.

About this task

Use this topic to create new physical files. The physical files are associated with logical files when you create or modify logical files.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Create Physical File** right in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:
- "**Physical Files overview**"
- "**Common Key Buffers overview**"
- "**Pipes overview**"
- "**Tokens overview**"
- "**Logical Files overview**"
- "**Logical Records overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of the rights, see heading "**About this task**" above.
2. Do the following:

- **EITHER** click the **arrow beside** (the new icon) and select **Physical File**,
- **OR** click **Administration -> New -> Physical File** (for system administrators and environment administrators),
- **OR** click **Components -> New -> Physical File** (for general users).

3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New Physical File screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**New Physical File errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the physical file is ready for immediate use in a logical file.

Creating users

Before you begin

Ensure you know the following:
- A **User ID and name details** for the new user.
- The **default environment** for the new user.
- The **default view folder** for the new user.
- The **default group** for the new user.

About this task

Use this topic to create new users. Only system administrators can perform this task.

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **User**,
   - **OR** click **Administration -> New -> User**.
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New User screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

For errors or messages on this screen, see topic "**New User errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the user is NOT ready for immediate use. Immediately afterwards, make the user a member of their default group or at least one group using topic "**Modifying group membership**". To change the permissions in the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**". These topics are elsewhere in this PDF - see the table of contents.

Creating user-exit routines

Before you begin

Ensure you know the following:
- The **environment** for the user-exit routine.
- The **values required** for a new user-exit routine.

About this task

Use this topic to create new user-exit routines.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Create User-Exit Routine** right in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

For an introduction to user-exit routines, see topic "**User-exit routines overview**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **User-Exit Routine**,
   - **OR** click **Administration -> New -> User-Exit Routine** (for system administrators and environment administrators),
   - **OR** click **Components -> New -> User-Exit Routine** (for general users).
3. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New User-Exit Routine screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

Help with error messages is available in topic "**New User-Exit Routine errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the user-exit routine is ready for immediate use in a physical file or view.

Creating view folders

Before you begin

Ensure you know the following:
- The **environment** for the view folder.
- The **name** of the new view folder.

About this task

Use this topic to create new view folders.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has the **Create View Folders** right in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

For an introduction to user-exit routines, see topic "**View folders overview**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. Do the following:
   - **EITHER** click the **arrow beside** (the new icon) and select **View Folder**,
   - **OR** click **Administration -> New -> View Folder** (for system administrators and environment administrators),
   - **OR** click **Components -> New -> View Folder** (for general users).
3. Enter or modify the name of the new view folder. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**New View Folder screen help**". To close the help, click X inside the "**Help**" tab.
4. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   Help with error messages is available in topic "**New View Folder errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the view folder is ready for immediate use.

The Refresh Navigator icon  is used to ensure the View Folder list in the Navigator contains current data. If this icon is grey, dick on the "**View Folders**" node in the Navigator to activate this icon. When active, click on this icon or press F4 to refresh the Navigator with current view folder data. Alternatively, double click on "**View Folders**" to refresh the Navigator in one action.

Deleting metadata

Before you begin

For an introduction to metadata, see "**Metadata Overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Before delete of a metadata item, it is recommended taking a backup of that item - see task "**Exporting metadata**". This topic is elsewhere in this PDF - see the table of contents.

Before delete of a metadata item, check the dependencies for that metadata item - see task "**Checking metadata dependencies**". This topic is elsewhere in this PDF - see the table of contents. That task gives information about any possible adverse effects from delete of that metadata item.

- System administrators can delete any type of metadata item. Only a system administrator can delete a **user**, a **group** or an **environment**. Note that to delete an environment record itself, the environment must have no metadata and a system administrator must be logged into a different environment.
- Environment administrators can delete all types of metadata except user, group and environment.
- General users can delete metadata only where the **group selected during login** has **delete rights** to that item of metadata. The delete rights only cover logical files, logical records, physical files, user-exit routines and view folders. General users can potentially delete these metadata types.

  General users can also delete any **view** where the general user has delete access to the view folder.

Note that when any user deletes a view, the view is moved to the "**Deleted Views**" folder.

The "Deleted Views" folder acts like the "Recycle bin" in Windows - deleted views can be retrieved while still in the "Deleted Views" folder. Views stay in the "**Deleted Views**" folder until they are deleted a second time from there, or the "**Empty "Deleted Views" folder**" task is performed. Only a system or environment administrator can delete views from the "Deleted Views" folder. The topic "**Empty "Deleted Views" folder**" is elsewhere in this PDF - see the table of contents.

To delete an entire environment, all metadata must be cleared first - see task "**Clear environment**". Only a system or environment administrator can perform this task. This topic is elsewhere in this PDF - see the table of contents.

Before delete of a metadata item, check if this metadata item name exists in other environments - see task "**Finding all environments for a particular a metadata**

item name". This information is useful because delete may be necessary for the same item name in other environments. To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

About this task

This task describes how to delete metadata from the SAFR Workbench.

To perform this task you need the appropriate rights. The rights are detailed under heading "Before you begin" above.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

<u>**After requesting a delete, a window asks you to confirm the delete first.**</u> After you confirm, <u>each metadata item to be deleted is checked</u> as follows:

- **Control records** <u>cannot</u> be deleted if used in a view.

  If you attempt to delete a control record that is used in a view, a window appears named "**Control Record dependencies**". This window lists the views using that control record.

  For each view listed, edit the view, go to the "**View Properties, General**" tab, choose a different control record, and save. Once there are no more views referring to this control record, repeat the delete of this control record.
- **Groups** <u>cannot</u> be deleted if the group contains any associated users or associated environments. Only a system administrator can delete a group.

  If you attempt to delete a group that has associated users or environments, a window appears named "**Group dependencies**". This window lists any associated users and associated environments.

  If there are associated users, click **Administration -> Group Security -> Membership** , select the group, tick all associated users, click **Remove** and save. If there are associated environments, click **Administration -> Group Security -> Permissions -> By Group...** , select the group, tick all associated environments, click **Remove** and save. Once there are no more associated users and associated environments, repeat the delete of this group.
- **Environments** <u>can only</u> be deleted if all metadata in that environment has been cleared.

  See task "**Clear environment**". This topic is elsewhere in this PDF - see the table of contents.

  Only a system administrator can delete an environment, with two conditions. Firstly, the environment must contain no metadata, and secondly the system administrator cannot be currently logged into that environment.
- **Global fields** can be used in a logical record. A window named "**Global Field dependencies**" shows the logical records that use that global field.

  Click **OK** to delete that global field and remove that field from those logical records. Click **Cancel** to avoid any change.
- **Logical files** <u>cannot</u> be deleted if that logical file is:
  - The last associated with a logical record. This can be called a "one file" logical record.
  - Used in a lookup path.
  - Used as an output file or view source of any view.
  - Used in logic text (Extract Column Assignment) of an active view.

If you attempt to delete a logical file that meets any of these conditions, a window appears named "**Logical File dependencies**". This window lists the "one file" logical records, lookup paths and views using that logical file.

For each "one file" logical record, either associate that logical record with other logical files, or delete the logical record. For each lookup path or view listed, edit that item and remove references to that logical file and save. Once there are no more lookup paths, views or "one file" logical records using that logical file, repeat the delete of this logical file.

- **Logical records** cannot be deleted if that logical record is:
  - Used in a lookup path.
  - Used in view source or column source of any view.
  - Used in logic text (Extract Record Filter or Extract Column Assignment) of an active view.
  - Used in a sort key title of any view.

  If you attempt to delete a logical record that meets any of these conditions, a window appears named "**Logical Record dependencies**". This window lists the lookup paths and views that use that logical record.

  For each lookup path or view listed, edit the lookup path or view, change the logical record and save. Once there are no more lookup paths and views that use that logical record, repeat the delete of this logical record.
- **Lookup paths** cannot be deleted if that lookup path is:
  - Used in column source of any view.
  - Used in logic text (Extract Record Filter or Extract Column Assignment) of an active view.
  - Used in a sort key title of any view.

  If you attempt to delete a lookup path that meets any of these conditions, a window appears named "**Lookup Path dependencies**". This window lists the views using that lookup path.

  For each view listed, edit the view, remove the lookup path from all column source and any logic text and save. Alternatively, delete the views that refer to that lookup path. Once there are no more views using that lookup path, repeat the delete of this lookup path.
- **Physical files** cannot be deleted if that physical file is:
  - Used as an output file for the extract phase or format phase in the "**View Properties**" of any view
  - Used in logic text (Extract Column Assignment) of an active view.
  - The last associated with a logical file. This can be called a "one file" logical file.

  If you attempt to delete a physical file that meets any of these conditions, a window appears named "**Physical File dependencies**". This window lists the views and "one file" logical files using that physical file.

  You must remove the association of that physical file to the views or "one file" logical files, or delete those views or "one file" logical files.

