

My Fourth Shift Workplace Fourth Shift Release 8.0E

Fourth Shift Help
Release 8.0E

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My Fourth Shift Workplace

Overview

My Fourth Shift Workplace is a way of using your Fourth Shift system that takes advantage of using Internet-based technologies to generate and display the user interface of the Fourth Shift program. My Fourth Shift Workplace allows you to integrate Fourth Shift with your existing intranet or web-based resources. Both users and system administrators realize significant advantages in using My Fourth Shift Workplace including ease of use, simplified client setup and flexibility in work environments.

My Fourth Shift Workplace contains the following primary technologies:

- **Portals.** Portals are configurable views of your Fourth Shift data that can include the web-based version of the Fourth Shift program itself, as well as existing intranet resources, third-party browser-based applications, or even external Internet web sites. See "Using Fourth Shift Portals" in this manual for more information on creating and updating portal definitions.
- **Fourth Shift WebUI.** Fourth Shift WebUI provides a web-like look for the Fourth Shift program. This user interface style is similar to the traditional Fourth Shift program, enhanced to operate in the way users expect web-based software to operate.
- **Connectivity Toolkit.** The Connectivity Toolkit is a collection of browser-based customization tools for Fourth Shift WebUI. It enables advanced users and script programmers to tailor Fourth Shift WebUI to the unique needs of each user.

Although no special client setup process is required, My Fourth Shift Workplace requires Microsoft Internet Explorer. On the server, My Fourth Shift Workplace uses Microsoft Internet Information Server to generate web pages that provide the functionality of the traditional Fourth Shift program.

This section contains both background information about My Fourth Shift Workplace and information about configuring your environment. There are some basic concepts you should understand before you begin. For more information on these concepts, see "Using My Fourth Shift Workplace" in the Fourth Shift Basics online manual.

Requirements

This documentation assumes you have met the following requirements.

Knowledge Requirements

My Fourth Shift Workplace relies on a number of technologies that may not be familiar to you. This documentation assumes that you have basic understanding in a number of areas, including:

- **Windows system administration** including creating users, groups, assigning security and creating mapped drives to other servers. You also need to understand the relationships of these users to your domains.
- **Fourth Shift system administration** including creating users, assigning security, using the FS.CFG file, installing the Fourth Shift client components and running the Fourth Shift database processes as applicable.
- **SQL Server system administration**, including backup of the My Fourth Shift Workplace database and the Connectivity Toolkit UI database.
- **Microsoft Internet Information Server (IIS) basic operation and system administration** including running the Internet Services Manager as well as installing and administering firewall technology.

If you are not familiar with these technologies, read the online documentation and supplemental printed resources, or complete training classes to acquire the necessary knowledge before you begin. A clear understanding of these technologies will enable you to reduce the implementation time and effort.

Server Requirements

Install My Fourth Shift Workplace on a server that can access the Fourth Shift database server using a mapped drive like any traditional Fourth Shift client.

Note: The Portal manager module of My Fourth Shift Workplace uses an SQL server database to store its data. This database can be stored on any default instance of SQL Server on the network, including a local free copy of SQL Server Express.

The optional module Connectivity Toolkit, *must* have a Locally installed default instance of SQL Server to store its database FSUIENU. This can be a free copy of SQL Server Express.

The server used for My Fourth Shift Workplace must:

- be running a supported version of Microsoft Windows Server according to the Fourth Shift Release Notes.
- be running Microsoft Internet Information Services (IIS).
- be running a supported version of Microsoft Internet Explorer according to the Fourth Shift Release Notes.
- have a drive mapped to the Fourth Shift database server like any traditional client accessing the system.

If you need more information about these requirements, please consult your Windows server documentation.

Client Access Requirements

Clients can access My Fourth Shift Workplace through your LAN or across the Internet. In either case, the following are required:

- A supported version of Microsoft Internet Explorer according to the Fourth Shift Release Notes.
- Ability to access the URL address of the My Fourth Shift Workplace server either through the LAN or across the Internet. Domain name services must be properly set up in order for the client to access the URL address.

There are numerous ways to allow your users to connect to the Internet. This documentation does not outline these methods.

Architecture

The architecture of My Fourth Shift Workplace allows users to complete transactions through a browser while working within your local network or remotely through the Internet. The underlying application for My Fourth Shift Workplace runs as a web site on a standard IIS web server. From the web server, connections to the Fourth Shift server are made.

In addition, the architecture supports users running the traditional LAN-based architecture, Net UI clients and My Fourth Shift Workplace clients at the same time. This allows you to select the most appropriate access method for each user.

My Fourth Shift Workplace Web Server

The web server runs the "web site" that makes My Fourth Shift Workplace operate. The My Fourth Shift Workplace installation completes a series of web server setup steps such as installing the files and defining the web site. From a Fourth Shift standpoint, this server is treated like a traditional Fourth Shift LAN client.

This server manages the individual user sessions accessing Fourth Shift. Traffic expectations should be considered as you select and set up this server. For example, if you expect a large number of users to access through the web server, consider using dedicated servers and higher performance servers.

Users access this server by entering the URL address specific to the web site created for My Fourth Shift Workplace. For example, <http://FSWebServer.company.com/fsportals>.

Fourth Shift Database Server

Your Fourth Shift system is usually run on a server with your database manager, related files, supplemental data, and support programs. No additional installation from the My Fourth Shift Workplace installation media is needed on the Fourth Shift server to support My Fourth Shift Workplace.

My Fourth Shift Workplace Internet Users

Internet users are generally considered remote users. Using some connection method, such as through an ISP (Internet Service Provider), users connect to the Internet so that the URL address entered can be located. To start Fourth Shift, users open Internet Explorer and enter the address for the server where the My Fourth Shift Workplace web site is running. Standard Internet data encryption security standards can be utilized.

My Fourth Shift Workplace LAN Users

My Fourth Shift Workplace LAN users can access URL addresses within the local area network. For example, they can access a corporate intranet even if they cannot access another site outside of their network. LAN users are not required to have access to the Internet if the URL address needed for My Fourth Shift Workplace is already part of their LAN.

Traditional Fourth Shift User

Traditional Fourth Shift program users are set up using the standard Fourth Shift installation program. Folders and shortcuts are created on the Microsoft Windows Start Menu to provide access to Fourth Shift. An Internet browser is not used to access the Fourth Shift Windows-based programs.

Net UI Users

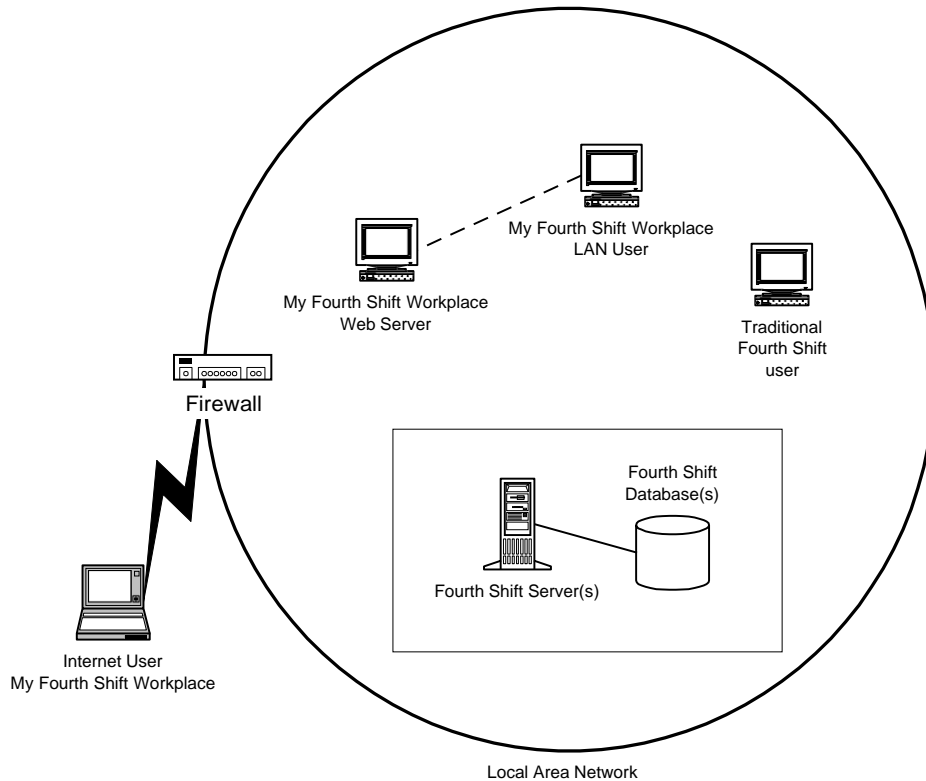
Net UI users can access Fourth Shift using a number of different thin-client options such as using the Internet or dial-up connection. Folders and shortcuts are created on the desktop to provide access to Fourth Shift. A supplemental process is run on the Fourth Shift server to provide Net UI users with the opportunity to create a connection to Fourth Shift.

The primary difference between Net UI and WebUI is that WebUI provides an enhanced user interface that takes advantage of the Internet Browser and NetUI uses the same user interface used by the traditional Fourth Shift program. These two are the same in that the Fourth Shift application sessions will be run on the application server.

See the Net UI manual for more information.

Environment Example

Your environment could look similar to the following:



This is a fairly simple configuration example, including two servers and using a firewall for network security. There are many more configurations possible when installing My Fourth Shift Workplace. Be sure to consider the following suggestions and recommendations when deciding on the best configuration for your business. Some of these considerations overlap, and all must be considered before implementation.

Number of Servers

Your configuration can utilize a single server for all the required components, or you can install different components on different servers. The primary consideration when you are determining how many servers to use is network communication. That is, the communication between the My Fourth Shift Workplace Web server and the Fourth Shift server.

A single server with all Fourth Shift and Workplace components installed does not have to communicate over the network. This can improve performance if the server is powerful enough. If, however, the server machine can not support the required number of users, using a single server may in fact slow down processing time.

When deciding how many server machines to use, use the following software requirements to ensure all servers are running the necessary software components.

This component...	Requires this environment
My Fourth Shift Workplace (FS Portals)	Microsoft Windows Server Microsoft IIS .Net Framework

This component...	Requires this environment
Terminal Services (optional)	Microsoft Windows Server Microsoft IIS
Fourth Shift database server	Microsoft Windows Server Microsoft SQL Server
Fourth Shift (module) server	Microsoft Windows Server .Net Framework

Firewall Considerations

Using a firewall to protect your internal network is strongly recommended. Implementing a firewall is one of the most common and effective ways to protect your internal network.

When using a firewall, you should also use an internal DNS server rather than using an external ISP for your DNS resolution services. An internal DNS server eliminates the need to communicate outside the firewall to resolve machine names and IP addresses. This improves overall performance.

Hardware Recommendations

Hardware recommendations for My Fourth Shift Workplace vary based on the number of components installed on the server(s). The latest hardware recommendations are listed on the Fourth Shift Customer Support Bulletin Board. You can also contact the Technical Support group through Fourth Shift Customer Support for specific recommendations for your system.

