MSC Software Documentation

Introduction

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Shared Logic

Welcome

The Shared Applications for Metal Service Centers software features a number of advanced features that provide reliable and easy to use methods of managing the information on which your business depends. To assist users in learning how to operate this application, it has been designed for consistency between all the modules that comprise the software package. Consequently, the commands that work in one module will perform the same functions within any other module. Therefore, this introductory section is provided to assist users in learning the key components of the software. This knowledge can then be applied to any section of the software that the user might use.

Initially, this chapter will introduce how users access the system. After this, each of the main software elements will be introduced. General information about each type of component is then described in order to familiarize the user with how these controls operate. This section will then conclude with an overview of each module and a summary of the help information that is included with the application.

Accessing the Software

Access to the software is provided by the User Access Security window, which is displayed as soon as the client portion of the application is launched. To access the software, the user must provide valid identification about themselves and the information that they would like to use. For flexibility and data security purposes, the software allows businesses to separate data among companies and divisions. Consequently, users must identify which set of data that he or she wants to works with during the login process.

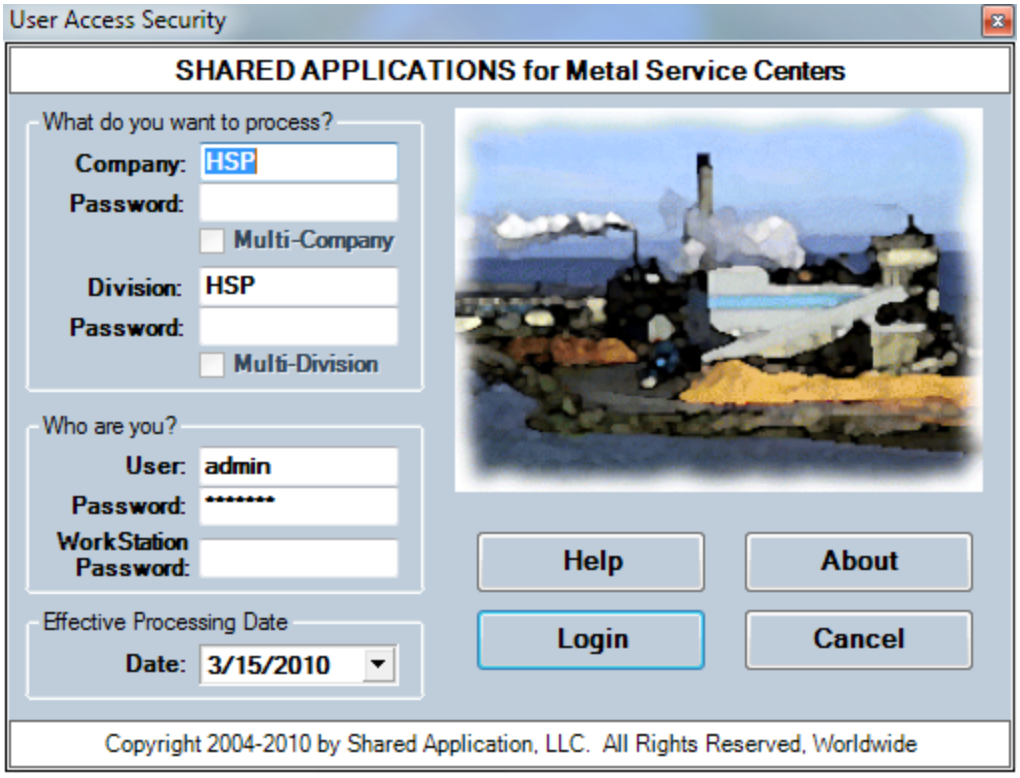


Figure 1: The User Access Security window.

This identification is done through the use of codes, which are unique IDs for almost everything stored within the software. Each company, division and user is assigned a code (as will be described in later sections of this documentation.) Items such as purchase orders, invoices, accounts, etc are also assigned codes. To access a particular company or division, simply enter its code in the appropriate field on the User Access Security window. For example, in Figure 1 the company code “HSP” is entered into the Company field.

It should be noted that company and division passwords may or may not be required depending on the company/division that the user is attempting to access; one company or division may require a password, whereas another may not. For security purposes, no indication is given if a company or division password is required. Be sure to enter passwords exactly as they have been given to you. Also, all passwords are case sensitive – each uppercase or lowercase letter must be entered in the

appropriate case to be recognized. (Codes, on the other hand, are not case sensitive and can be typed in any combination of the two cases.)

Once the user has identified the company/division that he or she wants to access, the user must then enter his or her personal code and password. User codes are entered within the User field, while user passwords are then entered into Password field immediately beneath the User field. All users are required to have passwords and these are masked as they are typed to prevent them from being seen by others.

Optionally, the user might also have to enter the password for the computer that the user is currently using. This password, if required, must be entered into the Workstation Password field. Workstation passwords may only be required for certain computers and will most likely change from one machine to the next. Once all of the required information has been entered, the user then presses the Login button to access the MSC software.

If incorrect login information has been used, a warning message will appear and the user will not be permitted to access the system until all required identification has been provided. As a security measure, the application will exit if the user attempts to access the system three times with incorrect information. Since codes and passwords are given to users by administrators of the software, a user having difficulties logging in should contact the administrator who provided the codes and passwords that are being used to verify their spelling and the case of each letter.

Before accessing the system, the user can also set the default date that will be used by the software during the data entry process. While audit information is always based on the current date, most date values initiated on the user's machine will default to the date selected in the Effective Processing Date field. For example, any reports generated by the user will be based on the processing date. This date may also be changed after the user logs in using the Main Menu.

The next section will describe each component on the User Access Security window and how each is used. Electronic documentation about this window can be accessed using its Help button.

Components

Company **[Required Field]** – identifies which company's data that the user will work with. The user must enter a valid company code, which may or may not be similar to the company's actual name.

Password **[Possibly Required]** – a password might be required for a company. Therefore, do not be alarmed if you must enter a password for one company code and not another. For security reasons, no distinction is made between companies that require a password and those that do not. All passwords are case-sensitive and are in a strong format which prevents them from being easily guessed.

Multi-Company – if checked, the reporting tool will be started in multi-company mode. Do not check this box if you wish to work with data belonging to a single company only. The reader should note that not all users will have access to this functionality.

Division **[Required Field]** – identifies the division within the specified company whose data will be accessed by the user. A valid division code, which may or may not resemble a division's actual name,

must be entered here.

Password **[Possibly Required]** – a password may or may not be required for a division. Therefore, do not be alarmed if you must enter a password for one division code and not another. For security reasons, no distinction is made between divisions that require a password and those that do not. All passwords are case-sensitive and are in a strong format which prevents them from being easily guessed.

Multi-Division – when checked, the reporting tool will be started in multi-division mode. Do not check this box if you wish to work with data belonging to a specific division. Note: Not all users will have access to this feature.

User **[Required Field]** – identifies the user who is attempting to access the system. A valid user code must be entered into this field before the user can access the software. These codes are provided to users by administrators and may or may not be a derivative of the user's name.

Password **[Required Field]** – user passwords are required. These passwords are case sensitive and in a strong format which prevents them from being easily guessed.

Workstation Password **[Possibly Required]** – each computer that accesses the MSC server may or may not be assigned a password. Typically, these passwords are specific to each machine and are required if a password has been assigned to the computer. For security reasons, no distinction is made as to whether a workstation password is required or not.

Effective Processing Date – sets the date that most dates used by the software will default to during the current session. This date can be changed after the user has logged in and most dates can be changed individually by the user. Audit and security information is not affected by this setting.

Help – provides access to the online help system and electronic documentation which can assist the user in using the User Access Security window.

About – displays information about the version of the software that is being used as well as copyright and contact information.

Login – after all required identifying information has been entered, this button submits the information for verification. If it is accepted, the user will be granted access to the software and the Main Menu will then be displayed. However, if any of the provided information is incorrect, the login will fail. After three failed attempts, the software will exit and must be restarted.

Cancel – exits the User Access Security window without attempting to access the software. The user will have to restart the application before he or she can attempt to login again.

Helpful Hints

If you have been authorized to access more than a single company and/or division, you can log into different entities at the same time without using the reporting tool. However, to do so, you will need to start a new instance of the client software for every company/division combination that you wish to

access. For example, if a user is a member of two divisions, he or she could run two copies of the MSC software on his or her computer at the same time, provided that the computer has sufficient memory to do so. The user would then login to a different division on each of the two copies.

Alternatively, users can choose to work with a single company and/or division at one time. When the user wants to access the information in another division, he or she would use the Change Login item in the File menu of the Main Menu to switch entities without having to exit and then restart the client application. The Change Login item is discussed more thoroughly in the Main Menu section of this chapter.

> ***Note:*** *All workstations must be pre-registered in the software before they can be used by authorized users to access the software. Contact an administrator if you can use one workstation, but not another to access the software.*

Window Basics

As stated earlier in this chapter, the MSC software has been designed to provide a consistent and user-friendly environment that delivers to users the information that they need to fulfill their duties. As such, the structure of the application is consistent from the first module to the last. Once a user learns how one program unit behaves, he or she can readily understand how to use any other unit within the software. This section is meant to assist users by providing an overview of the general format used by the application's windows and how they are used in general terms. Of course, specific details about each program unit can be found in the chapter that describes the unit and the rest of its module.

Just as the Main Menu provides access to commands that affect the entire application, the menu bar at the top of each window contains commands that affect the information displayed within that particular window. Often these commands can also be performed by buttons or other controls located elsewhere on the form. However, this duplicity allows the user to work with the application via the method most comfortable to them. Similarly, the help content accessed via the window's menu is initially focused on information pertaining to the window that called it while the Help item in the Main Menu initially displays help about the application in general. Regardless of how the help system is accessed, the user can access information about any other topic contained in the system. Each item found in this menu will be listed and explained later in this section.

Below a window's menu are the components that display and edit the information related to the program unit. While the functions of each component are described in the next section of this chapter, it is important to note that most of the software's windows employ header-detail relationships. This means that a user must select the record (invoice, vendor account, purchase order, etc) that he or she wishes to work with before any details will be displayed or their related controls can be used. To prompt the user to make this selection, most components on a window will be disabled (shaded in grey) until the selection has been made. Afterwards, the data that corresponds to the selected record is displayed and the components are enabled.

Users will also notice some fields and grid columns that are shaded with a colored background. These represent data that must be entered before the record can be saved. Along with this visual indicator, required fields are also the only components that are included in the tab order, which allows users to use the Tab key on the keyboard to move to only the fields in which information must be entered. If an incorrect value has been entered into a field, a warning will appear and the record will not be saved until the value is corrected.

Along the bottom of each window is a status bar that contains buttons that perform specific actions and message areas that alert the user to specific conditions or events. For example, the phrase "Edit Mode" is displayed in the lower right corner of data entry windows to remind the user to save the information that he or she has entered before moving on to another task. More specific messages are also displayed in the center of the status bar as needed. Information about specific messages can be found in the software's online help and in subsequent chapters of this manual.

Main Menu

The Main Menu runs along the top of the screen when the MSC application is active and cannot be closed without exiting the software. This menu provides access to a number of features as well as the software's online help system and electronic documentation. Users can also use this menu's integrated drop-down displays to view troubleshooting information and to change the Effective Processing Date, which sets the default date used by the software.

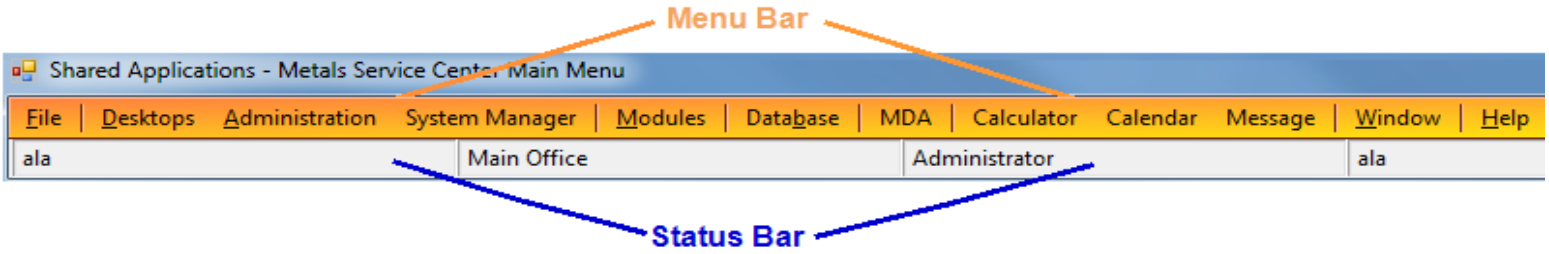


Figure 2: The Main Menu with its items and the Status Bar highlighted.

This section of the manual discusses each item in the menu and the drop down displays accessible by clicking on the items in the status bar along the bottom of the menu. These topics are introduced in the order in which they appear, from top to bottom and left to right.

File

The File menu provides access to commands that influence the user's interaction with the application as whole. Some of these options may be accessible from other areas in the Main Menu while others can only be accessed from within this menu. Each of these commands is described below:

Change Login – closes all open program units and displays the User Access Security to allow the user to log into another company and/or division. The user must be given security clearance to the entity – even if the appropriate codes are known – before he or she will be permitted to access the data. Please note that pressing the Cancel button on the User Access Security window will cause the software to exit instead of restoring the previous session.

Change Processing Date – allows the user to set the default date that the software will use during data entry. The processing date selected here will only be used as the default during this session. Nearly all date editors that default to this date can be changed on a per instance basis and the processing date itself can be changed at anytime using either this item or the corresponding status bar drop-down. Any changes made here will not influence the audit and security information that is recorded automatically by the software.

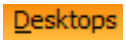
Change User Password – this item may or may not be enabled on your copy of the MSC

software. If this item is accessible, it can be used to modify your login password. Any password created here must contain at least one uppercase character and one punctuation character. Remember that all passwords used in this application are case sensitive. For security reasons, you must verify your current password before entering the new password twice.

Printer Setup – assists the user in configuring the default printer settings that will be used when reports and other printed materials are printed the application. These settings may be overridden each time data is printed. Only the printers accessible to the computer that the user is operating will be listed in this configuration window.

Exit – closes the MSC application. As the individual windows are closed, you will be prompted to save any uncommitted changes.

Desktops



The Desktops menu provides the ability to load, manage and save desktop layouts – collections of program units that are opened together. For example, a user may choose to save a layout consisting of their most frequently used program units.This desktop can then be use to quickly open the units each time the user logs into the software. There are two types of desktop layouts – division and user. Division Desktops are created by administrators for the use of all users within a division. On the other hand,User Desktops are saved by individual users for their personal use. When necessary, users can remove any user layouts that are no longer needed from this menu. However, only administrators can remove Division Desktops.

At the bottom of this menu are several options that define the behavior of the software in terms of how and when programs are displayed. For instance, the software can be set to record each window that was open when the user last logged out. These same windows will then be displayed the next time the user accesses the software. Each item in this menu is more fully described below:

Load Division Desktops – displays a list of all Division Desktops saved for the division that the user is currently logged into. To load a desktop, simply left click on its name. Please note that this option will be disabled if there are no desktops saved for the current division.

Manage Division Desktops – users with sufficient security access can save or delete Division Desktops using the popup window that appears when this item is clicked. To create a new desktop consisting of all program units that are currently open, enter a descriptive name into the appropriate field and then press the Save button. Since division desktops are available to all users who log into the respective division, any layouts created for personal use should be saved as a User Desktop instead. To remove a division desktop, which will affect all users of the division currently logged in, select the division and then press the Delete button. As previously noted only administrators can create and remove division desktops.

