



Infor Ming.le-LN Plug-in User Guide

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About this Guide

Document Summary

This document describes how to use the Infor Ming.le-LN Plug-in.

A number of screenshots in this document may be based on previous Web UI releases. They can differ slightly from your Infor Ming.le-LN Plug-in screens. However, the described functionality is identical.

Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at <http://www.infor.com/inforxtreme>.

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Infor Ming.le-LN Plug-in is the web based client user interface for various Infor applications, such as:

- Infor LN
- Infor DEM

Infor Ming.le-LN Plug-in requires Infor LN and Enterprise Server 8.7 or higher.

Infor Ming.le-LN Plug-in runs in a page in Infor Ming.le™. This page consists of an application area with an application navigation menu bar.

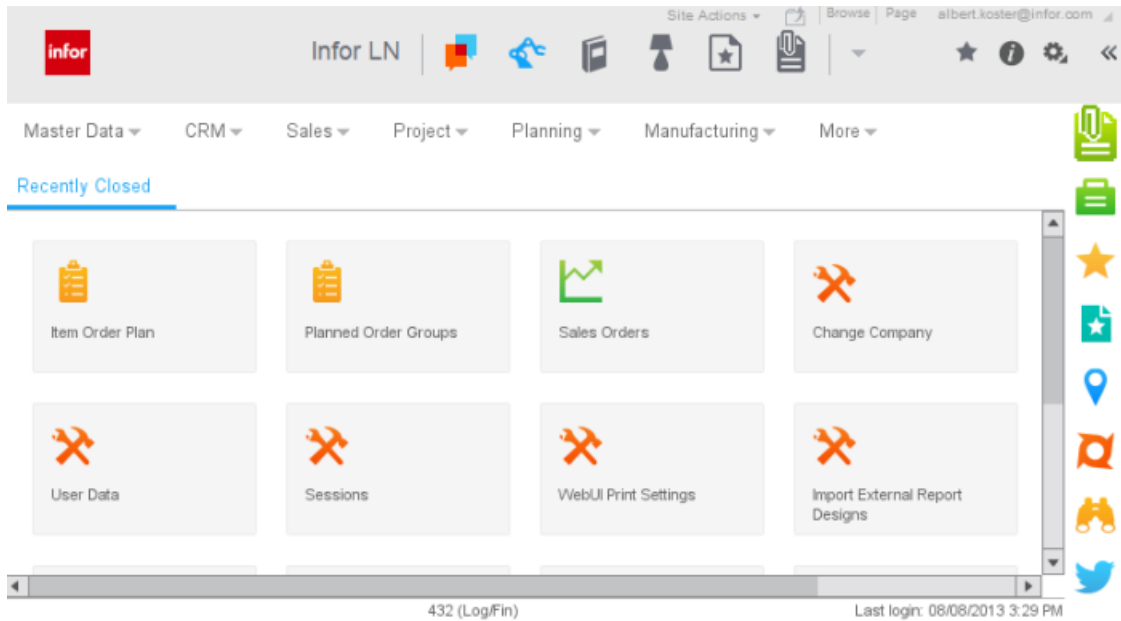
The Infor Ming.le interface includes a panel with icons at the top of the page. These icons activate the display of applications. To open the Infor Ming.le-LN Plug-in, click this icon:



To the right of the application area is a collapsible panel, which hosts a series of context applications, such as LN Navigator, Documentation, Shortcuts, and Maps. Most of these context applications are not specific to the Infor Ming.le-LN Plug-in. They are available in all applications in Infor Ming.le. See the *Infor Ming.le User Guide*.

The support for the context applications and the corresponding Infor Ming.le technology depends on the combination of the LN application version and LN Tools version. See the *Infor Enterprise Server Web UI - Installation and Configuration Guide (U8715)*.

This figure shows the LN page in Infor Ming.le:



Application area

When you start a session, the session is displayed in the application area. At the top of the application area, an application navigation menu bar is displayed.

This figure shows an LN session that is started in the application area:

The screenshot displays the Infor LN application interface for configuring a Demand Management (DEM) process. The main header shows 'Infor LN' and navigation menus for Master Data, CRM, Sales, Project, Planning, and Manufacturing. The current view is 'Item Order Plan' for item 'COM7' (Computer).

Key configuration details include:

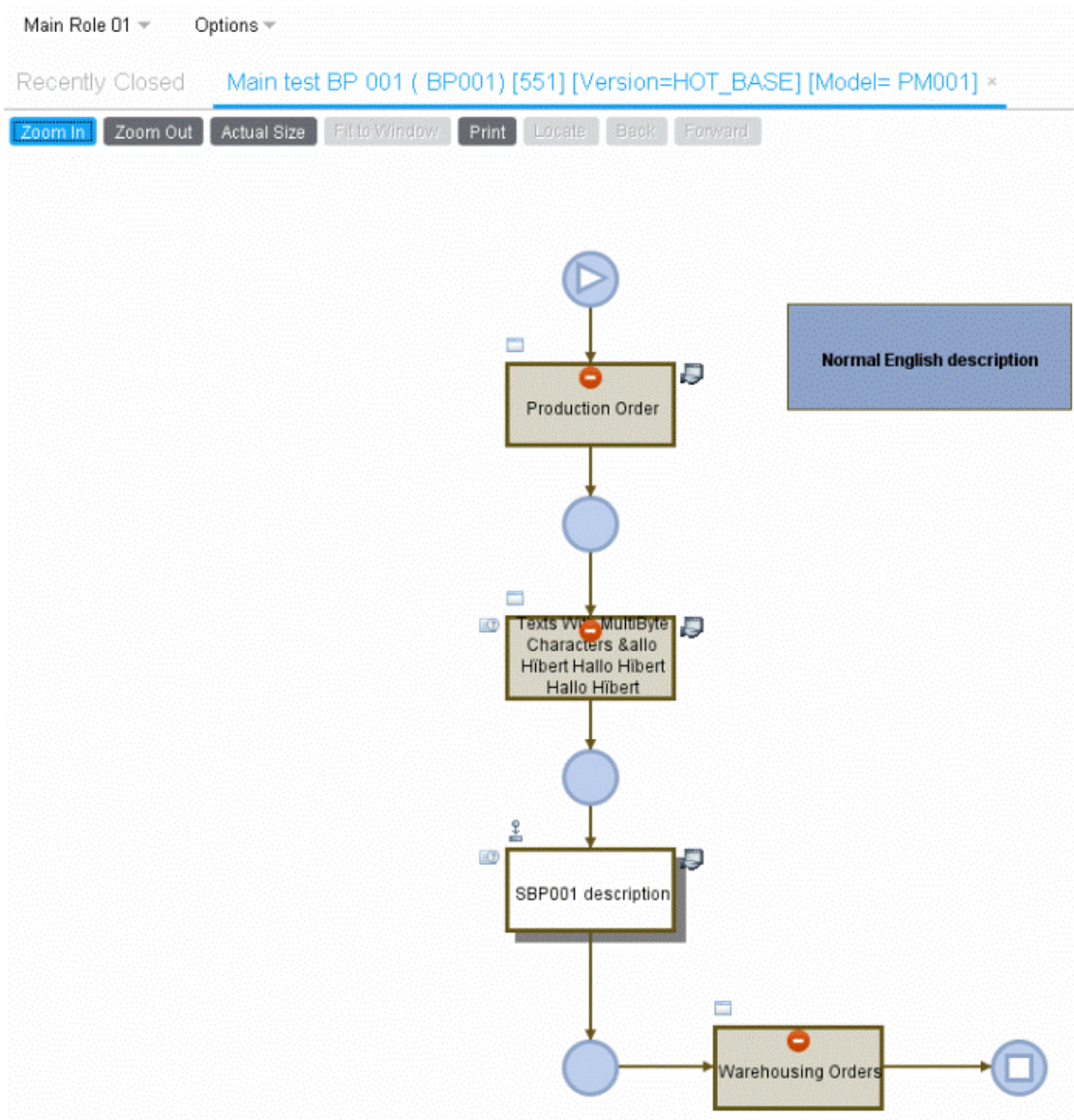
- Scenario: ACT Actual scenario company 402 (Actual) 7 Days
- Plan Item: COM7
- Planner: Computer
- Time Fence: 10/12/2013 12:00 AM
- Forecast Time Fence: 10/01/2013
- Order Horizon: 07/13/2017
- Planning Horizon: 07/13/2017
- ATP Horizon: 10/01/2013
- Net Change Date: (blank)
- Cost Price: 20.0000 EUR
- Actual Supply Source: Purchase
- Total Demand: 0.0000 pcs
- Inventory on Hand: 102.0000 pcs

The 'Overview' tab is active, showing a table of dates and simulated demand values:

Date	Simulate	Order Type	Order Number	Plan Item
10/02/2013	0.0000			
10/09/2013	0.0000			
10/16/2013	0.0000			
10/23/2013	0.0000			

At the bottom of the interface, the status bar shows 'Modify' and 'cprp0520m000 432'.

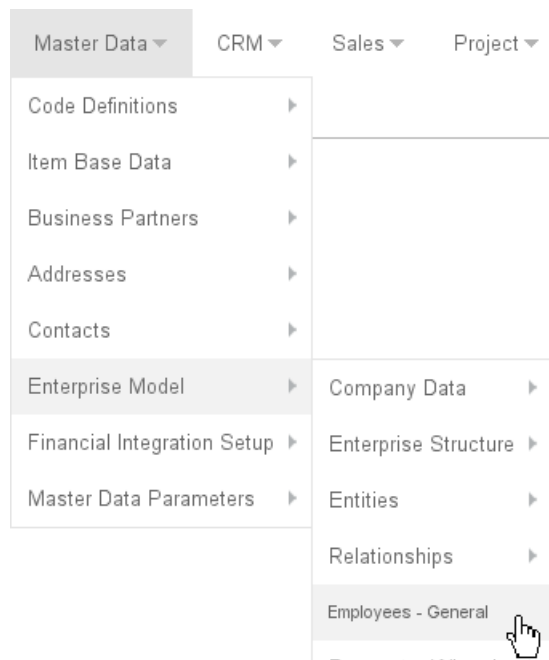
This figure shows a DEM process that is started in the application area:



Application navigation menu bar

This table shows the elements in the application navigation menu bar:

<p>LN menu buttons or DEM navigation buttons</p>	<p>LN menu buttons are displayed if the LN menu browser is selected in your LN user data. Click these buttons to open pull-down menus. These menus are used to browse LN folder trees and start sessions. The menu buttons in the menu bar depend on the start menu in your LN user data.</p> <p>When you click a session on the menu, the session is displayed in the application area and cannot be moved. When you press Ctrl while clicking the session, the session starts in a separate window that can be moved and resized.</p> <p>This figure shows the menu bar with LN menu buttons and pull-down menus:</p>
--	---



DEM navigation buttons are displayed if the DEM process browser is selected in your LN user data.

If there are many menu buttons, a chevron button is displayed at the end of the menu bar. Click this button to display a pull-down menu with the remaining menu options.

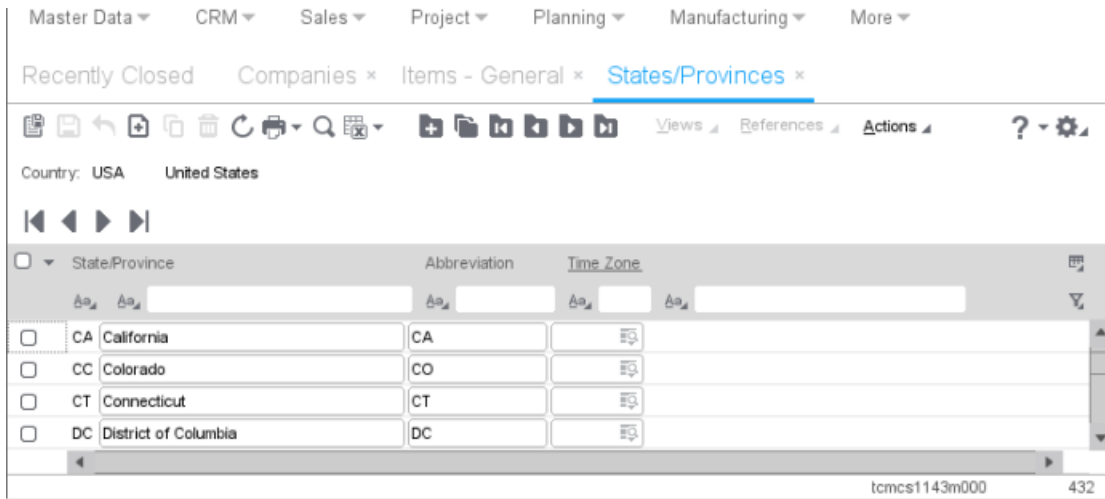
Options menu	This is the latest menu in the menu bar, or in the chevron button's pull-down menu. See "The Options menu" on page 27.
---------------------	--

Session tabs

If you start multiple sessions, only the last session is displayed in the application area. The other sessions are still open. For each open session, a tab is displayed below the application navigation menu bar.