Client Operation

My Fourth Shift Workplace clients are different from traditional clients in a number of ways:

- **Installation Process.** No installation is needed for My Fourth Shift Workplace clients. Once My Fourth Shift Workplace is installed on the web server, users can access the URL and begin using the system immediately.

Depending on the types of reports that need to be generated on the client, you may need to supply supplemental files, including the Fourth Shift Report Viewer, to some users. For more information, see "Workstation Setup Considerations" in the System Administration online manual.

- **Client Connection.** My Fourth Shift Workplace clients communicate with the My Fourth Shift Workplace web server the same way users communicate with other web sites. The client connection is also similar to the communication methods used with Net UI clients (TCP/IP).
- **Data Communication.** The My Fourth Shift Workplace web server uses traditional Fourth Shift client programs to connect to Fourth Shift, access data and complete transactions. Unique identifiers associated with each internet session are used to determine the number of user licenses active because of My Fourth Shift Workplace sessions. Users can have more than one Fourth Shift frame open and still use only one Fourth Shift user license.

Security

System security must be carefully considered when using My Fourth Shift Workplace. The following security issues and suggestions should be considered:

- If you allow My Fourth Shift Workplace client access over the Internet, your Fourth Shift server should be located inside a firewall in order to prevent unauthorized access to the system.
- Local network clients use the local area network security implemented in your company. Be sure you have defined the necessary network security to support intranet user access.
- The My Fourth Shift Workplace web server requires that port 80 be opened through the firewall just as typical web servers require if you want to enable Internet access.
Note: You can install My Fourth Shift Workplace on a web server using a port other than 80, which should be opened through the firewall as well.
- During My Fourth Shift Workplace installation, the challenge / response security option is selected. Users must have valid Windows network user security to be allowed access to the site.
- Clients accessing Fourth Shift through My Fourth Shift Workplace continue to be required to enter Fourth Shift system user identification and password.

There are additional security considerations associated with using portals. See "Using Fourth Shift Portals" for more information.

Restricted Features

My Fourth Shift Workplace contains the WebUI feature, which provides the core Fourth Shift program functionality. However, several modules and features are not supported directly through WebUI, though all of these can be accessed through My Fourth Shift Workplace using a Windows Terminal Server frame.

Modules or Features Not Available with WebUI

Several modules do not take advantage of the WebUI features. To be accessed from My Fourth Shift Workplace, these modules must be operated in a special type of frame called a Windows Terminal Server frame.

Modules

The following modules and features are accessible only through Windows Terminal Server frames in My Fourth Shift Workplace:

- Engineering (ENGM) Module
- Manufacturing Analysis (MMAM) Module
- Rules Based Pricing (RBPM) Module
- Sales Order Processing (SOPM) Module
- Shop Floor Tracking and Reporting (SFRM) Module
- Complementary applications

In order to use these modules and features from a remote client, you may also consider using other remote client options like Windows Terminal Server (WTS) or Citrix. Contact Fourth Shift Client Business Solutions for more information about this software, and see "Running Microsoft Windows-based Applications in a Portal" for more information.

Printing Options

Fourth Shift generates several types of reports. In WebUI, reports are usually displayed in a browser preview window, from which they can be printed and saved. When using WebUI, consider the following as you generate reports:

- **Screen Reports.** Screen reports can be generated by choosing **Preview** or **Print** from the **Reports** menu. Reports are previewed in the web browser.
- **Batch Process Reports.** When a batch process runs, reports are generated either to a file on the Fourth Shift server (**Report Destination** = 2) or previewed in the browser (**Report Destination** = 1). Once displayed, the user can choose to print the report or save it to a file. If the user wishes to use the report file generated (**Report Destination** = 2), the file must be transferred to the user's computer through a LAN or dial-up connection after the processing is complete.

DOS Commands and Batch Programs

WebUI clients can not run DOS or other commands using the CMND (DOS Command Shell) or PROG (Fourth Shift Program Execution) tasks.

If a batch process includes either of these tasks, all tasks up to the unavailable task are executed. When an unavailable task is encountered, a message is displayed indicating the reason for the failure.

Use the BSET screen to review the batch processes that contain the CMND and PROG tasks. If you need to complete batch processes that contain CMND or PROG tasks, use a traditional Fourth Shift client or a Windows Terminal Server frame within My Fourth Shift Workplace.

Online Documentation

Online documentation is provided in these formats from the screen you are using:

- **Context-sensitive help.** Click the **Help** menu and select **Screen Help** to open the help file for that screen.
- **Field option definitions.** Click the **Help** menu and select **Field Action** to list the options for a specific field's drop-down menu.
- **Online printable manuals.** Click the **Help** menu and select the **Print Library** button to open the list of help manuals in PDF format. These are printable versions of the context-sensitive module help files and the reference guides.

Using My Fourth Shift Workplace

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

Overview

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

What Makes up My Fourth Shift Workplace

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

Portals

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

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

See [Using Fourth Shift Portals](#) in this online manual for more information on creating and updating portal definitions.

Fourth Shift WebUI

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

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

My Fourth Shift Workplace Concepts

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

Portals

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

Links

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

Workflow

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

- **One-Step method.** There is only one step within the transaction process. For example, a transaction is completed on one screen and you do not need to go to another screen to complete the process.
- **Multiple-Step method.** Several steps are involved in the transaction process sequence. For example, transactions are entered on one screen, applied on another and completed on yet another screen. You can use the **Next Step** icon to go through the sequence in the transaction process.

Getting Started

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

Accessing My Fourth Shift Workplace

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

Navigating around Fourth Shift WebUI

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

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

Function Field

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

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

Tabs

Tabs are available when a screen has additional related or required information for a transaction. Tabs are always shown, even if you cannot access them based on the data on your screen. For

example, from the MOAN (**Planner Action**) screen, you can see the **Material Shortages Detail** tab. But, if the item you are viewing doesn't have any material shortages, you cannot access the tab even though you can see it.

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

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

Links

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

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

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

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

Next Step Icon

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

- The *Next Step* sequence is based on the "Typical Work Flows" diagrams in the *Getting Started* manual.
- The *Next Step* sequence for each screen is listed on the **Features** tab when you select *Screen Help* from the **Help** menu.

Back Icon

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

- The **Back** icon enables you to return to what you were doing without having to remember exactly what screen you were on.
- The **Back** icon in My Fourth Shift Workplace works similar to the **Back** button in Internet Explorer, but it is specific to what you were doing in a specific Fourth Shift WebUI frame. Do not use the Internet Explorer Back button.

Entering and Viewing Data

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

Selecting an Option in a Field with a Selection List

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

Selecting a Row

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

- **Blue Highlighted Background**
The current line has a blue background color. You can move the selection with the mouse or the keyboard arrow keys.
- **Selecting a Line**
 - Clicking on a line in the detail grid of a main panel moves your cursor to that row.
 - Clicking on a line in a pop-up or browser window selects the row and returns the row to the parent screen.
- **No line marker**
Some pop-up and browser windows do not contain the arrow markers but you can still select from these windows.
 - Select a row to return to the parent screen whenever the hand cursor is displayed.

Using the Date Picker

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

- Press Ctrl+Home to return to the current date.
- Click the Today button to select the current date, which closes the Date Picker window and moves the cursor to the field with the selected date.
- Click outside the Date Picker window to exit the Date Picker.

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

Refreshing Data

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

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

Saving Data

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

Using Shortcut Keys for My Fourth Shift Workplace

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

My Fourth Shift Workplace keyboard support includes the following:

Entering and Editing Text

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

Moving Within a Screen

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

Moving Between Tabs on a Page

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

Moving Between Screens

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

Using Menus

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

Using Special Features

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

Installing and Updating My Fourth Shift Workplace

The My Fourth Shift Workplace installation is completed entirely on the web server that will be used to host the site. A separate ISO image and installation program are provided for this process.

During the My Fourth Shift Workplace installation, or upgrade, the portals database will be updated using a trusted connection to access the database. The network login ID used to complete the installation must have sufficient rights to create tables, alter tables, and grant security permissions in the portals database.

Overview of Installation Process

Based on the module access key information stored in your Fourth Shift database, the Fourth Shift Portals, Fourth Shift WebUI, or Connectivity Toolkit components are available for installation. The installation process:

- Creates the FSPortals, FSChart and FSWebUI directories as web sites on the Web server in the INetPub\WWWRoot directory. The FSUIEditor directory is also created if the Connectivity Toolkit is also installed. It is important that these directories exist on the same web server.
- Completes the installation steps normally completed during a standard Fourth Shift client installation. This includes installing files, defining registry entries and creating desktop shortcuts. The installation program requires a mapped drive to your Fourth Shift configuration file.
- Establishes a series of IIS settings that are used by My Fourth Shift Workplace. These settings should not be changed unless advised by Fourth Shift Customer Support. See "Default IIS Settings" in the **Administering My Fourth Shift Workplace** section of this manual for the list of default values.

New Install: Server Installation Instructions

Installation for My Fourth Shift Workplace includes installing the components on an Internet server. This Internet server is usually on the same local area network as the Fourth Shift database server, and is used for My Fourth Shift Workplace. See the [Architecture](#) topic in the WebUI [Overview](#) for more information.

Implementing Client/Server Security

Fourth Shift does not provide its own encrypted text security for data passed between the IIS server and a workstation using My Fourth Shift Workplace. In order to be more open-application compliant, we have taken advantage of the built-in encryption protocol included between IIS and Internet Explorer.

To implement this encryption, you must purchase an encryption certificate from a certified security provider or write a private encryption certificate. Fourth Shift has tested My Fourth Shift Workplace with VeriSign Corporation certificates and has not found any compatibility issues.

Fourth Shift strongly recommends that you implement encryption for any critical communication passing outside your secure LAN environment, especially if this communication passes over the Internet.

Verifying the Supplemental Software Installation

Verify that the required software is installed on the appropriate computer. My Fourth Shift Workplace requires the following supplemental software:

Computer	Software
My Fourth Shift Workplace Server	Microsoft .NET 3.5 SP1 Microsoft Internet Information Server (IIS) Microsoft Internet Explorer 11
My Fourth Shift Workplace Client	Microsoft Internet Explorer 11

Installing My Fourth Shift Workplace on Internet Information Server (IIS)

My Fourth Shift Workplace is installed on an Internet server using its own setup program.