Load User Desktops – lists all of the desktops that the user has saved. These desktops are

saved with the user's settings and not on their workstation. Consequently, a user can use a desktop on one workstation that was created on another. To load a User Desktop, left click on the desired division name.

Manage User Desktops – allows the User Desktops to save new desktops or delete those that are no longer needed. To create a new desktop consisting of all program units that are currently open, enter a descriptive name into the appropriate field and then press the Save button. Conversely, to remove a desktop, select its name from the list and press the Delete button.

Reset Forms on Login – if checked, any windows that were open when the user last logged out will be restarted the next time that the user logs in, regardless of the workstation being used. Depending on whether the Save Form Positions on Logout option is selected, each window will appear in either its previous or default location.

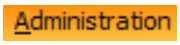
Auto Size Form on Load – if checked, this feature resizes the window to fit in proportion to the user's monitor settings.

Allow Form Resize – if checked, this feature allows the forms to be resized to the full length and width of the screen, using the square maximize button in the top right corner of each window.

Save Form Positions on Logout – when checked, the exact position of each open window will be saved when the user logs out. If the Restart Forms on Login feature is selected, each window will appear in its previous location. Otherwise, program units will be displayed in their last position when they are started by the user.

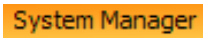
Reset Form Positions – pressing this item will restore each open window to its default location, which is immediately right of the top of the Modules Menu. If more than one window is open, the windows will cascade to allow the user to see each window's title.

Administration



The Administration menu allows administrators to access the program units that are used to configure the software, manage users and workstations and to perform other maintenance tasks. This menu item will be disabled for non-administrative users. Since most users will not have the access levels needed to work with this module, detailed information about the program units within it is reserved for the Administration chapter of this manual.

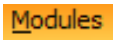
System Manager



Codes defined using the System Manager module are used throughout the software for a variety of purposes. For example, Currency codes are used to define the currencies that are used in the

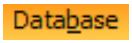
accounting modules. Other System Manager codes are used to categorize accounts, define fiscal years and create payment terms. Access to this module may be limited to certain users depending on how the software has been configured. Detailed information about this menu is reserved for the System Manager chapter of this manual.

Modules



Pressing this button causes the Modules Menu to appear along the left border of the screen. If the Modules Menu is displayed, the Modules button will have no effect. To have the Modules Menu appear when you first log in, make sure the Reset Forms on Login setting is checked within the Desktops menu and leave the Modules Menu open every time you log off. For more information about this menu, consult the Modules Menu of this chapter.

Database

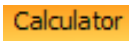


Authorized users can access the various maintenance programs that are used tomaintain the data stored by the software by using this menu item. If a user does not have access to these programs, this menu item is disabled. chapter of this documentation.

Metal Data Analysis (MDA)

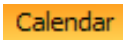
Pressing this button causes the Metal Data Analysis window to appear on the screen. This module allows the user to view specific reports based on the listed criteria. Please view the chapter on Metal Data Analysis for more information regarding this report program.

Calculator



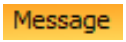
When pressed, this menu item opens a multi-function calculator which can be used to perform basic calculations. This calculator can be saved as part of a desktop to make it readily available to users who frequently use it.

Calendar



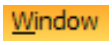
For the user's convenience, a calendar is displayed when this menu item is clicked. Although each date field (see the next section for details) incorporates a built-in calendar, the calendar accessible from this item can be used as a general reference. The month and year can be changed by using the appropriate directional arrows next to the corresponding period of time.

Message



The Message menu item allows users to access the software's built-in messaging system. Using this system, users can communicate to each other across the network while taking advantage of advanced features such as message prioritization. For complete help on using the messaging system, please refer to your administrator.

Window



This menu item contains commands useful for manipulating the MSC software's open windows. For example, a user can select an open window from the list at the bottom of this menu to bring that window to the front of all others.

Help

Access to the software's online help system and electronic documentation is provided via this menu item. To assist users in finding the help information that they need quickly and easily, the help content is organized in a multi-tiered approach. Help accessed from the Main Menu will begin with application wide content whereas accessing the online help from within a program unit's window will display help content specific to that unit. Users can also display help information about a specific component by focusing on the desired component (by single clicking on it so that it is outlined) and then pressing the F1 button on the keyboard.

In addition to providing access to application-wide help information, the help menu also provides links to important troubleshooting information which may be needed during support calls. Each of the items listed in this menu are described below:

Contents – displays the online help system's table of contents. Users can quickly access information about specific program units or features using this table, the index or the integrated search capabilities.

User Information – when clicked, this item displays read-only information about the user's account. Users can also access this information by clicking on the User Name field on the status bar that runs along the bottom of the Main Menu (see the next topic in this section for details.)

Station Information – provides read-only information about the workstation that is being used to access the software. Users can also access this information by clicking on the Station Name field on the status bar that runs along the bottom of the Main Menu.

Company Information – displays read-only information about the company that the user is

currently logged into. Users can also access this information by clicking on the Company Name field on the status bar that runs along the bottom of the Main Menu.

Division Information – when clicked, this item lists read-only information about the division that the user is currently logged into. Users can also access this information by clicking on the Division Name field on the status bar that runs along the bottom of the Main Menu.

About – displays a popup window which contains information about the version of the MSC software that is being used.

Main Menu Status Bar

Positioned along the bottom of the Main Menu is the status bar, which is divided into six sections. Each section displays information about the user, the workstation being used and the company and division which the user is logged into. Left clicking on any item in the Status Bar will display additional information about the displayed value. For example, clicking on the user's name provides more information about the user. Typically, this information is most useful to administrators and other support personnel during troubleshooting. One exception, however, is that the Effective Processing Date can be changed by clicking on the corresponding date within the Status Bar.

Figure 3: Each item in the status is described below, in the order in which they appear from left to right.

Company Name – identifies the company that the user is logged into. Left clicking on this item will display additional information about the company, including its address, database record number and the contact responsible for it. Please note that this information is also available by clicking on the Company Information item within the Help menu.

Division Name – displays the name of the division that the user is logged into. Information about it and its primary contact can be displayed by left clicking on this area. This information is also available by clicking on the Division Information item within the Help menu.

User Name – provides the name of the user who is currently using this copy of the client software. Left clicking on this item displays more information about the user, including his or hers email address and access levels. This information can also be displayed by using the User Information item in the Help menu.

Station Name – identifies the workstation that this copy of the client software is running on. Clicking on this name will display the station's access level and its database record number.

Effective Processing Date – this is the date that most date editors within the software will default to during this specific session. However, this date does not affect the audit information that is automatically maintained by the software. This date can be changed at any time by left clicking on this item or the Change Processing Dateitem within the File menu. To set the processing date during login, use the Effective Processing Date field in the lower left corner of the User Access Security window.

Messages – the last field provides information regarding the number of messages that have been sent to the specified user.

Window Menus

Along the top of most windows in the MSC application, is a menu bar that provides access to commands related to the information displayed within a particular window. Some of these commands can be performed by using the controls located on other parts of the window while other commands can only be accessed via this menu. Although every potential menu item is described below, please note that some window menus may not contain every item. For example, windows that are used to generate reports typically do not have an Audit Trail item in their menu because such an item is inappropriate in that use.

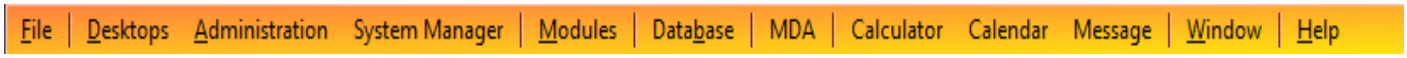


Figure 4: An example of the windows menu.

File – the commands contained within this menu are used to create new records (vendor or customer accounts, invoices, purchase orders, etc) or to save any modifications made to the record being modified. The contents of the File submenu will change depending on the program unit that is being used.

Edit – contains commands that affect existing information. In addition to the standard text manipulation commands of Cut, Copy and Paste, this submenu may also contain commands that can modify the currently selected record. For example, many program units may have an Edit Code item within the Edit menu which allows the user to change the record's unique identifier. As with the File menu, the content of this menu also varies from one program unit to another.

Reports – many program units within the MSC software allow the user to print or display information in one or more report formats. Users can select the content that will appear in the report using the Selection Criteria and how that content will be sorted and organized using the Report Options. Users also have the ability to save their custom report criteria for future use. Also, please note that the information accessible via a program unit that does not have a Reports menu item is often included in a report printed using another unit; these instances will be noted in the documentation that corresponds with each appropriate program.

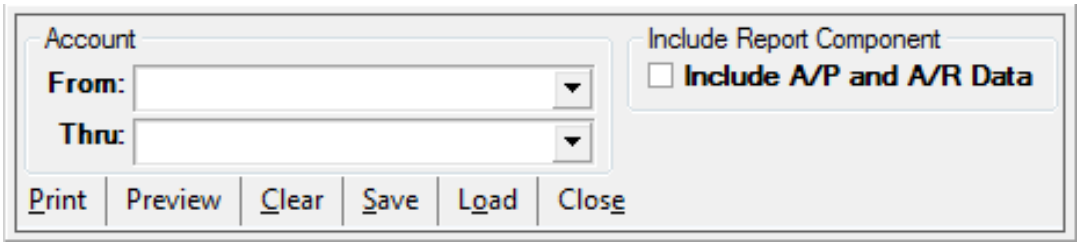


Figure 5: An example of a Reports Criteria popup window.

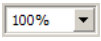
When the Reports menu item is pressed, a popup window similar to that shown above will be displayed to assist the user in defining the report's content and structure. The controls used to select which information is included are always displayed on the left side of this window; typically, the labels

for these controls begin with the words From, Thru, Include, and List. From controls specify the first object (account, invoice, transaction, etc) that will be included in the report. In contrast, the Thru controls set the last object to be included. Leaving a From or Thru field blank will cause the respective first or last entry on the selection list to be included. Include criteria, on the other hand, focuses the report on the information that meet the specified value. Using Figure 5 as an example, if a posting frequency is selected from the Include Frequency to Post drop-down list, only those standard journal entries that are of the selected posting frequency will appear in the report. Although an example is not shown above, some reports also feature List criteria, which allow users to enter a comma separated list of items that are to be included in the report.

Additionally, some reports also allow the user to define how the content will be organized in the report and if additional information should be included. The controls that modify these settings are placed on the right side of report popup windows. While specific information about each program unit's reporting tools are included in the unit's documentation both later in this manual and in the software's online help system, the remainder of this subtopic will discuss the features common to all reports.

Print – creates a report based on the criteria and options selected in the reports popup window and sends it to a printer specified by the user. Before the report is printed, the Printer Preferences page will be displayed to allow the user to select an appropriate printer and define its settings. Since the MSC software uses the Windows printing system, users familiar with printing documents from other Windows applications will already know how to change these settings. For those users who are new to printing documents in Windows, it is suggested that you read the appropriate documentation included within the Windows™ online help system.

Preview – creates a report based on the selected criteria and displays it in a new window. Users can use this feature to review the report before printing it. Also, users can customize the appearance of the report using the tools built in to the Preview window; these tools are described in the following table.

Menu Command	Toolbar	Description
Search		allows the user to search for specific words or phrases. This feature is able to locate whole and partial words, match cases and to search in either direction.
Open		allows the user to open a previously saved document.
Save		this button allows the user to save the document to their computer for later reference.
Print		pressing this button will display the Printer Preferences window before sending the previewed report to the selected printer. This button is equivalent to using the Print button on the Reports popup window. Unlike the Direct Print button, this feature should be used when the user wants to select the printer that will be used and/or configure the printer's settings.
Print Direct		this button is used to bypass the Print Preferences window and to print the document using the default printer and settings.
Page Setup		specifies the size and orientation of the paper that the report will be printed on.
Hand		when less than an entire page is displayed in the window, the Hand tool allows the user to pan the image. For example, if a page has been magnified using the Zoom In function, this tool can be used to view other sections of the page without adjusting the level of magnification or using the scroll bars.
Magnifier		if the user has increased or decreased the magnification level, this button can be used to restore the image to the selected Zoom Level – which defaults to 100%.
Zoom In		increases the magnification level that the report is displayed in. It may be quicker to use the Zoom Level feature instead of this buttonto quickly make large adjustments in the magnification level.
Zoom Out		decreases the magnification level. To make large adjustments in the magnification level quickly, consider using the ZoomLevel list instead.
Zoom Level		provides quick access to the available magnification levels.
Page Navigation		these buttons are used to navigate across the report's pages. The outer buttons are used to move to the first or last page in a document while the inner buttons move to the previous or next page.
Multiple Pages		use this tool to display more than one page on the screen at one time. To select the number of pages thatwill appear, highlight the appropriate number of page icons by moving the mouse cursor to the last page to be displayed. Pages are selected from left to right, top to bottom. For example, to display four pages in a 2 X 2 grid, select the left two pages on the top row and the two pages below them. To expand the number of pages that are displayed in the drop-down form, move the cursor past the right or bottom edge.

Menu Command	Toolbar	Description
Background Color		to print the document using a colored background, select the desired color here. This feature may be helpful in distinguishing versions of the same report or to alert the reader to an important page or document.
Watermark		Use this feature to apply text or an image the background to one or more pages of the previewed report. For example, the phrase "For Internal Use Only" may be applied to each page of a sensitive document. Using the window that appears, users are able to adjust the font of any textual watermark and how the watermark is positioned on the page.
Export		along with printing the report, the user can save the previewed report as one of many different file types. To export the document, click the arrow to the right of the icon shown above and select the desired file type. A Save File dialog box will then appear to assist the user in selecting in which folder the file will be saved to. Each supported file format is listed and briefly described below: *PDF*– creates a file that is usually read-only and can only be viewed with special software, usually provided by Adobe. *HTML* – saves the report as a web page that can be viewed with most web browsers. *Text* – exports the previewed report as a standard ASCII text document that can be viewed on nearly any computer without additional software. While these files can be edited, they lose most of their formatting, such as background colors and watermarks. *CSV* – creates a comma separated value file based on the report. These files can typically be opened by Microsoft Excel, Access and some other applications. *MHT* – saves the report in the multipurpose internet email extensions HyperText Markup Language (MHTML) format. This format is typically used to display the file as part of an e-mail message, although other applications may be able to view it. *Excel* – saves the report in XLS format which can be read by Microsoft Excel™ and some other spreadsheet applications. *Rich Text* – this is a word processing format that is compatible with a large number of text editors and word processors, including Microsoft Word. Unlike ASCII text files, this format preserves special formatting. *Graphic Document* – saves the report in one of several image file formats that can be opened by a number of applications and web browsers. However, these often have large file sizes.

Menu Command	Toolbar	Description
Email		use this feature to email the previewed report as an attachment to a new email message. This file can be created in any of the export formats listed above. To select the appropriate file format, click on the downward pointing arrow to the right of the Email icon. Before the new mail message is created, the software will ask for the location that the attachment file will be saved to. Please note that you must have a MAPI compatible email client installed for this to work correctly.
Close		exits the Preview window.

Clear – this button resets the report criteria to the default values.

Save – preserves the currently defined report criteria for future use. After this button has been pressed, the user will be prompted to enter a descriptive name for their custom report layout. Saved layouts are then restored using the Load button.

Load – restores previously saved report criteria.

Close – exits the Reports popup window.