This figure shows an example:

Overview



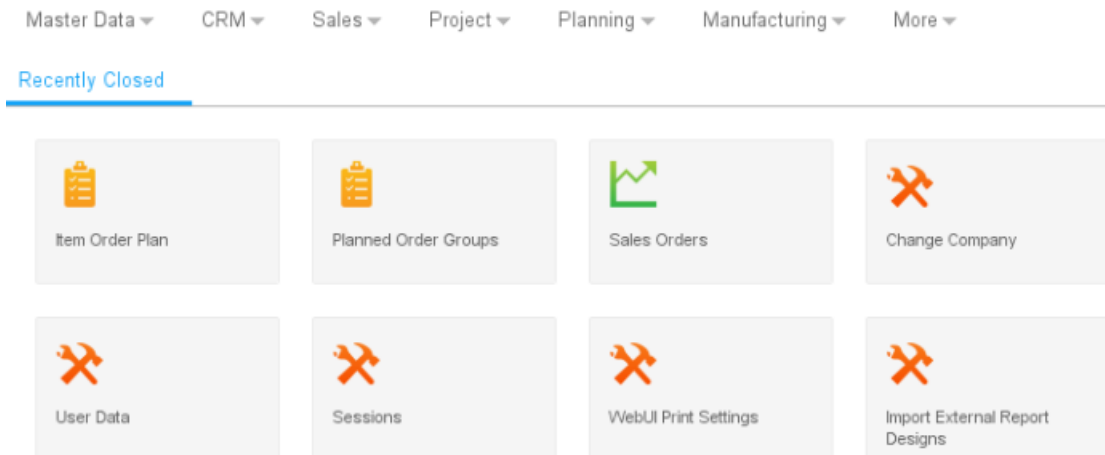
To switch to another open session, click the corresponding tab.

To close a session, click the × icon in the corresponding tab.

Recently closed sessions

Thumbnails of the recently closed sessions are stored in the application area. To view these thumbnails, click the **Recently Closed** tab below the application navigation menu bar.

This figure shows an example:



To restart a session, click the corresponding thumbnail. The session is displayed in the application area and cannot be moved. When you press Ctrl while clicking the thumbnail, the session starts in a separate window that can be moved and resized.

To remove a thumbnail from the list of recently closed sessions, right-click the thumbnail and select **Remove**.

LN Navigator

You can use the LN Navigator context application to navigate to Infor LN applications, and find applications on code or description. To start this context application, in the collapsible panel to the right of the application area, click this icon:



Dependent on your user profile, the **LN Navigator** can contain these tabs:

- **Processes**

This tab contains the DEM Process Browser. Users can navigate to LN applications based on predefined DEM process flows.

- **LN**

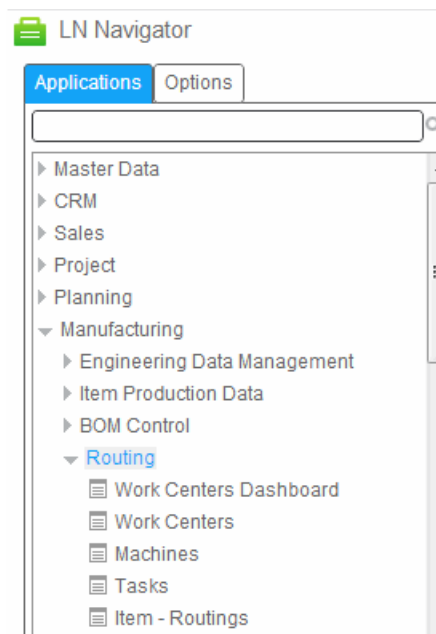
This tab contains a folder tree to navigate through the LN menu structure, and start sessions.

- **Options**

Use this tab to perform these actions:

- Specify a session code in the **Run Program** field, and click **Run** to start the session.
- Click **Change Company** to switch to another LN company number.

This figure shows the **LN Navigator**:



By default, the sessions started from the **LN Navigator** start in the plug-in's application area. You can use these methods to start a session in a separate, floating, window:

- Select the **Open in new Window** check box in the **Options** tab.
- Right-click a session in the **LN** tab and select **Open in new Window**.

- Press the Ctrl key while selecting a session in the **LN** tab.

For details about the installation of the LN Navigator context application, see *Infor LN Role Based Home Pages Administration Guide (U9738)*

Menu bar in sessions

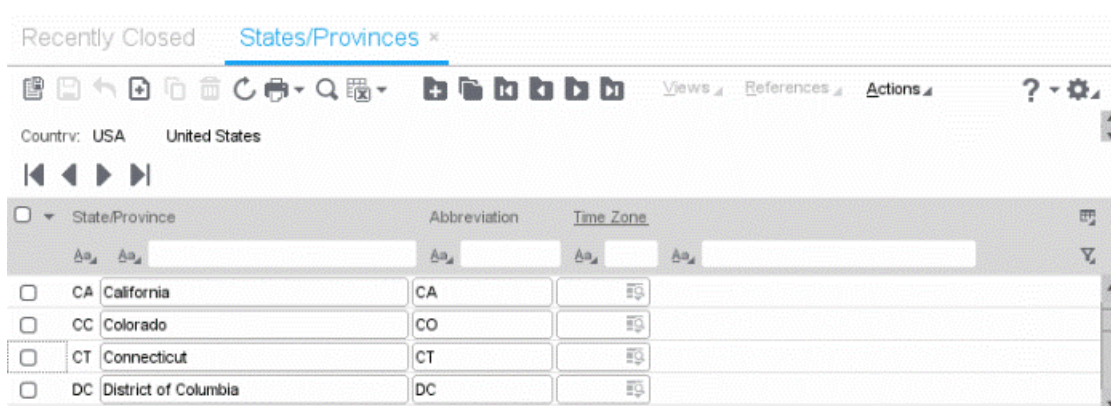
The menu bar of a session contains command buttons and menu buttons.

This figure shows the menu bar in an LN session:



In various sessions, records are displayed per group. In those sessions, the buttons to navigate between groups are displayed at the top of the session. The buttons to navigate between records in the same group are displayed directly above the grid.

This figure shows a session where the records are displayed per group (Country):
























Note:

In sessions with a grid, a check box with a down arrow button is displayed above the grid. See the previous figures. Use this check box, and the options in the down arrow button's menu, to select or unselect all records in the grid.

This table shows the buttons that can be present in a session:

Button	Description	Shortcut key
Save changes and exit	Save the changes made to the record and close the session.	Ctrl+L
Save	Save the changes made to the record.	Ctrl+S

Button	Description	Shortcut key
 Revert to saved	Discard the changes made to the record.	Ctrl+E
 New	Add a new record.	Ctrl+N
 Duplicate	Create a copy of a record.	Ctrl+D
 Delete	Delete the selected record.	Ctrl+Delete
 Update the screen	Show the current record data.	F5
 Print	Print a report. Click the down arrow button to display the available print sessions.	
 Export/Import	Export data to, and import data from, MS Excel. Click the down arrow button to display the available sessions. See "MS Excel integration" on page 51.	
 Find	Starts the Find session, which you can use to specify search criteria to find a record. You can only specify search criteria for fields that are currently visible.	Ctrl+F
 First record(s)	Jump to the first record(s).	Ctrl+Home
 Previous record(s)	Jump to the previous record(s).	Page Up
 Next record(s)	Jump to the next record(s).	Page Down
 Last record(s)	Jump to the last record(s).	Ctrl+End
 New View	Create or find a group of records that all have the same value for one or for a few specific fields. These fields are displayed at the top of the session. You can zoom to the appropriate session to select the group record. To add new records to a group, press Ctrl+N or click New ().	Ctrl+V

Button	Description	Shortcut key
 Copy records from one view to another	Copy a range of records from the current group to another group. After clicking this button, complete these steps: <ol style="list-style-type: none">1 Select the first record to be copied.2 Select the last record to be copied.3 Specify the group to which the records must be copied.	
 First View	Show the records of the first group.	
 Previous View	Show the records of the previous group.	Shift +Page Up
 Next View	Show the records of the next group.	Shift +Page Down
 Last View	Show the records of the last group.	
Views	Contains standard commands for LN sessions. See the "Basic Tasks" section in the Infor Web Help.	N/a
References	Contains commands that are specific to the current session. These commands usually start related sessions and special functions.	N/a
Actions	Contains standard commands for LN sessions and commands that are specific to the current session. The session-specific commands usually start related sessions and special functions.	N/a
 - Help	Shows the online help for the current session. The button's pull-down menu contains this command: <ul style="list-style-type: none">• Properties (CTRL+SHIFT+8) Shows the session properties. See "Viewing session properties" on page 58.	F1
	Opens a menu with commands to personalize the session, define conditional formatting, define customer defined fields, etc. See: <ul style="list-style-type: none">• "Personalizing sessions" on page 44• "Conditional Formatting" on page 49• "Customer defined fields" on page 56	N/a

Note:

The menu bar can contain additional pull-down menus that are specific to the current session.

Signing on and signing out

Signing on

To sign on to the Infor Ming.le-LN Plug-in:

1 Sign on to the Infor Ming.le

Open your internet browser and enter the Web address of the Infor Ming.le. The Infor Ming.le URL has this format:

```
https://[hostname]:[port]/SitePages/InforSuite.aspx.
```

Ask your Infor Ming.le administrator for details.

You are automatically signed on, using your MS Windows user account and password.

2 Open the Infor Ming.le-LN Plug-in

To open LN, click the **LN** icon.

Depending on user profile settings, one of these situations occurs:

You do not yet have a user profile.

You are prompted to create a user profile.

Click **New** to create a profile. See "Creating user profiles" on page 31. After creating a profile, you must select and open the new profile.

You have one or more user profiles, and you did not specify to always use the default profile.

The available profiles are displayed.

To sign on:

- 1 Select a profile in the selection dialog.
- 2 Select **Next time use this User Profile automatically**. From now on, the profile selection will be skipped during sign on.
- 3 Click **Open**.

If you want to enable the profile selection again, unselect the **Use default User Profile on next login** option in the **Options** menu in the Infor Ming.le-LN Plug-in.

You have a default user profile, and you specified to always use this profile

You are logged on to the server. During the log on process, the last login date and time are displayed. This is useful, for example, to check if somebody used your user account during your absence. Once you are logged on, the last login date and time are displayed in the status bar below the application area.

Signing out

To sign out from the Infor Ming.le:

- 1 In the right-upper area of the Infor Ming.le, click your user name to display a pull-down menu.
- 2 Select **Sign Out**. A message is displayed to inform you that you must close your browser.
- 3 Close your browser to complete the sign out process.

Keyboard shortcuts

2

This section summarizes the common *keyboard shortcuts* you can use in the Infor Ming.le-LN Plug-in.

Options menu

This table shows keyboard shortcuts for actions that are available in the **Options** menu in the Infor Ming.le-LN Plug-in menu bar:

Action	Shortcut	Action	Shortcut
Start session	Alt+F5	System message	Alt+F12
Change company	Alt+F7	Restart	Ctrl+Alt+R

Menu navigation

This table shows keyboard shortcuts that you can use in the menus in the Infor Ming.le-LN Plug-in menu bar and in the menu bar in sessions:

Action	Shortcut	Action	Shortcut
Open menu	Alt+letter This command is only available in sessions.	Close submenu	Left Arrow
Navigate between menus	Left Arrow Right Arrow	Open selected menu item	Enter Spacebar
Navigate within menu	Up Arrow Down Arrow	Close menu	Esc
Open submenu	Right Arrow	Open menu item	Letter

Sessions

Sessions

This table shows the keyboard shortcuts that you can use in sessions:

Session Type	Action	Shortcut	Action	Shortcut
General	Close session	Ctrl+Q	Refresh	F5
	New	Ctrl+N	First record(s)	Ctrl+Home
	Open	Ctrl+O	Previous record(s)	Page Up
	Save	Ctrl+S	Next record(s)	Page Down
	Save and close	Ctrl+L	Last record(s)	Ctrl+End
	Revert to saved	Ctrl+E	Calendar	F2
	Print	Ctrl+P	Rotate currency	Ctrl+R
	Find	Ctrl+F	Help current session	F1
	Duplicate	Ctrl+D	Texts	Ctrl+T
	Copy to clipboard	Ctrl+C	Previous group	Shift+Page Up
	Delete	Ctrl+Delete	Next group	Shift+Page Down
Print session	Execute standard command	Enter	Close dialog without result	Esc
Zoom session	Close session without result	Esc	Close session with result	Enter

Satellite sessions

This table shows keyboard shortcuts that you can use in related sessions (satellites) that are situated on the lower part of the screen of a Multi Main Table session:

Action	Shortcut	Note
Satellite texts	Ctrl+W	Ensure the current focus is inside the satellite.