IIS for My Fourth Shift Workplace

If you are using My Fourth Shift Workplace, you must make sure that certain role services are installed. To install the Web Server (IIS) role services, do the following:

1. From Control Panel > Administrative Tools, open **Server Manager**.
2. Go to **Manage > Add Roles and Features**. If the **Before You Begin** page is displayed, click **Next**.
3. Choose **Role-based or Feature-based installation**. Click **Next**.
4. Select the server from the Server pool. Click **Next**.
5. On the **Server Roles** page, select **Web Server (IIS)**. If it was already selected, skip to step 8.
6. On the pop-up window for **Add Roles and Features Wizard**, click the **Add Features** button. On the **Select Features** screen, click **Next**.
7. On the **Web Server Role (IIS)** page, click **Next**.
8. Make sure at least the following role services are checked:
 - Common HTTP Features
 - Default Document
 - Directory Browsing
 - HTTP Errors
 - Static Content
 - Application Development
 - .NET Extensibility 3.5
 - .NET Extensibility 4.5 or 4.6
 - ASP
 - ASP .NET 3.5
 - ASP.NET 4.5 or 4.6
 - ISAPI Extensions
 - ISAPI Filters

- Health and Diagnostics
 - HTTP Logging
- Security
 - Windows Authentication
- Management Tools
 - IIS 6 Management Compatibility
 - IIS 6 Metabase Compatibility
 - IIS Management Scripts and Tools

9. Click **Next**.

10. If you made any changes, click **Install**. Otherwise click **Cancel**.

11. If the **Installation Results** page indicates that the installation succeeded, click **Close**.

12. Exit Server Manager.

WebUI Windows Account

The WebUI Windows Account is a Windows user login that will be used by WebUI. This is needed because many users can start WebUI sessions, but a single identity is used to set their permissions. All WebUI processes and customizations will impersonate this user when accessing the system.

The WebUI Windows Account will be used for:

1. WebUI application sessions. WebUI will immediately impersonate this user when it starts an application session. This will be setup automatically by the Workplace Server installation.
2. WebUI Finders. The WebUI Finders will impersonate this user when they browse the database. This will be setup automatically by the Workplace Server installation. If you wish to modify the WebUI Windows account after Workplace is installed, the Windows Internet Information Server utility can be used to change the identity of the FSWpAppPool application pool.
3. Fourth Shift database. Since the WebUI processes run as this user, the WebUI Menu Explorer and the WebUI Finders connect to the database as this user and therefore need appropriate database access permissions set up. To accomplish this, assign the WebUI Windows Account user to the FSUSER role in the Fourth Shift database by performing the following steps:
 - a. Open SQL Server Management Studio and **Connect** to the Database Engine.
 - b. Go to **Databases > FSDBXX > Security > Users**.
 - c. Right-click **Users**, click **New User...**
 - d. If there is an Add button, click **Add...**
 - e. Enter a User name.
 - f. After Login name, click ...
 - g. Enter the user name, click **Check Names**.
 - h. Select the User Name, click **OK**.
 - i. Click **OK** on the **Select Login** window.
 - j. On the **Database User - New** screen, click **Membership** page.

- k. Select FSUSER, and click **OK**.

You will be asked to identify the WebUI Windows Account when performing the Workplace Server installation.

If you wish to modify the WebUI Window account after Workplace is installed, run the Workplace Server installation in repair mode, specifying a new account when prompted. Alternatively, the account can be updated in IIS Manager by updating the FSWPAppPool identity, and the physical path credentials for FSChart, FSPortals, and FSWebUI. Also, make sure that the account specified has access to the FSDBXX and, if applicable, FSUIENU databases.

Choosing Login for Installation

When completing the installation, use the user name that you want to become the main portal administrator and the one you will use to log into the server when My Fourth Shift Workplace sessions are running. This guarantees that the installation program sets up the correct user profile. This is especially important when the server is a Windows Terminal Server, because each user is assigned a different Windows directory.

The user login used during installation of My Fourth Shift Workplace will become the default portal administrator login, which allows access to all administrative features for My Fourth Shift Workplace and Connectivity Toolkit.

Installing My Fourth Shift Workplace

1. Go to the My Fourth Shift Workplace server.
2. Restarting the server is recommended to clear memory fragmentation.
3. Ensure that the drive letter for your Fourth Shift system is mapped to the appropriate share name on your Fourth Shift server.
4. If the Fourth Shift client workstation is not yet installed, follow the Workstation Preparation and Workstation Installation sections of the Installing Fourth Shift manual.
5. Copy the Workplace Plus installation image (ISO file) for this release onto the local hard drive in a temporary folder.
6. From the root of the Workplace Plus installation folder, double-click **FSWorkplaceSetup**.
7. If you are prompted to install pending requirements, click **Install**. If you are asked if you want FSWorkplaceSetup to make changes to this computer, click **Yes**. Wait for the components to be installed.
8. On the **Welcome** screen, click **Next**. The **Locate Configuration File** screen is displayed.
9. Browse for the Fourth Shift **Configuration File** (for example, *M:\Mfgsys\FS.CFG*).
10. Click **Next**. The **WebUI Windows Account Configuration** screen is displayed.
11. Enter the domain user (in *domain\user* or *user@domain* format) and password for which WebUI applications can run to gain access to the Fourth Shift database, as described in the **WebUI Windows Account** section above.
12. Click **Next**. The **Database Server** screen is displayed.
13. Enter the following information:
 - a. **Database server** name (with Instance Name, if applicable) for your FSWorkplace database
 - b. SQL Server Administrator **Login ID** (sa)
 - c. **Password**
 - d. Check **Create new database** if you do not already have an FSWorkplace database.

14. Click **Next**. The **Encryption Warning** message is displayed.
15. Read the encryption warning, check to **accept responsibility for encryption considerations**, and click **Next**. The **Serial Number and Module Access Key** screen is displayed.
16. Confirm your serial number, browse for your key file if necessary, and click **Next**. The **Custom Setup** screen is displayed.
17. Select the features to be installed, and click **Next**.
18. If Connectivity Toolkit was selected, the **Connectivity Toolkit Instance** screen is displayed.
19. Enter the sa **Password**, select the **Local SQL Server Instance**, and click **Next**. Note that the Connectivity Toolkit database must be on the local Workplace server. The **Ready to Install** screen is displayed.
20. Click **Install**.
21. If you are asked if you want to allow the program to make changes to this computer, click **Yes**.
22. When the **InstallShield Wizard Complete** screen appears, check to **Show the readme file** and **Show the Windows Installer log**, and click **Finish**.
23. Review and close the FSWP_README file and the FS Workplace installation history log file.
Note: If any errors are detected in the log file, contact Customer Support.
24. If you are prompted to restart your system, click **Yes**, and log back into the server when prompted.
25. Using Windows Server Manager, turn off Internet Explorer Enhanced Security Configuration (IE ESC) for both Administrators and Users.

Configuring My Fourth Shift Workplace on a Separate Server

As of release 8.00E the configuration of Workplace on a separate server is significantly simplified. All that needs to be ensured is that the account specified as the WebUI account has the proper drive mapping to the Fourth Shift server, and includes the Mfgsys\System directory in the system path. Logging in with the WebUI account specified during the Workplace Server installation before performing the required Workstation installation process on the Workplace server is a good way to ensure these are configured.

It is no longer necessary for the path to the Mfgsys\System directory under the Fourth Shift server share to be included in the system path as a UNC, but rather only as a directory on the mapped drive, as configured by the Workstation installation. And it is no longer necessary to keep any account logged in on the Workplace server in order to access the mapped drive.

Modifying My Fourth Shift Workplace Information

Before accessing any portals using a My Fourth Shift Workplace client, complete the following steps on the My Fourth Shift Workplace server.

Note: You may need to first setup Internet Explorer security for the web site on the local intranet, see [Setting Up Local Intranet](#) under [Client Configuration](#).

1. Open the Internet Explorer browser and navigate to <http://localhost/fsportals>; login if requested.
2. Click the **Preferences** link in the portal bar on the upper-right side of the **My Fourth Shift Workplace** *welcome* screen.

The **Edit Preferences Portals** window is displayed.

3. Click **Locations ...**

The **Edit Known Locations** window is displayed.

4. Select [*FS Portals Server*] from the **Defined Locations** list.

5. Change the **Location Name**, if desired.

You may consider adding the system name of the Fourth Shift system to the beginning of the **Location Name**.

Note: Add a hyphen after the system name for readability.

6. Change the Location URL if you have changed servers for My Fourth Shift Workplace.

7. Enter the **Configuration File** location for the system you want to use, for example, *M:\mfgsys\fs.cfg* (for a single server configuration) or *\\FSservername\FSHIFT\mfgsys\fswp.cfg* (for a separate server configuration).

8. Verify the **Supported Frame Types** options.

9. Click **Update** to update this location in the FSWorkplace database.

10. Click **Close** on the **Information** window.

11. Click **Close** on the **Edit Known Locations** window.

12. Close the **Preferences** Internet Explorer tab.

Client Configuration

While there is no setup program that needs to be run on a workstation that is a My Fourth Shift Workplace client, you may want to complete these configuration steps once on each client to make daily connections easier.

Setting Up Local Intranet

The Local Intranet zone must be set up for each My Fourth Shift Workplace client to allow access to the My Fourth Shift Workplace server.

1. Go to the **My Fourth Shift Workplace** client.

2. Open **Internet Explorer**.

Run Internet Explorer as **Administrator**. If you get a message asking if you want the following program to make changes to this computer, click **Yes**.

3. From the **Tools** menu, choose **Internet Options**.

4. Select the **Security** tab.

5. Click the icon for the zone you want to use (either **Local Intranet** or **Trusted Sites**).

6. Click the **Sites** button.

7. If available, click the **Advanced** button.

8. Enter the **URL address** for the IIS server.

For example: *http://ServerName.DomainName*.

9. Do one of the following to verify that the **Require server verification [https:] for all sites in this zone** is set appropriately for the server:

- If the server uses an SSL certificate, select the check box.

- If the server does not use an SSL certificate, *do not* select the check box.
 10. Click **Add**.
 11. Click **Close**. If the Local Intranet window is shown, click **OK**.

If you are **not** using an SSL certificate on your server, complete the following steps:

 - a. Uncheck the **Enable Protected Mode** check box.
 - b. Click **Custom Level...**
 - c. Set **Submit nonencrypted form data** to enabled, in the **Miscellaneous** section.
 - d. Select **Automated logon with current user name and password**, in the **User Authentication** section, if you do not want your users to log in every time they access My Fourth Shift Workplace.
 - e. Click **OK**. If prompted to change settings for this zone, click **Yes**.
 - f. Click **OK** to close **Internet Options**. If a warning message appears, click **OK**.
 12. If you use the Local Intranet Zone:
 - a. Click **Compatibility View Settings** from the Tools menu.
 - b. Make sure that **Display Intranet Sites in Compatibility View** is not selected.
 - c. Click **Close**.
 13. Close Internet Explorer.
 14. Repeat these steps on each My Fourth Shift Workplace client.

Security Configuration

The following steps must be completed on remote workstation for Internet Explorer.

1. Go to the remote workstation, You may need to be logged on as the **administrator** on the computer to complete this process.
2. Start Microsoft Internet Explorer (Run as administrator). if you get a message asking if you want to allow the program to make changes to this computer, Click **Yes**
3. From the **Tools** menu, choose **Internet Options**.
4. Choose the **Security** tab.
5. For the zone, select the **Local Intranet**
6. Click the **Sites** button.
7. Click **Advanced** on the **Local Intranet** window.
8. Enter the website URL for the Fourth Shift web server. For example, you might enter:
http://Server1.MyCompany.com/FSWeb
9. Click the **Add** button.
10. Click **Close** to exit the Local intranet window.
11. If the **Local intranet** window is displayed, click **OK**.
12. With the Local intranet zone selected ,click the **Custom level** button for Security level for this zone
13. Scroll to **ActiveX Controls** and **plug-ins** section.

