Navigation Guide

PowerSchool BusinessPLUS

Contents

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Document Change Log
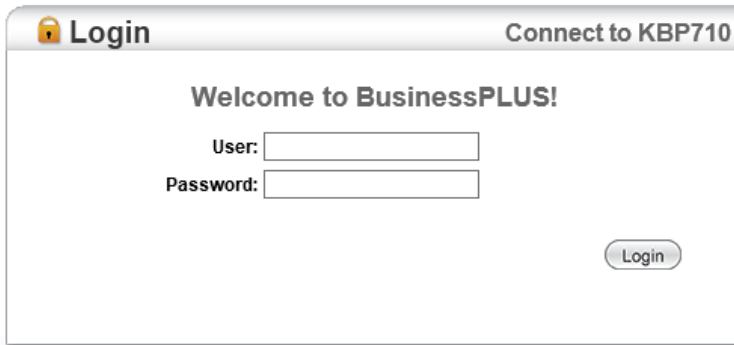
- Send comments or corrections concerning this guide to bpdoc@powerschool.com.

- Document all changes made to this document since initial distribution.

Date	Version	Name	Change Description
4/14/16	7.9.10.101	Patricia Kesel	Clarified use of the Find Extended feature as the best option for searching for Org Key or Object Code information within pages that focus on account information, such as the GL Budget Update Annual (GLBUUP) page.
5/25/16	7.9	Chris Villela, Patricia Kesel	Field Help - Added documentation on how to access and add notes to Field Help.
5/25/16	7.9	Patricia Kesel	Note that the default Record Limit is typically 500. Increasing the limit will impact performance. The higher the count, the more noticeable the performance impact.
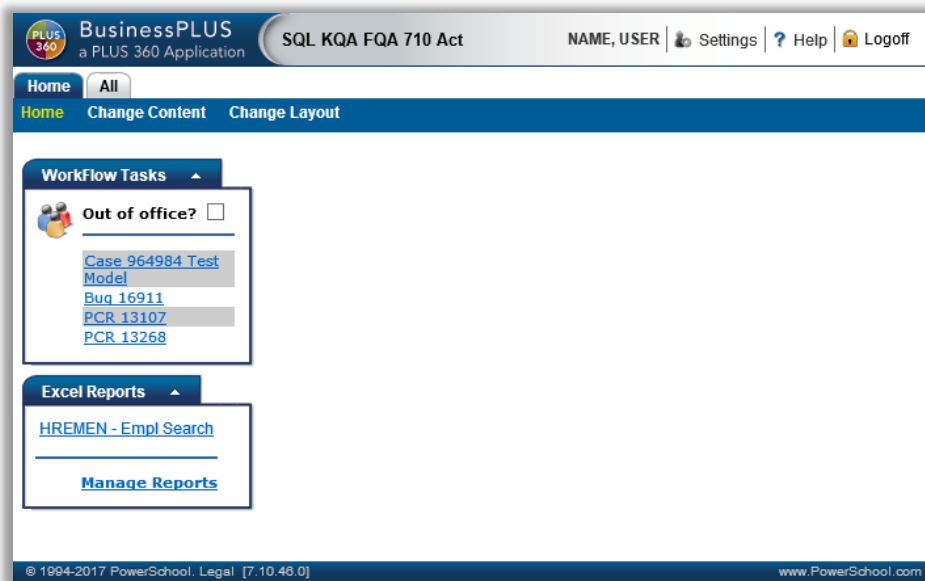
Accessing the BusinessPLUS Application

The following steps describe how to access the BusinessPLUS financial accounting system application:

1. In your Internet browser, enter the BusinessPLUS URL provided by your system administrator and press Enter. The Connect to <name> login page is displayed.

2. Enter the appropriate BusinessPLUS User (ID) and password, and then press Enter. The BusinessPLUS Dashboard (main window) is displayed.

The BusinessPLUS Dashboard displays main components for use and navigation:

*   The Dashboard Menu bar.
*   Settings.
*   Help.

Overview

BusinessPLUS Navigation can be split into two sections:

1. Navigation at the Dashboard level.

2. Navigation at the individual BusinessPLUS page (menu mask) level.

Menu Options

Both the Dashboard and the individual BusinessPLUS pages display the same "Settings" and "Help" options, as well as an Options icon/drop-down. However, the options for each menu are different in the Dashboard than they are for the individual BusinessPLUS pages.

Dashboard menu options:
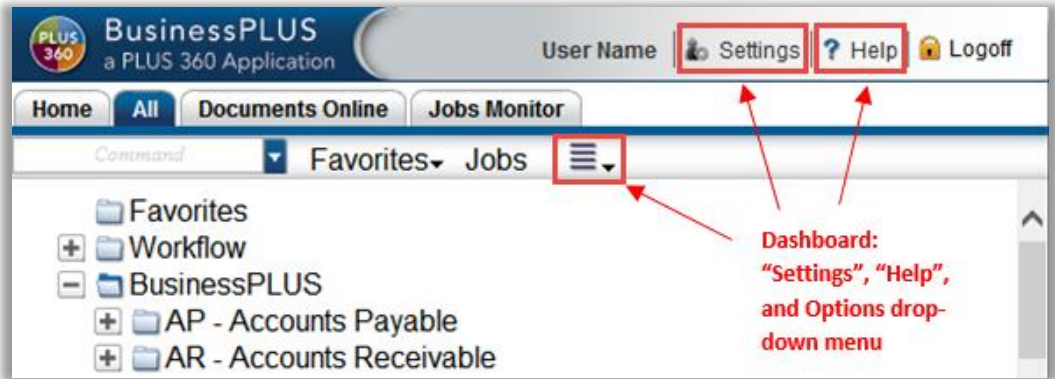
BusinessPLUS page menu options:
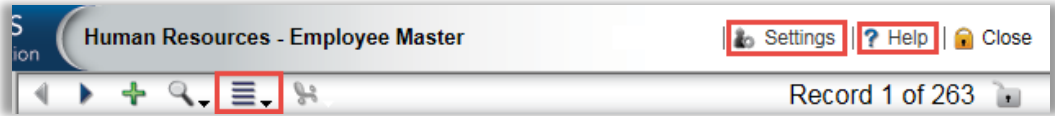
BusinessPLUS Dashboard Navigation

Navigation on the Dashboard is possible using the following components:

- Dashboard menu bar

- Command window

- Menu tree
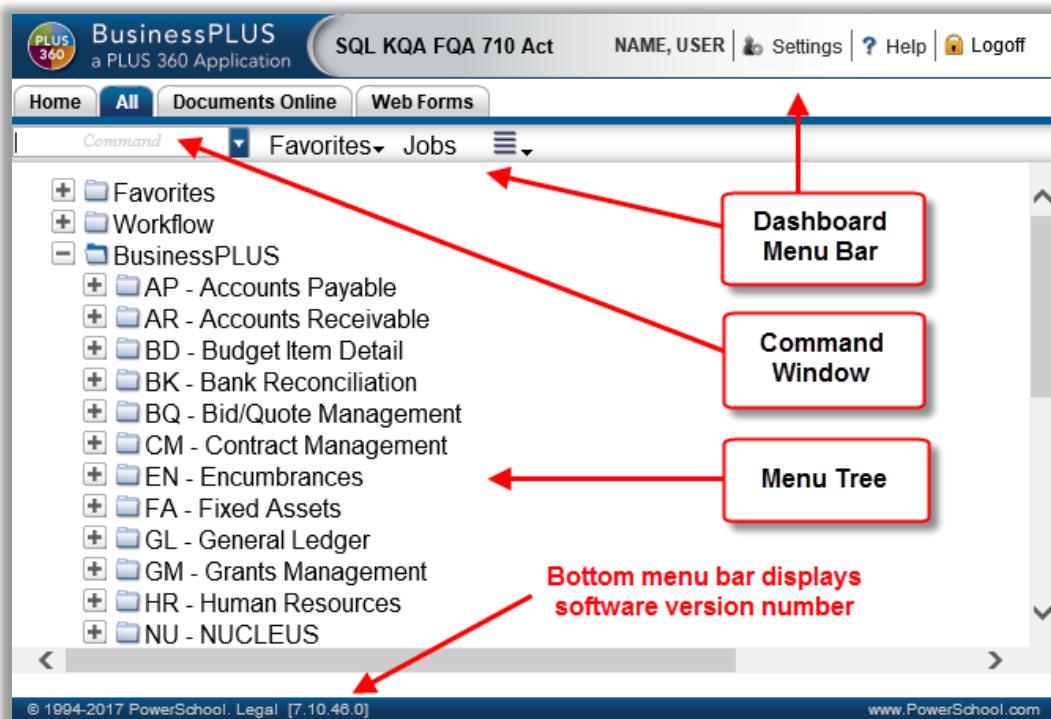
Dashboard Menu Bars

The Dashboard Menu bars include the following options:

- Favorites

- Jobs

- Options

- Settings

- Help

- Logoff

Favorites

The Favorites option allows the user to add pages or jobs to the Favorites folder, on the main menu, which can then be opened with a single click.
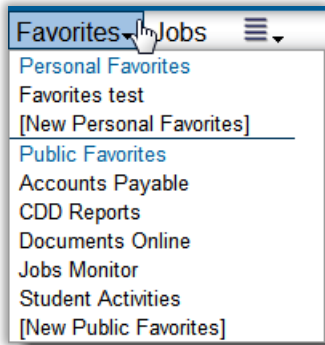
The Favorites Menu option displays the following sub menu options:

- **Personal Favorites**: Displays the pages and jobs that have been added to the folder.

- **[New Personal Favorites]**: Allows the user to add new pages or jobs to Personal Favorites.

- **Public Favorites**: Displays the pages and jobs that have been added to Public Favorites.

- **[New Public Favorites]**: Allows the user to add new pages or jobs to Public Favorites.

Jobs

The Jobs Menu option allows the user to see the status of current jobs, reports, and tools being processed. The following Show Jobs page is displayed when the user clicks on the Jobs menu option.
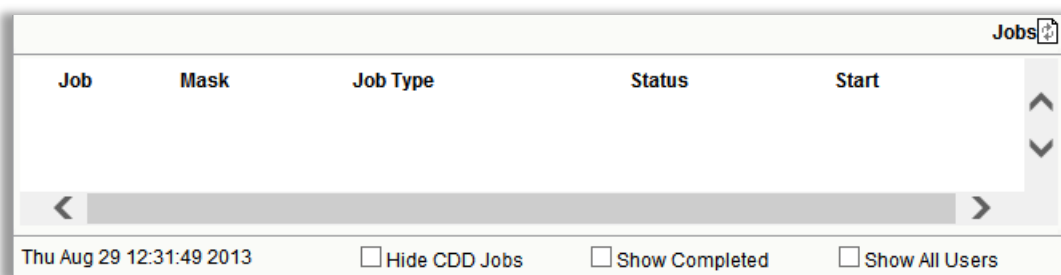
BusinessPLUS Jobs represent work that is being done on a user's behalf by the software server or the application server. There are several types of jobs, which are all tracked in the same location and consolidated on the same Jobs List.

The possible job types are listed below.

- **Workflow** – Jobs processed by the Workflow engine which may be submitted from multiple areas of BusinessPLUS.

- **Classic Job** – Jobs processed by the application server, submitted either through the Home page, the Dashboard, or a classic session.

- **CDD Report** – Reports run from CDD installed on a client PC.

- **CDD 7i Report** – Standard BusinessPLUS reports.

- **Tool Execution** – Tools requested from the options bar on a BusinessPLUS page.

The BusinessPLUS Jobs page displays the unique BusinessPLUS job number, the mask used to request the job, the type of job, its current status, the start/end times, and the requesting user. In the case of CDD reports that are still available for viewing, a link to the report output will also be provided.

The page refreshes periodically to display the latest job updates. There is also a Refresh button near the upper right corner of the page, to force an immediate refresh of the job status information.

Initially the jobs page will show current and pending job activity for the current user.

If the "Show Completed" option is selected, recently completed jobs will also be shown.

The NU Common Codes Category/Value of NUJB/SHOW may be defined for setting the number of hours to show jobs in the list. See the Common Codes Reference Manual for details.

Job	Mask	Job Type	Status	Start	End	User	Jobs
179019	JOB	Workflow	Workflow Queue			BRENDA	
179017	BQUTCP	Workflow	Completed	2:28:03 PM	2:29:06 PM	JAN	
BQUTCP Bids1 Report							
179016	APOHAPDS	Classic Job	Failed	11:26:54 AM	11:26:55 AM	PATTI	
STDLIST Tail Sheet							
179013	BQUTCP	Workflow	Failed	2:07:43 PM	2:08:46 PM	JAN	

Thu Aug 29 12:34:19 2013   ☐ Hide CDD Jobs   ☑ Show Completed   ☑ Show All Users

If the "Show All Users" option is selected, jobs submitted by all users will be shown.

Clicking the BusinessPLUS Job number will display the tail sheet output for the job, if available. The tail sheet is a quick summary of the job request and its results.

Typically, this information is stored in the Documents Online system. Here is a sample for Workflow Output:

```
Tailsheet for Workflow Output
 Job Number: 179017
        User: JAN

Output
Starting Tailsheet, 8/29/2013 2:28:03 PM
Starting Bids1 version:79.8.801.11 8/29/2013 11:28:05 AM
                        Mask : BQUTCP
                    GLLedger : FA
                    JLLedger : PR
------------------------------ * ------------------------------
                  Bid Number : BN0002
LP Copies, Name, Pri, & Option : 01WORKFLOW08
                   JobNumber : 179017
Debug is ON
Begin bids1 179017
 ended, 8/29/2013 2:29:05 PM, duration 00:01:02
```
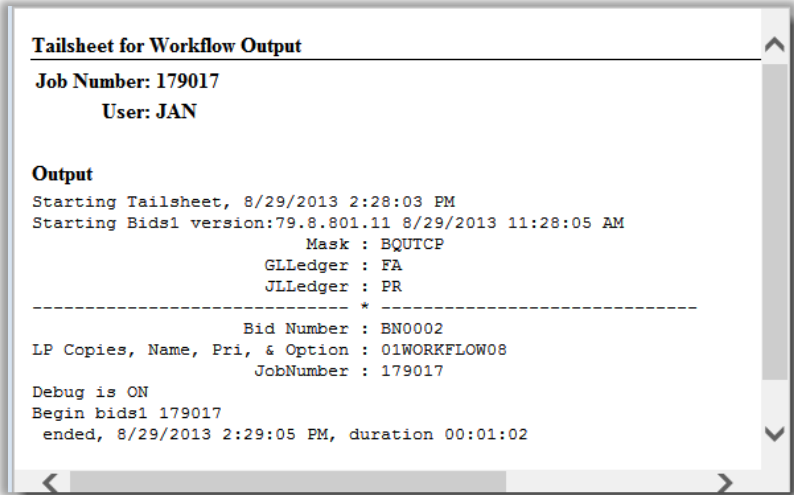
Options

The Options menu at the dashboard level displays the Change Password option.
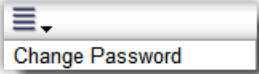
To change a password, select the Change Password option.

The Change password dialog box is displayed.
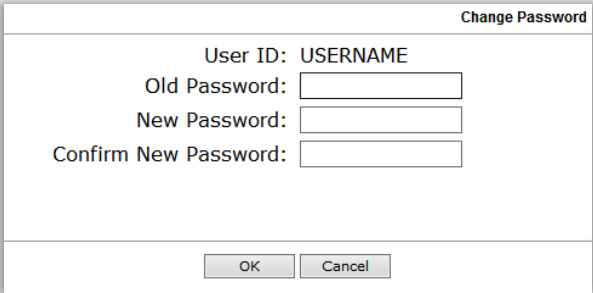
Enter the old password and the new password in the fields displayed, and click OK.

Settings

The Settings option on the dashboard displays sub menu options specific to the dashboard level.
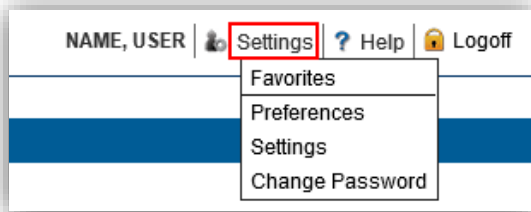
The Dashboard Settings drop-down displays the options that are global in nature:

- Favorites – Shows the Favorites that are activated in Preferences.

- Preferences.

- Settings.

- Change Password.

Preferences

This window displays the Dashboard Favorites that have been defined. A checkmark will designate which of the Favorites will be available for use on the Dashboard.
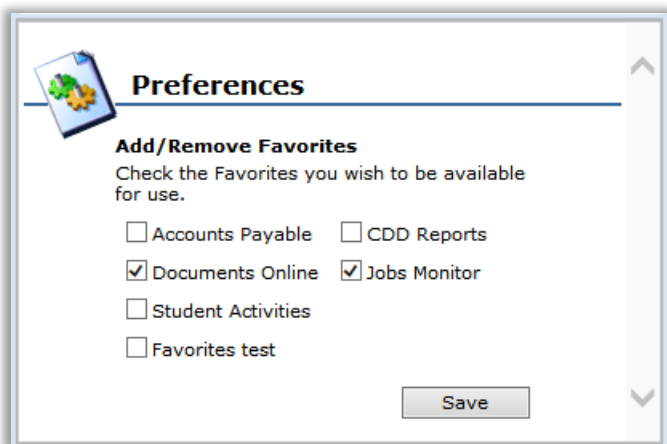
Settings (GL/JL Ledgers)

The Settings option at the Dashboard level, displays the active default GL Ledger and JL Ledger and a drop-down list to change the default.

GL Ledger: Displays the General Ledger codes derived from the GL General Information (GLUPGN) page.

JL Ledger: Displays the Job Ledger codes that can be selected.
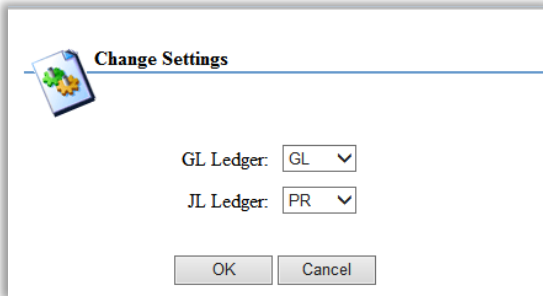
Change Password

The Change password dialog box is displayed.

Help

The Help option at the dashboard level displays the following submenu options:

- About.
- Navigation Guide.
- Give Feedback.

About

To display the details about the BusinessPLUS application, select the **About** option.

A Web page dialog box is displayed with details regarding the current Browser and version, BusinessPLUS software version and User Login ID.
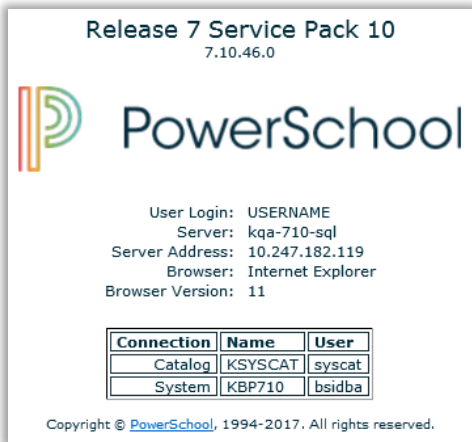
Navigation Guide

Select **Navigation Guide** to open a copy of this guide.

Give Feedback (UserVoice)

Give (BusinessPLUS) Feedback is done via third party integration with UserVoice and allows users to submit enhancement requests, view requests that others have submitted, and vote on the best ideas. For complete information regarding use and setup of this option, visit the Customer Support Portal, under **Support Downloads > Documents Downloads > Manuals > BusinessPLUS > User Manuals > 7.9 > UserVoice~Give Feedback Setup in BusinessPLUS**.
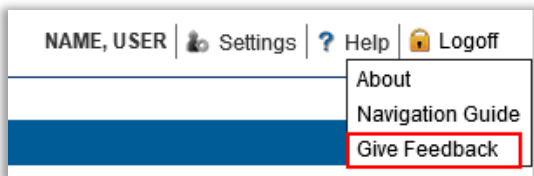
Logoff

To log out from the application select **Logoff**.
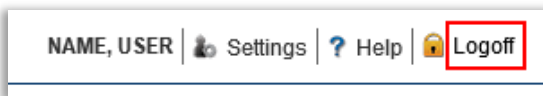
The following page is displayed.
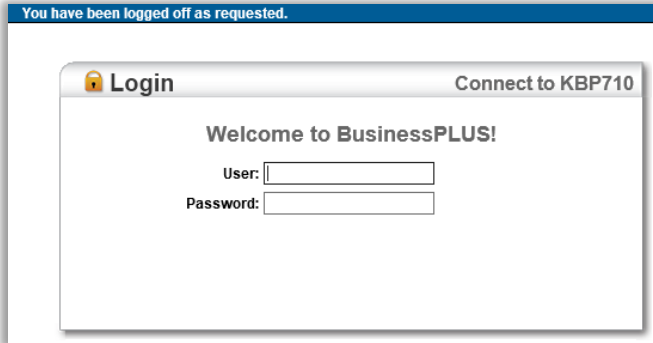
Menu Tree

The BusinessPLUS application is comprised of a number of subsystems, data entry, and data retrieval pages. The data entry and data retrieval pages display a number of fields which either allow you to enter data or retrieve the required data. These pages can be used for viewing the information in the system or to enter new information.

Pages can be accessed using the Command window or the Menu tree on the BusinessPLUS Dashboard.

Expand the menu tree to display the different pages and functions. Select the "+" signs next to the folder name to view available pages or functions.