See "Multi Main Table sessions" on page 39.

Grids

This table shows the keyboard shortcuts that you can use in grids:

Action	Shortcut	Action	Shortcut
Go to the beginning of the selected data sheet	Ctrl+Home	Select row line without opening the item	Spacebar

Action	Shortcut	Action	Shortcut
Go to the end of the selected data sheet	Ctrl+End	Start detail session from selected row	Enter This shortcut does not work in Baan IV.
Go to previous set of data	Page Up	Select all rows	Ctrl+A
Go to next set of data	Page down	Deselect all	Spacebar
Go to previous item (row)	Up Arrow	(De)select multiple rows	Ctrl+Alt+Spacebar
Go to next item (row)	Down Arrow	Activate generic jframe menu	Alt+Spacebar
Select current row	Ctrl+Spacebar	Focus on first displayed row	Ctrl+Up Arrow
Go to next editable field	Tab The row header is skipped. If you press Tab in the last editable field of the last visible row, the next row is displayed. This shortcut does not work in Baan 5 and Baan IV.	Focus on last displayed row	Ctrl+Down Arrow
Go to previous editable field	Shift+Tab The row header is skipped. This shortcut does not work in Baan 5 and Baan IV.		

Session tabs

This table shows the keyboard shortcuts that you can use in tabs in sessions:

Action	Shortcut
Switching tabs	Left Arrow Right Arrow First press Tab or Shift+Tab to put focus on the tab. Then use the arrow keys.

Fields

This table shows the keyboard shortcuts that you can use in fields in sessions.

Field type	Action	Shortcut
Fields with a browse button	Start a zoom session from the field	Ctrl+B F4, Baan IV only

Keyboard shortcuts

Field type	Action	Shortcut
Fields with a list box	Open list box	F4 Down Arrow Alt+Down Arrow
	Select item in list box	Up Arrow Down Arrow First letter of item
	Close the list box that is open	ESC Enter Tab Shift+Tab
Date fields	Start a calendar from the field	Ctrl+B F4, Baan IV only
	Change day/month/year independently	Up Arrow Down Arrow First press Right Arrow or Left Arrow to set focus on day, month, or year.
Time fields	Change hours, minutes, seconds, and AM/PM independently	Up Arrow Down Arrow First press Right Arrow or Left Arrow to set focus on hours, minutes, seconds, or AM/PM.
Check boxes	Select or clear the check-box	Spacebar
Radio buttons	Select next option	Down Arrow
	Select previous option	Up Arrow

Dialogs

This table shows the keyboard shortcuts that you can use in dialogs that you can start in sessions:

Dialog type	Action	Keyboard shortcut
Calendar dialog	Navigate inside the calendar	Up Arrow Down Arrow Left Arrow Right Arrow
	Change the years	Up Arrow Down Arrow
Find dialog	Close dialog without result	Esc
	Close dialog with result	Enter

Switching between sessions or DEM processes

This table shows the keyboard shortcuts to switch between running sessions or DEM processes:

Action	Shortcut	Note
Display a list of open sessions or DEM processes	Ctrl+Tab	You must hold the Ctrl key. If the current focus is inside a tab in a session, the list also displays the available tabs. To switch to another session or tab, select the corresponding item from the list. To close the list, release the Ctrl key.
Next session Next tab Next DEM process	Ctrl+Tab	You must immediately release the keys.
Previous session Previous tab Previous DEM process	Ctrl+Shift+Tab	You must immediately release the keys.
Next session	Ctrl+Alt+Tab	This shortcut does not work in Windows 7.
Previous session	Ctrl+Alt+Shift+Tab	This shortcut does not work in Windows 7.

The Options menu

The **Options** menu contains these options:

Run Program (Alt+F5)

Starts the Run Program dialog, where you can start sessions or Web pages.

To start a session or a web page from this dialog:

- 1 Enter the desired session code or URL.
- 2 Select "Infor LN" or "Internet" from the list.
- 3 Click **OK**.

- **Note**

- In the **Open** field, you can select previously started sessions or URLs from the list.
- When you type a session code or URL, Web UI automatically selects the appropriate value, "Infor LN" or "Internet", from the list.
- If the **Open in new Window** check box is selected, the session starts in a separate, floating, window. If this check box is cleared, the session starts in the Infor Ming.le application area.
- Web pages start in separate Internet Browser windows.

Cache Menu

Stores your LN startup menu, which is displayed in the application navigation menu bar, on your computer. This is useful in a WAN environment. The next time you sign on, the menu is loaded faster. If the menu is changed on the LN server, you must select **Options > Refresh Menu** to refresh the menu on your computer.

Note:

This setting only applies to the Infor LN menu. The Enterprise Modeler (DEM) menu in the **Processes** menu panel is never cached and is automatically refreshed with the latest changes.

Change Company (Alt+F7)

Starts the Change Company session. See "Changing the company number" on page 37.

Select Activity

Use this option if you want to test software components that are checked out to an Infor LN Studio activity.

If this option is selected, the Debug and Profile 4GL (ttadv1123m000) session starts. Use this session to select the activity that contains the component you want to test. See the session help and the LN Studio documentation.

Change Data Language

This option is only available if Multi Language Fields Support is enabled on your LN server. See "Multi language application data" in the Enterprise Server Web Help.

If you select **Change Data Language** the Change Data Language (ttask2006m000) session starts.

You can use this session to switch to another data language. In this way, you can view and edit data in multiple languages in sessions that are multi language enabled.

If you change the data language, the next session you start will run in the new data language. The sessions that were already opened remain in the old data language.

Note:

- Web UI displays the current data language in the status bar of each session, next to the company number.
- You can only switch to another data language if the **Switch Data Languages** check box in your user data template properties on the LN server (User Data Template (ttams1110m000) session) is selected.

System Message (Alt+F12)

Displays the current System Message.

Show Mandatory Indication

If you select **Show Mandatory Indication**, Web UI displays an asterisk behind the labels of the mandatory fields in sessions.

Note:

- By default, Show Mandatory Indication is turned off. The option is stored in your Web UI user profile.
- This option is only available in LN.

Non-interrupting Message Mode

Use this option to change the message mode:

- If this option is selected, LN uses the Non-interrupting message mode: Data you enter in a field automatically validates when you move to a new field. LN displays the messages in a separate Messages window without interruption to your work.
- If this option is not selected, LN uses the Interactive message mode: Data you enter in a field automatically validates when you move to a new field. LN displays any messages prompted by a

field's validation in a message box. You must click **OK** to close the message box and continue your work.

Auto Complete Settings

Starts the Auto Complete Settings dialog.

Use this dialog to specify the following settings:

Auto Complete Enabled	Use this check box to enable/disable the Auto Complete feature. If this check box is selected, the Auto Complete database will be filled and updated and an Auto Complete list will be shown on fields with zoom functionality.
Maximum number of entries	The maximum number of possibilities that will be shown in the Auto Complete list.

See "Auto Complete" on page 42.

Show Mouse Over in Grid

If this option is selected, the background color changes when you hover the mouse pointer over rows in a grid. This color change may adversely affect the performance.

Open Sessions in New Window (Alt+F9)

If this option is selected, sessions started from the Recently Closed panel or from the navigation menu are opened in a new window.

This setting is stored in your user profile.

Debug Bshell

Starts the Run time debugging of bshell (ttstpbshdebug) session.

Use this session to set or modify the various bshell debug options **on runtime**. See the session help.

These bshell debug options can also be set **before runtime** in the **Command** field in the Bshell Environment dialog. To do this, you must modify the configuration settings of the application in your user profile. See "User Profiles" on page 30.

Restart

Restarts Web UI. In this way you can easily log off and log on again. You are not prompted for your user name and password. This is useful, for example, after a change in the user data when the bshell must restart to load new settings.

Note:

- If any programs, such as LN sessions, are running, the system asks you for confirmation.
- Running programs are closed.
- Any unsaved changes will be lost.

Show Excluded Sub Business Processes

If this option is selected, Web UI displays the following:

- Business Processes that are part of your DEM role.
- Business Processes that are not part of your DEM role.

If this option is not selected, only Business Processes that are part of your DEM role are displayed.

Show Only Main Processes

If this option is selected, Web UI displays only main Business Processes.

If this option is not selected, main Business Processes and sub processes are displayed.

DEM Company always same as ERP company

If this option is selected, the DEM company always follows the LN company. When the LN company is changed, the DEM company automatically changes as well. See "Changing the DEM Company" on page 37.

By default, this option is turned off.

Use default User Profile on next login

If this option is selected, your default Web UI user profile is used automatically the next time you log on. So the User Profiles selection dialog will be skipped during the login.

If this option is not selected, you will be prompted to select a user profile during the next login.

About

Starts a dialog that displays the following:

- Web UI version
- Web UI Server
- User
- User profile
- Bshell environment command(s) of the user profile
- Infor LN environment
- Host name
- And so on

User Profiles

A user profile is a way for Web UI to store personalizations, such as:

- Skin, language, and font of the Web UI.
- Selected applications, including their configuration.

The system administrator decides whether you can create/modify user profiles.

Creating user profiles

To create a user profile:

- 1 Unselect the **Use default User Profile on next login** option in the **Options** menu in the Infor Ming.le-LN Plug-in.
- 2 Sign out from Infor Ming.le and sign on again. See "Signing on and signing out" on page 19.
- 3 Click the **LN** icon. A selection dialog box is displayed.
- 4 Click **New** to open the Create new User Profile dialog box.
- 5 Add a user profile and configure the settings for the selected application. See "Specifying properties for a user profile".

Changing user profiles

To change a user profile:

- 1 Unselect the **Use default User Profile on next login** option in the **Options** menu in the Infor Ming.le-LN Plug-in.
- 2 Sign out from Infor Ming.le and sign on again. See "Signing on and signing out" on page 19.
- 3 Click the **LN** icon. A selection dialog box is displayed.
- 4 Select a profile and click **Modify** to open the User Profile dialog box.
Change the user profile settings and, optionally, the configuration settings of the selected application. See "Specifying properties for a user profile".
- 5 Click **OK** to save the changes.

Specifying properties for a user profile

- 1 Add a user profile

In the Create new User Profile dialog box, enter a user profile name and select the following:

- Skin
- Language
- Font
- Fixed font

- The preferred application.
- 2** Configure the settings for the selected application
Complete the following steps:
 - 1** Click **Configure**. The Bshell Environment dialog appears.
 - 2** Enter the name of the bshell and, optionally, one or more bshell commands.
Click **Next**. If DEM is configured for the selected environment, the Dynamic Enterprise Modeling Configuration dialog appears.
 - 3** In the **Company** pane, select a company. Then, in the **DEM Model** pane, select the related DEM model.
Click **Next**. If Workflow is configured for the selected environment, the Infor Workflow dialog appears.
 - 4** Specify the Workflow server, user name, and password.
Click **Next**. The Verify Configuration dialog appears.
 - 5** Verify the settings. If necessary, go back to the previous dialogs and change the settings.
Click **Finish** to store the configuration and to return to the Create new User Profile dialog.
 - 3** Save the user profile
Click **OK** to save the new user profile and to return to the Select User Profile dialog box.
The user profile is now visible and available.

Choosing an environment

An environment consists of a server and an available application on that server.

Depending on the log-in configuration your system administrator chooses, you may have to choose an *environment* during login.

The Select User Profile dialog box

This dialog box displays the available Web UI user profiles.