  To remove the association with a view, edit the view and remove the physical file from either the "**View Properties, Extract Phase**" tab or the "**View Properties, Format Phase**" tab or from logic text and save. To remove the association with a "one file" logical file, edit the logical file, change physical file listed in "**Associated Physical Files**" and save. Once there are no more views and "one file" logical files using that physical file, repeat the delete of this physical file.

- **Users** are deleted once you have confirmed the delete. Only a system administrator can delete a user.
- **User-exit routines** cannot be deleted if that user-exit routine is:
  - Used in a physical file.
  - Use in a logical record.
  - Used in the "**View Properties**" of a view.
  - Used in logic text (Extract Column Assignment) of an active view.

  If you attempt to delete a user-exit routine that meets any of these conditions, a window appears named "**User Exit Routine dependencies**". This window lists the items using that user-exit routine.

  For each item listed, edit the item, and remove the reference to the user-exit routine. In a view, the user-exit routine can be used in the "**View Properties, Extract Phase**" tab, "**View Properties, Format Phase**" tab or in logic text. Once there are no more items referring to this user-exit routine, repeat the delete of this user-exit routine.
- **Views** are not deleted immediately.

  When you delete a view, then the view is placed in a folder "**Deleted Views**" and the status is made inactive.

  Later, the task "**Empty "Deleted Views" folder**" permanently deletes views in that folder. That topic is elsewhere in this PDF - see the table of contents.

  An alternative method to achieve the permanent delete is to delete views from the "**Deleted Views**" folder. When you confirm a delete from "**Deleted Views**", the view is deleted permanently.

  This pattern is not affected by the fact that if a view is stored in the "**Deleted Views**" folder that view is also listed in the "**All Views**" folder. Deleting a view from the "**Deleted Views**" folder also deletes the view from the "**All Views**" Folder.
- **View folders** cannot be deleted if they contain any views.

  If you attempt to delete a view folder that contains views, a window appears named "**Delete View Folder**". This window states that the delete cannot proceed because there are still views in that view folder.

  Delete all views in that view folder and repeat the delete of this view folder.

  If the view folder is empty and is the default view folder for any users, a window appears named "**View Folder dependencies**". This lists the users where this view folder is their default view folder. Click **OK** to proceed with the delete of the view folder, and click **Cancel** to avoid the delete.

Procedure

1. Ensure you are deleting your metadata items in the correct order, which is as follows:
   a. Views, users
   b. Control records, view folders, lookup paths, groups
   c. Logical records
   d. Logical files, global fields
   e. Physical files
   f. User-exit routines

   The above order avoids unnecessary error messages.
2. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.

3. Click on an item in the Navigator to display the Metadata List. If the Navigator is not visible, click **Window -> Show -> Navigator**.
4. **Select one or more metadata items** in the Metadata List. A single item is selected by a left click. Hold down the control key and left click to select another item. To select a sequence of items, select the first item in the sequence, then hold the shift key and click the last item in the sequence.

   If the list is long, you can search the list. This is done by clicking in the Metadata List and pressing F3. For more about this searching, read task "**Searching lists of metadata**", which is also in this Administration Guide.
5. Click or press the **Delete** key.
6. A window displays "This action will delete the selected XXX" (where XXX is the type of metadata item you selected). Click **OK** to proceed with the delete. Click **Cancel** to avoid any delete.
7. You may see more message windows. These windows either ask for confirmation of a delete or display reasons why a metadata item cannot be deleted. Depending on the situation, you have a choice to confirm a delete, skip a delete or cancel all remaining deletes.

   All messages for this topic are listed in topic "**Deleting metadata messages**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
8. To fix any problems, see the messages topic discussed in the previous step, and see also the text under "**About this task**" above. Once the problems are fixed, repeat the delete of the metadata item(s).

What to do next

Once the delete completes, the metadata item(s) will only appear in any existing backups (for example, XML files) - see task "**Exporting metadata**". This topic is elsewhere in this PDF - see the table of contents.

Empty "Deleted Views" folder

Before you begin

Ensure you know the following:

- You have **checked the folder "Deleted Views"** in the relevant environment and confirmed that all views can be deleted permanently.

About this task

This task describes how to delete all views in the folder "**Deleted Views**". See also topic "**Deleting metadata**".

Before delete of view, you may consider taking a backup - see task "**Exporting metadata**". This topic is elsewhere in this PDF - see the table of contents.

Instead of emptying the entire folder, you can click on the "**Deleted Views**" folder in the Navigator, and highlight each view and click . That method allows deleting only selected views in that folder. This topic is about deleting all views in that folder.

This task is for system and environment administrators only.

For an introduction to views, see topic "**Views overview**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Views are placed in folder "**Deleted Views**" in the topic "**Deleting metadata**". That topic is elsewhere in this PDF - see the table of contents.

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. Under **Administration**, click **Empty Deleted Views Folder**.
3. A window appears named "**Confirm deletion**". Click **OK** to proceed with the delete of views in that folder. Click **Cancel** to avoid any deletes.

What to do next

The deleted views cannot be recovered. If more views are placed in the folder "**Deleted Views**" then repeat this topic when those views can be permanently deleted.

Exporting metadata

Before you begin

It is essential that you read topic "**Export metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Only certain types of metadata can be exported. The types are:

- Logical file,
- Logical record,
- Lookup path,
- Physical file,
- View.

Ensure you know the following:

- The **environment** that owns the metadata to be exported.
- The **item(s)** to be exported. This includes choices such as **active or inactive examples** of logical records, lookup paths and views.
- A **folder** where the exported XML files are stored in sub-folders for each type.

About this task

Use this topic to export metadata components from WE into XML files. These XML files are potentially a backup that can be imported back into WE at another time. This screen outputs a separate XML file for each component exported.

System and environment administrators can always perform this task.

General users can perform this task if the **group selected during login** has at least **Read** rights for the components to be exported and for any related components in that environment. In particular, to export views a general user must have read rights to the view folders where any views are stored. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading '**About this task**" above.
2. Under **Administration** or **Components**, click **Export...**
3. Select an **Environment** from the drop down box. System administrators can choose from all environments. Environment administrators can only choose an environment where the group chosen during login provides environment administrator access. General users can choose from the environments that the **group selected during login** has access to.
4. Select a **Component Type** from the drop down box.
5. Wait for the table of **Component(s)** to be populated. System and environment administrators can see all the components of the selected type in that environment. For general users, the only components listed are those components where the group has read or modify or delete rights.
6. For component types of **Logical Record, Lookup Path and View**, further refine the list of components by **any choice of buttons** at the left of the list for **Active, Inactive or Both**. The buttons for Active, Inactive and Both do not appear for other values of Component Type.
7. **Sort** the list of "**Component(s)**" by clicking on any of the column headings. **Reverse the sort order** by clicking again on that heading. In particular, if the Component Type is "View" then the columns include "**View Folder Id**" and "**View Folder Name**". Sorting by these columns allows the views in a view folder to be listed together.
8. Select components to export by any of the following methods:
   a. **Tick (or untick)** individual components in the Select column.
   b. **Search the list,** if the list is long. This is done by clicking in the components list and pressing F3. For more about this searching, see task "**Searching lists of metadata**". Once a component is found, **tick (or untick)** the component(s) in the Select column.
   c. Click **Select All** or **Deselect All** as required.
9. If required, modify the **Location** field. If you type a new folder name that does not exist, this is created when you perform the next step. Alternatively, click **Browse** to select an existing folder. When you perform the next step, the folder you specify in **Location** is automatically given a sub-folder named for the Component Type. That sub-folder is where the XML file is stored.
10. Click **Export**. If this button is grey, ensure at least one component above is selected.

    If you require more help on this screen, see the screen help topic. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Export Utility screen help**" . To close the help, click X inside the "**Help**" tab.
11. A value in the **Result** column of "**Pass**" indicates that the folder for **Location** now has a sub-folder for the **Component Type** and an XML file exported for that item. Each XML file in that sub-folder is named **componentName[id[.xml**.

    The **Result column** shows if any errors affected the export of the XML file for each component. The errors may be caused by the general user not having read rights to a component. Errors may also be caused by a system input/output error. **Click on the row for a component** to see any error messages in the **Errors section** on the right.

See the errors topic for more details on errors. For the errors topic press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Export Utility errors**" . To close the help, click X inside the "**Help**" tab.

What to do next

After the above is complete, use Windows Explorer to go to the **folder given in the Location field.** This folder has sub-folders for each Component Type that has an XML file exported. The XML files can be viewed outside WE.

The XML files can be used as backups or to import metadata to a different environment in WE.

For more details, see these topics:
- "**Import metadata overview**" for a detailed understanding of import.
- "**Importing metadata**" for instructions on how to perform an import.
- "**XML structure for metadata overview**" for details of the XML files produced by export.

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Finding all environments for a particular a metadata item name

Before you begin

Ensure you know the name and type of a specific metadata item.

About this task

This task shows all the environments that contain a particular metadata item name. This is useful when planning to update or delete a metadata item, because the same action may be necessary for the same item name in other environments.