14. Enable all options under **ActiveX Controls and plug-ins**. Be sure to enable "Initialize and script ActiveX controls not marked as safe" so that the ActiveX controls can function on the client machine .
15. Click **OK**. If shown, click **Yes** to the confirmation message that you want to change the settings.
16. click **OK**.

Accessing Fourth Shift from the Client

After completing the My Fourth Shift Workplace server installation, your system is ready for client access. There is no client installation required for My Fourth Shift Workplace. There is a web-based viewer component required to print certain types of reports. This viewer is automatically downloaded the first time you print one of these reports.

Note: If you have an SSL certificate installed on the IIS server, the locations listed in this step begin with **https** rather than *http*.

1. Right-click on the Internet Explorer program icon and select Run as Administrator. If you get a message asking if you want the following program to make changes to this computer, click **Yes**.
2. Enter the following location:

`http://ServerName.DomainName/fsportals` (where ServerName is the name of the My Fourth Shift Workplace server and DomainName is the name of your domain.)

For example, you might enter: `http://Server1.MyCompany.com/fsportals`

3. Log in, if requested.

We recommend that you add this page to your favorites or create an icon on the desktop.

Note: If a client needs to print bills of lading that include bar code fonts, the font must be installed on the client.

Installing the Bar Code Font on the Client

To install the bar code font on the client, do the following:

1. Click **Start Portal**.
2. Select **A Simple FS Portal**.
3. Login to WebUI.
4. Navigate to a screen, such as CNFG.
5. Select **Get VICS Bar Code Font** from the *Reports* menu in WebUI.
6. Click **Run** when requested.

Registry Edit for My Fourth Shift Workplace Help

My Fourth Shift Workplace users may require a system registry edit to view the help content.

Note: You must have administrator rights on the workstation to enter this registry edit.

The system administrator could implement this registry edit on all PCs on the Intranet using a Group Policy object.

Follow these steps to update the registry for viewing help content from My Fourth Shift Workplace:

1. Logon to the computer as the administrator.
2. From Internet Explorer, go to My Fourth Shift Workplace.
3. Click **Start Portal** and select "**A Simple FS Portal.**"
4. Login to Fourth Shift WebUI.
5. From the WebUI Help menu, select "**Permit Help Display.**"
6. A message appears indicating a file will be displayed. Click **OK**.
7. If you are prompted to open PermitHelp.txt, click **Open**.
8. If you are asked how to open this file, select Notepad.
9. From Notepad, read and follow the instructions:
 - a. Replace all occurrences of "YOUR-SERVER" with your Workplace server name.
 - b. Replace all occurrences of "YOUR-DOMAIN" with your domain name.
 - c. If your site is using HTTPS, replace all occurrences of http: with https:.
 - d. Click **File Save As...** and browse to a folder to save the file as **PermitHelp.reg**: You may want to save it in a common network location so other work stations can access it.
 - e. Open the REGEDIT registry editor program as administrator.
 - f. Click **File Import...** and browse for **PermitHelp.reg**, click **Open**, and click **OK**.
 - g. Close the Registry Editor.
10. You may need to logout of WebUI and close Internet Explorer and go back in to test Help.

Using the Find Feature

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

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

Accessing the Find Feature

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

Accessed from a Field Within Fourth Shift WebUI

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

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

- Using the keyboard, press Ctrl+Down arrow to access the Finder directly when the **Find** icon is displayed, or to drop down the menu when there is a menu of choices and the down arrow icon.
- Using the mouse, click on the trigger icon and select from the menu if there are multiple choices.

Accessed as a Portal Frame

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

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

- **Parent or Child**
The Find feature can be set up as the parent frame of another application (for example, WebUI).
- **Logon Information**
For security reasons, when accessing the Find feature through a portal frame, you are prompted to log on to Fourth Shift. If your user's authentication is "Fourth Shift" on the PASS screen, you can enter this log on information (user id and password) when creating the frame type so that you are not prompted for it when the Find portal is accessed. See [Assigning Security](#) for more information on assigning security in the **Find** feature.
- **Navigation**
When the Find feature is defined as a parent frame, an option is available to set the level of navigation.

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

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

Understanding the Find Feature

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

Filter Fields

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

- **Drop-Down Lists**
Filtering fields can be easily changed by using a drop-down list and simply selecting another field. For example, to filter the customer list by currency code, use the drop-down from any field selector and select the Currency Code field. You can then enter data in the criteria field to filter the list by a certain currency code. Field selectors without drop-down lists cannot be changed.
- **Field Labels**
Field labels used in the **Find** feature do not correspond exactly to the field labels used in Fourth Shift WebUI. The **Find** Feature lists similar fields in the drop-down lists together by function to simplify locating similar information. For example, all the fields relating to Terms start with the word "Terms"; and the field label "phone", which may appear several times, is identified as "contact phone" and "customer phone" in the **Find** Feature.

- **Toolbar**

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

- See which Finder is running and select a different Finder when run as a portal frame.
- Use the **Reload** data icon to apply the query and reload the data grid.
- Use the **Save** settings icon to save your settings on the client as described in the Save Settings section.
- Use the **Clear Criteria** icon to remove the filter criteria from all fields.
- Use the ? (question mark) icon to display the Help window to assist you with using the Finders.

Criteria Fields

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

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

Search Results List

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

- **Setting the records per page**
You can specify the number of records of returned data to display per page, based on your screen area settings. Enter a value in the **Records Per Page** field to change the display. The default number is 100.
- **Navigating through the list**
You can use the set of controls to navigate through the list of data. You can go to the first page, previous page, next page or last page. You can also navigate using the vertical scroll bar located on the right side of the list or using keys on your keyboard, such as Page Up, Page Down, arrow up and arrow down.
- **Sorting the Results List**
You can change the sort order by simply clicking on the header of another column. You can reverse the sort order from ascending to descending by clicking on a column header that is already sorted. The current sort field is identified by an angle bracket in the field header.
- **Changing Column Widths**
Change the width of the columns in the data grid by moving the dividers in the grid header.

Data Selection

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

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

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

Save Settings

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

Reset Finder Fields to Defaults

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

- **Customer Finder defaults**
 - CSR
 - Cust Zip
 - Customer Contact
 - Customer Phone
- **Customer Order Finder defaults**
 - Order Status
 - Customer Id
 - Customer Name
 - CO Rev Date
- **GL Master Account Finder defaults**
 - Organization Description
 - Account Type
 - Account Category
 - Account Open or Closed
- **Item Finder defaults**
 - UM
 - Make/Buy Code
 - Type
 - Order Policy
- **Lot Finder defaults**
 - Lot User Def 1
 - Lot User Def 2
 - Lot User Def 3
 - Lot User Def 4

- **Manufacturing Order Finder defaults**
 - Order Status
 - Gateway WC
 - MO Rev Date
- **Purchase Order Finder defaults**
 - Order Status
 - Vendor Id
 - Vendor Name
 - Rev Date
- **Vendor Finder defaults**
 - Vendor Contact
 - Vendor Phone
 - Vend City
 - Vend State

Assigning Security

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

- **Fourth Shift Screen Level Security**
Screen level security can be assigned to the Fourth Shift screens using your User ID and the existing passwords, access codes and function codes specified on the PASS (**Password Maintenance**) and FCMT (**Function code Maintenance**) screens.
 - Note:** If you are using the Sales Order Processing Module (SOPM), the you must set up the following screens for the WebUI Find Feature to allow access to SOPM order entry data.
 - Name/Address Detail (SOP2)
 - Financial Detail (SOP3)
 - Order Information (SOP4)
- **Finder Field Level Security**
Field level security is built by the **Find** feature based on the screen level security of the PASS and FCMT screens. Since the fields available for filtering may originate on several different screens, the **Find** feature verifies that you have security to at least one of those screens before allowing you to view or filter on those fields.

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

Security by Field

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

Customer

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

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

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

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

Vendor

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

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

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

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

Item

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

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

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

Customer Order

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

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

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

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

Manufacturing Order

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

Purchase Order

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

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

GL Master Account

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

Lot

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

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

Specifying Criteria

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

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

Using the Charting Feature

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

Setting Up the Portal

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

Using the Charting Samples

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

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

Creating User-Defined Charts

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

Using SSII and SSIL (Stock Status by Item or Location)

These screens offer the user an enhanced ability to display and filter inventory information by items and locations. At the bottom of the grid, a footer will show how many rows are being included in the results.

Grid columns are sizeable, movable and can be sorted in ascending or descending sequence. An option using the Setting icon allows the grid to return to the default layout but the sort sequence will be maintained until the user either refreshes the screen or changes to a different sort sequence.

The columns also have a dropdown menu of the types of filters that can be applied to that type of data and the value to be used. More than one filter can be applied to the grid rows.

For example, the Inventory Value column can be filtered using qualifiers such as Equals, Greater than, Less than.

The screens utilize keyboard activity of Arrows (Up/Down, Right/Left) and Tabs (Forward, Backward), remembered fields, and links to other Fourth Shift functions.

The Settings icon also provides the ability to export the grid detail to an Excel spreadsheet.

Using Fourth Shift Portals

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

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

What is Included in a Portal?

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

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

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

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

Frames

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

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

Portal Types

Portal definitions are created in one of the following categories:

- **Public portals** can be accessed by all users. This is useful for a general purpose portal, beginning a portal for other users or templates for users to begin with when constructing their own portal.
- **Private portals** can be accessed only by the user that creates them. This allows users to create a number of specific portals that allow them to complete their jobs more productively. For example, users may create different portals for monthly tasks or for solving specific types of problems.

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

Portal Manager

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

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

Portal Bar

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

- **Current Portal and Portal List access.** On the left side of the Portal Manager frame is the portal list access button. The title on the button is the name of the portal you are currently viewing. When you click the title, the list is displayed. Clicking the title when the list is already displayed, hides the list.
- **Portal Security link.** Allows you to grant portal admin access to current portal users, revoke portal admin access and view portal user account information. Only a portal administrator will see this icon.
- **Preferences link.** Allows you to set up and create portal definitions and personal preferences.
- **Save Layout link.** Updates the frame sizes and locations of the current portal to match the current display. This portal will then display with this layout when accessed.
- **Log Off link.** Exits all Fourth Shift frames. This method of exiting Fourth Shift allows screen level validations to be completed when you exit the system. Closing the Internet Explorer browser **does not** communicate with the Fourth Shift frames so no validation is completed. **It is highly recommended that you always** use the **Log Off link** in the portal bar to exit My Fourth Shift Workplace.
- **Help button.** Opens the online help for the Portal Manager within My Fourth Shift Workplace. The active tab in the help describes portals. Use the other tabs to learn about using the Fourth Shift specific frames like WebUI.

Portal List

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

The following options are available as buttons in the list.

- The **Portal Admin portal group is visible only** when you are logged in as the main portal administrator. It allows you access to all portals created by the main portal administrator for this portal group, as well as the default admin portals: Explorer Security and Remote Server Admin.
- The **Connectivity Toolkit portal group is visible only** when you are logged in as the main portal administrator and you have this module installed. It allows you access to the portals that are part of the Connectivity Toolkit module used to customize the WebUI interface.
- **All Public Portals** shows the public portal definitions that are available to all users, in a single list.

