Fourth Shift Basics
Fourth Shift Release 7.50

Fourth Shift Help
Release 7.50E

Important Notices

Fourth Shift Basics

Using Fourth Shift

The Fourth Shift program contains a wide variety of features allowing you to enter, view, and monitor the critical information that runs your business.

This section introduces the important terms and concepts you need to know to use Fourth Shift. It also describes the tools and options available to help you get the most out of the program.

Modules and Screens

The Fourth Shift system is made up of numerous **modules**, each supporting a particular business function such as Accounts Receivable or Shipping. Each module contains **screens** that help you carry out specific activities within the module. The modules work together to provide an integrated solution for your business.

Function Codes

Each screen has a unique **Function Code**, which is a four-character "shortcut" that identifies the screen. For example, the Item Master screen is identified by the Function Code "ITMB." Use the Function Code to open, or **go to** a particular screen.

Fourth Shift provides many mechanisms to help you move between screens. Because it is likely that you will be working with a limited number of screens on a regular basis, you will quickly learn the Function Codes for the screens you use most often.

The **Function** field is always visible when you are using Fourth Shift, appearing in the region directly beneath the toolbar. It displays the Function Code of the screen you are viewing. You can go to a different screen by entering that screen's Function Code and pressing **Esc**.

For more information, see Moving Between Screens.

Screen Types

There are several different types of screens you may encounter while working with Fourth Shift. Occasionally, the ways you use the program are different depending on the type of screen you are working on.

Entry and Inquiry Screens
A screen that allows you to add, change, or view business data is called an **entry screen**. Each screen is identified by a name and Function Code. Entry screens contain fields for entering or viewing data.

All screens contain four special elements directly beneath the toolbar:

• The **Function** field displays the four-character Function Code identifying the screen. It also contains a selection list that allows you to move to a related screen, menu screen, or Fourth Shift Explorer.

• The **name** of the screen is displayed beside the Function field.

- The **Status** indicator describes your current activity on the screen.

Status	Description
ADD	Adding new information
CHG	Changing information in open fields
INQ	Viewing information only; changes are not allowed

- The current **date** is displayed beside the Status indicator.

Many entry screens have read-only counterparts called **inquiry screens**. Inquiry screens contain the same data that entry screens do. The only difference is that data changes are not allowed on inquiry screens. You may be granted permission to access an inquiry screen if you need to view, but not change, data supporting a specific business function.

Scrolling Lines
Some screens contain **scrolling line** sections, in which information is displayed in a list format. Scrolling line sections are shown on the screen with a light background. They are set up like tables, with darker lines showing the boundaries between rows and between columns.

You can scroll backward and forward through the lines using the scrollbar, or the Up arrow and Down Arrow keys. You can also select a line by clicking it with the mouse. Each screen displays a finite number of lines at one time, so you cannot always view the entire list at once.

Scrolling line sections contain the following additional features:

- The **line marker** is an arrowhead symbol at the beginning of the active line, indicating your current location within the list.

- Some scrolling line sections display additional detail information about the current line in an **identification line**. The identification line appears beneath the scrolling line section.

- Many scrolling line sections have related detail screens that contain additional information about the line.

Detail Screens
Detail screens provide additional information about the active line in a scrolling line section. You can access a detail screen in a variety of ways, including:

- selecting it from the **Function** field

- clicking a transport button

- pressing a Function key, such as **F8**

When you are viewing a detail screen, the **Function** field displays the Function Code of the screen that contains the scrolling lines. You can return to the screen identified by the Function Code by selecting **Return** from the Function field selection list, or by clicking the **Return** transport button.

Windows
Related information about the screen you are viewing is often displayed in a **window**. Some windows can be opened from anywhere on the screen, while others can be opened only from a specific active field.

When a window is opened, it overlays the screen and cannot be repositioned. Close the window to redisplay the entire screen by pressing **Esc**.

Windows are typically used for special purposes, such as browsing, displaying detail, selecting from a list, or performing mass maintenance.

Batch Processes and Tasks

A **batch process** is a sequence of ordered **tasks** which perform specific actions. A task might generate a report, update a set of records, or import or extract data. The Batch Process Setup (BSET) screen is a special screen that allows you to set up batch processes.

Tasks may include required and optional parameters. Required parameters, such as date ranges, must be identified before you can execute a batch process. Optional parameters, such as whether to print a report, can be identified when needed.

Each task has a unique Function Code. When the Function Code for a task is displayed, the BSET screen shows the name of the task. When a batch process is displayed on the BSET screen, each task in the sequence has a separate line in a scrolling line section. The available parameters for the task in the active line are displayed on the screen.

Once a batch process is set up, you can execute it whenever necessary using the Batch Process Execution (BEXE) screen. For more information, see **Batch Processing** in the System Control manual.

Menu Screens

A **menu screen** lists a set of related screens and allows you to transport to each one.

There are two types of menu screens:

- M**aster menu**—lists the available modules.
    - Click a module name to go to that module menu.

- M**odule menu—**lists the screens that are available for a single module.
    - Click a screen or submenu name to go to that screen or submenu.

Menu screens list only the screens or modules that you have been allowed to access.

Fourth Shift Modules

Use the Fourth Shift main program to access screens in the following modules:

Module Name	Code
Accounts Payable	APSM
Accounts Receivable	ARSM
Advanced Price Book	APBM
Bill of Material	BILM
Cash Management	CSHM
CIM Customizer	CSTM
Custom Products Manufacturing	CPMM
EDI Services	EDSM
Electronic Data Interchange	EDIM
Engineering	ENGM
G/L Restructuring	RTSM
General Ledger	GLSM
Intrastat	ISTM

Module Name	Code
Inventory Control	INVM
Lot Trace/Serialization	LOTM
Management Reports	MGRM
Manufacturing Order Management	MOMM
Manufacturing Analysis	MMAM
Material Requirements Planning	MRPM
Multi-Currency	MCMM
Operations Performance	OPFM
Order Entry	CUSM
Product Costing	PRCM
Purchasing	PURM
Repetitive Manufacturing	RPTM
Sales Analysis	SAAM
Sales Order Processing	SOPM
Shipping	SHPM
Shop Floor Tracking and Reporting	SFRM
System Control	SYSM

The other modules in the Fourth Shift system use other programs to access their features, or provide features that supplement the main Fourth Shift program.

Fourth Shift displays the name of the module you are using. The module name directly relates to the active screen, with the exception of batch process tasks. The System Control module name is displayed for all batch process tasks in all modules.

In general, the screens and features in each module use the standard program features described in this manual. Any additional features that apply to a single module, or that have special meaning in a particular module, may be described in the online manual for that module. Consult the online manual for each module that you use regularly.

Accessing Fourth Shift

Before you can access Fourth Shift screens, you must have a **User Id** and **Password** assigned to you by your system administrator. Once you have these, you may open the program and use them to sign on to Fourth Shift.

Your User Id and Password give you permission to view a specific set of screens and modules, as determined by your system administrator. After you sign on to Fourth Shift, the Master Menu is displayed. It lists the modules you are allowed to access.

You can sign on to Fourth Shift directly or through the Fourth Shift Explorer.

- Click the **Start** button, and then point to Programs. Point to the folder that contains the Fourth Shift group, and then click **Fourth Shift** or **Fourth Shift Explorer**.

Using the Fourth Shift Explorer

From the Fourth Shift Explorer, you can go to every Fourth Shift screen you are allowed to access directly, without using menu screens. You can also access modules that do not require you to use the Fourth Shift main program, such as **Engineering** (ENGM) or **Shop Floor Tracking and Reporting** (SFRM).

Using the Start Menu

When you complete the workstation installation for the System Control (SYSM) module, the following shortcuts are created in the Fourth Shift folder in your **Start** menu.

- Fourth Shift
- Fourth Shift Explorer
- Fourth Shift Report Viewer
- Shop Calendar

Additionally, a **Help** folder is created in the Fourth Shift folder. This folder contain shortcuts that access commonly used online manuals.

Troubleshooting

- The Sign On screen also displays the product release level and names of Database Server, Lock Server, and SystemIdentChar of the server you are signing on to. This information is useful for troubleshooting should you encounter any difficulties in signing on.

- If you can not see the entire window once Fourth Shift opens, you may need to change some appearance settings.

  - If you want to change the appearance of the borders around open fields, see Removing Graphical Borders. Removing the borders will reduce the size of the window.

  - If you want to change the font or font size, see "Changing the Look and Feel" on page 42. Choosing a smaller font will reduce the size of the window.

  - If you want to use the desktop color scheme that coordinates with the Fourth Shift program, see Using the Fourth Shift Color Scheme.

Moving Between Screens

Several methods are available for moving between Fourth Shift screens.

- **Fourth Shift Explorer**
  Use the Fourth Shift Explorer to go to any screen or task in any application that you are allowed to access. You can also specify data values to be filled in when you go to a screen. For more information, see Using the Fourth Shift Explorer in this manual.

- **Master menu and module menus**
  The master menu lists the available modules.

  - Click a module name to go to the module menu.

  Each module menu lists the screens and tasks in that module that you are allowed to access. Some module menus also contain submenus.

  - Click the folder icon, screen name or function code to go to the selected screen or menu.

> **Note:** You can press **F5** to go to the "parent" menu of the screen or menu you are viewing.

- **Function field**
here are two ways to use the **Function** field to go to a screen:

    - Enter the function code for a screen or task and press **Esc**.

    - Click the arrow in the **Function** field to select from a list of related or detail screens. You may also use this method to go to a menu screen or to the Fourth Shift Explorer.

- **Transport buttons**
Click a transport button below the menu bar to go to a related screen or detail screen. Select **Display Explorer Menu Pane** from the **Options** menu to use this method.

- **Custom Toolbar Buttons**
Create buttons on the toolbar for the screens you use most frequently. See Customizing the Toolbar for more information.

- **Function keys**
Press a Function key (usually **F8**, **F9**, or **F10**) to go to a related screen. Use the transport buttons or the selection list in the **Function** field to review the function keys available for a screen.

- **Back button**
Click **Back** to return to a screen you have viewed previously, or right-click to select a screen from the list of screens you have viewed previously. Detail screens appear grayed and cannot be selected from the list.

    - To view a detail screen, select the main screen listed below it and enter key field data values. From there you can access the detail screen.

You can open other applications, such as those in the **Sales Order Processing** (SOPM) and **Sales Analysis** (SAAM) modules, by using custom toolbar buttons.

> **Note:** Remember to save any changes you have made before moving to a new screen. Data is not saved automatically when you change screens.

Entering, Editing, and Viewing Data

Fourth Shift is designed to allow you to enter and review business information quickly and easily. Most of the operations and techniques you need to use are typical for Microsoft Windows-based programs. However, there are some special considerations to keep in mind while using Fourth Shift.

Field Display and Editing

Each field has a label that describes the data in that field. Some field data can be changed, while some cannot. If you can change the data in a field, it is an **open field**. If you cannot change the data, it is a **closed field**.

Open Fields
Open fields allow you to update the information in the field as needed. A box appears on the screen for you to type into. In scrolling lines sections, open fields are shown in the active line only. Move to another line to see the open fields in that line.

The **active field** is the field you are entering data into, or are ready to enter data into. Many Fourth Shift features, such as Browse Windows and Field Help, are sensitive to the active field.

You can make a field active by clicking it with the mouse. You can also move between fields by pressing **Tab** or **Shift+Tab**. For fast data entry, select the **Auto Tab Between Fields** option in the Options menu. When you select this option, the program advances to the next field automatically whenever a field is filled with data.

For more information, see [Data Entry and Validation](#).

Open Fields with Selection List
Some open fields permit only a limited set of entries. These fields contain a small box in the lower right corner. When you move your mouse over the box, an arrow appears. Click the arrow to display the list of acceptable entries, which also shows a brief description of each entry. Select either the entry or the description to transfer the value to the field.

> **Note:** If you are using Net UI, descriptions for the acceptable entries are displayed only if you have downloaded the Fourth Shift Application Help component.

Closed Fields
Closed fields display the data value but do not allow you to change it. In this way, you can see important information while the system is protected from accidental changes or deletions. A closed field can never be the active field.

Working with Key Fields

When you first go to a screen, usually only a small number of fields are open. These fields are **key fields.** You must enter values for the key fields before you can access the rest of the fields on the screen.

Select **Save** from the **File** menu, or press **Enter**, after entering the key field values.

- If the key field values already exist in the database, the rest of the fields on the screen show the current data related to the key fields. You may make changes to any open field.

- If the key field values do not exist in the database, a new record is created. Enter the necessary related data in the remaining open fields.

Remembered Fields
Fourth Shift helps you retain values for key fields when you move from one screen to another. Whenever possible, the value from the key fields are carried over to the key fields on the next screen. This **remembered fields** is always active and does not need to be specially configured.

For example, if you go from the CUID (**Customer Master**) screen to the COCD (**Customer Orders by Customer ID**) screen, the value from the active **Customer ID** field on the CUID screen is carried over to the **Customer ID** field on the COCD screen. You can access information about that customer on any screen that requires a **Customer ID** key field without retyping the **Customer ID**.

If the next screen uses a different key field — location instead of customer, for example — the **Customer ID** value is not carried over. Instead, it is "remembered" and used the next time you go to a screen that uses Customer Id as a key field. Remembered field values are forgotten when you exit Fourth Shift.

Data Entry and Validation

The data you enter is considered temporary until you save it to the database. When you do this, the system may verify that the data is acceptable. In general, the system validates the:

- **format** of the entry. For example, did you enter a number in a field requiring a number?

- **logic** of the entry. For example, is the beginning date earlier than the ending date in a range of dates?

- **consistency** of the entry. For example, did you try to ship a customer order that is not ready to be shipped?

When a field entry is not acceptable, a message appears in the status bar and that field turns red and becomes the active field.

Data Format Types

Every field has a data format type, which defines how the data in that field is displayed, sorted, or used in calculations. The three main data format types are **alphanumeric**, **numeric**, and **date**.

- **Alphanumeric fields** can accept both letters and numbers, as well as most punctuation marks. Alphanumeric fields are not considered in calculations.

  Alphanumeric fields can accept certain values (P, M or C, for example, to indicate purchasing, manufacturing or customer orders), or only a specific range of values. Although alphanumeric fields are not considered in calculations, some may accept numbers only.

  The **tilde (~)** character is unacceptable and should not be used in data entry. Also, an alphanumeric field entry cannot have a quotation mark adjacent to a comma. This combination of characters causes processes that rely on log files or text file data extracts, such as data import and recovery, to malfunction.

- **Numeric fields** are used in calculations and can accept numbers and decimal symbols.

  In some cases when dealing with very large numeric amounts, a closed calculated field will display asterisks (*) or scientific numbers instead of a value. This condition affects only the display of the value; the supporting data is not changed in the database.

- **Date fields** are entered in a six-digit format based on the date format configured for your site. For more information, see "Date and Number Formats" in the System Control manual.

The valid date range is January 01, 1980 through December 31, 2079.

Required Entries

Some field entries are required so that the system functions properly. If you omit an entry in a required field, the field turns red when you try to save the data and the message

Entry is required in this field

appears in the status bar. Enter the required information and try to save again.

Default Entries

Some fields may have system-assigned or user-defined default entries that provide automatic entries for data elements. These default entries appear in open fields every time you begin using, or refresh a screen. You can change or delete a default entry at any time. Initial default values are not restored if they are changed or deleted.

- **System-assigned** default values are set up on system or module configuration screens. Because they affect the entire system, modifications to these default values should be made carefully.

Other system-assigned default values are provided automatically by Fourth Shift. These defaults cannot be modified.

- **User-defined** default entries are set up using default masks. Some screens allow you to set up temporary masks for a limited set of fields to speed data entry. For more information, see Default Data Entry Masks.

Using default values can dramatically increase your data entry speed, especially when entering groups of related information such as items in the Item Master.

Additionally, some screens support DEFAULT records with specific identifiers which supply default entries for the screen. For example, the ITMB (Item Master) screen allows you to define a

DEFAULT-ITEM. Values from the DEFAULT-ITEM are used as default entries for all new items. The following DEFAULT records are available:

Data	Default Record ID	Default Record Description
items	000000	DEFAULT-ITEM
workcenters	000000	DEFAULT-ITEM
vendors	000000	DEFAULT-VENDOR
customers	000000	DEFAULT-CUSTOMER
trade classes	DEFAULT-CLASS	default classification by industry type for customers
shipping addresses	000000	default ship-to
customer orders	000000	DEFAULT-ORDER
manufacturing orders	000000	DEFAULT-ORDER
purchase orders	000000	DEFAULT-ORDER
purchase order contracts	**PRICE-QUOTE**	default contract by vendor
banks	00	default bank
tax codes	99 = state and federal 999 = county and municipal	DEFAULT TAX CODE
invoices	**Ref No** = DEFAULT-INVOICE **Ref Seqn** = 0000	default invoice
credit memos	**Ref No** = DEFAULT-CR-MEMO **Ref Seqn** = 0000	default credit memo
walk-in cash sales	**Ref No** = DEFAULT-WALK-IN **Ref Seqn** = 0000	default walk-in cash sales
Product line	DEFAULT-PROD-LN	Default product line

Error Messages and Indicators

When you try to save data that is unacceptable or incomplete, the system provides error messages, warnings and indicators to help you enter correct information.

When an error condition occurs, a message appears in the status bar at the bottom of the screen, describing the nature of the problem. The field or fields triggering the error turn red and the first field in error becomes the active field.

Sorting Alphanumeric Data

The sorting of data in alphanumeric fields is based on the standard ascending order of the initial character in the field. Fields starting with numbers are listed before those starting with letters, starting from the left.

For example, the numbers 30, 60 and 360 are sorted differently if they are zero-filled from the left than if they are not.

Non-Zero-Filled Order	Zero-Filled Order
30	00030
360	00360
60	00060

Keep this sequencing in mind as you set up identifiers throughout the system.

Resizing Columns on a Screen

On screens that display data in tables or grids, you can resize the columns to view the full field. To resize columns:

1. Move your mouse pointer over the column divider line or grid of the table.
   The cursor changes to a double-headed arrow.

2. Click and drag the double-headed arrow to resize the column ( ).

   Column widths remain as set by the user after exiting the screen.

   - To reset the column widths to the original size, right-click on the grid and choose *Restore Defaults Grid Layout*.

Locating an Entry in a List

Many screens, such as the CUID (**Customer Master**) or ITMB (**Item Master**) screens, display lists that can be very long. On these screens, an open **Starting** field appears at the top of the screen.

- Enter a value and press **Enter**. The line in the list that most closely matches your entry will be displayed.

- Use the scrollbar or Up arrow and Down arrow keys to move through the list. This feature enables you to locate a particular entry in the list quickly.

- To see the first entry in the list, press **Enter** without making an entry in the **Starting** field. You can also see the first entry that begins with a particular number or letter by typing that character in the **Starting** field and pressing **Enter**.

Starting Over: Refreshing the Screen

You can return a screen to its initial state at any time by selecting **Refresh** from the **Edit** menu, or by pressing **Esc**. This clears all fields on the screen and allows you to enter new key values.

Note: If you have entered data on the screen but haven't saved it, those entries are lost when you refresh the screen.

Using the Mouse

You can use your mouse to complete the following actions:

Action	Description
Select a menu option	Click any menu to open it; click a menu option to select it.
Select a toolbar button	Click any toolbar or scrollbar button to perform the command.
Move to another screen	Click any transport button to go to the selected screen, or select from the list in the **Function** field.
Go to an open field	Click the field to move quickly to that field.
Select from a list	Click any item in a selection list to insert data into to an open field.
Select a row	Click anywhere in a scrolling lines section to go to the first open field in that row.
Select text	Click and drag over text in an open field to select it, or double click in any open field to select an entire word.
Open the Pop-up menu	Right-click anywhere to select an option from the pop-up menu.

System-wide Features

Fourth Shift offers a variety of system-wide features designed to provide flexibility and consistency across modules.

Printing and Generating Reports

Fourth Shift's reporting features are broad and robust. For example:

- Most Fourth Shift screens can generate one or more reports, many of which can be previewed before printing.

- Many batch process tasks generate reports that can be printed directly or saved as a file. Some external reports can be automatically sent to a business partner via email.

- You can specify report formats for selected print-outs. See the *SQL Server System Administration Help* for more information on these tools.

Automatic Email of Documents

Fourth Shift provides the ability to automatically email key business documents. There are five primary areas of setup required to enable this feature:

1. Customer/Vendor - for each type of document which supports automatic email, indicate whether they desire email, print, or both

2. Contacts - define and indicate if they wish to subscribe to receive specific documents for the customers or vendors that they are related to

3. Email Templates - define the actual subject and body of the email and whom it will be sent from

4. Email Infrastructure and Security - technical setup/configuration of email and necessary permissions

5. Batch Tasks - modify appropriate batch tasks (BSET) to include necessary parameters for generating emails

Customers and Vendors

The Vendor Report Option (VROP) screen in Purchasing and Customer Report Option (CROP) screen in Order Entry are used to maintain vendor /customer email preferences for all email enabled document types. Available settings are:

• Email - desires email delivery of report; requires that at least one contact for the customer/ vendor is properly setup to receive emails for that report

• Print - desires printed delivery of report (the default)

• Both - desires printed delivery of that report but also email delivery if any contacts have requested an email copy

Contacts

Contacts are created and maintained on three different forms depending on the type of contact. On these forms, you are able to define basic information regarding the contact, including an email address, as well as indicate whether this contact wishes to subscribe to receive document emails.

• Customer Contact (CCOT), Customer Contact Detail (F8 from CCOT), and Ship To/Delivery Location Contact Detail (F9 from CCOT)

• Vendor Contact (VCOT) and Vendor Contact Detail (F8 from VCOT)

• Internal Contact (ICOT) and Internal Contact Detail (F8 from ICOT)

Document email can be configured uniquely by document type for each customer/vendor and contact.

Email Templates

Email Templates determine the message content and sender of the emails that are generated. Optionally, internal recipients can be configured on the email template to be copied on each email that gets sent to customer or vendor contacts. Email templates are defined on the Email Template (ETPT) form in System Control. Separate templates may be created for each type of document that can be emailed. Multiple templates may be defined for each document type (for example, perhaps you want to use a different template for order acknowledgments during a sales promotion where information regarding the promotion is included in the body of the email). The actual template used will be determined by the template name specified on the batch task that is run.

Email Infrastructure and Security
Microsoft SQL Server Database Mail

The technology used to enable emailing for this feature is Microsoft SQL Server Database Mail. SQL Database Mail requires that a mail profile be defined from which the emails are sent. A default profile named FSMail is set up as part of the Fourth Shift server installation. Your administrator can setup any number of additional profiles using SQL Server Management Studio.

SQL Database Mail saves sent email in the msdb database, which is created during the SQL Server installation.

Report Administrator Security

The user defined as the report administrator (shown on the Report Admin tab of the Fourth Shift SQL Administrator utility) needs to be a member of the DatabaseMailUserRole database role in the msdb database in order for batch tasks to successfully send email. The server installation program does this automatically. Also, if the Fourth Shift SQL Administrator utility is used to configure a different Fourth Shift report administrator user, the new administrator is configured properly to allow successful sending of emails by batch tasks.

In addition, the user who is defined as the report administrator must have permission to use the Default Sender profile and also have read and write permissions to the folder specified by the AuxDataFiles or AuxRptFiles Fourth Shift configuration variables.

Batch Tasks

Add a parameter to each related Batch Task (BSET) if you wish to take advantage of the automatic email feature. Each batch task has two new parameters:

- Zxxx where xxx indicates the ID of the email template to be used

- X where X indicates that subscriber email should not be sent as a result of this run. Email will only be generated for those individuals explicitly included on the email template. This option is helpful when performing your internal testing of Fourth Shift's automatic email sending feature.

These parameters are now available with the following batch tasks to enable email of reports:

- Accounts Receivable Statements (ARST)

- Accounts Receivable Invoice Print (IVPR)

- Accounts Receivable Invoice Reprint (IVRR)

- Order Acknowledgements (BOPR - C (Customer Order) and P (Purchase Order) parameters)

In order to manage the database space required for sending email, the M option has been added to the RWFL (Database Table Row Purge) batch task so that sent email data stored in the Fourth Shift and msdb databases older then the specified number of days can be removed from those databases on a regular basis.

Viewing Status Messages

The status bar displays a single line of help pertaining to the active field when you select **Field Action** from the **Help** menu.

Messages are also automatically displayed in the status bar in two situations:

- Each time you enter a screen, the status bar message describes the first action to take.

- When you attempt an invalid entry, the status message describes the nature of the error.

Selecting from a Browse List

When you are using the traditional Fourth Shift system, the **Browse** features provide a way for you to select an entry for the active field by choosing from a master list. For example, master list entries could come from your Item Master, Customer Master or Vendor Master. Where you need to enter an item identifier, for example, you can browse for it rather than entering it directly. Browse lists typically display identifiers and descriptions, so you are not required to memorize identifiers.

When you are using Fourth Shift WebUI, the **Find** feature provides the method for selecting an entry for an active field. See Using the Find Feature for more information on using the searching within the Fourth Shift WebUI.

Browse Windows

You can open a **Browse** window from an active entry field by selecting **Browse/Detail** from the **Tools** menu, or by pressing **Alt+F4**. The **Browse** window contains the list of possible entries for that field. When you open a browse window from an entry field, the list begins with the value entered in the field, if any.

*   Scroll up or down to the desired line and press **Enter** to select from the list. The **Browse** window closes automatically and your selection is transferred to the entry field.

*   Press **Esc** to close a **Browse** window without making a selection.

*   Press **F5** to close a **Browse** window without making a selection and exit from the current screen.

From a Browse window for some master lists, you may be able to open a **Browse Setup** window, a **Browse Detail** window, or a **Standard Text Detail** window to get more information on the entries in the master list.

Browse windows are available in the following modules:

Module	Browsing Available For
Accounts Payable (APSM)	Banks Contacts Purchase Orders Vendors Vendor Invoices Vendor Contacts
Accounts Receivable (ARSM)	Banks Contacts Customers Customer Orders Items Ship to Ids Customer Contacts
Advanced Price Book (APBM)	Price Books
Bill of Material (BILM)	Items
Cash Management (CSHM)	Banks
Configuration of Interface Account Numbers (CNFA)	Product Lines
Custom Products Manufacturing (CPMM)	Customers Customer Orders Items

Module	Browsing Available For
General Ledger (GLSM)	Banks
Inventory Control (INVM)	Customer Orders Items
Lot Trace/ Serialization (LOTM)	Customer Orders Items Manufacturing Orders Purchase Orders
Manufacturing Order Management (MOMM)	Items Manufacturing Orders
Material Requirements Planning (MRPM)	Customers Customer Orders Items Manufacturing Orders Purchase Orders Vendors
Order Entry (CUSM)	Contacts Customers Customer Orders Items Ship to Ids Customer Contacts
Product Costing (PRCM)	Items Manufacturing Orders Purchase Orders
Purchasing (PURM)	Contacts Items Purchase Orders Vendors Vendor Contacts
Sales Order Processing (SOPM)	Customers Items
Shipping (SHPM)	Customers Customer Orders Manufacturing Orders Purchase Orders Ship to Ids
System Control (SYSM)	Buyers (Internal Contacts only) Contacts CSRs (Internal Contacts only) Email Templates Internal Contacts Items Templates

Browse Detail Windows

The **Browse Detail** window displays detailed information about an entry in the master list shown in the **Browse** window. Press **Alt+F4** from the Browse window to open the **Browse Detail** window. A selection for an entry field can also be transferred from the **Browse Detail** window.