The dialog box contains the following options:

Open	Opens Web UI with the selected user profile.
Modify	Starts a dialog where you can modify the selected user profile. If you click OK or Cancel , you can return to the Select User Profile dialog box.
Remove	Removes the selected user profile. If you click OK , you must confirm removal of the user profile. If no user profiles remain, you are prompted to create one.

Copy	Creates a copy of the selected user profile.
New	Creates a new user profile.
Cancel	Closes the Select User Profile dialog box.

Starting a web page

You can use these methods to start a web page in Web UI:

- Select **Options > Run Program**. Select "Internet" and specify the web page you want to start.
- Click a hyperlink in a form field or in the LN Text Editor. See "Hyperlink support" on page 33.

Hyperlink support

If a text-based form field only contains a URL, Web UI can perform a hyperlink action.

For example:

- <mailto:info@techwrite.com>
- <http://www.techwrite.com>

Web UI also supports "http://www." and "mailto:" links in the LN Text Editor.

The text of the links is underlined.

When you click an "http://www." link, the corresponding web page is opened in your default internet browser.

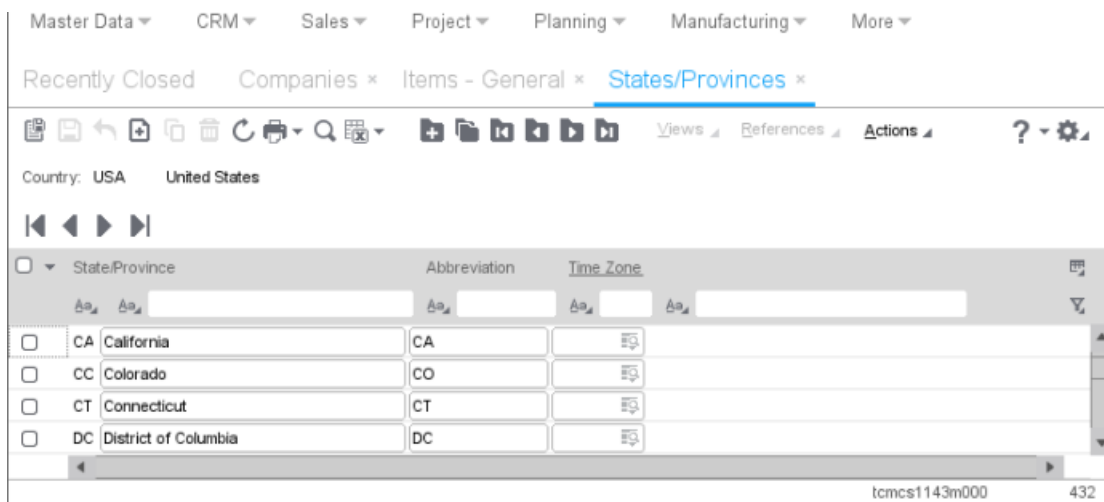
When you click a "mailto:" link, a new e-mail starts in your default e-mail program.

Switching to other sessions

Session tabs

If you start multiple sessions, only the last session is displayed in the application area. The other sessions are still open. For each open session, a tab is displayed below the application navigation menu bar.

This figure shows an example:



To switch to another open session, click the corresponding tab.

To close a session, click the × icon in the corresponding tab.

You can use keyboard shortcuts to switch between running sessions.

Note: You can also switch between running DEM processes. See "Starting a DEM process" on page 65.

Switching between sessions or DEM processes

This table shows the keyboard shortcuts to switch between running sessions or DEM processes:

Action	Shortcut	Note
Display a list of open sessions or DEM processes	Ctrl+Tab	You must hold the Ctrl key. If the current focus is inside a tab in a session, the list also displays the available tabs. To switch to another session or tab, select the corresponding item from the list. To close the list, release the Ctrl key.
Next session Next tab Next DEM process	Ctrl+Tab	You must immediately release the keys.
Previous session Previous tab Previous DEM process	Ctrl+Shift+Tab	You must immediately release the keys.
Next session	Ctrl+Alt+Tab	This shortcut does not work in Windows 7.
Previous session	Ctrl+Alt+Shift+Tab	This shortcut does not work in Windows 7.

Shortcuts

You can create shortcuts that provide links to LN sessions. The shortcuts are displayed in the Shortcuts context application. See the *Infor Ming.le User Guide*.

Finding records in a session

- 1 Press Ctrl+F.
The Find dialog starts.
- 2 If multiple indices are available, select the desired index in the left part of the dialog.
The dialog shows the corresponding input fields.
- 3 Enter (part of) the desired code or value in at least one field.
If you enter values in more than one field, LN searches for records that match all the criteria. Find does not distinguish between uppercase and lowercase letters.
- 4 To start the search, click **OK**.

When the search is finished, the Find dialog box is closed. The first record found is the first record listed. If no records were found, the nearest matching record is shown.

Changing the company number

In Web UI the change company functionality is available on the **Options** menu. If you change the company here, the next session you start then starts in the new company. The sessions that were already opened remain in the old company.

Note:

Your administrator can give each company a different color, which enables the user to more easily distinguish between companies

Changing company can be a problem if you have both a DEM authorization and an Infor LN or Baan authorization. You might be authorized by the Infor LN or Baan authorization for companies that you cannot use in combination with *DEM*. In DEM navigation, you can only switch to those companies that have specified the same *central modeling company* as defined in your user profile. If the central modeling company differs from the company in your user profile, you can no longer start sessions from the DEM tree. Ask your system administrator to change your user profile.

Changing the DEM Company

Definitions

LN Company (ERP Company)

Company as defined in the User Data. Can be overruled through a **Change Company** action (accessible through the **Options** menu).

This company applies to the menu navigation.

DEM Company

Company as used by DEM. The DEM Company is related to a DEM Project Model.

You select the DEM Company and the Project Model when you create a Web UI user profile.

The DEM Company always same as ERP company setting

The **DEM Company always same as ERP company** setting determines whether DEM automatically follows the LN company.

The setting is available in the **Options** menu. By default, the setting is turned off.

Allowed values

- Not selected

This is the default behavior. A switch to another company (through the **Change Company** option in the **Options** menu) implies only a company switch for the LN company. So if LN is enabled, only the LN company changes.

If only DEM is enabled, a **Change Company** does not affect the DEM company. Sessions, started from the Business Process Diagram are still started from the DEM company.

- Selected

The DEM Company follows the LN company. So when you perform a **Change Company**, Web UI will also change the DEM company.

The DEM company is related to a Project Model; therefore also the correct Project Model must be selected. Web UI selects the Project Model of the new company in the following way:

- First Web UI tries to use the Project Model of the old company.
- If this Model does not exist for the new company, Web UI uses the default Project Model.
- If there is one Project Model available, Web UI uses this one.
- If there are multiple Project Models, Web UI displays a dialog where you must select the Project Model.

Note: After you performed a Change Company, the new company (and Model) are not saved in the Web UI user profile. So when you do a re-connect, you will come back in the original companies.

Paperclip icon

In various sessions, you can attach documents to records. For example, you can attach documents to BOM lines.

If a record has an attachment, a paperclip icon is displayed before the corresponding row in the grid.

To attach a document to a record, or to view the already attached documents, click the paperclip icon in the toolbar.

See "Document Management" in the LN online help.

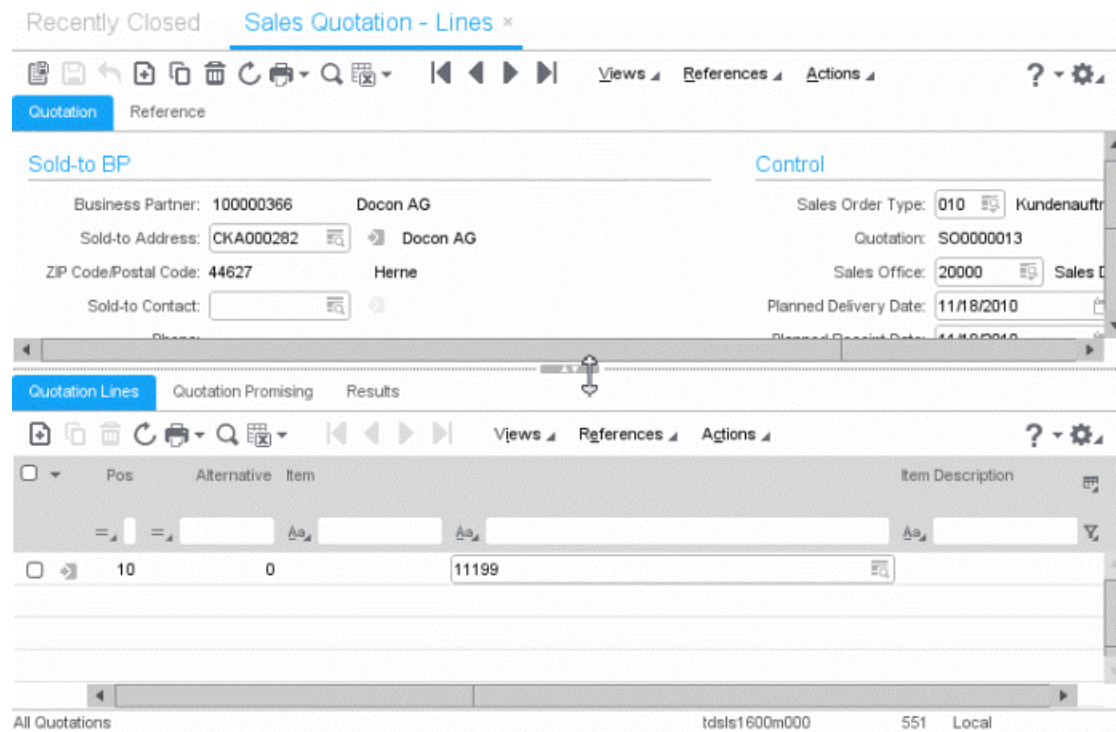
Draggable splitter bar

Various sessions contain a draggable splitter bar that separates different areas in the session window. For example, the Sales Quotation - Lines session contains a splitter bar that separates the details in the upper part of the window from the data in the lower part of the window.

You can drag the splitter bar to resize the areas in the session window to your needs.

Any tab titles at the top of a window area always remain visible, even if you browse to the bottom of that area.

This figure shows a session with a splitter bar:



Multi Main Table sessions

Web UI supports Multi Main Table (MMT) sessions.

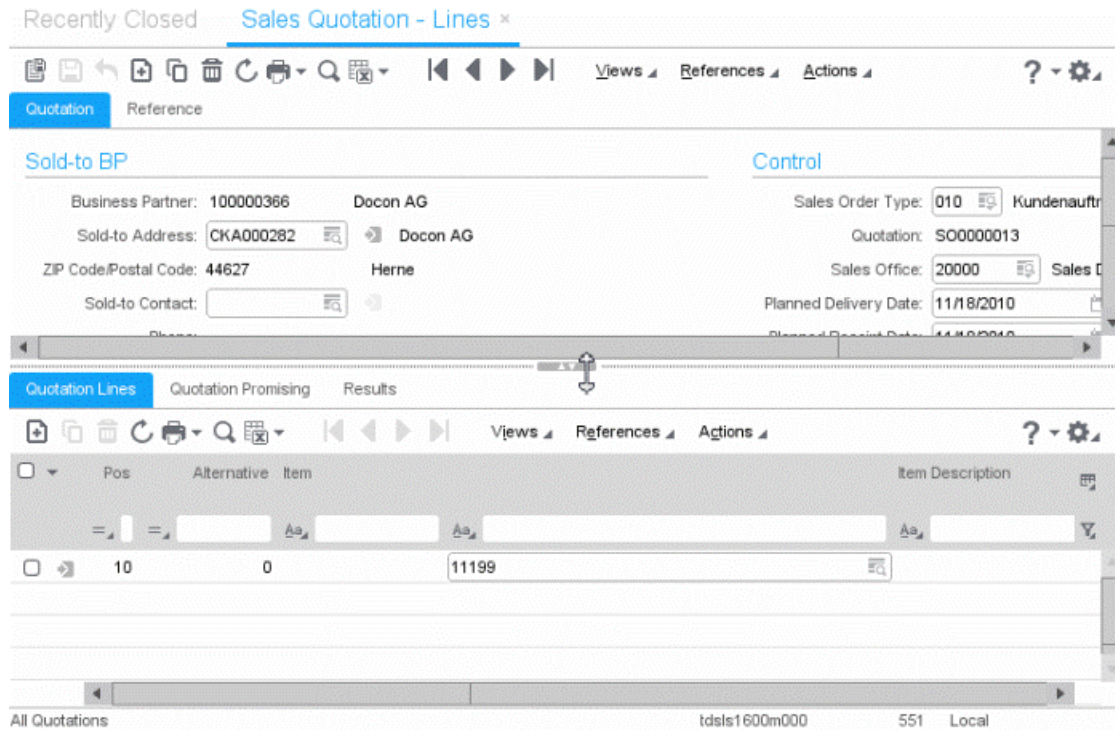
The Multi Main Table session is designed to improve the ease of use with the application. Multiple sessions are comprised into one to limit the number of sessions you must open in your daily work. In an MMT session, you can enter, change, and delete data. The MMT session provides you a quick overview of all your relevant information.