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

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

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

Frame Definitions

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

This frame definition consists of the following information.

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

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

Frame Title

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

Frame Type

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

The frame types include the following:

Type	Description
FS Chart	Runs the Fourth Shift charting application.
FS Explorer	Displays the Fourth Shift Explorer application tree for navigation and assistance when using FS WebUI type frames.
FS Finder	Runs the Fourth Shift Find application.
FS UIEditor	Runs the Fourth Shift UI Editor application.
FS WebUI	Runs a Fourth Shift session on the web server.
Terminal Server	Runs a Windows (non-Web) application through Windows Terminal Server.
Arbitrary Site	Accesses a URL address for any web site that is not necessarily associated with Fourth Shift or one of the other frame types.

Type	Description
Named Site	Similar to an Arbitrary Site in that it can be used to access any web site. However, a Named Site allows the URL to be defined as a known location in the location list, and then simply referenced by name.
KPI Display	To display a Key Performance Indicator from the optional Business Intelligence module.

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

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

Predefined Locations

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

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

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

Parameters

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

FS WebUI Frame Initialization

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

- Initialization strings for Fourth Shift WebUI type frames must start with a question mark (?) character.
- The initialization string you enter is automatically sent when the frame displays. Be sure to input the same keystrokes as you would on a keyboard, including tabs between fields.
- The initialization string can include literal keyboard characters such as a function code, or special keys such as the TAB key. Special keys are entered in braces. For example, to transport to the BILL screen and display the item **19-FRAME**, enter the following as the initialization string: **?BILL{ESC}19-FRAME{CR}**. See below for a list of special keys.
- Special keys are not case-sensitive.
- If you are including data values in an initialization string, it is recommended that you use **{Ctab}** instead of **{Tab}** for tabbing between fields.

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

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

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

Other External Frame Initialization

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

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

Parent Frame

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

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

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

Fourth Shift User Information

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

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

Default Frame Settings

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

Default Finder

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

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

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

Default Chart

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

Screen Size

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

Default Application

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

Default KPI

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

Frame-to-Frame Communication

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

Terms

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

- **Parent frame** is the frame that is the source of data communication. This frame publishes the data to the Portal Manager, which is running behind the scenes as part of My Fourth Shift Workplace.
- **Child frames** listen for the data communication from their parent frame. The child frame reacts to the data by refreshing the content of the frame based on the new data. If no parent frame is listed, users need to interact with the frame directly to change the data displayed.
- **Fourth Shift frame** types automatically support frame-to-frame communication.
- **External frame** types can either be another organization's web content (like DHL or UPS) or your own corporate intranet or web site. External frames can use data from a parent frame but additional steps are needed to take advantage of the data. For example, you will need to identify initialization string elements to use in the URL address to refresh the external frame.
- **Links** are used by WebUI to identify navigation possibilities. For example, the **Item** field is a link to the Item Master on many WebUI screens. Links are normally displayed underlined if you have set your Internet Browser option to show links that way.

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

Communication Process

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

- **Linked Data.** The data published by Fourth Shift WebUI frames is determined by the data elements that are links to other screens. In other words, a message is published for each link on the parent screen.
- **Parent/Child Relationships for Fourth Shift Frame Types.** Fourth Shift frame types are able to take full advantage of the parent/child frame relationship. The linked data is communicated automatically between Fourth Shift type frames when the linked data is understood by the child frame.
- **Parent/Child Relationships for Non-Fourth Shift Frame Types.** External frame types are not aware of data that might be published by Fourth Shift frames. You can, however, develop your own web pages that are equipped to understand these messages. Use the sample applications provided with My Fourth Shift Workplace to use as a guide in developing your own pages. See the files in the Inetpub\WWWRoot\FSPortals\Sample directory.

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

- **Communication Limitations.** The communication feature builds upon technology embedded in Internet Explorer. This technology requires that the parent and child frames are both located within the same domain. Therefore if your Portal Manager is located on a site on server **MyServer.MyCompany.com**, the communicating frames can be on any server in the **MyCompany.com** domain. This means that Internet Explorer will not allow a frame from **MyServer.MyCompany.com** to communicate with a frame from **YourServer.YourCompany.com**.
- **Remembered Fields.** The Remembered Fields feature in Fourth Shift WebUI allows you to navigate from one screen to another and retain key data being viewed on the previous screen. The Remembered Fields feature is available within a frame only. It is not available for frame-to-frame communication.

Portal Images

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

If you create images:

- Create the images in JPG format.
- Use an image size with a width of 120 and a height of 60 pixels.
- Save the final images in the InetPub\wwwroot\FSPortals\Images directory.

Virtual Space

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

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

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

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

Running Microsoft Windows-based Applications in a Portal

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

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

Implementing Terminal Server Frames

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

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

Starting Applications in a Terminal Server Frame

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

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

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

User Licenses and Terminal Server Frames

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

- the application is specified as the default application for the frame during portal setup
- the application is selected from the application tree in the Terminal Server frame

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

ASP Sessions and Terminal Server Frames

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

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

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

- Leave the browser window open, switch between portals, and switch back to the original Terminal Server portal. Log in as the same user. Because the same user and the same command line will be sent (containing the same Session ID) the user will be re-connected to the session.
- Switch to a Terminal Server frame that does not start up an application, but instead exposes the desktop. This will connect the user to any running session under the Windows account used to log in. If multiple sessions for that user are running, they will be presented with a list of sessions to select one.

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

Portal Administration

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

The following are some administration considerations:

- **Portal definitions** are stored in a Microsoft SQL Server (or SQL Express) database that is created when the server installation is done. This workplace database is called FSWorkplace by default. This technique allows users to run My Fourth Shift Workplace from any machine and use the portals defined for them.
- The **workplace database** should be included in your daily backup if you are concerned about restoring this information in the event of a system failure. See "Performing Daily Backups" in the My Fourth Shift Workplace manual for more information.
- The **portal administrator** is a user with the ability to perform the advanced administrative tasks for My Fourth Shift Workplace. By default, it is the user who installs the My Fourth Shift Workplace software who becomes the main portal administrator. Only a portal administrator can perform the following administrative tasks:
 - View and use the private admin portal groups (Portal Admin and Connectivity Toolkit)
 - Delete any public or private portal
 - Edit public portals

Printing and Generating Reports in WebUI

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

Reporting Features

- Most Fourth Shift screens can generate one or more reports. Select **Preview** or **Print** from the **Reports** menu to generate a report.
- Many batch process tasks also generate reports. Use the BEXE (Batch Execution) screen to specify the **Report Destination** for batch process reports.
 - If **Report Destination** = 1, the report is displayed in a separate window. It is not printed directly.
 - If **Report Destination** = 2, the report is printed to disk on the Fourth Shift server. The report is not displayed on your computer. In order to view the report, you must access it using a LAN or dial-up connection.

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

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

Template-based Reports

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

RTF-based Reports

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

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

Microsoft Office is Installed

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

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

Microsoft Office is Not Installed

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

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

Using Navigation Features

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

Using the Mouse

You can use your mouse to complete the following actions:

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

Using Menu Options

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

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

Using Tools

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

Selecting from a Browse or Detail List

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

Setting up Defaults

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

Using Extended Text

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

Performing Mass Maintenance

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

Using Cash Reversal Selection

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

Adding Data

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

Deleting Data

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

Field Action

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

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

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

Toggle Currency Information

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

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

Using Portal Bar Links

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

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

Differences in My Fourth Shift Workplace

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

Fourth Shift WebUI Compared to Fourth Shift GUI

- Reports generated from My Fourth Shift Workplace are displayed on screen in a browser window if **Report Destination** = 1 (printer) on the BEXE (Batch Execution) screen. This allows you to select a desired printer.
- Files generated by the following tasks in My Fourth Workplace are created on the server instead of on your workstation: ACCX (Access Extract), ASCX (ASCII Extract), DBSX (dBase Extract) and EXLX (Excel Extract). You also can transfer these files to your client if desired. If you want these files to be generated on your local machine, you need to use the traditional Fourth Shift program.
- On the BEXE (Batch Process Execution) screen, the ability to show or hide details is no longer needed since detail messages are always shown during processing. Also, the Stop button has been split into two buttons called **Stop Task** and **Stop Batch** so that a second dialog is not needed.
- The following parameter functionality is no longer available when using the IMPT (Data Import) and RCVR (System Recovery) tasks:
 - **S Parameter: Step Mode.** The Step Mode ability of the S parameter is not available in WebUI. The Step Mode ability allowed you to start the import process in single step mode so you could review each keystroke for troubleshooting purposes. The other S parameter abilities, such as allowing you to Pause, Continue or Stop, are still available.
 - **Vx Parameter: View Mode.** The View Mode (Vx) parameter is not available in WebUI. This parameter allowed you to control how the user interface was displayed during import processing. You could hide transaction processing (VH), minimize the entire Fourth Shift session (VM) or show transaction processing (VS).

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

- You can use the traditional fat client Fourth Shift program to run the IMPT and RCVR tasks using the S parameter for Step Mode and the Vx parameter for View Mode, if desired.
- The size of each screen is based on its original size in Fourth Shift. For example, several detail screens in Fourth Shift WebUI are smaller than the main screens because these detail screens were smaller than the main screens in Fourth Shift.
 - Several Fourth Shift modules do not take advantage of My Fourth Shift Workplace web-style features. See "Restricted Features" in the My Fourth Shift Workplace manual for more information on which modules need to run under a Windows Terminal Server frame.

Internet Explorer Options Compared to Fourth Shift WebUI

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

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

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

My Fourth Shift Workplace: How Do I?

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

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

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

Add Charting Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal. The **Edit Preferences/Portal** screen is displayed.
2. Click the **Add a New Portal** icon.
3. Enter the **Portal Name**.
4. Select the **Private/Public** portal type.
5. Do one of the following to select the **Portal Group**.
 - Select an existing group from the drop-down list
 - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.
 - a. Add a **New group name** for your user information.
 - b. Select the **Private** or **Public** portal type.
 - c. Click **OK**.
6. Select whether you want this to be in a large virtual space or not.
7. Select the **Layout tab**.
8. Define the number of frames in this portal.
9. Enter frame definition information for your portal:
 - frame title
 - frame type = **FS Chart**
 - location
 - parent frame = Frame A or B—select the one where the Fourth Shift WebUI frame is located, based on your portal layout
 - default charts
10. Click the **Image tab** and select an image for your portal.
11. Click the **Save** button to save your changes, or click the **Add** button again to discard your changes.

Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click the new portal.

Tips

- To select a chart that starts by default when the portal is accessed, expand the **Default Chart** list and select a graph or table.
- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.