- Press **Enter** to transfer the selection to the entry field and close the **Browse Detail** and **Browse** windows.

- Press **Esc** to close a **Browse Detail** window and return to the **Browse** window.

- Press **F5** to close both the **Browse Detail** and **Browse** windows without making a selection and return to the **Module Menu**.

Since Browse Detail windows can contain information that all users should not necessarily be able to see, security can be assigned to the windows using access codes on the FCMT (**Function Code Maintenance**) screen. For more information, see the "System Administration" topic of the module manuals containing **Browse Detail** windows.

See also Browse Setup Windows.

Browse Setup Windows

Some Browse windows also display a **Browse Setup** window. The **Browse Setup** window enables you to:

- locate a particular list entry or specify a starting point for the list

- select the sort order in which the browse list is displayed

- filter the information displayed in the list by specifying matching criteria

If you open a **Browse** window from an active field that contains no data, the **Browse Setup** window opens automatically. You can also open the **Browse Setup** window at any time by pressing **ALT+S** from the **Browse** or **Browse Detail** window.

Enter a value (or partial value) to start the master list in the Browse window. To close the **Browse Setup** window and return to the **Browse** or **Browse Detail** window, press **Ctrl+Enter**.

If the **Browse Setup** window allows you to specify a sort order for the master list, an asterisk (*) is displayed next to the sort option currently selected. You can select a different sort option for the master list by scrolling to the sort option desired and pressing the asterisk (*) key. Press the *up arrow* and *down arrow* to scroll in the **Browse Setup** window.

You can also use *matching criteria* to limit the number of lines included in the master list. Matching criteria can use any combination of alphanumeric characters and wildcard symbols. Wildcard symbols can be inserted anywhere in the search string and may be used as many times as needed. Entries that do not match the matching criteria are not displayed in the master list.

Several wildcard symbols are available for specifying matching criteria:

Wildcard	Purpose
*	used to match any sequence of zero or more characters
?	used to match any single character in a specific position
!	used to select entries that do NOT contain the characters listed after the wildcard symbol

To search for one of the wildcard symbols as a regular character, precede the wildcard symbol with a backslash (\). To search for the backslash as a regular character, precede the backslash with another backslash (\\).

Wildcard symbols can be used independently or combined to create the master list desired. Here are some matching criteria examples:

Desired List	Search String	Sample Match
All names listed as corporations	**Name** = *****CORP*****	ALLIED HDWRE CORP ABC CORPORATIONS
Any names ending with INC	**Name** = *****INC	JOHN'S TRUCKS INC SMITH BROS INC
Any names including HARDWARE and DIST	**Name** = *****HARD-WARE*****DIST*	XYZ HARDWARE DIST. HARDWARE DIST-100
Ids starting with "MN" followed by 3 characters ending with a zero	**Id** = MN???0	MN1000 MN2100

Using the Text Features

The text features in Fourth Shift allow you to build a library of text messages to be printed on documents or displayed internally.

Standard Text

The **Standard Text** feature allows you to build a library of text messages that can be used in multiple locations in the system. Text messages can be attached to records by entering an identifying text number.

Certain screens allow you to create or edit messages in a special text message area or from a Text Message window. Additionally, you can use the TEXT (**Text Review**) and TXWU (*Text Where Used*) screens to add, view, or modify existing messages in the library. You should periodically review the text messages in your system and delete any that are obsolete or unused.

For more information, see "Text Review" or "Text Where Used" in the *System Control* manual.

Usage

The following table lists the locations where text messages may be attached to records.

• **Source—**the screen or task where the message originates or is displayed.

• **Text Type**—indicates whether the message is associated with the manufacturing (M) or financial (F) library.

• **Destination**—the screen or document where the message is transferred automatically.

• **Transfer Conditions**—identifies the circumstances under which the message is transferred automatically to the **Destination**.

Source	Text Type	Destination	Transfer Condition
A/P Payment Detail	n/a	payment voucher	always
APCW	n/a	payment voucher	debit memo applied against invoice
APID	n/a	payment voucher	always
APIE	n/a	payment voucher	always
ARAD	n/a	printed statement	based on oldest aging category with a balance for that customer
Bill of Material Detail	M	Picklist Detail	always
CORV	M	displays on CORV only	always
Contract Header Detail	M	header section of printed contract	POCF/Vendor Configuration: **Print Standard Text on Ext Documents** = Y
Contract Item Detail/ Pricing	M	line item section of printed contract	POCF/Vendor Configuration: **Print Standard Text on Ext Documents** = Y
Custom Product Component Detail	M	customer job summary; customer order picklist; customer order routing	always
Custom Product Detail:			
- accessed from COMT	M	order acknowledgement	CNFG: **Print Text on Ext Documents** = Y

Source	Text Type	Destination	Transfer Condition
- accessed from CPMT	M	customer job summary; customer order picklist; customer order routing	always
Customer Financial Detail	M	displays on Customer Financial Detail only	always
Customer Name/ Address Detail	M	Customer Order Header Detail	always
Customer Order Header Detail	M	order acknowledgement	CNFG: **Print Text on Ext Documents** = Y
		shipping summary; shipping invoice summary	SHCF: **Carry CO Header Text Forward to SHIP Text** = Y
		CORV	always
Invoice Header Detail	F	credit memo; invoice	IVPR/IVRR task parameter
ITEM LOT RECEIPT window	M	LMST	LTCF: **Carry Item Lot Trace Text Forward to Lot Master** = Y
Item Master Detail	M	displays on Item Master Detail only	always
Item Lot Trace and Serialization Detail	M	LMST	LTCF: **Carry Item Lot Trace Text Forward to Lot Master** = Y
Item Master Planning Detail	M	displays on Item Master Planning Detail only	always
Manufacturing Order Line Item Detail	M	Line item section of printed manufacturing order	always
MOMT	M	MORV and header section of printed manufacturing order	always
MORV	M	displays on MORV only	always
Packaging Detail:	M		
- header section text		packing list	SHCF: **Print Text From SHIP on Packing List** = Y
- line item section text		box labels	SHCF: **Print Text From Package Detail on Box Label** = Y
Picklist Detail	M	printed picklist	always
Purchase Order Header Detail	M	header section of printed purchase order	POCF/Vendor Configuration: **Print Standard Text on Ext Documents** = Y
Purchase Order Line Item Detail	M	line item section of printed purchase order	POCF/Vendor Configuration: **Print Standard Text on Ext Documents** = Y
SBOL	M	printed Bill of Lading, shipping summary, shipping invoice summary	SHCF: **Print Text From SBOL on B/L and Ship Lists** = Y

Source	Text Type	Destination	Transfer Condition
SHIP	M	packing list	SHCF: **Print Text From SHIP on Packing List** = Y
Standard Product Detail	M	order acknowledgement	CNFG: **Print Text on Ext Documents** = Y
TEXT	M or F	any screen with Text No field	always
	F	customer statement	ARST/ARBS parameter
	F	invoice	IVPR/IVRR parameter
	F	credit memo	IVPR/IVRR parameter
TXWU	M or F	any screen with Text No field	always
	F	customer statement	ARST/ARBS parameter
	F	invoice	IVPR/IVRR/IVEX/IVRX parameter
	F	credit memo	IVPR/IVRR/IVEX/IVRX parameter
Vendor Configuration	M	displays on Vendor Configuration only	always
Vendor Master Detail	M	displays on Vendor Master Detail only	always
Vendor/Item Detail	M	displays on Vendor/Item Detail only	always

Extended Text

The **Extended Text** feature enables you to enter descriptive, context-specific text messages. You can access an **Extended Text** window from selected screens for this purpose. Each extended text message can contain more than one page.

Since extended text messages are meant for specific information, such as a particular purchase order, they cannot be reused. However, global extended text messages can be included in context-specific extended text messages.

The following shortcut keys have a special meaning when editing extended text messages:

Keys	Description
Ctrl+Enter	Save text
Esc	Exit window without saving text
Alt+F4	Insert global extended text message
F6	• Add a new page of text prior to current page, while viewing a page of extended text. • Add a new global extended text message, when the global extended text Browse window is open.
Ctrl+F6	Delete current page of text
Ctrl+Page Up	Move up to a previous page of text
Ctrl+Page Down	Move down to the next page of text; adds a new page if no page exists after the current page
Ctrl+Home	Move to the first page of text
Ctrl+End	Move to the last page of text

Usage

The locations where extended text messages may be attached are listed below.

Source—the screen or task where the extended text message is entered.

Destination—the screen or document where the message is transferred automatically.

Transfer Conditions—identifies the circumstances under which the message is transferred automatically to the **Destination**.

Source	Destination	Transfer Conditions
Contract Header Detail	header section of purchase order contract	POCF/Vendor Configuration: **Print Extended Text on Ext Documents** = Y
Contract Item Detail/ Pricing	line item section of purchase order contract	POCF/Vendor Configuration: **Print Extended Text on Ext Documents** = Y
Custom Product Detail (CUSM only)	order acknowledgement; invoice	ARCF: **Print Extd Text From CO** = Y (invoice only)
Customer application (SOPM)	displays on Customer application only	

Source	Destination	Transfer Conditions
Customer Order application (SOPM)		
– Header	order acknowledgement; invoice	ARCF: **Print Extd Text From CO** = Y (invoice only)
– Line Grid	Print CO Extd Text = Y (ARCF)— invoice only	order acknowledgement; invoice
Customer Financial Detail	displays on Customer Financial Detail only	
Customer Order Header Detail	order acknowledgement; invoice	ARCF: **Print Extd Text From CO** = Y (invoice only)
	packing list	SHCF: **Print Extd Text on Shipping/Packing Lists** = Y
Invoice Header Detail	displays on Invoice Header Detail and ARCR only	
LMST	displays only on LMST	
Purchase Order Header Detail	header section of purchase order	POCF/Vendor Configuration: **Print Extended Text on Ext Documents** = Y
Purchase Order Line Item Detail	line item section of purchase order	POCF/Vendor Configuration: **Print Extended Text on Ext Documents** = Y
SBOL	shipping invoice summary; shipping summary	SHCF: **Print Extd Text on Shipping/Packing Lists** = Y
	invoice	ARCF: **Print Extd Text From SBOL** = Y
	packing list	SHCF: **Print Extd Text on Shipping/Packing Lists** = Y
Standard Product Detail	order acknowledgement; invoice	ARCF: **Print Extd Text From CO** = Y

Global Extended Text

The **Global Extended Text** feature allows you to enter descriptive text that can be incorporated into context-specific extended text messages. Use the TEXT screen to review global extended text messages, which are identified by **Text Type** = *G*.

Press **Alt+F4** from the **Extended Text** window to insert global extended text into a context-specific extended text message. Unlike extended text messages, global extended text messages may not be longer than one page. Global extended text messages can be changed or deleted at any time without impacting any existing extended text messages.

Global Extended Text

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Press **Alt+F4** from the **Extended Text** window to insert global extended text into a context-specific extended text message. Unlike extended text messages, global extended text messages may not be longer than one page. Global extended text messages can be changed or deleted at any time without impacting any existing extended text messages.

Using the Shop Calendar

Use the *Shop Calendar* to record your company's policy on shop days and non-shop days. The Shop Calendar is a key element for accurate planning because it is used when determining MRP planning schedules. It is recommended that you set up the shop calendar for at least one year to accurately reflect your planning horizon. The possible date range is 01/01/1980-12/31/2079. It is recommended that you use a four-digit year, such as YYYY, when setting up the Windows **Short Date** format.

The shop calendar considers all weekdays to be shop days and weekend days to be non-shop days until you specify differently. After changing shop and non-shop days, the system adjusts all planned activities, such as MRP planned orders, accordingly. To toggle a date from a shop day to a non-shop day, double-click the date or press the *space bar*.

When the Shop Calendar is open, any task that places an exclusive lock on the manufacturing data group cannot be processed. For example, when the Shop Calendar is open, you cannot run the PLNG (MRP Planning) task.

A simulated planning calculation, based on shop days, is available by specifying a combination of start date, end date, or number of shop days.

Feature Access
The Shop Calendar can be accessed from the **Start** menu or from the toolbars within Fourth Shift Engineering MMAM and SFRM modules.

- Click **Start** then point to **Programs**—(*the folder that contains the Fourth Shift group*)—**Shop Calendar**

When accessed, the Shop Calendar is in inquiry mode and updates to the Shop Calendar are not allowed. If you are assigned the CLD1 function code, you will have read and update permission to Shop Calendar; otherwise this feature is in a read-only mode.

Feature Layout
Shop Calendar is divided into sections that include:

Section	Description
Monthly Calendar	Used to navigate through your shop calendar month-by-month. Today's date is circled for your reference.
Calculation Method	Used to select the method to calculate shop days, either by start date, end date or number of shop days.
Calculation Criteria	Used to enter criteria that is used during the simulated calculation, including start date, end date or number of shop days. • Click **Calculate** to begin the simulation.
Buttons	
OK	Use this button to close the Shop Calendar and save your changes.
Cancel	Use this button to close Shop Calendar without saving your changes.
Apply	Use this button to save your changes but without closing the Shop Calendar. After clicking **Apply**, the following message is displayed: *Updated successfully*. The **Apply** button will be: • *inactive,* if no changes are made to the calendar. • *active,* after a change is made to the calendar. • *inactive* again after clicking **Apply** and the data is saved.

Shop Calendar has the following menu options:

Menu	Option	Description
File	Exit	Closes the Shop Calendar.
Help	Help Topics	Opens the online Help.
	About Shop Calendar	Displays information about the release level and name of the application.

Shop Calendar Tips

Shop days are displayed in a highlighted or bold font. Non-shop days are displayed in a regular or non-bold font.

To update the Shop Calendar, you must be assigned the **CLD1** function code, and therefore have security to update the Shop Calendar. After updating the Shop Calendar, the calendar goes back into the inquiry mode—the **Apply** button is inactive.

Shop day calculation methods include:

- by a specific start date
- by a specific end date
- by a specific number of shop days

The Shop Calendar is a useful tool that can be used by external applications, such as Microsoft Excel or Word.

We recommend that you set up the shop calendar for at least one year to accurately reflect your planning horizon. Remember you can make changes to your shop calendar at any time, if necessary.

Calculate Shop Days

To calculate shop days, do the following:

1. Click **Start** then point to **Programs**—(*the folder that contains the Fourth Shift group*)—**Shop Calendar**.
2. Go to the month you want to work with to calculate shop days.
3. Select the calculation method.
4. Enter the calculation criteria.
5. Click **Calculate** to simulate shop days calculation.

Change Shop Days

To change shop days, do the following:

1. Click **Start** then point to **Programs**—(*the folder that contains the Fourth Shift group*)—**Shop Calendar**.
2. Go to the month needing shop day changes.
3. Go to the specific date to change.
4. Double-click the date or press the *space bar* to toggle a date from a shop day to a non-shop day.

   The date changes from a bold black font to grey.
5. Click **Apply** or **OK** to save your changes.

Using the Currency Information Window

If your Fourth Shift system includes the Multi-Currency Management (MCMM) module, many monetary values can be displayed in either local or foreign currency. Whenever you review or update monetary values using a foreign currency, the **currency information** window is displayed. This window is displayed over the system date in the upper right section of the Fourth Shift window.

The currency information window shows the following details:

- description of the currency currently used to display monetary values

- current exchange rate between the local and foreign currencies

- whether the customer, vendor or transaction is controlled by the local or foreign currency

Press **Alt+C** to toggle all monetary values on the screen between the local currency and the foreign currency. For more information on using multi-currency features, see "Suggestions for Using the Module" in the *Multi-Currency Management* manual.

Controlling Currency

The controlling currency that is displayed in the currency information window is related to the header section of the screen you are viewing. This does not change between header and scrolling lines sections.

- If the header section shows customer information, the currency information window displays the controlling currency of the customer.

- If the header section shows vendor information, the currency information window displays the controlling currency of the vendor.

- If the header section shows transaction information, or if the screen has no header section, the currency information window displays the controlling currency of the active transaction.

Euro Triangulation

For EMU (Economic and Monetary Union) transactions that require triangulation through the euro currency, both exchange rates of the triangulation calculation are displayed in the currency information window at the same time. When you press **Alt+C**, the toggled currency is highlighted to indicate which currency is being displayed on the screen. For more information on the Economic and Monetary Union, see "EMU Requirements" in the *Multi-Currency Management* manual.

Mass Maintenance Actions

Use the **Mass Maintenance Menu** window to select an action such as mass addition or deletion. Mass maintenance actions are screen-specific. Each **Mass Maintenance Menu** window displays only the actions available on the current screen.

To open the **Mass Maintenance Menu** window, do one of the following:

• Select **Mass Maintenance** from the **Tools** menu

• Press **Alt+M**

• Press **Alt+F4** with the cursor in the **Mass Maintenance** field, if available

A **Selection Criteria** window, used to *select* or *mark* mass maintenance groups, is displayed based on the mass maintenance action. For example, a **Selection Criteria** window is used to mark orders for inclusion on a consolidated picklist for a customer shipment based on user-defined criteria such as *Customer ID* or *Shipping Location*.

Asterisk symbols (*) indicate which lines on a list have been marked for a mass maintenance action. Use the asterisk key (*) to mark or unmark individual lines.

Default Data Entry Masks

Use the Mask Setup window as a tool to enter repetitive or similar data. The Mask Setup window allows you to match specific data entry requirements character by character. You can specify which characters are copied from the previous line, which characters are blank, and where the insertion point should start in each new line. The mask can be modified throughout the data entry session to meet changing needs.

Activate a Default Mask

When you first enter a screen, the default mask is not activated.

• To activate the default mask and open the **Mask Setup** window, do one of the following:

- Select **Default Setup** from the **Tools** menu

- Press **Alt+S**

A mask line, matching the entry line on the previous screen, is displayed with the letter *D* in each character position.

You can use the following symbols to design your entry line by designating which characters should be defaulted from the previous line. Each position in the mask line must be filled with one of the valid symbols.

Symbol	Description
D	Default the character from the previous line to this position.
B or (blank)	Clear this position.
C	Clear the position and place the insertion point in this position for new lines.
P	Default the character from the previous line and place the insertion point in this position for new lines.

Deactivate a Default Mask

Deactivate the default mask by pressing **Esc** to refresh the screen or by opening the **Mask Setup** window and entering the letter *B* or a blank in each position in the mask line.

Usage

The **Mask Setup** window is available for the following data:

Data	Module(s)	Screen
components	BILM PRCM	BILL
customer order lines	CUSM	COMT
inventory adjustments	INVM	INVA
inventory moves	INVM	IMTR
purchase order lines	PURM	POMT

Master Account Number Masks

The master account numbers used throughout the system must match the **Master Account Number Mask** set up on the GLCF (**G/L Configuration**) screen. If hyphens are included in the mask, the system accepts a numbers-only entry and formats the master account number using hyphens based on the mask.

Master account numbers are also validated so that the following conditions are met:

- The organization portion, if any, is defined on the GLOS (**G/L Organization Structure**) screen.

- The account portion is defined on the GLCA (**G/L Chart of Accounts**) screen.

- The account is active.

- The account is set up as a posted account.

- The master account number is open.

Menus and Button Bars

Most of the actions and features in Fourth Shift can be completed or accessed from menus and button bars.

Menus

The **menu bar** at the top of the Fourth Shift window contains lists of commands or actions that you can complete. Each of the five menus — **File**, **Edit**, **Tools**, **Options**, and **Help** — can be opened using either the keyboard or mouse. Click the menu title to view the options in each menu. Click on a menu option to start the action listed.

You can choose any menu option with the keyboard by pressing **Alt+** the letter underlined in the menu name to open the menu. Press the letter underlined in the option name to select the option.

You can open a *pop-up menu* by clicking the right mouse button anywhere. The pop-up menu contains some of the most commonly used standard menu options.

Menu options may not always be available. If an option is unavailable, the text is grayed and the option cannot be selected.

Button Bars

Fourth Shift contains three button bars that make it easy for you to access useful program features.

- The **toolbar** provides a quick way to access some of the most frequently used commands and features. It is displayed horizontally beneath the module name and menu bar.

- The **scroll bar** provides a quick way to move around on large and complex screens. It is displayed vertically along the right side of the window.

- **Transport buttons** allow you to navigate quickly to related or detail screens. It is displayed near the bottom of the explorer menu pane.

You have the option of hiding or displaying each of these button bars. Select your preferences from the **Options** menu.

File Menu

Menu Option	Description
Save Data	Saves data on the screen to the database
Print Preview	Generates a screen report and displays it using the Fourth Shift Report Viewer
Print	Prints a screen report using the selected printer and printing options
Exit	Closes Fourth Shift
Export	

Edit Menu

Menu Option	Description
Undo Field	Returns the field data to the previous entry in the field

Menu Option	Description
Refresh	Resets all fields and returns the screen to its initial state
Cut	Removes highlighted text and copies it to the clipboard
Copy	Copies highlighted text to the clipboard
Paste	Inserts the text from the clipboard at the insertion point
Delete	Removes highlighted text
Clear Field	Clears the value from the active field
Add Data	Adds a new line or section for data entry on screens where detail can be added
Delete Data	Deletes the line or data entry section containing the active field

Tools Menu

Menu Option	Description
Browse/Detail	Opens a window displaying a list of available values or additional detail about the information currently displayed
Currency Display	Toggles the values displayed on the screen between local currency and foreign currency
Default Setup	Opens a setup window which allows you to define a set of values to reduce data entry effort
Extended Text	Opens a window which allows entry of multi-page text messages
Mass Maintenance	Allows you to update multiple records at once
Add Data	Adds a new line or section for data entry on screens where detail can be added
Delete Data	Deletes the line or data entry section containing the active field
Shop Calendar	Opens the Shop Calendar
Report Viewer	Opens the Fourth Shift Report Viewer to view a saved report file

Options Menu

Menu Option	Description
Display Toolbar	If selected, displays the toolbar
Hide Toolbar	If selected, hides the toolbar
Auto Hide Toolbar	If selected, displays the toolbar only when you move the mouse pointer to the top of the window
Display Explorer Menu Pane	If selected, displays the menu pane with transport buttons at the bottom of the pane
Shortcut Keys on Hyperlinks	If selected, displays shortcut keys on transport hyperlinks

Menu Option	Description
Auto Tab Between Fields	If selected, automatically moves to the next field whenever a field is filled with data
Title Case for Labels	If selected, displays screen field labels in Title Case; if not selected, displays screen field labels in UPPER CASE; all data entries remain in uppercase
Primary Font	Allows you to select a standard font to display most screens and data
Fixed Width Font	Allows you to select a fixed width font to display certain features which require fixed width fonts
Customize Toolbar	Allows you to change and add options on the toolbar

Help Menu

Menu Option	Description
Screen Help	Displays context-sensitive online help for the screen
Field Action	Displays the message about the active field or performs and displays calculations related to the active field
Keyboard Shortcuts	Displays shortcut keys available for quick access to Fourth Shift commands and features
Using Fourth Shift	Displays information on using Fourth Shift
Net UI Help	Displays information on using a "thin client" installation
About Fourth Shift	Displays the release level and name of the application

Pop-up Menu (from right mouse button)

Menu Option	Description
Undo Field	Returns the field data to the previous entry in the field
Cut	Removes highlighted text and copies it to the clipboard
Copy	Copies highlighted text to the clipboard
Paste	Inserts the text from the clipboard at the insertion point
Delete	Removes highlighted text
Clear field	Clears the value from the active field
Add data	Adds a new line or section for data entry on screens where detail can be added
Delete data	Deletes the line or data entry section containing the insertion point
Browse/Detail	Opens a window displaying a list of available values or additional detail about the information currently displayed
	The following menu options are also available: Restore Default Grid Layout, Restore All Defaults, Screen Help, Field Property

Toolbar

The **toolbar** appears below the menu bar at the top of the application window. The toolbar provides a quick way to access some of the most frequently used commands and features. Toolbar buttons and tooltips appear automatically when you move your mouse over the toolbar.

The toolbar is displayed by default. You can use the options on the **Options** menu to hide the toolbar completely, or set it to "auto hide" so that it is displayed only when your mouse is positioned over the upper portion of the window.

You may also customize the toolbar by adding or removing buttons and button separators. For more information, see Customizing the Toolbar.

The default toolbar buttons include:

Button	Description
FS Explorer	Displays the Fourth Shift Explorer
Back	Return to the previous screen
Explorer menu pane	Display/hide explorer menu pane
Export	Exports data
Go To	Navigates to any screen or task by function code
Save Data	Saves data on the screen to the database
Print	Prints a screen report on the default printer set up for your workstation
Print Preview	Generates a screen report and displays it using the Fourth Shift Report Viewer
Cut	Removes highlighted text and copies it to the clipboard
Copy	Copies highlighted text to the clipboard
Paste	Inserts the text from the clipboard at the insertion point
Shop Calendar	Opens the Shop Calendar
Screen Help	Displays context-sensitive online help for the screen

Scroll Bar

The **scroll bar** appears vertically along the right side of the application window. It provides a quick way to move around on large and complex screens such as **Scrolling Lines** screens. Scroll bar buttons and tooltips appear automatically when you move your mouse over the scroll bar.

The scroll bar is displayed by default. Use the option on the **Options** menu to hide the scroll bar.

Use the scroll bar buttons to:

• move quickly between the header and line item sections of a screen

• move quickly through lines or pages of lines within a list or a line item section

• save data

The scroll bar buttons include:

Button	Description
Header Section	Moves to the Header section of a **Scrolling Lines** screen
To Top	Moves to the first item in a list, or to the first line in a **Scrolling Lines** screen
Page Up	Displays the previous set of lines in a list or **Scrolling Lines** screen
Up One Line	Moves to the previous item in a list, or to the previous line in a **Scrolling Lines** screen
Down One Line	Moves to the next item in a list, or to the next line in a **Scrolling Lines** screen
Page Down	Displays the next set of lines in a list or **Scrolling Lines** screen
To Bottom	Moves to the last item in a list, or to the last line in a **Scrolling Lines** screen
Line Item Section	Moves to the Line Item section of a **Scrolling Lines** screen
Enter	Saves data on the screen to the database

Transport Hyperlinks

Transport hyperlinks appear below the menu portion of the menu pane. They enable you to navigate quickly to related or detail screens. You have the option of displaying shortcut keys on transport buttons.