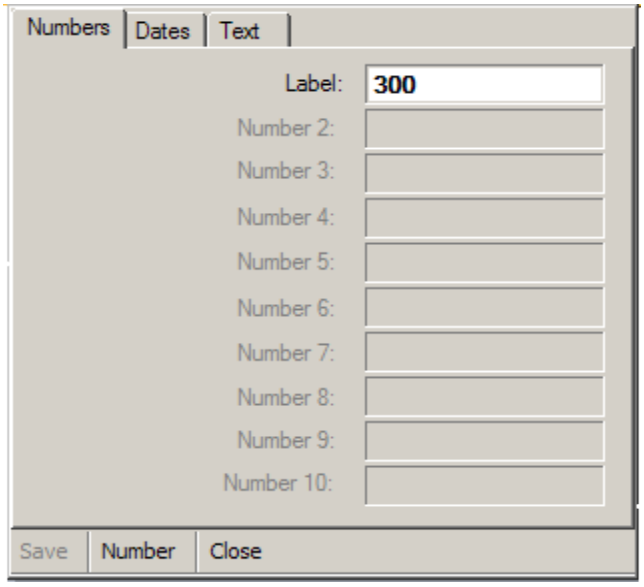


Figure 6: The User Defined Fields popup form.

User Fields – this menu item will only be enabled if an administrator has defined one or more User Defined Fields for the type of record that you are using. These fields allow a business running the MSC software to expand the application's functionality by storing additional information about specific records. Each record can have up to thirty user defined fields – ten that store numeric values, ten that store date values and another ten that store text. Administrators define both the labels that are displayed to the left of each User Defined Field and the type of information that the field will store. Information is entered and viewed within the User Fields window just as it in any other application window. When information has been saved to a record's user defined fields, the "User Fields" message will appear in the window's status bar each time that the record is viewed. Ask your administrator for a list of the User Defined Fields that have been added to the record types that you will use.

Numbers – contains user defined fields that only store numeric data, such as quantities or

amounts. As with the two other tabs on this display, administrators define the labels and the number of fields that are used. Any fields that have not been defined will be displayed in grey to indicate that they are disabled.

Dates – lists those user defined fields that contain only date values. Any fields that have not been defined will be displayed in grey to indicate that they are disabled.

Text – User Defined Fields that accept text values, such as names, descriptions and titles. Any fields that have not been defined by an administrator will be displayed in grey to indicate that they are disabled.

Save – records all values that have been entered into all User Defined Fields, regardless of whether they are on the tab that is currently being displayed or not. Consequently, all field values that have been changed will be saved with their new values, regardless of whether this is the intention or not. The only way to "undo" a change when the original value is no longer known is to use the Close button before the Save button is used.

Number – displays the database record number that the user defined fields are stored in. This number is important to support personnel and administrators and should be recorded if any problems occur.

Close – exits the User Defined Fields display window without saving any changes.

Memo – allows users to record detailed notes and explanations about the selected record. For example, a user entering a new sales order into the system may use a memo to record why a special discount was given. Once a memo has been saved for an item, users can append additional comments to the memo or create another memo for the item. Only administrators can remove saved memos.

As with User Defined Fields, this menu item will be enabled only for those program units that are configured to use it. In addition, this menu item only applies to data entry units – report programs, for example, do not contain the Memo item in their menus. Since administrators enable this functionality on a per unit basis, consult with your administrator if you believe that a program unit should have this feature enabled.

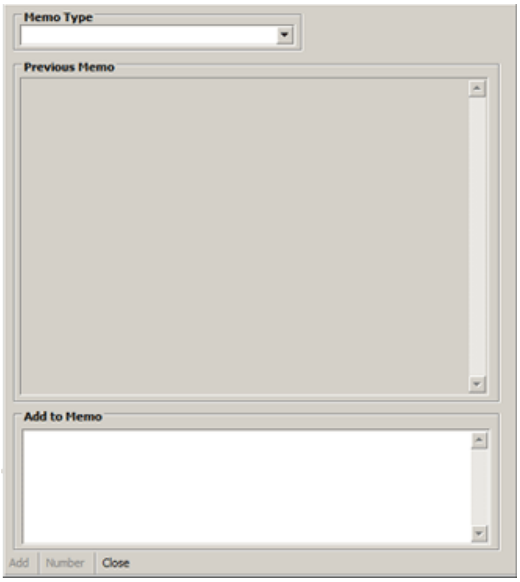


Figure 7: the Memo popup window.

To create a new memo, define a unique subject in the Memo Type field in the top left corner of the popup window. Next enter the appropriate memo text into the Add to Memo field. Once all of the desired text has been entered, press the Add button to save the new memo. As confirmation that the text has been saved, the memo text will be displayed in the read-only Previous Memo area instead of the editable area below. Please note that only Administrators can remove a saved memo and that any user with access to the program unit that the memo was saved with will be able to view the memo and its contents.

Adding text to an existing memo is also equally straightforward. Simply select the memo you wish to append in the Memo Type drop-down list. Review the existing text in the Previous Memo field and then enter the text that you wish to add in the Add to Memo area. When you are finished, press the Add button to commit your addition.

For troubleshooting purposes, the database record number assigned to the selected memo can be viewed by pressing the Number button.Users should note that memos are specific to the data record that was currently selected when the memo was created.

Audit Trail – all data entry program units incorporate the Audit Trail popup display which provides information about when the selected record was created and last modified. In addition to the date and time that the record was created and most recently modified, the user and the workstation that they were using are also listed. Please note that this information cannot be modified or deleted by anyone other than an administrator.In addition to the Created and Last Changed tabs, some Audit Trail displays also feature a Posted tab that records when the selected item has been recorded in the application's General Ledger. A description of each field on the popup window is provided below:

Created – lists audit information about the user who created the currently selected database record. As with all fields in this display, the dates and times recorded here are based on the server and not the Effective Processing Date set by the user who created the item.

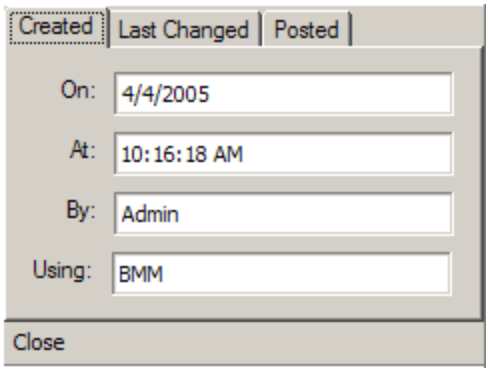


Figure 8: the Audit Trail popup window.

On – the date that the record was created.

At – the time at which the record was created.

By – the code of the user who initially saved the record.

Using – the code of the workstation that was used to create the selected record.

Last Changed – provides information about when the selected record was last modified

and by whom. As with all fields in this display, the dates and times recorded here are based on the server and not the Effective Processing Date of the workstation on which the user modified the item. Please note that when an item is created, the Created and the Last Changed tabs will both display the same information. For a complete listing of all the changes made to an item, use the Last Changed button in the program unit's menu (this is described in the next topic of this section).

On – the dateon which the record was most recently modified.

At – the timeat which the record was most recently modified.

By – the code of the user who most recently modified the selected record.

Using – the code of the workstation that was used to most recently modified the selected record.

Posted – this tab displays information about how and when an accounting transaction was recorded in the software's general ledger. As with all fields on this tab, the dates and times recorded here are based on the server and not the Effective Processing Date of the workstation that was used to post thetransaction. This tab will not appear for those items that are not posted to the general ledger.

On – the datethat the record was posted.

At – the timethat the record was posted.

By – the code of the user who posted the selected record.

Using – the code of the workstation that was used to post the selected record.

Last Changed Grid – lists all of the modifications that have been made to the selected record. Each row within this grid represents a change to a single value contained in the record. Therefore, a row is created in the grid for each change made to a record before it is saved. Each row in the Last Changed Grid displays information about the user who made the change, when the change was made, the original value that was changed and what change was made.

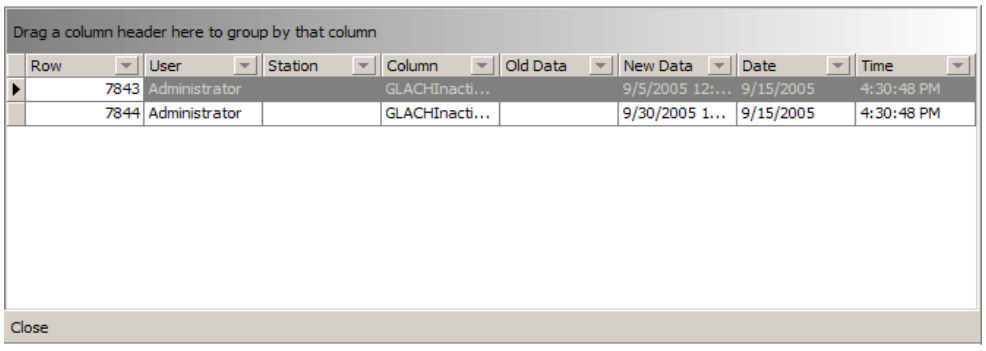


Figure 9: the Last Changed Grid popup window.

This grid can be filtered to display the changes that were made by a single user or on a specific date.

The rows in the grid may also be sorted by user, workstation, date or any other column.For instructions on how to filter and sort grids, please refer to the Grid topic of the next section of this chapter. Please note that unlike the Audit Trail Display feature, no entry is made to the Last Changed Grid when an item is first created. An explanation of each column that appears in the grid is included below.

Row – lists the number of the database record that was changed. In addition to assisting administrators during their maintenance tasks, these numbers can also be used during troubleshooting or to uniquely identify records.

User – identifies the user who modified the record.

Station – the code of the workstation that was used to modify the record.

Column – the column in the database record that stores the value that was changed.

Old Data – the value that was modified.

New Data – the value that replaced the old value.

Date – the date on which the modification was made.

Time – the timethat the modification was made.

Send Link – If messaging is enabled, the user is able to send a link of a file directly to another user.

Form Print – prints an image of the program window with the selected record's's values. When this button is pressed, the Printer Preferences window is displayed to allow the user to select which printer will be used and to configure its settings. While this feature can be used to print data entry errors or to print information about a single record, it is suggested that you use a program's reporting tool if information about multiple items is desired.

Help – provides access to the software's online help system and electronic documentation. Initially, the help content will be focused on the program unit that thehelp content was accessed from. However, the user can use the help system's integrated navigational tools to access information about other units, modules or the application in general. Please note that this behavior is similar to using the Main Menu'sHelp submenu except that the scope of the help content is different. When accessed from the Main Menu, the electronic documentation will be focused on the application as a whole instead. Explanations for each item in this menu are provided below:

Content – displays information about the program unit that was used to access the help system.

Search – provides access to the help system's integrated search tools.

Index – opens the electronic documentation's index.

About – displays information about the version of the MSC software that is being used.

… *Number* – for troubleshooting and reference purposes, the database number assigned to

the selected record can be displayed using this command. Note that the full name of this item will change based on the type of records being displayed. Also, some program units that display two or more records simultaneously will feature multiple … Number commands.

Modules Menu

Once a user has successfully logged into the software, the Main and Modules menus will be displayed to assist the user in accessing specific units of the software to perform common tasks. The Modules Menu displays a listing of all available modules and their program units in a convenient and easy to use structure. All program units contained in a module are nested beneath the name of the module. Only the modules which have been licensed to your business will appear in this menu; therefore, your menu may not appear identical to the one shown in the figure on the right. Also, the color scheme used to shade the menu is dependent on the colors chosen by the administrators of your MSC software.

Figure 10: The User Access Security window.

The Modules Menu can be displayed using the Modules item in the Main Menu. This window can be closed using the drop-down menu accessible by clicking the icon to the left of the window's title or by using the close button in the top right corner of the window. For legibility and usefulness, the Modules Menu cannot be resized.

To display the units contained within a module, simply left-click on the double downward arrow button to the right of the module name. Notice that the direction of the arrows reverses to indicate that the contents of the module is being displayed. To start a program unit, click on its title if the text is not shaded in grey. Module and unit titles that appear in grey indicate that the user does not have the security levels necessary to access them. If your duties require access to a unit or module that is currently disabled, contact your administrator.

For user convenience, links to the last ten program units that the user opened are stored in the Last Used group within this menu. To open this unit again, left-click on this link or start the unit from within the appropriate module grouping.

Users can add links to the program units that they use most often to the Favorites group. To add one of these links, right click on the title of the desired unit and then select Copy to Favorites. Links are added to the bottom of the Favorites group with the most recent entry as the last on the list. Any entry can be removed from the Favorites by right clicking on it and then selecting the Delete from Favorites item in the menu that appears. To remove every entry from the favorites, right click anywhere within the Modules Menu and then choose the Clear Favorites item.

Note: *Please note that removing and clearing entries cannot be undone; the user must manually add each entry back to the Favorites list to reverse the removal.*

The Modules Menu will only appear when the user first logs in if the Restart Forms on Login setting is enabled and the menu was open when the user last logged off. Please see the information about Desktop in the next section for an easy way of starting all frequently used programs when you log in.

Window Components

As previously stated, the MSC software features a number of specialized components which provide users the capabilities and flexibility they need to accomplish their goals using the information stored within the application. The purpose of this section is to introduce the reader to each of the various types of components and their behavior. How a component is used within a program unit is then described in the corresponding section of this manual and the help system's online documentation.

Status Bar

Every window in the MSC application features an integrated status bar along its bottom edge. Each status bar is divided into three areas, each of which assists the user in distinct ways. Starting at the left end of the status bar are any applicable task buttons which perform specific actions. These are followed by the User Message Area that provides the user with additional information. Lastly, the alerts inform the user if any special conditions are present. Each of these three areas is explained more fully below:

Figure 11: an example of a window's status bar with the three major areas identified.

Task Buttons – provide convenient access to common tasks that can be performed on the selected database record. For example, many program units feature an Edit Code button that allows the user to change the name and code which uniquely identify an record. To allow the user to use the application in the manner that he or she finds most comfortable, all of the tasks performed by these buttons can also be performed using the items in the program unit's menu.

Since each program unit works with information in a distinct way, explanations of the various buttons that may appear in this Status Bar area is beyond the scope of this section, this information is instead included in the documentation that relates to the program in question. Additionally, this information can found in the software's online help system and electronic documentation. Brief descriptions of each button can also be displayed by hovering the mouse cursor over the buttons while using the software.

User Message Area – this area is used to display warnings or special instructions to user or the data being edited and/or viewed. For example, most of the accounting related units display the name of the batch of transactions that is currently being worked with in this area. These messages are self-explanatory and vary between programs.

Alerts – the last area of the Status Bar informs the user if one of several predefined conditions exists. These alerts allow the user to perform additional actions depending on the presence or lack thereof a specific condition. Please note that not every program unit

will feature all three of these alerts. For example, the “User Fields” and “Memos” alerts will never be displayed in those units that do not have User Fields or Memos menu items or if these features have been disabled by an administrator. Each of the three alerts is described below:

Edit Mode – indicates that a value in the selected record has been changed. The user should save the item before viewing another item or closing the window.

Memos – one or memos have been saved for the selected record. To view these memos, use the Memos menu item. Memos can be added to the record regardless of whether this alert is displayed or not. If the Memos menu item is disabled, administrators have not activated the memo feature for the type of items being viewed.

User Fields – only appears if a value has been saved for the selected record in a User Defined Field. Since these fields are extensions of the information stored in an record, it is important for the user to view these values by using the User Fields menu item. Please note that the value(s) may be in a tab other than the one that is initially displayed in the User Fields popup window. As with Memos, new data can be entered into the User Fields whether or not this alert is displayed as long as the menu item is enabled.