To open a specific page or function, on the Menu Tree, double-click the function name or the page icon.
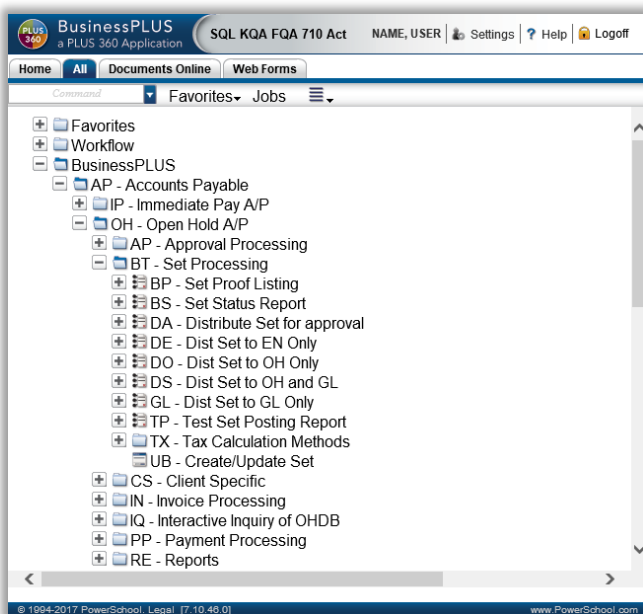
Command Window

BusinessPLUS pages can be accessed directly from the Command Window. In the Command Window, type the menu mask name of the page or function and press **Enter**.
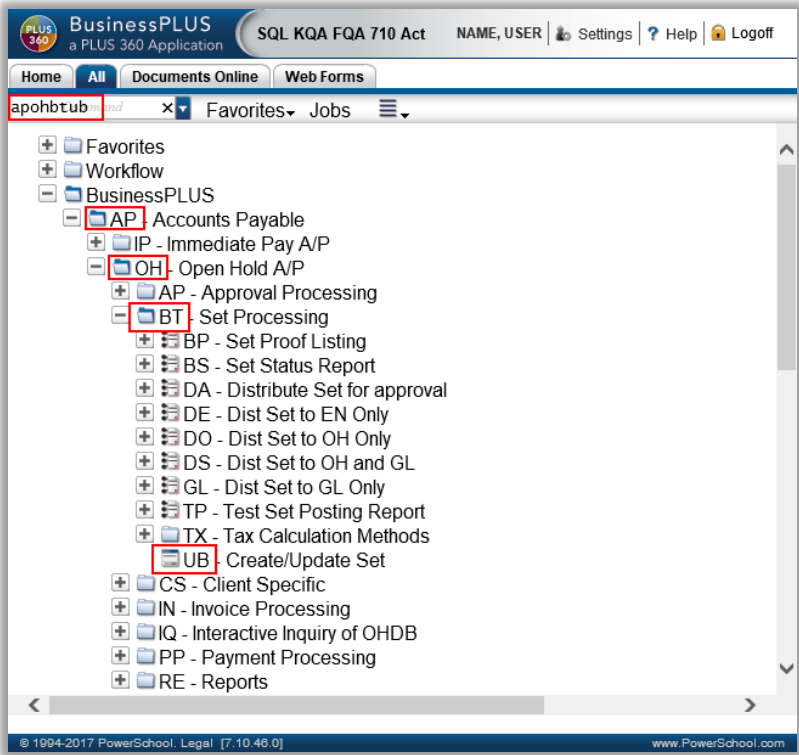
BusinessPLUS Page Navigation

Each BusinessPLUS page has three areas that provide additional information or functionality.

The top menu bar, referred to here as Page Global Menu bar, is similar to the dashboard, but includes an added layer of options and settings that are relevant to page functionality

The Page Specific Menu bar displays options and functionality relevant to the specific page. Icons will appear on the page when they are functional.

The Side Menu Options will appear on every page but only the tab with an icon to the left of the tab name will provide added functionality. In this example, the Links tab has a yellow link displaying, the Tools tab has a red toolbox – these are indicators that additional functionality is available. Click on these tabs and the functionality will be displayed. What that functionality is will vary by page.
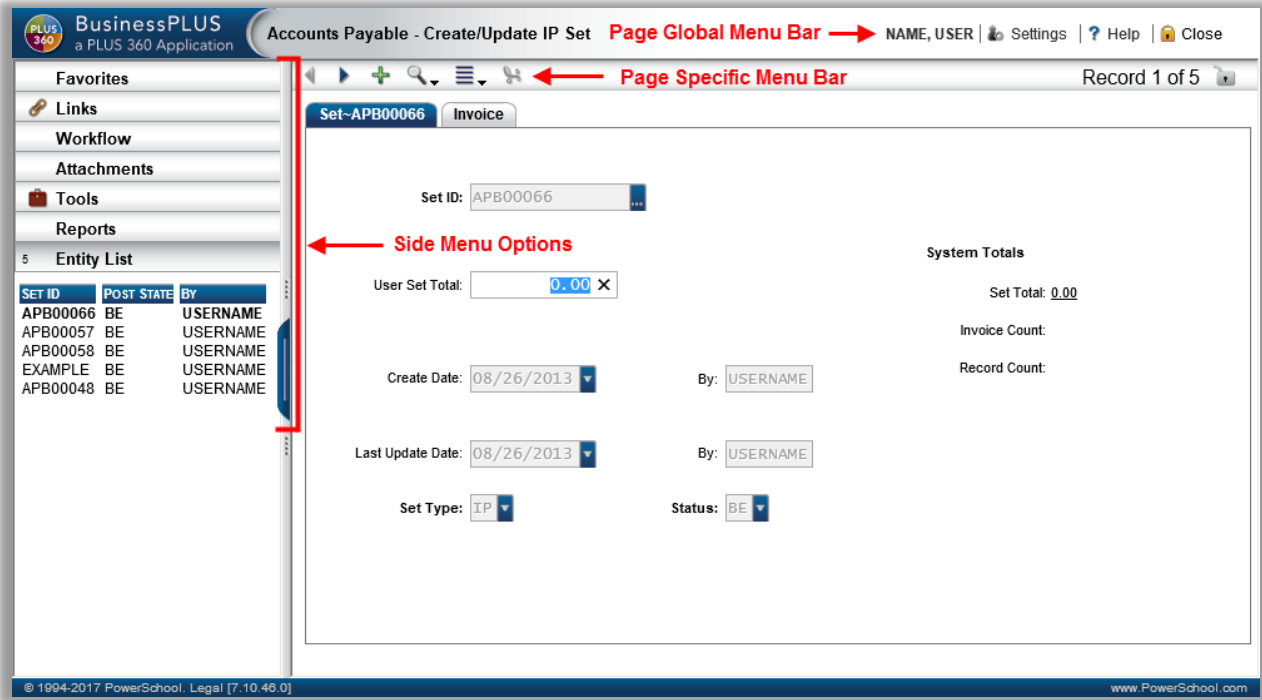
Settings

Click on Settings to display the available options at the page level. At the dashboard level, changing the ledgers is the only option enabled. At the page level, settings for preferences in how the pages function are available as well.
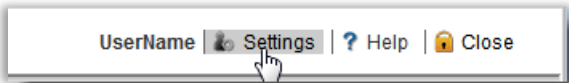
Ledgers Tab

The Ledgers tab allows the user to change the ledger preferences from those that default from global settings (Dashboard Settings) or those designated in Nucleus User Information (NUUPUS), unless ledger restrictions are set in BusinessPLUS security.
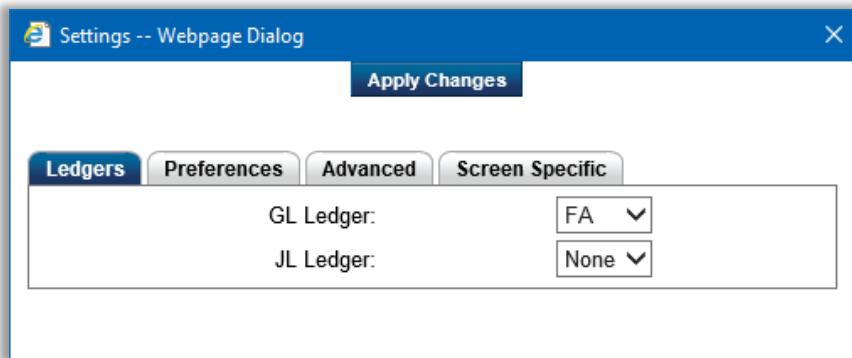
Preferences Tab

The Preferences page allows the user to set the preferences for the BusinessPLUS application.
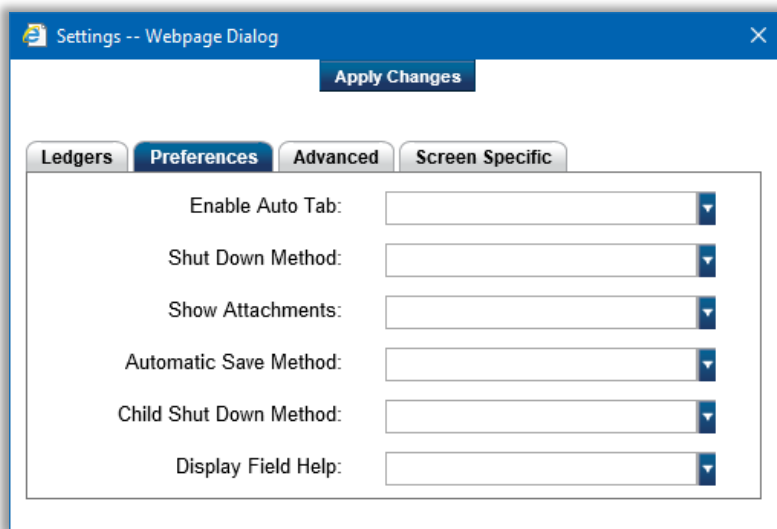
The following table describes the Field names and the drop-down list options displayed on the Preferences page.

Field Name	Drop-down List Options	
Enable Auto Tab	Enable Auto tab Disable auto tab	Allows the user to tab from field to field in the default manner. When auto tab is enabled and currently active field is completely filled out, the cursor automatically goes to next field

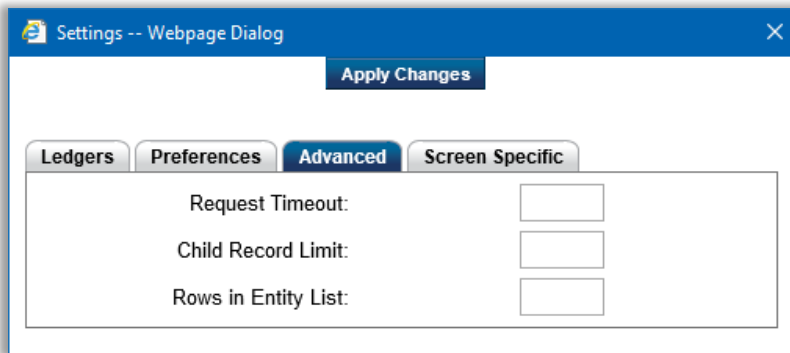|		
		without the user having to use the tab key. Default value is "Disable".
Shut Down Method	Do not save changes Warn on changes Save changes	The selected mode of shut down applies to the entire system and can be set from any page. The last setting change is always used. A refresh of the menu tab will show the current value. Default is "Do not save changes".
Show Attachments	Never Upon request Always	Allows the user to set whether attachments are always shown, shown upon request, or never shown. Default is "never" show attachments.
Automatic Save Method	Do not save changes when navigating Warn on changes when navigating Save changes when navigating	Allows the user to select different Save options. If Automatic Save is set to "Warn", when moving from one item row in the grid to another item row and there has been a change on the original row, the user should receive a warning asking whether they would like to save your changes. Note: When in grid mode moving the focus from one row to another is considered a "navigation". In some instances, like the POUPPR page, the moving focus from a grid row to one of the non-grid fields is not a navigation because the original grid row is still the current grid row. Grids do not support batch changes, that is to say changes to a row must be saved before moving to another row. Default is to "Save changes when navigating".
Child Shut Down Method	Do not close Child Screens when closing Insight Explorer Close Child Page when closing Insight Explorer	Allows the user to control the shutdown of Explorer windows. Default is "Do not close Child Screens when closing Insight Explorer".
Display Field Help	Yes or No	Allows the Field Help to display.

Advanced Tab

The Advanced tab displays options to set the Request Timeout, Child Record Limit, and the Rows in Entity list.

Field Name	Description
Request Timeout:	The timeout value is the amount of time the system has to retrieve information before it enters "timeout" mode. Use this option to define a timeout value (in seconds) greater than the default, which is 30 seconds.
Child Record Limit	Allows the user to set the number of child records that may be opened at one time. This will help avoid system overload that can occur while opening many child records at the same time. The default limit is 500. Increasing the record limit above 500 will begin to impact performance. The higher the number, the more of an impact.
Rows in Entity List	Allows the user to set the number of rows displayed in the page's Entity List.

Screen (Page) Specific tab

The Screen (Page) Specific tab enables the user to modify the options on the active page.

| Field Name	Description
Initial Screen Mode:	Enables the user to open the page in browse mode, showing all open records, by selecting "Initially normal"; in select mode by selecting "Initially in Find Mode". Opening the page in Find mode will cause it to display faster as no records are displayed until the user performs their QBE; or, open the page "Initially in Add' mode.
Initial Filter:	Enables the user to set the Initial Filter for the page.
Always Filter:	Enables the user to set filter for the page always.
Workflow Task List:	Allows the user to enable or disable the Workflow task list.
Local Printers:	The drop-down lists the printers defined on the user's PC. The printer selected from the list (and "Apply Changes" is clicked) designates the printer that will be used when interactive printing is an option from within the page. For example, cash receipts via ARBTCRIC, the "Interactive Cash Receipts" page.
	Note: Pages that are able to print to a local printer, such as CDD or Interactive Cash Receipts, require a special PowerSchool print control that is downloaded one time (typically, when the user first enters one of these pages).
	Note: It will say "Not applicable." if the user clicked "No" when prompted to download the "PowerSchool Printing Control" upon bringing up the Interactive Cash Receipts page for the first time (if the user is not getting prompted and "Not applicable" still shows, Internet Explorer's security settings may be too tight). For further details on the "PowerSchool Printing

	Control" and Internet Explorer's security settings, search for "btieprnt" and/or "local printers" within the online Support Portal.
QBE Lookups:	Allows the user to enable or disable the QBE (Query Based Example) Lookups.

Help

Help from the main dashboard menu bar will invoke this Navigation Guide. Help options at the page level will include help specific to the active page.
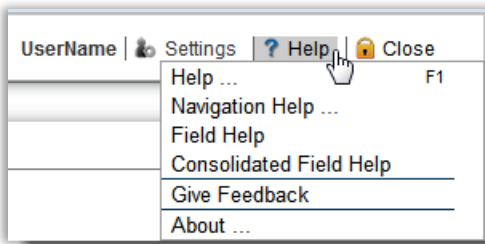
Help
To display online help for the active page, select the Help option or press F1.

Navigation Help…
Opens the Navigation Guide. This is a quick link to the document presently open.
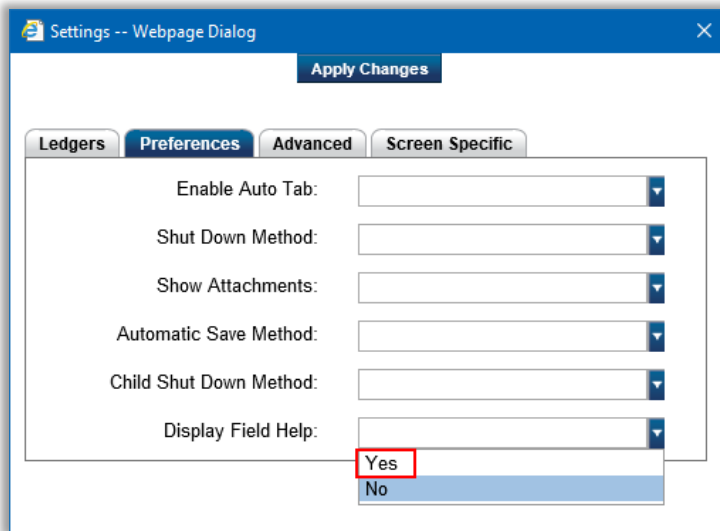
Field Help
To display information regarding the corresponding Table, Column, and Type of field, or add public notes, select Field Help and a section will display at the bottom of the page. When Field Help is active, Table, Column and Type content will update to display information specific to the field holding the cursor. The Type field also typically holds a number in brackets that represents the size of the field, but this number may be able to be overridden by common codes or content set up. For example, an object code may be up to 10 characters but GLUPOB supersedes this definition.

Field Help


Displaying Field Help: Intermittently or Consistently

When Field Help is activated via the Help icon, the field will display temporarily. After closing and re-opening the page, the user will need to activate Field Help again to display if desired. To always show Field Help, open Settings from any page's menu bar. Navigate to the Preferences tab and update Display Field Help to "Yes".

If Field Help is not displayed, go to Help and select Field Help.
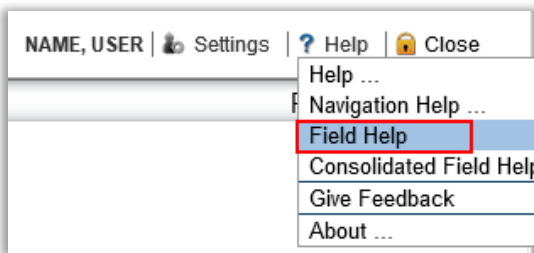
When Field Help has a ✔ next to it, the feature is turned on and should display. However, some pages are not directly associated to a particular table or tabs within a page will not display a reference to tables or columns. These fields are typically text, but not limited to text. When in doubt, review the page's Consolidated Field Help, which is accessed from the Help icon on the page menu bar.

Custom Field Help: Adding Public Notes

Click on a field to see more information about it.

The user can customize Field Help by selecting the pencil icon, which will bring up a pop-up box where help text for that field can be added.
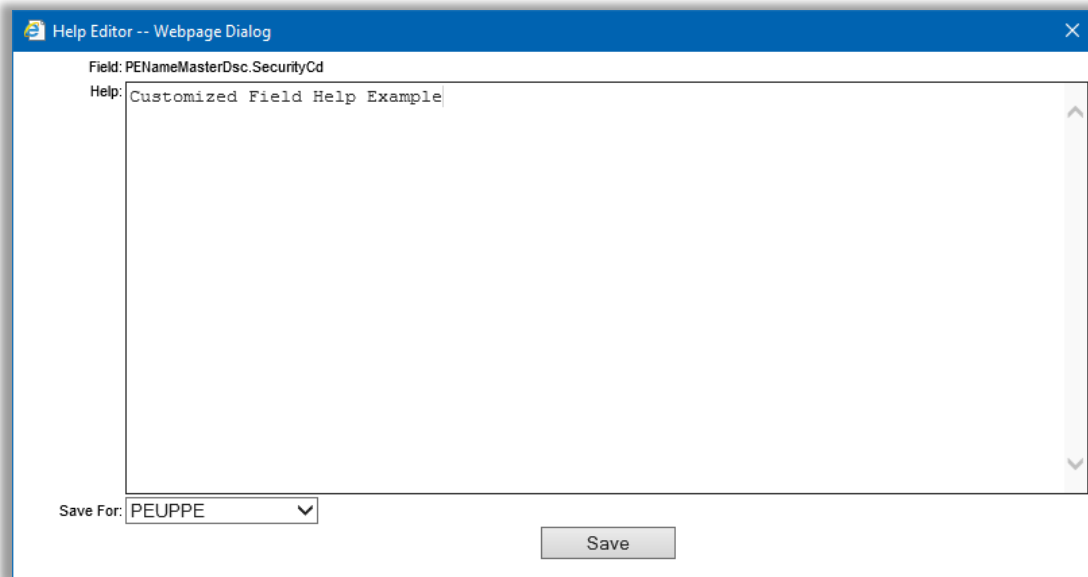
Click Save when done.   Now it will show your custom text.

Field Help will show for all users who have access to the page.

Field Help Security

For Field Help a new node ("Allow Editing of Field Help") was added in the Security Structure which requires rebuilding security on the client machine. Close the Manage Security Structure window for changes to take effect and then flush the cache.

Field Help uses a new table "NU_COL_INFO" that allows users to read / write to the Field Help using that table.
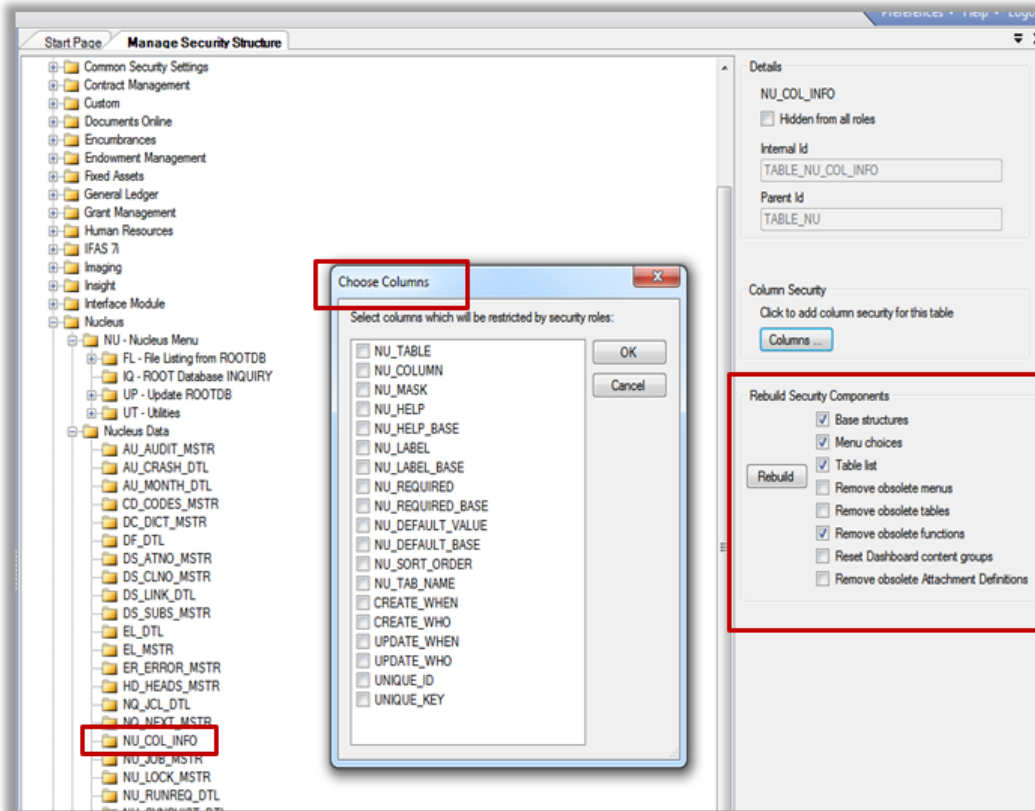
Consolidated Field Help

To display the information for all the fields on a page, select this option. Notice that the Table and Column columns include content found within Field Help for the given field (Property column). This information is useful for developing reports. Create an Excel version by clicking Export to Excel.