Each screen has its own set of transport Buttons. The screens that appear on the transport buttons are also listed as selections from the **Function** field.

Changing the Look and Feel

Fourth Shift provides a number of opportunities for you to personalize the way the program looks and operates. For example, you can:

- use the options in the **Options** menu to hide and display button bars or to change the program's appearance.

- customize the toolbar by adding or removing buttons.

- create links to Fourth Shift screens or to any program on your workstation using the Fourth Shift Explorer. See Exploring By Link for more information.

There are several other features that allow you to change the look and feel of the program.

Using the Fourth Shift Color Scheme

If you want, you can choose to use the coordinated **Fourth Shift Tan** desktop color scheme installed with Fourth Shift. The scheme alters the color of many elements of your desktop, including window titles, backgrounds and borders, to coordinate more closely with the Fourth Shift program. If you use this scheme, it will affect every program that runs on your computer.

The Fourth Shift program responds to most Appearance settings defined in the Display Control Panel.

Removing Graphical Borders

Graphical borders are the shadow or 3D effect used around open entry fields. Removing the graphical border will reduce the size of the window, allowing you to use a larger font.

For example, if you wish to a font size such as 10 point, the overall size of the window may exceed the available viewing area in 800x600 resolution. Removing the graphical border may allow you to retain the other two settings.

Selecting Fonts

Fourth Shift uses two different fonts to display screens and other information: a **primary font** and a **fixed-width font**. Most screens are displayed using the primary font selected for your workstation. Some windows, however, such as the help windows and browse windows, must use a fixed width font to display information.

You can select any font installed on your workstation to be your primary and fixed width fonts. The font you select affects only the displayed font, not printed reports. The recommended fonts are:

Type	Font	Size
Primary font	MS Sans Serif	8
Fixed width font	Terminal	9

If you change the size of your primary or fixed-width font, the Fourth Shift window will automatically resize to accommodate the change. Depending on the capabilities of your monitor, you may not be able to view an entire screen if your font size selection is too large.

For information on changing fonts on printed reports, see Adjusting Report Fonts and Margins.

Customizing the Toolbar

You can customize the toolbar by adding, deleting or rearranging buttons. For example, you can create buttons to access a menu option, run a program or execute a sequence of keystrokes. You may find it especially useful to create **Transport** toolbar buttons that automatically go to the screens you use most frequently. Additionally, you can change the icon or tooltip of any toolbar button, or organize buttons onto multiple toolbars and rearrange them on your screen.

There are four different types of toolbar buttons available.

Predefined

A **Predefined** button type is used for toolbar buttons that invoke a standard Fourth Shift menu option.

To create a Predefined button, select the **Predefined** option and choose an action from the list provided.

Two special kinds of Predefined buttons are **separators** and **new toolbars**. Each is used to organize toolbars and group related buttons.

- Use a separator to insert a vertical line between two buttons.

- Use a new toolbar to create a new "band" of buttons that can be repositioned within the application window. You may move toolbars horizontally or vertically within the region beneath the application bar.

- If you enter a **Title** for a new toolbar, it will appear to the left of the first toolbar button.

Transport

A *Transport* button type is used for toolbar buttons that go to a Fourth Shift screen or task.

To create a Transport button, select the **Transport** option and enter a **Function** Code. If the Function Code is not valid, an error message is displayed when you try to use the button.

Run Program

A *Run Program* button type is used for toolbar buttons that run or execute a program. It acts like a shortcut to another Windows application or document.

To create a Run Program button, select the **Run Program** option and enter a **Command** line. The command must run an executable (*.EXE) program. Parameters may be included in the command line.

Keystrokes

A **Keystrokes** button type is used for toolbar buttons that execute a predefined sequence of keystrokes.

To create a Keystrokes button, select the **Keystrokes** option and enter an **Input** value.

- The input value you enter is automatically processed when you click the button. Be sure to input the same keystrokes as you would on a keyboard, including tabs between fields.

- Special keys are not case-sensitive.

- If you are including data values in a sequence of keystrokes, use **{Ctab}** instead of **{Tab}** to move between fields. **{Ctab}** inserts the tab only if an *Auto Tab Between Fields* did not occur.

- The keystroke sequence can include literal keyboard characters such as a function code, or special keys such as the **Tab** key. Special keys are entered in braces. For example, to transport to the **BILL** screen and display the item **19-FRAME**, enter the following as the keystroke input: **{Home}{Home}BILL{ESC}19-FRAME{CR}**. See the following list of special keys.

The special key values available for use with the **Keystrokes** button include the following:

Keys	Key Value
Alt+Backspace	{@BS}
Alt+Enter	{@CR}
Alt+Function key	{@F1}, {@F2}, {@F3}, etc.
Alt+Tab	{@Tab}
Backspace	{BS}
Backtab	{Btab} or {*Tab}
Ctrl+Break	{^Break}
Ctrl+Delete	{^Del}
Ctrl+Down arrow	{^Dn}
Ctrl+End	{^End}
Ctrl+Enter	{^CR}
Ctrl+Function key	{^F1}, {^F2}, {^F3}, etc.
Ctrl+Home	{^Home}
Ctrl+Insert	{^Ins}
Ctrl+Left arrow	{^Lt}
Ctrl+Page Down	{^PgDn}
Ctrl+Page Up	{^PgUp}
Ctrl+Print Screen	{^PrtSc}
Ctrl+Right arrow	{^Rt}
Ctrl+Up arrow	{^Up}
Cursor Left arrow	{Lt}
Cursor Right arrow	{Rt}
Delete	{Del}
END	{End}
Esc	{ESC} or {Escape}
Enter	{CR}
Function keys	{F1}, {F2}, {F3}, etc.
Home	{Home}
Insert	{Ins}
Page Down	{PgDn}
Page Up	{PgUp}
Shift+Function key	{*F1}, {*F2}, {*F3}, etc.
Space bar	{Sp} or {Space}

Keys	Key Value
Tab	{Tab}
Tab (but not if the previous character triggered an *Auto Tab Between Fields*)	{Ctab}

Web Address URL

A **Web Address URL** button type is used for toolbar buttons that execute a Web-based program, such as Fourth Shift Report Model, My Fourth Shift Workplace, etc.

To create a Web Address URL button, select the **Web Address URL** option and enter the program URL. For example, to create a button for My Fourth Shift Workplace, enter: *http:// <machine name>.<domain name>.com/fsportals*.

Changing Field Name Labels

Important: Changes to any Fourth Shift field name label affect every Fourth Shift user.

Screen labels (also known as field names) can be changed or even hidden using the **Screen Customizer** (SCRM) module. Typically, administrators use this feature to align standard Fourth Shift terms with industry-specific vocabulary.

If your field name labels have been modified with Screen Customizer, the labels on your screen may not match certain Fourth Shift features such as online help and printed reports. Generally, screen customizations are limited to the screens displayed in the Fourth Shift program only. They are intended to allow a business to tailor Fourth Shift terminology to meet specific needs.

For more information on changing field names, see the *Screen Customizer* manual.

Using Shortcut Keys

Entering and editing data

To...	Press...
Copy selected text to the Clipboard	Ctrl+C
Cut selected text to the Clipboard	Ctrl+X
Paste text from the Clipboard	Ctrl+V
Clear the value from the active field	F1
Undo the most recent typing	Ctrl+Z
Add a new line or section on screens where detail can be added. Add a Standard Text number. View Text Message content (use if the text number already exists and the screen does not automatically display the text message).	F6
Delete the line or section containing the active field	Ctrl+F6
Reset all fields and return the screen to its initial state	Esc
Save data to the database	Ctrl+S or Enter

Moving within a screen

To...	Press...
Go to the **Function** field	Home+Home
Go to the last open field on the screen	End+End
Go to the beginning of the active field	Home
Go to the end of the active field	End
Go to the first line in a list	Ctrl+Home
Go to the last line in a list	Ctrl+End
Go up one line in a list	Up arrow
Go down one line in a list	Down arrow

Moving between screens

To...	Press...
Go to the function code entered in the Function field	Esc
Go to a related screen or window	F8 F9 F10 Alt+F8 Alt+F9 Alt+F10
Go to the module menu for the module containing the active screen	F5
Go back to the previous screen	Back button

Special features

To...	Press...
Print a screen report	F7
Open a Browse window	Alt+F4
Close a Browse window after making a selection	Ctrl+Enter
Edit Contact Notes or Email Body on the screen	Ctrl+T (only available on CCOT/VCOT/ICOT details screens, and ETPT)
End a search in the Browse window	Space bar
Toggle currency values between local currency and foreign currency	Alt+C
Open an Extended Text window, Contact Notes, or Email Body	Alt+T
Open a Mass Maintenance window	Alt+M
Open a Default Setup window	Alt+S
Move a graphic symbol to the left	Ctrl+Left arrow
Move a graphic symbol to the right	Ctrl+Right arrow
Open a drop-down menu	Ctrl+Down arrow

Note: Commands for extended text functions are described in Extended Text.

Fourth Shift R7.50 Help Basics

This document describes the organization and features of the help system for Fourth Shift R7.50.

Help Content Organization

All six sections of Fourth Shift Help are available from the **Help** menu in the Fourth Shift application and also from **Start> Programs > Fourth Shift** (*system name*) **> Help**. The sections are:

- Financial Help
- Manufacturing Help
- System Help
- Foundation Business Views Help
- FS Tables Help
- Data Export Information Paths Help

Help for a specific Fourth Shift screen can be accessed by pressing **F3**.

Help Window

The Fourth Shift Help window has two sections: the **Contents** pane (on the left) and the **Topic** pane (on the right). The **Contents** pane can be hidden with the **Hide** button.

- The *Topic* pane contains blue navigation buttons in the upper-right corner and lower-left corner to browse through help topics in a module.
- The *Help* window can be resized with the maximize/minimize button or by dragging the outside borders of the window.

Fourth Shift Financial Help

The purple books in the Financial Help represent the modules used by financial and accounting functions. To view the topics in a module, click the **+** symbol to open the book.
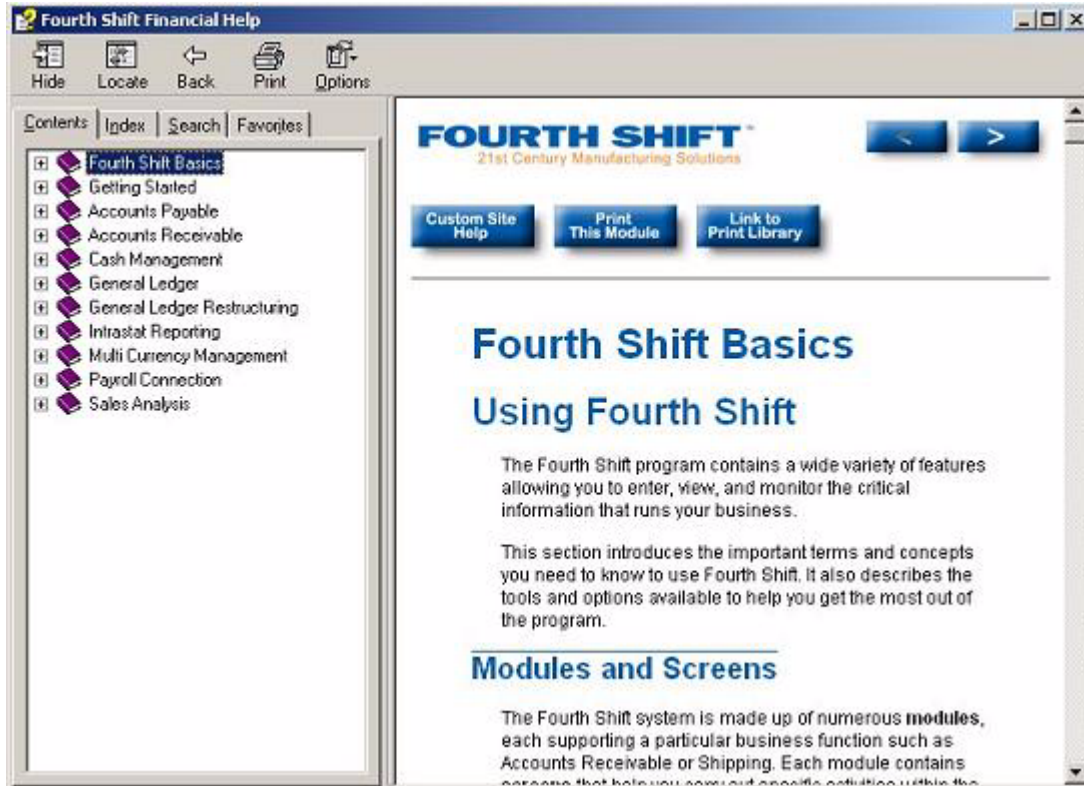
Fourth Shift Manufacturing Help Topics

The purple books in the *Manufacturing Help* represent the modules used by manufacturing functions. To view the topics in a module, click the **+** symbol to open the book.
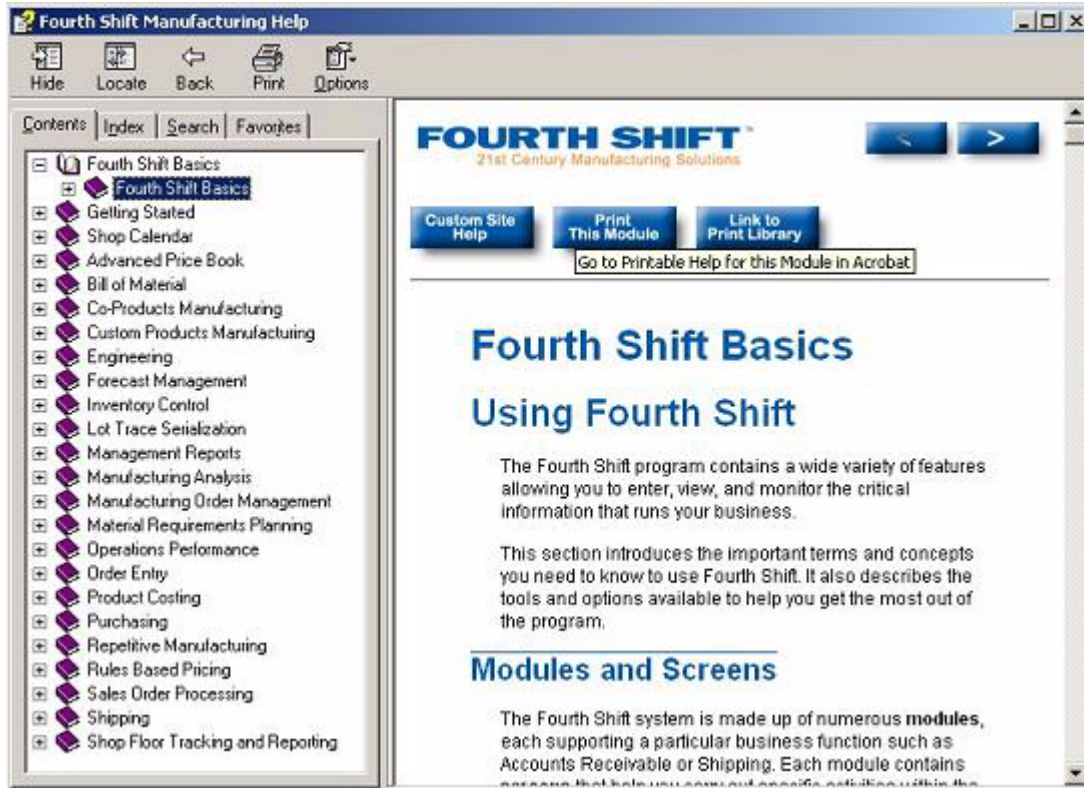
Fourth Shift System Help Topics

The purple books in the *System Help* represent the modules used by system administrator functions. To view the topics in a module, click the + symbol to open the book.
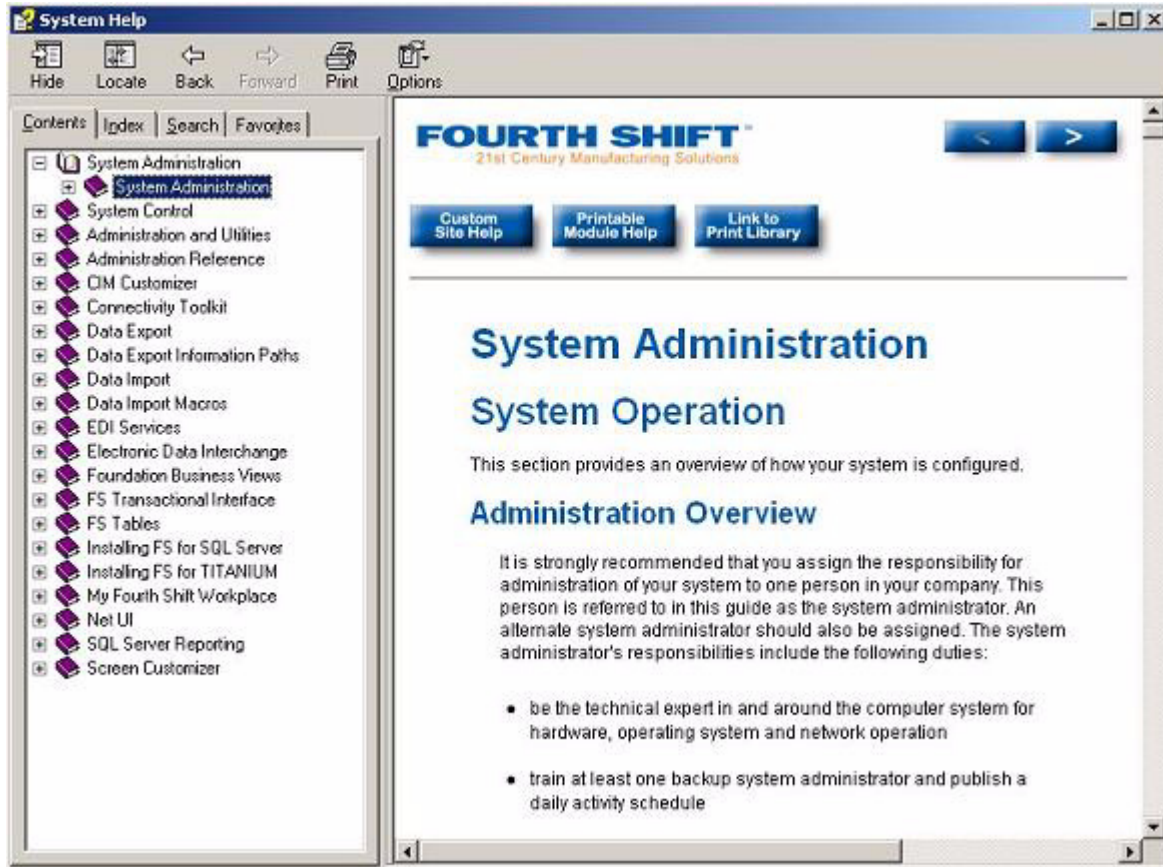
Search

When you are using the **Search** tab, note that you are searching only within the help section that is displayed in the blue title bar of the help window. The six help sections are:

- Financial modules
- Manufacturing modules
- System modules
- Foundation Business Views
- FS Tables
- Data Export Information Paths

On the Search tab, type the word or words you wish to find and either click the **List Topics** button or press **Enter**.

To select a topic from the search results, either select the topic and click the **Display** button or double-click on the results.

Click the **Locate** button in the *Help* window to redisplay the **Contents** tab and locate the topic you selected in the index.
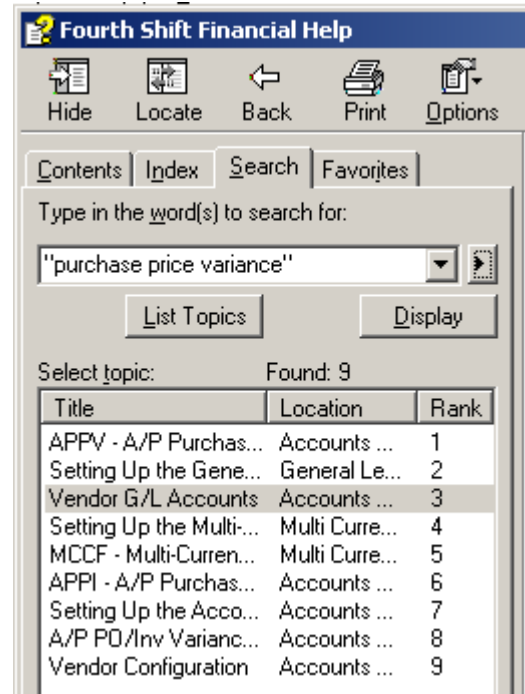
Search Tips

Follow these guidelines for more efficient searching in Fourth Shift Help:

- Use quotes to group words in the exact order, for example: "lot trace assignment."

- Use upper or lower case letters. Search strings are not case sensitive, for example, "LOT TRACE" produces same search results as "lot trace."

- Click ▸ at the right of the search field to add one or more of the following words to your search strings to refine your search:

    - AND (doesn't have to be uppercase), example: buyer AND messages

    - OR

    - NEAR

    - NOT

- Use the asterisk (*) as a wildcard for one or more characters.

- Use the question mark (?) as a wildcard for a single character.

- Use the additional options at the bottom of the Search tab to find similar words, words only in titles, or to search in the previous search results.

> **Note:** The **Match similar words** option uses Western-language rules for determining suffixes and finds all occurrences of a given word that include common suffixes. For example, a search for "run" will find words such as "run," "running," and "runner." The word "runtime" will not be found.

Search Results and Ranks

To view the text of the search results, you may resize the *Help* window in any of the following ways:

- Maximize the entire *Help* window

- Enlarge the **Search** tab by clicking and dragging right margin to resize the pane

- Resize the *Title*, *Location*, and *Rank* column headings on the Search tab

- Resort the search results by clicking on the *Title* or *Location* column headings (the system default sorts the results by *rank*)

The maximum number of search results displayed is 500.

Search results are ranked by the number of times the search term is found within a topic.

Search results are highlighted in the Topic pane when the Search Highlight feature is on in the Options menu of the Help window. You can scroll through the Topic pane to locate the highlighted results.

You may also turn off the Search Highlight feature on the Options menu of the Help window. This is useful if you are using the Find (Ctrl+F) function to find text on a page.

Favorites

To bookmark or save help topics that you use frequently, navigate to the help topic. Then click the **Favorites** tab. At the bottom of the tab, click the **Add** button to add the topic to your favorites list.

> **Note:** Favorites are stored separately for each of the six help sections.

Index

The Fourth Shift Help index contains topic headings. This makes the index function like an alphabetical table of contents.

To select a topic from the index, either select the topic and click the **Display** button or double-click on the heading.

Click the **Locate** button in the *Help* window to redisplay the **Contents** tab and locate the topic you selected in the index.

Custom Site Help

Custom Site Help is a feature designed to allow Fourth Shift customers to write and access their own company-specific help directly from the Fourth Shift application. Custom Site Help files are accessed from each Fourth Shift help screen by clicking the **Custom Site Help** button. These files can be created with any HTML editor or can be pages that link to a company intranet. See the section "Customizing Site Help" in the *System Administration* manual for more information about creating and publishing Custom Site Help.

Custom Site Help is available from all Fourth Shift screens and from all Fourth Shift interfaces, including My Fourth Shift Workplace. If the customer has not created a Site Help file for a screen, the **Custom Site Help** button displays the *About Site Help* page.

Print Library

Each topic has a **Link to Print Library** button. This links to the contents page for the list of help documentation available in PDF format that can be displayed with Adobe Reader (Version 7.0.5 or higher recommended).

All help topics available in the help are also available in printable PDF format. There are a few manuals that are available in PDF only.

Printing Help

There are several options for all Fourth Shift users for printing help topics:

- Click the **Printable Module Help** button to print the PDF version of a module's help from the Overview page (first page) of the help. This button is only available on the first page of a module's help. Print the entire manual or individual pages from Adobe Reader.

- Click the **Link to Print Library** button from any help topic to go to the list of PDF manuals available. Select the link for the manual to print and choose to print the entire manual or individual pages in Adobe Reader.

- Go to any help screen (either from the Help menu or press **F3** from a Fourth Shift screen), and choose the **Print** button from the Help window. Choose to print either the *selected topic* or the *selected heading and all subtopics*.

  Note: The selection for *Print the selected heading and all subtopics* prints the help for the entire module.
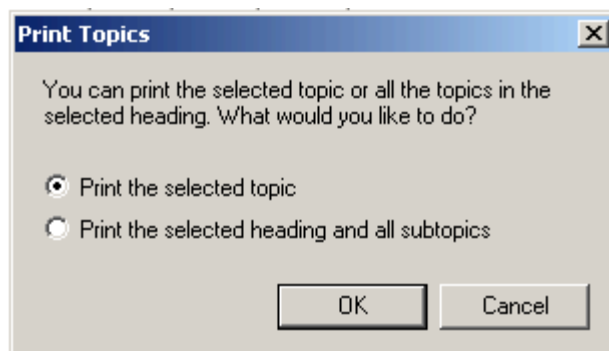
- Highlight text in the help window and right click on the text. Choose **Print** and in the *Page Range* section, click the **Selection** button.

- Highlight text in the help window and copy it and paste it into another document or e-mail.

Using Net UI

The Net UI feature, installed with the Net UI (NUIM) Module, provides alternate methods for using Fourth Shift, including across an Internet, intranet or remote dial-up connection. Net UI can also be used across a local area network (LAN) to improve performance by eliminating much of the network traffic.

This section describes the ways you can access Fourth Shift using Net UI, and some of the differences you will see when using Fourth Shift from a Net UI-enabled client. For detailed information on installing and administering Net UI, see the Net UI manual.

Net UI Configuration

The Net UI Module expands the traditional Fourth Shift client/server architecture to allow the server to act as a "host" to a client connection. The client connection is hosted by **Net UI Server** software installed with the traditional Fourth Shift server software. The main result is dramatically improved performance for clients, especially remote clients, because the client is used only to display the program. Complex processing occurs on the server-hosted client session.

Net UI clients and traditional Fourth Shift clients (using the main Fourth Shift program) can access a Fourth Shift server at the same time.