Procedure

1. Click "**Reports -> Environment Checker...**".
2. Select an **environment** from the drop down list.
3. Select a **component type** from the drop down list.
4. If the component type is **LR Field**, the screen displays radio buttons for "**Show All LR Fields**" and "**Show LR Fields only from the following LR**". There is also a drop down list below the second radio button.
   - The radio button "**Show All LR Fields**" changes the drop down list "**Component**" to show every LR (Logical Record) field in the environment selected above.
   - The radio button "**Show LR Fields only from the following LR**" allows choosing one logical record from the drop down list immediately below. This changes the drop down list "**Component**" to show only the LR fields from the selected logical record.
5. Select a particular metadata item from the drop down list "**Component**". Optionally, **right** click any value already in the field "**Component**" and select "**Open Editor**". This opens the editor screen for that component. If "Open Editor" is grey then the editor is not available for that field.

6. Click **Check** to view the Environment Checker Report for this metadata item. The report is shown at right under the heading "Components in Environments".
7. Optionally, you can save a copy of the report to a CSV file by using the section under the heading "Export". Provide a valid location (folder name) which includes the drive letter. If the folder is a new name, then the folder will be created when you click the Export button. The location specifies the path where the CSV file is stored. Optionally click **Browse...** to navigate to an existing folder. Once the location is appropriate, click the **Export** button to create a CSV file in the given location.

What to do next

If you exported a CSV file to a folder, then that file is immediately available in that folder.

For more on generating this report, see "**How do I generate an Environment Checker Report?**" To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Finding and replacing logic text

Before you begin

Ensure you know the following:

- The **component to find** in existing logic text. That component may be an existing metadata item, such as a lookup path, logical file, logical record, physical file or user-exit routine. That component may be a string of text such as a specific value of a product code. You must find all the views that have logic text with that existing component.

  If the component is the name of a metadata item, a simple method to find all the affected views is to use the **Dependency Checker Report**. For details, see topic "**How do I generate a Dependency Checker Report?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
- The **replacement component** for the logic text. The replacement may be a metadata item such as a lookup path, logical file, logical record, physical file or user-exit routine. The replacement may be a string of text such as a new value of a product code.
- The appropriate **environment** and **views** to search for the logic text to be changed. The views may be selected as one of:
  - All views for that **environment**
  - **Specific views chosen** from a list of all views in that environment
  - All views in one or more **view folders**

  The above selection of views can be **further filtered by date of creation or modification.** For example, select views created before a certain date.

About this task

Use this task to find certain logic text in views, and choose where to apply replacement logic text. Only system or environment administrators can perform this task.

For example, the logical record name for a particular logical file may change, so all references in logic text to the old logical record must change to the new logical record. This is a situation to use this task.

Another example is duplicating views for a different time period. Consider a set of views processing data using logic text that contains "**{Current_Quarter} = 01**". These views can be saved with new names (which copies the view), and the new views can have updated logic text "**{Current_Quarter} = 02**". This replacement logic text is only applied to the new (copied) views, and not to the old views. This example shows that replacement of logic text can apply to selected views, rather than to all views.

Procedure

1. Ensure you have all the information listed in **Before You Begin** above.
2. Do the following:
   - **EITHER** click **Administration -> Find/Replace Logic Text** (for system and environment administrators),
   - **OR** click **Components -> Find/Replace Logic Text** (for general users).
3. This screen has two parts: (A) search some group of views for an item of metadata or for some given logic text, and (B) update selected views with a replacement metadata item or replacement logic text. For detailed instructions see screen help topic "**Find/Replace Logic Text screen help**". For screen help press F1. Above **Related Topics** click to maximize the help and select the topic. To close the help, click X inside the "**Help**" tab.

What to do next

Any views that receive replacement logic text are updated to status "**Inactive**". To activate a view, see topic "**Modifying views**". Another method to activate views is topic "**Batch activate views**". These topics are elsewhere in this PDF - see the table of contents.

Finding screen help

About this task

This topic shows you how to find help for any screen in the SAFR Workbench. This applies to all users of the SAFR Workbench.

This topic assumes you are on a screen in the SAFR Workbench, and you require help with either of the following:

- **Screen help** - actions required on a screen and details of each field on that screen.
- **Errors** - all messages and a solution for each.

Procedure

1. For **screen help** (covering actions and fields on a screen), do the following on any screen:
   a. **Click F1**
   b. Above **Related Topics** click to maximize the help
   c. Click a **screen help** link and view the help.
   d. Click X inside the "**Help**" tab to close the help screen.

   An alternative method to find this help is to click or click **Help -> Help Content** or **Click F2**. On the screen that appears, click **Screens** and choose a screen topic.

This alternative method opens a new full screen window just for help. To close this window, click ☒ in the top right hand corner.

2. For **errors** help, do the following:
   a. **Click F1**
   b. Above **Related Topics** click ☐ to maximize the help
   c. Click an **errors** topic and view the help.
   d. Click X inside the "**Help**" tab to close the help screen.

   An alternative method to find errors help is to click ⓘ or click **Help -> Help Content** or **Click F2**. On the screen that appears, click **Troubleshooting** and choose an errors topic.

   This alternative method opens a new full screen window just for help. To close this window, click ☒ in the top right hand corner.

Importing metadata

Before you begin

It is essential that you read topic "**Import metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Only certain types of metadata can be imported. The types are:
- Logical file,
- Logical record,
- Lookup path,
- Physical file,
- View.

Ensure you know the following:
- The **target environment** to receive the metadata to be imported.
- The **XML file(s)** to be imported.
- The **folder(s)** containing the XML file(s).

About this task

Use this screen to import metadata components from XML files to the SAFR Workbench.

System and environment administrators can always perform this task. General users can open the screen "Import Utility" but cannot select a target environment, so the screen is not functional.

Procedure

1. Ensure you are logged into the **target environment** to receive the imported components. You must have the **appropriate rights**. For details of rights, see heading '**About this task**" above.
2. Under **Administration**, click **Import...** General users look under **Components**, and click **Import...** and see the same screen. General users cannot select a target environment on that screen.

3. Select a **Target Environment** from the drop down box. System administrators can choose any environment. Environment administrators can choose from those environments where the **group selected during login** has administrator access.
4. Select a **Component Type** from the drop down box.
5. If the **Component Type** is "View" then you can optionally **select a View Folder** from the drop down list. This limits the views listed to those in the given View Folder.
6. If required, modify the **Archive Folder** field. Alternatively, click **Browse** to select a folder. The objective is for the Archive Folder field to specify a folder that contains relevant XML files to be imported.
7. Wait a moment. The table of **File(s)** is populated. This table lists XML files named by the component name and ID that can be imported using that file. If no files appear, check that you have selected the correct folder and that the folder does contain XML files for components of the correct Component Type.
8. Select files to import by any of the following methods:
   a. **Tick (or untick)** individual files in the Select column.
   b. Click **Select All** or **Deselect All** as required.
9. In most situations, the field "**Replace IDs**" is blank. Tick this field if you require that the ID numbers in the XML file are ignored and new ID numbers created for the items imported.

   For more about the field "**Replace IDs**" read the sections about "Ideal situations" in topic "**Import metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".
10. Click **Import**. If this button is grey, ensure at least one file above is selected.

    If you require more help on this screen, see the screen help topic. For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Import Utility screen help**" . To close the help, click X inside the "**Help**" tab.
11. If you are attempting to import a component that already exists in the target environment, a message appears giving you a choice of OK or Cancel. Click **OK** to proceed with the import and overwrite the existing component. Click **Cancel** to ensure no import occurs.
12. If you are attempting to import a component with an ID number that is higher than anything in the target environment, a message appears giving you a choice of OK or Cancel. Click **OK** to proceed with the import and change the ID number as appropriate for the target environment. Click **Cancel** to ensure no import occurs.
13. A value of "**Pass**" in the **Result** column means the import is complete.

    The **Result column** shows if any errors affected the import of that XML file. A value of '**Fail**" in the Result column means the import did not occur. **Click on that row** to see any error messages in the **Errors section** at right.

    WARNING: this screen stops processing when the first error is found and displays only that error. If an import has multiple errors, then multiple attempts are necessary to find and fix all the errors.

    See the errors topic for more details on errors. For the errors topic press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Import Utility errors**" . To close the help, click X inside the "**Help**" tab.
14. The WE log file contains data about imports performed in this session.

    For an example see topic "**Import metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

If an import completes, the imported metadata is ready for immediate use.

Migrating metadata

Before you begin

It is essential that you read topics "**Migrate metadata overview**" and "**Metadata - advanced overview**" before you perform this task. To find those topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

The Migration Utility provides a method to copy some metadata from a source environment to a target environment. Both environments must be in the same SAFR Database.

You select a "main" item to be migrated. There are some "related items" for that main item.

The name and ID number stay the same for the main and related items migrated to the target environment. There can be an exception when the main item is a view folder.

Note that if an ID number for a certain type of item already exists in the target environment, then that existing item can be overwritten in some cases.