Label	Table	Column	Type	Size	Help	BT20Object	Property	Customized?
	ohh_batch_mstr	oh_batch_id	char	16		BT20.OHHBatchMaster	BatchId	No
	ohh_batch_mstr	ohh_user_total	numeric	20,2		BT20.OHHBatchMaster	UserTotal	No
	ohh_batch_mstr	ohh_create_date	datetime	19		BT20.OHHBatchMaster	CreateDate	No
	ohh_batch_mstr	ohh_create_user	char	12		BT20.OHHBatchMaster	CreateUser	No

BusinessPLUS Page Menu Bar
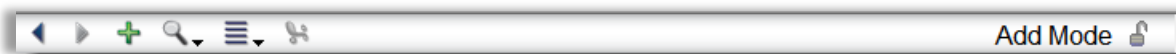
The Page Menu displays the following options:

PREVIOUS RECORD - Shortcut Key: CTRL+P

This button will display the previous record in the entity list. If the first record is displayed, the button will be disabled.

**NEXT RECORD - Shortcut Key: CTRL+N**

This button will display the next record in the entity list. If the last record is displayed, the button will be disabled.

ADD NEW RECORD - Shortcut Key: CTRL+A

This button will put the page in add mode to allow the user to enter a new record. When finished creating the new record, click on the Save button to insert it.

FIND RECORD - Shortcut Key: CTRL+F

The Find option displays a drop-down menu, which allows the user to perform different search functions.
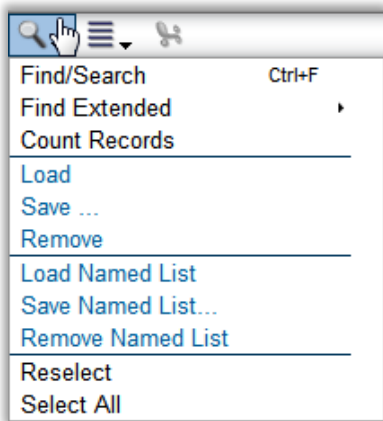
Find Menu Options

Find/Search

The Find/Search option allows the user to search for a record based on selected criteria. To initiate the inquiry, click the Find icon and select the Find/Search command (or press Ctrl+F).

Selecting the Find/Search option clears all searchable fields on the page and displays Query By Example (QBE) mode. Enter criteria in the fields on the page and then select Apply Search under the Find menu (or press Ctrl+F).

Selecting Sets of Criteria

Each "Find" definition can be made up of one or more sets of criteria used to determine which records in the database are to be returned by the inquiry. Use any field or

combination of fields for the inquiry by moving the cursor to the desired field and keying in the desired selections. The user may make more than one selection within a single field, separating values with commas. When making more than one selection from a combo box, choose multiple values from the list presented.

Apply Find Criteria

When the Page is in Find Mode, the Find option displays the following sub menu options.
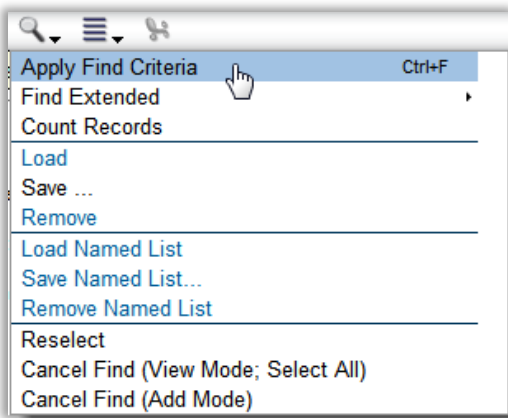
The Apply Find Criteria option allows the user to apply the Search criteria, and find the records as per the search criteria given.

General Standards for Selection Criteria

Enter selections in desired fields by following the general standards for selection criteria:

- To specify a range, use ":". For example: 123:321 becomes between "123" and "321" (including 123 and 321). For data types that are character, numeric, or date type, the same method can be followed. For data fields that are date/time data types there is a small difference. From a practical perspective, the user does not specify the time, so the system assumes the time of 12:00 AM for each date value entered. For example: 01/01/2013:01/31/2013 becomes between 01/01/2013 12:00:00 AM and 01/31/2013 12:00:00 AM, therefore the activity on 01/31/2013 is not included. To include all activity on 01/31/2013, the user should select 01/01/2013:02/01/2013.
- The "%" or "*" is used as the wildcard symbol. "ABC%" will return all records in which the specified field entry begins with ABC.
- The "?" or "_" is used as the wildcard symbol for one character. "AB?" will return all records in which the specified field length is 3 characters long and begins with "AB".
- To specify selections for a field, use the following syntax:

    >abc – greater than "abc"

    >=abc – greater than or equal to "abc"

    <abc – less than "abc"

<=abc – less than or equal to "abc"

<>abc – not equal to "abc"

a,b,c – **"a"** or **"b"** or **"c"**

a|b|c – **"a"** or **"b"** or **"c"**

= ab, cdef – to select text with commas

- If the user is entering selection criteria in the detail portion of a page, they can add the keyword "OUTER" to their selection criteria to indicate that they want to fetch all master records, even if they have no associated detail data. For instance, assume the detail portion of the page contains a "status" field, with the possible values of "A" and "I", meaning active and inactive, respectively. If the user wants to fetch only the master/detail data where there is an active detail record, they would enter "A" for their QBE. The problem here is that the query will not fetch records for which there is no detail information. If the user wants these records, they can enter "A,OUTER" for their QBE. This will fetch all master records that have Active details, or do not have any details at all (which in standard SQL is known as an "outer join").

Query Examples:

- When using the Check and Deposit Information page to select by Bank ID and by Document Number, position the cursor in the Bank ID field and enter the desired bank ID(s) or bank ID range. Then position the cursor in the Doc Number field and enter the desired document number(s) or document number range.

  After entering the criteria for the search, select Apply Selected Criteria on the Find menu (or press Ctrl+F) to finalize the definition and launch the inquiry.

  Using this example, the system was instructed to find all records where the bank ID and the document number that match the selections given or the range of selections given. The record(s) that match the criteria selected will now be available to browse by clicking Next and Previous.

- To select all bank IDs that begin with a letter greater than J and all document numbers beginning with 001, position the cursor in the Bank ID field and enter >J. Then position the cursor in the Doc Number field and enter 001%.

  The system will now go search the database for all records where the bank IDs are greater than "J" and the document numbers begin with "001".

Find Extended

Find Extended is an advanced search feature. Every page is equipped with the feature (accessed from the Find icon), yet the menu items that display vary depending on the content within the open page. So depending on how the page is organized, the user may see different menu items. Most pages will offer an extended search titled "Threaded

Notes," and within this menu is the "Select Record Type" drop-down list of additional sub-categories to filter the search. However, pages that organize data around account information may offer to search for Organization Key Information and Object Code Information. Examples of pages that are account driven are GL Budget Update Annual (GLBUUP), GL Direct Transaction Update (GLUTTR and GLUPTR), GL Browse Accumulators (GLUTAC), and others. Find Extended is the best search option for these pages.

To use Find Extended, click on the Find icon, "Find Extended" from any page's menu bar. Modify the menu details, click OK to see the dialog box close, then hit <ENTER>. Notice the page will then be in Find Mode. Records that match the search criteria will display.

Threaded Notes

Use the Find Extended option on a specific page displaying the Threaded Notes sub menu option.
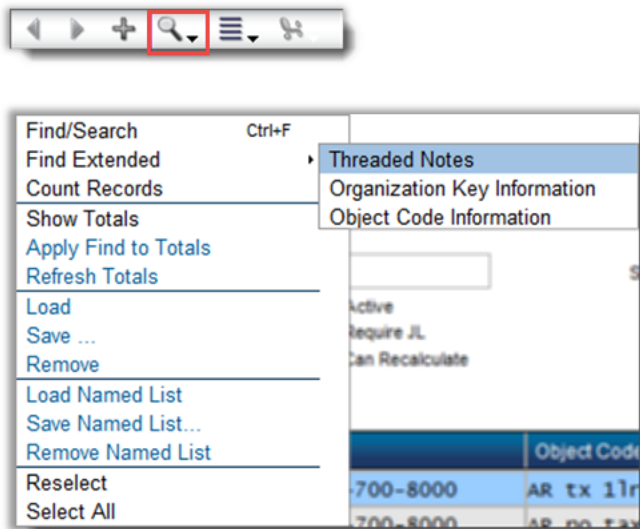
On selecting Threaded Notes, adjust the Select Record Type, add a search term, then check the box of the desired Search Item(s). Click OK and see the menu close. Hit <Enter>. The page will go into Find Mode and display items that match the search criteria.
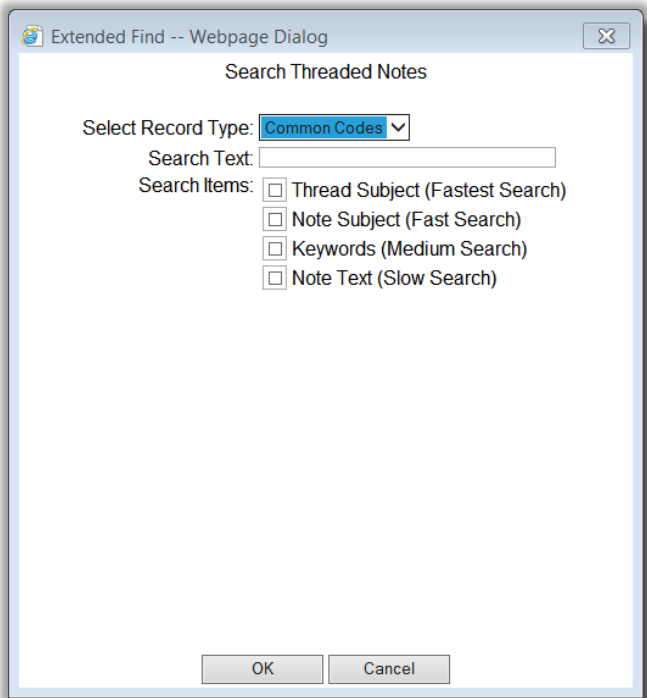
Organization Key / Object Code Information

Use the Find Extended option of a specific page displaying the Organization Key or Object Code Information options.
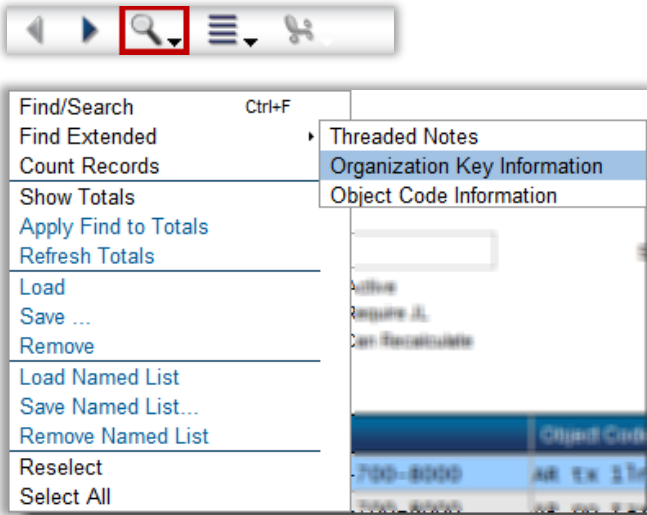

Search by Key

Add the desired search item(s), click OK, then press <ENTER>. These actions will put the page into Find Mode and return any records matching the criteria. Note that Status, Type,

and the many Miscellaneous Code fields will find details that the user types into those fields. Double-check the fields for accurate input before clicking OK to continue the search.
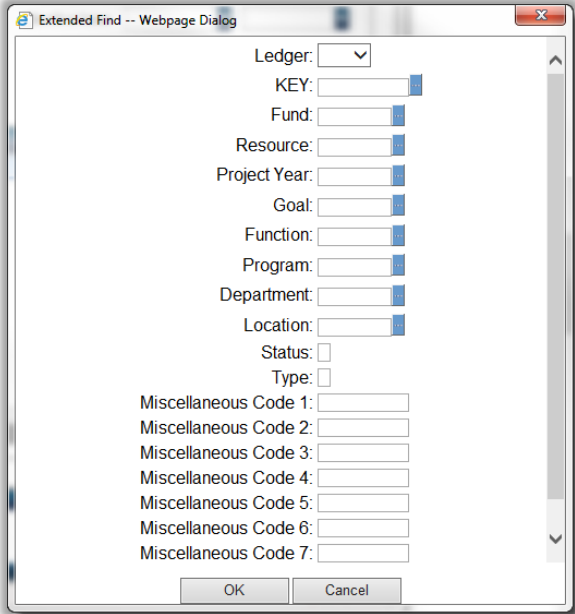
Search by Object

Advanced search for particular object content. Add the desired search item(s), click OK, then press <ENTER>. These actions will put the page in Find Mode and return any records matching the criteria. Note that Object Type, Balance Type, and Status will find details that the user types into the fields, so double-check the fields for accurate input before clicking OK to continue the search.
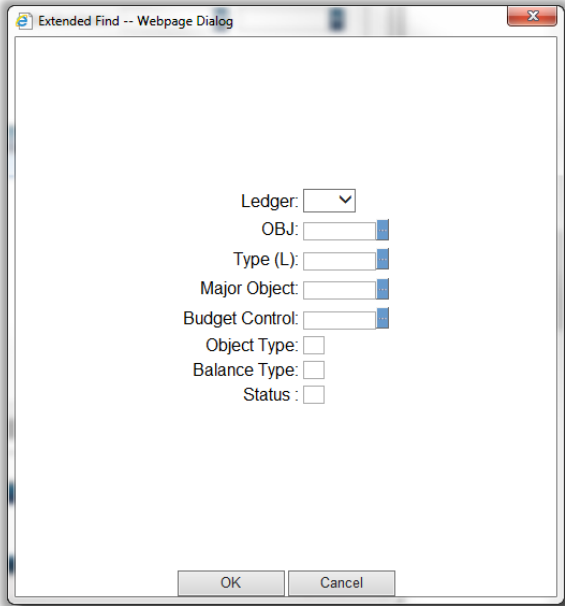
Count Records
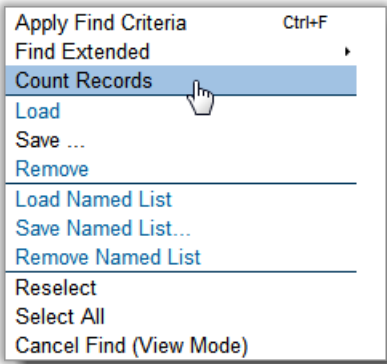
Reports the number of records currently selected.
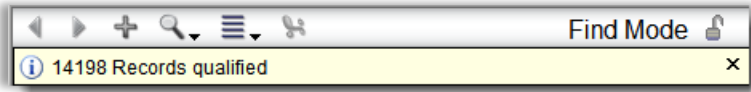
Show Totals

Some pages may support special totaling options. If Show Totals is selected, a totals box will be displayed and this option will have a check mark next to it. To hide the totals, select this option again and the check mark will be removed.
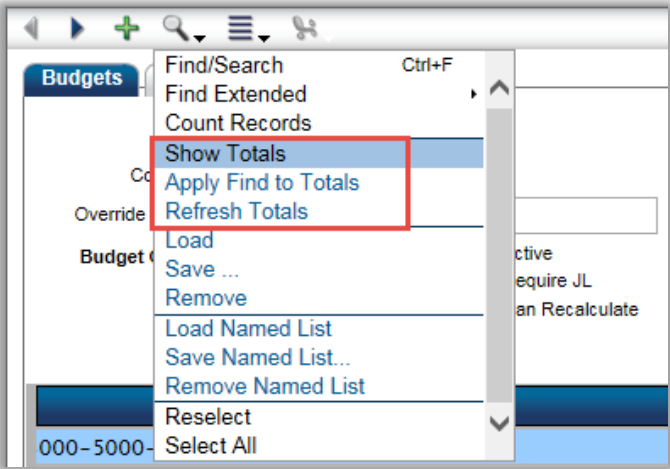
Apply Find to Totals

When checked, locks in a query to use for totaling (until it is unchecked).

Refresh Totals

Select at any time (while totals are shown) to update the totals.

Save

To reuse selection criteria, define the selection. The Save button on the menu becomes enabled. Save the selection before the Apply Find Criteria is executed.
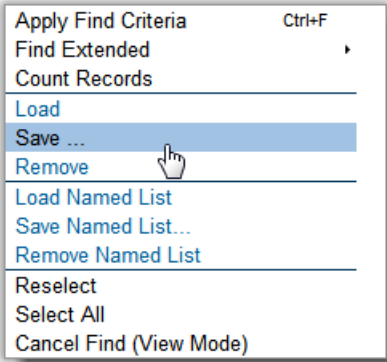
The dialog box (below) displays the option to enter a description of the Find definition that will appear in the Load menu.

Click OK after entering a description to save the Find definition.
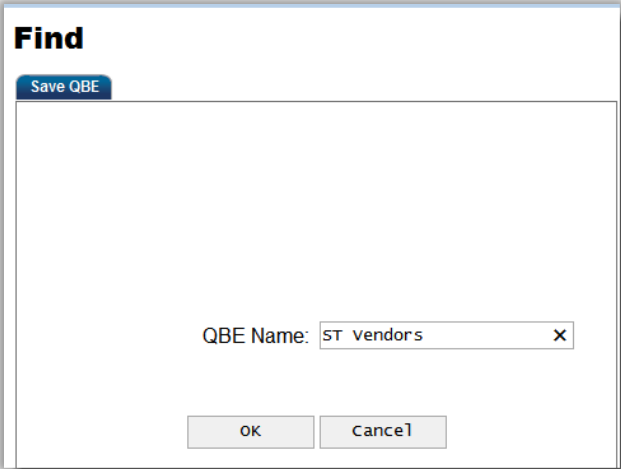
Load

When Load is selected, a dialog box is displayed if previous selection criteria definitions have been saved. Saved descriptions will be listed as options for Load name sub menu option. Click OK after a selection is chosen to load the Find definition.
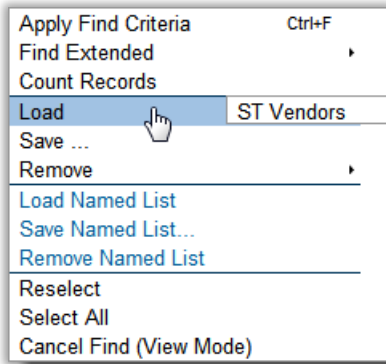
Remove

To remove the loaded Find definition, select Remove from the Find menu.
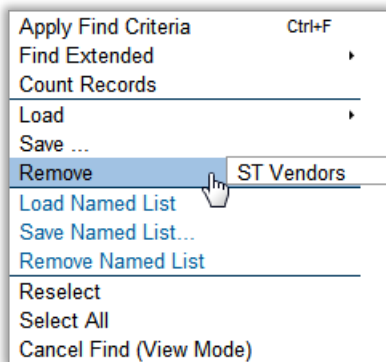
Save, Load, and Remove Named Lists

BusinessPLUS data entry pages have extensive search capabilities to find the information needed. It is also possible to save and reuse search result sets. For example, if a user is only working with a certain list of employees or professional development courses, that user could create a Named List that contains these and reuse this every time needed without having to re- search. It is possible to create multiple Named Lists per individual page.

The difference between Save and Save Named List is this:

- Save will save the search criteria and (when loaded) that search will apply the search criteria to all the records. In other words, when the underlying information changes, the search results can be different.
- Save Named List will save the entity list search results. In other words, even when the underlying data changes, the list will remain the same.

When No Named Lists Are Defined

When no Named List(s) have been created on a page, the Named List options in the Search drop-down in the navigation bar are disabled.

Save Named List

In order to create a Named List, perform a search on a page to retrieve the desired information. As soon as the page has returned the desired results, the option Save Named List is enabled in the Search drop-down in the navigation bar.
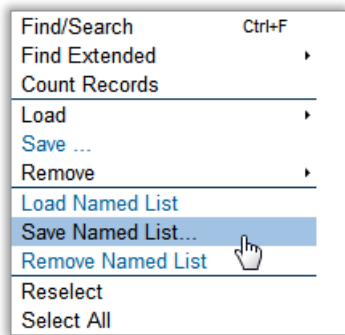
After selecting Save Named List, the following Save Entity dialog box appears:
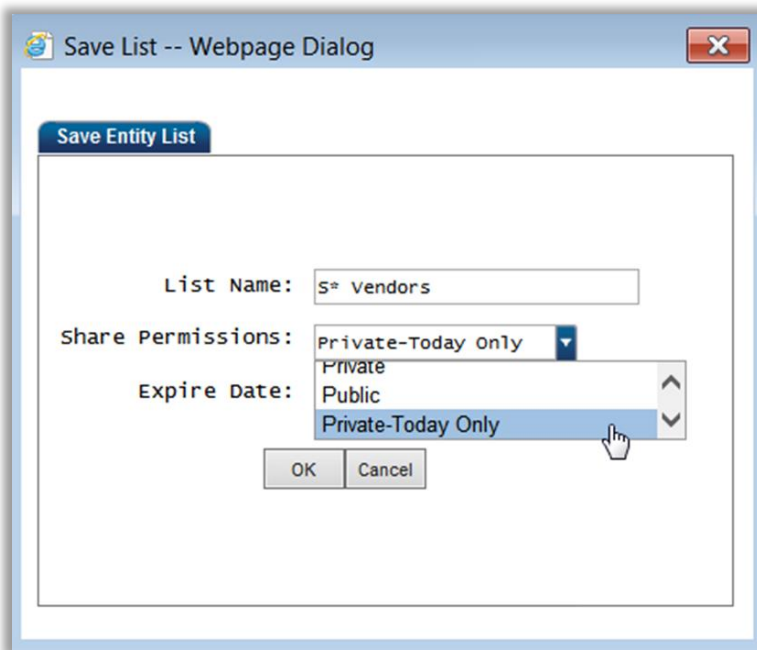
Enter a name for the search in the List Name field. This name will be used by the user to load or remove the named list.

In the Share Permissions drop-down, you can select the following three options:

1. Private: The Named List will only be available to the user that created this list.
2. Public: The Named List will be available to all BusinessPLUS users.

3. Private-Today Only: The Named List is temporary and will only be available to the user that created this list, and is automatically removed after today.

For options 1 and 2 it is required to specify a date on which the name list will expire in the Expire Date field (i.e., not display anymore in the page). When option 3 is selected, the Expire Date is automatically set to today's date.

List Name, Share Permissions, and Expire Date are required fields.

It is possible to create multiple Named Lists for a specific page.