A Net UI configuration looks similar to:
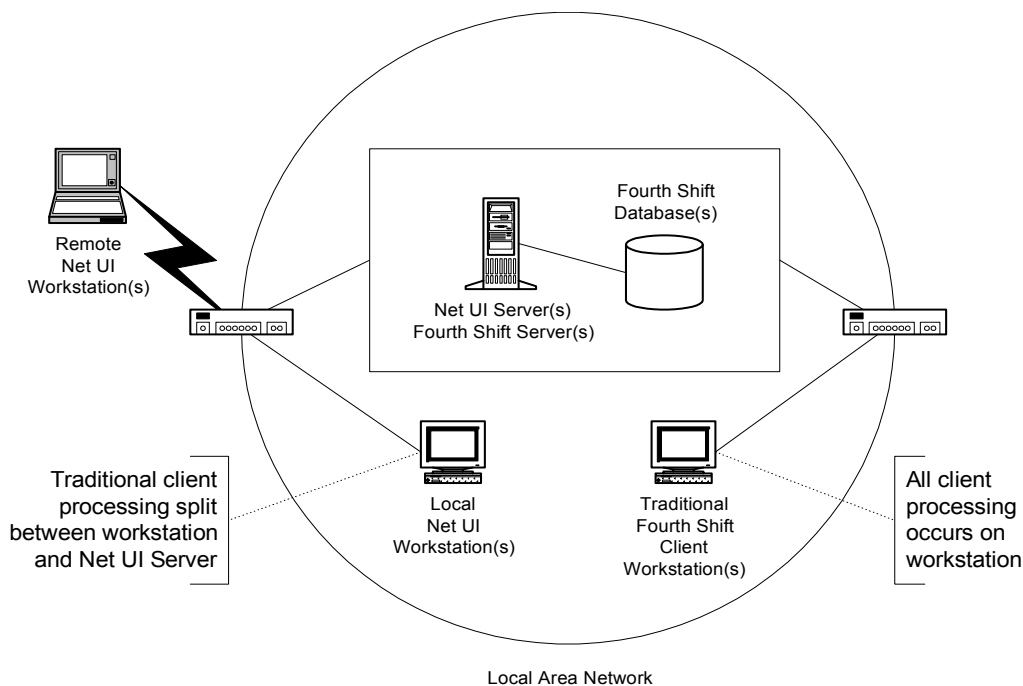
Local Area Network

Client Types

In general, there are two categories of Net UI users: local and remote.

- **Local users** are connected directly to the local area network (LAN). No special dial-up or other connections are required to access the network. Net UI clients are attached to the local area network using traditional methods. However, traditional client processing is split between the workstation and the Net UI Server.

- **Remote users** are not connected directly to the LAN and use some sort of communication technology to access information either through dial-up networking or the Internet.

    - If you use dial-up networking, you access the network through a modem and telephone line, using third-party dial-up communication software. Once attached to the network, you can sign onto Fourth Shift using Net UI.

    - If you use the Internet, you access the FSWEB Web page to sign onto Fourth Shift using Net UI. A button on the Web page starts the system using Net UI, and allows you to sign on.

Installing Net UI

The workstation installation process for Net UI differs depending on whether you are a local or remote user.

- Local users use the traditional workstation installation program.

- Remote users install Net UI using a customized installation package created by the FSWEB Web page.

For more information, see "Client Installation Options" in the *Net UI* manual.

Net UI User ID

When you sign on to Fourth Shift using Net UI, you must enter a **Net UI user identifier** in addition to your Fourth Shift User ID. This identifier is used to set up and identify a user-specific directory on the machine running the Net UI Server.

The Net UI User ID can be specified using one of the following methods:

- Manual entry when you sign on using Net UI. You will be prompted to enter your Net UI User Id before signing into Fourth Shift.

- **Command line** of the shortcut used to start Net UI. This eliminates the need to specify your Net UI User Id each time you start Net UI. See "Net UI Client Shortcut Parameters" in the *Net UI* manual for more information.

- Fourth Shift Explorer can automatically enter your Net UI if you record the value. From the **View** menu of the Fourth Shift Explorer, choose **Options**. Enter the Net UI information needed.

Accessing Net UI

All screens and tasks available through the main Fourth Shift program can be accessed using Net UI. Fourth Shift features and applications that are accessed from separate shortcuts, such as the Sales Order Processing (SOPM) and Engineering (ENGM) Modules, can not be accessed using Net UI. For more information, see "Restricted Features" in the *Net UI* manual.

The method used to start Net UI depends on whether you are a local or remote user.

Local User Access

- For local users, the workstation installation program installs shortcuts you can use immediately. Click **Start** then point to **Programs—**(the folder that contains the **Fourth Shift** group)—then click one of the following:

    - **Net UI—**to use Net UI

    - **Fourth Shift—**to use the traditional client version of the main Fourth Shift program

    - **Fourth Shift Explorer—**to use either Net UI or the main Fourth Shift program
      For more information on using Net UI with the Fourth Shift Explorer, see Net UI and Other Startup Options in this manual.

All three shortcuts can be present on the same client. This might be useful if you need to use functionality that is not available via Net UI. For example, you might use Net UI most of the time for performance reasons. However, if you need to use the functionality of the Engineering module the traditional client is required.

Remote User Access

For remote users, the customized installation package enables you to run Net UI from the FSWEB Web page. After all installation requirements are met and modifications made, complete the following steps to start Fourth Shift from a remote workstation.

Action	Completed
Verify that the Net UI workstation installation and modifications were completed.	
Using Microsoft Internet Explorer, enter the following location: http:\\ServerName**FSWeb** where ServerName is the name of the Web server.	
Press **Enter**.	
Click **Run Net UI**.	
Enter a **Net UI User Identifier** then click **OK**.	
Enter a **User ID** and **Password**. Press **Enter** to sign onto Fourth Shift.	

Printing Using Net UI

Fourth Shift generates several types of reports. When using Net UI, consider the following as you generate reports for the available types:

- **Screen Reports.** Screen reports can be generated by choosing either **Print** or **Print Preview** from the **File** menu.

  - Print Preview uses the Fourth Shift Report Viewer. Reports are sent to the Windows default printer for your workstation by default, although you can select a different printer.

- **Batch Process Reports.** When a batch process runs, reports are generated either to a file or the default printer for the server, not your client workstation. If you wish to use the report file generated, the file must be viewed or transferred to your workstation after the processing is complete.

Importing Using Net UI

The data import features in the System Control module can be used to input data from a file. You can run the data import features using Net UI, but several considerations may limit the situations where running data import is reasonable.

- Reference files such as macro files (*.MAC) must be available to your workstation.

- Data files used as input must be visible to your workstation.

- Data import validation uses the FS.CFG file to confirm file locations using drive letter and directory specifications.

These considerations mean that either a drive must be mapped from your workstation to the location of the files, or the files must be copied to your workstation and accessed from there. This applies to both local and remote users.

See "Using the Data Import Features" in the *System Control* manual for more information on the data import feature.

Using My Fourth Shift Workplace

A variety of features are available in My Fourth Shift Workplace that allow you to enter and view the critical information that runs your business. This section introduces the important terms and concepts you need to know to use My Fourth Shift Workplace. It also describes the tools and options available to help you get the most out of the system.

Overview

My Fourth Shift Workplace provides an alternative method for remote and local users to access and use the Fourth Shift system. My Fourth Shift Workplace takes advantage of using an Internet browser and therefore provides a flexible and powerful tool for users that can result in increased productivity.

What Makes up My Fourth Shift Workplace

My Fourth Shift Workplace is comprised of two base elements, portals and Fourth Shift WebUI. An additional, optional, element is the Connectivity Toolkit.

Portals

With My Fourth Shift Workplace, you can create configurable views of information called **portals**. A portal can include the Web-based version of the Fourth Shift program itself, as well as existing intranet resources, third-party browser-based applications, or even external Internet Web sites. Each user can define portals of their own, as well as access the group of public portals.

You can design portals to contain a variety of resources needed to perform a specific job. (For example, a portal for customer service representatives could include a set of commonly-used Fourth Shift screens, a Web-based customer relationship management system, and the DHL shipment tracking Web site.) Portals can also provide an overview to a specific segment of your business, such as a segmented view of continuously updated management reports.

See Using Fourth Shift Portals in this online manual for more information on creating and updating portal definitions.

Fourth Shift WebUI

Fourth Shift WebUI provides a Web-like look for the Fourth Shift program. This user interface style is similar to the traditional Fourth Shift program, enhanced to operate in the way users expect web-based software to operate.

Users can update and view data in real time, generate reports, run batch processes, and get online help just like traditional Fourth Shift users can. In addition, WebUI provides a number of advanced capabilities (such as Finders and links) that are unique to WebUI.

My Fourth Shift Workplace Concepts

My Fourth Shift Workplace is directly based on the traditional Fourth Shift system and functionality, but several new concepts are introduced to Fourth Shift users.

Portals

Portals are a collection of views that allow users to more efficiently do their jobs. This collection can include a variety of Fourth Shift data, or some Fourth Shift data along with other web content from your corporate intranet or outside companies.

Links

Links are fields or data values that jump to related screens or detail information when clicked. When you pass your mouse over a field that has a link assigned, you can click on any of the destinations listed to go there immediately.

Navigation

Navigation refers to methods by which you can move around the Fourth Shift WebUI system. Navigation methods include using the Fourth Shift Explorer, portal bar buttons, menus, links, tabs, Back icon, Next Step icon, function code shortcuts, and keyboard shortcuts.

Workflow

Workflow describes the flow of transaction processing within Fourth Shift WebUI. Workflow allows you to continue working without memorizing all the steps in a process. Several workflow methods are used, including:

- **One-Step method**. There is only one step within the transaction process. For example, a transaction is completed on one screen and you do not need to go to another screen to complete the process.

- **Multiple-Step method**. Several steps are involved in the transaction process sequence. For example, transactions are entered on one screen, applied on another and completed on yet another screen. You can use the **Next Step** icon to go through the sequence in the transaction process.

Getting Started

Understanding several key concepts about My Fourth Shift Workplace, such as access, navigation and data entry can help you to use the system more efficiently.

Accessing My Fourth Shift Workplace

To access My Fourth Shift Workplace, enter the URL address of the web site created for My Fourth Shift Workplace. For example, you could use FSWebServer.company.com/fsportals. Once you have used the URL address to access the Web site created for My Fourth Shift Workplace, you access the portals to select the view in which you want to work. You can display the list of available portals by selecting its name in the upper-left corner.

Navigating around Fourth Shift WebUI

Several methods are available for moving between functions and navigating around Fourth Shift WebUI.

Regardless of the list of the method used to navigate, you can only navigate to destinations that you are allowed to access as defined for your User Id on the FCMT (**Function Code Maintenance**) and PASS (**Password Maintenance**) screens.

Fourth Shift Explorer

Use the Fourth Shift Explorer frame, called Navigation, in Fourth Shift WebUI to go to a function in any application that you are allowed to access. The concepts of the Fourth Shift Explorer in WebUI are similar to the concepts of the Fourth Shift Explorer in the traditional Fourth Shift program, but some of the techniques are different. See "Using the Fourth Shift Explorer" in the Fourth Shift Basics manual in the Manufacturing or Financial help for more information on using the Fourth Shift Explorer in the traditional Fourth Shift program.

Fourth Shift Explorer has several operating modes, including:

- **Simple Mode**. Using simple mode, the Fourth Shift modules available are listed in alphabetical order in the navigation list. You can expand or collapse the list of functions available with each module—click on the option in the navigation list to select and go to the function.

- **Full Mode**. Using full mode, you can search for a specific function based on subjects or activities. For example, you can enter a search for "credit memo" and only those functions related to credit memo are listed in the navigation results. You can also enter the keyword or ID of a specific item or object and go directly to it—click on the option in the navigation list to select and go to the function or activity in another of the related frames.

You can also toggle back and forth between showing and hiding the function codes in the navigation list using the **Show Codes** and **Hide Codes** button.

Function Field

Each screen has a unique *Function Code*, which is a four-character shortcut that identifies the screen. For example, the **Item Master** screen is identified by the Function Code *ITMB*. Using the function code shortcut provides a quick way of accessing other screens.

The **Function** field is displayed to the far left directly under the row of tabs in the WebUI frame. It displays the Function Code of the screen you are viewing. You can go to a different screen by entering the corresponding Function Code then click **Go** or press **Esc** or **Enter**. If the Function field is not displayed, you can press **Back** or **Esc** until you return to the main screen with the **Function** field.

Tabs

Tabs are available when a screen has additional related or required information for a transaction. Tabs are always shown, even if you cannot access them based on the data on your screen. For example, from the MOAN (**Planner Action**) screen, you can see the **Material Shortages Detail** tab. But, if the item you are viewing doesn't have any material shortages, you cannot access the tab even though you can see it.

When on a tab, the label *Return* is used for the main screen name, if the tab is accessed from more than one screen.

Available tabs for each screen are listed on the **Features** tab when you select *Screen Help* from the **Help** menu.

Links

Many fields have been assigned links that allow you to jump to a related screen or detail information. Links provide easy access to related data. Fields can have several link destinations.

- Clicking on a field that has one link takes you right to the jump destination.

- Clicking on a field that has multiple link destinations takes you to the default destination.

- Moving your mouse over a field that has multiple link destinations displays a list of the destinations. In the list, the most likely destination is listed first in bold font (this is also the default destination).

For screens that have both entry and inquiry versions, you can be taken to the inquiry version if you do not have access to the entry version. For example, from the **Item** field you can click on a link to go to the ITMB (**Item Master**) screen. But, if you don't have access to that screen, and you do have access to the related ITMI (Item Master Inquiry) screen, you are taken to the inquiry destination instead.

Available links for each screen are listed on the **Features** tab when you select *Screen Help* from the **Help** menu.

Next Step Icon

Click the **Next Step** (arrow pointing right) icon, located to the right of the Function field, to go to the next set of screens in an application sequence. *Next Step* enables you to get to the next screen in a sequence without having to know the name of the screen. For example, from the ARCD (A/R Cash Deposits) screen, the **Next Step** icon takes you to the ARCR (A/R Cash/Credit Memo Application) screen, since it is the next screen in the cash application workflow.

- The *Next Step* sequence is based on the "Typical Work Flows" diagrams in the *Getting Started* manual.

- The *Next Step* sequence for each screen is listed on the **Features** tab when you select *Screen Help* from the **Help** menu.

Back Icon

Click the **Back** icon (arrow pointing left), located to the right of the Function field, to return to the previously viewed main panel.

- The **Back** icon enables you to return to what you were doing without having to remember exactly what screen you were on.

- The **Back** icon in My Fourth Shift Workplace works similar to the **Back** button in Internet Explorer, but it is specific to what you were doing in a specific Fourth Shift WebUI frame. Do not use the Internet Explorer Back button.

Entering and Viewing Data

My Fourth Shift Workplace is designed to allow you to enter and review business information quickly and easily. Most of the operations and techniques you can use are typical for Web-based programs. However, there are some special considerations to keep in mind while using My Fourth Shift Workplace.

Selecting an Option in a Field with a Selection List

Fields that permit only a limited set of entries contain a small arrow in the lower right corner. When the field gets focus, a drop-down icon will be displayed. You can either click this icon with the mouse or press Ctrl+Down Arrow keys to display the menu of options. Descriptions of the entry options are displayed at the bottom of the frame when you select *Field Action* in the **Help** menu.

Selecting a Row

To help you in determining if certain data rows can be selected, they are displayed slightly different than data rows that cannot be selected.

- **Blue Highlighted Background**
  The current line has a blue background color. You can move the selection with the mouse or the keyboard arrow keys.

- **Selecting a Line**

  - Clicking on a line in the detail grid of a main panel moves your cursor to that row.

  - Clicking on a line in a pop-up or browser window selects the row and returns the row to the parent screen.

- **No line marker**
  Some pop-up and browser windows do not contain the arrow markers but you can still select from these windows.

  - Select a row to return to the parent screen whenever the hand cursor is displayed.

Using the Date Picker

For date fields, click the calendar icon to open the date selector function (the Date Picker). Perform the following actions within the Date Picker:

- Press Ctrl+Home to return to the current date.

- Click the Today button to select the current date, which closes the Date Picker window and moves the cursor to the field with the selected date.

- Click outside the Date Picker window to exit the Date Picker.

    Note: Shop days/non-shop days are not differentiated on the Date Picker calendar.

Refreshing Data

You can return a screen to its initial state at any time by pressing **Esc**. This clears all fields on the screen and allows you to enter new key values. An alternate way to refresh your screen is by right-clicking while you are on the screen and selecting *Refresh* from the menu. You may be prompted to click **Retry** in order for the data to be resent to the screen.

If you have entered data on the screen but haven't saved it, those entries are lost when you refresh the screen.

Saving Data

You can complete a transaction and save data on the screen by clicking the **Submit** button, located near the bottom of the frame where a WebUI screen is displayed, or by pressing **Enter**.

Using Shortcut Keys for My Fourth Shift Workplace

Keyboard shortcuts in My Fourth Shift Workplace are slightly different than the keyboard functionality of the traditional Fourth Shift program. In My Fourth Shift Workplace, users are provided with complete keyboard support, following Microsoft Windows and Internet Explorer standards. Many features also can be accessed with the mouse.

My Fourth Shift Workplace keyboard support includes the following:

Entering and Editing Text

To...	Press...
Add a new line or section on screens where detail can be added	Ctrl+A
Copy selected text to the Clipboard	Ctrl+C
Delete the line or section containing the active field	Ctrl+D
Paste text from the Clipboard	Ctrl+V
Cut selected text to the Clipboard	Ctrl+X
Undo the most recent typing	Ctrl+Z
Save data to the database	Enter
Refresh the data	Esc

Moving Within a Screen

To...	Press...
Go to the **Function** field	Ctrl+G
Go to the **beginning** of the active field	Home
Go to the **end** of the active field	End
Go to the **first line** in a list	Ctrl+Home
Go to the **last line** in a list	Ctrl+End
Go **up one line** in a list	Up arrow
Go **down one line** in a list	Down arrow
Go **up one page** in a list	Page Up
Go **down one page** in a list	Page Down

Moving Between Tabs on a Page

To...	Press...
Move between tabs on a page	Ctrl+1 for Tab 1, Ctrl+2 for Tab 2, etc.

Moving Between Screens

To...	Press...
Go to the function code entered in the Function field	Esc or Enter
Go to a related screen or window	Tabs, links, Next Step icon
Go back to the previous screen	Back button

Using Menus

To...	Press...
View context-sensitive help topics	Ctrl+H for the Help menu
View report generation options	Ctrl+R for the Reports menu
View available tools options	Ctrl+T for the Tools menu

Using Special Features

To...	Press...
Open a Browse or detail list	Ctrl+B
Activate the Field Action	Ctrl+F
Close a Browse list after making a selection	Ctrl+Enter
Print a screen report	Reports menu—Generate option
Open an Extended Text window	Tools menu—Extended Text option
Open a Mass Maintenance window	Tools menu—Mass Maintenance option
Open the Cash Reversal Selection window from the ARCD (A/R Cash Deposits) or ARPD (A/R Prior Period Cash Deposits) screen	Tools menu—Cash Reversal option
Open a Default Setup window	Tab or Tools menu— Default Setup option
Select an option from a list	*
Go to next period on GLCF screen	Tab
Go to previous period on GLCF screen	Shift+Tab
Go to next fiscal year on GLCF screen	Ctrl+Right arrow
Go to previous fiscal year on GLCF screen	Ctrl+Left arrow
Open a drop-down menu	Ctrl+Down arrow
Go to the prior page of extended text	Tools menu—Previous Page
Go to the next page of extended text	Tools menu—Next Page
Add a new page of extended text prior to the currently displayed page	Ctrl+A
Add a new page of extended text while viewing the last page of existing extended text	Tool menu—Next Page

Using the Find Feature

The **Find** feature provides a quick and efficient way of searching for data to enter into an active field. This feature is sometimes called *the Finder*, since it enables you to search for specific data, such as customers, vendors, items, or orders. For example, if you need to enter a customer identifier, you can use the **Find Customer** link to choose the customer identifier from a master list. The master list can display more than just the identifier, it can also include the description and other information that you can use to choose the identifier without having to memorize it.

Master lists can be narrowed down, or filtered, to display only data that meet the criteria you enter. For example, if you want to see a list of customers in a certain city, then you could enter that city name as the field criteria and only those customers in that city would be displayed in the filtered list.

Accessing the Find Feature

The **Find** feature can be accessed using the following methods:

Accessed from a Field Within Fourth Shift WebUI
Accessing the **Find** feature from within Fourth Shift WebUI enables you to quickly enter data into a field without having to memorize it and then you can continue on with your processing.

From within Fourth Shift WebUI, you can access the Finder once the field gets focus. The small black triangle will be replaced with a trigger icon. This feature can be accessed from the keyboard or the mouse:

- Using the keyboard, press Ctrl+Down arrow to access the Finder directly when the **Find** icon is displayed, or to drop down the menu when there is a menu of choices and the down arrow icon.

- Using the mouse, click on the trigger icon and select from the menu if there are multiple choices.

Accessed as a Portal Frame
When setting up portals, you can create a portal with the **Find** feature by using the *FS Finder* frame type. The **Find** feature can be used independently or with other applications. For example, the **Find** feature can be the only frame in the portal, which enables you to search for Fourth Shift data. Or, the **Find** feature can be included in a portal that contains another frame that is running an application such as Fourth Shift WebUI.

The characteristics of the **Find** feature when accessed as a portal frame are based on the options determined when the *FS Finder* frame type was created, including:

- **Parent or Child**
  The Find feature can be set up as the parent frame of another application (for example, WebUI).

- **Logon Information**
  For security reasons, when accessing the Find feature through a portal frame, you are prompted to log on to Fourth Shift. You can enter this log on information (user id and password) when creating the frame type so that you are not prompted for it when the Find portal is accessed. See Assigning Security for more information on assigning security in the **Find** feature.

- **Navigation**
  When the Find feature is defined as a parent frame, an option is available to set the level of navigation.

- *Option Not Selected*—The **Find** feature (parent) sends a message to Fourth Shift WebUI (child) and if the desired screen is already displayed, the data is entered into the appropriate field. If the desired screen is not displayed, the data is not entered.

- *Option Selected*—The **Find** feature (parent) sends a message to Fourth Shift WebUI (child) and Fourth Shift WebUI changes to a screen and the data is entered into the appropriate field. Navigation is based on which **Find** feature is open:

Find feature	Navigate to
CO	For CUSM systems: COMT, COMI For SOPM systems: no navigation
Customer	For CUSM systems: CUID, CUII For SOPM systems: no navigation
GL Master Account	GLMA
Item	ITMB, ITMI
Lot	LMST
MO	MOMT, MOMI
PO	POMT, POMI
Vendor	VEID, VEDI

Understanding the Find Feature

When accessed from a data entry field in Fourth Shift WebUI, the **Find** feature opens immediately in a separate window. If starting data was entered in the originating field before accessing the **Find** feature, this data is shown as the criteria for the search. If starting data was not entered, the **Find** feature opens with no pre-set filter criteria. After entering the criteria, click the **Reload** data icon and the **Find** feature displays the data matching the criteria.

Filter Fields

The fields used for filtering are based on the type of data you are finding. For example, if you are finding a customer, you can filter on customer data, such as customer ID, name, contact, phone or zip code. If you are finding a customer order, you can filter on order number, status, customer id, name or order revision date. Filtering fields have several other features, including:

- **Drop-Down Lists**
  Filtering fields can be easily changed by using a drop-down list and simply selecting another field. For example, to filter the customer list by currency code, use the drop-down from any field selector and select the Currency Code field. You can then enter data in the criteria field to filter the list by a certain currency code. Field selectors without drop-down lists cannot be changed.

- **Field Labels**
  Field labels used in the **Find** feature do not correspond exactly to the field labels used in Fourth Shift WebUI. The **Find** Feature lists similar fields in the drop-down lists together by function to simplify locating similar information. For example, all the fields relating to Terms start with the word "Terms"; and the field label "phone", which may appear several times, is identified as "contact phone" and "customer phone" in the **Find** Feature.

- **Toolbar**
  A toolbar is located at the top of the window and allows you to:

  - See which Finder is running and select a different Finder when run as a portal frame.

  - Use the **Reload** data icon to apply the query and reload the data grid.

  - Use the **Save** settings icon to save your settings on the client as described in the Save Settings section.

  - Use the **Clear Criteria** icon to remove the filter criteria from all fields.

  - Use the **?** (question mark) icon to display the Help window to assist you with using the Finders.

Criteria Fields

Criteria fields are located directly below the filter fields and are available for entering field criteria. After entering filter criteria, click the **Reload** data icon to continue the process of finding the data, or click **Clear Criteria** to remove the filter criteria from all fields.

For example, if you want a list of all customer identifiers that start with the number "12", select the Customer ID field, and then enter 12 in the criteria field. Click the **Reload** data icon to process the request, and a list of all customer identifiers that start with 12 is displayed. See Specifying Criteria for more information on using the criteria fields.

Search Results List

When the **Find** feature displays the data that matches your criteria, the results are initially sorted in ascending order based on the first column. You can change the following results list options:

- **Setting the records per page**
  You can specify the number of records of returned data to display per page, based on your screen area settings. Enter a value in the **Records Per Page** field to change the display. The default number is 100.

- **Navigating through the list**
  You can use the set of controls to navigate through the list of data. You can go to the first page, previous page, next page or last page. You can also navigate using the vertical scroll bar located on the right side of the list or using keys on your keyboard, such as Page Up, Page Down, arrow up and arrow down.

- **Sorting the Results List**
  You can change the sort order by simply clicking on the header of another column. You can reverse the sort order from ascending to descending by clicking on a column header that is already sorted. The current sort field is identified by an angle bracket in the field header.

- **Changing Column Widths**
  Change the width of the columns in the data grid by moving the dividers in the grid header.

Data Selection

When the **Find** feature displays the list, it also displays the record range and number of records found. You can select data by clicking on the row's arrow marker. Data selection differs based on how the **Find** feature was accessed and if a level of navigation was specified.

- When accessed from a field within Fourth Shift WebUI, the data value is entered into the field from which the **Find** feature was accessed. After the data is selected, the **Find** window closes.

- When accessed from a portal frame, entry of the data is dependent on the frame configuration. For example, for a **Find** feature (parent) that is allowed to navigate Fourth Shift WebUI (child), Fourth Shift WebUI changes to the desired screen and then the data is entered into the appropriate field. When the parent frame is not allowed to navigate the child frame, the data is

entered into the appropriate field only if the desired screen is already displayed. After you select the data, the **Find** feature frame stays open and is available for more find activity.

Save Settings

After making changes to the **Find** feature settings, you may want to save the changes so that you don't have to enter them each time you open the **Find** feature on this workstation. Click **Save Settings** to save changes such as records per page, filtering fields, filter criteria and sort order. Settings are saved separately for each type of finder.

Reset Finder Fields to Defaults

If you have changed and saved the Finder fields, you can reset the Finder fields back to the default fields manually. The following is a list default finder fields for each of the Finders.

- **Customer Finder defaults**

    - CSR

    - Cust Zip

    - Customer Contact

    - Customer Phone

- **Customer Order Finder defaults**

    - Order Status

    - Customer Id

    - Customer Name

    - CO Rev Date

- **GL Master Account Finder defaults**

    - Organization Description

    - Account Type

    - Account Category

    - Account Open or Closed

- **Item Finder defaults**

    - UM

    - Make/Buy Code

    - Type

    - Order Policy

- **Lot Finder defaults**

    - Lot User Def 1

    - Lot User Def 2

    - Lot User Def 3

    - Lot User Def 4

- **Manufacturing Order Finder defaults**

    - Order Status

    - Gateway WC

    - MO Rev Date

- **Purchase Order Finder defaults**

    - Order Status

    - Vendor Id

    - Vendor Name

    - Rev Date

- **Vendor Finder defaults**

    - Vendor Contact

    - Vendor Phone

    - Vend City

    - Vend State

Assigning Security

The traditional screen level security used by the Fourth Shift system is used to build the field level security in the **Find** feature. This field level security means that no additional work is necessary to make sure that users can see only the data to which they are permitted.