Only certain types of metadata can be the main item for the Migration Utility. A main item must be one of these types:
- Control record,
- Global field,
- Logical File,
- Logical Record,
- Lookup Path,
- Physical File,
- User-exit routine,
- View,
- View Folder.

Ensure you know the following:
- The **source environment** containing metadata that you want to migrate.
- The **target environment** to receive the migrated metadata.
- The **main** item in the source environment to be migrated.
- The **related** items for that main item.
- Whether the ID numbers of the main and related items **already exist** in the target environment.

It is recommended to backup in the target environment the red item(s) on the "Confirm Migration" screen when it first appears. On that screen you need to note the item types, names and ID numbers of the red items, click Cancel and perform the backups. When the backups are complete, repeat the migration and click OK on the same screen.

One way to backup is using topic "**Exporting metadata**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

About this task

You need the appropriate security authority in both the source and target environments to perform migration. See topic "**Metadata - advanced overview**" and look in the section "Copy using Migration". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged in with **appropriate rights**. For details of rights, see heading '**About this task**" above.
2. Under **Administration** or **Components**, click **Migrate...**
3. Select a **Source Environment** from the drop down box. System administrators can choose from all environments. Environment administrators can only choose an environment where the group chosen during login provides environment administrator access. General users can choose from the environments that the login group has access to.
4. Select a **Target Environment** from the drop down box. System administrators can choose from all environments. Environment administrators choose from the environments where the login group has administrator access. General users choose from the environments where the **login group has the "Migrate In" run permission**. If the drop down box is grey, ensure a source environment is selected. If so, press the Tab key.
5. Select a **Component Type** from the drop down box. If the drop down box is grey, ensure the fields above are selected. If so, press the Tab key.
6. Wait for the table of **Component(s)** to be populated. System and environment administrators can see all the components of the selected type in that environment. For general users, the only components listed are those components where the group has at least read rights.

   You must select one component to migrate to the target environment.

   Sort the list of "**Component(s)**" by clicking on any of the column headings. **Reverse the sort order** by clicking again on that heading.

   If you require more help on this screen, see the screen help topic. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Migration Utility screen help**" . To close the help, click X inside the "**Help**" tab.
7. If the component selected is a view or view folder, select a view folder in the drop down box for **Target View Folder**. This view folder stores the selected view(s) in the target environment after migration completes.
8. To perform a minimum migrate, **remove the tick** in the box "**Migrate Related**". To perform a maximum migrate, **ensure a tick** in the box "**Migrate Related**".
9. Click **Migrate**. If this button is grey, ensure at least one component above is selected or press the Tab key.

   To show the progress of the migration, text displays below the Navigator:

If you require more help on this screen, see the screen help topic. For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Migration Utility screen help**" . To close the help, click X inside the "**Help**" tab.

10. There is at least one message box. The following messages may appear:

Message	Notes
Migration Complete. See the Result column	Click OK to clear the message box. The word "Pass" appears in the Result column for this migration.
Confirm Migration. The following component(s) will be migrated. Red items marked with '*' exist in the target environment and will be overwritten.	It is recommended to backup in the target environment the red item(s) on this screen before proceeding with the migration. You need to note the items, cancel this migration, take the backup and then return to this migration.

See the messages topic for more details on messages on this screen. For the messages topic press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Migration Utility messages**" . To close the help, click X inside the "**Help**" tab.

11. The WE log file contains data about migrations performed in this session.

For an example see topic "**Migrate metadata overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

The migrated (copied) metadata items are ready for immediate use in the target environment.

Modifying control records

Before you begin

Ensure you know the following:

- The **environment** for the control record.
- The name of the **existing control record** that needs update.
- The new values required in the control record for the fields:
  - Maximum Extract File Number,
  - First Fiscal Month,
  - Beginning Period,

– Ending Period.

About this task

Use this topic to modify control records. Only system administrators and environment administrators can perform this task.

To delete a control record, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator or environment administrator** in the relevant environment.
2. In the Navigator, click **Control Records**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the control record that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Modify values in the fields. For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Edit Control Record screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Edit Control Record errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the control record is ready for immediate use.

Modifying environments

Before you begin

Ensure you know the following:
- The name of the **environment** that needs update.
- A possible **new name** for the environment.
- A possible **comment** to make.
- Any requirements to **enable or disable archiving** in the new environment.

About this task

Use this topic to modify the environment record itself (but not any metadata inside the environment). Only system and environment administrators can perform this task.

An entire environment cannot be copied in a single operation. The metadata inside an environment can be copied to another environment using task "**Migrating metadata between environments**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

To copy metadata inside one environment, see task "**Copying metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

To clear all the metadata inside an environment, see task "**Clear environment**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete an environment record itself, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged in with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. In the Navigator, click **Environments**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the environment that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit Environment screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Edit Environment errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the environment is ready for immediate use.

To see a report on environment security, use one of these topics:
- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Modifying global fields

Before you begin

Ensure you know the following:
- The **environment** for the global field.
- The name of the **existing global field** in that environment to modify.
- The **new values required** for the global field.

About this task

Use this topic to modify a Global Field. Only system administrators or environment administrators can perform this task.

To delete a global field, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system or environment administrator** in the relevant environment.
2. In the Navigator, click **Global Fields**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the global field that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Modify values in the fields. For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Edit Global Field screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click  (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Edit Global Field errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the global field is ready for immediate use in a logical record or view.

Modifying groups

Before you begin

Ensure you know the following:
- The name of the **existing group** to modify.
- A **new name** for that group.

About this task

Use this topic to modify group names. Only system administrators can perform this task.

To change the membership, see topic "**Modifying group membership**". To change the permissions in the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**". These topics are elsewhere in this PDF - see the table of contents.

To delete a group, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment.
2. In the Navigator, open **Administration** and click **Groups**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the existing group name. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit Group screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Edit Group errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the new group name is ready for immediate use.

To see a report that contains all groups in that environment, use one of these topics:
- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports on metadata**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Modifying group membership

Before you begin

Ensure you know the following:
- The **name** of the existing group.
- The changes to the membership of that group.

About this task

Use this topic change the users who are members of a group. Only system administrators can perform this task.

Membership of groups affects security - see topic "**WE Security overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment.
2. Click **Administration -> Group Security -> Membership...**.

3. In the **Group Membership** window, **select a group** from the drop down box. Sort the list by clicking on "id" or "name" in the header of the list. Reverse the sort order by clicking again on "id" or "name" in the header.
4. The choices are as follows:
   a. To add users, click **Add**. Tick the relevant users and click OK. If the list of users is long, you can search the list. This is done by clicking in the Metadata List display and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
   b. To remove users, tick the relevant users and click **Remove**. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read topic "**Searching lists of metadata**".
   c. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Group Membership screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Modify Group Membership errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the group is ready for immediate use.

To see a report that contains all groups in that environment, use one of these topics:

- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports on metadata**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

To modify permissions for the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**". These topics are elsewhere in this PDF - see the table of contents.

Modifying group permissions by environment

Before you begin

A system administrator can perform all of this task. An environment administrator can perform most parts of this task.

Performing this task affects security - see topic "**WE Security overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Use this topic change the permissions for a combination of an environment and an associated group. The new permissions apply to all members of the associated group.

Ensure you know the following:
- The name of the **environment**.
- The name of the **group** associated with that environment.
- The **changes to the permissions** for that group.

About this task

See the screen help topics and the messages topic for more detailed instructions on this task. For example, the screen help topics provide more instructions on searching the lists of groups that are displayed in this task. The messages topic explains any error or information messages that are displayed. The screen help topics are named by a combination of the screen and the sections on the screen.
- **Group Permissions By Environment (Groups, Associated Environments sections) screen help**
- **Group Permissions By Environment (Component Security section) screen help**
- **Group Permissions By Environment messages**

To display any of the above topics you must have completed Step 2 below. Once you are on the "Group Permissions By Environment" screen, press F1. Above **Related Topics** click to maximize the help and select a topic. To close the help, click X inside the "**Help**" tab.

Procedure

1. Ensure you are logged into the SAFR Workbench as an environment administrator or a system administrator.
2. Click **Administration -> Group Security -> Permissions -> By Environment...**
3. In the **Environments** section, **select an environment** from the drop down box. System administrators can choose from a list of all environments. Environment administrators can choose from a list of environments where they have administrator access provided by the group selected during login.
4. The choices in the **Associated Groups section** are as follows:
   a. The **Associated Groups section** lists the groups currently associated with the environment. Click in the list of groups to refresh the display. **Only system administrators can change the details of the groups** listed in this section. Environment administrators can only highlight a group in order to make changes in the Component Security section below.
   b. To add a group to the list, system administrators click **Add** to display the window "Select components to be associated". Tick the groups to add, and click OK.
   c. To remove a group from the list, system administrators **highlight a group**, and click **Remove**. If the Remove button is grey, ensure a group is highlighted.
   d. System administrators decide which groups have **administrator access** to the environment by ticking or un-ticking the box in the Admin column.
   e. See the topic "**Group Permissions By Environment (Groups, Associated Environments sections) screen help**" for more help on Step 4. To find this topic see "**About this task**" above.
   f. See the topic "**Group Permissions By Environment messages**" for help on messages that display. To find this topic see "**About this task**" above.
5. Highlight a group listed in the **Associated Groups section** of this screen in order to make changes in the Component Security section. If more than group

is highlighted, then the **first** group highlighted is the group for the steps below and all the other highlighted groups are ignored.