Between each program unit’s menu and Status Bar are the components that are used to view and edit the information stored in each database record accessible by the program. The following section contains general descriptions of the components that the user will operate while using the application. Subsequent sections of this manual will provide details on how these components relate to each specific program unit.

Checkboxes

These components allow the user to indicate if a condition is true or false – such as whether a particular option should be turned on or not. If a checkbox is checked, the condition is considered true, whereas a blank checkbox is considered false. Adjacent to each checkbox is a label that indicates the condition that the checkbox represents. Checkboxes may appear singularly or together as a group of related options. An example of which is illustrated in Figure 12:

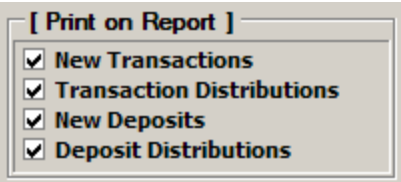


Figure 12: sample checkboxes.

Even though the four checkboxes shown above are grouped together, any combination of these can be checked and unchecked. In other words, grouped checkboxes are functionally no different than a single checkbox. Instead, they are grouped together to assist the user in making related decisions. To change whether a checkbox is checked or not, simply left click the box. After a checkbox has been clicked, its corresponding label will be highlighted to indicate that it was the last component used. It is important to note that some checkboxes in the MSC software are read-only and cannot be changed. Boxes such as these indicate the state of a

condition that the user cannot change from within the program unit that is being used; an example would be whether the selected account is a vendor or a customer.

Date-Time Editors

To assist users in selecting dates, this software features a specialized component that includes a built-in calendar. Users left-click on the date within the calendar to make their selection; the component then enters this date into the field automatically.

As shown in Figure 13, date-time editors consist of three parts: the label, the field and the drop-down calendar. While the first two parts are always visible, the calendar is hidden until the button with the downward pointing arrow inside the field is left-clicked. As stated above, the date is selected by left clicking on the desired date or by using the left and right arrow buttons on the keyboard followed by the Enter key to make the selection. Users can quickly specify the current date by clicking on the Today button beneath the calendar. The Clear button erases any previously selected date from the calendar. To select another month or year, use the Previous/Next buttons on either side of both the month and year displayed along the top of the calendar. Please note that the currently selected date is highlighted with a colored box (the color of the box will depend on the system colors of the computer that is being used).

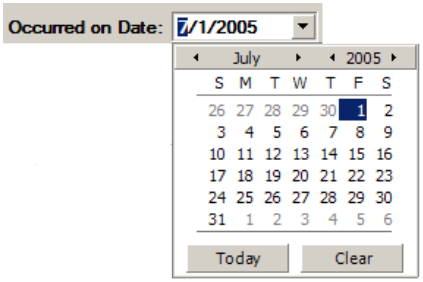


Figure 13: an example of a Date-Time Editor.

Users do not have to use the calendar to make a selection; the appropriate date can be typed directly into the field. Dates can also be pasted directly into the field using the corresponding keyboard shortcut.

Drop-Down Lists

Drop-down lists provide built-in lists of the possible values that can be inserted into a field. These components decrease the time it takes to enter information while insuring the integrity of the data being entered. The values in these lists can come from two sources – values that are included in the software and those that come from data entered by users into other program units. For example, a drop-down list of vendors would comprise of all vendors currently saved in the division that the user is currently logged into. Since the values that define these lists can be changed by other users at any moment, those drop-down lists that display values from the database can be updated using the Refresh option in the component's context menu. Right click on a drop-down list component to display this menu.

Like date-time editors, drop-down lists consist of three distinct parts: an identifying label, a field to contain the selected value and the drop-down list of values. The label identifies the type of information that will be stored in the field while the field displays the currently selected value. Both the label and the field are always visible while the list is only displayed after the button with the downward pointing arrow within the field is left clicked.

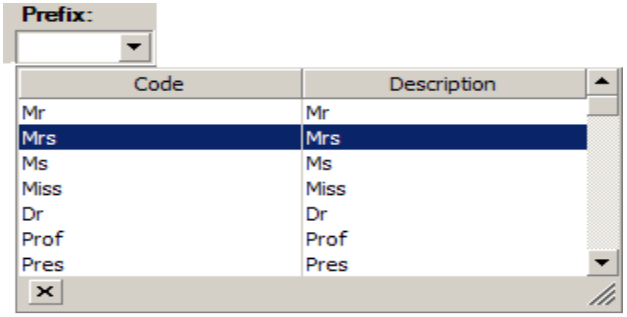


Figure 14: an example of a drop-down list.

Once the list is displayed, the user makes a selection by left clicking on the desired value or by using the Enter key on the keyboard when the desired value is highlighted. To navigate the list, use either the vertical scroll bar displayed along the right side of the list or the up and down arrows on the keyboard. The list may be enlarged by dragging the lower right corner of the list outward. Clicking the “X” button in the lower left corner will cause the list to close.

The entries that appear in the list can be filtered by typing the first letter of the desired entries. For example, typing the letter “M” into the drop-down component displayed above would cause only the following prefixes to be displayed: “Mr”, “Mrs”, “Ms” and Miss.” Additional letters can also be entered to further filter the list. Instead of using the drop-down list to select the desired value, the user can also type in the full value if it is known.

Grids

Grids are used throughout the software to display information about a group of related items. Users familiar with spreadsheet applications, such as Microsoft’s Excel, will be familiar with the basic structure of a grid. Down the length of a grid is a row for each item in the group. The columns across the width of the grid list display information related to the subject identified by the column heading. A cell is the intersection of a row and a column with each cell displaying a specific attribute of the row item. See Figure 15 and its accompanying text for an example of how information is organized within a grid.

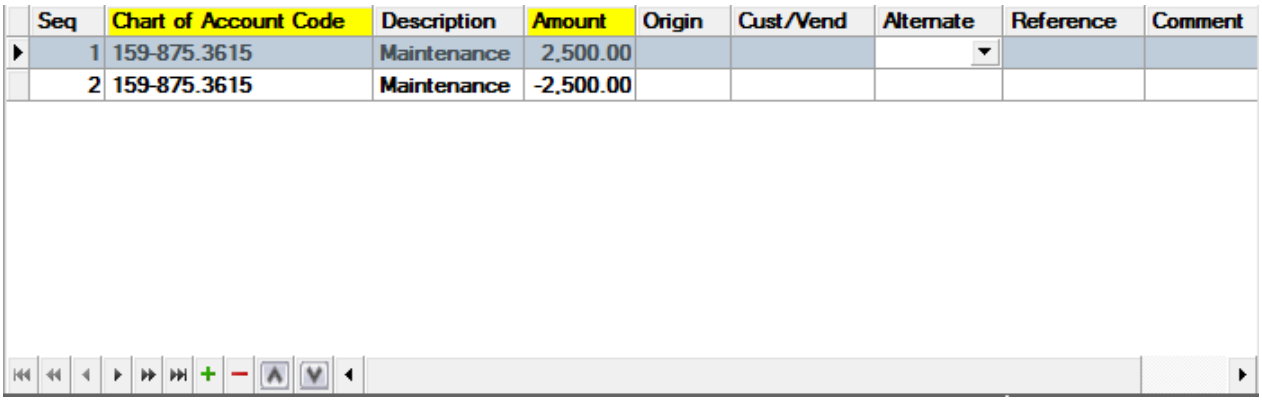


Figure 15: the columns in this grid are highlighted in yellow while the rows are shaded orange. Most cells in the first row are highlighted in blue because that row is selected.

There are two rows listed in the grid depicted in Figure 15 Each identifies an account that a vendor contact is associated. As stated previously, cells are the intersection of a row and a column. Consequently, the cells within a row provide information about the corresponding account. The column headings (“Account Code”, “Account Name”, “A/P”, “A/R” and “Relationship”) describe the contents of each cell in the column. For example, all values within the “Account Name” column will contain the name of the account represented by each row. The user can change the selected row in one of three ways:

1. Left clicking on the desired row using the mouse.
2. Using the Up and Down keys on the keyboard.
3. Pressing the buttons on the Navigator.

Resizing Columns

The columns within a grid can be easily resized to increase the visibility of large values. Multiple columns can be resized, one at a time, as necessary. To resize all columns simultaneously, use the Best Fit (all columns) feature – which is accessed from the context menu that appears when a column heading is right clicked – instead.

To resize a column in a grid, move the mouse cursor to the right or left edge of the column to be resized. The mouse cursor should change from an arrow to two converse arrows (see Figure 16 for an example). Next, hold down the left mouse button while moving the mouse away from the column. A vertical bar will move with the cursor to indicate the new edge of the column. When the desired position of the column border has been reached, release the mouse button.

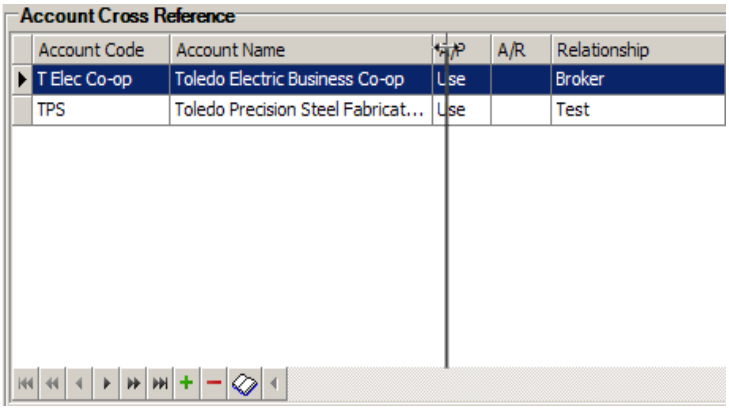


Figure 16: a column being resized.

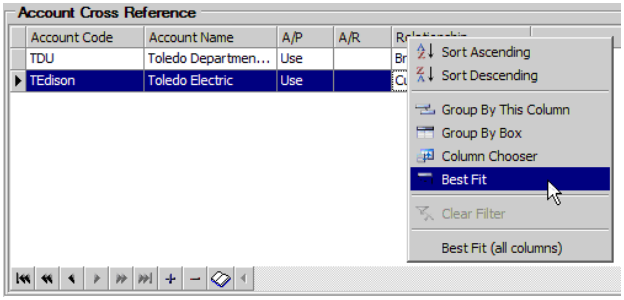


Figure 17: an example of using the Best Fit feature. In this example, the “Relationship” column will be resized using this feature.

Using the Best Fit menu item, the software can adjust a column’s width to fit the largest value contained in the specified column. To display this menu, simply right click on the heading of the column whose size will be adjusted.

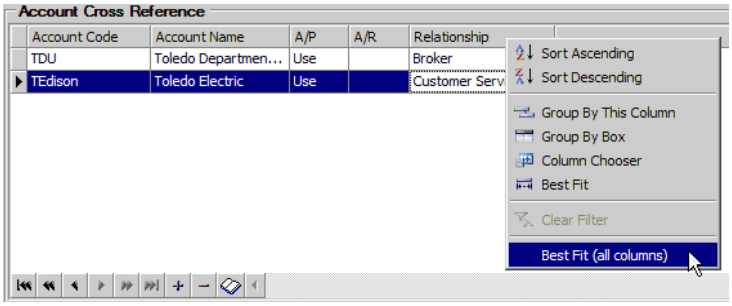


Figure 18: an example of using the Best Fit (all columns) feature. All columns in the grid will be resized.

Best Fit (all columns) – this feature adjusts the size of each column in the grid so that the largest value contained in each column is displayed. However, the user may need to scroll the grid horizontally to view all of the columns contained in the grid. To do this, select the Best Fit (all columns) item from the context menu that appears when any column heading is right clicked.

Changing a column's sort order

The user can adjust how rows are ordered within a grid in one of two ways. Left clicking on a column heading that is not currently sorted will cause the grid to be sorted by the column in ascending (A to Z; 0 to 9) order. Clicking on the same column again will cause the sort order to reverse to descending order. Additional clicks will toggle the sort order between Ascending and Descending order. A column's sort order can also be set by using the context menu accessible by right clicking on desired column's heading (see Figure 19 for an example).

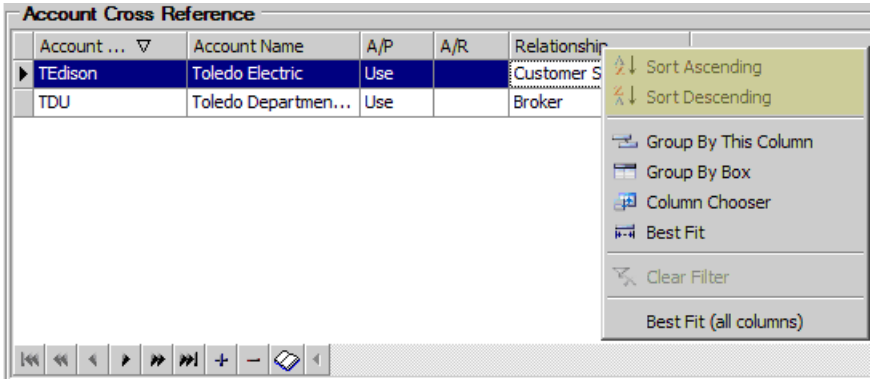


Figure 19: to specify a column's sort order using the context menu, select either the Sort Ascending or Sort Descending menu items. In order to assist the user in identifying the location of these items, they have been highlighted in this image.

Filtering data

Rows in a grid can be filtered by a specific value contained in any of the grid's columns. For example, a user may choose to filter a grid of transactions to only include those transactions involving a specific vendor. While each column in a grid may only be filtered by one value, multiple columns can be filtered at the same time. Continuing the previous example, a user may choose to the filter the transactions in a grid by vendor, type and due date. Clearly, the use of filtering allows users to rapidly view only the information most relevant to them.

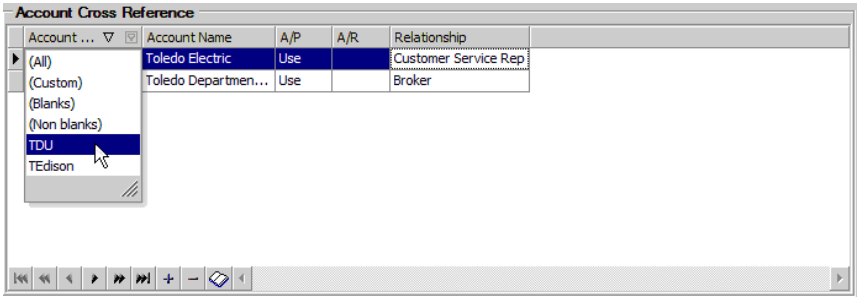


Figure 20: an example of filtering a grid. To display the filter menu, click on the button with the downward pointing arrow that is positioned in the right side of each column.

To filter a column, left-click on the Filter button located along the right border of the column heading. This button is identified by an icon that resembles a funnel; this icon only appears when the mouse cursor is positioned near it or if the column is currently being filtered. The value that will be used to filter the column is selected from the drop-down list that appears after the Filter button has been pressed. In addition to the four standard options described below, each list will also contain each distinct value currently used in the column. In Figure 20, the items "TDU" and "TEdison" represent the two cells listed in the "Account" column. Obviously, the contents of a filter menu will depend on the data displayed in a grid, including any filters that have been applied to other columns.

(All) – stops filtering the grid by the selected column.