- **Fourth Shift Screen Level Security**
  Screen level security can be assigned to the Fourth Shift screens using your User ID and the existing passwords, access codes and function codes specified on the PASS (**Password Maintenance**) and FCMT (**Function code Maintenance**) screens.

  Note: If you are using the Sales Order Processing Module (SOPM), the you must set up the following screens for the WebUI Find Feature to allow access to SOPM order entry data.

      - Name/Address Detail (SOP2)

      - Financial Detail (SOP3)

      - Order Information (SOP4)

- **Finder Field Level Security**
  Field level security is built by the **Find** feature based on the screen level security of the PASS and FCMT screens. Since the fields available for filtering may originate on several different screens, the **Find** feature verifies that you have security to at least one of those screens before allowing you to view or filter on those fields.

For example, if you have access to the **Customer Financial Detail** (CUS2) screen, the **Find** feature enables you to search and filter data available on that screen. If you do not have access to the **Customer Financial Detail** screen, the **Find** feature does not allow you to view or filter on fields from that screen.

Security by Field
Security for the **Find** feature is available by field. Security for several screens and fields is different based on if you use the CUSM or SOPM module.

Customer

Field	Security based on the panel
A/R Customer	CUS2/SOP3
Acct Cntct Fax	SOP2
Acct Cntct Name	CUS1/BR2C/SOP2
Acct Cntct Phone	CUS1/BR2C/SOP2
Acct No: A/R	CUS1/SOP2
Acct No: COGS	CUS1/SOP2
Acct No: Freight	CUS1/SOP2
Acct No: Sales	CUS1/SOP2
AR Current Amt	CUS2/BR2C/SOP3
AR On Hold Amt	CUS2/BR2C/SOP3
AR Past Due1 Amt	CUS2/BR2C/SOP3
AR Past Due2 Amt	CUS2/BR2C/SOP3
AR Past Due3 Amt	CUS2/BR2C/SOP3
AR Total Amt	CUS2/BR2C/SOP3
AR Unappl Cash	CUS2/BR2C/SOP3
AR Unappl Credit	CUS2/BR2C/SOP3
Bank Ref #1	CUS2/SOP3
Bank Ref #2	CUS2/SOP3
Bill To Addr1	CUS1/SOP2
Bill To Addr2	CUS1/SOP2
Bill To City	CUS1/SOP2
Bill To Country	CUS1/SOP2
Bill To Cust Id	SOP2
Bill To Name	CUS1/SOP2
Bill To State	CUS1/SOP2
Bill To Zip	CUS1/SOP2
Bin	SOP2
Booked Orders	CUS2/SOP3
Carrier Code	SOP2
Commission Code	CUS1/BR2C/SOP2
Consumed Crdt	SOP3
Crdt Limit Amt	CUS2/BR2C/SOP3
Crdt Limit Auth	CUS2/SOP3

Field	Security based on the panel
Crdt Limit Date	CUS2/SOP3
Crdt Pol: Assign	SOP3
Crdt Pol: Remove	SOP3
Credit Hold	SOP3
Credit Rep	SOP3
CSR	CUID/CUII/CUST/CUSI/BR2C/CUS1/CUS2/SOP2/ SOP3
Ctrl Currency	CUS2/SOP3
Currency Code	CUS2/SOP3
Cust Addr 1	CUS1/BR2C/SOP2
Cust Addr 2	CUS1/BR2C/SOP2
Cust City	CUS1/BR2C/SOP2
Cust Country	CUS1/BR2C/SOP2
Cust State	CUS1/BR2C/SOP2
Cust Zip	CUS1/BR2C/SOP2
Customer Class 1	CUS1/BR2C/SOP2
Customer Class 2	CUS1/BR2C/SOP2
Customer Class 3	CUS1/BR2C/SOP2
Customer Class 4	CUS1/BR2C/SOP2
Customer Class 5	CUS1/BR2C/SOP2
Customer Class 6	CUS1/BR2C/SOP2
Customer Class 7	CUS1/BR2C/SOP2
Customer Class 8	CUS1/BR2C/SOP2
Customer Contact	CUID/CUII/CUST/CUSI/BR2C/CUS1/CUS2/SOP2/ SOP3
Customer Fax #	CUS1/SOP2
Customer Id	none
Customer Level	SOP2
Customer Name	none
Customer Phone	CUID/CUII/CUST/CUSI/BR2C/CUS1/CUS2/SOP2/ SOP3
D & B Class	CUS2/BR2C/SOP3
D & B Date	CUS2/BR2C/SOP3
D & B Rating	CUS2/BR2C/SOP3
D & B Ref #	CUS2/BR2C/SOP3
Distrib Region	SOP2

Field	Security based on the panel
Distrib Zone	SOP2
End User Id	SOP2
FOB Point	CUS1/BR2C/SOP2
Freight Code	CUS1/BR2C/SOP2
Last Inv Date	CUS2/SOP3
Last Pay Date	CUS2/SOP3
Open or Bal Frwd	CUS2/SOP3
Partial Alloc	SOP3
Partial Shpmnts	CUS1/BR2C
Price Adj S/D %	CUS1/BR2C/SOP2
Prt:Item Source	CUS2/SOP3
Prt:Lang Code	SOP2
Prt:Nbr/Date Fmt	SOP2
Sales Region	SOP2
Srvc Chrg Flag	CUS2/SOP3
Srvc Chrg Rate	CUS2/SOP3
Statement Cycle	CUS2/SOP3
Statement Print	CUS2/SOP3
Stockroom	SOP2
Tax Cert:County	SOP3
Tax Cert:Fd/VAT	SOP3
Tax Cert:Muni	SOP3
Tax Cert:St	SOP3
Tax Code:County	SOP3
Tax Code:Fd	SOP3
Tax Code:Muni	SOP3
Tax Code:St	SOP3
Tax Ex:County	SOP3
Tax Ex:Fd/VAT	SOP3
Tax Ex:Muni	SOP3
Tax Ex:St	SOP3
Term D:Csh1 %	CUS2/SOP3
Term D:Csh1 Days	CUS2/SOP3
Term D:Csh2 %	CUS2/SOP3

Field	Security based on the panel
Term D:Csh2 Days	CUS2/SOP3
Term D:Csh3 %	SOP3
Term D:Csh3 Days	SOP3
Term D:Csh4 %	SOP3
Term D:Csh4 Days	SOP3
Term D:Net Days	CUS2/SOP3
Term M:Cutoff Dy	CUS2/SOP3
Term M:Due Day	CUS2/SOP3
Term M:Mth Delay	CUS2/SOP3
Terms Type	CUS2/SOP3
Text (addr) 1	CUS1
Text (addr) 2	CUS1
Text (addr) 3	CUS1
Text (addr) 4	CUS1
Text (addr) No	CUS1
Text (fin) 1	CUS2
Text (fin) 2	CUS2
Text (fin) 3	CUS2
Text (fin) 4	CUS2
Text (fin) No	CUS2
Top Level Cust	SOP2
Trade Class	SOP2
VAT Cust Code	CUS1/SOP2
YTD Payments	CUS2/BR2C/SOP3
YTD Sales	CUS2/BR2C/SOP3
YTD Shipments	CUS2/BR2C/SOP3
YTD Srvc Chrg	CUS2/BR2C/SOP3

Vendor

Field	Security based on the panel
1099 Flag	VEN1/BR2V
1099 Tax Id No	VEN1/BR2V
Acct Cntct Name	VEN1/BR2V
Acct Cntct Phone	VEN1/BR2V

Field	Security based on the panel
AP Current Amt	VEN1/BR2V
AP Fut Due1 Amt	VEN1
AP Fut Due2 Amt	VEN1
AP Fut Due3 Amt	VEN1
AP Fut Due4 Amt	VEN1
AP On Hold Amt	VEN1/BR2V
AP Past Due1 Amt	VEN1/BR2V
AP Past Due2 Amt	VEN1/BR2V
AP Past Due3 Amt	VEN1/BR2V
AP Unappl Cash	VEN1/BR2V
Bank Account	VEN1
Bank Name	VEN1
Bank Route	VEN1
Ctrl Currency	VEN1
Currency Code	VEN1
D & B Class	VEN1/BR2V
D & B Date	VEN1/BR2V
D & B Rating	VEN1/BR2V
D & B Ref #	VEN1/BR2V
Last Inv Date	VEN1
Last Pay Date	VEN1
Last Recd Date	VEN3
Order Value 1	VEN3
Order Value 2	VEN3
Payee Addr 1	VEN1/BR2V
Payee Addr 2	VEN1/BR2V
Payee City	VEN1/BR2V
Payee Country	VEN1/BR2V
Payee Name	VEN1/BR2V
Payee Name 2	VEN1/BR2V
Payee State	VEN1/BR2V
Payee Zip	VEN1/BR2V
Payment Form	VEN1
Payments 1	VEN1/VEN3/BR2V

Field	Security based on the panel
Payments 2	VEN3
Prt:Item Source	VEDI/VEID/VEND/VENI/VEN1/BR2V
Prt:Lang Code	VEN1
Prt:Nbr/Date Fmt	VEN1
Receipts Value 1	VEN1/VEN3/BR2V
Receipts Value 2	VEN3
Term D:Csh1 %	VEN1/BR2V
Term D:Csh1 Days	VEN1/BR2V
Term D:Csh2 %	VEN1/BR2V
Term D:Csh2 Days	VEN1/BR2V
Term D:Net Days	VEN1/BR2V
Term M:Cutoff Dy	VEN1/BR2V
Term M:Day Due	VEN1/BR2V
Term M:Mth Delay	VEN1/BR2V
Terms Type	VEN1/BR2V
Text (addr) Ln1	VEN1
Text (addr) Ln2	VEN1
Text (addr) Ln3	VEN1
Text (addr) Ln4	VEN1
Text (addr) No	VEN1
Text (conf) Ln1	VEN3
Text (conf) Ln2	VEN3
Text (conf) Ln3	VEN3
Text (conf) Ln4	VEN3
Text (conf) No	VEN3
Vend Addr 1	VEN1/BR2V
Vend Addr 2	VEN1/BR2V
Vend City	VEN1/BR2V
Vend Country	VEN1/BR2V
Vend State	VEN1/BR2V
Vend Zip	VEN1/BR2V
Vendor Approval	VEDI/VEID/VEND/VENI/VEN1/BR2V
Vendor Class 1	VEN1/BR2V
Vendor Class 2	VEN1/BR2V

Field	Security based on the panel
Vendor Class 3	VEN1/BR2V
Vendor Class 4	VEN1/BR2V
Vendor Class 5	VEN1/BR2V
Vendor Class 6	VEN1/BR2V
Vendor Class 7	VEN1/BR2V
Vendor Class 8	VEN1/BR2V
Vendor Contact	VEDI/VEID/VEND/VENI/VEN1/BR2V
Vendor Fax #	VEN1/BR2V
Vendor Id	none
Vendor Name	none
Vendor Phone	VEDI/VEID/VEND/VENI/VEN1/BR2V
YTD Invoiced	VEN1/BR2V

Item

Field	Security based on the panel
Acct No: COGS	ITMC/ITCI
Acct No: Inv	ITMC/ITCI
Acct No: Sales	ITMC/ITCI
ATP Flag	ITM2/ITM4
Avg Unit Price	ITMC/ITCI
Buyer	ITM2/ITM4/BR2I
Cost Family	ITMC/ITCI
Dec Prec Code	ITM2/ITM4
Demand Fence	ITM2/ITM4
Drawing	ITM1/ITM3/BR2I
ECCN	ITM1/ITM3
Family Grouping	ITM1/ITM3
Family Name	ITM1/ITM3/BR2I
Forecast Code	ITM2/ITM4
Forecast Prd	ITM2/ITM4
Gateway WC	ITM2/ITM4/BR2I
Group Tech Code	ITM1/ITM3/BR2I
HTS	ITM1/ITM3
Insp Required	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I

Field	Security based on the panel
Item	none
Item Class 1	ITM1/ITM3/BR2I
Item Class 2	ITM1/ITM3/BR2I
Item Class 3	ITM1/ITM3/BR2I
Item Class 4	ITM1/ITM3/BR2I
Item Class 5	ITM1/ITM3/BR2I
Item Class 6	ITM1/ITM3/BR2I
Item Class 7	ITM1/ITM3/BR2I
Item Class 8	ITM1/ITM3/BR2I
Item Description	none
Item Pcs/Pkg	ITM1/ITM3
Item Pkg Type	ITM1/ITM3
Item Ref 1	ITM1/ITM3/BR2I
Item Ref 2	ITM1/ITM3/BR2I
Item Ref 3	ITM1/ITM3/BR2I
Item Ref 4	ITM1/ITM3/BR2I
Item Ship Vol	ITM1/ITM3
Item Ship Wgt	ITM1/ITM3
Lead Time: Fixed	ITM2/ITM4/BR2I
Lead Time: Insp	ITM2/ITM4/BR2I
Lead Time: Run	ITM2/ITM4/BR2I
Lot Size Day	ITM2/ITM4
Lot Size Min	ITM2/ITM4
Lot Size Mult	ITM2/ITM4
Lot Size Qty	ITM2/ITM4
Lot: Assign Pol	ITM5/ITM6
Lot: Avail Days	ITM5/ITM6
Lot: Counter	ITM5/ITM6
Lot: Default	ITM5/ITM6
Lot: FIFO Inv	ITM5/ITM6
Lot: Last Lot No	ITM5/ITM6
Lot: Last Ser No	ITM5/ITM6
Lot: Mask	ITM5/ITM6
Lot: Material	ITM5/ITM6

Field	Security based on the panel
Lot: Retest Days	ITM5/ITM6
Lot: Ser No Dflt	ITM5/ITM6
Lot: Ser No Mask	ITM5/ITM6
Lot: Serializtn	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
Lot: Shelf Life	ITM5/ITM6
Lot: Trace Flag	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
Low Level Code	ITM2/ITM4
Make/Buy Code	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
NMFC Code	ITM1/ITM3
NMFC Sub-Class	ITM1/ITM3
Order Policy	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
Planner	ITM2/ITM4/BR2I
Planning Fence	ITM2/ITM4
Planning Policy	ITM2/ITM4/BR2I
Preferred Bin	ITM2/ITM4/BR2I
Preferred Stkrm	ITM2/ITM4/BR2I
Replan Code	ITM2/ITM4
Review Date	ITM2/ITM4
Revision Level	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
Safety Stock	ITM2/ITM4
Saleable Ind	ITM1/ITM3
Set Up Cost	ITMC/ITCI
Status	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
Type	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I
UM	ITMB/ITMI/ITM1/ITM3/ITM2/ITM4/ITM5/ITM6/BR2I/ ITMC/ITCI
UPC Code	ITM1/ITM3
Yield %	ITM2/ITM4

Customer Order

Field	Security based on the panel
Bill to Id	SOP4
CO Number	none
CO Rev Date	COMT/COS1/SOP4

Field	Security based on the panel
Commission Code	COS1/SOP4
CSR	COMT/COS1/SOP4
Ctrl Currency	COMT/COS1/SOP4
Currency Code	CUS2/COMT/COS1/SOP3/SOP4
Cust Address 1	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Cust Address 2	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Cust City	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Cust Country	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Cust State	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Cust Zip	CUS1/BR2C/COMT/COS1/SOP2/SOP4
Customer Id	COMT/COS1/SOP4
Customer Name	CUID/CUST/CUII/CUSI/COMT/COS1/SOP4
Customer PO No	COMT/COS1/SOP4
Default Shp Date	SOP4
Disc Amt-CTL	SOP4
Distrib Region	SOP4
Distrib Zone	SOP4
End User Id	SOP4
Exch Rate 1	COMT/COS1/SOP4
Exch Rate 2	COMT/COS1/SOP4
Exch Rate Op 1	COMT/COS1/SOP4
Exch Rate Op 2	COMT/COS1/SOP4
Expiration Date	SOP4
FOB Point	COMT/COS1/SOP4
Freight Amt-CTL	SOP4
Freight Chg Code	COMT/COS1/SOP4
Gross Amt-CTL	SOP4
Invoice or COD	COMT/COS1/SOP4
On Hold	SOP4
Ord Open Amt-CTL	COMT/COS1/SOP4
Order Priority	SOP4
Order Status	COMT/COS1/SOP4
Price Adj S/D %	COS1/SOP4
RBPM Required	SOP4

Field	Security based on the panel
Region Code	SOP4
Sales Category 1	COS1/SOP4
Sales Category 2	COS1/SOP4
Ship To Addr 1	COMT/COS1/CUS1/SOP2/SOP4
Ship To Addr 2	COMT/COS1/CUS1/SOP2/SOP4
Ship To City	COMT/COS1/CUS1/SOP2/SOP4
Ship To Country	COMT/COS1/CUS1/SOP2/SOP4
Ship Id/Dlvy Loc	COMT/COS1/CUS1/SOP2/SOP4
Ship To Id	SOP2/SOP4
Ship To Name	COMT/COS1/CUS1/SOP2/SOP4
Ship To State	COMT/COS1/CUS1/SOP2/SOP4
Ship To Zip	COMT/COS1/CUS1/SOP2/SOP4
Ship Via	COMT/COS1/SOP4
Shp:Mult Line	SOP4
Shp:Mult Order	SOP4
Shp:Partial Line	SOP4
Template Flag	SOP4
Term D:Csh1 %	COMT/COS1/SOP4
Term D:Csh1 Days	COMT/COS1/SOP4
Term D:Csh2 %	COMT/COS1/SOP4
Term D:Csh2 Days	COMT/COS1/SOP4
Term D:Csh3 %	SOP4
Term D:Csh3 Days	SOP4
Term D:Csh4 %	SOP4
Term D:Csh4 Days	SOP4
Term D:Net Days	COMT/COS1/SOP4
Term M:Cutoff Dy	COMT/COS1/SOP4
Term M:Day Due	COMT/COS1/SOP4
Term M:Mth Delay	COMT/COS1/SOP4
Terms Type	COMT/COS1/SOP4
Text line 1	COS1
Text line 2	COS1
Text line 3	COS1
Text line 4	COS1

Field	Security based on the panel
Text line No	COS1
Total Lns – CTL	COMT/COS1/SOP4
Total Lns-NonCTL	COMT/COS1/SOP4

Manufacturing Order

Field	Security based on the panel
Deliver To	MOMT
Gateway WC	MOMT
MO Number	none
MO Rev Date	MOMT
Order Status	MOMT
Planner	MOMT
Text Line 1	MOMT
Text Line 2	MOMT
Text Line 3	MOMT
Text Line 4	MOMT
Text No	MOMT

Purchase Order

Field	Security based on the panel
Blanket Order	POMT/POM1
Buyer	POMT/POM1
Ctrl Currency	POMT/POM1
Currency Code	POMT/POM1
Exch Rate 1	POMT/POM1
Exch Rate 2	POMT/POM1
Exch Rate Op 1	POMT/POM1
Exch Rate Op 2	POMT/POM1
FOB Point	POM1
Order Cont Phone	POM1
Order Contact	POM1
Order Status	POMT/POM1
Orig Order Date	POM1

Field	Security based on the panel
PO Number	none
PO Revision	POM1
Rev Date	POMT/POM1
Ship To Address1	POM1
Ship To Address2	POM1
Ship To City	POM1
Ship To Country	POM1
Ship To Name	POM1
Ship To State	POM1
Ship To Zip	POM1
Term D:Csh1 %	POM1
Term D:Csh1 Days	POM1
Term D:Csh2 %	POM1
Term D:Csh2 Days	POM1
Term D:Net Days	POM1
Term M:Cutoff Dy	POM1
Term M:Day Due	POM1
Term M:Mth Delay	POM1
Terms Type	POM1
Text Line 1	POM1
Text Line 2	POM1
Text Line 3	POM1
Text Line 4	POM1
Text No	POM1
Total Amt-CTL	POMT
Total Amt-NonCTL	POMT
Transport Via	POM1
Vendor Id	VEDI/VEID/VEND/VENI/POMT/POM1
Vendor Name	VEDI/VEID/VEND/VENI/POMT/POM1

GL Master Account

Field	Security based on the panel
Current Period Credits	GLMA/GLJE
Account Category	GLMA/GLJE
Account Description	None
Account Type	GLMA/GLJE
Active or Inactive	GLMA/GLJE
Balance Limit	GLMA/GLJE
Current Balance	GLMA/GLJE
Current Net Change Credits	GLMA/GLJE
Current Net Change Debits	GLMA/GLJE
Current Period Debits	GLMA/GLJE
Last Posted Date	GLMA/GLJE
Master Account	None
Master Account UserID	GLMA/GLJE
Open or Closed	GLMA/GLJE
Organization Description	GLMA/GLJE
Prior Net Change Credits	GLMA/GLJE
Prior Net Change Debits	GLMA/GLJE
Transaction Limit	GLMA/GLJE

Lot

Field	Security based on the panel
Item Number	None
Lot Description	LMST/LOTR
Lot Number	None
Lot Number Mask	LMST/LOTR
Lot Revision	LMST/LOTR
Lot User Def 1	LMST/LOTR
Lot User Def 10	LMST/LOTR
Lot User Def 11	LMST/LOTR
Lot User Def 12	LMST/LOTR
Lot User Def 2	LMST/LOTR
Lot User Def 3	LMST/LOTR

Field	Security based on the panel
Lot User Def 4	LMST/LOTR
Lot User Def 5	LMST/LOTR
Lot User Def 6	LMST/LOTR
Lot User Def 7	LMST/LOTR
Lot User Def 8	LMST/LOTR
Lot User Def 9	LMST/LOTR
Vendor Lot Number	LMST/LOTR

Specifying Criteria

The **Find** feature enables you to search for data based on search criteria that you enter. By entering field values, you can filter the master list to a specific set of data. Criteria can be entered using several methods:

Criteria Type	Description	Example
Starting Characters	You can enter the starting characters of data and the **Find** feature displays a list of all the data that begin with those characters.	If you enter "12" in the Cust ID field, the Find feature displays a list of all customers whose identifiers start with "12", such as 120001, 120002, and 120003.
Wildcards	You can enter a space before the criteria and the **Find** feature displays a list of the data that contains the specified criteria anywhere in the field value.	If you know part of a customer identifier, you can enter it with a space (by pressing on the space bar) before it, such as "<space> 05". The **Find** feature displays all customers with "05" anywhere in the identifier, such as 050004, 100005 and 100052.
Multiple Criteria	You can enter criteria in more than one criteria field and the **Find** feature displays a list of the data that matches all the criteria entered.	If you enter "12" in the Customer ID criteria field and "San Diego" in the City criteria field, the **Find** feature displays a list of all customers whose identifiers start with "12" and whose city is "San Diego".

Using Order Number Assignment

The **Order Number Assignment** feature provides an easy method of automatically generating sequential order numbers for customer, purchase and manufacturing orders. The Order Number Assignment feature can be accessed from either Fourth Shift WebUI or the traditional Fourth Shift system. Both user interface types will use the same order number assignment database and will work correctly for a mix of users. For more information about using the Order Number Assignment feature, see the Fourth Shift Basics online help.

Using the Charting Feature

The **Charting** feature provides a method for you to set up portals with frames that include tables and graphs. These frames are child frames that "listen" to the parent frame and display information accordingly.

Setting Up the Portal

When creating your portal, you need to select the **FSChart** frame type in order to use the Charting feature. See Add Charting Portal for more information on setting up a portal with the Charting feature.

Using the Charting Samples

Several graph and table samples are delivered with Fourth Shift WebUI. For example, the sample Inventory Location charts are child frames that listen to the ITMB and ITMC panels and the sample Customer Orders by Month, Customer Orders by Year and Orders by Month charts listen to the CUID and COCD panels.

For example, you can create a portal that includes a Fourth Shift WebUI frame that defaults to ITMB (Item Master) or ITMC (Item/Workcenter Cost Data) and a charting frame that displays an Inventory Location graph and table. When the Fourth Shift WebUI frame changes from one item to another, the graph and table changes accordingly, displaying the information for the current item.

Creating User-Defined Charts

The Charting feature allows you to create your own charts. Use the pre-defined charts, located in workplace database as examples to create your own graphs and tables. My Fourth Shift Workplace contains a Chart Builder portal in the Portal Admin Group that can be used to create and maintain chart definitions.

Using the Fourth Shift Explorer

The Fourth Shift Explorer provides a centralized point of access into the applications in the Fourth Shift system, and the activities you can perform with them. It also manages your Fourth Shift "workspace" and helps you navigate in the system.

The Fourth Shift Explorer helps you become familiar with Fourth Shift, and helps you work more effectively by providing a variety of ways to access the system. From the Fourth Shift Explorer, you can open Fourth Shift applications, complementary applications, or even popular desktop "office" applications.

Net UI and Other Startup Options

Several options must be specified on the Explorer Options dialog before using the Fourth Shift Explorer. For example, before you use the Fourth Shift Explorer with Net UI, you must supply Net UI connectivity details and your navigation preference since Net UI allows you to open multiple Fourth Shift windows on your desktop at one time. Other startup options include setting window controls and database connections.

Complete the following steps before using the Fourth Shift Explorer:

1. From the **View** menu of the Fourth Shift Explorer, choose **Options**.

2. If you use Net UI, complete the following steps:

   a   Select the **Run Net UI** check box.

   b. Enter your **Server** name, **Port** number, and **Net UI ID**.

   c. Select one of the following **Navigation preference** option for when you navigate from the Fourth Shift Explorer:

      -   **Use a New Window**

      -   **Reuse an existing window when possible**

4. Select the **Show function code in Explorer Applications list** checkbox, if you want to display the screen's *Function Code* beside the name of the screen.

5. Select one of the following **Explorer Window options**:

      -   **Normal**

      -   **Always on top**

      -   **Minimize on use**

6. Select the **Startup Options** for connecting to the database:

      -   Select the **Maintain Connection** check box for the database to stay open once the connection is established.

      -   Select a **No Connection Available** option for when no connection to the database could be made: either **Show all options** to display all the applications and activities or **Show remembered** to display only those applications and activities remembered from your previous logon.

7. Click **OK**.

   Note: You must restart the Fourth Shift Explorer for the specified options to take effect and in order to run Net UI using the Fourth Shift Explorer.

Overview

The Fourth Shift Explorer provides three basic approaches to accessing the Fourth Shift system.

- The **Applications** tab lists the available applications in the Fourth Shift system, by module. Use this list to access a specific application, screen or function code.

- The **Activities** tab lists the most common activities performed in the Fourth Shift system. Use this list when you have an activity or task to perform, but don't know which application, screen or function code to use.