6. In the Component Security section "**Permissions**" tab, tick or untick the rights listed.
7. The choices in the "**Edit Rights**" tab are:
   a. In the Component Security section "**Edit Rights**" tab, select a **component type** from the drop down box and use the buttons like **Add** and **Remove** to list actual components under **Access Permitted**.
   b. Use the **Read, Modify and Delete columns** or the check boxes above to give access or remove access to those actual components.
   c. See the topic "**Group Permissions By Environment (Component Security section) screen help**" for more help on Steps 5, 6 and 7. To find this topic see "**About this task**" above.
   d. See the topic "**Group Permissions By Environment messages**" for help on messages that display. To find this topic see "**About this task**" above.
8. When all changes are complete for this combination of group and environment,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.
9. If required, return to Step 5 to select a new group, or return to Step 3 to select a new environment. If you have finished all work on group permissions, click X to close the "**Group Permissions By Environment**" screen.

What to do next

After the permission changes are complete, the updated group(s) are ready for immediate use.

To see a **report on environment security** that contains all groups associated with an environment, see one these topics:
- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports on metadata**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Modifying group permissions by group

Before you begin

You must be a system administrator.

Performing this task affects security - see topic "**WE Security overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Use this topic change the permissions for a combination of a group and an associated environment. The new permissions apply to all members of the group.

Ensure you know the following:
- The name of the **group**.
- The name of an **environment** associated with that group.

- The **changes to the permissions** for that group.

About this task

See the screen help topics and the messages topic for more detailed instructions on this task. For example, the screen help topics provide more instructions on searching the lists of environments that are displayed in this task. The messages topic explains any error or information messages that are displayed. The screen help topics are named by a combination of the screen and the sections on the screen.

- **Group Permissions (Groups, Associated Environments sections) screen help**
- **Group Permissions (Component Security section) screen help**
- **Group Permissions messages**

To display any of the above topics you must have completed Step 2 below. Once you are on the "Group Permissions" screen, press F1. Above **Related Topics** click to maximize the help and select a topic. To close the help, click X inside the "**Help**" tab.

Procedure

1. Ensure you are logged into the SAFR Workbench as a system administrator.
2. Click **Administration -> Group Security -> Permissions -> By Group...**
3. In the **Groups** section, **select a group** from the drop down box.
4. The choices are:
   a. The **Associated Environments section** lists the environments currently associated with the group. Click in the list of environments to refresh the display.
   b. To add an environment to the list, click **Add** to display the window "Select components to be associated". Tick the environments to add, and click OK.
   c. To remove an environment from the list, **highlight an environment**, and click **Remove**. If the Remove button is grey, ensure an environment is highlighted.
   d. Decide which environments where the group has **administrator access** by ticking or un-ticking the box in the Admin column.
   e. See the topic "**Group Permissions (Groups, Associated Environments sections) screen help**" for more help on Step 4. To find this topic see "**About this task**" above.
   f. See the topic "**Group Permissions messages**" for help on messages that display. To find this topic see "**About this task**" above.
5. Highlight an environment listed in the **Associated Environments section** of this screen. If more than environment is highlighted, then the **first** environment highlighted is the environment for the steps below and all the other highlighted environments are ignored.
6. In the Component Security section "**Permissions**" tab, tick or untick the rights listed.
7. The choices in the "**Edit Rights**" tab are:
   a. In the Component Security section "**Edit Rights**" tab, select a **component type** from the drop down box and use the buttons like **Add** and **Remove** to list actual components under **Access Permitted**.
   b. Use the **Read, Modify and Delete columns** or the check boxes above to give access or remove access to those actual components.

c. See the topic "**Group Permissions (Component Security section) screen help**" for more help on Steps 5, 6 and 7. To find this topic see "**About this task**" above.

d. See the topic "**Group Permissions messages**" for help on messages that display. To find this topic see "**About this task**" above.

8. When all changes are complete for this combination of group and environment,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.
9. If required, return to Step 5 to select a new environment, or return to Step 3 to select a new group. If you have finished all work on group permissions, click X to close the "**Group Permissions**" screen.

What to do next

After the permission changes are complete, the updated group(s) are ready for immediate use.

To see a **report on environment security** that contains all groups associated with an environment, see one these topics:
- FAQ topic "**How do I generate an Environment Security Report?**"
- Task "**Generating reports on metadata**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Modifying logical files

Before you begin

Ensure you know the following:
- The **environment** for the logical file.
- The name of the **existing logical file** in that environment to modify.
- The **new values** required for the logical file.

About this task

Use this topic to modify logical files. The physical files to be associated must already exist in the SAFR Workbench. The logical records may not exist yet and those associations are setup when the relevant logical records are created or modified.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has **Modify or Delete** rights to the particular logical file in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:
- "**Logical Files overview**"

- "**Logical Records overview**"
- "**Physical Files overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete a logical file, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading “**About this task**" above.
2. In the Navigator, click **Logical Files**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the logical file that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Modify values in the fields. Click **Add** or **Remove** to change the association between this logical file and any physical files with the same record format. These lists of associated items can be searched - see screen help. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit Logical File screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For errors or messages on this screen, see topic "**Edit Logical File errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the logical file is ready for immediate use.

Modifying logical records

Before you begin

Ensure you know the following:
- The **environment** for the logical record.
- The **fields to update** in the logical record.

About this task

Use this topic to modify logical records. The logical records are associated with logical files which must already exist in the SAFR Workbench.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has **Modify or Delete** rights to the particular logical record in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:

- "**Global Fields overview**"
- "**Logical Files overview**"
- "**Logical Records overview**"
- "**Physical Files overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete a logical record, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. In the Navigator, click **Logical Records**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the logical record that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. On the "**LR fields**" tab, create or modify fields for the logical record. Screen help provides comprehensive instructions about this. For screen help on any of the tabs, press F1. Above **Related Topics** click to maximize the help and select one of the screen help topics. To close the help, click X inside the "**Help**" tab.
5. On the "**LR properties**" tab, enter or modify values in the fields. For screen help on any of the tabs, press F1.
6. On the "**Associated Logical Files**" tab, add or remove logical files associated with this logical record. See screen help for comprehensive instructions. For screen help on any of the tabs, press F1.
7. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   For messages on this screen, see topic "**Edit Logical Record errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the logical record is ready for immediate use.

To see a **report on selected logical records**, use one of these topics:

- FAQ topic "**How do I generate a Logical Record Report?**"
- Task "**Generating reports on metadata**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

Modifying physical files

Before you begin

Ensure you know the following:

- The **environment** for the physical file.
- The name of the **existing physical file** in that environment to modify.
- The **new values required** for the physical file.

About this task

Use this topic to modify physical files. The physical files are associated with logical files when you create or modify logical files.

System and environment administrators can always perform this task. General users can create physical files if the **group selected during login** has **Modify or Delete** rights to the particular physical file in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

The following topics are useful introductions:

- "**Physical Files overview**"
- "**Common Key Buffers overview**"
- "**Pipes overview**"
- "**Tokens overview**"
- "**Logical Files overview**"
- "**Logical Records overview**"

To find these topics in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete a physical file, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. In the Navigator, click **Physical Files**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the physical file that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Enter or modify values in the fields. Screen help gives comprehensive instructions. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit Physical File screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,
   - **EITHER** click (the save icon),

- **OR** select **File, Save**,
- **OR** press **Ctrl+S**.

For errors or messages on this screen, see topic "**Edit Physical File errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the physical file is ready for immediate use in a logical file.

Modifying users

Before you begin

Ensure you know the following:
- The **name** of the user.

About this task

Use this topic to modify users. Only system administrators can perform this task.

Note that the rights for a general user come from a group the user chooses during login to SAFR.

To change the groups the user is a member of, use topic "**Modifying group membership**". To change the permissions in the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**". These topics are elsewhere in this PDF - see the table of contents.

To delete a user, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the SAFR Workbench as a **system administrator** in any environment. To modify the system administrator account itself, select **File -> Update User Profile** and go to step 4.
2. In the Navigator, open **Administration** and click **Users**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the user that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit User screen help**". To close the help, click X inside the "**Help**" tab.
5. If a default environment, default group or default view folder is assigned and is no longer required, then click the **Refresh defaults** button at right, or press Alt+F6.
6. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,

- **OR** press **Ctrl+S**.

For errors or messages on this screen, see topic "**Edit User errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the user may not be ready for immediate use. Make the user a member of their default group or at least one group using topic "**Modifying group membership**". To change the permissions in the group, see topics "**Modifying group permissions by group**" and "**Modifying group permissions by environment**".