(Custom) – allows the user to define a unique filtering expression. In the popup window that is displayed when this option is used, logical operators are used to create the filtering expression. For example, to focus a column on a range of dates, the user can create an expression similar to:

is greater than 3/01/2008 and is less than 6/30/2008

The grid would then display only those rows that contain a date within the filtered column that is between March 1st, 2005 and June 30th, 2005. While values used in the custom filter must be typed exactly as they appear in the grid, the asterisk (*) wildcard can be used to indicate that any values that begin with the letters typed before the asterisk will be included in the filter expression.

When defining a custom filter, select the logical operator from the drop-down list and enter the values to be compared into the field on the right. Please note that the And/Or radio button between the two logical operator drop-down lists determines how the two pairs of filtering criteria will be used together. See Figure 21 for an example of this window.

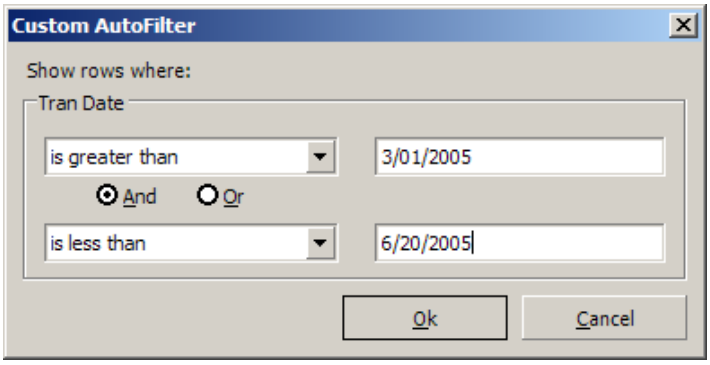


Figure 21: Custom grid filters are created using this popup window.

(Blanks) – when selected, only those rows that contain a blank cell within this column will be displayed in the grid.

(Non-Blanks) – filters out any rows that have a blank cell in this column.

As previously stated, any values that appear below these four menu items are dependent on the

values contained within the column when the filter menu is displayed. Consequently, if the grid is already filtered by another column, only those values that have not been filtered out will appear in the second column's filter menu. Once a filter is selected, the filter button will change color to indicate that the column is being filtered. Also, all filters that are currently being used are listed along the bottom of the grid – any of these can be removed by clicking the "X" button to the left of the filter expression. In addition to the two ways previously mentioned, filters may also be removed by right clicking on the header of the filtered column and selecting the Clear Filter menu item.

Run Time Customization

Grids in the MSC application are designed to display the most relevant information to the broadest possible audience of users. Consequently, some users may find that there are more columns used within the grid than they need. Recognizing that this may occur, most grids allow the user to remove unneeded columns and rearrange other columns to display information in the layout most suitable to the individual. Furthermore, each grid can save the current layout settings for each user; this layout is then used the next time that the grid is displayed. More details about saving and loading grid layouts is provided at the end of this subtopic.

Removing a grid column is accomplished by dragging the header of the column off the grid. To do this:

1. Press and hold down the left mouse button when the mouse cursor is above the column to be removed. The header will then have a "pushed in" look as if it were a button.

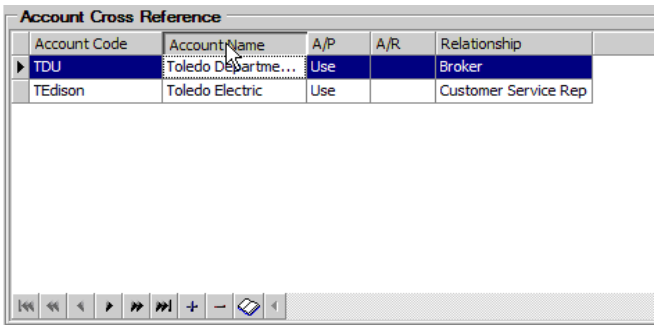


Figure 22: Left click on the column header to begin dragging it.

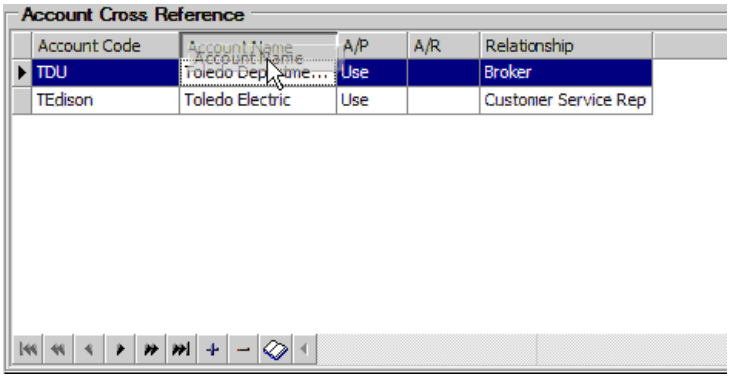


Figure 23: Continue holding down the left mouse button while moving the column header downward.

2. While continuing to hold down the mouse button, move the column header towards the bottom of the grid. As the mouse cursor moves, a transparent copy of the column header will follow it.

3. Once the header is moved past the last row in the grid, the mouse cursor will change to a black “X” over the trailing copy of the column header.

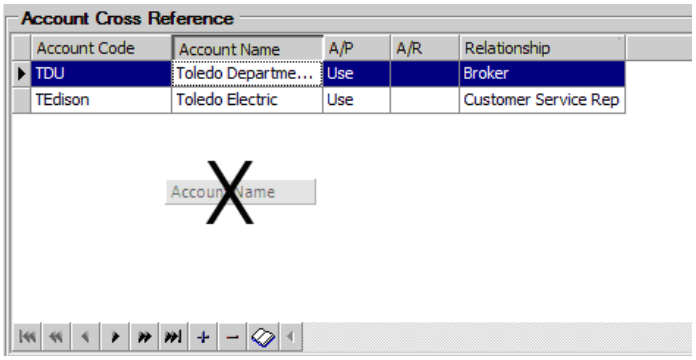


Figure 24: Once the column header has been moved past the last grid row, it can be removed by releasing the mouse button.

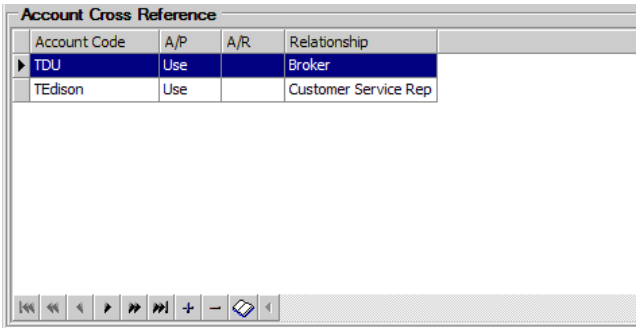


Figure 25: The column has been placed in the Column Chooser popup window and is no longer visible in the grid.

4. Releasing the mouse cursor at this point will cause the column header to be removed. For instructions on how to place the column back into the grid, see the next section of this subtopic.

Once a column has been removed, it is listed in a special component of the grid called the Column Chooser popup window. This window is hidden until the user accesses it by right clicking on any column header and then selecting the Column Chooser menu item. The popup window will then appear over the grid, with a list of any columns that have been removed from the grid.

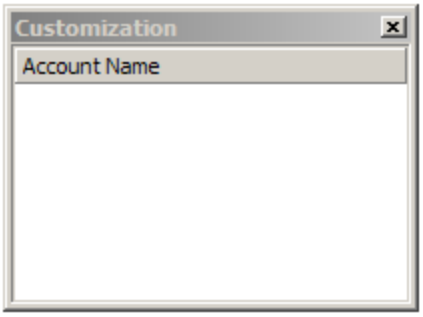


Figure 26: The Column Chooser popup window with the column removed.

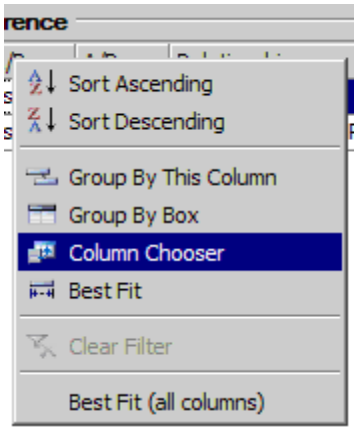


Figure 27: The Column Chooser menu item.

Restoring a column back to the grid is the reverse of the process of removing a column:

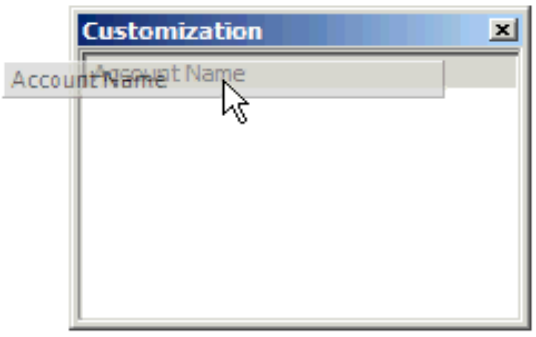


Figure 28: Beginning to drag the column header from the Column Chooser popup window to the grid.

1. Left click the desired column header in the Column Choose popup window and begin dragging (while holding down the mouse button) it towards the other column headers at the top of the grid.

2. Position the mouse cursor between the two columns that the dragged column should be placed between. An outline of the column header will appear over the position where it will be inserted.

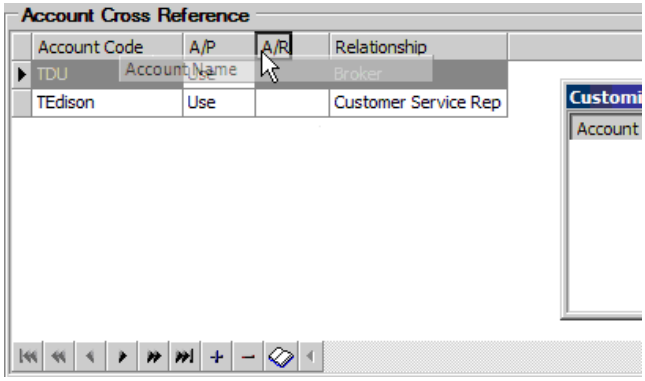


Figure 29: release the mouse button over the column's desired position.

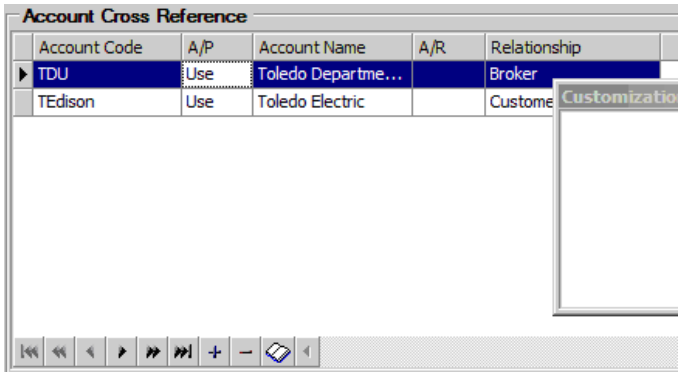


Figure 30: The restored column in the position it was dragged to.

3. Release the mouse button to insert the column.

In addition to removing columns, the layout of a grid can be rearranged by moving the position of columns within the grid. To move a column:

1. Hold down the left mouse button while moving the cursor towards the column's desired position.

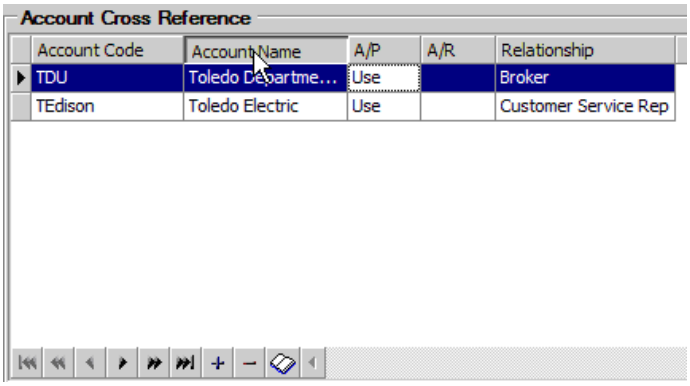
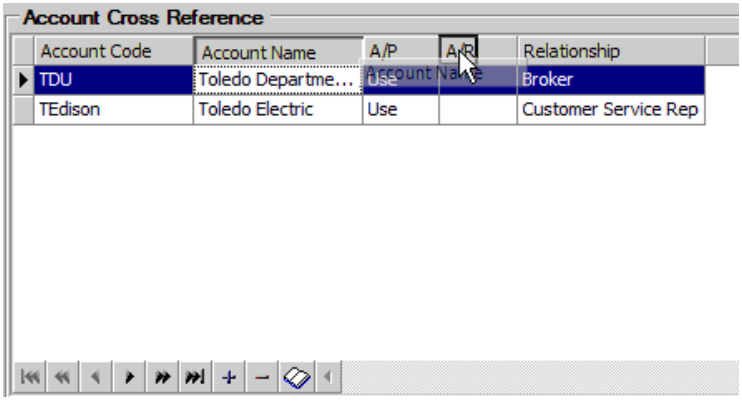


Figure 31: Begin to move the column by holding down the left mouse button and dragging the column header to the new location.



2. Release the mouse button once the header is above the desired position.

Figure 32: The column header is moved when the left mouse button is released.

3. The grid will automatically update the position of all other columns to accommodate the new location of the repositioned column.

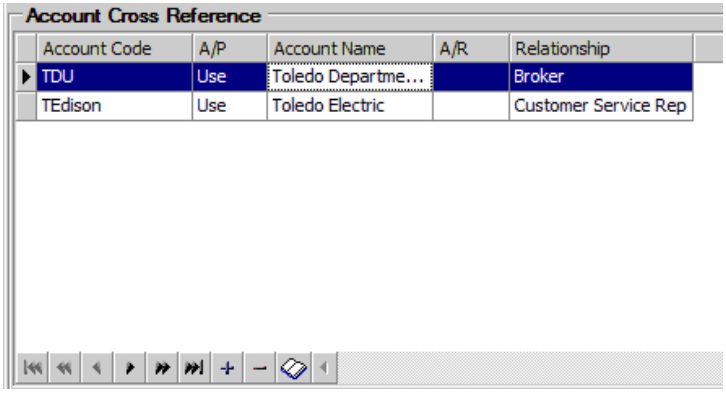


Figure 33: The column header in its new position.

Restoring Layouts

As mentioned earlier, grids throughout the MSC software automatically load any layout previously saved by the user. This allows users who have significantly modified the appearance of a grid to retain their settings for future use. Saving a grid layout is a straightforward process; however, the user should be aware that there are other considerations.

Only one layout can be saved for each user per grid. Consequently, the previously saved layout is lost when the user saves the new layout. Likewise, using the Reset menu item will cause the user defined layout to be replaced by the default layout – the layout which is used when there is no user defined layout for a grid. Therefore, these commands should only be used when the user is certain that the default layout should be updated.

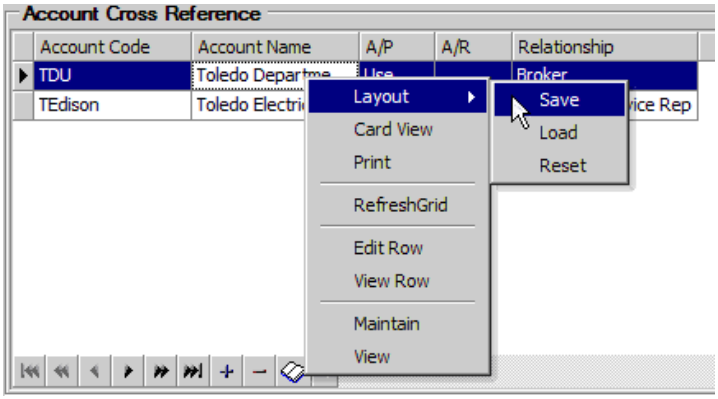


Figure 34: Clicking on any cell within a grid will allow the user to save the current layout of the grid.