Add Finder Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Click the **Add a new Portal** icon.
3. Enter the **Portal Name**.
 - This name *must* be unique from all other portals that you have created.
 - If it is a public portal, the name must be unique name from all other public portals.
4. Select the **Private/Public** portal type.
5. Do one of the following to select the **Portal Group**.
 - Select an existing group from the drop-down list.
 - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.
 - a. Add a **New group name** for your user information.
 - b. Select the **Private** or **Public** portal type.
 - c. Click **OK**.
6. Select whether you want this to be in a large virtual space or not.
7. Select the **Layout tab**.
8. Define the number of frames in this portal.
9. Enter frame definition information for your portal:
 - frame title
 - frame type = **FS Finder**
 - location
 - parent frame = Frame A or B—select the one where the Fourth Shift WebUI frame is located, based on your portal layout
 - Fourth Shift log on information
 - navigation = select if you want the Find feature (parent) to navigate Fourth Shift WebUI (child) based on the Find feature's data selections.
 - default finder
10. Click the **Image tab** and select an image for your portal.
11. Click the **Save** icon to save your changes, or click the **Add** icon again to discard your changes.
12. Click **Close** to exit the portal update process.

Note: To view your new portal, click **Start Portals** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click on your new portal.

Tips

- When accessing the **Find** feature through a portal frame, you are prompted to log on to Fourth Shift. If your user's authentication is "Fourth Shift" on the PASS screen, you can enter this log on information (user id and password) when creating the frame type so that you are not prompted for it when the Find portal is accessed.
- When the Find feature is defined as a parent frame, an option is available to set the level of navigation:
 - Option Selected. The Find feature (parent) sends a message to Fourth Shift WebUI (child) and Fourth Shift WebUI changes to the desired screen and the data is entered into the appropriate field.
 - Option Not Selected. The Find feature (parent) sends a message to Fourth Shift WebUI (child) and if the desired screen is already displayed, the data is entered into the appropriate field. If the desired screen is not displaying the desired screen, the data is not entered.
- To select a finder that starts by default when the portal is accessed, expand the Default Finders list and select a finder.
- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.

Add Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal. The **Edit Preferences/Portal** screen is displayed.
2. Click the **Add a New Portal** icon.
3. Enter the **Portal Name**.
 - This name *must* be unique from all other portals that you have created.
 - If it is a public portal, the name must be unique name from all other public portals.
4. Select the **Private/Public** portal type.
5. Do one of the following to select the **Portal Group**.
 - Select an existing group from the drop-down list
 - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.
 - a. Add a **New group name** for your user information.
 - b. Select the **Private** or **Public** portal type.
 - c. Click **OK**.
6. Select whether you want this to be in a large virtual space or not.
7. Select a **Layout tab**.
8. Define the number of frames in this portal.

9. Enter frame definition information.

For example, enter the frame title, frame type, location, parent frame and default settings to customize your portal.

10. Click the **Image tab** and select an image for your portal.
11. Click the **Save** icon to save your changes or click the **Add** icon again to discard your changes.
12. Click **Close** to exit the portal update process.

Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click your new portal.

Tips

- Public portal definitions are available for any user to access but they can only be changed or deleted by the portal administrator.
- Private portal definitions are saved by your Windows login identifier.
- If you wish to create a new portal group, click **New Group** and enter the new group information.
- Portal images must exist in the Inetpub\WWWRoot\FSPortals\Images directory. You can add .JPG files to this directory, if desired.
- Portal layout can only be defined when you create a new portal definition.
- Initialization string values differ by frame type. See "Initialization String" in the Portal Manager section of the *My Fourth Shift Workplace* manual for more information.
- Several optional settings are available for FS Finder and FS Chart frame types, such as specifying the default Chart or Find type, and whether the Find results navigate the Fourth Shift application.

Add Portal Group

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal. The **Edit Preferences/Portal** screen is displayed.
2. Click the **Add a New Portal** icon.
3. Click **New Group** to display the **Add New Group** dialog window.
4. Add a **New group name** for your user information.
5. Select the **Private** or **Public** portal type.
6. Click **OK**.

The portal group is now available for use in a portal definition.

Tips

- Portal groups can be deleted and given to other users in a group tree.
- Private groups are saved by your Windows login identifier.

Add Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Click **Locations**.
The **Edit Known Locations** dialog is displayed.
3. Enter a new **Location Name**.
4. Enter a **Location URL**.
5. Enter the **Configuration File**.
6. Select one or more of the **Supported Frame Types**.

Note: The Arbitrary site and Named Site Frame Types are always supported.

- FS Chart
- FS Explorer
- FS Finder
- FS UIEditor
- FS WebUI
- Terminal Server

7. Click **Add New**.

The **Defined Locations** list is updated and your new location is listed.

Note: Because the **Location Names** are visible to users, we recommend using names that clearly identify what the URL address accesses. For example, use a location name like *Colorado Plant* rather than a server name like *CCSVR-21*.

Change Default Portal

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Select one of the predefined portals from the **Default Portal** drop-down list.
3. Click the **Save** icon.

The **Edit Preferences/Portal** screen displays the **Changes saved** message.

Tips

- Only public portals and your private portals can be selected.
- Create a new portal if none of the predefined portals meet your needs.
- To change back to the original default portal, select the *Start Portal* option from **All Public Portals** panel or click the **Start Portal** button in the upper-left corner.
- You can customize the links in the original default portal.
For example, you can customize the "Your Company Home Page" link by updating the default link with your own company home page address.

Change Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Select the portal you want to work with from the **Portal Maintenance** drop-down list.
3. Click the **Edit this Portal** icon.
4. Use the **General Layout** and **Image tabs** to display and change the definition.
For each frame in your portal, review and update the frame detail as needed.
5. Click the **Save** button to save your changes, or click the **Edit** button again to discard your changes.
6. Click **Close** to exit the portal update process.

Tips

- The Portal layout option cannot be changed. You must create a new portal to change the number or configuration of frames.
- If you wish to change the order of the frames, change the frame definitions to display the desired content.

Change Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Click **Locations**.
3. Highlight the **Defined Location** you wish to change.
4. Review and change the **Location Name** if necessary.
5. Review and change the **Location URL** if necessary.
6. Review and change the **Configuration File** if necessary.
7. Update the **Supported Frame Types**.
8. Click **Update**.

Tips

- Changes to predefined locations are available to users immediately.

Delete Portal Definition

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Select the portal you want to work with from the **Portal Maintenance** drop-down list.
Important: Deleting a portal is *permanent*—there is no *Undo*.
3. Click the **Delete this Portal** button.
The **Delete Confirmation** dialog message is displayed.
4. Verify that this is the correct portal then click **Yes**.

Tips

- Portal definitions must be recreated if you accidentally delete a portal.
- Public portals can only be deleted by the Portal Administrator.

Delete Predefined Locations

1. Click the **Preferences** link in the upper-right corner of My Fourth Shift Workplace portal.
The **Edit Preferences/Portal** screen is displayed.
2. Click **Locations**.
3. Select the location you want to delete from the list displayed for **Defined Locations**.
Important: Deleting a location is *permanent*—there is no *Undo*.
4. Click **Delete**.
The location is deleted and the **Defined Location** list is automatically updated.

Tips

- If the predefined location is referenced in a portal definition, the predefined location cannot be deleted.

Access Help

Several methods are available for accessing help for My Fourth Shift Workplace and portals.


Context-Sensitive Help in Fourth Shift WebUI

1. Use the options in the **Help** menu on the current tab to review context-sensitive help for the function.
2. Click the **X** in the upper-right corner of the help window to close the window.

My Fourth Shift Workplace and Portals

1. Click the **Help** link in the My Fourth Shift Workplace portal bar.
2. Use the tabs to review the detail on using My Fourth Shift Workplace and portals.


Close My Fourth Shift Workplace

Important: We strongly recommended that you *do not* use the Internet Explorer **Close** button () to exit My Fourth Shift Workplace. Closing the Internet Explorer *does not* exit the Fourth Shift WebUI application—it will continue to run until the session times out.

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

The **Goodbye** page is displayed and you are notified that the *Fourth Shift Portals session* has ended.

2. Do one of the following:

- Click the Internet Explorer **Close** button () to close the browser window.
 - Click the **here** link on the *Goodbye* page to start a new My Fourth Shift Workplace session.

Tips

- You are not allowed to close My Fourth Shift Portal session if you have not completed the current transaction in a Fourth Shift WebUI frame. For example, from the APIE (**A/P Invoice Entry**) screen, a warning message is displayed if you click the **My Fourth Shift Portal** button *before* you've completed the G/L distribution.
- We recommend that you use the **Log Off** portal bar link to exit My Fourth Shift Workplace.

Select Portal from List

1. Click **Start Portal** or the portal name in the My Fourth Shift Workplace portal bar to open the portal manager (in the upper left-hand corner).

2. Select one of the following to open a list of available portals.

- **Group Tree**—to view a hierarchical tree of private and public groups.
- **All Public Portals**—to view a list of available public portals.
- **Private Group Name**—to view a list of your private portals in that group.

3. Click the portal icon located above the portal name you want to work with.

Your selected portal is displayed automatically.

Note: Click the portal or group name to toggle between *show* or *hide* when displaying the list of portals or groups.

Tips

- Private portal definitions are only available to the user who created them.
- To change back to the original default portal, select the **Start Portal** option.

Run a Microsoft Windows-based Application

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

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

2. Click the **Add a New Portal** icon.
3. Enter the **Portal Name**.
4. Select the **Private/Public** portal type.
5. Do one of the following to select the **Portal Group**.

- Select an existing group from the drop-down list
 - Click **New Group** to display the **Add New Group -- Web Page Dialog** window.
 - a. Add a **New group name** for your user information.
 - b. Select the **Private** or **Public** portal type.
 - c. Click **OK**.
6. Select whether you want this to be in a large virtual space or not.
 7. Select the **Layout tab**.
 8. Define the number of frames in this portal.
 9. Enter frame definition information—select **Type = Terminal Server** for at least one of the frames.

This is the frame through which you can run an external application.

10. Select the **Default Application** you would like to run through the Terminal Server frame.

For example, if you would like to run the Fourth Shift Shop Calendar in this frame, expand the "Fourth Shift WTS Applications" tree and select "Fourth Shift Shop Calendar." This is the application that will start by default when the portal is started.

11. Click the **Image tab** and select an image for your portal.
12. Click the **Save** button to save your changes, or click the **Add** button again to discard your changes.
13. Click **Close** to exit the portal update process.

Note: To view your new portal, click **Start Portal** in the My Fourth Shift portal bar. From the list of portal groups, select the group where your new portal is defined. From the list of portals, click on your new portal.

Tips

- Private portal definitions are only available to the user who created them.
- If you want to run any Windows desktop application from a Terminal Server frame, select "Windows Desktop" as the startup application when configuring the Terminal Server frame.

Save Find Feature Settings

1. Open the **Finder** feature either as a frame or a popup window from WebUI.
2. Select the fields to display in each column.
3. Specify filter criteria, if desired.
4. Click the **Reload data** icon.

The results are displayed in the Finder pane.

5. Click the **Save settings** icon.

Tips

- Settings are saved differently separately for each type of Finder.
- Settings are saved by workstation, not by User ID. You must have the necessary Internet security that allows cookies to be stored on your workstation in order to save settings.