The Multi Main Table session consists of two parts:

- *The header session:* The coordinating session. A Multi Main Table session contains only one header session. The header session is situated on the upper part of the screen.

- *The related sessions:* The session types that can be available in each MMT session. The related sessions are situated on the lower part of the screen.

This figure shows an MMT session, in which various sessions are combined:



MMT functionality

The MMT session type can have a deep copy or delete function. Deep copy or delete in an MMT session means you copy or delete data of both the header and all lines within all related sessions.

In MMT sessions an implicit save is active, your data is saved if you:

- Change focus from header session to related session.
- Change focus from related session to related session.

Filtering

This topic describes how to use filtering to limit the number of records on your screen.

The Filter menu

To apply a filter in a session, open the **Filter** menu. To do this, complete one of the following steps:

- On the session's **View(s)** menu, click **Filter**.
- Click this icon:



The **Filter** menu contains the following options:

- Advanced Filtering
- Save As
- None
- Easy Filtering
- Instant Filtering
- Match Case

The menu also displays the filters you saved.

Advanced Filtering

To delete or modify a saved filter, click **Advanced Filtering**. The Filters (ttadv9593m000) session starts. In this session, you can delete the filter or set additional filter options to refine the filter. For details, refer to the session help.

Save As

Select this option to save the currently active filter.

None

Select this option to disable the currently active filter.

Easy Filtering

You can enter filter criteria in the input fields above the grid. On alphanumeric fields, you can specify the wildcards * or ?. On alphanumeric fields and on numeric fields, you can specify the operators >, <, <=, >=, <>. You should not specify operators and wildcards in the same field.

On date fields, it is possible to use a relative date, for example `-7` showing records with a date of 7 days ago.

You can also perform advanced filtering: filter a particular value, and then refine your filter by setting a new value on the filtered data.

Note:

The number of fields for which easy filtering is available, depends on LN configuration settings. See the online help of the Maintain Parameters (ttaad0100m000) session.

Instant Filtering

Instant Filtering means that the filter will be applied immediately when you tab out of a field in the easy filter area.

You can switch Instant Filtering on or off in the **Filter** menu.

If Instant Filtering is switched off then the filter will be applied when you press ENTER in the easy filter area, or when you leave the easy filter area.

Match Case

Select this option to make the filter case sensitive.

Example

You switched on the Match Case option, and you enter the filter value "ABC" for a column. The session only displays records where the column contains "ABC" in uppercase. Records where the column contains, for example, "abc" or "Abc", are hidden.

You can switch Match Case on or off in the **Filter** menu.

Auto Complete

This topic describes how you can configure and use the Auto Complete feature.

Introduction

Auto Complete enables you to partially fill in a field, and then select the appropriate item from a list.

Auto Complete is available on fields for which a zoom session has been defined (only if the corresponding table field has a relation with another table).

Fields that support Auto Complete have a special zoom button with a pull-down arrow.

Note:

Auto Complete is not available on segmented fields.

Configuring Auto Complete

To configure Auto Complete:

- 1 On the **Options** menu, click **Auto Complete Settings**. The Auto Complete Settings dialog starts.
- 2 Select the **Auto Complete Enabled** check box and specify the remaining Auto Complete settings.

Using Auto Complete

To start Auto Complete on a zoom field, partially fill in the field and then press **TAB**. If Auto Complete is enabled and there are matching items, a list with matching items will be shown. See the following example.

Example

You enter "I" in the **Locale** field of the Device Data session, and then press **TAB**. A list of locales starting with "I" is displayed.

Points of attention

- The Auto Complete list can only display a limited number of entries, depending on your Auto Complete settings. If there are more matching items, a **More** button is displayed at the end of the list. This button triggers the same zoom functionality as the zoom button.
- An item will match if the primary key (code) of the related table starts with the entered value.
- If the field has been set up to be able to do a search on description, also the items that have a description starting with the value entered will be shown.
- The look-up is case insensitive.
- If more characters are entered in the field the look-up will be narrowed.
For example: In the Departments field in the Employees session, you enter "0" and then press **TAB**. The list shows departments starting with "0". Then, you enter "1". The list now shows departments starting with "01".
- The list shows items that have currently been used (displayed or entered). Therefore, the item does not have to be valid in the current situation on the session.
- If an item is selected in the list, the value will be selected (copied to the field), if you press **TAB**, or click on another field.
- To close the list, press **ESC**.

Personalizing sessions

Introduction

You can personalize sessions to your own preferences. You can perform these actions:

- Personalize Form
- Personalize Toolbar
- Personalize the fields in an overview session
- Hide fields on the fly in details sessions (for LN back-ends with Enterprise Server 8.7.1 or higher)
- Move grid columns on the fly
- Miscellaneous actions
- Export and import personalizations (for LN back-ends with Enterprise Server 8.7.1 or higher)

Personalize Form

Use this option to hide/unhide form fields and change field labels.

You can only use this option if the **Application Personalization** check box in your user data template properties on the LN server (User Data Template (ttams1110m000) session) is selected.

In overview sessions, you can use this option to personalize view fields and columns in the grid.

To personalize a form:

- 1 On the session's menu bar, click this button:



- 2 Select **Personalize Form**

The Personalize Grid session starts.

- 3 Personalize the form.

You can perform various actions, such as:

- Format fields (Bold, Italic, etc.).
- Change the label texts of fields.
- Hide or unhide fields.
- Change the order of fields.

See the online help of the Personalize Grid session.

- 4 Save the changes and close the Personalize Grid (ttadv9210m100) session.

Personalize Toolbar

You can move and hide buttons directly in the toolbar. You can also define various personalizations through the **Personalize Toolbar** command.

Move and hide buttons directly in the toolbar

To change the sequence of the toolbar buttons, you can drag buttons to another location in the toolbar. You can drop a button before or after another button. You cannot drop a button on another button.

To hide a toolbar button, right-click the button and select **Hide button**.

Personalize Toolbar command

To personalize the toolbar:

- 1 On the session's menu bar, click this button:



- 2 Select **Personalize Toolbar ...**.

The Personalize Toolbar session starts.

- 3 Personalize the toolbar.

You can perform various actions, such as:

- Hide or unhide commands.
- Change the order of commands.
- Link icons to non-standard commands, which are displayed in the **Actions** menu, the **View** menu, and other menus. The icons are displayed in the toolbar.
- Add extra space between toolbar buttons.

See the online help of the Personalize Toolbar session.

Personalize menus

Use this option to personalize the session's menus. You do not need any authorization to use this option.

For example, you can hide/unhide commands in these menus:

- **Search** button menu
- **Actions** button menu
- **References** button menu
- **Print** button menu

You can also set one of the actions in the **Print** menu as default action. The default action is indicated by a green dot. If you click the **Print** button, this default action is executed.

To personalize the session's menus:

- 1 On the session's menu bar, click this button:



- 2 Select **Personalize Menu ...**.

The Personalize Menu session starts.

- 3 Personalize the menus. See the session help.

Personalize the fields in an overview session

In LN, you can only personalize the fields in an overview session if the **Application Personalization** check box in your user data template properties on the LN server (User Data Template (ttams1110m000) session) is selected.

To personalize the fields in an overview session:

- 1 On the session's menu bar, click this button:



- 2 Select **Personalize Form ...**.

The Personalize Grid (ttadv9210m100) session starts.

- 3 Personalize the columns in the grid and any view fields above the grid.

You can perform various actions, such as:

- Format view fields (Bold, Italic, etc.).
- Change the label texts of view fields.
- Hide or unhide view fields and columns in the grid.
- Change the order of columns in the grid.
- For enumerated (list box) values in the grid, select whether you want to view the descriptions or the corresponding icons.

See the online help of the Personalize Grid session.

- 4 Save the changes and close the Personalize Grid (ttadv9210m100) session.

Hide fields on the fly in details sessions (for LN back-ends with Enterprise Server 8.7.1 or higher)

To hide a field in a details session, right-click the field and select **Hide field**. If you try to hide a mandatory field, you are prompted for confirmation.

To restore hidden fields:

- 1 On the session's menu bar, click this button:



- 2 Select **Personalize Form**

The Personalize Grid (ttadv9210m100) session starts.

- 3 Restore the hidden fields. See the session help.

Move grid columns on the fly

To change the sequence of the columns in a grid, you can drag columns to another location in the grid.

Miscellaneous actions

Right-click a column header in an overview session to display a shortcut menu with these options:

Personalize Columns	Personalize the fields in the overview session.
Freeze this Column	Select this option to freeze the selected column. This is especially useful in wide screens. The frozen columns are always visible, even if you scroll horizontally to the other side of the session window.
Easy Filtering	Select this option to switch Easy Filtering on or off. See "Easy Filtering" on page 41. You do not need any authorization to use this option.
Instant Filtering	Select this option to switch Instant Filtering on or off. See "Instant Filtering" on page 42.
Match Case	Select this option to make the filter case sensitive. See "Match Case" on page 42.
Field Help	Select this option to display the online help of the column.

Export and import personalizations (for LN back-ends with Enterprise Server 8.7.1 or higher)

You can export your personalizations to an XML file on your computer. You can import this file into another LN environment. In this way you can copy your personalizations from one environment to another.

To copy personalizations to another environment:

- 1 Start the Session Personalization (ttadv9403m000) session.

- 2 Export the personalizations to an XML file.
See the session help.
- 3 Sign on to the other LN environment and start the Import Personalizations (ttadv9503m000) session.
- 4 Import the XML file.
See the session help.

Sensitivity labels support

Web UI supports the use of sensitivity labels.

These labels are used to indicate the sensitivity level of data.

Each sensitivity level has its own label. See the following example:

Sensitivity level	Sensitivity label
10	Normal
20	Medium
30	High
40	Very High

Each sensitivity label has its own color.

In LN Tools, sensitivity levels can be assigned to:

- Table fields
- Tables
- Sessions
- Reports

For more information, see "Sensitivity labeling" in the Enterprise Server online help.

Web UI can display sensitivity labels on forms. This figure shows an example:

Recently Closed Sensitivity Level of Table fields ×

Medium

All Companies

Company:

◀ ▶

Table	All Fields	Table Field	Sensitivity Level	Sensitivity Label
<input type="checkbox"/> tdsIs400	<input type="checkbox"/>	refa	30	Very High
<input type="checkbox"/> tewhr009	<input checked="" type="checkbox"/>		10	Medium
<input type="checkbox"/> tewhr503	<input type="checkbox"/>	doub	10	Medium
<input type="checkbox"/> tewhr503	<input type="checkbox"/>	floa	20	High
<input type="checkbox"/> tlbct350	<input checked="" type="checkbox"/>		30	Very High

Conditional Formatting

Web UI supports conditional formatting of data. You can define conditions to apply special formatting effects to the data displayed in LN sessions. You can define multiple conditions per session.

You can specify, and combine, the following types of formatting:

- A foreground color for a particular field.
- A background color for a particular field.
- A background color for an entire row (record).
- A warning symbol for a row.

You can define various types of conditions, both simple and more complicated. For example:


- In the Production Orders (tisfc0501m000) session, all production orders with Order Status "Released" must be displayed on a green background.
- In the Sales Contracts (tdsIs3500m000) session, the Contract Date of all sales contracts older than one year must be displayed in red.
- In the Sales Order Lines (tdsIs4101m000) session, a warning symbol must be displayed for all sales order lines with an Amount greater than the Required Ordered Quantity.
- In the Production Orders (tisfc0501m000) session, a warning symbol must be displayed and the Planned Delivery Date must be displayed in red, for all orders that are 1 to 5 days late.
- In the Sales Orders (tdsIs4100m000) session, a warning symbol must be displayed and the order Amount must be displayed on a blue background, for all sales orders with an order amount greater than 1000.