To save the current layout of the grid, use the Save menu item that is part of the context menu's Layouts submenu; the context menu can be displayed by right clicking on any cell (not column header) in the grid. Once a layout has been saved, the grid will use the user-defined layout instead of the default layout each time that the program unit that contains the grid is opened.

Sometimes it may be necessary to retrieve the original user-defined layout if a number of changes have been made to the grid's appearance. This is done using the Load menu item of the Layouts submenu.

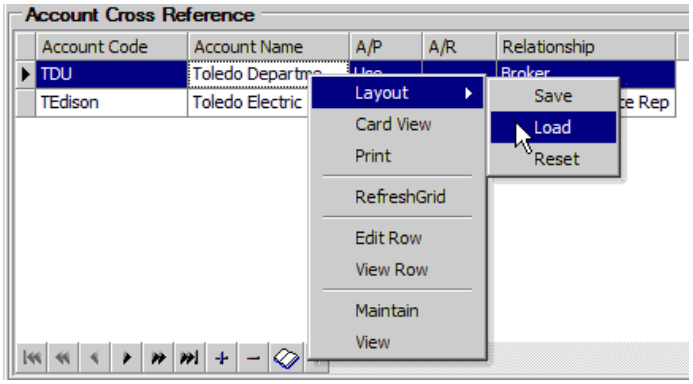


Figure 35: Clicking on any cell within a grid will allow the user to load his or her previously saved layout.

If a user no longer desires to use his or her saved layout, the Reset item in the Layouts submenu can be used to restore the grid's default layout and to permanently erase the saved layout. Please note that this action cannot be undone and the user must recreate the previously saved layout and then save it again if it has been accidentally erased.

Grouping – The rows listed in a grid can be grouped by the values in one or more columns to assist the user in identifying related items. For example, a user may choose to group a grid of account cross references based on whether or not the account/contact relationship is used in an Accounts Payable context. The rows in the grid are then grouped into two distinct collections: those that have an A/P use and those that do not (see Figure 37). Therefore, grouping a grid can be especially useful for those users who are working with a related subset of records that cannot be easily filtered.

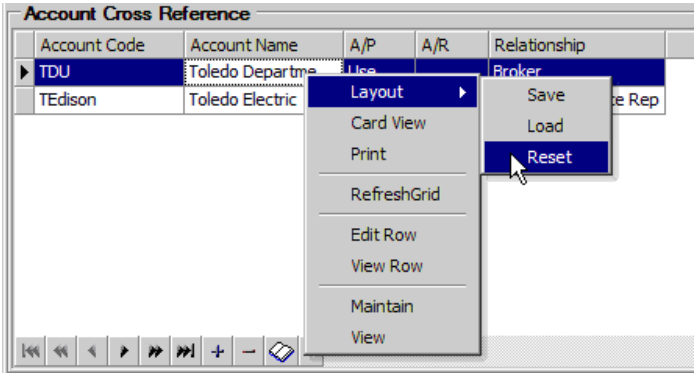


Figure 36: Using the reset button will replace the user's previously saved layout with the grid's default layout.

Unlike filtering, grouping a grid does not hide any rows. Rather, each row is added to a group that shares one of the values of the column being grouped. When a grid is first grouped, all of the group rows are collapsed - the individual rows are hidden within the group row - which allows the user to locate the desired groups. To view all of the individual rows within a group, click the Plus ("+") button in the desired group row. Similarly, an expanded row can be collapsed again by clicking the same button, which is displayed with a minus ("-") sign when the individual rows are expanded.

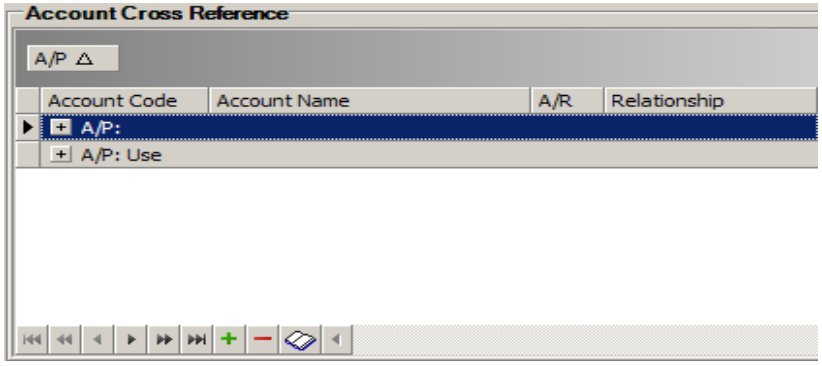


Figure 37: Two groups are created based on the possible values within the A/P column used to group the grid: "Use" and "A/P:" for no use. Note that none of the group rows have been expanded in this image.

Just as a grid can be filtered by multiple columns, a grid may also be grouped by multiple columns at the same time. When more than one column is grouped in a grid, each subsequent grouping is nested within the previous group. Therefore, each collection of items in the first grouping is subdivided by the second grouping. Continuing the previous example, since the A/P column creates two distinct groups (those with A/P use and those without) adding the A/R column as a second group will divide each A/P group into two groups: A/R use and no A/R use. The grid would contain up to a total of six groups – two A/P groupings and four A/R groupings (two for each A/P group). Please note that groups are only created if at least one row within the grid contains the value being grouped.

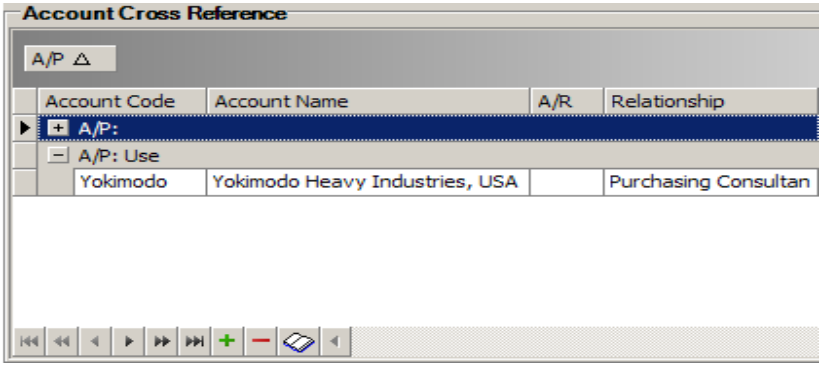


Figure 38: The first row (A/P:) is collapsed while the second group row (A/P: Use) has been expanded to display the row that belongs to the group.

See Figure 39 for how the grid would appear with two grouped columns.

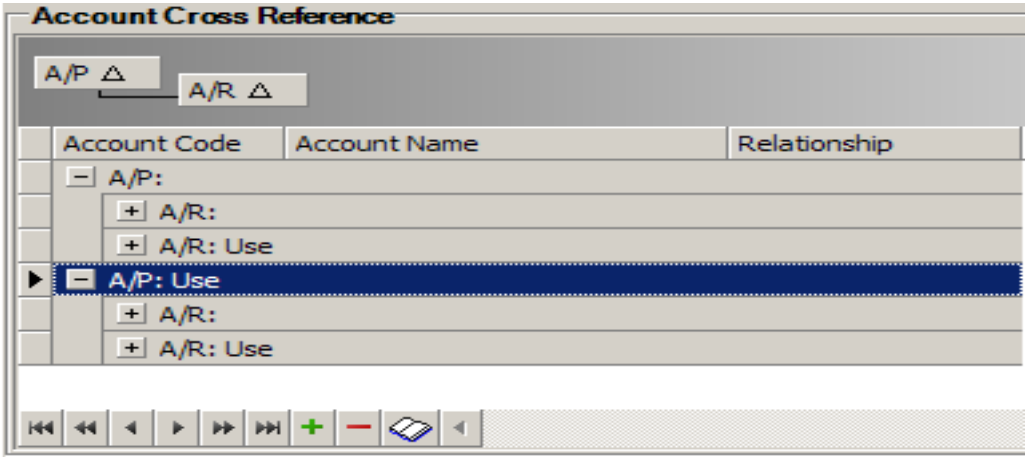


Figure 39: When a grid is grouped by more than one column, subsequent columns are nested within previous groupings. Note that both the A/P Use and A/R Use groups are divided into two A/R groups – those that have an A/R use and those that do not.

Group rows are automatically sorted in ascending order; however the user can change this by clicking on heading of grouped column. Each grouped column can be sorted independently of the other grouped columns. For example, one grouped column could be sorted in descending order whereas another can be in ascending order. In addition, non-grouped columns can also be sorted and filtered to control the appearance of individual items within each group.

Grids can be grouped by two different methods

Using either the Group By This Column menu item or the Group ByBox. Use of the Group By This Column command allows for more items to appear in the grid at one time while the Group By Box offers more flexibility. Both of these options are described below:

Group By This Column – this command is accessible via the context menu that is displayed when the user right clicks on a column header. As its name implies, this feature causes the contents of the grid to be grouped by the column whose header was right-clicked. If the Group By This Column command is used with more than one column, the groups will be nested in the order that the columns were grouped.

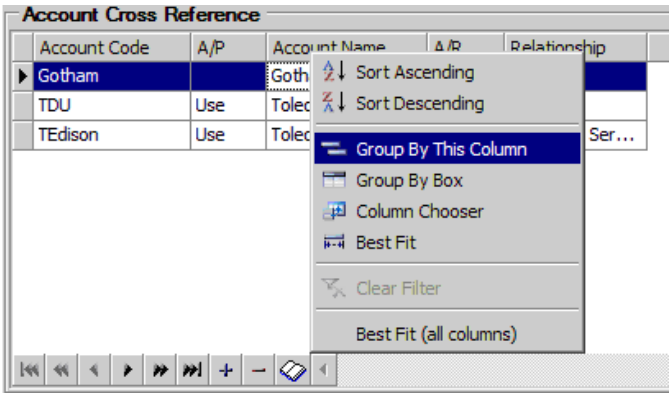


Figure 40: The Group By This Column command groups the grid by the column that was right clicked to display the context menu.

Since the Group By Column feature is available even when the Group By Box area is hidden, there is more space within the grid for rows. However, without having that area of the grid visible, users cannot change the sort order of the grouped columns or rearrange their nesting order. In order for these changes to be made, the Group By Box must be displayed using the appropriate command in the grid's context menu.

Group By Box – this portion of the grid is a shaded area that is positioned above the column headers. Depending on the size of the grid, the Group By Box may or may not be hidden in the grid's default layout. To display this area, right click on any column header and choose the Group By Box menu item (see Figure 41 below).

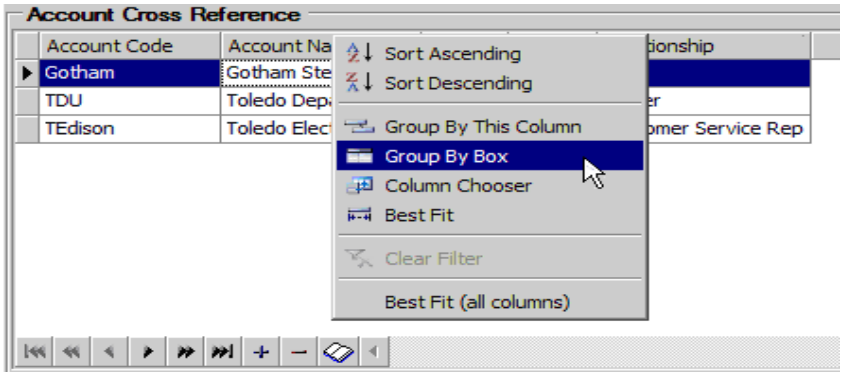


Figure 41: This menu item displays the Group By Box along the top of the grid, above the column headers.

Figure 42 and Figure 43 contrast how a grid appears when the Group By Box is hidden and when it is visible, respectively. Please note that the Group By Box can be hidden and displayed at any time. Thus, users can adjust the grouping criteria and then hide the area to display more items in the grid.

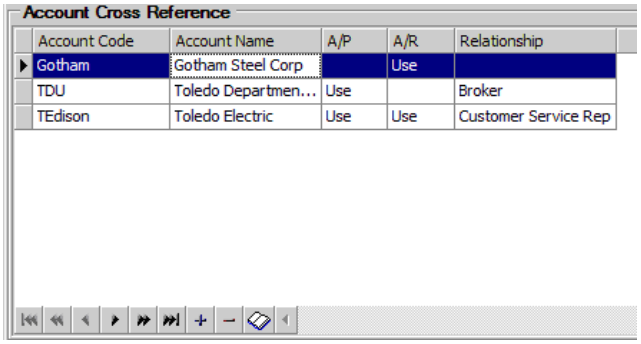


Figure 42: A grid whose Group By Box is hidden.

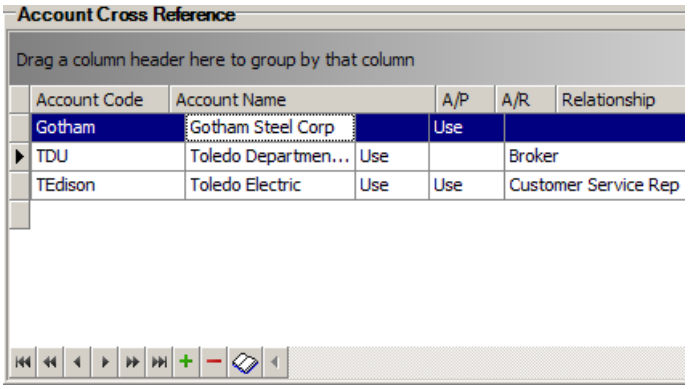


Figure 43: The Group By Box is the shaded area above the column headers in this grid.

Users can group and ungroup columns by dragging the headers of the desired columns to and from the Group By Box. When grouping columns using this method, the user should be aware that the order in which the columns appear in the Group By Box affects how groups are nested – see the next paragraph for more information about this. To ungroup a column, drag the header of the grouped column to the desired position within the ungrouped column headers.

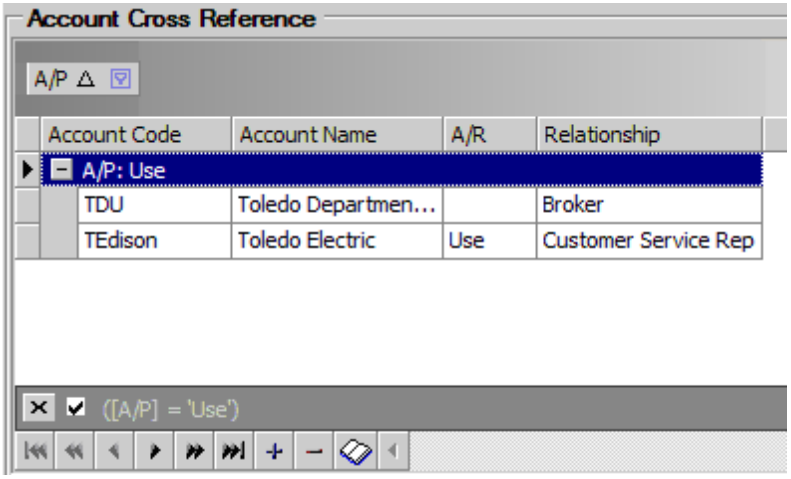


Figure 44: This grid has been filtered by the grouped A/P column to only include the collection of items that have the "Use" value in this column.