Specify Finder Feature Criteria

1. Do one of the following to open the **Finder** feature:
 - **From a field within Fourth Shift WebUI:**
 - a. Point to the *Find* icon.
 - b. If this field has a menu of options, use the down arrow to display it.
 - c. From the list displayed, select **Find** <data>.
 - **From a portal frame:**
 - a. Select the portal from your portal group that has been assigned the **FS Finder** frame type.
 - b. If prompted, log on to Fourth Shift using the appropriate authentication mode defined in PASS.
2. Select the fields to filter by and specify filter criteria, if desired.
3. Click the **Reload data** icon.
4. Click the arrow row marker to select the data.

The data is entered into the active field.

- The **Finder** feature *closes*, if it was accessed from within Fourth Shift WebUI.
- The **Finder** feature remains *open*, if it is a separate portal frame.

Tips

- As an alternative, you can press **Ctrl+Down Arrow** to open the list and then press the up/down arrow keys to move within the list. **Tab** or **Enter** will select the highlighted item.
- Click the **Clear Criteria** icon to remove the filter criteria from all fields.
- Click the **Save settings** icon to retain your sort order and filter criteria for the current session.
- If starting data was entered in the originating field before accessing the Find feature, this data is automatically entered into the filter criteria. If starting data was not entered, the Find feature opens and you can enter filter criteria in the row of available fields.
- When entering criteria, you can enter a space before the specified value in order to display a list of all the identifiers that contain the criteria anywhere in the identifier. Without the space, the list includes only the identifiers with the criteria as starting characters.
- To change the sort order, click on the header of another column. To reverse the sort order from ascending to descending, click on a column header that is already sorted. The sort order is saved when **Save Settings** is selected.
- The Finder feature uses field-level security, which allows only the users who are assigned the appropriate security to see certain fields. See the **Assigning Security** topic, in the *Fourth Shift Basics* online Help, for more information on security for the Find feature.

Using Fourth Shift Report Viewer

Fourth Shift Report Viewer is a program used to display reports before they are printed, or to open previously saved reports. It allows you to view any page of the report, and print the report on any printer set up on your computer. You can also save the report as a file on your computer, or open a previously saved report.

You can access Fourth Shift Report Viewer from any screen that generates a screen report by choosing **Print Preview** from the **File** menu. The **Print Preview** option is available only for screen reports. You can also access it by selecting **Report Viewer** from the Fourth Shift **Tools** menu.

Fourth Shift Report Viewer can open, print and save both template-based and RTF-based reports.

Printing Reports in Fourth Shift Report Viewer

Do one of the following to print a report from Fourth Shift Report Viewer:

- Choose **Print** from the **File** menu to specify a printer or fax machine, or to specify a range of pages to be printed
- Click **Print** on the toolbar to print the entire report on your computer's default printer

To change the paper size, specify portrait or landscape orientation, or modify any other printer settings, choose **Print Setup** from the **File** menu before printing the report.

Previewing Reports in Fourth Shift Report Viewer

Fourth Shift Report Viewer allows you to preview a report on your screen before it is printed. You can check the layout and content of a report before printing, or simply review and close a report without printing.

Normal and Preview Views of RTF Files

Fourth Shift Report Viewer provides two viewing options for previewing a report: *Normal* and *Preview*. Each time Fourth Shift Report Viewer opens, it is in *Normal* view. To switch to the *Preview* mode, select **Print Preview** from the **File** menu. Click **Close** to return to the Normal view.

The viewing option you choose does not affect the layout of the actual report. In Preview mode, you can do the following:

- see the printer margin area
- print the report
- display one page at a time, or two pages side by side
- zoom in for a detailed view or zoom out to see the overall layout of the report

Moving Between Pages

Many reports contain more than one page. In Normal view mode, page breaks are shown on your screen by a dotted horizontal line. In Normal view, do one of the following to move between pages in a report:

- Use the vertical scroll bar to scroll between pages
- Use the toolbar buttons or the options in the View menu to move to the first, next, previous or last page
- Enter a specific page number in the toolbar then press **Enter**

Print Preview and Action Messages

A number of Fourth Shift action messages instruct you to print a specific document. Typically, when you print the document, the action message is deleted.

For these documents, selecting **Print Preview** is treated the same as printing the document.

- If you choose to **Print Preview** one of these documents, Fourth Shift assumes that the document has been printed, and the action message is deleted.
- *Do not* use **Print Preview** for these documents unless you plan to print the report at that time.

These action messages include:

Action Messages	Description	Document Printed From
ACK	Print order acknowledgment	COMT
PMO	Print manufacturing order	CPMT, MOMT
PPL	Print picklist	PICK
PPO	Print purchase order	POMT

Saving Screen Reports Using Fourth Shift Report Viewer

After you have previewed a newly-generated, or previously-saved, screen report, you can use the Fourth Shift Report Viewer to save it to a file.

Other Ways to Save a Screen Report

If you want to save a screen report (if available) without previewing it first, use the **Print Export** from the **File** menu. You can choose from several file formats when saving the report using the Print Export option.

Viewing Batch Process Reports Using Fourth Shift Report Viewer

Reports generated by batch process tasks are printed to disk as a file if you selected **Report Destination = 2** for the task.

You can view these reports only after they are created. You cannot preview a batch process report as part of the batch process itself. You can, however, add a line to a batch process that opens the report using Fourth Shift Report Viewer, prints the report automatically, or converts the report file to plain text format. For more information, see [Fourth Shift Report Viewer Command Line Parameters](#).

Open the Fourth Shift Report Viewer by choosing **Report Viewer** from the **Tools** menu. Locate the report you want to view and click **Open**. Be sure to select **All files** in the **Files of type** box, because batch process report files use the Process Id of the batch process as the file extension.

Note: If you regularly need to view report files, you may want to customize the toolbar by adding a button that opens the Fourth Shift Report Viewer. For more information, see the **Customizing the Toolbar** topic in the *Fourth Shift Basics* online Help.

Converting Saved Reports to Plain Text Format

There may be times when you need to convert a screen or batch process report file to plain text (TXT) comma-delimited format. Although you cannot change the file format when you save the report, you can run the Fourth Shift Report Viewer (FSPRINT.EXE) silently, using a command line parameter that performs this conversion.

The syntax for this command line parameter is as follows:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE <report file name> /text <text file name>
```

For example, to convert the saved batch process report file M:\MFGSYS\PORR01.PUR to a plain text file in the same directory with a .TXT file name extension, use a command line similar to the following:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE M:\MFGSYS\PORR01.PUR /text
M:\MFGSYS\PORR01.TXT
```

You can perform this conversion using any command line execution method, such as a batch file, batch process, shortcut, or the **Run** dialog box. For more information on operating Fourth Shift Report Viewer from a command line, see “Fourth Shift Report Viewer Command Line Parameters.”

Adjusting Report Fonts and Margins

You can change the look of your printed RTF-based reports by modifying the fonts and margins. To do this, you must add or modify lines in your FS.CFG (or [system name]LOCALFS.CFG) file.

The default font for reports is 10 point Courier New. You can modify this by changing value of the **RtfReportFontName** configuration variable. You can improve the speed of report printing on dot matrix printers by using a printer font instead of a TrueType font.

The default margin on the left side of the page is 13/36 inch, with no top, bottom or right margin. To modify these characteristics, add or change the following configuration variables:

Configuration Variable	Description
RtfBarCodeFontName	Name of bar code font
RtfBarCodeFontSize	Size, in ½ points, of bar code font
RtfReportFontName	Name of standard report font
RtfReportFontSize	Size, in ½ points, of standard report font
RtfReportFontSizeCompress	Size, in ½ points, of report font in compressed width areas
RtfReportLineSpacing	Distance between baselines of consecutive lines
RtfTwipsMarginTop	Size of top margin
RtfTwipsMarginBottom	Size of bottom margin
RtfTwipsMarginRight	Size of right margin
RtfTwipsMarginLeft	Size of left margin
RtfTwipsGutter	Size of gutter

Configuration Variable	Description
RtfTwipsHeaderY	Position of report header
RtfTwipsFooterY	Position of report footer

Note: These configuration variables have no effect on template-based reports. You can adjust the report fonts and margins on those reports by customizing the report template.

For more information, see "Configuration Variables" in the *System Administration* manual.

Fourth Shift Report Viewer Menus

Fourth Shift Report Viewer has three menus containing options for displaying, saving and printing reports.

Fourth Shift Report Viewer Command Line Parameters

You can create a shortcut to the Fourth Shift Report Viewer, or include it in a batch process or batch file, by using the following command line syntax:

```
FSPRINT <filename> [/title <title>] [/dir <dir>] [/save [<outfile>] | /print [/ask] | /text [<outfile>] | /showopen]
```

Parameter	Description
<filename>	Specifies the name and fully qualified path of the file to be opened, printed or converted.
/title <title>	Used to set the window title of the document when opened in Fourth Shift Report Viewer.
/dir <dir>	Used to set the default directory of the document when opened in Fourth Shift Report Viewer.
/save <outfile>	Used to save <filename> directly to the specified name and fully qualified path; if no <outfile> is specified, the Save As dialog box is displayed. This parameter can not be used with the /print, /text or /showopen parameters.
/print [/ask]	Used to print <filename> directly to the default printer set up for the workstation. If /ask is specified, the Print dialog box is displayed, allowing a choice of printers and other options. This parameter can not be used with the /save, /text, or /showopen parameters.
/text <outfile>	Used to convert <filename> to a plain text, comma-delimited file with the specified name. If no <outfile> is specified, the Save As dialog box is displayed. This parameter can not be used with the /save, /print, or /showopen parameters.
/showopen	Used to display the Open dialog box. This parameter can not be used with the /save, /print, or /text parameters.

In the following example, Fourth Shift Report Viewer is used to print a saved batch process report to the default printer after it is generated:

```
M:\MFGSYS\SYSTEM\FSPRINT.EXE M:\MFGSYS\PORR01.PUR /PRINT
```

Report Templates

Many Fourth Shift reports are generated using templates that define not only the data that appears on the reports, but the layout and formatting of the reports as well.

There are no differences in the actions you take to generate template-based screen reports or template-based batch process reports. However, template-based reports provide you with additional options for generating customized output, or multiple outputs of a single report.

Screen reports and batch process reports that are not generated using a template are generated instead as RTF (Rich Text Format) based documents.

Note: The templates used to generate these reports can be customized to change the layout of the report, or even the data contained in the report. For detailed instructions, see "Customizing Report Templates" in the *System Administration* manual.

Choosing Report Formats

When you use template-based reports, you can export reports to files in different formats such as PDF and CDF (Comma Delimited File). These files can then be viewed at a later time or used as input for processing by custom applications or distributed via email.

Printing External Documents

Fourth Shift generates a number of documents that are either distributed to your trading partners, or used to conduct business transactions with your trading partners. Many are designed to be printed on preprinted forms, although you can customize the templates used to generate the documents and print instead on plain paper. Or you can choose to email the reports automatically.

External documents are produced in a variety of ways. For example:

- Customer order acknowledgments, purchase orders and shipping documents are generated as screen reports.
- Invoices, order acknowledgements, and customer statements are generated as batch process reports.
- Checks and 1099 forms are generated as the result of screen processing.