Note:

- Conditional formatting is only supported in LN.
- You can only define formats if the **Application Personalization** check box in your user data template properties on the LN server (User Data Template (ttams1110m000) session) is selected.

Defining conditional formatting

To define conditional formatting:

- 1 Start the session for which you want to define the formatting.
- 2 On the session's menu bar, click this button:

- 3 Select **Conditional Formatting** and subsequently select **Edit Conditions**. The Conditional Formatting (ttadv9502m000) session starts.
- 4 Insert the conditions and the formatting settings.
For details, refer to the online help of the Conditional Formatting (ttadv9502m000) session.
- 5 Save the changes and close the Conditional Formatting (ttadv9502m000) session.
- 6 Restart the session you defined the formatting for. The new format is activated automatically.


Points of attention:

- The conditional formatting that you define in the procedure mentioned applies only to your own user account.
- Super users can create System formats that apply all users. To create these formats, a super user must start the Conditional Formatting (ttadv9502m000) session directly, for example from the LN **Tools** menu or through the **Run Program** command in the Web UI **Options** menu.
- Super users can export formats to an XML file and import formats from an XML file. In this way a super user can distribute formats to multiple LN environments. For details refer to the online help of the Conditional Formatting (ttadv9502m000) session.
- When you hover the mouse pointer over a conditionally formatted row or field, the description of the corresponding condition is displayed as a tooltip.

Disabling conditional formats

The conditional formats you defined for a session are activated automatically, each time you start the session.

To disable a conditional format:

- 1 On the session's menu bar, click this button:

- 2 Select **Conditional Formatting**. The formats defined for the session are displayed.
- 3 To disable a format, clear the corresponding check box.

Note:

The format is disabled only temporarily. The next time you start the session, the format is automatically activated again.

To make sure that a format is disabled each time you start a session, you must modify the format's properties:

- 1 On the session's menu bar, click this button:



- 2 Select **Conditional Formatting** and subsequently select **Edit Conditions**. The Conditional Formatting (ttadv9502m000) overview session starts.
- 3 Edit the format you want to disable. The Conditional Formatting (ttadv9502m000) details session starts. Clear the **Enabled** check box.

Copy a range of records to another application

In multi-occurrence sessions, you can copy a range of records to another application, such as MS Excel.

Complete these steps:

- 1 On the session's **Actions** menu, select **Copy to Clipboard**.
A message is displayed in the status bar.
- 2 Browse to the first record you want to copy and select this record.
A message is displayed in the status bar.
- 3 Browse to the last record you want to copy and select this record.
- 4 Start the other application. For example, start MS Excel.
- 5 Paste the records from the clipboard. For example, press Ctrl + V.

MS Excel integration

In LN sessions that show data directly from a table, you can export data to, and import data from, MS Excel. After starting such a session, you can select the tabs and columns you want to export. Then you can perform a quick export or an advanced export.

During the export, a .xlsx workbook is generated. To open this workbook you need one of the following:

- Microsoft Excel 2007 or later
- Microsoft Excel 2003 with a Microsoft Office compatibility pack

After exporting data from a session, you can edit the Excel export workbook and import the workbook back into the same session. Only cells with edit permissions are imported.

Excel button and menu

In each session where you can export data to Excel, the session's toolbar contains an **Excel** button with a menu. The menu contains these commands:

- **Quick Export:** Directly exports the selected data using default settings.
- **Advanced Export:** Starts a session where you can specify settings for the export.
- **Fields to Export:** Starts a session where you can select the fields to be exported.
- **Settings:** Starts a session where you can specify general export and import settings for all sessions.
- **Import:** Starts a session where you can specify settings for the import.

You can use the **Excel** button to perform an export based on the default export mechanism that is specified in your general export settings.

Export procedure

Before you can start your first export, you must specify general settings for the export process. These settings apply to all sessions for which no session-specific settings are defined. See "Specifying general settings" on page 52.

For details on how to export data from a session, see "Exporting data to MS Excel" on page 53.

Import procedure

Before you can start your first import, you must specify general settings for the import process. These settings apply to all sessions for which no session-specific settings are defined. See "Specifying general settings" on page 52.

For details on how to import data into a session, see "Importing data from MS Excel" on page 54.

Specifying general settings

The general settings apply to all sessions for which no session-specific settings are defined. Specifying these settings usually is a once-only action.

To specify the general settings:

- 1 Start a session where you can export data to Excel. For example, start the Sales Orders (tdsls4100m000) session.
- 2 Complete one of these steps:
 - If the session runs in Infor Ming.le, in the toolbar, click the arrow next to the **Excel** button. Then select **Settings**.
 - If the session runs in classic Web UI, select **Edit > Export > Settings**.

The Excel Integration Settings (ttstpssidef) session starts.

- 3 Specify the default export and import settings. See the session help. The import settings are only relevant for Infor Ming.le users.

- 4 Save the settings and close the Excel Integration Settings (ttstpssidef) session.

Exporting data to MS Excel

This section describes these export mechanisms:

- Quick export
- Advanced export

Executing a quick export

To perform a quick export:

- 1 Start the session from which you want to export data.
- 2 Start the export.

Complete one of these steps:

- If the session runs in Infor Ming.le, in the toolbar, click the arrow next to the **Excel** button. Then select **Quick Export**.
- If the session runs in classic Web UI, select **Edit > Export > Quick Export**.

The export starts.

The export process uses the export defaults of the session concerned, or the general export settings:

- If these conditions are met, the export is based on the session's export defaults:
 - You saved export defaults for the session. See "Executing an advanced export" on page 53.
 - The **Use session defaults for quick export if present** check box in the Excel Integration Settings (ttstpssidef) session is selected.
- In all other situations, the export is based on the general settings specified in the Excel Integration Settings (ttstpssidef) session.

Executing an advanced export

To perform an advanced export:

- 1 Start the session from which you want to export data.
- 2 Optionally, select the fields to be exported.
 - a Complete one of these steps:

- If the session runs in Infor Ming.le, in the toolbar, click the arrow next to the **Excel** button. Then select **Fields to Export**.
- If the session runs in classic Web UI, select **Edit > Export > Fields to Export**.

The Fields to Export (ttadv9310m100) session starts.

- b Select the fields and/or tabs you want to export. See the session help.
- c Save your selection and close the Fields to Export (ttadv9310m100) session.
- d Restart the session from which you want to export data.

3 Start the export

To export the selected data:

a Complete one of these steps:

- If the session runs in Infor Ming.le, in the toolbar, click the arrow next to the **Excel** button. Then select **Advanced Export**.
- If the session runs in classic Web UI, select **Edit > Export > Advanced Export**.

The Advanced Export (ttstpssiexp) session starts.

b Specify the export settings. You can specify for example:

- The location where the spreadsheet file will be generated.
- Whether the file must be opened automatically after generation.

See the session help.

c Optionally, click **Save Defaults** to save the settings as default export settings for the session concerned. If you selected the **Use session defaults for quick export if present** check box in the Excel Integration Settings (ttstpssidef) session, the saved default settings are used during a next Quick Export.

d Click **Continue**.

The export starts based on the specified settings.

Importing data from MS Excel

To import data:

- 1 In Infor Ming.le, start the session into which you want to import data.
- 2 In the toolbar, click the arrow next to the **Excel** button. Then select **Import**. The Import (ttstpssiimp) session starts.
- 3 Specify the required settings and click **Import**. See the session help.
In the import dialog, you must specify the location of the Excel file. You can copy this location from the **File** tab in Excel.

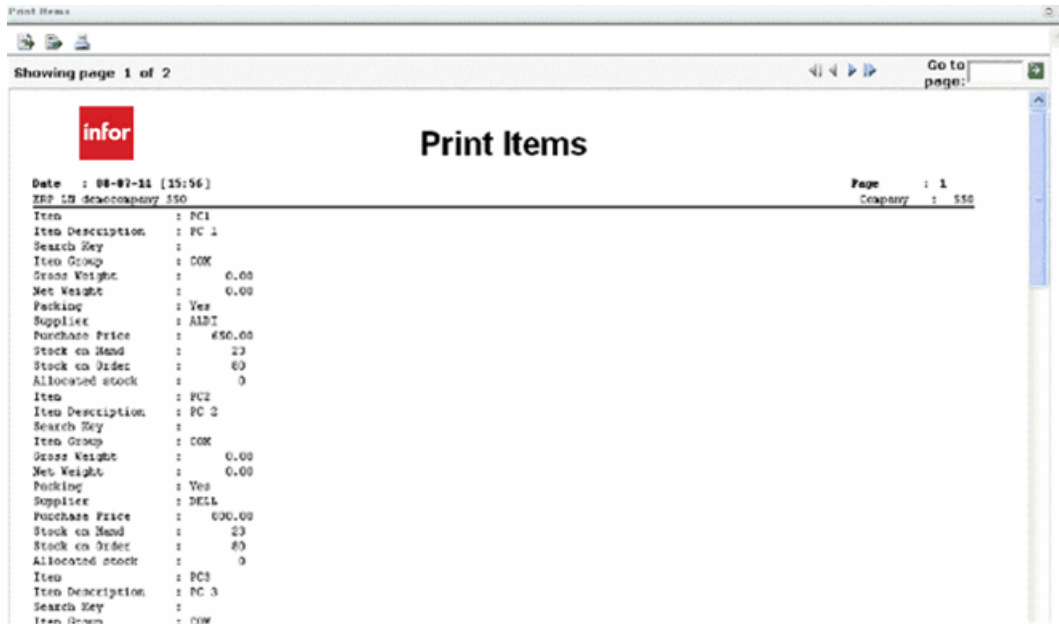
Verifying the result of an import

The result of an import is stored in columns A through C in the Excel import file. To verify the result of the import, view the content of these columns.

Column A contains the error condition. Column B and C contain the detailed import error. If there is no error, column A contains "OK", and column B and C are empty.

Using the Report Viewer

The Report Viewer is used to display session-based and query-based reports.





In the Report Viewer you can perform these actions:







- Navigate through the report data.
- Export report data.
- Print the report.

See the descriptions of the toolbar buttons.

Toolbar buttons

The following toolbar buttons are available.

Button	Description
 Export data	Starts the Export Data dialog, where you can select report columns and meta data, such as layout names and data types, to be exported. The data is exported in csv (Comma Separated Values) format. You can store the data in a file or view it directly, for example in MS Excel.
 Export report	Starts the Export Report dialog, where you can select the following: <ul style="list-style-type: none"> • The output format: Excel, PostScript, PDF, Word, or PowerPoint. • The pages to export. • The report size.

Button	Description
	You can store the data in a file or view it directly.
 Print report	Starts the Print Report dialog, where you can select the following: <ul style="list-style-type: none"> • The output format: HTML or PDF. • The report size (only for PDF). • The pages to export. The output is displayed in a print preview window. If you selected HTML, you are automatically prompted to select a printer. If you selected PDF, click Print to print the output.
 First page	Navigates to the first page.
 Previous page	Navigates to the previous page.
 Next page	Navigates to the next page.
 Last page	Navigates to the last page.
 Go to	Navigates to the page specified in the Go to page field.

Customer defined fields

Introduction

In LN you can add extra table fields, which are shown and can be edited on session forms, without creating customizations. In this way you can store additional information in LN tables. These extra fields are called Customer Defined Fields (CDF).


Prerequisites

To add customer defined fields, you must be authorized for the Customer Defined Fields (ttadv4591m000) session.

In addition, CDF must be enabled for the LN environment. To achieve this, the customer defined fields parameter must be set. For details, see "Customer defined fields" in the *Infor Enterprise Server Administration Guide (U8854)*.

Adding customer defined fields

To add customer defined fields to a table, complete the following steps:

- 1 Start the session that uses the involved table as its main table. For example:
 - To add customer defined fields to the Employees - General (tccom001) table, start the Employees - General (tccom0101m000) session.
 - To add customer defined fields to the Sales Orders (tdsls400) table, start the Sales Orders (tdsls4100m000) session.
- 2 On the session's menu bar, click this button:

- 3 Select **Customer Defined Fields**. The Customer Defined Fields (ttadv4591m000) session starts.
- 4 Add the desired customer defined fields. For details, refer to the online help of the Customer Defined Fields (ttadv4591m000) session.