- The **Workspace** tab lists the Fourth Shift applications that are currently running, with status information about each. Use this tab to create workspaces, create links to open applications and manage the windows listed.

Using the Applications Tab

The **Applications** tab enables you to access Fourth Shift using a list of available applications and function codes, sorted alphabetically by module. Double-click an entry in the Applications list to go to that location.

Fourth Shift is the most frequently used application in the system, and you can use the Fourth Shift Explorer to go to any specific screen or task. You can also use the Fourth Shift Explorer to go to applications in the Engineering (ENGM), Sales Order Processing (SOPM), Sales Analysis (SAAM) and other modules.

For many screens, you can use the Explorer to supply data values for one or two key fields. The data values you enter are filled in when the screen is opened, overriding any remembered fields that may ordinarily be filled in. For example, if you want to go to the Purchase Order (POMT) screen, you can enter a Purchase Order Number in the Fourth Shift Explorer.

Using the Activities Tab

Activities are sorted alphabetically by subject. Double-click an entry in the **Activities** tab to go to the location where the activity is performed. Additionally, the Fourth Shift Explorer displays step-by-step instructions and tips for performing the activity.

As with the Applications tab, you can supply data values for one or two key fields. For example, if you want to delete a line item from a purchase order, select "Delete Purchase Order Line Item" from the Activities tab and enter the Purchase Order Number. The Fourth Shift Explorer will open the Purchase Order (POMT) screen and display steps and tips for the activity.

Using the Workspace Tab

The **Workspace** tab displays your "current workspace," a list of currently active Fourth Shift applications. The current workspace also shows the status of each application. For Fourth Shift, this status includes the function code and data values for key fields.

You can use the Workspace tab to activate, minimize or close any window shown. You can also use the Workspace tab to create "links" that open applications, such as to a specific Fourth Shift screen or to any file or program. For more information, see Exploring By Link.

Exploring Fourth Shift

The purpose of the Fourth Shift Explorer is to help you learn your way around Fourth Shift by providing a variety of ways to access the system. Each of the five basic methods of exploring Fourth Shift offers a different approach. Whether you are a new, casual or experienced Fourth Shift user, the Fourth Shift Explorer can help you move around the system efficiently.

Exploring By Function Code

Traditional navigation within Fourth Shift involves typing a function code into the **Function** field. This method is also available in the Fourth Shift Explorer and is helpful for experienced users who are very familiar with the system. If you know exactly which screen or task you need to use, exploring by function code is an efficient way to get there.

Enter a function code in the **Function** field of the Fourth Shift Explorer using either the Applications or Activities tab.

- If you are using the **Applications** tab, the list will display the name of the screen related to the function code.

- If you are using the **Activities** tab, the list will display an activity performed on the screen related to the function code.

Click **Go To** to view the screen. If you want, you can enter data values for one or two key fields as well.

Exploring By Screen

The Applications tab lists all of the screens and tasks available to you, sorted by module. In this way, it works similarly to the master menu and module menus. Double-click a module name to view a list of the available screens within that module. Double-click a screen name to go to that screen. If you want, you can enter data values for one or two key fields as well.

This method is helpful for experienced users who understand the system and the way it is structured. If you work often with a large number of screens and know which screens belong to which modules, exploring by screen is an effective way to navigate in the system.

Optionally, you can display a screen's Function Code beside the name of the screen by selecting the **Show function code in Explorer Applications list** checkbox in the Explorer Options dialog box. You must restart the Fourth Shift Explorer for the option to take effect.

The Fourth Shift Explorer also provides access to applications in the Sales Order Processing (SOPM), Rules Based Pricing (RBPM), Sales Analysis (SAAM) and other modules. These applications are not accessible through the menus.

Exploring By Activity

The **Activities** tab lists hundreds of activities commonly performed with Fourth Shift at a variety of levels of sophistication. The Activities tab can help you add, change or delete data, run and print a report, analyze data or execute a batch process. The Activities tab is designed for users who are working in unfamiliar areas of the system.

To use the **Activities** tab, do the following:

1. Scroll through the list to find a subject related to the activity that you want to perform.

   Subjects are common business objects such as *customers*, *shipments*, or *invoices*.

2. Double-click a subject to see a list of activities. (

   In some cases, activities are grouped into subcategories within a subject.

3. Double-click an activity to go to the location where it is performed.

   If applicable, you can enter data values for one or two key fields as well.

This method is helpful for new or casual users, as well as experienced users in new roles or situations. If you are working in an unfamiliar area of the system, exploring by activity can direct you quickly to the screen you need to use and help you learn about the features and functionality of Fourth Shift.

Exploring By Subject

Subjects are common business objects such as customers, shipments or invoices. You can search for screens or activities that relate to a particular subject.

To search by subject, do the following:

1. Select a subject from the **Search For** box using either the **Applications** or **Activities** tab.

   The list is filtered to display only the applications or activities related to the selected subject.

2. Click **Go To** to locate the screen the application or activity you want to view.

   If you applicable, you can enter data values for one or two key fields as well.

Exploring By Link

Links work like bookmarks or shortcuts, allowing you quick access to an application. You can create a link to any application shown on the **Workspace** tab, or to any program or document appearing in the Windows Explorer. For example, you can create links to spreadsheets or word processing documents created by any application. A workspace can even contain a link to a page on your Intranet or on the World Wide Web.

You can open a link by double-clicking the link in the **Organize Links** dialog box, or by selecting it from the **Links** menu. When you open a link, the related document or program automatically opens and is added to the **Workspace** tab.

Workspaces

A group of links is called a **workspace.** You can create links and workspaces that are for your use only or are available to be shared by your colleagues.

- **My Workspaces**
  Links stored here are for your use only and are not available to others. But, you can use the Import and Export menu options to send and receive personal links to others.

- **Public Workspaces**
  Links stored here can be shared. You must sign on to the Fourth Shift Explorer as an administrator in order to add, change or delete links to public workspaces. For more information, see <u>Administrator Sign on</u>.

Links are displayed in both the Organize Links dialog box and in the Links menu. To view the dialog box, do one of the following:

- Select **Organize Links** from the **Links** menu

- Click **Organize Links** on the **Workspace** tab

Links to a Fourth Shift Screen

You can create a link to a Fourth Shift screen using the **Workspace** tab. If you want, you can even create a link to a screen showing specific key field data, such as a single purchase order or invoice. The **Description** that is shown on the **Workspace** tab identifies the additional information that is contained in a Fourth Shift link.

Modifying a Link

You can modify the properties of an existing link using the **Link Properties** dialog. To open the dialog, do the following:

1. Select then right-click the link you want to change

2. Choose **Properties**.

   The date and time of the last change to the properties is recorded in the **Last Modified** field for your reference.

Security and the Fourth Shift Explorer

When you open the Fourth Shift Explorer, a signon dialog box is displayed, allowing you to enter your **User ID** and **Password**. This information is validated to ensure that you are an authorized user, and a list of the screens and tasks you are permitted to access is compiled.

Once the Fourth Shift Explorer has validated your security information, you can navigate to Fourth Shift screens without signing on again. For more information, see "Securing the System" in the *Getting Started* manual.

Filtered Applications and Activities Lists

By default, the Fourth Shift Explorer displays only the applications installed on your workstation, and the activities that can be performed with them. In addition, it filters the function codes that are not related to your job, displaying only screens and tasks that match the access codes assigned to you by your system administrator.

For example, if your system administrator has allowed you to access only certain screens, these screens are the only ones displayed on the **Applications** tab. Likewise, only the activities performed on those screens are shown on the **Activities** tab, and only the subjects related to those screens are listed in the **Search For Subject** list.

Security Validation Process

The process used by the Fourth Shift Explorer to determine which applications or activities to display looks similar to the following:
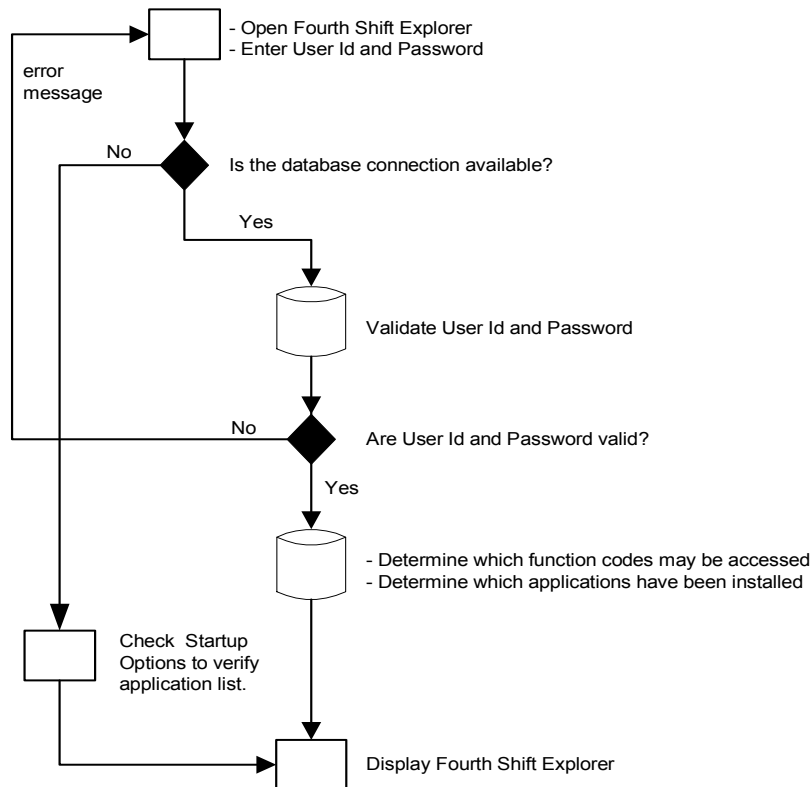
Administrator Sign on

The Fourth Shift Explorer has several modes of operation: administrator and standard. Using either mode, you can create links and workspaces for your own use. But, you must be in administrator mode to create public links and workspaces or to customize the applications list.

If you have authority to do so, use the following information to sign on to the Fourth Shift Explorer as an administrator:

1. Use Windows Explorer to go to the MFGSYS\SYSTEM directory.

2. Create a shortcut for the FSEXPLR.EXE file.

3. Right-click the shortcut and choose **Properties**.

4. Add **\admin** to the Target command line.

5. Click **OK**.

6. Rename the new FS Explorer shortcut to: *FS Explorer – Admin*.

Special Considerations

While the applications in the Fourth Shift system share a common look and feel, there are slight differences in operation between applications. Use the following guidelines for navigating to the applications in the Fourth Shift system.

Fourth Shift Application

The screens and tasks displayed in the Fourth Shift application interact seamlessly with the Fourth Shift Explorer. You can go to any screen or task in Fourth Shift from the Fourth Shift Explorer. You can also open the Fourth Shift Explorer by clicking the Explorer button on the Fourth Shift toolbar.

Frequently, you can supply one or two key field values to be filled in on the screen you are going to. If you do not enter key field values in the Fourth Shift Explorer, Fourth Shift uses its remembered fields feature to pre-fill key fields if applicable. See **Working with Key Fields** in the "Using Fourth Shift" chapter of the *Fourth Shift Basics* online manual for more information.

Fourth Shift Report Viewer

Each time you preview a saved report, Fourth Shift Report Viewer will be listed on the **Workspace** tab. If you have more than one saved report open on your computer at one time, each Report Viewer window will be listed separately.

You can create a link to the report, but only if it has been saved as a file first. If you try to create a link to a report that has not been saved, you will receive an error message.

The link you create is actually a link to the saved report file. Opening the link will open the saved report file in Fourth Shift Report Viewer, it will not regenerate the report.

Engineering Applications

If you use the **Engineering** (ENGM) or **Manufacturing Analysis** (MMAM) modules, the basic interaction between Fourth Shift and the Fourth Shift Explorer is unchanged. However, some Fourth Shift Explorer features are unavailable.

Security
If your Engineering module **User ID** and **Password** are different from your Fourth Shift User ID and Password, you must sign onto any Engineering application when you open it from the Fourth Shift Explorer.

Navigation
To return to the Fourth Shift Explorer from an Engineering application, press **Alt+Tab** or use your desktop Taskbar buttons.

Sales Order Processing and Rules Based Pricing Applications

You can use the Fourth Shift Explorer to open the applications in the **Sales Order Processing** (SOPM) or **Rules Based Pricing** (RBPM) modules. However, some Fourth Shift Explorer features are unavailable.

Navigation
You can use the Fourth Shift Explorer to open the **Sales Order Processing** module. However, you must press **ALT+Tab** or use your desktop Taskbar buttons to move between the two applications once both are open.

Sales Analysis Applications

You can use the Fourth Shift Explorer to open the features of the **Sales Analysis** (SAAM) module. However, some Fourth Shift Explorer features are unavailable.

Security
The Fourth Shift Explorer does not supply security information to the Sales Analysis database. You may need to sign onto it separately when you open it from the Fourth Shift Explorer.

Navigation
To return to the Fourth Shift Explorer from the Sales Analysis database or applications, press **Alt+Tab**.

Fourth Shift Explorer Menu Options

You can access a number of application features using either the menu bar located at the top of the window or from several pop-up menus within the Fourth Shift Explorer.

Menu Bar

Menu	Option	Description
Edit/ Copy		
File	Import	Imports a specified link.
	Connect	Establishes a connection to the database.
	Disconnect	Removes the connection to the database.
	Exit	Closes the Fourth Shift Explorer.
View	Options	Defines your system-wide and application-specific settings, including display and navigation preferences.
Links	Organize Links	Displays your links and workspaces.
	My Workspaces	Displays a list of personal links.
	Public Workspaces	Displays a list of publicly shared links.
Help	Help Topics	Opens the Fourth Shift Explorer section of the Fourth Shift Basics online manual.
	About Fourth Shift Explorer	Displays the version and name of the application.

Pop-Up Menu

Option	Description
Open	Opens the current links in the workspace.
New	Create a new workspace or link.
Cut	Removes the selected link and puts it on the Clipboard.
Copy	Copies selected workspace or link to the Clipboard.
Paste	Inserts a copy of the Clipboard contents at the insertion point.
Delete	Removes the selected workspace or link.
Rename	Allows you to rename the workspace or link.
Properties	Displays the current properties of the application or link.
Export	Exports a specified link.
Import	Imports a specified link.
Refresh	Redisplays the view including any changes.

Using Fourth Shift Portals

With My Fourth Shift Workplace, you can create configurable views of information called **portals**. A portal can include the web-based version of the Fourth Shift program itself, as well as existing intranet resources, third-party browser-based applications, or even external Internet Web sites.

Portals can include various types of information in a number of different arrangements. Each different area of information in the portal is called a **frame**.

What is Included in a Portal?

A **Portal** is a set of views to Fourth Shift data as well as data from other web sites. A Portal is set up as a collection of frames. The collection can represent a set of related data or a sequence of tasks that are completed.

This collection of information can include a variety of Fourth Shift data, or some Fourth Shift data along with other web content from your corporate intranet or external internet resources.

You can design portals to contain a variety of resources needed to perform a specific job. (For example, a portal for customer service representatives could include a set of commonly-used Fourth Shift screens, a customer relationship management system, and the DHL shipment tracking web site.) Portals can also provide an overview to a specific segment of your business, such as a segmented view of continuously updated management reports.

There are a number of concepts you should understand about portals before you begin completing administrative tasks. Review and understand the following terms.

Frames

A **Frame** is an individual area of information displayed through a portal. Frames are a concept used in Internet browsers as well, and several types of frames included with My Fourth Shift Workplace provide enhanced communication between frames. These unique Fourth Shift frame types can publish data and subscribe to data for use in other frames. See "Frame Types" for more information.

A portal can have a maximum of 20 frames defined by a maximum of 4 columns, each with a maximum of 5 rows.

Portal Types

Portal definitions are created in one of the following categories:

- **Public portals** can be accessed by all users. This is useful for a general purpose portal, beginning a portal for other users or templates for users to begin with when constructing their own portal.

- **Private portals** can be accessed only by the user that creates them. This allows users to create a number of specific portals that allow them to complete their jobs more productively. For example, users may create different portals for monthly tasks or for solving specific types of problems.

Both public and private portals are organized into **groups** which allows you to locate portal definitions more quickly. You should consider assigning logical names to public groups such as department names or functional area descriptions.

Portal Manager

The **Portal Manager** controls the frames included in the portal by managing the operation and communication between the frames. It also provides a way for you to define, manage and select portal definitions.

The Portal Manager is automatically included in each portal definition. The Portal Manager consists of two primary elements:

Portal Bar

The portal bar is the top frame in the portal. It contains the identification title of Fourth Shift and several important features including:

- **Current Portal and Portal List access.** On the left side of the Portal Manager frame is the portal list access button. The title on the button is the name of the portal you are currently viewing. When you click the title, the list is displayed. Clicking the title when the list is already displayed, hides the list.

- **Portal Security link.** Allows you to grant portal admin access to current portal users, revoke portal admin access and view portal user account information. Only a portal administrator will see this icon.

- **Preferences link.** Allows you to set up and create portal definitions and personal preferences.

- **Save Layout link.** Updates the frame sizes and locations of the current portal to match the current display. This portal will then display with this layout when accessed.

- **Log Off link.** Exits all Fourth Shift frames. This method of exiting Fourth Shift allows screen level validations to be completed when you exit the system. Closing the Internet Explorer browser **does not** communicate with the Fourth Shift frames so no validation is completed. **It is highly recommended that you always** use the **Log Off link** in the portal bar to exit My Fourth Shift Workplace.

- **Help button.** Opens the online help for the Portal Manager within My Fourth Shift Workplace. The active tab in the help describes portals. Use the other tabs to learn about using the Fourth Shift specific frames like WebUI and Explorer.

Portal List

The portal list includes all portal definitions that are available to you. Both public and private portals are available by clicking the button in the list that contains these items. Open the portal list by clicking the title of the current portal displayed on the left side of the portal manager.

The following options are available as buttons in the list.

- The **Portal Admin portal group is visible only** when you are logged in as the main portal administrator. It allows you access to all portals created by the main portal administrator for this portal group, as well as the default admin portals: Explorer Security and Remote Server Admin.

- The **Connectivity Toolkit portal group is visible only** when you are logged in as the main portal administrator and you have this module installed. It allows you access to the portals that are part of the Connectivity Toolkit module used to customize the WebUI interface.

- **All Public Portals** shows the public portal definitions that are available to all users, in a single list.

  A set of sample role-based public portals is installed with My Fourth Shift Workplace. These portals are provided to give you some ideas and a template to start building new portals, if desired.

- **Group Tree** shows the list of public and private portals, by group, in a tree view.

- The names of any private groups defined for the specific user also appear as buttons in the Portal List.

Frame Definitions

Each frame is defined by a set of information, which determines how the frame behaves and relates to other frames in the portal. Frame definitions are maintained using the Preferences option on the My Fourth Shift Workplace toolbar.

This frame definition consists of the following information.

- Frame Title
- Frame Type
- Predefined Location
- Parameters
- Parent Frame
- Fourth Shift User Information
- Default Frame Settings

Frame definitions are associated with both public and private portals. See "Portal Types" in the "Using Fourth Shift Portals" topic for more information.

Frame Title

Frame Title is the name displayed at the top of the frame. This title can include detailed descriptions of the content of the frame. When the frame is minimized, this title is still displayed to provide an easy way to identify the frame.

Frame Type

Frame type identifies the frame content and communication options available to other frames. The frame type determines the communication method available between frames and supplemental information that you can associate with a frame. This information might include information such as user identifiers and URL addresses. See "Frame-to-Frame Communication" for more information on communicating information between frames.

The frame types include the following:

Type	Description
FS Chart	Runs the Fourth Shift charting application.
FS Explorer	Displays the Fourth Shift Explorer application tree for navigation and assistance when using FS WebUI type frames.
FS Explorer Security	Updates security information for the Fourth Shift Explorer.
FS Finder	Runs the Fourth Shift Find application.
FS UIEditor	Runs the Fourth Shift UI Editor application.
FS WebUI	Runs a Fourth Shift session on the web server.
Terminal Server	Runs a a Windows (non-Web) application through Windows Terminal Server.

Type	Description
Arbitrary Site	Accesses a URL address for any web site that is not necessarily associated with Fourth Shift or one of the other frame types.
Named Site	Similar to an Arbitrary Site in that it can be used to access any web site. However, a Named Site allows the URL to be defined as a known location in the location list, and then simply referenced by name.
KPI Display	To display a Key Performance Indicator from the optional Business Intelligence module.

Each Fourth Shift WebUI type frame starts a Fourth Shift application session or connection to Fourth Shift information. For example, if you are viewing two frames of WebUI information, you have started two Fourth Shift sessions. Note that sessions are not the same as Fourth Shift user licenses. In the previous example, the two sessions share one user license.

> **Note:** If a portal accesses multiple databases, it may consume multiple Fourth Shift licenses (one from each FS system).

Predefined Locations

Predefined locations, or names, allow you to create a reference to a server and then use that location name in the portal definition. The location names then allow the server definition to change as needed without interfering with the individual portal definitions.

Because the predefined location names are used in the portal definition, choose names that clearly identify what the server accesses. For example, use a location name like Colorado Plant rather than a server name like CCSVR-21.

Predefined locations are created by selecting the Preferences option on the My Fourth Shift Workplace toolbar and then clicking **Locations.**

Parameters

Parameters are supplemental characters passed when the web site is first accessed. Each frame type accepts different initialization strings.

FS WebUI Frame Initialization

Fourth Shift WebUI frames accept an initialization string which allows the frame to execute a predefined sequence of keystrokes. The following apply to these initialization strings:

- Initialization strings for Fourth Shift WebUI type frames must start with a question mark (?) character.

- The initialization string you enter is automatically sent when the frame displays. Be sure to input the same keystrokes as you would on a keyboard, including tabs between fields.

- The initialization string can include literal keyboard characters such as a function code, or special keys such as the TAB key. Special keys are entered in braces. For example, to transport to the BILL screen and display the item **19-FRAME**, enter the following as the initialization string: **?BILL{ESC}19-FRAME{CR}.** See below for a list of special keys.

- Special keys are not case-sensitive.

- If you are including data values in an initialization string, it is recommended that you use **{Ctab}** instead of **{Tab}** for tabbing between fields.

The special key values available for use in initialization strings include the following:

Keys	Key Value
ALT+BACKSPACE	{@BS}
ALT+ENTER	{@CR}
ALT+Function key	{@F1}, {@F2}, {@F3}, etc
ALT+TAB	{@Tab}
BACKSPACE	{BS}
BACKTAB	{Btab} or {*Tab}
CTRL+BREAK	{Break}
CTRL+DELETE	{Del}
CTRL+DOWN	{Dn}
CTRL+END	{End}
CTRL+ENTER	{CR}
CTRL+Function key	{F1}, {F2}, {F3}, etc
CTRL+HOME	{Home}
CTRL+INSERT	{Ins}
CTRL+LEFT	{Lt}
CTRL+PAGE DOWN	{PgDn}
CTRL+PAGE UP	{PgUp}
CTRL+PRINTSCREEN	{PrtSc}
CTRL+RIGHT	{Rt}
CTRL+UP	{Up}
CURSOR LEFT	{Lt}
CURSOR RIGHT	{Rt}
DELETE	{Del}
END	{End}
ESC	{ESC} or {Escape}
ENTER	{CR}
Function keys	{F1}, {F2}, {F3}, etc
HOME	{Home}
INSERT	{Ins}
PAGE DOWN	{PgDn}
PAGE UP	{PgUp}
SCROLL DOWN	{Dn}
SCROLL UP	{Up}

Keys	Key Value
SHIFT+Function key	{*F1}, {*F2}, {*F3}, etc
SPACEBAR	{Sp} or {Space}
TAB	{Tab}
TAB (but not if the previous character triggered an Auto Tab Between Fields)	{Ctab}

FS Explorer Frame Initialization

Fourth Shift Explorer frames accept an initialization string, which allows the frame to display in one of the available modes. The following initialization strings are available:

Initialization String	Description
?Full=1	Start the FS Explorer frame type in Full Mode
?Full=0	Start the FS Explorer frame type in Simple Mode; this is the default mode if no initialization string is entered.
?Codes=1	Show function codes after screen titles
?Full=1&Codes=1	Combined

Other External Frame Initialization

Communication with frames containing other external web sites will vary. One way to determine the string used to navigate the web site is to manually click the options to access the desired page. Then review the URL address displayed to begin understanding what elements are included. The initialization string usually follows the URL address and begins with a question mark (?) character.

Contact your Fourth Shift consultant if you want assistance in setting up complex external frame communication.

Parent Frame

Parent Frame identifies which frame in the portal should be used as reference data for this frame. This correlation allows you to link some frames to one parent and other frames to another parent.

If this field is blank in the frame definition, the frame does not monitor data messages from another frame. My Fourth Shift Workplace will not automatically refresh the data in the frame.

See "Frame-to-Frame Communication" for more information on communicating information between frames.

Fourth Shift User Information

Fourth Shift User Information is the security information needed to access Fourth Shift from this frame. The **FS User Id** and **Password** is used only with Fourth Shift specific frame types.

Fourth Shift user information should be specified for private portals only. Passwords can be entered in the definition and the value is passed to the frame each time the portal is launched.

Default Frame Settings

Several defaults may be specified when defining frames for using the Find, Charting, terminal server, and Business Intelligence frames.

Default Finder

Default Finder identifies which type of data you are searching for when the Find feature is opened as an independent frame. You can specify to search for data such as customers, vendors, orders or items.

When the Find feature is accessed as an independent frame using the FS Finder frame type, you can also specify how the find results are used. If you want the selected results to force navigation of a child Fourth Shift WebUI to a different screen, then check the **Navigate Fourth Shift** checkbox. Leave this checkbox blank if you want selections to merely suggest that a child Fourth Shift WebUI Frame move to the selected object. For example, when finding items, the WebUI Frame will display that item if it is currently displaying item information and it will ignore the selection if currently displaying vendor data.

The default finder options are available when the **Frame Type** = **FS Finder**.

Default Chart

Default Chart identifies which type of graph or table to access when the Chart feature is opened. You can specify to access information such as inventory location, customer orders by month, customer orders by year and orders by month. The default chart option is available when the **Frame Type** = **FS Chart**.

Screen Size

Screen Size identifies the amount of display space to setup for a terminal server frame. The Windows application you run will see this as its display resolution.

Default Application

Default Application is the initial Windows application that is started in a terminal server frame. This menu of applications can be customized and will be displayed again if you terminate the application.

Default KPI

Default KPI is the Key Performance Indicator selected to appear in this frame.

Frame-to-Frame Communication

My Fourth Shift Workplace expands on technology available in Internet browsers to allow frames to pass data from one frame to another. This communication allows frames to react or change based on information sent from another frame. Inter-frame communication allows you keep data in all related frames tracking so that when you move to view that frame, the necessary related information is already displayed.

Terms

Review the following terms related to frame-to-frame communication.