Load Named List

After having created one or multiple Named List(s), all Named List options are available in the Search drop-down in the navigation bar.
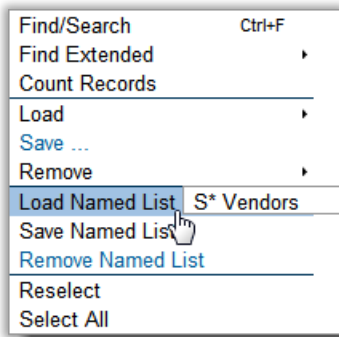
In order to load a Named List select the Load Named List option and select the desired list to use. After clicking on the desired list, the defined entity list is automatically displayed.

Remove Named List

After having created one or multiple Named List(s), all Named List options are available in the Search drop-down in the navigation bar.

In order to remove a Named List select the Remove Named List option and select the desired list to remove. After clicking on the list to remove, the list is immediately removed from the Named List. When no Named List(s) remain, all Named List options will display disabled again.

A public Named List can only be deleted by the user who created that public Named List.

Reselect

To return to the most recently loaded Find definition, select Reselect from the Find menu.

Cancel Find / Select All

When the user has loaded a Find/Search, they may return to the unfiltered database by choosing Select All from the Find menu. The QBE functionality leaves the user in Find Mode if the query is unsuccessful.

The Escape (Esc) key is a quick way out of Find Mode. If the query returned no rows, pressing Escape will put the user into Add Mode. If they want to cancel a Find before doing a query, Escape will put the user back into Browse Mode on the record they were on last.

Cancel Find (Add Mode)

Aborts the current Find and returns the page to the Add Mode identified.

Page Options Menu
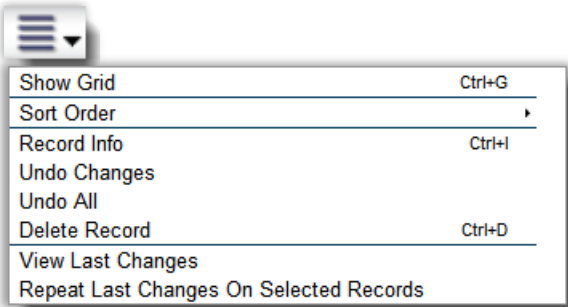
Show Grid

Show Grid (Ctrl+G) or Hide Grid (Ctrl+G).

Toggle to and from grid mode and single record view mode.

The Show Grid option allows you to view the field grids for the selected page.
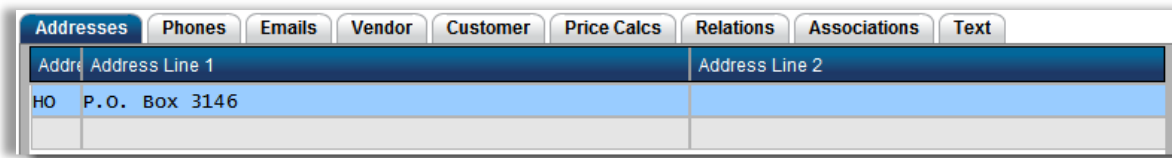
Personalize the grid by changing the field size or changing the field order. These changes will be unique to each user.

Restore Default Grid Settings

The Restore Default Grid Settings option will reverse changes made to the user's grid view.
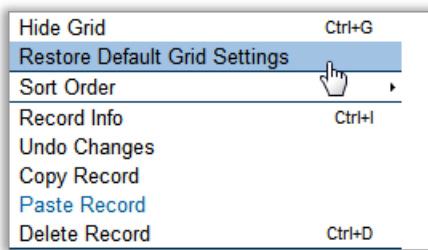
Sort Order

This drop-down menu enables you to select the display order of the records on the Entity List. The Sort Order options vary by page.
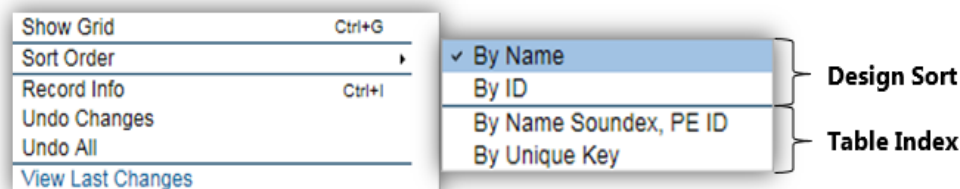
 There are two types of sort order:
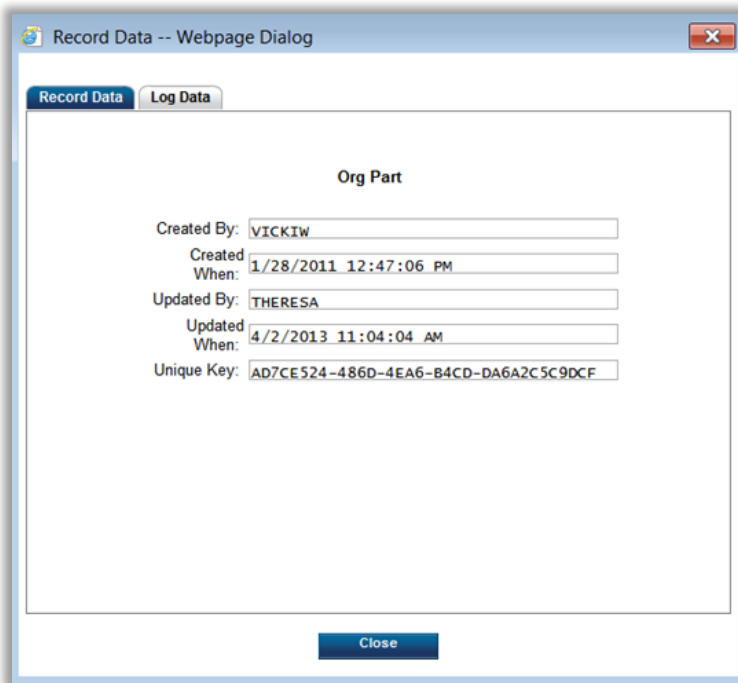
1.   Design Sort (Customized by Development)

2.   Table Index (Database)

The sorting entries will be separated by a dividing line unless there is only one type of sort. If only one sort is available, it means that it comes from the index table in the database and development has not added a sort for the selected BusinessPLUS page.

Record Info

Select the Record Info option to display the Record Data dialog box.

This pop-up has two tabs. The first tab, Record Data, shows properties on the record that might not show on the page: Created By, Created When, Update By, Updated When, and the Unique Key identifier for the record. If the underlying page is in QBE mode then the Record Data tab can be used to add QBE values.

The Log Data tab provides a view of the change history for the record. Logging is set up via the Admin Console tool. Logging causes a record of changes to be saved for selected columns within a table. For more information about Logging, see the Logging Setup section in the Administrative Console documentation.

The Log Events, Insert or Update, are shown with grey background. The columns being logged are shown with a white background with their old and new values. The Log Events are sorted in descending order by date.

Undo Changes

Allows the user to undo the changes made to the current record on the page.

For example, if they are using POUPPR, there is a header (or POPPvDetail) record, and an item record. Undo Changes will remove changes to the item without changing the header.

Undo All

Allows the user to undo changes made to all the records on the page.

Copy Record, Paste Record

Copy record will make an exact copy of the active record. When the user puts the page in Add Mode, the paste record will populate the page with an exact copy of record. If the page has multiple tabs that allow multiple records, it may be necessary to copy and paste that record separately. However, the system will not allow the record to be saved if any of the pasted record detail has to be unique.

This functionality differs from a Copy tool available under Tools on the side menu on pages within the software where appropriate. For example, a Copy Set tool would create a copy

of the entire set and change the unique information on the new set based upon the tool dialog page.
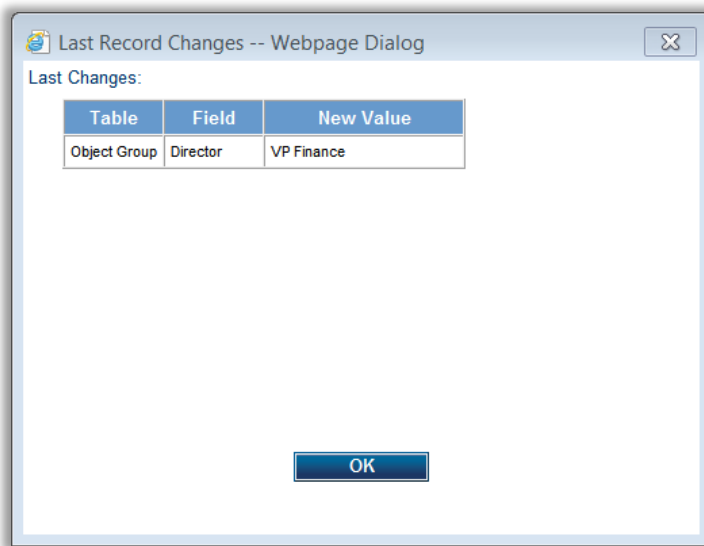
Delete Record

Allows the user to delete the current record.

View Last Changes

Selecting View Last Changes from the Options Menu will display a list of the most recent set of changes.
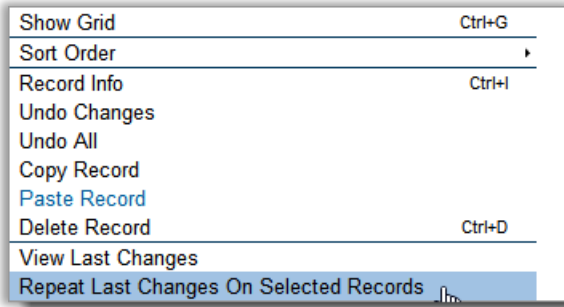
In the example below, a new value "VP Finance" was entered in the "Director" field of the Object Group (GLUPOG) page.


Instead of changing each record with the desired change, this most recent set of changes can be applied to a set of selected records. To accomplish this, use "Find mode" to select a set of records, then select the Repeat Last Changes On Selected Records option.

Repeat Last Changes On Selected Records

Selecting this option will apply the most recent set of changes to the entire working set of records, as selected in Find mode.

| Show Grid | Ctrl+G |
Sort Order	▸
Record Info	Ctrl+I
Undo Changes	
Undo All	
Copy Record	
Paste Record	
Delete Record	Ctrl+D
View Last Changes	
Repeat Last Changes On Selected Records	

Selecting the Repeat Last Changes option will present a confirmation dialog similar to the following:
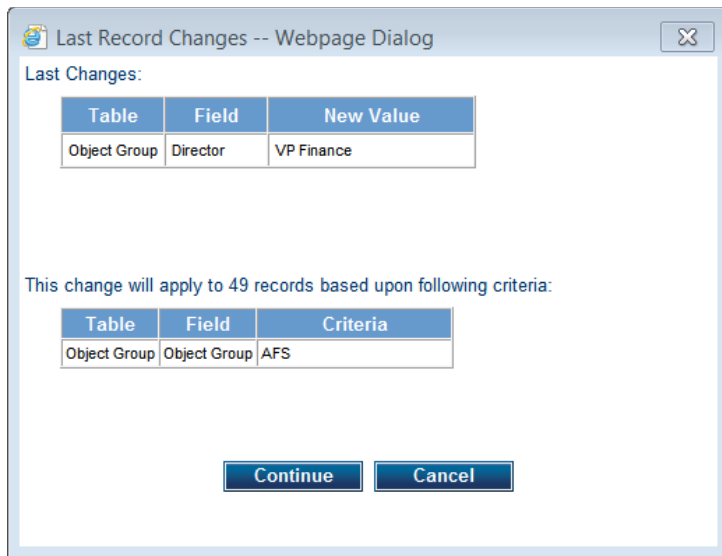
This confirmation is provided in order to verify the specific changes that will be made, and the criteria and count of the records that will be selected. If the changes and the selected record set are correct, click the Continue button to apply the changes.

This tool will run on the server. A confirmation of the request will appear, similar to this:
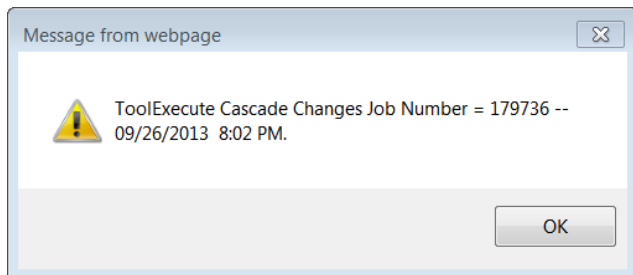
The status of this process can be confirmed by locating the tool request on the "Jobs" page, by job number. Once this background process has completed, the requested changes can be seen by re-querying the relevant records.

Note: "Repeat Last Changes" is not programmed to function with a loaded "Named List".

Output to Excel

The Output to Excel button will appear gray until activated. To enable Excel Output, select Find to perform a search or "Select All" from within the Search option. Most BusinessPLUS pages have an Output to Excel option. BusinessPLUS Utilities do not export to Excel, but capture data using CDD and export to Excel.
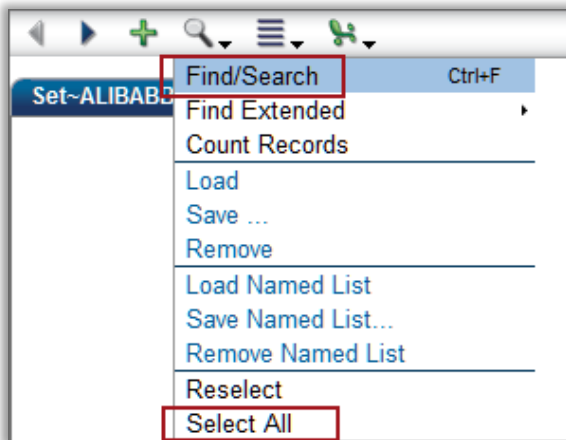
Example of gray Excel icon: Example of active green Excel Icon:

From within a page, select Find to search on records, or Select All.

Once the Excel icon turns green, the records displayed in the Entity List can be downloaded into Excel. To export, choose either Run Excel Report (saved reports) or Create/Edit Excel Reports (create new or update saved reports) from the drop-down.
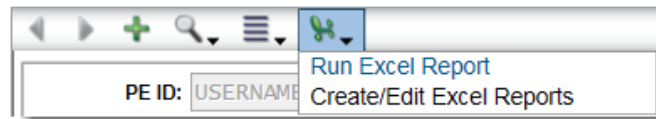

Run Excel Report

Run Excel Report lists saved reports that the user has created. Click on the desired report and the export process begins. In the example below, the saved report is titled "Position section – ALL". The report is accessible to only the user who created the report, not accessible to all BusinessPLUS users.
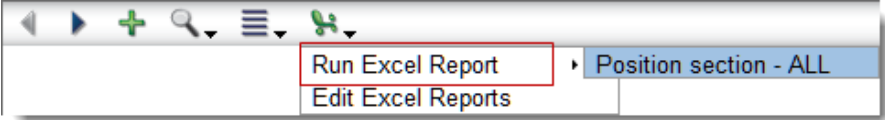
Before displaying the Excel report, a prompt will ask "What do you want to do with [Report Name]?" Notice that the report's name is a system-generated title composed of letters, numbers, dashes, and underscores. Choose Open, Save, or Save As.
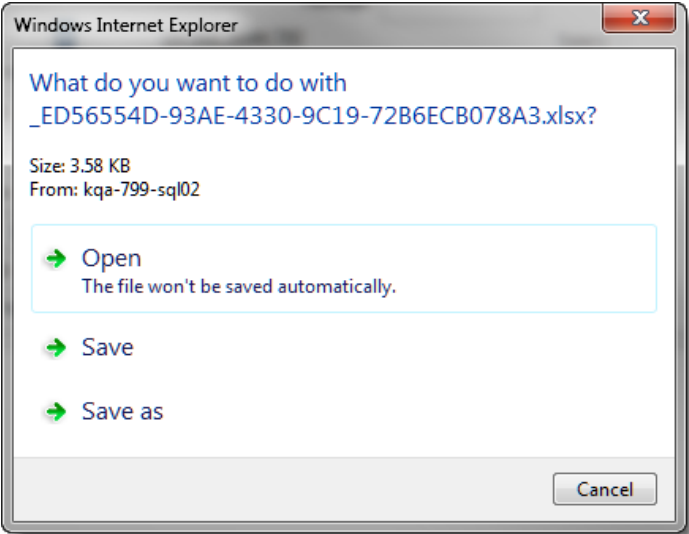

Example of "Save As":
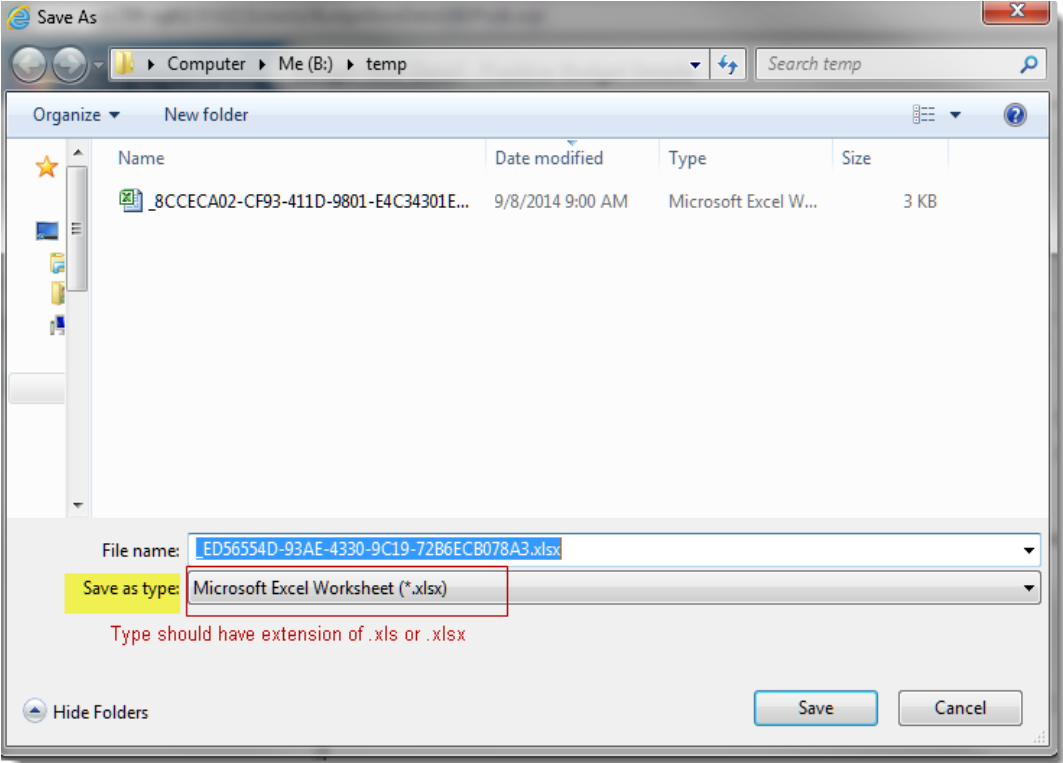
If choosing to Open, the data exports as Read Only, but is fully savable by choosing "Save as" at any time. The example presented is from Microsoft Office 2010 and may look different from the user's version of Excel. The process is the same regardless of which version is used. Save within the appropriate data hierarchy for the organization.

Create/Edit Excel Reports

Create/Edit Excel Reports allows one to run, save, load, edit, or delete Excel Output reports.
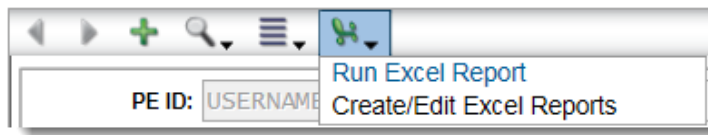
Column Selection Tab

After selecting Create/Edit Excel Reports, a dialog box will open showing the Output to Report Webpage Dialog box. The dialog box defaults to the Column Selection tab. Choose which data fields to download to Excel for viewing or manipulation.

A BusinessPLUS page that has multiple tabs or sections will display data divided by Section Headers. The screen shot below highlights Section Headers in yellow. The Header box must be checked in order to choose data fields within that section. The check means that field is selected. A user may choose one or more data fields, Select All in Section, or Select All within every section.

Data elements are sorted alphabetically within its section.

The Output to Report Dialog Box:
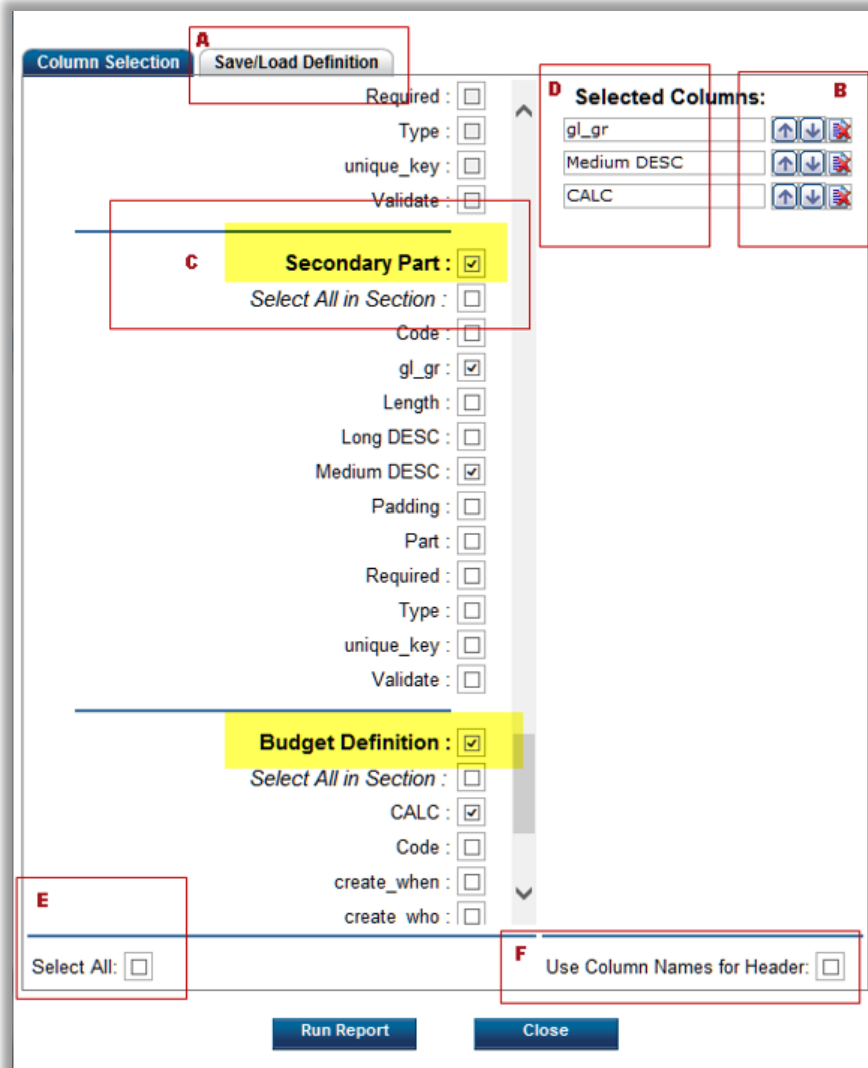
A   Save, Load, Delete new or existing reports. See more on this tab below.