Session personalization

From Enterprise Server 10.4, a session can contain two types of customer defined fields:

- 1 Customer defined fields of the main table. These are regular customer defined fields. If set to active, these fields are initially visible in the session. See the online help of the Customer Defined Fields (ttadv4591m000) session.
- 2 Referenced customer defined fields. These are active customer defined fields that belong to a table that is referenced by the main table of the session. Referenced customer defined fields are initially invisible in the session.

A referenced customer defined field is linked to a session if its table is referenced through:

- A table definition (so-called hard-reference)
- A reference specified in the form definition, in particular in the **Input/Ref Express** property of a form field
- A `query.extend.select()` call in the UI script of the session

If a session contains customer defined fields, you can perform these actions:

- Hide/unhide these fields.
- Move these fields to a different location, such as a different tab.

See "Personalizing sessions" on page 44.

Viewing session properties

- 1 Start the session.
- 2 Press Ctrl+Shift+8.

The Properties (tttdsksession) session starts. This session displays the following information:

- Session information, session data, authorizations, and form information.
- Object information.
- Environment (Developer and Bshell) information.
- 4GL engine information.
- Query data.
- Your user data.

Highlighting columns in a session

You can highlight columns in LN sessions. In this way you can draw attention to a particular column.

This can be useful, for example:

- When you give a presentation.
- When you create screenshots.

To highlight a column, click the column header. To remove the highlighting, click the column header again.

To highlight multiple columns, press Ctrl and click the corresponding column headers.

Resizing columns in a grid

To change the width of a column:

- 1 Place the mouse pointer on the column separator in the grid header. The pointer changes to a double-headed arrow.
- 2 Click, and drag the double-headed arrow to the right or to the left.

To change the column width to automatically fit the contents, double-click the column separator in the grid header.

Showing display-only fields

To locate empty display-only fields in a session, right-click on any location in the session. A dashed box is displayed around each display-only field.

To restore the original appearance of the fields, press any key.

Pictures

Adding pictures

Some LN sessions, such as the Contact (tccom1640m000) session, contain a picture box where you can add pictures.

You can add a picture as follows:

- Drag a picture from a Web browser or Windows explorer window, and drop it on the session's picture box.
- Copy a picture in a Web browser or Windows explorer window, and paste it on the session's picture box.
- Hover the mouse pointer over a picture box. A browse button is displayed. Click this button to browse to a folder and select a picture.

For details, see the online help of the involved sessions.

When you add a picture in a session, the picture is stored in an image repository on the LN server.

Large images are scaled automatically, so they fit in the session's picture box. When you add a small picture, you are asked whether you want to display the picture larger.

Removing pictures

To remove a picture, right-click the picture in the session's picture box and select **Delete**. The picture is removed from both, the session and the image repository.

ION Workflow Support

Some sessions are enabled for ION workflow. You can use these sessions to make changes to a Business Object. These changes must be submitted for approval. Only when these changes are approved, the Business Object may be processed further.

For more information, see "Document Authorization" in the *Infor Enterprise Server Administration Guide (U8854)*.

This table shows the additional commands that are available in sessions that are enabled for ION Workflow:

Command	Description
Submit	Submits the selected object for approval. This command is available as a button in the session's toolbar.
Recall	Makes a request to ignore any submitted changes for the object. Use this command, for example, if you want to make more changes to an object you already submitted. This command is available in the session's Actions menu.
Revert to approved	Makes all changes to the object undone. This command is available in the Save button's pull-down menu.

Quick Flow

Various features in LN sessions are enabled for Quick Flow. You can use Quick Flow to optimize a specific process by suppressing process steps.

For example, to optimize print processes or process actions in a session's menu or toolbar, you can suppress these components:

- Device selection dialogs for reports
- Option dialogs for menu actions
- Question dialogs
- Message dialogs


Administrators can publish personalized sessions and dialogs to other users.

Optimizing a process through Quick Flow

To enable Quick Flow for a menu option in a session:

- 1 Verify whether the option is enabled for Quick Flow. Complete these steps:
 - a Start the session concerned.
 - b Open the menu that contains the menu option.
 - c Move the mouse pointer over the menu option. If the option is enabled for Quick Flow, a grey flash (lightning) icon is displayed behind the menu option. This means that no default settings are saved yet. The dialog that belongs to the selected option will not be suppressed.


If the menu option is enabled for Quick Flow, proceed with the next step.

- 2 Save defaults for the menu option. Complete these steps:
 - a Select the menu option. The corresponding dialog is displayed.
 - b Specify your default settings in the dialog.
 - c Click the  button in the dialog and select **Save Defaults**.
 - d Close the dialog.
- 3 Move the mouse pointer over the menu option again and click the flash icon. The color of the icon changes to black. Quick flow is now active for the menu option.
- 4 Test the result. Complete these steps:
 - a Select one or more records in the session's grid.
 - b Select the menu option for which you activated Quick Flow. The corresponding settings dialog is skipped.

Example

The **Print** menu in the Adjustment Orders (whinh5120m000) session contains the **Adjustment Orders** option. When you select this option, the Print Adjustment Orders (whinh5420m000) session starts. This session has multiple tabs, where you must select a device and specify selection ranges and various options for the report. You want to use Quick Flow to skip these tabs, so that the report is printed directly.

To suppress the tabs of the Print Adjustment Orders (whinh5420m000) session, you complete these steps:

- 1 Start the Adjustment Orders (whinh5120m000) session.
- 2 Move the mouse pointer over the **Adjustment Orders** option in the session's **Print** menu. A grey flash (lightning) icon is displayed. This indicates that the menu option is enabled for Quick Flow.
- 3 Select the **Adjustment Orders** option in the **Print** menu. The Print Adjustment Orders (whinh5420m000) session starts. In this session, complete these steps:
 - a In the session's tabs, specify your default settings, such as a device, selection ranges, and other options.
 - b Click this button:

 - c Select **Save Defaults**.
- 4 Move the mouse pointer over the **Adjustment Orders** option again and click the flash icon. The color of the icon changes to black. Quick flow is now active for the **Adjustment Orders** option.
- 5 Return to the Adjustment Orders (whinh5120m000) session. Select one or more records in the session's grid and, on the **Print** menu, select **Adjustment Orders**. The Adjustment Orders report is printed directly.

Suppressing messages and questions

During print processes and process actions, messages and questions can be displayed.

Depending on LN settings, you can suppress messages of type “Information”, and questions. Messages of type “Critical” and “Warning” cannot be suppressed.

To suppress a message, in the message dialog, select **Do not show this message again** and click **OK**.

To suppress a question, in the question dialog, select **Do not show this question again** and click the desired answer button.

Note: You can only suppress messages and questions if the LN application administrator has enabled the suppression of messages and questions in LN.

Undoing the suppression of messages and questions

To undo the suppression of messages:

- 1 Click this button:



- 2 Select **Reset Messages**.

To undo the suppression of questions:

- 1 Click this button:



- 2 Select **Reset Questions**.

The Reset Questions (ttadv9102m000) session starts. See the session help.

Setting a default print action

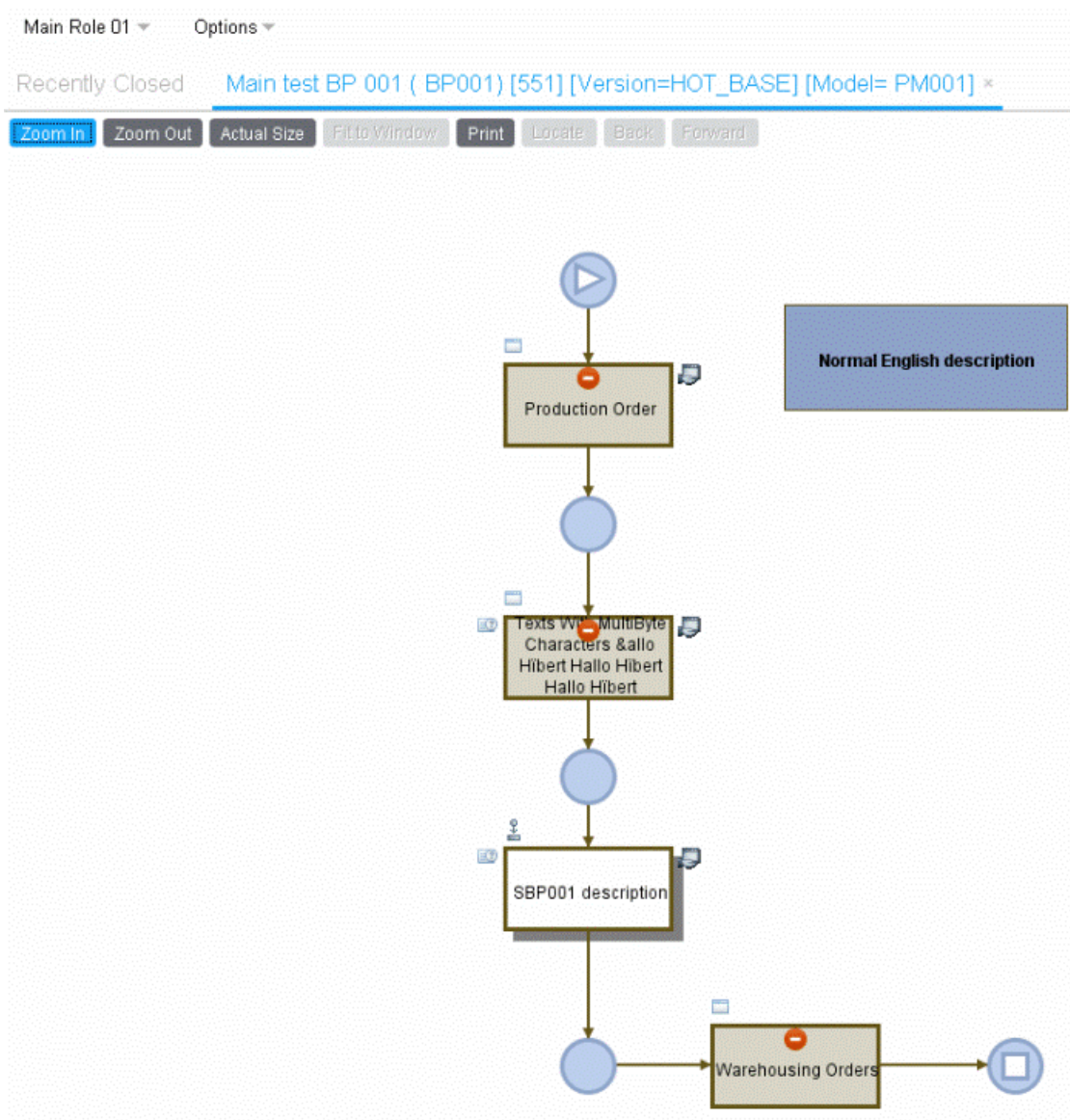
For some menus in a session, you can set a default action. For example, the **Print** button menu can have multiple actions. You can set one of the actions as default. If you click the **Print** button, this default action is executed. See "Personalize menus" on page 45.

Starting a process

You can start LNDEM processes through the application navigation menu bar in the Infor Ming.le-LN Plug-in. When you start a process, a graphical representation of the business process is displayed in the application area.

If you work from the graphical representation in the application area, the images are interactive. Some represent a process, while others represent LN sessions or other modeled applications. The graphical representation of a process enables you to carry out your daily work.

This figure shows a sample process in the application area:



Using DEM processes

DEM provides you with process-based navigation through the LN application. While application-based navigation logically bundles applications into folders, modules, and packages, process-based navigation bundles these applications according to your task. As a result, rather than centralizing the application itself, the task a user must perform is centralized. A diagram shows activities in a specific order. For each task, you can create a separate Business Process. Activities can be LN sessions, *URLs*, manual activities, and/or Microsoft Office applications.

If you work with DEM, you are dependent on the *authorization* settings created by your *system administrator*. Your work diagram can appear entirely different from your colleague's.

Note:

A DEM activity can start an application on your client PC, for example MS Word. However, this only works if your PC has an MS Windows operating system.

Starting a DEM process

Through the application navigation menu bar, you can start DEM processes that your modeler developed. You can work from the graphical representation in the application area. If you click a symbol, the activity opens and you can perform your task. Some figures represent processes, whereas others represent a part of a process.

Click a process to view an overview of the sequential order and the number of tasks that you must complete to perform your job.

Switching between multiple processes

If you start multiple DEM processes, only the last process is displayed in the application area. The other processes are still open. For each open process, a tab is displayed below the application navigation menu bar. To switch to another open process, click the corresponding tab.

Instead of using the tabs, you can use keyboard shortcuts.