- **Parent frame** is the frame that is the source of data communication. This frame publishes the data to the Portal Manager, which is running behind the scenes as part of My Fourth Shift Workplace.

- **Child frames** listen for the data communication from their parent frame. The child frame reacts to the data by refreshing the content of the frame based on the new data. If no parent frame is listed, users need to interact with the frame directly to change the data displayed.

- **Fourth Shift frame** types automatically support frame-to-frame communication.

- **External frame** types can either be another organization's web content (like DHL or UPS) or your own corporate intranet or web site. External frames can use data from a parent frame but

additional steps are needed to take advantage of the data. For example, you will need to identify initialization string elements to use in the URL address to refresh the external frame.

- **Links** are used by WebUI to identify navigation possibilities. For example, the **Item** field is a link to the Item Master on many WebUI screens. Links are normally displayed underlined if you have set your Internet Browser option to show links that way.

  Links also are used by WebUI in the frame-to-frame communication process to define which data elements are published to other frames. See "Communication Process" for more information.

Communication Process

Frames can communicate data between one frame and another. The methods used to communicate vary based on the frame type. The following rules apply to data communication between frames:

- **Linked Data.** The data published by Fourth Shift WebUI frames is determined by the data elements that are links to other screens. In other words, a message is published for each link on the parent screen.

- **Parent/Child Relationships for Fourth Shift Frame Types.** Fourth Shift frame types are able to take full advantage of the parent/child frame relationship. The linked data is communicated automatically between Fourth Shift type frames when the linked data is understood by the child frame.

- **Parent/Child Relationships for Non-Fourth Shift Frame Types.** External frame types are not aware of data that might be published by Fourth Shift frames. You can, however, develop your own web pages that are equipped to understand these messages. Use the sample applications provided with My Fourth Shift Workplace to use as a guide in developing your own pages. See the files in the Inetpub\WWWRoot\FSPortals\Sample directory.

  External frames that are managed by another organization, like DHL or UPS, or are located on an external server can also be set up to respond to published data. However, setting up this communication can be complex. If you wish to establish this type of link, work with your Fourth Shift consultant for further assistance.

- **Communication Limitations.** The communication feature builds upon technology embedded in Internet Explorer. This technology requires that the parent and child frames are both located within the same domain. Therefore if your Portal Manager is located on a site on server **MyServer.MyCompany.com**, the communicating frames can be on any server in the **MyCompany.com** domain. This means that Internet Explorer will not allow a frame from **MyServer.MyCompany.com** to communicate with a frame from **YourServer.YourCompany.com**.

- **Remembered Fields.** The Remembered Fields feature in Fourth Shift WebUI allows you to navigate from one screen to another and retain key data being viewed on the previous screen. The Remembered Fields feature is available within a frame only. It is not available for frame-to-frame communication.

Portal Images

Each portal definition is associated with a graphic image. This graphic is displayed in the Portal List. You can select from the set of images installed with My Fourth Shift Workplace, or you can create a set of your own.

If you create images:

- Create the images in JPG format.

- Use an image size with a width of 120 and a height of 60 pixels.

- Save the final images in the InetPub\wwwroot\FSPortals\Images directory.

Virtual Space

The display space within the Internet Explorer can be managed in one of two ways:

- You can select this option to place the frames within a large virtual desktop.

  Each frame will consume its full size within this space and you can scroll the entire Internet Explorer window around the virtual desktop.

- You can leave the portal's space to be that of the Internet Explorer window and use each frame's maximize button to expand the frame and reduce it back again to its original size.

Running Microsoft Windows-based Applications in a Portal

The Terminal Server frame type is used to run Microsoft Windows-based applications through a My Fourth Shift Workplace portal. For example, you can run Microsoft Access as part of a My Fourth Shift Workplace portal using the Terminal Server frame type. You can also run components of Fourth Shift that do not currently take advantage of web-based technology, such as the Sales Order Processing (SOPM) or Engineering (ENGM) module.

A Terminal Server frame starts a Microsoft Windows Terminal Server session on a remote client. Windows Terminal Server allows you to use an application on the server to which you are connected as if you were actually sitting at the server.

Implementing Terminal Server Frames

Windows Terminal Server is an optional Microsoft component that can be installed as a part of your Windows Server or Windows Advanced Server installation. Once installed, Windows Terminal Server runs as an automatic service. However, Windows Server contains only a temporary license for using Windows Terminal Server, and you must purchase a permanent license from Microsoft Corporation before using Terminal Server frames.

In order to use the Terminal Server frame type, it must be configured. Contact Fourth Shift Customer Support for more information.

Starting Applications in a Terminal Server Frame

When you create a portal with a Terminal Server frame, you select a default application to open automatically in the Terminal Server frame when the portal is started. If you close the default application during your portal session, you can use the application list to select another application to run in that frame.

The application list is defined as part of the Terminal Server configuration process, using XML files stored in the InetPub\WWWRoot\FSPortals\WTS directory on the My Fourth Shift Workplace server. You can easily modify these files once the initial configuration has been completed.

Alternatively, you may run any Windows application in the Terminal Server frame by selecting "Windows Desktop" as the startup application when configuring the Terminal Server frame. See "Run a Microsoft Windows-based Application" in the Fourth Shift Basics online manual for more information.

User Licenses and Terminal Server Frames

All Fourth Shift applications that are run through a Terminal Server frame use the same single user license as long as they are started using one of the following methods:

• the application is specified as the default application for the frame during portal setup

• the application is selected from the application tree in the Terminal Server frame

You can start a Fourth Shift application using a Terminal Server frame that displays the desktop if you wish, but any application started this way will consume an additional Fourth Shift user license. This method of starting Fourth Shift applications is not recommended.

ASP Sessions and Terminal Server Frames

Terminal Server Sessions are not the same as ASP sessions (for information on ASP sessions, see "My Fourth Shift Workplace User Information "). When the web browser connects to a terminal server, the ActiveX control in the frame establishes its own channel of communication with the Terminal Server, completely separate from the ASP session. Normally, it would be possible for different web browser instances, even on different clients to re-connect to the same Terminal Server session based solely on the use of the same Windows account when logging into the Terminal Server session. However, when a Terminal Server Session is started with a request to run an application at logon, an additional check is performed.

The session is identified not only by the account name used to log in, but also by the command line used to start the application when the session begins. Therefore, a user will only re-connect to a particular session when using the same log in and the same command line. Since FS Portals passes the ASP session ID on the command line when starting an application for a Terminal Server session, there is a close correlation between ASP Sessions and Terminal Server sessions, even though they are considered separate. That means that closing the browser and starting a new one will never be able to connect a user to their old session because that unique session ID will not be assigned again.

There are only two ways that a user could connect to an old session:

• Leave the browser window open, switch between portals, and switch back to the original Terminal Server portal. Log in as the same user. Because the same user and the same command line will be sent (containing the same Session ID) the user will be re-connected to the session.

• Switch to a Terminal Server frame that does not start up an application, but instead exposes the desktop. This will connect the user to any running session under the Windows account used to log in. If multiple sessions for that user are running, they will be presented with a list of sessions to select one.

Because these sessions are difficult to reconnect to, My FS Workplace will attempt to clean up a session instead of allowing it to continue running after it is disconnected. The action is similar to an automatic log-off when the connection is broken (when the portal is closed or switched to another portal). That means there is practically no way to reconnect to a running session once a user disconnects from it. This frees up licenses that may have been in use by that session. If the log off fails because a running application contains unsaved data or cannot exit at the time, the session (and any applicable license locks) will remain active until the application closes cleanly or until the Terminal Server disconnected-session timeout expires. Then the session will be closed, forcefully if necessary.

Portal Administration

Portal management can be done by users as well as administrators. You should consider how you wish to administer portals in your company as part of your overall system administration plan.

The following are some administration considerations:

- **Portal definitions** are stored in a Microsoft SQL Server (or SQL Express) database that is created when the server installation is done. This workplace database is called FSWorkplace by default. This technique allows users to run My Fourth Shift Workplace from any machine and use the portals defined for them.

- The **workplace database** should be included in your daily backup if you are concerned about restoring this information in the event of a system failure. See "Performing Daily Backups" in the My Fourth Shift Workplace manual for more information.

- The **portal administrator** is a user with the ability to perform the advanced administrative tasks for My Fourth Shift Workplace. By default, it is the user who installs the My Fourth Shift Workplace software who becomes the main portal administrator. Only a portal administrator can perform the following administrative tasks:

    - View and use the private admin portal groups (Portal Admin and Connectivity Toolkit)

    - Delete any public or private portal

    - Edit public portals

Printing and Generating Reports in WebUI

My Fourth Shift Workplace has printing and reporting features similar to the reporting functionality within Fourth Shift.

Reporting Features

- Most Fourth Shift screens can generate one or more reports. Select **Preview** or **Print** from the **Reports** menu to generate a report.

- Many batch process tasks also generate reports. Use the BEXE (Batch Execution) screen to specify the **Report Destination** for batch process reports.

  - If **Report Destination** = 1, the report is displayed in a separate window. It is not printed directly.

  - If **Report Destination** = 2, the report is printed to disk on the Fourth Shift server. The report is not displayed on your computer. In order to view the report, you must access it using a LAN or dial-up connection.

When you generate a screen report or batch process report, WebUI opens the report in a separate window after the report is generated. Each report opens a new window or in a new Internet Explorer tab. You can then print the report using any printer set up on your computer, or save the report to a file.

Note: The report will not be displayed until it is completely generated. Depending on the complexity and amount of data in the report, you may experience a slight delay before the report is displayed.

Template-based Reports

For template-based reports, a browser window opens containing the web-enabled version of the Crystal Reports viewer. This window displays the report.

RTF-based Reports

For RTF-based reports, a browser window opens containing Microsoft Word or Microsoft Word Viewer, if they are installed on your computer, and if one of them is defined as the default application used to view RTF files.

Other RTF file viewers will probably not be able to display reports acceptably. Reports are not displayed automatically in a browser window if you use an RTF file viewer other than Microsoft Word, Word Viewer, or Fourth Shift Report Viewer. Instead, you will be asked either to download the RTF file to their workstation for later viewing, or to open it directly on the server.

Microsoft Office is Installed
If Microsoft Office is installed on your computer, Microsoft Word is probably the default application used to view RTF files. You may want to consider changing the default application to Microsoft Word Viewer since that program will load more quickly than Word. Word Viewer is installed as part of the Word installation within Microsoft Office.

When you use Microsoft Word or Word Viewer, be sure that your **View** option is set to **Page Layout**. This option displays the document header and footer, which may contain report data.

Microsoft Office is Not Installed
If Microsoft Office is not already installed on your computer, it is recommended that you install Microsoft Word Viewer. Contact your system administrator for instructions.

Fourth Shift Report Viewer may also be used with acceptable results, although reports will not display in a browser window. Contact your system administrator for assistance in setting up Fourth Shift Report Viewer as your default application for RTF files.

Using Navigation Features

Fourth Shift WebUI offers a variety of system-wide features designed to provide flexibility and consistency across modules.

Using the Mouse

You can use your mouse to complete the following actions:

Action	Description
Select a menu option	Move your mouse over a menu, such as Reports, Tools or Help, to open it; then click a menu option to select it.
Select a portal bar link	Click any portal bar link to perform the command.
Move to related screen	Click any active tab to go to the tab. Click any link or the **Next Step** icon to go to the screen.
Go to an open field	Click the field to move quickly to that field.
Select from a list	Click any item in a selection list. The dialog closes and the data is inserted into the open field.
Activate a row	Click on the line marker in a scrolling line to go to the first open field in that row.
Select text	Click and drag over text in an open field to select it, or double click in any open field to select an entire word.
Go to the screen entered in the Function field	Click the **Go** button, which is next to the Function field.
Go to the previous screen	Click the **Back** button, which is next to the Go button.
Save data	Click **Submit**, which is in the lower right corner of the panel.
Change currency display	Click **Change**, which is the lower right corner of the panel when the MCMM (Multi-Currency Management) Module is installed.

Using Menu Options

Use the menu options to gain access to specific functionality. The menus are located in the upper right area of the screen and include the following:

Menu	Description
Reports	Generate reports for the screen. Use the mouse or Ctrl+R keyboard shortcut.
Tools	Access supplemental screen functionality, such as mass maintenance. Use the mouse or Ctrl+T keyboard shortcut.
Help	Use to gain quick access to context-sensitive help, including screen help, field help and field messages. Use the mouse or Ctrl+H keyboard shortcut.

Using Tools

My Fourth Shift Workplace WebUI has the same data entry and screen navigation tools as the traditional Fourth Shift program, but they are accessed differently. The data entry and screen navigation functionality is found on the Tools menu on My Fourth Shift Workplace.

Selecting from a Browse or Detail List
Use the **Browse/Detail** option on the Tools menu to select a record from a browse or detail list. For example, if you are on the **CO Number** field and you don't know the specific customer order number, use the Browse/Detail option to go to the Customer Order Browse screen. The Browse/Detail feature can also be accessed using the CTRL+B keys.

Setting up Defaults
Use the **Default Setup** option on the Tools menu to activate the default mask and open the Mask Setup window. You can use the Mask Setup window as a tool if you need to enter repetitive or similar data. The Mask Setup option is not available from all screens, but on some screens it is available as a tab, in addition to the Tools menu.

Using Extended Text
Use the **Extended Text** option on the Tools menu to enter descriptive, context-specific text messages. The Extended Text option is not available from all screens.

Performing Mass Maintenance
Use the **Mass Maintenance** option on the Tools menu to select an action such as mass updates. Mass maintenance actions are screen-specific. Each Mass Maintenance Menu displays only the actions available on the current screen.

Using Cash Reversal Selection
Use the **Cash Reversal** option on the Tools menu to go to the Cash Reversal Selection window. This option is only available when you are on the ARCD (A/R Cash Deposits) or ARPD (A/R Prior Period Cash Deposits) screens.

Adding Data
Use the **Add Data** option on the Tools menu to open a new line to add data to your screen. The Add Data feature can also be accessed using the CTRL+A keys.

Deleting Data
Use the **Delete Data** option on the Tools menu to delete the selected line from your screen and from the database. The Delete Data feature can also be accessed using the CTRL+D keys.

Field Action

Use the **Field Action** option on the Tools menu to perform an associated action for the current field. The Field Action option is only available from selected screens. The Field Action feature can also be accessed using the CTRL+F keys. You can use the Field Action option on the following screens:

Screen	Field	Description
Batch Process Execution (BSET)	Task	Display the task parameter formats and requirements.
	Parameters	Validate the task parameters.
Configuration of Interface Account Numbers (CNFA) F8	Master Account No	Display the organization and account description.
Customer Order Action (COAN)	Remaining Required Quantity or Ship Date	Display the item quantity (Order Qty and Shipped Quantity) that is available to promise.
Customer Order (COMT)	Item	Display the item description based on the type of item that was originally identified.
	Order Qty (no Prom Dlvry)	Display the date the quantity is available.
	Order Qty (and Prom Dlvry)	Display the availability of the quantity on the date.
	Prom Dlvry (no Order Qty)	Display the quantity available on the date.
	Ship Id	Scroll through ship ids until the desired information is displayed. Make changes as necessary and press ENTER.
	Tr LT	Based on the transportation lead time and promised delivery date, display the calculated shipping date.
	Unit Price (field empty)	For quoted customer items (LS = Q) display the quoted price, or the Customer Item Price defined for a previous order on the Custom Product Detail screen.
	Unit Price (field empty)	For standard items (LS = S) display the calculated price.
	Unit Price (value entered)	Display the adjusted price, or the comparison between the item's standard price and the actual price entered.
Custom Product Maintenance (CPMT)	Quantity (no Due Date)	Display the availability date for the quantity or capacity.
	Quantity (and Due Date)	Display the availability of the quantity or capacity based on the specified date.
	Due Date	Display the available quantity or capacity for a specific date.
Customer Name/ Address Detail (CUS1)	Ship Id	Scroll through ship ids until the desired information is displayed. Make changes as necessary and press ENTER.

Screen	Field	Description
G/L Recurring/Template Trans Detail (GLR1)	Cycles	Determine the number of cycles completed to date.
Planner Action (MOAN)	Open/Suggested Order Qty	Display the item quantity (Quantity Ordered and Quantity Shipped).
Option Selection (OPSL)	Configuration Qty / Reqd Date	When an item is set up on the Planning Detail screen to calculate ATP quantities (ATP = Y or P) you can determine when the required quantity is available and /or what quantity is available on a specific date.
Buyer Action by Vendor (POAN/POAS)	Open/Suggested Order Qty	Display the item quantity (Quantity Ordered and Quantity Rcvd)
Picklist (PICK)	Reverse Quantity	Display information on quantity required, issued and allocated.
Purchase Order (POMT)	Unit Price	Load the unit price for the new order quantity as defined on the POCT screen.
PO Line Item Detail (POM2)	Conv or UM	Display the most current values.
Bill of Lading (SBOL)	Ship to Id	Scroll through existing ship ids; press ENTER to select one
Ship (SHIP)	Reverse Quantity	Display information on quantity required, issued and shipped.
	Shipment Quantity	Display information on quantity required, issued and shipped.
Packaging Detail (SHI1)	Package Typ, Line Item Quantity, Weight or Volume	Calculate the package values. A net change might be calculated when adding items to an existing package.
	Weight	Calculate the package weight when you combine items in packages.

Toggling Currency Information

Currency information is displayed in a boxed area near the bottom of the WebUI frame if your Fourth Shift system includes the Multi-Currency Management Module (MCMM). Currency information includes the currency description and exchange rate.

Click the **Change** button to toggle all monetary values on the screen between the local currency and the foreign currency.

Using Portal Bar Links

Use the portal bar to gain access to specific functionality. The portal bar links are located in the upper right area of My Fourth Shift Workplace portal and include the following:

Link	Description
Portal Security	To grant and revoke admin rights. Only shown for a portal administrator.
Preferences	Edit portal and location preferences.
Save Layout	Allows you to save changes to the size and position of the frames within the portal layout.
Log Off	The preferred method to close My Fourth Shift Workplace.
Help	Opens help for My Fourth Shift Workplace.

Differences in My Fourth Shift Workplace

Several differences exist in My Fourth Shift Workplace with which existing Fourth Shift users may not be familiar.

Fourth Shift WebUI Compared to Fourth Shift GUI

- Reports generated from My Fourth Shift Workplace are displayed on screen in a browser window if **Report Destination** = 1 (printer) on the BEXE (Batch Execution) screen. This allows you to select a desired printer.

- Files generated by the following tasks in My Fourth Workplace are created on the server instead of on your workstation: ACCX (Access Extract), ASCX (ASCII Extract), DBSX (dBase Extract) and EXLX (Excel Extract). You also can transfer these files to your client if desired. If you want these files to be generated on your local machine, you need to use the traditional Fourth Shift program.

- On the BEXE (Batch Process Execution) screen, the ability to show or hide details is no longer needed since detail messages are always shown during processing. Also, the Stop button has been split into two buttons called **Stop Task** and **Stop Batch** so that a second dialog is not needed.

- The following parameter functionality is no longer available when using the IMPT (Data Import) and RCVR (System Recovery) tasks:

   - **S Parameter: Step Mode**. The Step Mode ability of the S parameter is not available in WebUI. The Step Mode ability allowed you to start the import process in single step mode so you could review each keystroke for troubleshooting purposes. The other S parameter abilities, such as allowing you to Pause, Continue or Stop, are still available.

   - **Vx Parameter: View Mode**. The View Mode (Vx) parameter is not available in WebUI. This parameter allowed you to control how the user interface was displayed during import processing. You could hide transaction processing (VH), minimize the entire Fourth Shift session (VM) or show transaction processing (VS).

   The specified parameter functionality is not needed to save processing time. WebUI will always run in a manner similar to using hidden windows for the fastest performance.

You can use the traditional fat client Fourth Shift program to run the IMPT and RCVR tasks using the S parameter for Step Mode and the Vx parameter for View Mode, if desired.

- The size of each screen is based on its original size in Fourth Shift. For example, several detail screens in Fourth Shift WebUI are smaller than the main screens because these detail screens were smaller than the main screens in Fourth Shift.

- Several Fourth Shift modules do not take advantage of My Fourth Shift Workplace web-style features. See "Restricted Features" in the My Fourth Shift Workplace manual for more information on which modules need to run under a Windows Terminal Server frame.

Internet Explorer Options Compared to Fourth Shift WebUI

Several similar menu options and buttons are available from your Internet Explorer (IE) browser and from within Fourth Shift WebUI.

- **Menus**. Use the menus from the IE browser if you want to use the IE browser functionality. For example, use Internet Options from the Tools menu to configure your browser. Use the menu options from within Fourth Shift WebUI if you want to use Fourth Shift functionality. For example, use Browse/Detail from the Tools menu to open browse or detail windows.

- **Buttons**. Use the buttons from the IE browser if you want to use the IE browser functionality. For example, click the Favorites button to open your list of favorite sites.

It is recommended that you do **not** use the first group of buttons (Back, Forward, Stop, Refresh and Home) from the IE browser while you are working in Fourth Shift WebUI. Instead, it is recommended that you use the buttons from within Fourth Shift WebUI to use Fourth Shift functionality.

My Fourth Shift Workplace: How Do I?

This section is a guide to the activities or tasks you can perform using My Fourth Shift Workplace. Each activity includes:

- **Procedures—**the step-by-step instructions for performing the activity.

- **Tips**—this section includes important notes, pointers, and standard information you should know in order to perform the activity.

For detail information on using a specific Fourth Shift screen, choose *Screen Help* from the **Help** menu. Activities are separated into functionality categories.

Add Charting Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click the **Add a New Portal** icon.

3. Enter the **Portal Name**.

4. Select the **Private/Public** portal type.

5. Do one of the following to select the **Portal Group**.

   - Select an existing group from the drop-down list

   - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.

      a. Add a **New group name** for your user information.

      b. Select the **Private** or **Public** portal type.

      c. Click **OK**.

6. Select whether you want this to be in a large virtual space or not.

7. Select the **Layout tab**.

8. Define the number of frames in this portal.

9. Enter frame definition information for your portal:

   - frame title

   - frame type = **FS Chart**

   - location

   - parent frame = Frame A or B—select the one where the Fourth Shift WebUI frame is located, based on your portal layout

   - default charts

10. Click the **Image tab** and select an image for your portal.

11. Click the **Save** button to save your changes, or click the **Add** button again to discard your changes.

   Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click the new portal.

Tips
- To select a chart that starts by default when the portal is accessed, expand the **Default Chart** list and select a graph or table.

- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.

Add Finder Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click the **Add a new Portal** icon.

3. Enter the **Portal Name**.

   - This name *must* be unique from all other portals that you have created.

   - If it is a public portal, the name must be unique name from all other public portals.

4. Select the **Private/Public** portal type.

5. Do one of the following to select the **Portal Group**.

   - Select an existing group from the drop-down list.

   - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.

     a. Add a **New group name** for your user information.

     b. Select the **Private** or **Public** portal type.

     c. Click **OK**.

6. Select whether you want this to be in a large virtual space or not.

7. Select the **Layout tab**.

8. Define the number of frames in this portal.

9. Enter frame definition information for your portal:

   - frame title

   - frame type = **FS Finder**

   - location

   - parent frame = Frame A or B—select the one where the Fourth Shift WebUI frame is located, based on your portal layout

   - Fourth Shift log on information

   - navigation = select if you want the Find feature (parent) to navigate Fourth Shift WebUI (child) based on the Find feature's data selections.

   - default finder

10. Click the **Image tab** and select an image for your portal.

11. Click the **Save** icon to save your changes, or click the **Add** icon again to discard your changes.

12. Click **Close** to exit the portal update process.

Note: To view your new portal, click **Start Portals** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click on your new portal.

Tips

- When accessing the **Find** feature through a portal frame, you are prompted to log on to Fourth Shift. You can enter this log on information (user id and password) when creating the frame type so that you are not prompted for it when the Find feature is accessed.

- When the Find feature is defined as a parent frame, an option is available to set the level of navigation:

  - Option Selected. The Find feature (parent) sends a message to Fourth Shift WebUI (child) and Fourth Shift WebUI changes to the desired screen and the data is entered into the appropriate field.

  - Option Not Selected. The Find feature (parent) sends a message to Fourth Shift WebUI (child) and if the desired screen is already displayed, the data is entered into the appropriate field. If the desired screen is not displaying the desired screen, the data is not entered.

- To select a finder that starts by default when the portal is accessed, expand the Default Finders list and select a finder.

- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.

Add Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click the **Add a New Portal** icon.

3. Enter the **Portal Name**.

   - This name *must* be unique from all other portals that you have created.

   - If it is a public portal, the name must be unique name from all other public portals.

4. Select the **Private/Public** portal type.

5. Do one of the following to select the **Portal Group**.

   - Select an existing group from the drop-down list

   - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.

     a. Add a **New group name** for your user information.

     b. Select the **Private** or **Public** portal type.

     c. Click **OK**.

6. Select whether you want this to be in a large virtual space or not.

7. Select a **Layout tab**.

8. Define the number of frames in this portal.

9. Enter frame definition information.

   For example, enter the frame title, frame type, location, parent frame and default settings to customize your portal.

10. Click the **Image tab** and select an image for your portal.

11. Click the **Save** icon to save your changes or click the **Add** icon again to discard your changes.

12. Click **Close** to exit the portal update process.

   Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click your new portal.

Tips
- Public portal definitions are available for any user to access but they can only be changed or deleted by the portal administrator.

- Private portal definitions are saved by your Windows login identifier.

- If you wish to create a new portal group, click **New Group** and enter the new group information.

- Portal images must exist in the Inetpub\WWWRoot\FSPortals\Images directory. You can add .JPG files to this directory, if desired.

- Portal layout can only be defined when you create a new portal definition.

- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.

- Several optional settings are available for FS Finder and FS Chart frame types, such as specifying the default Chart or Find type, and whether the Find results navigate the Fourth Shift application.

Add Portal Group

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click the **Add a New Portal** icon.

3. Click **New Group** to display the **Add New Group** dialog window.

4. Add a **New group name** for your user information.

5. Select the **Private** or **Public** portal type.

6. Click **OK**.

   The portal group is now available for use in a portal definition.

Tips
- Portal groups can be deleted and given to other users in a group tree.

- Private groups are saved by your Windows login identifier.

Add Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click **Locations**.

   The **Edit Known Locations** dialog is displayed.

3. Enter a new **Location Name**.

4. Enter a **Location URL**.

5. Enter the **Configuration File**.

6. Select one or more of the **Supported Frame Types**.
   Note: The Arbitrary site and Named Site Frame Types are always supported.

   - FS Chart

   - FS Explorer

   - FS Explorer Security

   - FS Finder

   - FS UIEditor

   - FS WebUI

   - Terminal Server

7. Click **Add New**.

   The **Defined Locations** list is updated and your new location is listed.

   Note: Because the **Location Names** are visible to users, we recommend using names that clearly identify what the URL address accesses. For example, use a location name like *Colorado Plant* rather than a server name like *CCSVR-21*.