B   Arrange output's column order. First selected field will display in Excel's column A; second selection will become column B. To rearrange, click "Up" to move data, before exporting to move data column left of present layout. "Down" moves data to the right.

C   The Section Heading; also referred to as the Data Source Check box or Parent. Check this box to enable section's data fields.

D   Data fields selected from Column Selections. Also the Column Name within Excel. More on Column names below.

E   The "Select All" option will automatically check all data fields available within the Dialog box. Uncheck one or more boxes as desired.

F "Use Column Names for Header" prompts system to use Table names like those from Schemas or Field Help (see Field Help). Also see information about changing column names below.

Note: Dialog box can be resized and is equipped with scroll bars to ease navigation.

Each Output to Report dialog box will be unique to the active page used to export data. Hence, each dialog box will have at least one Section Header. The Section Header is the top level within the Column Selection and is referred to as the Data Source Element or "Parent" if there are multiple sections (multiple tables). In fact, the average BusinessPLUS page manages data from one to multiple tables.

The following is an example of exporting from PO Purchase Requests (POUPPR). The page has three Section Headers: Purchase Document, Item Details, and Association Detail. Data fields from each section are selected and placed under "Select Columns" area in the order the field was selected. Note that the data fields will become column headings in Excel. Even though data will be downloading from multiple Sections (tables), all the data will export together. In the screen shot below, the Selected Columns on the right side depict how the column headings will present. Change the order of these columns at this time if desired. Adjust the order by using the up or down arrow to the left.
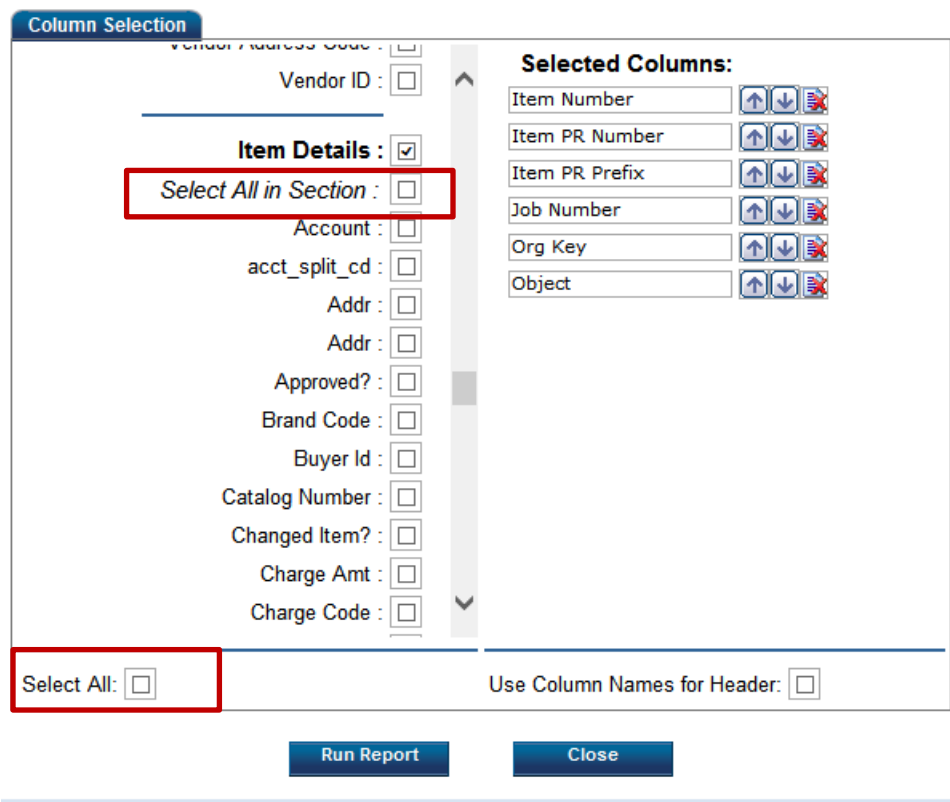
Columns within a Section may be selected individually or by checking "Select All in Section". If multiple sections will be downloaded, and all table columns are to be to be exported to

the Excel worksheet, the "Select All" checkbox will place a checkmark in all the boxes of the output window.

An unwanted column selection may be removed by selecting the red X to the right of the arrows. Deleting the column from the Selected Columns will remove the column from the output and remove the checkmark for that item in the section where the table column resides.

In the example above, notice the presence of two fields called "Addr". If the difference between the two fields is not readily known, run the report a second time with the "Use Column Names for Header" box checked. Looking at the output, find the Excel column name on the Consolidated Field Help feature (see Consolidated Field Help). Note that "Use Column Names for Header" may be used in conjunction with the **UTZZ upload utility to assist in streamlining bulk uploads.

Another feature is the ability to edit the column names to something more meaningful. Delete the text within the field and type in the desired wording. So in the earlier example of seeing two identical fields, edit the name of one (or both fields) and save the report for future use.

Three options exist to create reports that have meaningful column headings. Once the report is perfected, it can be saved and used repeatedly by the user (not group). Access saved reports from the Save/Load tab (see A above, or view the section on Save/Load Definition below).

Below are the three types of column headings from data exported to Excel:

| Version	Color of Column Heading (color corresponds with screen shot below)
Version 1 (blue)	Choose data and run report using default settings.
Version 2 (green)	Check the box in lower right corner "Use Column Names for Header" (see F above). COLUMN NAMES will reference table names, like those found on a schema or Field Help. If box "F" is checked, then COLUMN NAMES will supersede other field names.
Version 3 (pink)	Type preferred name in Selected Columns field(s) (see D above)

<u>Example</u>: One report presenting three different Column Names emphasizing difference between Version 1, 2, and 3.


Once "Run Report" has been clicked, the browser will ask how to handle the report: Open, Save, or Save as.

Excel's numeric output may contain tiny green triangles in the upper left corner. These numbers must be reformatted before using in calculations, otherwise the numeric data will most likely be interpreted as text. If this is not done, the formulas tallying information in those cells will not work on those cells. Imported data often presents a formatting conflict causing green triangles.   Place the cursor in the cell with a green triangle and a yellow exclamation point will appear. Excel tries to help users make the most of its software. The green triangles are most common with numbers, indicating that cells with the green triangles will not calculate until the conflict is resolved. The fastest way of resolving the issue is to select the cells, click on the caution/exclamation icon, and convert the cell's type from text to number.

Example of tiny green triangles:
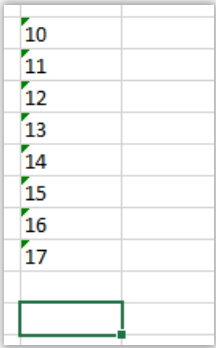
Select entire range, click exclamation, and click "Convert to Number".
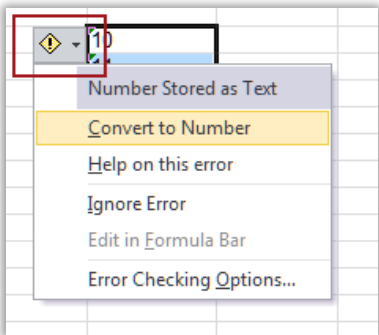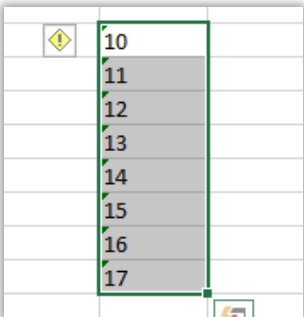
The data will now calculate or respond to auto sum.
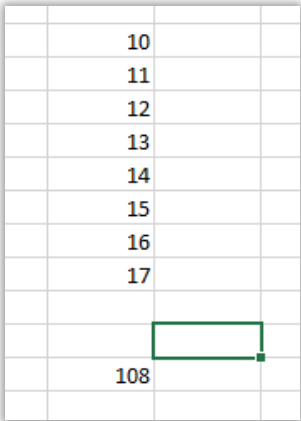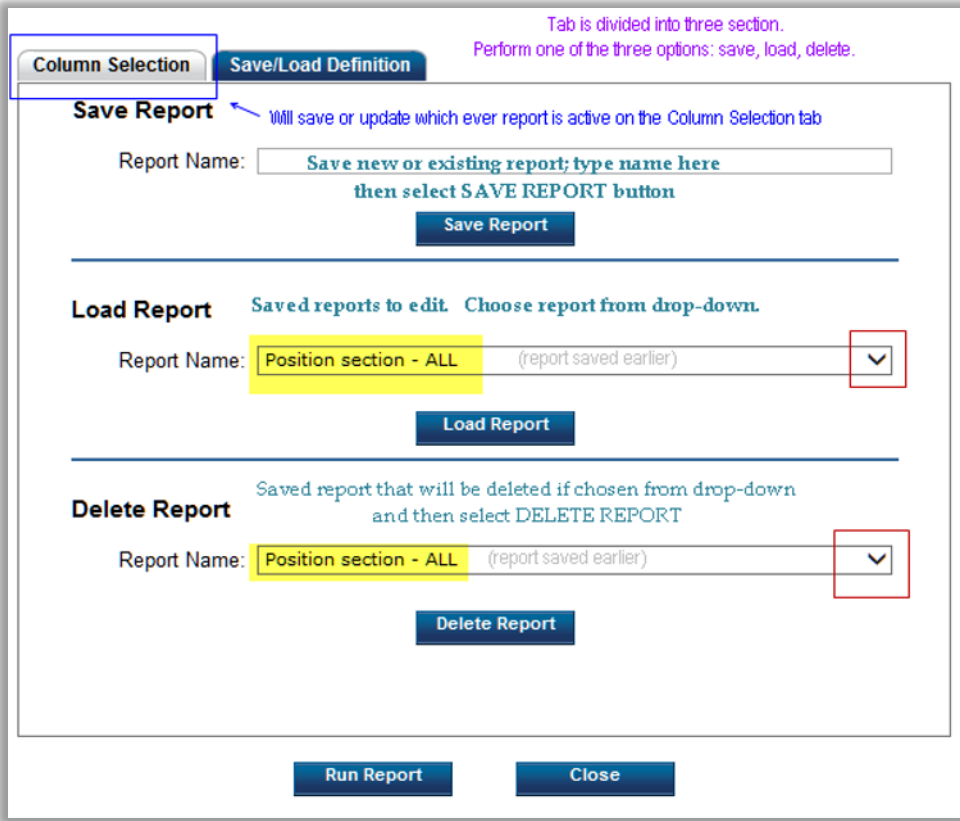

Save/Load Definition Tab

The tab has three sections: Save, Load, and Delete. Each section has a blue box to initiate action, such as Save Report.

Note: Use the mouse to activate (or tab to) commands in the blue box, like Save Report or Load Report. The Enter key acts like the Escape key and closes the Output to Report dialog box without processing or saving.

Saved reports are accessible to the creator. There is not a public folder for Excel output.

Saving a Report

Once the report output looks good, save the report to run quickly in the future. Run saved reports with just a few clicks at Excel's "Run Excel Report" option from the drop-down menu.

To save, click on the Save/Load Definition tab, place the cursor in the Report Name field in Save Report section. Type a name and then hit the blue command box "Save Report" with mouse (or tab to command). The following message will display:
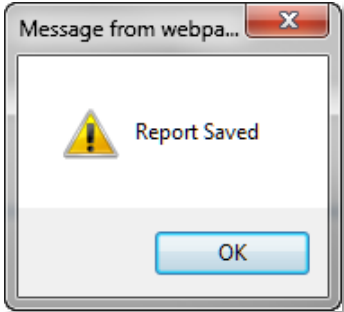
Once saved, the report will be visible immediately within Load Report and Delete Report drop-down menus. Once the report is saved, any updates to the report will not be saved unless the user saves the updated report as if it were a new report. Loading the report, editing, and then running will not save the report. Overwrite the previous report by saving with the same name (or a new name and delete the old version).

Which Report is Selected?

All saved reports are visible when clicking on the Report Name drop-down box in either Load Report or Delete Report sections. Saved reports can be selected to be loaded or deleted. Even though the layout is similar, Load Report is separate and different from Delete Report. Each section has a Report Name command, but one will load while the other deletes. Once the Report Name is selected for a specific task, clicking on the blue command button initiates the command. The example below shows the report "Generic Excel Rpt 3" is selected to be loaded; the selected report has a blue background. Once selected and the user pushes the related blue command button "Load Report", the report "Generic Excel Rpt 3" will be loaded.

Also see the Delete Report section. The report Generic Excel Rpt 2 is selected. Delete Report section is separate and will be unaffected by the Load Report section. Hence, choosing to Load Report "Generic Excel Rpt 3" has no effect on "Generic Excel Rpt 2".

Loading and Updating a Report

With the Save/Load Definition tab active, click in the Load Report section, Report Name, and select a report from the drop-down list. Then click on the blue button "Load Report". The screen shot below will display while the report loads.


Once the Load Report icon disappears, the selected report will populate the appropriate fields within the Column Selection tab. Meanwhile, the user will remain on the Save/Load Definition tab until deciding the next actions to take. The User may navigate to the Column Selection tab to review or update report data, choose "Run Report" or "Close" from the Dialog box footer.

Delete Report

With the Save/Load Definition tab active, click in the Delete Report section, Report Name, and select a report from the drop-down list. Then click the "Delete Report" button. The message below will display to confirm the user's intentions.
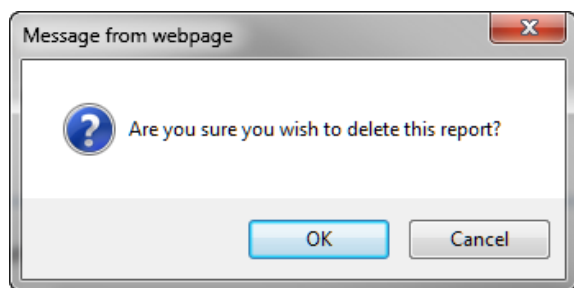
Select OK to confirm and continue with the delete process.
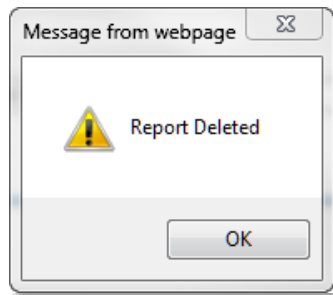
To verify the report was deleted, return to the Delete Report section and see that the deleted report is no longer present.

Once created and saved, reports can be launched from the Home tab on the Dashboard.

Add Excel Output Reports to the Dashboard

To add Excel Reports to the Home Tab on Dashboard, open the Customize Dashboard page. This is located at //<server name>/ifas7/home/customize (replace <server name> with your own server's name). It will open up to the Customize screen with the "HomePage" tab selected.

- Select the Content subsection of the "HomePage" tab.

- Change the Existing Content for Group drop-down to Finance.
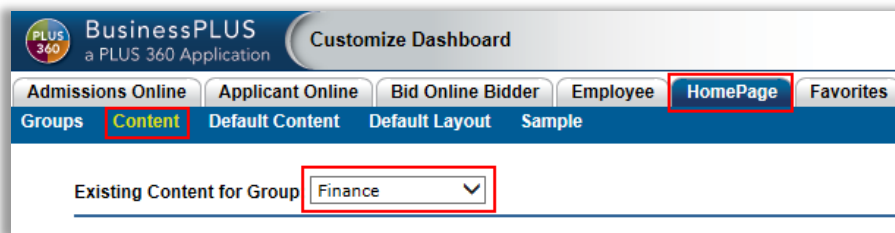
- Add the following content:

    - Description: Excel Reports.

    - URL: ~/Home/Finance/ExcelReports.ascx

    - Leave the Type as WebPart.

    - Leave the Width to Narrow.

This will add the Excel Reports (Narrow) as an option under the Change Content subsection of the Home tab.

When selected, it will appear on the left side of the Home page.

- To select the reports to display, click on Manage Reports from within Excel Reports.

This will open up a new window titled Manage Excel Reports. This window will display all of the created reports that the user has made through the Excel Output Tool.
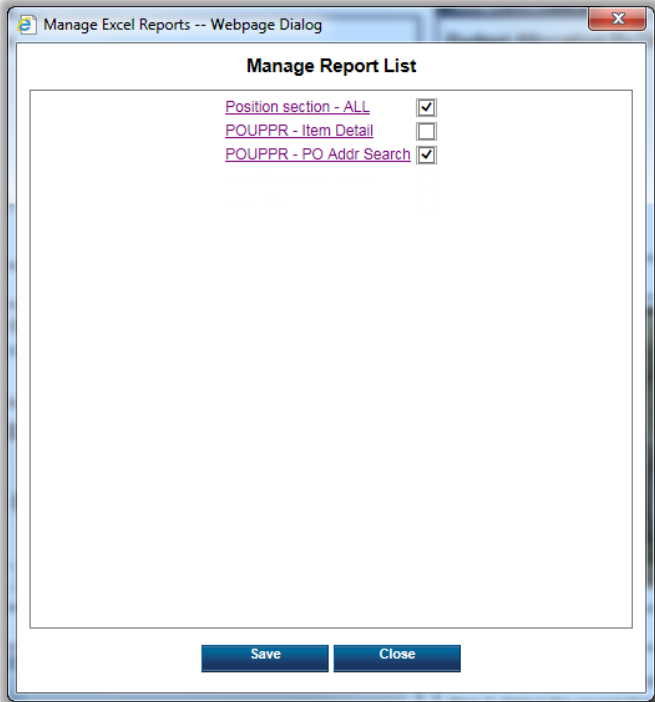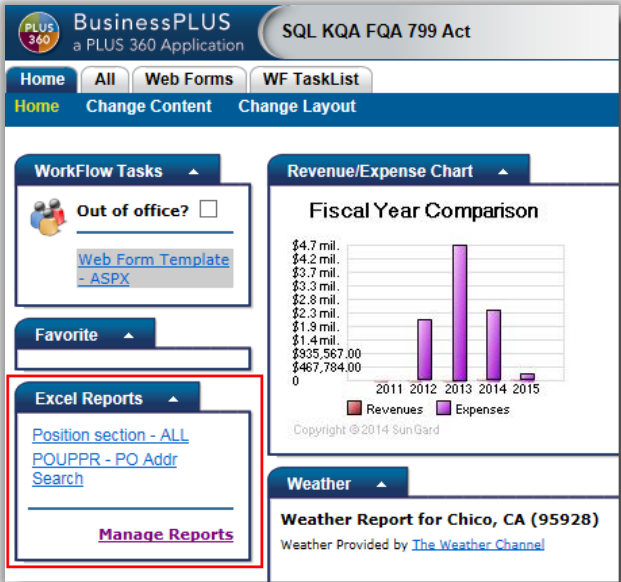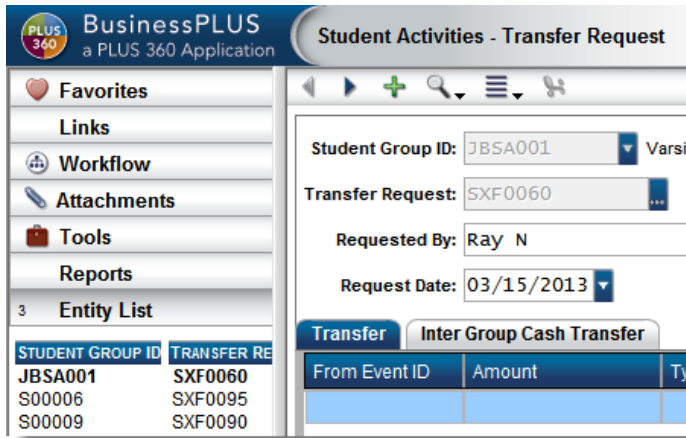

- Check the box next to the report to be added to the Home Page. Click on Save, then Close, to close the window and update the Home Page.

Side Menu Options

When viewing a page, the navigation side bar appears on the left-hand side of the browser window (shown below). Click on the section names to expand lists.

Favorites

When pages are launched from the BusinessPLUS Dashboard, the Favorites defined on the active tab will be displayed on the side menu of the related pages. The same pages launched from the All menu will not show the Favorites, as they are derived from the Dashboard Preferences. When Favorites are available from the side menu, a "heart" icon will display.
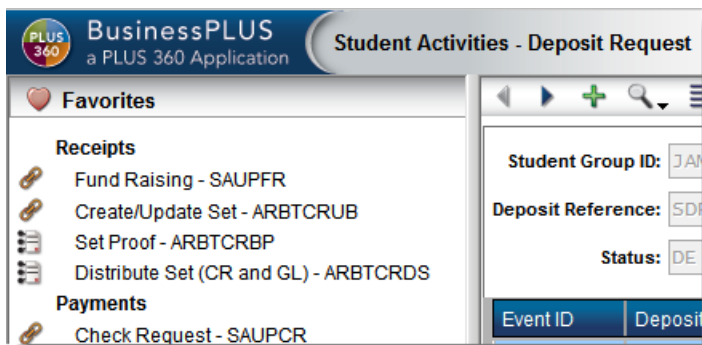
See the section in this guide for information on setting up Favorites.