These topics are elsewhere in this PDF - see the table of contents.

Modifying user-exit routines

Before you begin

Ensure you know the following:

- The **environment** for the user-exit routine.
- The name of the **existing user-exit routine** in that environment to modify.
- The **new values required** for the user-exit routine.

About this task

Use this topic to modify user-exit routines.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has **Modify or Delete** rights to the particular user-exit routine in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

For an introduction to user-exit routines, see topic "**User-exit routines overview**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete a user-exit routine, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading "**About this task**" above.
2. In the Navigator, click **User-Exit Routines**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the user-exit routine that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click ☐ to maximize the help and select topic "**Edit User-Exit Routine screen help**". To close the help, click X inside the "**Help**" tab.

5. When all fields are complete,
   - **EITHER** click (the save icon),
   - **OR** select **File, Save**,
   - **OR** press **Ctrl+S**.

   Help with error messages is available in topic "**Edit User-Exit Routine errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the user-exit routine is ready for immediate use.

Modifying view folders

Before you begin

Ensure you know the following:
- The **environment** for the view folder.
- The name of the **existing view folder** in that environment to modify.
- The **new name** for the view folder.

About this task

Use this topic to modify View Folders.

System and environment administrators can always perform this task. General users can perform this task if the **group selected during login** has **Modify or Delete** rights to the particular view folder in that environment. See your system administrator if you require more rights.

General users need to be aware of help topic "**What metadata do I want to see?**" To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

For an introduction to user-exit routines, see topic "**View folders overview**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

To delete a view folder, see task "**Deleting metadata**". To find this topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Procedure

1. Ensure you are logged into the relevant environment with **appropriate rights**. For details of rights, see heading “**About this task**" above.
2. In the Navigator, open **View Folders**. If the Navigator is not visible, click **Window -> Show -> Navigator**.
3. In the Metadata List, double click on the view folder that needs update. If the list is long, you can search the list. This is done by clicking in the Metadata List table and pressing F3. For more about this searching, read task "**Searching lists of metadata**".
4. Enter or modify values in the fields. For screen help press F1. Above **Related Topics** click to maximize the help and select topic "**Edit View Folder screen help**". To close the help, click X inside the "**Help**" tab.
5. When all fields are complete,

- **EITHER** click (the save icon),
- **OR** select **File, Save**,
- **OR** press **Ctrl+S**.

Help with error messages is available in topic "**Edit View Folder errors**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

What to do next

After the above is complete, the view folder is ready for immediate use.

The Refresh Navigator icon is used to ensure the View Folder list in the Navigator contains current data. If this icon is grey, dick on the "**View Folders**" node in the Navigator to activate this icon. When active, click on this icon or press F4 to refresh the Navigator with current view folder data. Alternatively, double click on "**View Folders**" to refresh the Navigator in one action.

Searching lists of metadata

About this task

All users of the SAFR workbench can perform this task.

Procedure

1. This topic assumes you are on a screen in the SAFR Workbench that has a list of metadata items. **Click in that list of metadata.**
2. Start the search as follows:
   - **EITHER** press **F3**. Nothing happens if searching is not available in the context.
   - **OR** click on the **search icon** in any location this search icon can be found. There is always a search icon on the Workbench toolbar, and some dialog boxes contain a search icon for easy access. This icon is grey if searching is not available in the context.
   - **OR** select **File, Search**. This menu item is grey if searching is not available in the context.
3. In the screen "**Search Metadata Component**", do the following:
   a. Choose the type of search you require: either "**By ID**" or "**By Name**".
   b. In the field "**Search text**" type either the ID or the first characters in the metadata component name.
   c. Click OK to start the search.
4. If the component is found, then you are returned to the metadata list with that component highlighted.

What are the keyboard shortcuts?

01 Summary of this topic

The sections in this topic are as follows:
- “10 Shortcuts: All workbench screens” on page 77
- “12 Shortcuts: Navigator” on page 81
- “20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)” on page 81

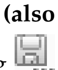
- "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84
- "32 Shortcuts: New/Edit View screen (View Properties tab)" on page 87
- "80 Shortcuts: Logic Text screens" on page 88
- "90 Shortcuts: Edit User screen" on page 89

10 Shortcuts: All workbench screens

The shortcuts below apply to all screens in the workbench (WE) except the SAFR Connection screen and the SAFR Login screen.

Shortcut	Notes
Alt + underlined letter	Most WE screens have underlined letters in menus, tabs, fields and buttons. **Press Alt and the underlined letter** to jump to that location. In most cases, an underlined letter is unique. On those Editor screens where the same letter is underlined in different locations, the combination will jump between those locations on that screen. If the same combination is shared between the menu and an Editor screen, then this combination goes to the Editor screen. To reach the menu, press Alt by itself, release it and then press Alt with the underlined letter.
Alt	Jump to the **File** menu.
Arrow down	Behavior depends on context. Arrow down has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Arrow down depends on the position of the cursor, as follows: • In a multi-line text field (such as Comments for a Control Record), Arrow down **jumps to the line below**. If already on the lowest line, then Arrow down has no effect. • In a list of values Arrow down **highlights the next value below**. If the lowest value in the list is highlighted, then Arrow down has no effect. • In other types of fields, Arrow down has no effect.
Arrow left	Behavior depends on context. Arrow left has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Arrow left depends on the position of the cursor, as follows: • In a text or numeric field such as a Name field, Arrow left **jumps one character to the left**. In a multi-line text field (such as Comments for a Control Record) Arrow left may jump to the right hand end of the line above. If already on the leftmost character on the first line, then Arrow left has no effect. • In a list of values, Arrow left **highlights the next value above**. If already on the highest value in the list, then Arrow left has no effect. • In other types of fields, Arrow left has no effect.

Shortcut	Notes
Arrow right	Behavior depends on context. Arrow right has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Arrow right depends on the position of the cursor, as follows: • In a text or numeric field such as a Name field, Arrow right **jumps one character to the right**. In a multi-line text field (such as Comments field in a Control Record) Arrow right may jump to the left hand end of the line below. If already on the rightmost character on the last line, then Arrow right has no effect. • In a list of values Arrow right **highlights the next value below**. If the lowest value in the list is highlighted, then Arrow right has no effect. • In other types of fields, Arrow right has no effect.
Arrow up	Behavior depends on context. Arrow up has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Arrow up depends on the position of the cursor, as follows: • In a multi-line text field (such as Comments for a Control Record) Arrow up **jumps to the line above**. If already in the first line, then Arrow up has no effect. • In a list of values Arrow up **highlights the next value above**. If the highest value in the list is highlighted, then Arrow up has no effect. • In other types of fields, Arrow up has no effect.
Ctrl + C	**Copy selected text.** This copies the selected text, in preparation for a paste (see Ctrl + V lower in this table).
Ctrl + Shift + E	Switch to the Editor Area. A screen appears called "**Switch to Editor**", that lists all the Editor Area screens that are open. Select a screen and press Enter to switch to that screen. Other actions are available on this screen.
Ctrl + F6	Switch to the next Editor screen. After pressing Ctrl + F7, keep holding down the Ctrl key and release the F7 key to see a choice of all the Editor screens running. Arrow to the required item, and press Enter to jump to that selection.
Ctrl + Shift + F6	Switch to the previous Editor screen. After pressing Ctrl + F7, keep holding down the Ctrl key and release the F7 key to see a choice of all the Editor screens running. Arrow to the required item, and press Enter to jump to that selection.
Ctrl + F7	Switch to the next view (meaning Navigator, Metadata List or Editor Area). After pressing Ctrl + F7, keep holding down the Ctrl key and release the F7 key to see a choice of Navigator, Metadata List and all Editor Area. Arrow to the required item, and press Enter to jump to that selection.

Shortcut	Notes
Ctrl + Shift + F7	Switch to the previous view (meaning Navigator, Metadata List or Editor Area). After pressing Ctrl + F7, keep holding down the Ctrl key and release the F7 key to see a choice of Navigator, Metadata List and all Editor Area. Arrow to the required item, and press Enter to jump to that selection.
Ctrl + L	Display the **SAFR Login** screen. This keyboard shortcut achieves the same result as clicking **File -> Return to login...**.
Ctrl + M	**Maximize** the active screen - either the Editor Area, Navigator or Metadata List. Press again to undo the maximize action.
Ctrl + N	Create a **new** instance of the type of metadata currently selected in the Navigator. If the Navigator is highlighting a particular view folder, then this results in a **new view** screen. This keyboard shortcut achieves the same result as going to the Navigator, clicking on the **arrow beside**  (the new icon) on the toolbar and selecting the appropriate item.
Ctrl + O	**Open a view by id number**. The **Open View** screen appears. Type a view id number and click OK to open that view. This shortcut achieves the same result as selecting **File -> Open View**.
Ctrl + S	**Save** the current data. This shortcut achieves the same result as clicking  (the save icon) or selecting **File -> Save**.
Ctrl + Shift + S	**Copy Metadata (also called Save As)**. This shortcut achieves the same result as clicking  (the Save As icon) or selecting **File -> Save As**. This function requires that the Editor Area has a metadata item open in a window.
Ctrl + V	**Paste selected text.** You must have copied some text first (using Ctrl+C).
Ctrl + W	**Close** the current editor screen.
Ctrl + Shift + W	**Close all** editor screens.
Enter	Behavior depends on context. Enter has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Enter depends on the position of the cursor, as follows: • On a button, Enter **actions the button**. • In a multi-line text field such as Comments, Enter **jumps to a new line**. • In a list of values, Enter **accepts the currently highlighted value** as the value for this field. • In other fields, Enter has no effect.