The order in which columns are grouped can be adjusting by changing the order of the columns listed within the Group By Box. The leftmost column header in the Group By Box will always be grouped first. Each column placed to the right of this column will be nested within the first column's groups – the farther to the right a column is positioned, the deeper it will be nested. Please note that each nested group subdivides any previous group by the number of distinct values within the nested group.

Changing the sort order of a grouped column is identical to changing that of an ungrouped column – simply left click on the column heading to switch between ascending and descending order. As previously stated, a column is automatically sorted in ascending order when it is grouped. It should be noted that the sort order of a grouped column affects all groupings and not just those that are currently

expanded.

Grouped columns may also be filtered to remove unwanted groups. For example, in Figure 44 the A/P grouped column has been filtered to only include the group of items that have an A/P use.

Grouped columns and their sort orders are saved as part of a grid's custom layout. Consequently, any saved groupings will be used each time the grid is loaded – such as when the grid's program unit is first opened or the grid's Load command is used. See the previous subtopic on restoring layouts in this section for more information on creating and loading grid layouts.

Card View

As an alternative to viewing items in a traditional row-based style, most grids in the MSC software offer the Card View style. In this style, each record in a grid is represented as a single card that displays both the column headings and the record's values. While cards can be sorted and filtered in this view, they cannot be grouped due to the nature of how the cards are displayed. Figure 45 illustrates how a grid appears in card view.

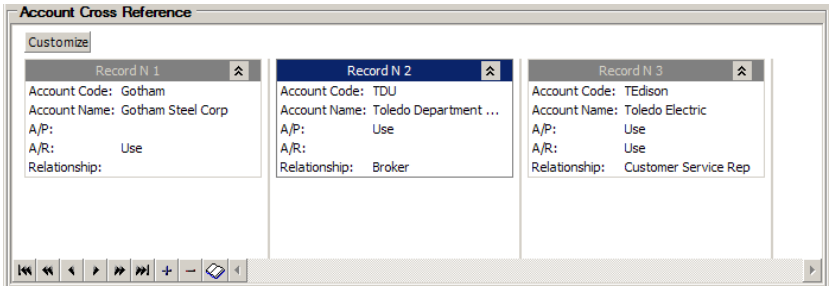


Figure 45: A grid displayed in the Card View format.

Although the appearance of the Card View is strikingly different than the traditional grid format, Figure 45 illustrates that each column heading and the record's corresponding value are clearly displayed. To use the Card View style, select the Card View item from the context menu that is displayed when the cells in a grid are clicked. To change from Card View back to the traditional style, use the Grid Viewitem within the Card View's context menu.

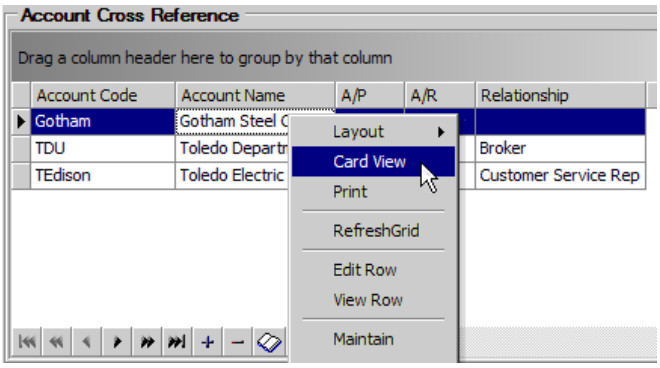


Figure 46: Use the Card View menu item to change from the traditional grid format to the Card View format.

It should be noted that a grid's Navigator behaves identically in either display style. In the traditional style, the Navigator's buttons are used to move from one row to another; whereas in Card View, these buttons move from one card to the next. Cards may be removed and added to the grid using the Navigator just as traditional rows.

As previously stated, grids using the card style can be filtered and sorted like those using the row style. However, instead of clicking on the column name to filter or sort a column's values, the user must use the

Customize button located in the upper-left corner of the grid. This customization feature displays a list of the grid's columns, each of which can be hidden, sorted or filtered using the corresponding controls.

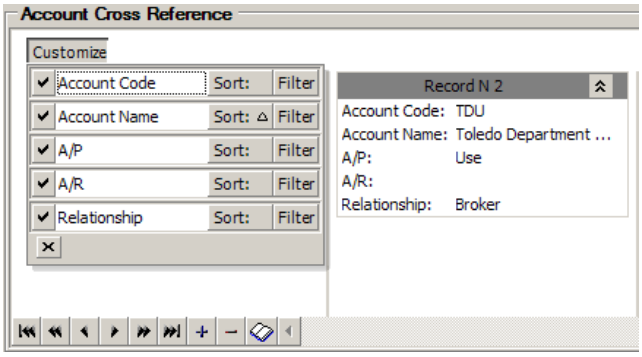


Figure 47: The Customize feature of the Card View display format. Note that the drop-down covers any card immediately below the Customize button.

As shown in Figure 47, to the left of each column heading is a checkbox which determines if the column and its value are displayed within each card; simply uncheck the columns that should be hidden. On the right of each column name are the Sort and Filter buttons that control which cards are displayed and how they are ordered. Just as with the traditional grid format, left clicking on the sort button will initially cause the cards to be sorted in ascending order by the values within the column. Any subsequent clicks will toggle the column's sort order between ascending and descending. Please note that once a column is sorted in the Card View, it cannot be unsorted until the user switches back to the traditional grid format. Filtering columns is identical in both grid display styles.

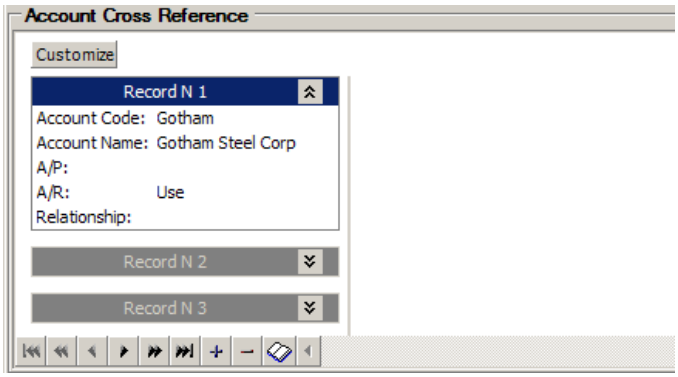
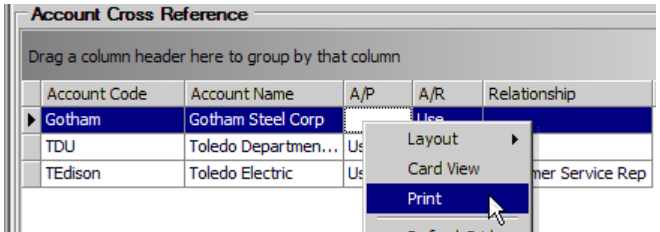


Figure 48: The highlighted card is displayed in its normal size. The two bottom cards have been minimized and, consequently, repositioned by the grid.

Given how cards are displayed, items cannot be grouped in Card View as they can in the traditional grid format. However, it is possible to hide a card's contents by minimizing it. This is done using the button with two upward pointing arrows that is located in the upper right corner of each card. To reduce the need for scrolling, any minimized cards are repositioned along the bottom of the grid. Figure 48 shows the difference between a minimized card and normal sized cards.

The Card View style is provided as an alternative to the traditional grid format. Its use depends largely on user preference and the type of information displayed within the grid. It should be noted that the print functionality built into these grids is based on the card view style. Therefore, regardless of which style a grid is displayed in, its printouts will be structured using the Card View style.

Printing Grids



menu that is displayed when any cell is right-clicked.

In the MSC software, the contents of most grids can be printed using the Print item within the context menu that is displayed when any cell in the grid is right clicked. Regardless of the current display format, grids are always printed in Card View format. Before the printout is sent to a printer, the Preview window is displayed to allow the user to select and configure the printer that will be used or to save the printout as a file in a variety of formats. See the Reports subtopic within the Window Basics section of this chapter for more details. Figure 49 shows the position of the Print item within the context menu.

Refresh Grid

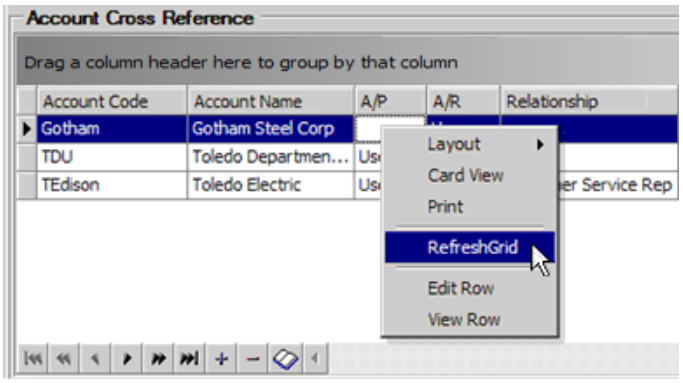
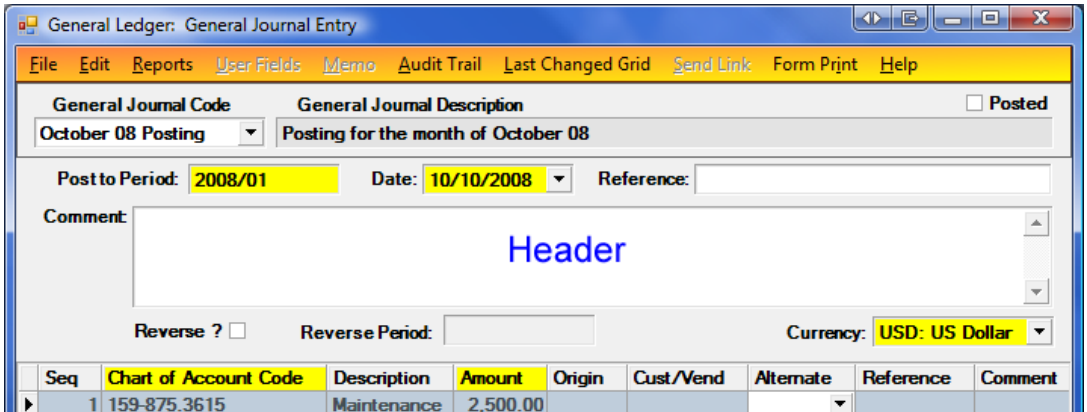


Figure 50: The Refresh Grid item is used to update the contents of a grid.

Since the MSC application will typically be used in environments where many users are accessing the same set of records, all grids used in the application have a Refresh Grid feature. This feature is used to update the records that are listed within the grid. One use of the Refresh grid feature is to update a grid in one program unit after the user created a new record in another program unit. Also, if a user has been working with the same grid for a long time and the information it contains is updated frequently by a number of users, it may be beneficial for the user to refresh the grid periodically to insure all of the information is up to date. The position of this item within the context menu is shown in Figure 50.

Navigation Bar

The Navigation Bar is positioned in the lower right corner of many program units. The Navigation Bar is used to change the header record displayed within the window. As stated in the "Window Basics" section of this chapter, many program units have a header-detail relationship that links a record (such as an invoice, account or purchase order) to sub-records (details) specific to the header item. For example, a General Journal record is a header and each distribution within the entry is a detail. Therefore, the Navigation Bar is used to change which header (a General Journal record for example) is viewed. Figure 51 shows a header-detail relationship in the context of using the MSC software.



with that record.

In Figure 51, the selected General Journal Code identifies a specific General Journal record. The rest of the window's components display information related to the selected entry. Consequently, if another code is selected, the rest of the components will be updated accordingly. As discussed above, the Navigation Bar allows the user to move from one general journalcode to another. In contrast, the Navigator within the grid in the Details area of the image will only scroll through the rows within the grid which, displays the distributions that are currently defined for the selected code.

A Navigator is included in most grids to assist the user in selecting rows within the grid. This Navigator bar switches between grid items. In addition to changing which row is selected, the Navigator also allows the user to add and remove rows and may provide additional features specific to certain programs units. Refer to the section on the Navigator Bar for more information. As shown in Figure 51, a selected row is highlighted in the Microsoft Windows default system color.

The following is a description of each of the buttons that make up the Navigator Bar. All relational directions that are given are based on the currently selected record's position within the drop-down list of header records. In most case, the header record is identified by a code, as illustrated in Figure 51.

Menu Command	Toolbar Icon	Description
FirstPage		displays the first header record.
Previous Page		moves to the header ten positions above (in the list) the selected record.

Menu Command	Toolbar Icon	Description
Previous		displays the previous header record.
Next		advances to the next header record.
Next Page		moves to the header record ten positions below (in the list) the selected record.
Last		displays the bottommost record in the list.
New		creates a new header record. When this command is used, the Edit Code window is displayed to assist the user in entering a valid cold and description.
Delete		removes the currently selected header record from the system. All of the header's details and associated cross references will be deleted as well.
Save		whereas most detail records are saved automatically, users must manually save header records using this button. If the user does not save the record before closing the corresponding program unit or attempting to view another program header, the software will display a warning message. In this message, the user is given one last opportunity to save the new header record (or changes to any existing header). If the header record is not saved at this time, all information that was entered for the record will be permanently lost.
Refresh		just as drop-down lists and grids can be refreshed to reflect any changes that have been made to the database after the component loads, so too can header records. This command can be especially useful in those instances when a user has left his or her computer for awhile and wants to insure the accuracy of the data upon return.
Sort Up		exchanges the position of the selected row with the row above it. This button and the Sort Down button are useful when the order of the items displayed in the grid is important, such as the chemical compositions within a heat. This button will not appear in grids where the order of the items is not important.
Sort Down		swaps the position of the selected row with the row below it. This button will not appear in grids where the order of the items is not important.
Expand		enlarges the grid, usually by covering an adjacent grid or panel of controls. Use this button to view more rows at one time. This button only appears in those grids that can be expanded without covering required components.
Restore		restores an expanded grid to its default size. Any grid or other components that have been covered by the enlarged grid will become visible again. This button only appears in those grids that can be expanded without covering required components.
Additional		adds additional material to the grids. In the middle grid it adds all material at that location regardless of line. This would allow a user to schedule to a different line than the applicator selected. In the bottom grid is adds all material regardless of location.

Note: *Any changes that were made to the record that were not saved will be lost when the data is refreshed.*

Radio Buttons

Named after the buttons that were common on many older car radios, these buttons allow the user to

select one of multiple exclusive options. For example, many program units that producereportsuse these types of buttons to allow the user to select the format of a report. Since a copy of a report can only be in one specific format, the user may select only one of the several formats that are offered. Typically, radio buttons are grouped together to assist the user in identifying the possible choices. An example of this is shown in Figure 52.

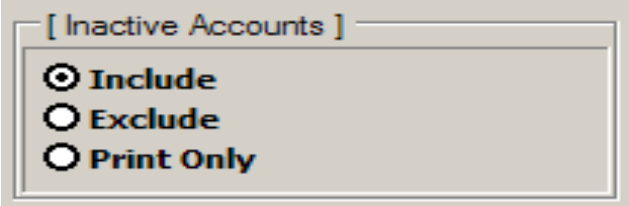


Figure 52: A group of radio buttons - only one of which can be selected at any time.