Links

Many BusinessPLUS pages have pre-defined Links to other related pages and processing-related jobs. In the example below, purchase orders can be printed from the Purchase Request page (POUPPR) without leaving the page to print from the main menu tree.
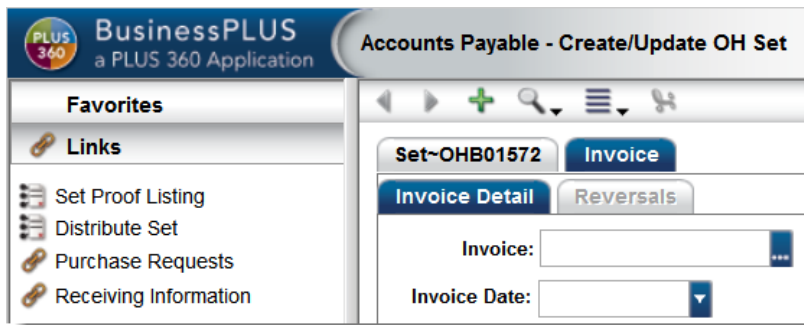
Workflow

BusinessPLUS jobs represent work that is being done on a user's behalf by the BusinessPLUS Web server or the application server. There are several types of jobs, and these are all tracked in the same location and consolidated on the same Jobs List. Workflow is the type of job processed by the Workflow engine, which may be submitted from multiple areas of BusinessPLUS. When a page has a Workflow item pending, an icon will appear to the left of the title. Clicking on the title will display the item.
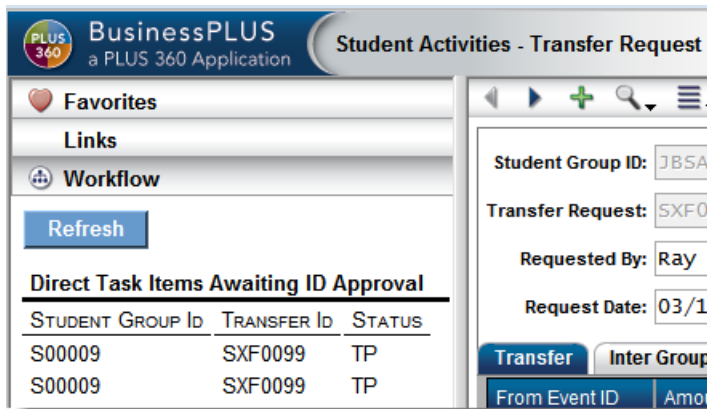
Attachments

Allows the user to view and download attached files or add Threaded Notes. (See Threaded Notes in section in this guide.)
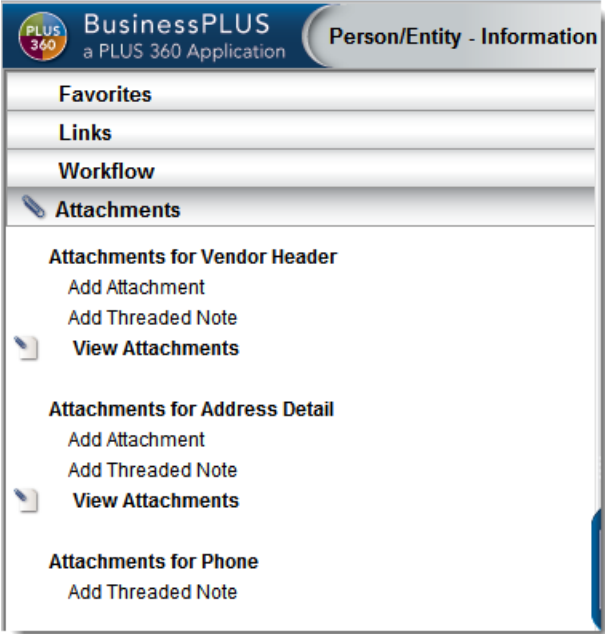
Tools

The Tools menu option displays a list of any additional tools related to the active page.
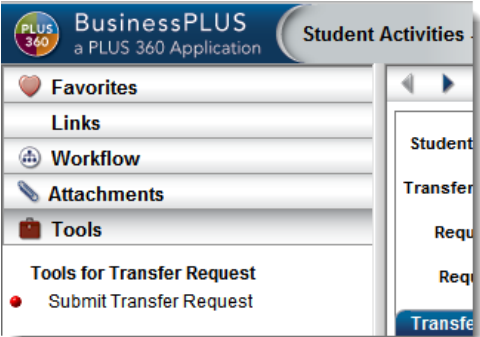
Reports

This option displays a list of available CDD reports that have been attached to this page.

Entity List

The Entity List displays the primary information specific to the active page and its purpose. In most instances, the default view will show open items created by the user viewing the page. Using Find and selection criteria, the Entity List will show the results.

Other BusinessPLUS Page Navigation Options

BusinessPLUS Keyboard Commands

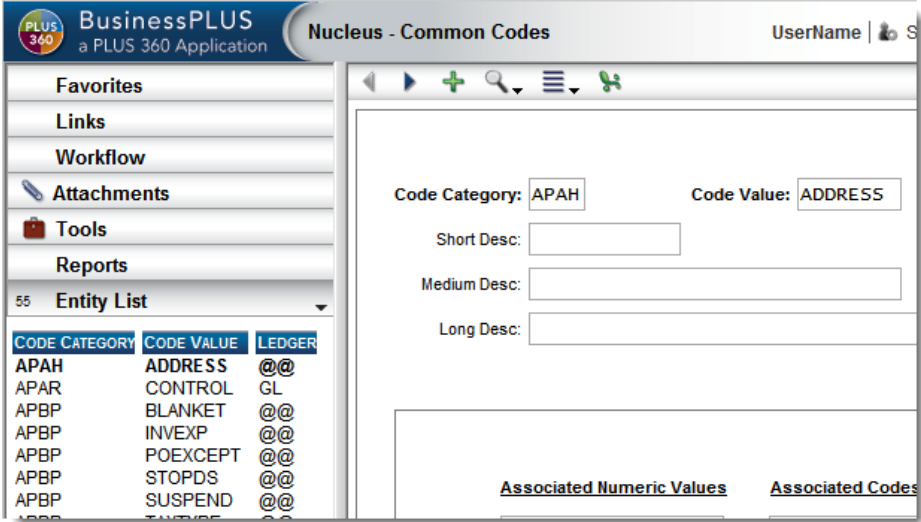| Keys	Function
Ctrl plus key	Press the Ctrl key and the key noted below, in combination, for the following results:
Ctrl+A	Add button for the navigation bar associated with the field that currently has focus.
Ctrl+D	Selects the Delete option for the navigation bar associated with the field that currently has focus.
Ctrl+F	Toggles Find mode.
Ctrl+G	Toggles grid mode for the grid associated with the field that currently has focus.
Ctrl+L	View the list box attached to a field with an arrow or invokes the lookup functionality.
Ctrl+T	Display the last used auto-generated seed value for a field.
Ctrl+N	Next button for the navigation bar associated with the field that currently has focus.
Ctrl+P	Previous button for the navigation bar associated with the field that currently has focus.
Ctrl +1, 2, 3, 4, etc.	Move to another tabbed page on a page. For example, if there are four tabbed pages, press Ctrl +3 to move to the third tab from the left.
Ctrl+;	Inserts the current date in a date field.
F1	Press F1 to display the help file associated with the page you are viewing.
F5	Refreshes the page.
TAB	Press the Tab key to move through the fields on a page.
Shift+TAB	Holding the shift key when pressing Tab will move backwards through the fields on the page.
Shift+Ctrl+T	Toggles debug tracing.
Shift+Enter	Saves text entered in free-form text fields – Notes, Comments, Text, etc.

Esc	Clears all data entered on the record since the record was last saved. Clears the last command in process.
Ctrl+Q/K/U Account Controls	In account control fields, Ctrl+Q = Quick Key mode, Ctrl+K = Key/Object, Ctrl+U = Fully Qualified. (Only applicable if the ledger is defined to use a Fully Qualified Account.)

Selection Options for Page Fields

Some fields display sub menu options (or combo boxes) that will drop down from the field when the user selects the arrow or ellipsis to the right of the field.

Drop-down Menus

The arrow indicates a list or "pick list" of options available for this field. Press the arrow or select the Lookup (Ctrl+L) and a drop-down box of options will appear.
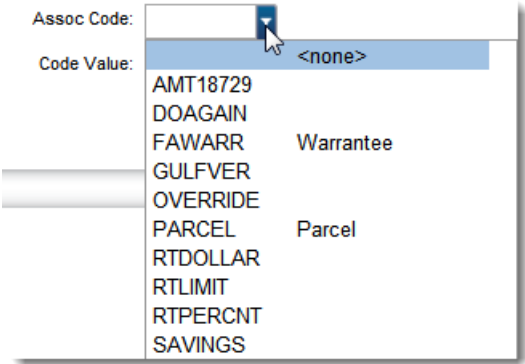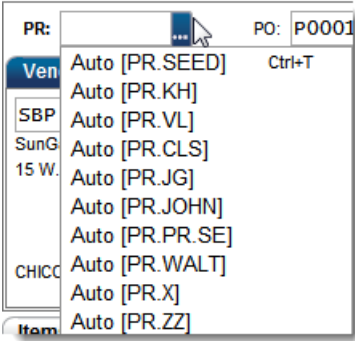

Lookup / Ctrl-L

The ellipsis (...) indicates when there are hidden options for a given field. Click on the ellipsis to display the options available. Options vary by the type of field, and include auto-generated seed values, data lookups, or "account number / control" options.
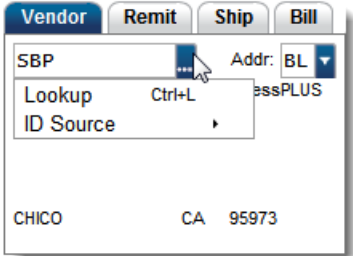
Press the button to view the drop-down box of auto-generated seed choices such as the one below:

Ctrl-T

An option with Ctrl+T next to it can be selected without using the Auto drop-down box. To select the last used entry, place your cursor in the empty field and press Ctrl+T. In some cases, using the Lookup (Ctrl+L) command in an ellipsis field will cause a Data Lookup Dialog Box (shown below) to open.

Data Lookup Dialog Box

To create a filter to search for data in the Data Lookup Dialog box, the user must select or enter information on the three fields in the box. The option in the first field will vary by the Lookup field; select the type of information by which to search. In the second field, select a qualifier from the list of options. In the third field, enter the data that is requested. BusinessPLUS employs "filter as you type" technology for faster results.
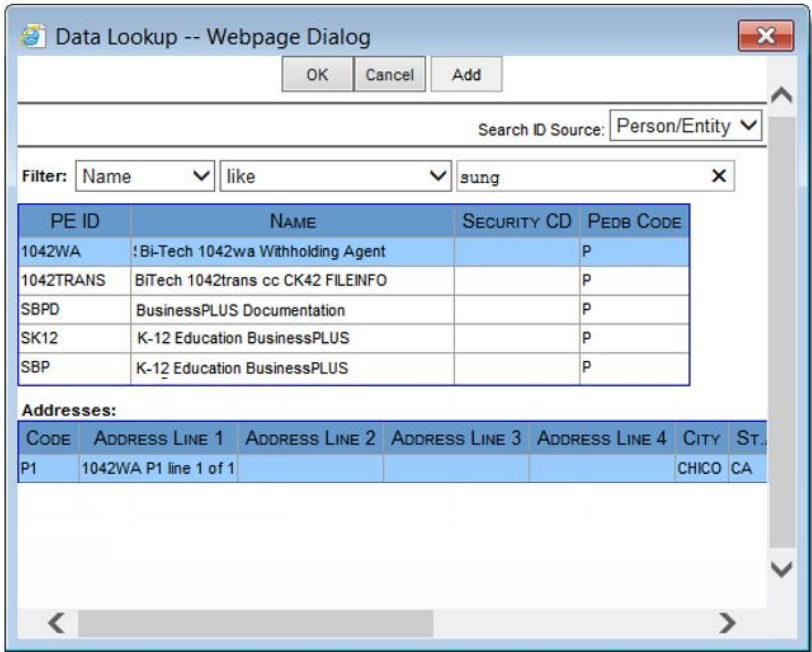
Account Number ~ BTEditAccount Control

The account number format displayed on pages will be determined by the ledger-specific Input format defined on the GL General Information (GLUPGN) page. Below are examples of a Key Object format and a Fully Qualified format.

Clicking the ellipsis at the end of the account field will provide additional options for the format displayed.
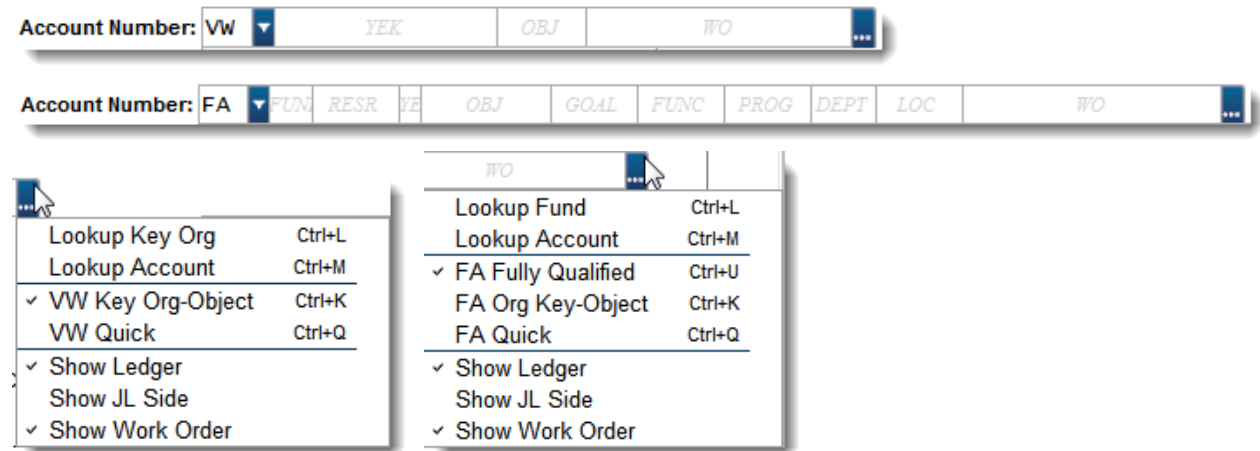
When a user performs a lookup on the Key field in an EditAccount control, the new lookup page "OrgKeyLookup" will be used.

The OrgKeyLookup page allows a user to filter the results based on one selectable field as well as up to eight background parts. Each of the selection criteria will be treated as a "like" comparison allowing for the use of wildcards in the search. Each additional selection criteria chosen will narrow down the resulting records further.

QBE Product Lookup

An alternative Product Lookup is available on the Product Id field, which can be set to enable or disable on a page-by-page basis. To enable, go to Options, Settings, Page Specific tab, QBE Lookups – set to Enable. To use the standard lookup, set to Disable.

If this lookup is enabled, the following page will be shown:
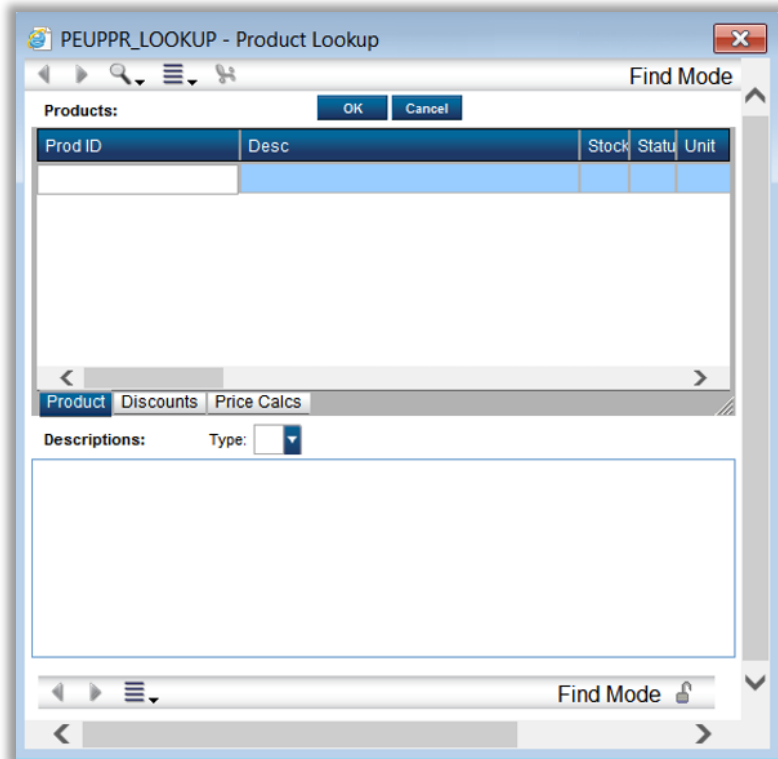
The user may search by any field on the page by entering search criteria and pressing enter or selecting Apply. All standard page selection criteria may be applied (e.g., ABC%, >ABC, <>ABC).

The fields shown on this lookup are the same as what can be found the on the PEUPPR – Product Information page. Column width and order may be adjusted on this page at any time (the layout of the grid will be saved for the next time the user enters the lookup page).

To select a value to bring back to the page the lookup was launched from, highlight the Prod Id row in the grid and hit the OK button at the top of the page or double-click the highlighted row. To exit the lookup without bringing back a value, click the Cancel button at the top of the page or just close the window.

Favorites Menu and Dashboard Favorites

Users can access pages with the click of a button by adding them to the Favorites menu. The Favorites menu is designed to provide the user with an easy way to return to the pages and launch the BusinessPLUS functions that they use regularly. Below is a description of the Favorites options and how they are used.

The Favorites drop-down includes the following options:

- **Personal Favorites**: A list of all the personal favorite menus created by the current user.

- **[New Personal Favorites]:**   Use this to create a new menu of personal favorites.

- **Public Favorites:**   A list of all the public favorite menus (available to all users).

- **[New Public Favorites]:**   Use this to create a new menu of public favorites.

Note that these "favorite menus" represent an entire tree of favorites (each may contain multiple favorite jobs and nested levels of folders). When the user selects an option within any of the favorites (in the tree), the following options will be added to the drop-down favorites menu:

- **New Folder** (added within currently selected option/node).

- **Rename** (applies to currently selected option/node).

- **Delete** (applies to currently selected option/node).

Clicking a name in one of the favorite menus (within the drop-down list) will load that menu under the Favorites option of the menu tree. A check mark indicates which favorite menu is loaded. Clicking a "loaded" name will unload that menu. The menus loaded will automatically reload when users launch BusinessPLUS.

Be sure to name the new Favorites folder before adding to it. When users create a Favorites menu, it will automatically enter "rename mode" so the user can provide a name for it. After entering the name, press Enter (or click elsewhere on the tree) to save it.

Once the favorite menu exists, users can drag any jobs to it by holding down the control key, clicking on a "terminal node" (a job, a page, or a report), and dragging it to the desired location (Ctrl, Click, & Drag). Similarly, they can drag jobs around within the favorites menu to reorganize it. Changes are automatically saved to the database.

Dropping an item on a folder will add it to the end of that folder.

Dropping an item on a job (not a folder) will add the item just before that job.

Dropping an item in another favorites menu entirely will make a copy instead of a move.

When a job is moved into a Favorites menu, the user responses will go with it. For example, if users have already filled out selection criteria, it will become the default value within the favorite. Within the job, there is a Save Changes button that can be used to alter

the default values for that job (this option is only available on jobs within a favorites menu). The defaults are stored within the favorite and will remain unchanged unless users use that button. After dragging jobs into a favorite menu, they may want to rename the jobs so that they make more sense or so they will better describe the default options that were selected. Rename is only available within the Favorites menu, not in the standard BusinessPLUS options.