Shortcut	Notes
F1	**Display screen sensitive help.** A window appears with help links for the screen you are on. The Editor Area must contain the active screen. This does not work in the Navigator or the Metadata List.
F2	**Display Help Content.** A full screen window appears with the entire online help for the workbench.
F12	**Activate** the Editor Area.
Shift + left click	To select a large number of components in sequence, select the first component and then **hold down Shift and select the last component**. All other components will be deselected when this occurs, so this should be the first action for a complex group of selections.
Shift + Tab	Behavior depends on context and is the reverse direction of the jumps given for "Tab" lower in this table. For example, in an Editor screen the Tab key jumps to the next field whereas Shift + Tab jumps to the previous field.
Spacebar	Behavior depends on context. Spacebar has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" on page 81 • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the behavior of Spacebar depends on the position of the cursor, as follows: • In a Name field, Spacebar results in an **underscore character (_)** since spaces are not permitted in names. • In other text fields such as Comments, Spacebar results in a **space character ( )**. • In a checkbox field, Spacebar **toggles between a tick and no tick**. • In other fields such as numeric fields or a list of values, Spacebar has no effect.

Shortcut	Notes
Tab	Behavior depends on context. The Tab key has special behavior on these screens: • "20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)" • "30 Shortcuts: New/Edit View screen (View Editor tab)" on page 84 On all other workbench screens, the Tab key jumps between screen objects, and hence depends on the individual screen. In general, the Tab key jumps between these screen objects: • **The editable fields in the current Editor screen**. For example, if the current Editor screen is Edit Control Record, the Tab key jumps from the Name field to Maximum Extract File Number and then to Comments, First Fiscal Month, Beginning Period and Ending Period. • **Buttons in the current Editor screen**. For example, if the current Editor screen is Edit Logical File, the Tab key can reach the Add button for Associated Physical Files. • **The New icon** in the toolbar. • **The Help icon** in the toolbar. • **The tab for the current Editor session**. For example, this may be the tab for Edit Control Record. • **If relevant, the screen tab for the current Editor session**. An example is the General tab on the Edit Lookup Path screen. Some Editor sessions do not have screen tabs, such as the Edit Control Record screen. • Back to the top of this list.

12 Shortcuts: Navigator

Shortcut	Notes
F4	**Refresh Navigator.** This key works only after clicking "**View Folders**" in the Navigator. If any other node is highlighted in the Navigator, F4 has no effect.

20 Shortcuts: New/Edit Logical Record screen (LR Fields tab)

Remember to also see section "10 Shortcuts: All workbench screens" on page 77.

When you first display the LR Fields tab for a logical record, you must enable the grid of cells before you can start to work on this screen. Enable the grid as follows:

- EITHER **click in any cell** in the grid,
- OR **press Arrow down, Arrow left or Arrow right**.

The rows with red text are sort keys.

Once the grid is enabled, the cells are always in one of two modes:

- EITHER in **Display mode** - the cell value is read only,
- OR in **Edit mode** - the cell value can be changed.

To **start Edit mode** in a cell, do one of the following:

- EITHER **left click** on the cell,
- OR press **Tab** enough times to reach the cell,
- OR **arrow** to the cell and press **Spacebar**.

To **end Edit mode** and return to Display mode in a cell, do one of the following:

- EITHER press **Enter** to accept all changes,
- OR press **Tab** to exit the cell and also accept all changes,
- OR press **Escape** to cancel all changes made to the cell.

The table of shortcuts for this screen is below:

Shortcut	Notes
Alt + Down	Move field down.
Alt + Insert	Add a blank row at the bottom.
Alt + Up	Move field up.
Arrow down	The behavior of Arrow down is as follows: • For a cell in Display mode, Arrow down jumps to the next cell below. In the lowest cell in the column, Arrow down has no effect. • For a cell with a list of values in Edit mode, Arrow down **highlights the next lower value**. If the lowest value in the list is highlighted, then Arrow down has no effect. • For a cell of any other type in Edit mode, Arrow down has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Arrow left	The behavior of Arrow left is as follows: • For a cell in Display mode, Arrow left jumps to the cell in the column immediately to the left. For a cell in the Field Id column, Arrow left has no effect. • For a cell with a list of values in Edit mode, Arrow left **highlights the next higher value**. If the highest value in the list is highlighted, then Arrow left has no effect. • For a cell of any other type in Edit mode, Arrow left has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Arrow right	The behavior of Arrow right is as follows: • For a cell in Display mode, Arrow right jumps to the cell in the same row immediately to the right. For a cell in the Comments column, Arrow right has no effect. • For a cell with a list of values in Edit mode, Arrow right **highlights the next lower value**. If the lowest value in the list is highlighted, then Arrow right has no effect. • For a cell of any other type in Edit mode, Arrow right has no effect. For a discussion of Display mode and Edit mode, see the text above this table.

Shortcut	Notes
Arrow up	The behavior of Arrow up is as follows: • For a cell in Display mode, Arrow up jumps to the next cell above. For a cell in the first row, then Arrow up has no effect. • For a cell with a list of values in Edit mode, Arrow up **highlights the next higher value**. If the highest value in the list is highlighted, then Arrow up has no effect. • For a cell of any other type in Edit mode, Arrow up has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Ctrl + C	**Copy the selected field.** This copies the current field, in preparation for a paste (see Paste Above or Paste Below see lower in this table).
Ctrl + F	**Find Field...** Displays a window **Find Field**. Type a field name and press OK. If found, the field is highlighted. If not found, a message appears.
Ctrl + V	**Paste Above**. Pastes a field above the currently highlighted row. You must have copied a column first (using Ctrl+C).
Ctrl + Shift + V	**Paste Below**. Pastes a field below the currently highlighted row. You must have copied a column first (using Ctrl+C).
Delete	**Delete** the currently highlighted field. This performs the same function as clicking
End	Go to the rightmost cell in the current row.
Enter	The behavior of Enter is as follows: • For a cell in Display mode, Enter has no effect. • For a cell in Edit mode, Enter **accepts the current value in that cell** and places that cell in **Display** mode. For a discussion of Display mode and Edit mode, see the text above this table.
Escape	For a cell in Display mode, Escape has no effect. For a cell in Edit mode, Escape **cancels all changes** made to that cell and places that cell in **Display** mode. For a discussion of Display mode and Edit mode, see the text above this table.
Home	Go to the leftmost cell in the current row.
Insert	Insert a new row above the current row. This performs the same function as clicking (insert field).
Page-down	Go to the bottom cell in this column.
Page-up	Go to the top cell in this column.
Shift + Tab	Jumps in the reverse direction given for "Tab" lower in this table.

Shortcut	Notes
Spacebar	For a cell in Display mode, Spacebar places the cell in **Edit** mode. For a cell in Edit mode, the behaviour of Spacebar is as follows: • In a text field, Spacebar results in a **space character ( )**. • In a checkbox field, Spacebar **toggles between a tick and no tick**. Note that some cells have a checkbox that cannot be edited, such as the Signed field for a row that is type Alphanumeric. • In other fields such as numeric fields or a list of values, Spacebar has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Tab	Once the grid is enabled, the behavior of the Tab key is as follows: • In a cell in Edit mode, the Tab key **accepts the current value of that cell, places that cell in Display mode and jumps to the next cell to the right in that row and places that cell in Edit mode**. In the Comments column, the Tab key jumps to the first cell in the row underneath. In the Comments column for the last row, the Tab key creates a new row underneath. • In a cell in Display mode, the Tab key **jumps to the next cell to the right in that row and places that cell in Edit mode**. In the Comments column, the Tab key jumps to the first cell in the row underneath. In the Comments column for the last row, the Tab key creates a new row underneath. For a discussion of enabling the grid, Display mode and Edit mode, see the text above this table.

30 Shortcuts: New/Edit View screen (View Editor tab)

Remember to also see section “10 Shortcuts: All workbench screens” on page 77.

When you first display the View Editor tab for a view, you must enable the grid of cells before you can start to work on this screen. Enable the grid as follows:

- EITHER **click in any cell** in the grid,
- OR **press Arrow down, Arrow left or Arrow right**.

Once the grid is enabled, you can work on cells in the grid.

The grey cells are non-editable.

The yellow cells are a sort key described on the Sort Key Properties screen. To work on these cells, arrow to the yellow cell and press Spacebar.