Switching between sessions or DEM processes

This table shows the keyboard shortcuts to switch between running sessions or DEM processes:

Action	Shortcut	Note
Display a list of open sessions or DEM processes	Ctrl+Tab	You must hold the Ctrl key. If the current focus is inside a tab in a session, the list also displays the available tabs. To switch to another session or tab, select the corresponding item from the list. To close the list, release the Ctrl key.
Next session Next tab Next DEM process	Ctrl+Tab	You must immediately release the keys.
Previous session Previous tab	Ctrl+Shift+Tab	You must immediately release the keys.

Action	Shortcut	Note
Previous DEM process		
Next session	Ctrl+Alt+Tab	This shortcut does not work in Windows 7.
Previous session	Ctrl+Alt+Shift+Tab	This shortcut does not work in Windows 7.

Glossary

access key

The underlined letter in a menu name or command name that offers keyboard access.

actual size

The original process size. If you lose the original picture due to zooming, actual size returns the picture to its initial size.

administrator

An individual responsible for maintaining a multi-user computer system, including networks such as LAN, WAN, and Internet.

Typical duties include:

- Adding and configuring new workstations.
- Setting up user accounts and enabling central deployment and user profiles.
- Installing system-wide software and Web UI for clients.
- Performing procedures to prevent the spread of viruses.
- Allocating mass storage space.

The system administrator is sometimes called the sysadmin or the systems administrator. Small organizations might have one system administrator, while larger enterprises usually have an entire team of system administrators.

application

A program or group of programs designed for end users. Software can be divided into two general classes: systems software and applications software. Systems software consists of low-level programs that interact with the computer at a basic level. This includes operating systems, compilers, and utilities for managing a computer resource. In contrast, applications software, which is also known as end-user programs, includes database programs, word processors, and spreadsheets. Applications software runs over systems software, because it cannot run without the operating system and system utilities.

application-based navigation

The application is the point of departure for application-based navigation. The Infor LN or Baan application is developed to cover the complete enterprise resource planning field. Users can perform their tasks in this application, according to specific ERP logistics. No room is available for personal interpretation.

area

Part of the Web UI window. Web UI is divided into various areas: the **Shortcuts** panel, the navigation panels, the Work Area, and the Title Bar.

authorization

The process of granting or denying access to a network resource. Most computer security systems are based on a two-step process. The first step is authentication, which ensures that users are who they claim to be. The second step is authorization, which grants access to various resources based on the user's identity.

back command

Refers to a browser functionality in which you can click **Back** to start up several Web sites and return to a former Web site. In Web UI, this functionality is not available. For best results, do not to use the **back** button because you risk losing Web UI, which requires you to log on again.

back end

In client/server applications, the client part of the program is often called the front end, and the server part is called the back end. In Web UI, the back end is the Infor LN or Baan application, the Infor LN Business Adapter application, and/or Infor Web Help, the online Help application.

browse list

A *modal* or secondary window that starts if the user browses on an input field in the Details window or Overview window to retrieve a value for that input field. The browse list displays a list of objects or properties of objects. Only those objects or properties of objects are displayed that are valid within the context of the related input field or browse filter.

browser

Short for Web browser, a software application used to locate and display Web pages. The most popular browsers are Netscape Navigator, FireFox and Microsoft Internet Explorer, which are graphical browsers that display both graphics and text.

button

In graphical user interfaces, a button is a small outlined area in a dialog box that you can click to select an option or command.

BW

Thick client software to connect to the Infor LN or Baan application; Windows UI solution.

central modeling company

The company where all DEM models are stored. If you **Change Company** to a company with a different central modeling company, you get an error.

check box

A standard Windows control that displays a setting, either selected (checked) or cleared (unchecked).

collapse and expand

To expand is to show the lower level. To collapse is to hide the lower level.

combined window

A combined window presents two different views: a group by and a list, all in one window. Used for displaying two views of one object. The top level of the window is the Group By part. Details of the group may be present. The lower level of the window offers a list.

command

An instruction to a computer or device to perform a specific task. Commands come in various forms, such as special words or keywords that a program understands, function keys, choices on a menu, buttons, or other graphical objects on your screen.

command button

A control that starts an action when clicked. This button contains a label that describes the action.

 Print X Cancel Save Defaults Get Defaults Add to Job Help

company

A financial or logistic division of classification that identifies the data that is stored in a database. Each company is a different record in Infor LN or Baan to work in.

DEM

Dynamic Enterprise Modeling; Web UI user meaning: a process-oriented user interface.

diagram

Graphical representation of a task.

DMB

The Dynamic Menu Browser, DMB, is the dynamic version of the Infor LN or Baan Menu Browser. The content of the

DMB is based on the modeling of Business Processes in the DEM repository and a project model modeled with DEM.

environment

Web UI is the front end for many Infor LN or Baan back-end applications. If you select or create an environment, you specify to which or how many back-end systems you want to connect with your user name and password.

ERP Menu Browser

A primary display window that presents the user-interface objects in a hierarchical way to the user, such as a tree control or menu structure.

filters

A pattern through which data is passed. Only data that matches the pattern is permitted to pass through the filter.

focus

State of a Graphical User Interface, GUI, element that handles keyboard input, for example the cursor.

grid

The table of objects/items in an overview window, combined window, or browse list. In the rows, the fields of one object are displayed. The grid can be Editable or Display.

icon

A small picture that represents an object or program. Icons are useful in applications that use windows because they make functionality easily accessible. Icons are a principal feature of graphical user interfaces.

Infor ES Web UI

See *Infor Web User Interface*.

Infor ES Web User Interface

The web based client user interface for various Infor applications, such as Infor LN, Infor Baan 5.x, Infor Baan IV, Infor DEM, Infor Workflow, and Infor Web Help.

Infor LN or Baan

The Infor LN or Baan application, the version can be Infor Baan IV, Infor Baan 5.x or Infor LN.

keyboard

Computer keyboards are similar to electric typewriter keyboards, but with additional specialized keys.

keyboard shortcut

A special key combination that causes a specific command to be executed. Typically, keyboard shortcuts combine the

CTRL or ALT keys with some other keys. In Windows environments, for example, you can use CTRL+C as a keyboard shortcut to copy. On computers, the function keys are also used as keyboard shortcuts. F1, for example, is used to call Help.

locate

The command button that returns you to the original location of the activity. When you work on a process, you might forget where you are in the process. The locate function shows the activity's location in the tree.

modal window

A modal secondary session requires the user to complete interaction within the secondary window and to close the window before continuing with any further interaction of the parent window.

modeless window

A modeless secondary window enables the user to interact with the secondary window or the primary window, just as the user can switch between primary windows.

online Help

You can get Help while using a program or session. The function key F1 is normally used as a Help key.

option button

A choice you can make, which is neither a command nor a directive.

overview session

A session that lists the available elements or records of one type and a number of the relevant fields.

package

A set of related sessions.

password

A secret series of characters that enables a user to access a file, computer, or program. On multi-user systems, users must enter their password before the computer responds to commands. The password helps ensure that unauthorized users do not access the computer. In addition, data files and programs may require a password. Ideally, the password must be an alphanumeric string of characters that no one else can guess. This code enables users to log onto the Web UI and Infor LN or Baan applications.

personalize

The ability of Web UI functionality to be adjusted to customers' wishes.

pop-up menu

A menu that appears temporarily if you click on a selection. After you make a selection from a pop-up, or more accurately a shortcut menu, the menu usually disappears. You can right-click on the **Shortcuts** panel, in the navigation panels, or in the Work Area to open the shortcut menu.

process

In Web UI, a process is a range of activities that you must perform to complete a task.

process model

A collection of Business Processes.

Process Viewer

The middle part of your screen that graphically displays the process you have activated. From this part of the screen, you can carry out your tasks.

Progress Indicator

A control that displays the percentage of a particular process that has been completed, such as printing or setting up a program. In Web UI, this progress indicator is indeterminate. In the Web UI Title Bar an undulating motion indicates that a process is being executed.

Remember Password

Web UI saves your entered password of the login dialog. The password is stored in an encrypted format on your local machine. The next time you logs on to Web UI, the password field in the login dialog is pre-filled with your saved password.

role-based navigation

To create a clear overview and bounded working environment for a role, role-based navigation contains only the information relevant to a specific task.

scroll bar

A bar that appears on the side or bottom of a window. This bar contains a slide bar, which you can move with your mouse to view other portions of the window.



session

An elementary part of the Infor LN or Baan application that the user can start to complete an activity.

shortcut

A special type of file that points to another file or device. You can place shortcuts on the **Shortcuts** panel to conveniently access files that may be stored deep in the directory structure. Clicking the shortcut icon is the same as double-clicking the actual file. You can give the shortcut any name you choose.

Static Menu Browser

The representation of the complete Infor LN or Baan application. The SMB is built in a general acknowledged range of subjects that are addressed in an ERP application.

system

Computer system. In a Web UI environment the term system is usually used for Infor LN or Baan system.

tab

Tabs enable programmers to present a batch of information that is too large for a single screen. The information of a record is distributed across several tabs, each of which includes a unique label with a name to describe the tab's contents. To display the information, the user must click the relevant tab.

taskbar

The Taskbar is the area normally at the bottom of your Desktop where all open tasks or windows are displayed as buttons. Web UI has its own taskbar at the bottom of the Work Area.

template

In Web UI, a template is a blank form that lists the fields, the fields' location, and the fields' length. A template includes all of the options available, but with no data yet entered. If you start Web UI, a copy of this template with which you can work is made available. In Microsoft Word, for example, you must open a new document or template potentially to be able to work with Word.

template list

A list of templates from which a workflow participant can create processes.

thinDEM application

The Web-enabled version of the Infor DEM application. See also *DEM*.

ToolTip

Small window that displays the name of a button or other control if the button contains no text or insufficient text. The ToolTip appears when you hover your cursor over a GUI element.

URL

Acronym for Uniform Resource Locator. An address for a resource on the Internet. Web browsers use URLs to locate Internet resources. A URL specifies the protocol to be used in accessing the resource, such as http for a World Wide Web page, or ftp for an FTP site; the name of the server on which the resource resides, such as <http://www.infor.com/>; and, optionally, the path to a resource, such as an HTML document or a file on that server.

user authorization

The system administrator who is entitled to set certain limits to user authorization in the User Data session. You can obtain further information from the Installation Guide that is distributed with the Web UI media.

user defined attribute (UDA)

A workflow variable that a user can define when modeling the template.

user interface

The junction between a user and a computer program. An interface is a set of commands or menus through which a user communicates with a program. The user interface is one of the most important parts of any program because it determines how easily you can make the program perform. A powerful program with a poorly designed user interface has little value. Graphical user interfaces, such as Web UI, that use windows, icons, and pop-up menus have become standard on personal computers.

user name

A name assigned by the systems administrator that identifies a user. A user name can be authorized to create user profiles. If a user name is not authorized to create its own user profile, the system administrator is responsible for creating a template for this user.

user profile

In the Select User Profile dialog box, you can define the skin, the language, and the application with which to work.

Web address

Also known as a URL, which is short for Uniform Resource Locator, a Web address is a type of Uniform Resource Identifier, URI, the generic term for all types of names and addresses that refer to objects on the World Wide Web. A URL refers to an object by address.

Web Help

If you encounter a problem or forget a command while you run the Web UI, click F1 to display the Help topics. Infor

Web Help contains session Help, DEM Help, and Web UI Help.

Web site

A site or location on the World Wide Web. Each Web site contains a homepage, which is the first document users see when they enter the site. The site can also contain additional documents and files. Each site is owned and managed by an individual, company, or organization.

Web UI

See *Infor Web User Interface*.

Windows NT

A version of the Windows operating system. Windows NT, New Technology, is a 32-bit operating system that supports multi-tasking.

Workflow

Manages the flow of work and information in a company. By means of modeled business processes, a company's work processes are controlled.

work list

A list of activities associated with a specific workflow participant, or with a group of workflow participants who share a common work list. The work list forms part of the interface between a workflow engine, for example iflow server, and the work list handler, for example Web UI/Worktop.

Worktop

Windows-based thick client variant of Web UI.

zoom in/zoom out

Zoom in enlarges the process on your screen, while zoom out reduces the process.

zoom session

The session in which you can browse through the available records and select a record. A zoom session is an overview session in read-only mode. You can use a zoom session to select the code of an existing record, for example, an item, order type, or warehouse, in another session. Use CTRL+B on a zoom field to start a zoom session.