## Personal vs. Public Favorite

- **Personal** - This option allows the user to create Favorites that only appear when the specific user is in the BusinessPLUS environment.
- **Public** - This option allows the administrator to designate a specific set of Favorites for a group of users in the BusinessPLUS environment.
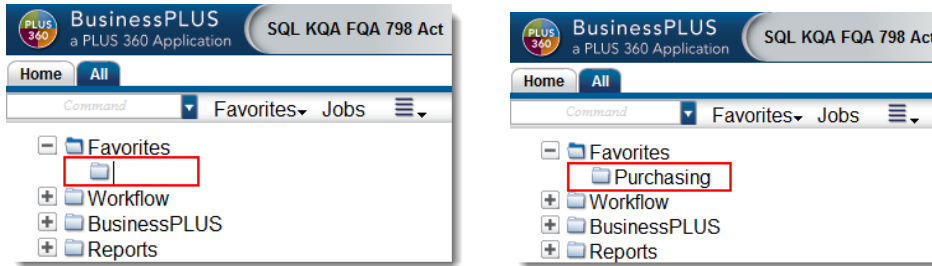
Creating Favorites

Click on the Favorites menu.
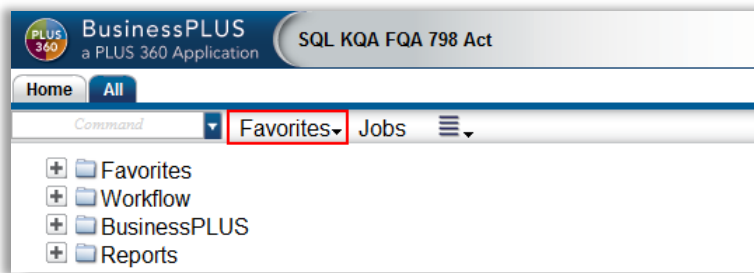
Click on New Public Favorites. If creating a personal favorite, click on New Personal Favorites at the top of the drop-down list.
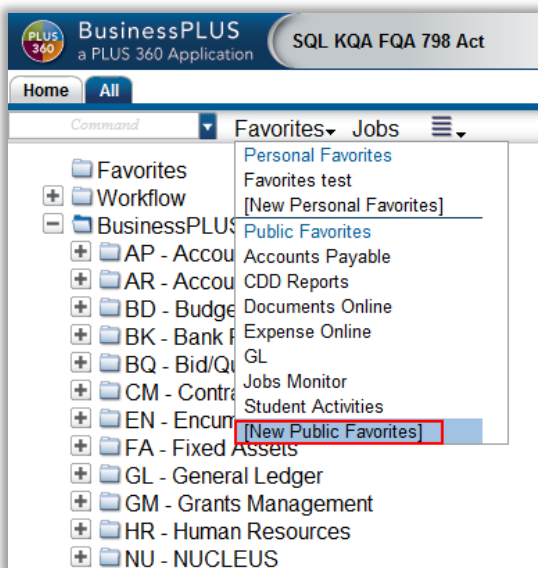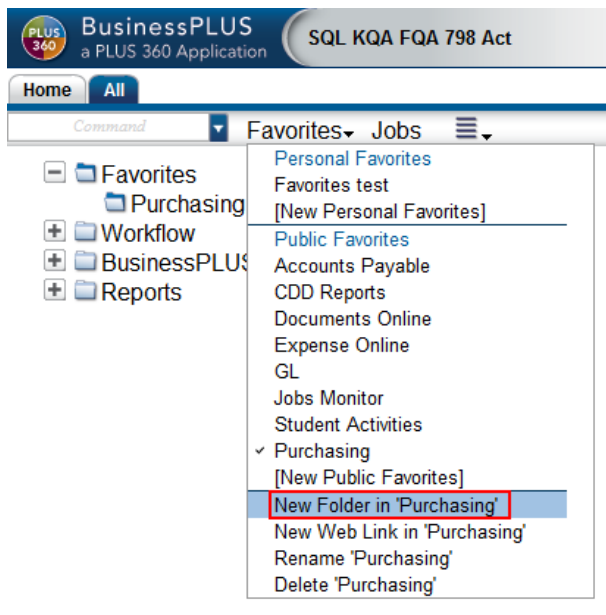
A new folder will appear under Favorites. Type in the desired name next to the new folder. Press Enter or left-click on the mouse to set the folder.
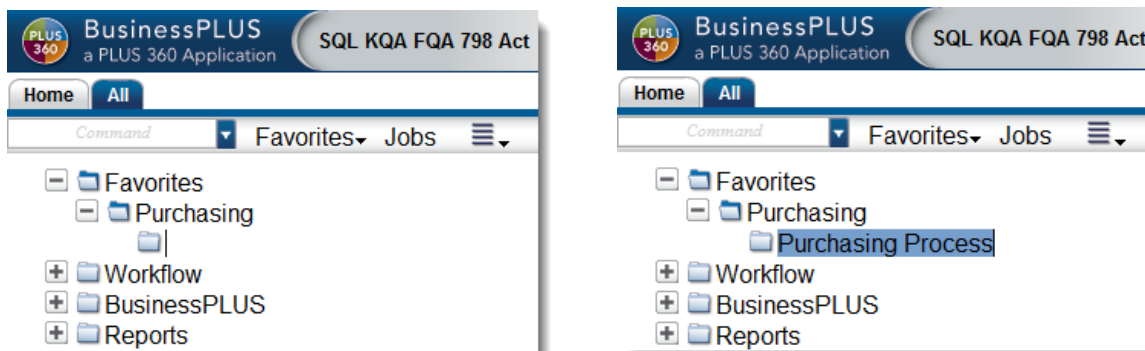

Adding a Subfolder to an Existing Favorite Folder

To add a subfolder click the folder icon. Click the Favorites Menu and select New Folder in 'location'.
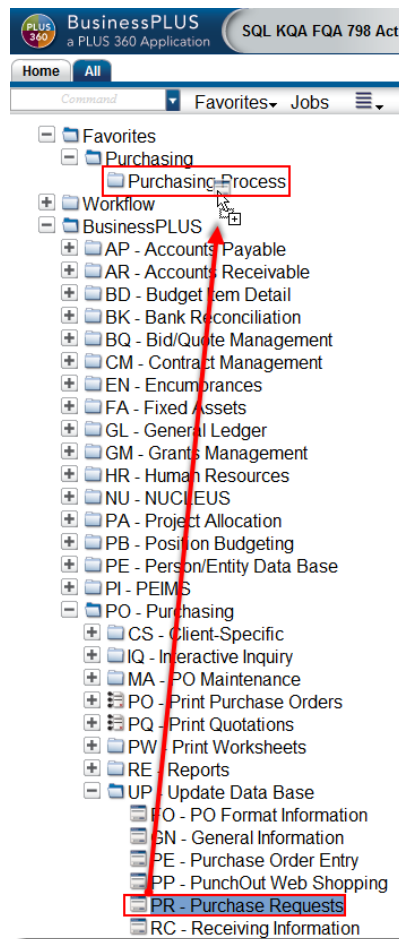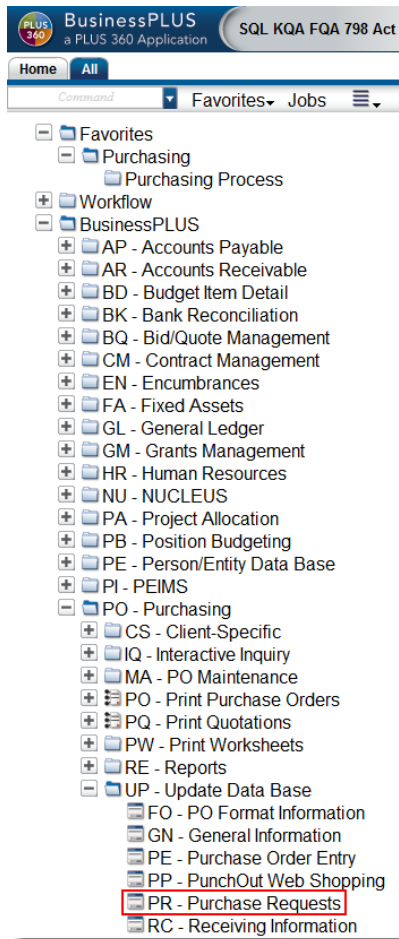

A new folder will appear. Type in the desired name of the subfolder. Press Enter or left-click the mouse to set the folder.
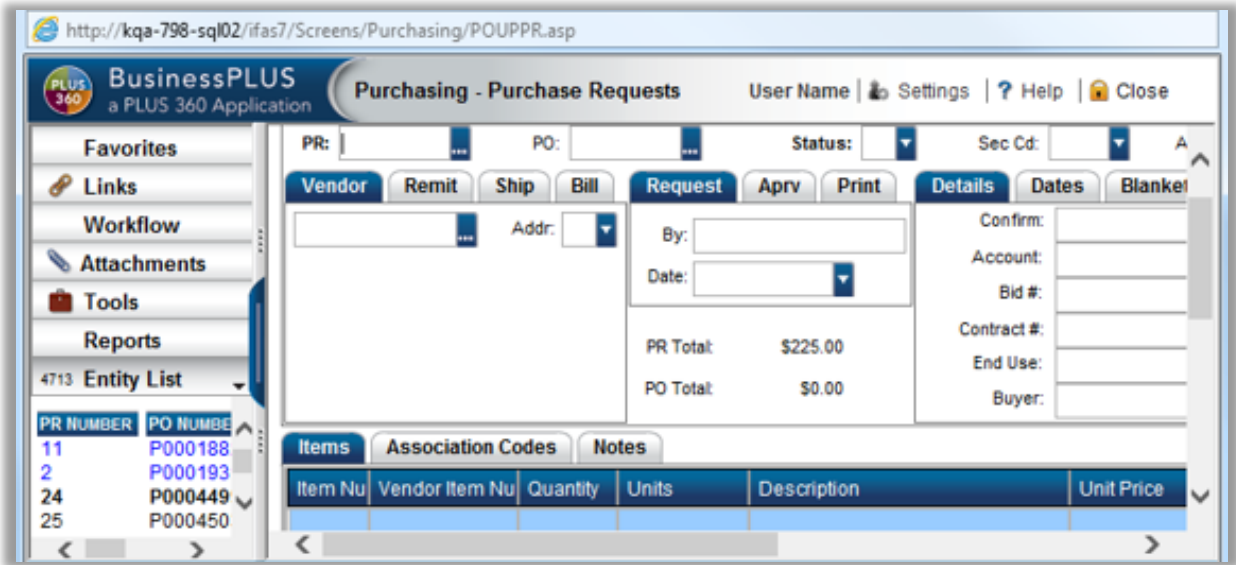
Dragging Masks into Favorite Folders

Navigate through the tree to find the Mask to add to the Favorite folder.

1. Hold down the Ctrl key.
2. Click the left mouse key.
3. Hover over the Mask.
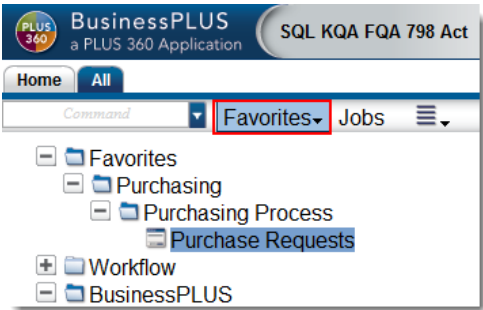4. Drag the Mask into the appropriate subfolder.

Renaming a Mask

To rename the Mask, first click on the Mask. If the page for the Mask pops up, close it.

Click on the Favorites menu.

Click on Rename '… '.
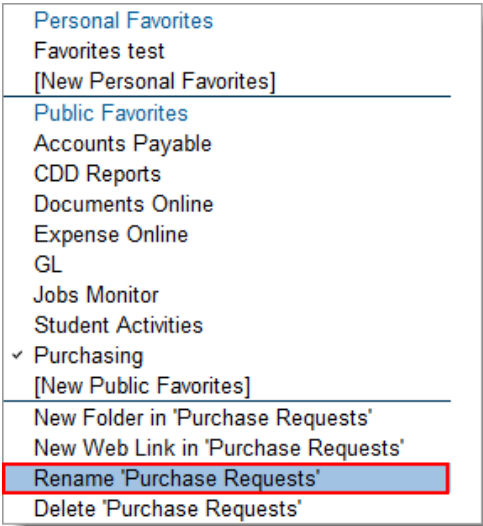
Type in the new title. Press Enter or left-click on the mouse to set the folder.
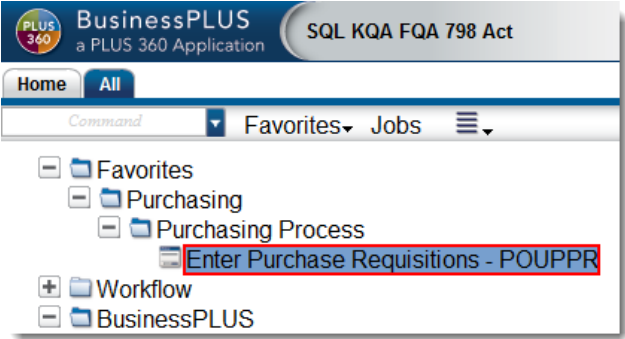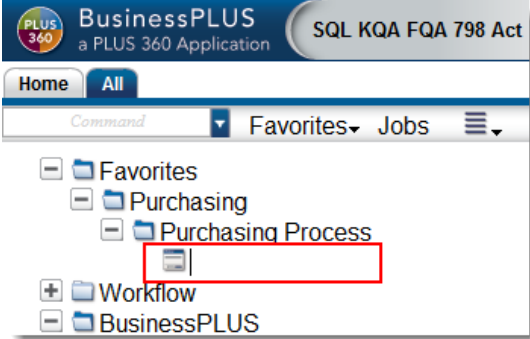
Creating a New Favorite Tab on the Dashboard

To create a new Favorite tab on the BusinessPLUS Dashboard, click on the Settings icon in the upper right hand of the page.
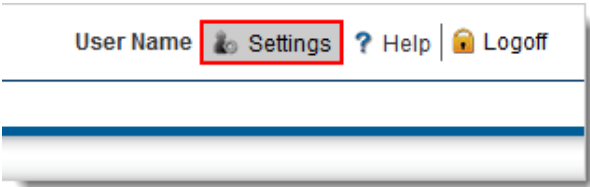
Click on Preferences.
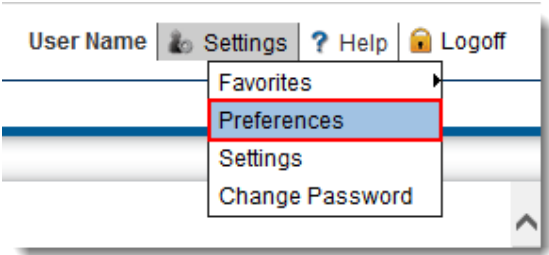
The Preferences window will pop up. Check the Favorites that should available as a tab on the Dashboard and press Save.
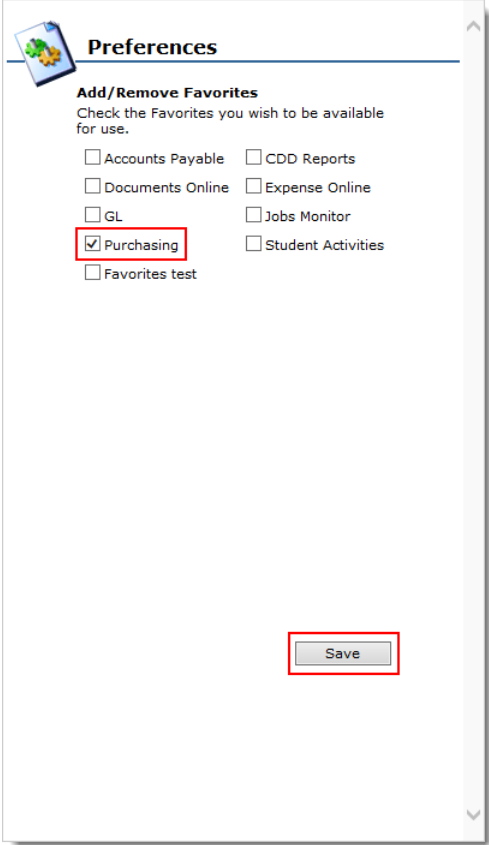
A new tab will appear on the BusinessPLUS Dashboard.
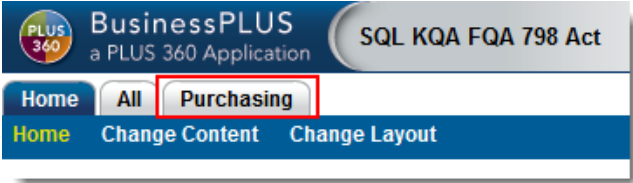
Click on the tab to see the new Favorite. (Users may need to refresh the page before the new folder within the tab appears.)
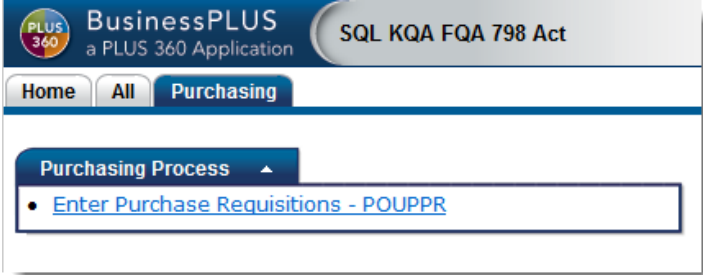
The example below shows several Favorites.
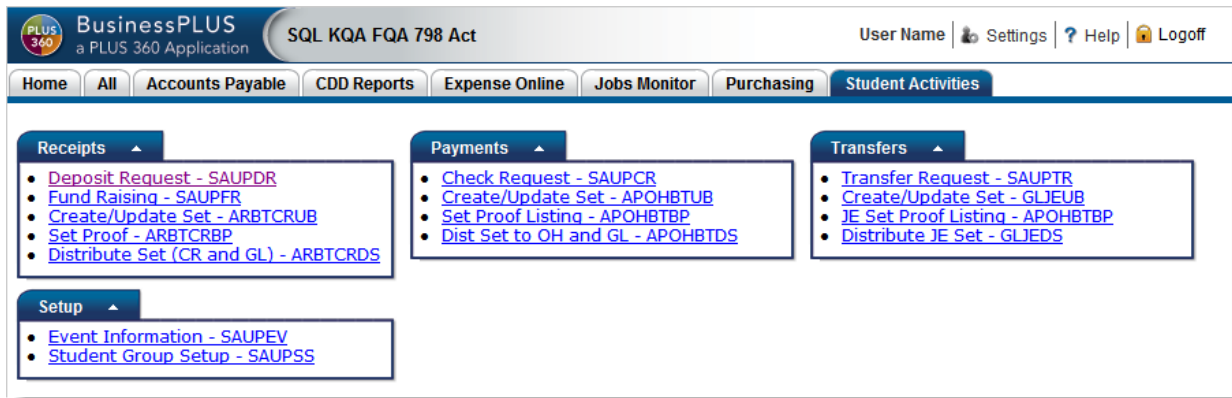
When pages are launched *from the BusinessPLUS Dashboard*, the Favorites defined on the active tab will be displayed on the page's side menu.
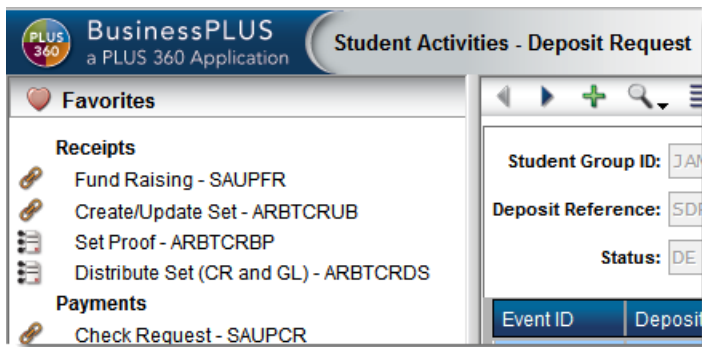
How to Add a Web Link

Click on the Folder icon to open.
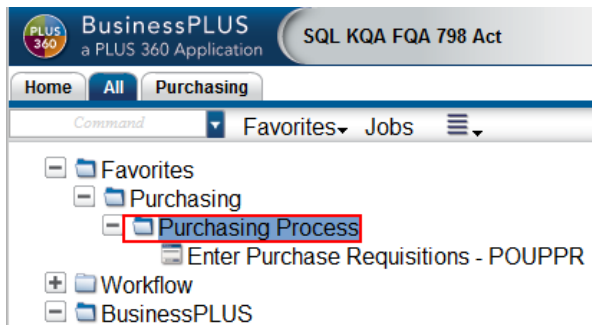
Click on the Favorites menu.
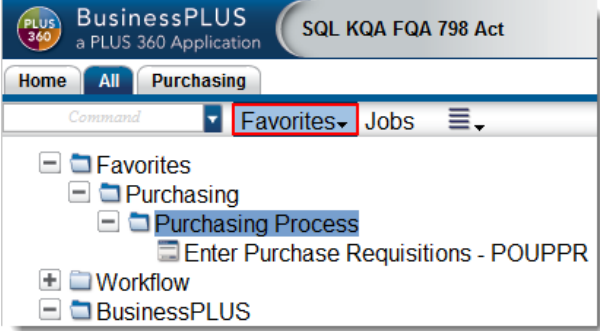
Click on New Web Link in '... '.
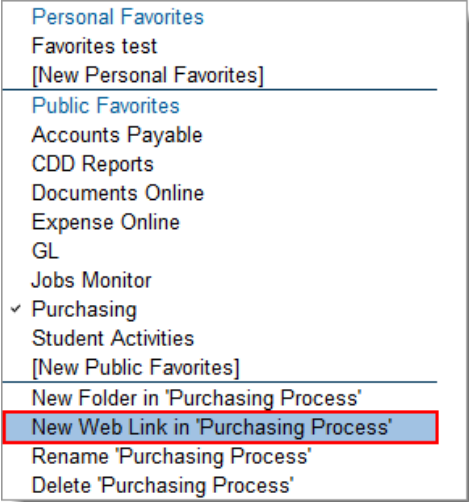
Type in the name of the Web Link.
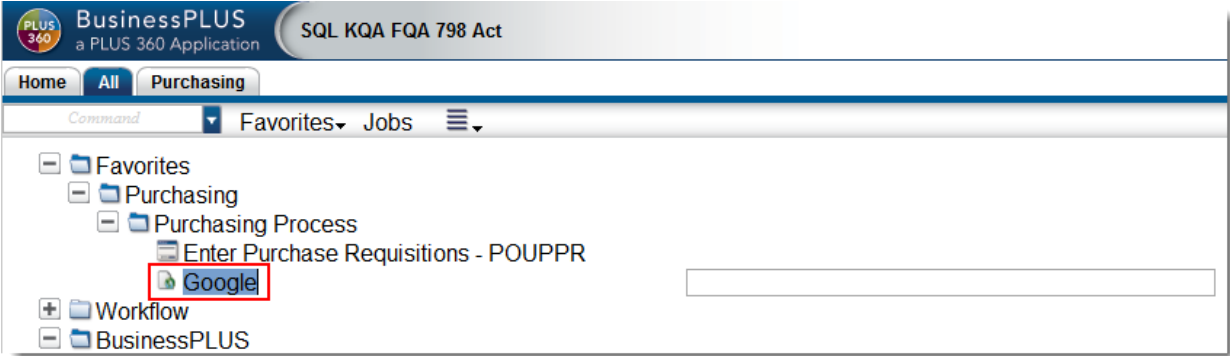
Press the tab key and type in the URL. When done press Enter or left-click the mouse to set the folder.
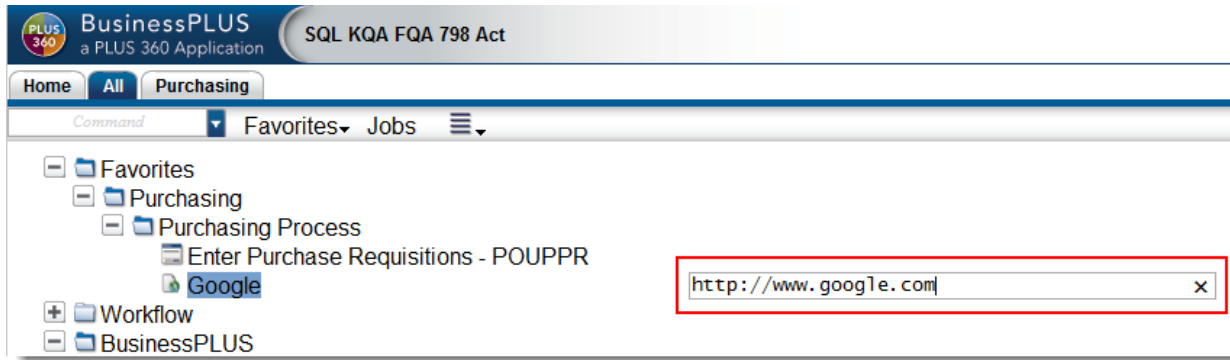
Adding a Favorite to the Dashboard Home Page