The green cells are described in the Column Source Properties screen. To work on these cells, arrow to the green cell and press Spacebar.

The **white** cells are always in one of two modes:

- EITHER in **Display mode** - the cell value is read only,
- OR in **Edit mode** - the cell value can be changed.

To **start Edit mode** in a white cell, do one of the following:

- EITHER **left click** on the cell,

- OR press **Tab** enough times to reach the cell,
- OR **arrow** to the cell and press **Spacebar**.

To **end Edit mode** and return to Display mode in a white cell, do one of the following:

- EITHER press **Enter** to accept all changes,
- OR press **Tab** to exit the cell and also accept all changes,
- OR press **Escape** to cancel all changes made to the cell.

The table of shortcuts for this screen is below:

Shortcut	Notes
Alt + Left arrow	Move column left.
Alt + Right arrow	Move column right.
Arrow down	The behavior of Arrow down is as follows: • For a cell in Display mode, Arrow down jumps to the next cell below. This happens even if the next cell is grey, yellow, green or white. In the lowest cell in the column, Arrow down has no effect. • For a cell with a list of values in Edit mode, Arrow down **highlights the next lower value**. If the lowest value in the list is highlighted, then Arrow down has no effect. • For a cell of any other type in Edit mode, Arrow down has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Arrow left	The behavior of Arrow left is as follows: • For a cell in Display mode, Arrow left jumps to the cell in the column immediately to the left. This happens even if the target cell is grey, yellow, green or white. For a cell in Column 1, Arrow left has no effect. • For a cell with a list of values in Edit mode, Arrow left **highlights the next higher value**. If the highest value in the list is highlighted, then Arrow left has no effect. • For a cell of any other type in Edit mode, Arrow left has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Arrow right	The behavior of Arrow right is as follows: • For a cell in Display mode, Arrow right jumps to the cell in the column immediately to the right. This happens even if the target cell is grey, yellow, green or white. For a cell in the rightmost column, Arrow right has no effect. • For a cell with a list of values in Edit mode, Arrow right **highlights the next lower value**. If the lowest value in the list is highlighted, then Arrow right has no effect. • For a cell of any other type in Edit mode, Arrow right has no effect. For a discussion of Display mode and Edit mode, see the text above this table.

Shortcut	Notes
Arrow up	The behavior of Arrow up is as follows: • For a cell in Display mode, Arrow up jumps to the next cell above. This happens even if the target cell is grey, yellow, green or white. If the cell above has "Column 1" or a similar title, then Arrow up has no effect. • For a cell with a list of values in Edit mode, Arrow up **highlights the next higher value**. If the highest value in the list is highlighted, then Arrow up has no effect. • For a cell of any other type in Edit mode, Arrow up has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Ctrl + C	**Copy the highlighted column.** Highlighting just one cell in a column is enough to identify the column for this copy.
Ctrl + K	**Make sort key** or **Make non sort key**. Highlighting just one cell in a column is enough to identify the column for this action. Will make the highlighted column part of the sort key, or remove that column from the sort key.
Ctrl + V	**Paste a column left** of the highlighted column. Highlighting just one cell in a column is enough to identify the column for this action. You must have copied a column first (using Ctrl-C).
Ctrl + Shift + V	**Paste a column right** of the highlighted column. Highlighting just one cell in a column is enough to identify the column for this action. You must have copied a column first (using Ctrl-C).
Delete	If a **grey cell** is highlighted then delete the **entire column**. If any other cell is highlighted then delete the **contents of that cell**.
End	Go to the cell to the right as far as possible in this grid.
Enter	The behavior of Enter is as follows: • For a cell in Display mode, Enter has no effect. • For a cell in Edit mode, Enter **accepts the current value in that cell** and places that cell in **Display** mode. For a discussion of Display mode and Edit mode, see the text above this table.
Escape	For a white cell in Display mode, Escape has no effect. For a white cell in Edit mode, Escape **cancels all changes** made to that cell and places that cell in **Display** mode. For a discussion of Display mode and Edit mode, see the text above this table.
F5	**Activate / Deactivate** the view. If the view heading has **[Inactive]** this attempts to activate the view. If the view heading has **[Active]** this makes the view inactive.
F9	**Show Grid / Properties.** This switches between the two large tabs for a view: the "View Editor" tab and the "View Properties" tab. The "View Editor" tab contains the view columns and can be called the "grid".

Shortcut	Notes
Home	Go to the cell to the left as far as possible in this grid.
Insert	Insert a new column to the left of the currently selected column. Highlighting just one cell in a column is enough to identify the column for this action.
Page-down	Go to the bottom cell in this column.
Page-up	Go to the top cell in this column.
Shift + Tab	Jumps in the reverse direction given for "Tab" lower in this table.
Spacebar	For a white cell in Display mode, Spacebar places the cell in **Edit** mode. For a white cell in Edit mode, the behaviour of Spacebar is as follows: • In a text field, Spacebar results in a **space character ( )**. • In a checkbox field, Spacebar **toggles between a tick and no tick**. • In other fields such as numeric fields or a list of values, Spacebar has no effect. For a discussion of Display mode and Edit mode, see the text above this table.
Tab	Once the grid is enabled, the behavior of the Tab key is as follows: • In a cell in Edit mode, the Tab key **accepts the current value of that cell, places that cell in Display mode and jumps to the next editable cell downwards in that column**. If there are no more editable cells in that column the Tab Key jumps to the first editable cell in the next column to the right. If there are no more columns then the cursor does not change position. • In a cell in Display mode or in a grey (non-editable) cell, the Tab key **jumps to the next editable cell downwards in that column**. If there are no more editable cells in that column the Tab Key jumps to the first editable cell in the next column to the right. If there are no more columns then the cursor does not change position. For a discussion of enabling the grid, Display mode and Edit mode, see the text above this table.

32 Shortcuts: New/Edit View screen (View Properties tab)

Remember to also see section “10 Shortcuts: All workbench screens” on page 77.

The "**View Properties**" tab has sub-tabs:
- **General sub-tab**
- **Extract Phase sub-tab**
- **Format Phase sub-tab**
- **Header/ Footer sub-tab**

The shortcuts in this section apply to all sub-tabs of the View Properties tab.

Shortcut	Notes
Ctrl + C	**Copy the highlighted text.** This prepares for a paste (see the next shortcut below).

Shortcut	Notes
Ctrl + V	**Paste text left** of the cursor position. You must have copied text first (using Ctrl-C).
F5	**Activate / Deactivate** the view. If the view heading has **[Inactive]** this attempts to activate the view. If the view heading has **[Active]** this makes the view inactive.
F9	**Show Grid / Properties.** This switches between the two large tabs for a view: the "View Editor" tab and the "View Properties" tab. The "View Editor" tab contains the view columns and can be called the "grid".

80 Shortcuts: Logic Text screens

Remember to also see section “10 Shortcuts: All workbench screens” on page 77.

This applies to screens such as:
- Create New Extract Record Filter
- Create New Extract Column Assignment
- Create New Format-Phase Column Calculation
- Create New Format-Phase Record Filter
- Edit Extract Record Filter
- Edit Extract Column Assignment
- Edit Format-Phase Column Calculation
- Edit Format-Phase Record Filter

Shortcut	Notes
Ctrl + A	**Select all logic text.** This highlights all the logic text.
Ctrl + Shift + A	**Deselect all logic text.** No logic text is highlighted.
Ctrl + C	**Copy the selected logic text.** This copies any currently highlighted logic text, in preparation for a paste (see Ctrl + V below).
Ctrl + V	**Paste the copied logic text**. Overwrites any currently highlighted logic text, or pastes to the current cursor location. You must have copied some logic text first (using Ctrl+C).
Ctrl + Y	**Retype** the last character deleted by Ctrl-Z. Can be used for up to 25 characters.
Ctrl + Z	**Delete the last character typed.** Can be used for up to 25 characters.
F7	**Check Logic Text.** The same action as clicking the icon  .

90 Shortcuts: Edit User screen

Remember to also see section “10 Shortcuts: All workbench screens” on page 77.

Shortcut	Notes
Alt+F6	**Refresh defaults.** Restores the defaults that apply to a new user and removes any configured defaults. The same action as clicking the icon .

Where is the WE log file?

See topic "**Changing Log Path**" to display the current path to the log file. To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

For more on WE log files, see topic "**WE log file overview**". To find that topic in a PDF, see chapter "**Cross reference of topics and PDF files**".

Chapter 3. Cross reference of topics and PDF files

How to download a PDF

Go to SAFR Information Center, select **About this Information Center** and select **PDF**. Follow the instructions on that page.

Alphabetical list of topics

Note the following:

- "**InfoCtr4150**" means the PDF called "**SAFR Information Center 4.15.00**" which contains all help topics.
- "**Top 3**" means the PDF called "**Top 3 - Admin Guide, General Users Guide and Overviews**".

Find the required topic in the first column below. The columns to the right show the PDFs that contain that topic.

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Add View Source screen help	Screens			InfoCtr4150
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