To make a selection, simply left click on the button, which is to the left of its name. A selected button will be identified with a dark circle. For example, in Figure 52, the Include option is selected.

Spin Editors

These components are used to reduce the time it takes to enter numeric values and to insure that those values are within an acceptable range. For example, a spin editor may be used to select the number of days a late shipment may be received. In most case, spin editors are limited to a narrow range of numbers because it is often quicker for users to type in large numbers than to use the spin editor's integrated controls. An example of this component is shown in Figure 53.

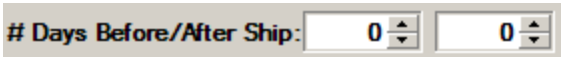


Figure 53: Two Spin Editors that have the same label. Users can type the number into the field or use the buttons to the right of the field.

To enter a value into a spin editor, the user can type directly into the editor's field or the Up/Down buttons may be used to scroll through the list of possible values. When the buttons are used, the button being pressed will stop once the corresponding limit of the range of values has been reached. For instance, the Down button will no longer decrement the number once zero has been reached in those spin editors that do not allow negative numbers. To prevent the user from scrolling past the desired number, a spin editor's buttons use variable speeds. When a button is initially held down, the buttons will slowly change; however, the longer the button is held down the faster the numbers will be adjusted.

Tabs

As an organization tool, tabs help improve users' workflow by combining related components onto a

single page. Since only one tab page is usually visible at one time in any given program unit, the user only has to focus on a single group of information. Generally, there is a logical flow between tabs and users will perform all necessary tasks on one tab before advancing to the next. Figure 54 illustrates how tabs are used.

To change which tab is selected, left click on the desired tab. As shown in Figure 54, the appearance of the selected tab is different than that of the other tabs which allows the user to quickly identify the tab that is currently displayed. Please note that switching between tabs may not change the entire appearance of a window. Often there will be components that are not part of any single tab because they apply to all of the tabs used in the window.

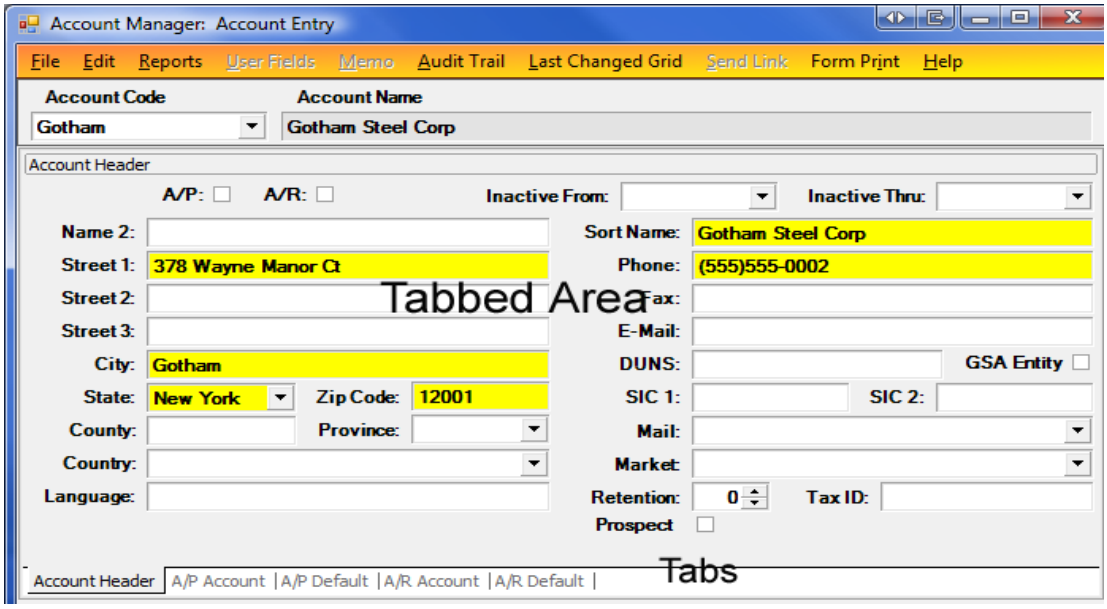


Figure 54: The components displayed within the tabbed area are dependent on which of the five tabs is selected. Once a tab is selected, the tabbed area is updated to reflect the change. Switching tabs does not affect which header record is selected.

Time Editors

Another type of spin editors that are used in the software are the time editors that allow users to enter a specific time of day. Users are able to specify the hour, minute and second as well as whether the time is AM or PM. Time editors are used throughout this application to assist the user in quickly and accurately entering times. An example of a time editor is shown in Figure 55 below.

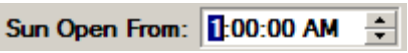


Figure 55: An example time editor. The label to the left of the field describes the expected content. Like with a spin editor, the user can enter a time directly into a field or use the buttons to the right.

The time that should be entered within an editor is described by the label to the left of the editor's field. The time value is appeared within this field while the buttons to the right of the field are used to increment/decrement the selected time period. One important difference between these editors and spin editors is that a time editor's buttons only adjust the selected portion of the time. Using Figure 55 as a reference, the buttons will only change the hour portion of the time. Consequently, to change the minutes in the example, the user would need to select the minute portion with the mouse or using the right arrow key on the keyboard.

While the time editor's buttons may be used to change whether the time is AM or PM, most users will find it quicker to type an 'A' or 'P' instead. Also, it should be noted that the buttons on a time editor will cause the value to go to the beginning of its range when the value is at the end. For instance, pressing the Up button when the hour is at twelve will cause the hour to change to one.

Buttons

Buttons are used to perform a specific task or to cause an event to occur. Some examples include using an Edit Code button to change the name and/or code of a record, or to use a Print button to generate a report based on the criteria that the user has defined. In the MSC software, buttons are usually placed in a window's Status Bar (see the previous section of this chapter). However, they are also occasionally positioned with the other components in the center of a window. A button's appearance is largely dependent on its position. Status Bar buttons have no border, whereas buttons placed in other areas typically have a raised border. Samples of both border styles are shown below.

Figure 56: Examples of status bar and stand-alone button.

Since buttons placed on a window's Status Bar do not have a visible border, vertical separators are placed between these buttons to assist the user in pressing the correct button. The left image above this text shows three buttons within a Status Bar. Notice the separator to the right of each button.

Although the Stand-Alone buttons feature a raised border to indicate where they can be clicked, their behavior is identical to that of Status Bar buttons; a single left click will cause the corresponding action to take place.

Fields

The majority of the information used with the MSC application will be displayed and modified within fields – textboxes that typically contain a single value. Fields visually organize information by subject matter and simplify data entry by allowing the user to modify only those values that have changed.

Fields consist of two parts – a label that indicates the type of value to be stored and a textbox that displays the current value. The user enters a new value or modifies an existing one within this textbox. Some fields require values to be structured in a specific and consistent format (such as a phone number). Those that do incorporate a validation feature that prevents the user from entering values in an incorrect format. As shown in the image below, the validation warning appears as an exclamation point within a red circle.

Figure 57: a non-required field.

Figure 58: a required field displaying a validation warning.

However,in order to see why the value is incorrect and what the required format is, move the mouse cursor over the validation warning symbol. Please note that the record being edited cannot be saved until all required fields have values in the correct format. To assist users in determining which fields are required, the software automatically shades required fields with a color chosen by an administrator. In Figure 58, the Work Phone field is required because it is shaded in the yellow; and the First Name (shown in Figure 59) field is not as indicated by its lack of shading. The image below illustrates the contrast between those fields that are required and those that are not.

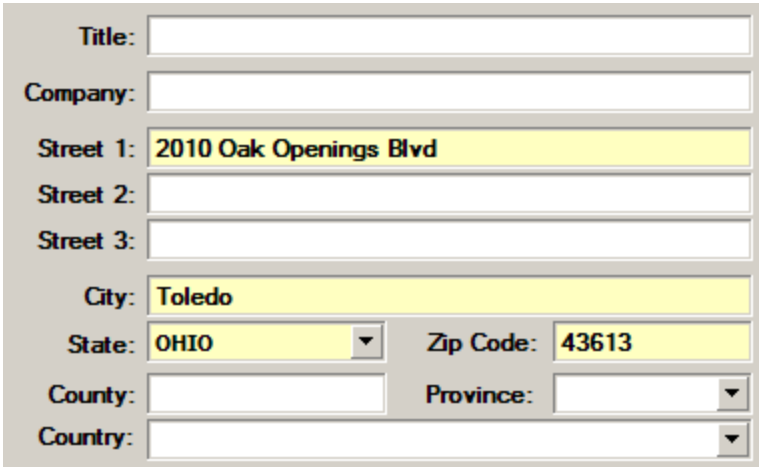


Figure 59: required fields (in yellow) contrasted with non-required (white) fields.

In addition to their distinct shading, required fields are also different from non-required fields in the respect that only required fields can be navigated to using the tab key. This allows users to quickly enter the information necessary to save a new record with a minimum number of keystrokes. However, non-required fields can still be accessed from the keyboard using the Up and Down arrow keys.

In some instances, a field will only display a value that cannot be changed from within the program unit being used. These fields will be read-only, which prevents any entry from being made. To maintain legibility, no visual distinction is made between read-only fields and those that can be modified.

Additional Sources of Help

In addition to this manual, there are several other sources of help information available to users of the MSC software. Each source provides its content in a distinct way to allow the user to locate information in the manner most suitable for him or her. The two other sources of help information is the applications online help system and the Quick Reference Guide.

The MSC software includes an electronic version of its documentation as part of its online help system. The content of this documentation has been modified to allow users to find related information quickly and easily. Hyperlinked text allows users to access related pages by clicking a specific word or phrase. In addition, many images include clickable areas that – when clicked - display information about the individual components shown in the image. For example, if the user clicks the image of a button, additional information about the button will be displayed to explain how the button is used. For a more thorough overview of the electronic documentation and tips on how to effectively search and navigate this extensive resource, refer to the help system's introductory topic.

As a separate manual, the Quick Reference Guide provides step by step instructions on how to perform many common tasks. Each task in the reference guide is outlined using images of the components that are used to accomplish the goal.As a reference, an image of the program unit that is used is also shown in order for readers to readily recognize where each component is located. Lastly, the topic will list any topics that logically follow the current task.

The subsequent chapters of this manual describe each of the software's modules. Whereas this chapter provided information on how the application is structured and how components are generally used, subsequent chapters will explain how the components described in this section are used to accomplish specific goals.

Glossary

A

Access Level

A numeric value assigned to user, units and other elements of the application software to establish security relationship between elements. For example, a user's access level is compared to a unit's access level to determine if the user may execute the unit. Access levels are assigned in the range of 0-32768, where 0 indicates greatest access.

Administrator

This user has unlimited access to the application software for the purpose of managing login and execution protection.

Audit Data

A collection of columns on all rows in all tables that contain the date, time, user and station in use when the row was created, last changed, posted and deleted.

C

Close

When clicked, this button will end a unit in an orderly manner.

Column

A single piece data related to an entity in the database. A column is a subdivision of a row. A column is similar to a field in a record in the legacy software.

Company

A company is the most significant element of a business structure supported by the database. Typically, a database will contain only one company represented by a single balance sheet in the accounting system.

Copy Protection

Limits access to the application software to licensed users and equipment authorized by Shared

Applications, LLC.

D

Data Selection Criteria

The data requested in a reporting unit that is used to select which rows are included on the report.

Default

A default contains a value or option that, once established in the database, is automatically used in a column during data entry unless overridden by the user, or that controls the operation of the software when multiple ways of performing a single function have been programmed.

Division

A division is an operating unit within a company which may have responsibility for a product, a production location, or some other subdivision of the company. All divisions of a company will be in the same database as the company.

DLL

Dynamically Linked Library

E

Error Log

A record of all errors trapped and reported by the application software when a situation or condition could not be handled by the software.

Execution Protection

Limits use of modules and units based on passwords and access levels established by the licensee's administrator.

F

Form

A form may be equated to the window that appears on the display screen when a unit is run, including all

of the labels and entries that it contains. An entry is also referred to as a field, and appears as a “box” on the form.

K

Key

A key is used to designate which column or columns may be used to access rows in a table. Every table must have a primary key, which is a software assigned sequential number in this application software. Every table will also contain at least one alternate key, which is a column that the user enters that can be used to access the row. There can be multiple alternate keys, and an alternate key can be constructed from one or more columns. A foreign key is a column in a row that contains a value that is the primary key to rows in another table.

L

Logical Name

The logical name is a phrase that describes a column in a row.

Login Protection

Limits access to the software to users authorized by the licensee’s administrator.

M

Memo

A row in a table that contains up to 4000 characters of free-form text related to a specific row in another table. All memos are stored in the same table.

Menu

A drop-down list, or a form with buttons, that identify all units in the application software and executes a unit when clicked.

Module

A module is a group of units that related to a common business activity. For example, a module may be the group of units that are used to manage accounts receivable, or to process sales orders. A module is similar to an application in the legacy software.

N

Navigation Bar

A collection of buttons, usually at the bottom left of a form, that allows the user to move through the rows in a table, or to add, change, or delete rows in a table.

P

Package

The units that make up this application software are organized in groups called packages. A package includes all of the units that make up a module, with the exception of this Software Startup module. A package may be equated to an “overlay” or “program segment” in the legacy software that is invoked and run as needed.

Physical Name

The term used to identify a column in a table. The physical name consists of a 2-character module identifier, a 2-character table identifier, and words that relate to the content of the column. For example, the company name (Name) in the company (CO) table in the administration (AD) module is ADCOName.

Printer

A printer is any device that can be used to output reports, including actual hard copy print devices, fax drivers, and disk files of various types. All real printers must be defined in MS Windows and appear in the printer setup dialogue.

R

Report Structure Options

The check boxes and radio buttons associated with options that will control the order, content or structure of a report.

Row

A collection of all columns containing data related to a single entity in the database. A row is subdivision of a table. A row is similar to a record in a file in the legacy software.

S

SQL

Structured Query Language (Pronounced “Sequel”)

Station

A station is made up of the hardware and software from which the user accesses the application software. A station may be a desktop computer or workstation, a thin client on a ms terminal services or citrix metaframe server, of a window under ms internet explorer. The terms station and workstation may be used interchangeably.

T

Tab

A visual element of a form that is used to layer data on the screen. The data associated with the tab becomes visible when the tab is clicked by the user. The tabs that appear down the right edge of a form always serve the same purpose and contain the same types of data. Tabs that appear horizontally near the top of some forms serve purposes specific to each form.

Table

A collection of all rows containing data of common content and construction. A table is a subdivision of a database. Also, a table is similar to a file in the legacy software.

Type

All data in a single column is constructed in the same way. The types of data used that may appear in a column are “integer” (a whole number in the range +/- 2,147,483,647), a “bigint” (a whole number in the range +/- 9,223,372,036,854,775,807), “float/bcd” (used to represent a numeric value that is accurate to a specific number of decimal positions, but may be handled differently among database servers), “varchar” (an alphanumeric column containing a variable number of characters, but limited to the maximum number of characters stated), “date” (contains the date, with the time in some database servers), “time” (contains the time, with the date in some database servers).

U

Unit

A form and its related program logic that can be selected from menu and executed by the user. A unit selected by the user may also invoke specify units to be executed. A unit is similar to a program in the legacy software.

Usage Log

A record of all units started by the user in a menu. The log includes when the unit ended, if the user properly closed the unit.

User Data

A collection of 10 number, 10 dates and 10 text entries that contain data related to a specific row in another table. All user data rows are stored in the same table.

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