The example below illustrates how to add a Favorite that includes CDD reports to the Home tab in the Dashboard. A favorite called "CDD Reports" was created in the All tab, with a sub-folder named "reports". CDD reports were added by holding down the Ctrl key, clicking a report in the BusinessPLUS Reports folder, and copying/dragging it to the "reports" sub-folder.
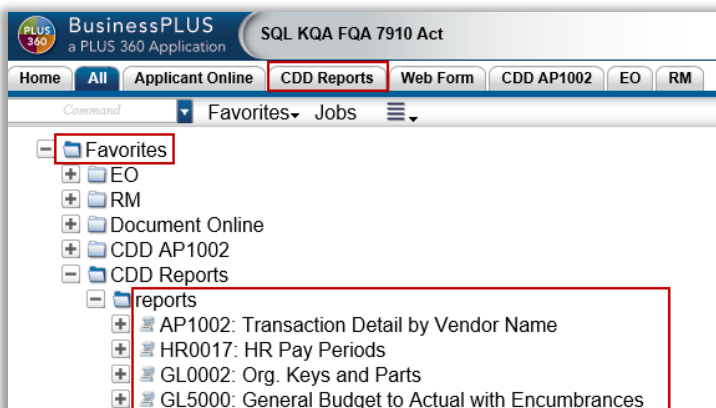
To add the "CDD Reports" Favorite to the Home tab, open the <server>/IFAS7/home/customize (Customize Dashboard) page. On the Homepage tab, Content page, either create a new content group, or update an existing content group (FINANCE, in this example) to add the Favorite:

- Enter a description ("CDD Reports" in this example)

- Add the following URL: ~/Home/Favorite.ascx

- In the Optional Parameter field, enter the <u>exact name</u> of the Favorite

- Set Type to "WebPart"
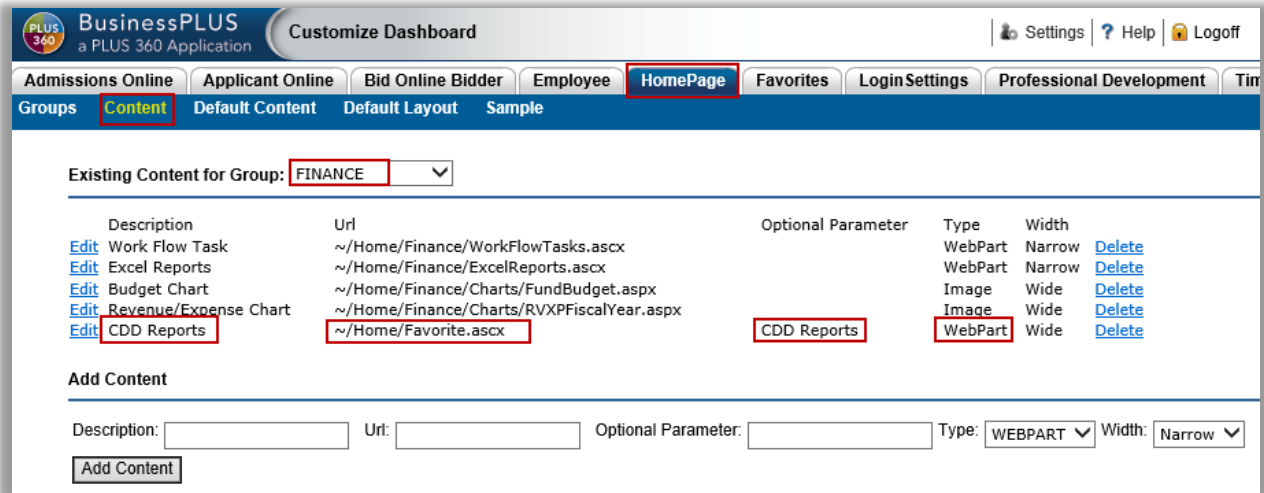
Go to the Dashboard Home tab, Change Content page. Select the "CDD reports" checkbox and save your selection.
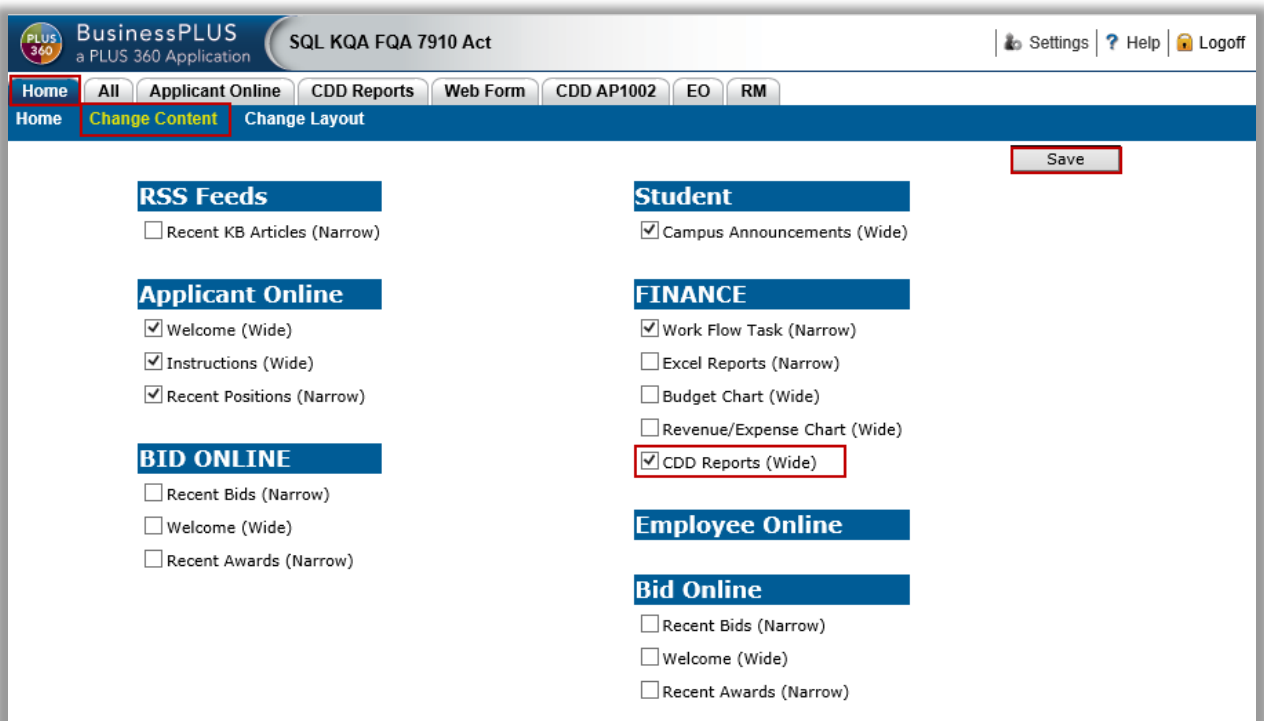
Refresh the Dashboard (F5). The Favorite is now added to the Home page with the CDD report links.

Workflow – Task List

If Workflow is used, there is an option to show Workflow and a Task List from the main menu. Through the Manage Users (NUUPUS) page, or via Admin console, the User ID record needs to have Workflow Enable set to anything other than <none> or N for the Workflow folder to appear in the user's All tab.
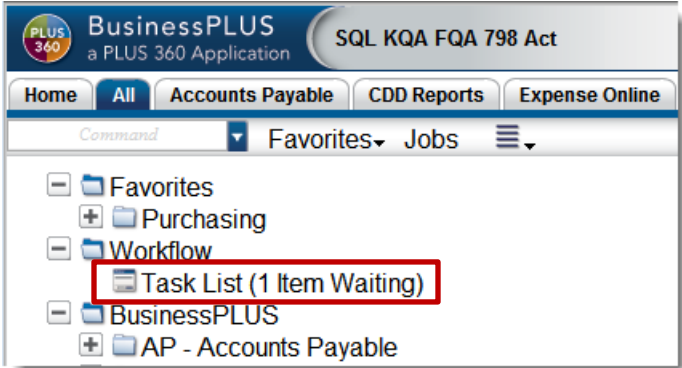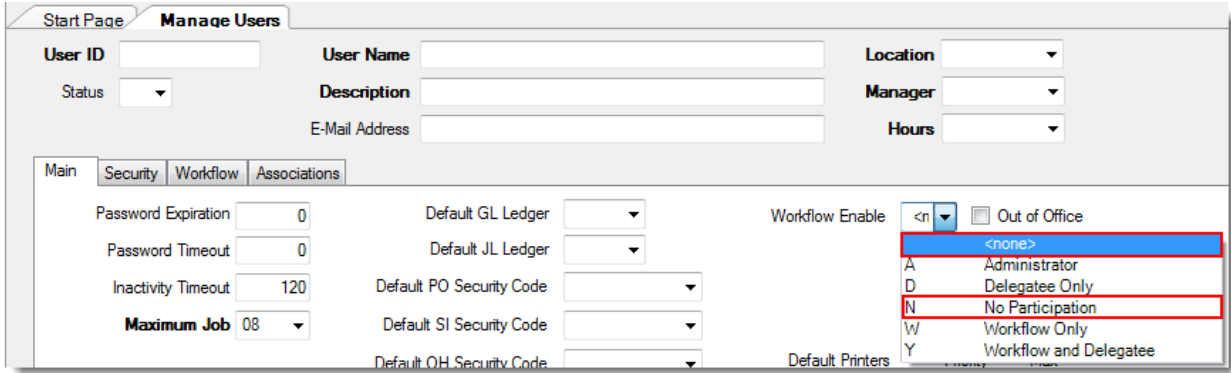
Click on Task List to see the detail of the item waiting.

Choose which record to approve or choose All Pending Tasks—even if only one record pending authorization. See the following message:
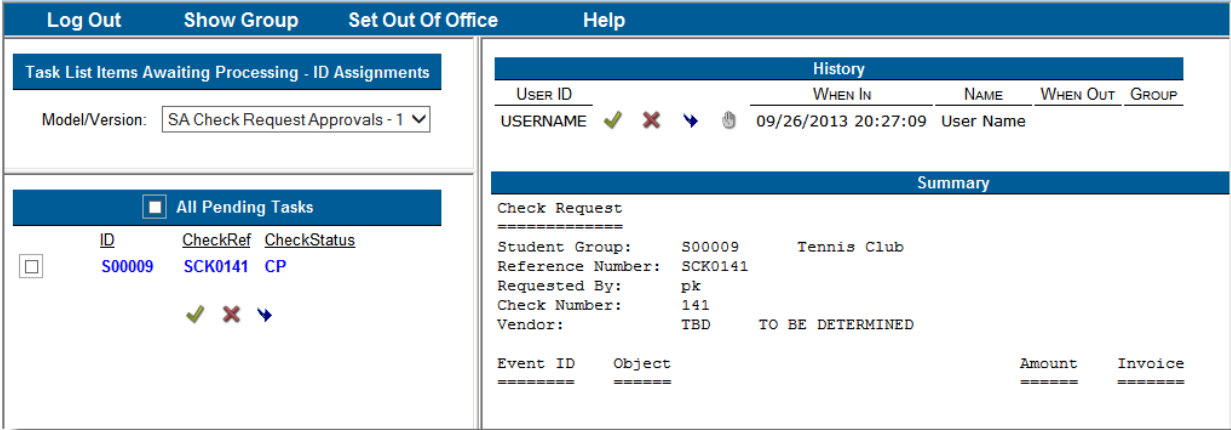
The user can Approve the item or Reassign to another user by selecting the box to the left of the pending task, and then clicking the blue arrow and selecting from the Choose Delegatee list that opens.
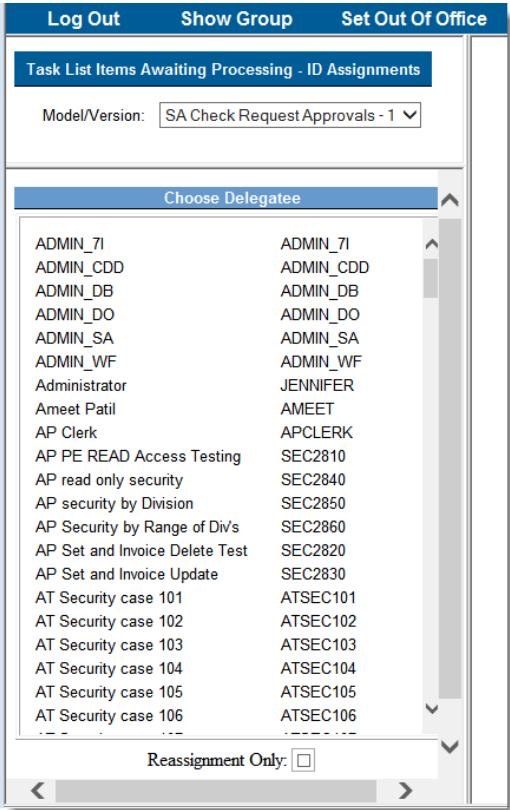
Threaded Notes

Most data entry pages include Threaded Notes references in the Attachments section of the side menu. With this feature, anyone can provide free form notes to any record in the system. The notes are organized by thread. For instance, on a particular purchase request, the purchasing agent may want to record notes they took during a discussions he had with a particular vendor on a particular topic. The topic would be considered the Thread, and each conversation could be recorded on a separate note. In addition, another thread on a different topic could be created, and related notes recorded. Show Attachments must be enabled on the Preferences tab. No additional setup is needed to configure whether or not Threaded Notes are available on any particular page. Threaded Notes can be reported on CDD reports.

Update Lock

By default, records updated via BusinessPLUS pages perform no record locking at the database level. If two users retrieve and update the same record, the last user to perform the update will have their changes committed to the database, and the first user's changes may be overwritten (depending on which columns are updated.)

To prevent this situation, an option has been added to the Nucleus Common Codes that restricts the update from occurring if another user has updated the record between retrieval and update. This option adds a restriction to the update statement that checks the last modification date/time of the record. If the record's modification date/time has changed between retrieval and update, the update attempt fails. The user is notified that the record has been modified between retrieval and update, and they are requested to refresh the record and try their update again.

Note: In some cases, the table being updated does not contain a column to store the record's last modification date/time. In this case, the update lock option compares every value that was originally retrieved with the record against every value that is currently stored in the database's record. If any values do not match, it is assumed another user has made changes to the record between retrieval and update.

To configure the update restriction, configure the NU Common Codes Category/Value of SY7I/UPDTLOCK. See the Common Codes Reference Manual for further information.

Custom Tab Order Setup

Setting up the Custom Tab Order and Field Defaults Definition file

Client defaults for page fields can be set for a page by including an xml file in the directory, <ifas7root>/Custom/screens/<moduleName>. The naming convention for the file is "<ScreenMask>TabOrderdefs.xml".

Activating the Custom Definitions

If this file exists for a page, then its settings can be activated by selecting the Options Menu drop-down "Tab Order". The first entry, labeled Default Tab Order, represents the basic tab behavior for the page, and there will be an entry for the new custom settings. An accelerator key, Ctrl+O (for Order), can be used to toggle between a Custom Tab Order and the Default Tab Order. This provides a quick way of getting into and out of a Custom Tab Order.

The Custom Definitions File

TabOrderdefs.xml format:

```
<sbixml>
    <TabOrderDefs>
    ① <TabOrderMask mask="<ScreenMask>" hasCustomDefs='Y' hasUserDefs='Y' >
        ② <TabOrderDef id="tab1" desc="Custom Definition" ifasUser="@">
            <Tabs>
            ③    <Tab elementId="<element name1>"  setRecordDefaults= "Y" firstElement="Y" />
                 <Tab elementId="<element name2>" />
            ④    <Tab elementId="<element name3>" defaultValue="11.00"/>
            ⑤    <Tab elementId="<element name4>" defaultValue="Y" forceDefault="Y" GlGr="GL"
GlKey="101201" GlObj="1301" JlGr="GL" JlKey="101211" JlObj="1311" Wo="4" Level="10"/>-->
            </Tabs>
            <RecordDefaults>
            ⑥    <Default elementId="<element name5>" defaultValue="<textval1>"/>
                 <Default elementId="<element name6>" defaultValue="<textval2>"/>
            </RecordDefaults>
        </TabOrderDef>
    </TabOrderMask>
    </TabOrderDefs>
</sbixml>
```

1. TabOrder Mask requires the mask name.
2. There may be more than one TabOrderDef's in the file. ID must start with a letter or number. Desc is the choice label you will see in the selections drop-down for each of the TabOrderDef's you set up. To set this tab order as the default tab order for this page, then set "default="1'" in the "TabOrderDef" line. E.g. <TabOrderDef id="_tab1" desc="Custom Definition" ifasUser="@" default="1">
3. Tabs – Start listing the order you want for the tabs. Element Name is the name of the field as found when viewing the page xml in BTLayout. "SetRecordDefaults = 'Y'" is optional, and turns on the set of record defaults below. (See #6 for explanation of RecordDefaults.) "firstElement = 'Y'" indicates the field that will have focus when the page is opened. Only one tab may have this setting.

4. DefaultValue is optional, and will appear in a field when the user tabs there from another field listed as a Tab element in this section.

5. An example of how to setup a default value for an Account Number field, with "defaultValue='Y'" and values for the parts. "ForceDefault='Y'" is optional, and indicates that this value should override any value already in the field.

6. RecordDefaults – each Default entry in this section specifies a default value for a field. All of these Defaults will appear at once when turned on by a Tab element above. (See #3 for an example of SetRecordDefaults.) Note: RecordDefaults must be fully tested before implementing, because they bypass normal validation rules on user entries.

Additional notes:

- The phone control, with its phone code and number is a special default case similar to Account Number field. Here is how to define a default phone number:
<Tab elementId="<BTPhoneControlName>" defaultValue="Y" PhoneCode="<code>" PhoneNumber="<number>".

- Once focus is on a field listed in the TabOrderDef, then the tab transitions will follow the order of the Tab elements listed after it. Any fields not listed in the TabOrderDef will follow normal tab transition for the page. To transition to a particular field not listed in TabOrderDef, add this tag to the Tab elementId of the field to tab from: 'nextElement = "<otherElementName>".'

Example TabOrderDef file that sets up just one TabOrderDef, which defines default values for fields and the first focus field, with normal tab transition for the page:

```
<?xml version="1.0" encoding="utf-8" ?>
<sbixml>
    <TabOrderDefs>
        <TabOrderMask mask="ARBTCRIC" >
            <TabOrderDef id="_tab1" desc="Suggested Defaults" ifasUser="@">
                <Tabs>
                    <Tab elementId="BTDirectCashCRController_Units_BTEditControl"  setRecordDefaults= "Y"
firstElement="Y" defaultValue="4"/>
                </Tabs>
                <RecordDefaults>
                    <Default elementId="BTComboBoxBankId"  defaultValue="94"/>
                        <Default elementId="BTEditControlAtTerm"  defaultValue="T"/>
                        <Default elementId="BTDirectCashCRController_Price_BTEditControl"  defaultValue="11.00"/>
                        <Default elementId="BTDirectCashCRController_Amount_BTEditControl"  defaultValue="11.00"/>
                        <Default elementId="BTDirectCashCRController_ProductID_BTEditControl"  defaultValue="123456"/>
                        <Default elementId="BTDirectCashCRController_Account_BTEditControl" defaultValue="Y"
forceDefault="Y" GlGr="GL" GlKey="200000" GlObj="6115" JlGr="" JlKey="" JlObj="" WO="" Level=""/>
                        <Default elementId="BTDirectCashCRController_Desc_BTEditControl"  defaultValue="notepads"/>
                        <Default elementId="BTDirectCashCRController_HitAR_BTCheckBox"  defaultValue="N"/>
                        <Default elementId="BTDirectCashCRController_Ref_BTEditControl"  defaultValue="123"/>
                        <Default elementId="BTDirectCashCRController_Div_BTComboBox"  defaultValue="DIV"/>
                        <Default elementId="BTDirectCashCRController_BankId_BTComboBox"  defaultValue="94"/>
                        <Default elementId="BTDirectCashCRController_SrcId_BTEditControl1"  defaultValue="456"/>
                        <Default elementId="BTDirectCashCRController_FinCd_BTEditControl" defaultValue="ANIMAL"/>
                </RecordDefaults>
            </TabOrderDef>
        </TabOrderMask>
    </TabOrderDefs>
</sbixml>
```

Example TabOrderDef file that defines several TabOrderDef's with various types of entries:

```
<sbixml>
  <TabOrderDefs>
```

```
      <TabOrderMask mask="ARBTCRIC" >
        <TabOrderDef id="_tab1" desc="Back Order Parking Tickets $7.00" ifasUser="@">
          <Tabs>
            <Tab elementId="BTDirectCashCRController_Desc_BTEditControl"  firstElement="Y" />
            <Tab elementId="BTDirectCashCRController_Price_BTEditControl"  />
            <Tab elementId="BTDirectCashCRController_Account_BTEditControl" defaultValue="Y" forceDefault="Y" GlGr="GL" GlKey="101201"
GlObj="1301" JlGr="GL" JlKey="101211" JlObj="1311" Wo="4" Level="10"/>-->
            <Tab elementId="BTPaymentCRController_Amt_BTEditControl" />
          </Tabs>
          <RecordDefaults>
          </RecordDefaults>
        </TabOrderDef>


        <TabOrderDef id="_tab2" desc="Back Order Parking Tickets" ifasUser="TOM">
          <Tabs>
            <Tab elementId="BTDirectCashCRController_Desc_BTEditControl"  setRecordDefaults= "Y" firstElement="Y" />
            <Tab elementId="BTDirectCashCRController_Price_BTEditControl"  />
            <Tab elementId="BTPaymentCRController_Amt_BTEditControl"  nextElement="BTDirectCashCRController_Desc_BTEditControl" />


            <Tab elementId="ARBirMasterCrippledDSC_Ref_BTEditControl"   />
          </Tabs>
          <RecordDefaults>
            <Default elementId="BTDirectCashCRController__FinCd_BTComboBox" defaultValue="PARKING"/>
            <Default elementId="BTPaymentCRController_Type_BTEditControl" defaultValue="CK"/>
          </RecordDefaults>
        </TabOrderDef>


        <TabOrderDef id="_tab3" desc="Back Order Water Payments" ifasUser="MARY">
          <Tabs>
            <Tab elementId="BTDirectCashCRController_Price_BTEditControl" firstElement="Y"  setRecordDefaults= "Y" />
            <Tab elementId="PeId" />
            <Tab elementId="BTPaymentCRController_Amt_BTEditControl"  />
          </Tabs>
          <RecordDefaults>
            <Default elementId="BTDirectCashCRController__FinCd_BTComboBox" defaultValue="FC01"/>
            <Default elementId="BTPaymentCRController_Type_BTEditControl" defaultValue="CK"/>
          </RecordDefaults>
        </TabOrderDef>
      </TabOrderMask>
    </TabOrderDefs>
</sbixml>
```