For lists and samples of the external documents produced by Fourth Shift, see "Documents that Use Preprinted Forms" in the *Getting Started* manual.

Printing on Preprinted Forms

You may choose to print external documents, such as bills of lading, invoices and checks, on preprinted forms. If you are using preprinted forms, most of these documents offer alignment tests as part of the printing process. Use the alignment test before beginning a print run to ensure that the preprinted paper forms are correctly loaded in the printer.

Note: You are not required to use preprinted forms. Optionally, you can customize the report template used for printing external documents, and print them on plain paper using a laser printer. For more information on customizing report templates, see "Customizing Report Templates" in the *System Administration* manual.

Administering My Fourth Shift Workplace

Typical Fourth Shift system administration is changed in some ways once you implement My Fourth Shift Workplace in your operation. Additional considerations are needed for tasks such as automated processing and configuration options. You may also need to complete additional changes when updates are needed in your environment.

Administration of the client computer is much easier. No updates or setup is needed when applying an upgrade to the server.

Batch Processing Considerations

Batch processes are defined using the Batch Process Setup (BSET) screen and run using the Batch Process Execution (BEXE) screen. You can set up and run batch processes using My Fourth Shift Workplace as well as a traditional client.

The architecture of My Fourth Shift Workplace completes batch processing activities on the Fourth Shift server. This means that output from these processes are saved to the Fourth Shift server. The following considerations apply when running batch processes:

- **Batch Process Reports.** When a batch process runs, reports are generated either to a file on the Fourth Shift server (**Report Destination** = 2) or previewed in the browser (**Report Destination** = 1). Once displayed, the user can choose to print the report or save it to a file. If the user wishes to use a report file that has already been generated (**Report Destination** = 2), the file must be transferred to the user's computer through a LAN or dial-up connection after the processing is complete.
- **Output Files.** Several screens and tasks generate output files such as audit trail files, data files used to create custom documents such as statements, or off-loaded history data. These files are created only on the Fourth Shift server. If the My Fourth Shift Workplace user needs to review or access this output file, the file must be transferred to the user's computer through a LAN or dial-up connection after the processing is complete.

Examples of these type of screens and tasks include:

- GLAU (G/L Account Update) task which creates a series of electronic reports detailing actions completed by the processing
- ARBS (A/R Statement Export) task which creates a set of customer statement document data files
- AUDP (Item History Purge) screen which off-loads item history into a file.

For other batch processing differences when using My Fourth Shift Workplace, see "Differences in My Fourth Shift Workplace" in the Fourth Shift Basics manual.

Performing Daily Backups

It is recommended that you stop the My Fourth Shift Workplace web site and terminate any client sessions before starting the backup process. See "Managing User Connections" in this manual for more information.

Fourth Shift (workplace) database backups require a single point of control for the database. This means that all client sessions must be terminated and the Fourth Shift database must be brought up in single-user mode.

Add the **workplace support database** to your daily backup. This database is located in the SQL Server (or SQL Express) and is called FSWorkplace by default.

Managing Portal Access Security

You can allow portal users access to some portal administrator features by using the Portal Security feature (the link on the Portal Bar).

Adding Portal Admin Access

1. Log in to My Fourth Shift Workplace as portal administrator.
2. Select the **Portal Security** link from the Portal Bar.
3. Select the **Administrator Privilege** checkbox to check it.
4. Click **Save**.

Revoking Portal Admin Access

1. Log in to My Fourth Shift Workplace as portal administrator.
2. Select the **Portal Security** button from the Portal Bar.
3. Clear the **Administrator Privilege** checkbox.
4. Click **Save**.

Changing Portal Group Owner

Any user can change the owner of their own portals to make them public. However, only the main portal administrator, or any users with portal admin access, can change the owner of a public portal as well as any private portal. When you change the owner of a portal group, the owner of all portals in that group are changed also.

1. Log in to My Fourth Shift Workplace as the portal administrator or as a user with portal admin access.
2. Select the **Group Tree** portal from the Portal List.
3. Right-click on the portal group where you want to change the owner.
4. Select **Change Owner**.
5. Select the portal user to be the new owner and click **Submit**.

Managing User Connections

My Fourth Shift Workplace uses standard IIS web server technologies for running the site. This means that the Internet Services Manager is used to control the site operation.

In order to complete intensive or exclusive processing on the Fourth Shift database server, like a nightly batch processing run, you may wish to close any open client connections and stop the My Fourth Shift Workplace site so no new users can connect. You can use the Fourth Shift Active User List portal in the Portal Admin group to see who is logged into the system (fat and thin client connections will be listed). Instructions for stopping the web server are as follows.

Stopping the Web Server

Web server processes can be stopped several ways. The following method is recommended because it closes any active user sessions immediately.

1. Click the **Start** button and choose **Run**.
2. Type: `NET STOP IISADMIN`
3. Click **OK**.

Restarting the Web Server

Web server processes can be restarted several ways. The following method is recommended because it can be included in automated scripts if necessary.

1. Click the **Start** button and choose **Run**.
2. Type: `IISRESET /NOFORCE`
3. Click **OK**.

User sessions are not restarted automatically.

My Fourth Shift Workplace User Information

Fourth Shift Licenses

My Fourth Shift Workplace tracks access to the Fourth Shift system by Internet Explorer sessions. The frames within a single Internet Explorer session all share one Fourth Shift license to a particular database. Therefore, just as with multiple Windows applications, a user consumes only one Fourth Shift license from each Fourth Shift database accessed.

Note: Additional Fourth Shift licenses will be consumed for each additional Internet Explorer session (browser window) used. Also, if a portal accesses multiple Fourth Shift databases, it will consume a single Fourth Shift license from each system (just as the Windows application would).

Adding Portal Users

A user is added to the list of portal users automatically after they log onto My Fourth Shift Workplace for the first time. Their Windows login will determine if they are permitted to access to the Workplace server.

Maximum WebUI Instances

The My Fourth Shift Workplace server can host many instances of Fourth Shift concurrently. How many instances will depend on the hardware used and on users' specific activity. A modern server could handle up to 200 instances of Fourth Shift concurrently.

Each WebUI frame in an open Internet Explorer session represents an instance of Fourth Shift on the My Fourth Shift Workplace server.

For example, suppose 3 users are logged into the My Fourth Shift Workplace. Users A and B each have one Internet Explorer session open on their desktop, while User C has two Internet Explorer sessions open. Licenses and instances are consumed like this:

User	Number of WebUI Frames in portal	Licenses	Instances
A	1	1	1
B	2	1	2
C (session 1)	3	1	3
C (session 2)	1	1	1
TOTAL		4	7

If your site needs more WebUI instances than your server can handle, you can simply install an additional My Fourth Shift Workplace server for your Fourth Shift database. The second install of Workplace can also point to the original FS Workplace database so this information is shared between servers.

UserDir Location

The **UserDir** configuration variable is used to define a unique location for files created when a user is signed onto Fourth Shift. Each client must have a user-specific subdirectory on the My Fourth Shift Workplace server. This subdirectory has the same name as the IIS session id.

When a My Fourth Shift Workplace user accesses the system, the IIS session id is appended to the **FSWebUI\UserDir** location. The subdirectory is created automatically for use by session processing. When the session closes, the subdirectory is automatically deleted.

Note: If you configure the My Fourth Shift Workplace server to run Windows Terminal Server, the **UserDir** location must be modified. This configuration process is completed by a Fourth Shift consultant. Contact Fourth Shift Customer Support for more information.

Technical Details About ASP Sessions

An ASP session is established when an Internet Explorer instance makes a request to the web server. The session contains data (such as associated with a running instance of FSGuiApp.exe) that the server needs to remember the next time that the same client accesses the server. In order to associate the client request with the server data allocated to the client, a unique ID is returned to the client. The ID is supplied with each subsequent request in the form of a cookie. This cookie is a memory-resident cookie and is lost when the web browser on the client is closed. Starting a new instance of the browser will cause the whole process to begin again with a new ID.

Because sessions are associated with licenses:

- Multiple WebUI frames in a single client browser can share a license.
- Two browsers running in separate sessions will require separate Fourth Shift licenses.

Sessions are assigned by the server:

- A single client browser that contains a portal that accesses multiple servers, may require multiple licenses.

If Frame A accesses WebUI on SERVER1 and Frame B accesses WebUI on SERVER2, there will be two separate sessions created because of the two separate servers. If these servers target the same database, they will require separate licenses when accessing the database.

Terminal Server sessions are not exactly the same as ASP sessions:

- There are other considerations when using Terminal Server frames (see "ASP Sessions and Terminal Server Frames").

Default IIS Settings

During the installation process, a number of scripts are run to set up the IIS configuration using the recommended settings. The following settings are defined and **should not be changed** without the recommendation of Fourth Shift Customer Support.

Portal-Specific Settings

Setting	Value Assigned
Anonymous access	Not allowed
Site access	Challenge/response
Script timeout	90 seconds
Session timeout	20 minutes
Portal database	Prevent download

Fourth Shift WebUI Settings

Setting	Value Assigned
Script timeout	90 seconds
Session timeout	4 minutes
Out of Process	ASP will start new process

Using Multiple Fourth Shift Systems

Each frame that accesses Fourth Shift data must know the location of the data. Each location is defined by the URL address of the server, and the configuration file on that server. These two pieces of information (along with a “friendly” name) are combined to form a **location** that is defined in the **Portal Preferences** page.

Two Fourth Shift systems can be on separate servers and have two different URL addresses, or they can both be on the same server and have the same URL address but different configuration files.

Use the following steps to update or add the Fourth Shift system name in a multiple system environment.

1. On the My Fourth Shift Workplace Welcome screen, click the **Preferences** link in the portal bar.
2. Click **Locations**.

To *update*—Select the portal name from the **Defined Locations** list.

To *add*—enter the new name in the **Location Name** field.

3. Enter the **Configuration file** (FS.CFG) location for the system you wish to use.

If desired, add the system name of the Fourth Shift system to the beginning of the **Location Name**. Be sure to include " – " (a space followed by a hyphen and another space) after the system name.

4. Enter the URL for the workplace server in the **Location URL** field.
5. Click **Update**.
6. Click **Close** to close the Locations window.
7. Repeat these steps for additional locations.

A location must be created for each Fourth Shift system, and each location must define the appropriate configuration file.

8. Click **Close** to close the Preferences window.

Troubleshooting Tips

Active Sessions exist but no users are running

Sessions are terminated by users either by closing Internet Explorer or by using the **Log Off** link on the My Fourth Shift Workplace toolbar. When users close Internet Explorer, the session timeout feature is applied by IIS. This means that there may be up to a 4 minute wait for the session to clear. You may wish to train your users to use the **Log Off** link on the My Fourth Shift Workplace toolbar.

Error Occurs Repeatedly for a Single User

A unique working environment based on session identifier is created each time you start My Fourth Shift Workplace. It is possible that the working environment can become unstable based on a variety of environment factors. You may wish to develop a standard practice of having users close Internet Explorer and starting again to create a fresh working environment before attempting other problem solving.