Change Default Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Select one of the predefined portals from the **Default Portal** drop-down list.

3. Click the **Save** icon.

   The **Edit Preferences/Portal** screen displays the **Changes saved** message.

Tips
- Only public portals and your private portals can be selected.

- Create a new portal if none of the predefined portals meet your needs.

- To change back to the original default portal, select the *Start Portal* option from **All Public Portals** panel or click the **Start Portal** button in the upper-left corner.

- You can customize the links in the original default portal.
  For example, you can customize the "Your Company Home Page" link by updating the default link with your own company home page address.

Change Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Select the portal you want to work with from the **Portal Maintenance** drop-down list.

3. Click the **Edit this Portal** icon.

4. Use the **General Layout** and **Image tabs** to display and change the definition.

   For each frame in your portal, review and update the frame detail as needed.

5. Click the **Save** button to save your changes, or click the **Edit** button again to discard your changes.

6. Click **Close** to exit the portal update process.

Tips
- The Portal layout option cannot be changed. You must create a new portal to change the number or configuration of frames.

- If you wish to change the order of the frames, change the frame definitions to display the desired content.

Change Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click **Locations**.

3. Highlight the **Defined Location** you wish to change.

4. Review and change the **Location Name** if necessary.

5. Review and change the **Location URL** if necessary.

6. Review and change the **Configuration File** if necessary.

7. Update the **Supported Frame Types**.

8. Click **Update**.

Tips
- Changes to predefined locations are available to users immediately.

Delete Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Select the portal you want to work with from the **Portal Maintenance** drop-down list.

   Important: Deleting a portal is *permanent*—there is no *Undo*.

3. Click the **Delete this Portal** button.

   The **Delete Confirmation** dialog message is displayed.

4. Verify that this is the correct portal then click **Yes**.

Tips
- Portal definitions must be recreated if you accidentally delete a portal.
- Public portals can only be deleted by the Portal Administrator.

Delete Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click **Locations**.

3. Select the location you want to delete from the list displayed for **Defined Locations**.

   Important: Deleting a location is *permanent*—there is no *Undo*.

4. Click **Delete**.

   The location is deleted and the **Defined Location** list is automatically updated.

Tips
- If the predefined location is referenced in a portal definition, the predefined location cannot be deleted.

Update Fourth Shift Explorer Security Data

In order to make security changes available to Fourth Shift Explorer frames in My Fourth Shift Workplace portals, an additional step is required.

1. Log in to My Fourth Shift Workplace as the portal administrator.

2. Select the **Explorer Security** portal from the *Portal Admin* group.

3. Select the location of the My Fourth Shift Workplace server from the list.

4. Choose whether to update security for all users, or for only a single user.

   - If you choose to update security for a single user only, enter that user's Fourth Shift **User ID**.

5. Click **Update**.

Tips
- These steps must be completed whenever security changes are made to the FCMT (**Function Code Maintenance**) or PASS (**Password Maintenance**) screens in Fourth Shift.

Change Explorer Mode

Several modes are available when using the Fourth Shift Navigation panel.

Switching to Full Mode

In Full Mode, you can search for a specific function based on a keyword. Use these steps to switch from the default Simple mode to Full Mode.

1. In the Explorer frame, click on the **Switch Mode** link to switch to Full Mode.

2. Click on the arrow next to the module name to expand the list of functions in the module.

   - You can go directly to the function by clicking on the function.

   - Alternately, you can enter starting data before going to the function:

   a. Click on the arrow next to the desired function to open the parameter fields, if available.

   b. Enter specific starting data in the parameter fields.
      The starting data is used when navigating to the function.

   c. Click **Go** to go to the selected function using the entered starting data.

Switching to Simple Mode
In Simple Mode, the available Fourth Shift modules are listed in alphabetical order. Use these steps to switch from Full Mode back to the default Simple Mode.

1. In the Explorer frame, click on the **Switch Mode** link to switch to Simple Mode.

2. Click on the arrow next to the module name to expand the list of functions in the module.

3. Click on the function to go to that screen.

Tips
- You can click on the arrow to expand or collapse the list of modules or screens.

- You can use keywords to search through the screens and tasks by selecting a keyword from the drop-down list and clicking the **Search** button. Only those screens and tasks that relate to the keyword are displayed in the navigation results.

- When you click on a screen or task to go to that location, the location change information is sent to the portal frame that is "listening" to the Fourth Shift Explorer frame.

- You can toggle back and forth between showing and hiding the function codes in the navigation list using the **Show Codes** and **Hide Codes** links.

Search by Keyword

1. In the Explorer frame, click the **Switch Mode** link to switch to Full Mode.

2. Click to open the drop-down list of available keywords.

3. Select a keyword and click the **Search** (magnifying glass) button.

4. Click on the arrow next to the results list to expand the list.

5. Click on the desired function or activity.

Tips

- You can search by keyword using either the Full Mode application view.

- For example, you can search for "credit memo" and only those functions that relate to credit memos are listed in the results.

- You can toggle back and forth between showing and hiding the function codes in the navigation list using the **Show Codes** and **Hide Codes** links.

Access Help

Several methods are available for accessing help for My Fourth Shift Workplace and portals.

Context-Sensitive Help in Fourth Shift WebUI

1. Use the options in the **Help** menu on the current tab to review context-sensitive help for the function.

2. Click the **X** in the upper-right corner of the help window to close the window.

My Fourth Shift Workplace and Portals

1. Click the **Help** link in the My Fourth Shift Workplace portal bar.

2. Use the tabs to review the detail on using My Fourth Shift Workplace and portals.

Close My Fourth Shift Workplace

Important: We strongly recommended that you *do not* use the Internet Explorer **Close** button (☒) to exit My Fourth Shift Workplace. Closing the Internet Explorer *does not* exit the Fourth Shift WebUI application—it will continue to run until the session times out.

1. Click the **Log Off link** in the upper-right corner of My Fourth Shift Workplace portal.

   The **Goodbye** page is displayed and you are notified that the *Fourth Shift Portals session* has ended.

2. Do one of the following:

   - Click the Internet Explorer **Close** button (☒) to close the browser window.

   - Click the *here* link on the *Goodbye* page to start a new My Fourth Shift Workplace session.

Tips
- You are not allowed to close My Fourth Shift Portal session if you have not completed the current transaction in a Fourth Shift WebUI frame. For example, from the APIE (**A/P Invoice Entry**) screen, a warning message is displayed if you click the **My Fourth Shift Portal** button *before* you've completed the G/L distribution.

- We recommend that you use the **Log Off** portal bar link to exit My Fourth Shift Workplace.

Select Portal from List

1. Click **Start Portal** or the portal name in the My Fourth Shift Workplace portal bar to open the portal manager (in the upper left-hand corner).

2. Select one of the following to open a list of available portals.

   - **Group Tree**—to view a hierarchical tree of private and public groups.

   - **All Public Portals**—to view a list of available public portals.

   - **Private Group Name—**to view a list of your private portals in that group.

3. Click the portal icon located above the portal name you want to work with.

   Your selected portal is displayed automatically.

   Note: Click the portal or group name to toggle between *show* or *hide* when displaying the list of portals or groups.

Tips
- Private portal definitions are only available to the user who created them.

- To change back to the original default portal, select the **Start Portal** option.

Run a Microsoft Windows-based Application

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.

   The **Edit Preferences/Portal** screen is displayed.

2. Click the **Add a New Portal** icon.

3. Enter the **Portal Name**.

4. Select the **Private/Public** portal type.

5. Do one of the following to select the **Portal Group**.

- Select an existing group from the drop-down list

- Click **New Group** to display the **Add New Group -- Web Page Dialog** window.

    a. Add a **New group name** for your user information.

    b. Select the **Private** or **Public** portal type.

    c. Click **OK**.

6. Select whether you want this to be in a large virtual space or not.

7. Select the **Layout tab**.

8. Define the number of frames in this portal.

9. Enter frame definition information—select **Type** = *Terminal Server* for at least one of the frames.

   This is the frame through which you can run an external application.

10. Select the **Default Application** you would like to run through the Terminal Server frame.

    For example, if you would like to run the Fourth Shift Shop Calendar in this frame, expand the "Fourth Shift WTS Applications" tree and select "Fourth Shift Shop Calendar." This is the application that will start by default when the portal is started.

11. Click the **Image tab** and select an image for your portal.

12. Click the **Save** button to save your changes, or click the **Add** button again to discard your changes.

13. Click **Close** to exit the portal update process.

    Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click on your new portal.

Tips
- Private portal definitions are only available to the user who created them.

- If you want to run any Windows desktop application from a Terminal Server frame, select "Windows Desktop" as the startup application when configuring the Terminal Server frame.

Save Find Feature Settings

1. Open the **Finder** feature either as a frame or a popup window from WebUI.

2. Select the fields to display in each column.

3. Specify filter criteria, if desired.

4. Click the **Reload data** icon.

   The results are displayed in the Finder pane.

5. Click the **Save settings** icon.

Tips
- Settings are saved differently separately for each type of Finder.

- Settings are saved by workstation, not by User ID. You must have the necessary Internet security that allows cookies to be stored on your workstation in order to save settings.

Specify Finder Feature Criteria

1. Do one of the following to open the **Finder** feature:

   - **From a field within Fourth Shift WebUI**:

      a. Point to the *Find* icon.

      b. If this field has a menu of options, use the down arrow to display it.

      c. From the list displayed, select **Find** <data>.

   - **From a portal frame**:

      a. Select the portal from your portal group that has been assigned the **FS Finder** frame type.

      b. If prompted, log on to Fourth Shift using your **User ID** and **Password**

2. Select the fields to filter by and specify filter criteria, if desired.

3. Click the **Reload data** icon.

4. Click the arrow row marker to select the data.

   The data is entered into the active field.

   - The **Finder** feature *closes*, if it was accessed from within Fourth Shift WebUI.

   - The **Finder** feature remains *open*, if it is a separate portal frame.

Tips

- As an alternative, you can press **Ctrl+Down Arrow** to open the list and then press the up/down arrow keys to move within the list. **Tab** or **Enter** will select the highlighted item.

- Click the **Clear Criteria** icon to remove the filter criteria from all fields.

- Click the **Save settings** icon to retain your sort order and filter criteria for the current session.

- If starting data was entered in the originating field before accessing the Find feature, this data is automatically entered into the filter criteria. If starting data was not entered, the Find feature opens and you can enter filter criteria in the row of available fields.

- When entering criteria, you can enter a space before the specified value in order to display a list of all the identifiers that contain the criteria anywhere in the identifier. Without the space, the list includes only the identifiers with the criteria as starting characters.

- To change the sort order, click on the header of another column. To reverse the sort order from ascending to descending, click on a column header that is already sorted. The sort order is saved when **Save Settings** is selected.

- The Finder feature uses field-level security, which allows only the users who are assigned the appropriate security to see certain fields. See the **Assigning Security** topic, in the *Fourth Shift Basics* online Help, for more information on security for the Find feature.

Using Order Number Assignment

The **Order Number Assignment** feature provides an easy method of automatically generating sequential order numbers for customer, purchase and manufacturing orders. The Order Number Assignment feature can be accessed from either Fourth Shift WebUI or the traditional Fourth Shift system. Both user interface types will use the same order number assignment database and will work correctly for a mix of users.

Setting Up the Configuration

You configure the Order Number Assignment feature by setting options and defining formats on the Order Number Assignment Configuration window. Once defined, the formats are used to assign order numbers when selected.

Opening the Configuration Window

The Order Number Assignment Configuration window is accessed by selecting the *Order Number Assignment* option on the **OACF** screen.

Defining the Order Number Format

You can independently define different formats for purchasing, manufacturing and customer order numbers. Each order number format may contain up to 30 characters and can contain several sections, including a prefix, current date and numeric sequence.

Prefix. A prefix is optional and includes the following:

Description	Recommendations	Example
Initial set of characters that remains constant as order numbers are assigned; which allows you to group or categorize different types of purchasing, manufacturing or customer orders. When using Fourth Shift WebUI, a prefix can be configured to be either alpha or numeric characters. It is recommended to use a prefix limited to 3 characters.	Prefix length should be less than 6 characters so that the order number format has enough characters for the current date and a numeric sequence, if desired.	Prefix can be 3 characters if the current date and a 5-character numeric sequence are used.

Current Date. A date is optional and includes the following:

Description	Recommendations	Example
The date that can be inserted into order number formats using the **Insert Date** button when using Fourth Shift WebUI or the F6 key when using the traditional Fourth Shift system. The date is formatted according to the **Date and Number Format** field on the **CNFG** screen, not by the default short date setting of the workstation. The date is 7 characters, which includes a 6 character date (MMDDYY) plus a trailing dash (-). The value of the date field is determined by the Fourth Shift system date.	Use the **Last-Assigned Order Date** field to identify the date of the most recently assigned order number. Set the value of the **Daily Reset of <DATE>-Type Orders** field to Y to restart the sequence of order numbers at the beginning of each day.	To ensure proper sequencing, the system compares the sign-on date with the **Last-Assigned Order Date** and prevents order number assignment. This feature guards against erroneous order number assignment that could occur when a user inadvertently signs on with a date earlier than the system date.

Numeric. A numeric is required and includes the following:

Description	Recommendations	Example
Unique "starting at" number sequence which increases each time an order number is assigned from that specific format.	The numeric sequence, date and prefix combination cannot exceed 15 characters. In the order format, numeric values are displayed using the # symbol. The actual number is not assigned until the format is selected.	Numeric sequence can be 5 characters if a 3-character prefix and the current date is used; or 8 characters if only the current date is used.

Assigning Order Numbers

To assign an order number when using Fourth Shift WebUI, point to the icon (gold oval with exclamation mark) located to the right of the Order Number field and from the menu select Order Number. You can also press **Ctrl+E** to open the menu and then press **O** to *open* the Order Number Assignment feature.

Based on the number of order number formats defined, the order number is assigned using one of the following methods:

Method	Reason	Example	Steps to Continue
List displays	More than one order format for an order type has been defined	If you are assigning customer orders, and CO-#### and CO-<DATE>-### are both defined as order number formats on the Order Number Assignment Configuration window, a dialog opens and both formats are listed.	Click on the format you want and the generated order number is entered into the field.

Method	Reason	Example	Steps to Continue
Automatically enters number	Only one order number format has been defined for an order type	If you are assigning purchase orders, and only one purchase order format is defined on the **Order Number Assignment Configuration** window, the next sequential number is automatically entered into the Order Number field using that format.	Continue to the next field to enter order details

The Customer Order Number Assignment feature is not used with the SOPM (Sales Order Processing) Module. If you are also using the SOPM Module see "Customer Order Number Prefixes" in the Sales Order Processing manual for more information.

Assigning Order Numbers by Multiple Users

Multiple users can use the Order Number Assignment feature simultaneously, and the order numbers increase sequentially. This multi-user capability is allowed since the actual order number is generated after the order format is "selected" by the user, and not when the selection list is displayed.

When the Order Number Assignment feature is accessed from traditional Fourth Shift, automatic order number assignment is locked to other users while the Order Number Assignment window is displayed. Locking does not need to occur when accessing the Order Number Assignment from Fourth Shift WebUI.

Summary of Order Number Assignment Feature Differences

The Order Number Assignment feature can be accessed from either Fourth Shift WebUI or the traditional Fourth Shift system, but several differences may be noticed between the two access methods. Differences include:

Action	Fourth Shift WebUI	Traditional Fourth Shift
inserting a date in a format	click **Insert Date**	type <DATE>
defining an optional prefix in a format	up to 15 alphanumeric characters are possible	
saving a format	click **Submit**	press ENTER
opening the order number assignment window	point to the icon (gold oval with exclamation mark) next to **Order Number** field or press Ctrl+E+O.	press Alt+F8 in the **Order Number** field
selecting an order number	select the order number format from the list, but the actual order number is displayed as a mask; for example, you select MO-####	select the actual order number from the list; for example, you select MO-1212 Alt+F4
having multiple users	multiple users can use the Order Number Assignment feature simultaneously	multiple users can only use the Order Number Assignment feature sequentially

Troubleshooting

Use the following to assist you while using the Order Number Assignment feature:

Assigned Order Date Not Current

Use the **Order Number Assignment Configuration** window to review the date entered as the **Last-Assigned Order Date**. To ensure proper sequencing, the system compares the sign-on date with the **Last-Assigned Order Date** and prevents order number assignment. This feature guards against erroneous order number assignment that could occur when a user inadvertently signs on with a date earlier than the system date.

Order Number Assignment Feature Unavailable

When using the **Fourth Shift WebUI**, you may be momentarily restricted from accessing the next sequential order number if an order number in the traditional Fourth Shift system is displayed but not yet selected. The system tries to access the next sequential number for a period of time before this message is displayed. Refresh your screen and try again.

There are no available <type> order numbers

The order number format has reached its highest number, and therefore cannot generate any more order numbers. To generate more order numbers, you need to create a new order number format. Review the required use of the format so you can specify sufficient sequential numbers for the expected order volume when defining the format. For example, the order number format MO-## limits you to 99 orders, where MO-#### allows 9999 orders.

You must select an Order Type to find an order

Several screens, such as LRRP, require that an order type be selected before opening the Order Number Assignment window. Verify you have selected an Order Type and try again.

Using Fourth Shift Report Viewer

Fourth Shift Report Viewer is a program used to display reports before they are printed, or to open previously saved reports. It allows you to view any page of the report, and print the report on any printer set up on your computer. You can also save the report as a file on your computer, or open a previously saved report.

You can access Fourth Shift Report Viewer from any screen that generates a screen report by choosing **Print Preview** from the **File** menu. The **Print Preview** option is available only for screen reports. You can also access it by selecting **Report Viewer** from the Fourth Shift **Tools** menu.

Fourth Shift Report Viewer can open, print and save both template-based and RTF-based reports.

Printing Reports in Fourth Shift Report Viewer

Do one of the following to print a report from Fourth Shift Report Viewer:

- Choose **Print** from the **File** menu to specify a printer or fax machine, or to specify a range of pages to be printed
- Click **Print** on the toolbar to print the entire report on your computer's default printer

To change the paper size, specify portrait or landscape orientation, or modify any other printer settings, choose **Print Setup** from the **File** menu before printing the report.

Previewing Reports in Fourth Shift Report Viewer

Fourth Shift Report Viewer allows you to preview a report on your screen before it is printed. You can check the layout and content of a report before printing, or simply review and close a report without printing.

Normal and Preview Views of RTF Files
Fourth Shift Report Viewer provides two viewing options for previewing a report: *Normal* and *Preview*. Each time Fourth Shift Report Viewer opens, it is in *Normal* view. To switch to the *Preview* mode, select **Print Preview** from the **File** menu. Click **Close** to return to the Normal view.

The viewing option you choose does not affect the layout of the actual report. In Preview mode, you can do the following:

- see the printer margin area
- print the report
- display one page at a time, or two pages side by side
- zoom in for a detailed view or zoom out to see the overall layout of the report

Moving Between Pages

Many reports contain more than one page. In Normal view mode, page breaks are shown on your screen by a dotted horizontal line. In Normal view, do one of the following to move between pages in a report:

• Use the vertical scroll bar to scroll between pages

• Use the toolbar buttons or the options in the View menu to move to the first, next, previous or last page

• Enter a specific page number in the toolbar then press **Enter**

Print Preview and Action Messages

A number of Fourth Shift action messages instruct you to print a specific document. Typically, when you print the document, the action message is deleted.

For these documents, selecting **Print Preview** is treated the same as printing the document.

• If you choose to **Print Preview** one of these documents, Fourth Shift assumes that the document has been printed, and the action message is deleted.

• *Do not* use **Print Preview** for these documents unless you plan to print the report at that time.

These action messages include:

Action Messages	Description	Document Printed From
ACK	Print order acknowledgment	COMT
PMO	Print manufacturing order	CPMT, MOMT
PPL	Print picklist	PICK
PPO	Print purchase order	POMT

Saving Screen Reports Using Fourth Shift Report Viewer

After you have previewed a newly-generated, or previously-saved, screen report, you can use the Fourth Shift Report Viewer to save it to a file.

Other Ways to Save a Screen Report

If you want to save a screen report (if available) without previewing it first, use the **Print Export** from the **File** menu. You can choose from several file formats when saving the report using the Print Export option.

Viewing Batch Process Reports Using Fourth Shift Report Viewer

Reports generated by batch process tasks are printed to disk as a file if you selected **Report Destination** = 2 for the task.

You can view these reports only after they are created. You cannot preview a batch process report as part of the batch process itself. You can, however, add a line to a batch process that opens the report using Fourth Shift Report Viewer, prints the report automatically, or converts the report file to plain text format. For more information, see Fourth Shift Report Viewer Command Line Parameters.

Open the Fourth Shift Report Viewer by choosing **Report Viewer** from the **Tools** menu. Locate the report you want to view and click **Open**. Be sure to select **All files** in the **Files of type** box, because batch process report files use the Process Id of the batch process as the file extension.

Note: If you regularly need to view report files, you may want to customize the toolbar by adding a button that opens the Fourth Shift Report Viewer. For more information, see the **Customizing the Toolbar** topic in the *Fourth Shift Basics* online Help.

Converting Saved Reports to Plain Text Format

There may be times when you need to convert a screen or batch process report file to plain text (TXT) comma-delimited format. Although you cannot change the file format when you save the report, you can run the Fourth Shift Report Viewer (FSPRINT.EXE) silently, using a command line parameter that performs this conversion.

The syntax for this command line parameter is as follows:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE  <report file name>  /text  <text file name>
```

For example, to convert the saved batch process report file M:\MFGSYS\PORR01.PUR to a plain text file in the same directory with a .TXT file name extension, use a command line similar to the following:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE  M:\MFGSYS\PORR01.PUR  /text
M:\MFGSYS\PORR01.TXT
```

You can perform this conversion using any command line execution method, such as a batch file, batch process, shortcut, or the **Run** dialog box. For more information on operating Fourth Shift Report Viewer from a command line, see "Fourth Shift Report Viewer Command Line Parameters."

Adjusting Report Fonts and Margins

You can change the look of your printed RTF-based reports by modifying the fonts and margins. To do this, you must add or modify lines in your FS.CFG (or [system name]LOCALFS.CFG) file.

The default font for reports is 10 point Courier New. You can modify this by changing value of the **RtfReportFontName** configuration variable. You can improve the speed of report printing on dot matrix printers by using a printer font instead of a TrueType font.

The default margin on the left side of the page is 13/36 inch, with no top, bottom or right margin. To modify these characteristics, add or change the following configuration variables:

Configuration Variable	Description
RtfBarCodeFontName	Name of bar code font
RtfBarCodeFontSize	Size, in ½ points, of bar code font
RtfReportFontName	Name of standard report font
RtfReportFontSize	Size, in ½ points, of standard report font
RtfReportFontSizeCompress	Size, in ½ points, of report font in compressed width areas
RtfReportLineSpacing	Distance between baselines of consecutive lines
RtfTwipsMarginTop	Size of top margin
RtfTwipsMarginBottom	Size of bottom margin
RtfTwipsMarginRight	Size of right margin
RtfTwipsMarginLeft	Size of left margin
RtfTwipsGutter	Size of gutter

Configuration Variable	Description
RtfTwipsHeaderY	Position of report header
RtfTwipsFooterY	Position of report footer

> **Note:** These configuration variables have no effect on template-based reports. You can adjust the report fonts and margins on those reports by customizing the report template.

For more information, see "Configuration Variables" in the *System Administration* manual.

Fourth Shift Report Viewer Menus

Fourth Shift Report Viewer has three menus containing options for displaying, saving and printing reports.

Fourth Shift Report Viewer Command Line Parameters

You can create a shortcut to the Fourth Shift Report Viewer, or include it in a batch process or batch file, by using the following command line syntax:

```
FSPRINT <filename> [/title <title>] [/dir <dir>] [/save [<outfile>] | /
print [/ask] | /text [<outfile>] | /showopen]
```

Parameter	Description
<filename>	Specifies the name and fully qualified path of the file to be opened, printed or converted.
/title <title>	Used to set the window title of the document when opened in Fourth Shift Report Viewer.
/dir <dir>	Used to set the default directory of the document when opened in Fourth Shift Report Viewer.
/save <outfile>	Used to save <filename> directly to the specified name and fully qualified path; if no <outfile> is specified, the Save As dialog box is displayed. This parameter can not be used with the /print, /text or /showopen parameters.
/print [/ask]	Used to print <filename> directly to the default printer set up for the workstation. If /ask is specified, the Print dialog box is displayed, allowing a choice of printers and other options. This parameter can not be used with the /save, /text, or /showopen parameters.
/text <outfile>	Used to convert <filename> to a plain text, comma-delimited file with the specified name. If no <outfile> is specified, the Save As dialog box is displayed. This parameter can not be used with the /save, /print, or /showopen parameters.
/showopen	Used to display the Open dialog box. This parameter can not be used with the /save, /print, or /text parameters.

In the following example, Fourth Shift Report Viewer is used to print a saved batch process report to the default printer after it is generated:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE  M:\MFGSYS\PORR01.PUR  /PRINT
```

Report Templates

Many Fourth Shift reports are generated using templates that define not only the data that appears on the reports, but the layout and formatting of the reports as well.

There are no differences in the actions you take to generate template-based screen reports or template-based batch process reports. However, template-based reports provide you with additional options for generating customized output, or multiple outputs of a single report.

Screen reports and batch process reports that are not generated using a template are generated instead as RTF (Rich Text Format) based documents.

Note: The templates used to generate these reports can be customized to change the layout of the report, or even the data contained in the report. For detailed instructions, see "Customizing Report Templates" in the *System Administration* manual.

Choosing Report Formats

When you use template-based reports, you can export reports to files in different formats such as PDF and CDF (Comma Delimited File). These files can then be viewed at a later time or used as input for processing by custom applications or distributed via email.

Printing External Documents

Fourth Shift generates a number of documents that are either distributed to your trading partners, or used to conduct business transactions with your trading partners. Many are designed to be printed on preprinted forms, although you can customize the templates used to generate the documents and print instead on plain paper. Or you can choose to email the reports automatically.

External documents are produced in a variety of ways. For example:

- Customer order acknowledgments, purchase orders and shipping documents are generated as screen reports.

- Invoices, order acknowledgements, and customer statements are generated as batch process reports.

- Checks and 1099 forms are generated as the result of screen processing.

For lists and samples of the external documents produced by Fourth Shift, see "Documents that Use Preprinted Forms" in the *Getting Started* manual.

Printing on Preprinted Forms

You may choose to print external documents, such as bills of lading, invoices and checks, on preprinted forms. If you are using preprinted forms, most of these documents offer alignment tests as part of the printing process. Use the alignment test before beginning a print run to ensure that the preprinted paper forms are correctly loaded in the printer.

Note: You are not required to use preprinted forms. Optionally, you can customize the report template used for printing external documents, and print them on plain paper using a laser printer. For more information on customizing report templates, see "Customizing Report Templates" in the *System Administration* manual.