Menu System User Guide

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Pathway 3.09 (Thick Client Version)

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Overview

The menu system is the first point of contact that the user has with the system.

The Menu may be viewed in one of two ways:

- Tree View (Very similar to File Manager)
- Button View (Buttons representing menu items.)

Each user may control the way the menu is presented.

The purpose of the menu system is to authenticate users and provide a means for navigating the provided functions.

The following chapters are covered in this manual:

Getting Started
Menu Set Up

Getting Started

The following topics are covered in this section:

Logging On
Setting Up Users
Changing Personal Settings

Logging On

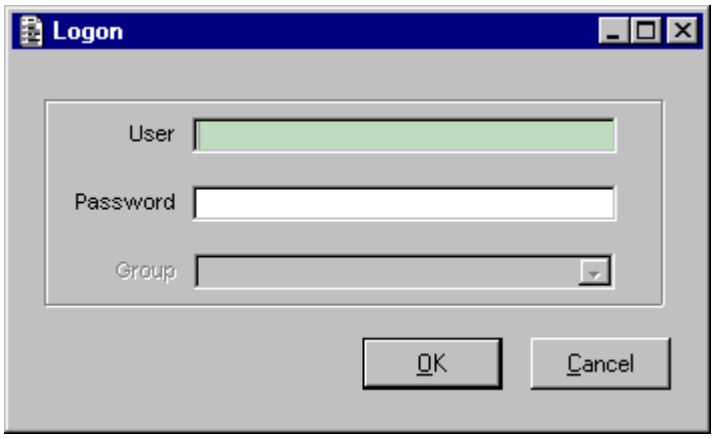
Before performing any other instructions you will first need to log on. The process of logging on involves entering the name of a user, a password and clicking OK. After a successful log on the menu form will be displayed, providing a list of available menu options.

Logon Form

This form is the first Pathway form you will see. To Logon you must enter your User Id (which your system administrator would have provided to you) and your password.

The menus you have access to are displayed in the Group field.

Your system administrator defines the number of attempts you have at logging on. This setting is usually set to about 3 attempts. After that you will be denied access and will need to contact your supervisor.



Logon Form

User
Enter your User Id in this field.
If an invalid user id is specified the system will display the message “The user or password is invalid”

Password
Enter your password in this field. As you enter your password it is represented on the form by “asterisks”. This is to preserve the security of your password.
If an invalid password is specified the system will display the message “The user or password is invalid”

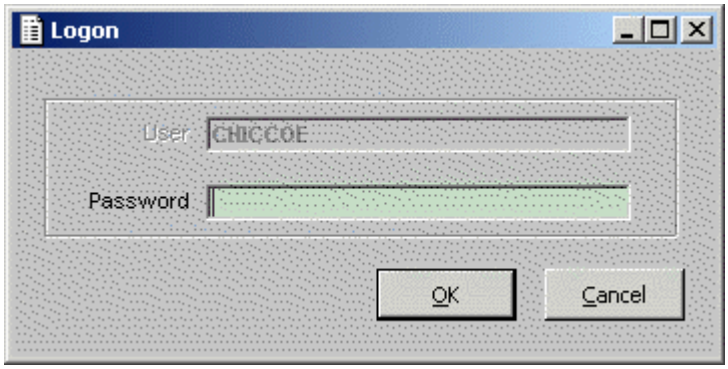
Group
This field contains the names of all the valid menus to which you are assigned. (Sometimes only one)
The menu nominated as your default will be displayed.
If you wish to logon with any other menu then press the drop down and select the appropriate menu. Once logged on the menu being displayed may be changed at any time.

Cashier Logon Form

This form will display in Receipting when the ‘Use Password Security’ parameter is checked on in Receipting system Parameters. It will display when the options Cashier Sign On, Cashier Sign Off and Receipt Entry are accessed. It requires that a password be entered in order to gain access to those options. If the

password entered does not match the password for the user currently logged into Pathway, then the option will not be accessed. If the password matches, then the option will display and the user will be able to use the functions as per standard behaviour.

Note: The password prompt will be made each time the menu option is taken. If the user does not exit back to the menu from the selected function then a password prompt will not occur, e.g. if suspended receipts existed in a drawer then the user must exit the selection form and be back at the menu for the password to take effect again.



Cashier Logon form

User
The user currently logged on to Pathway will default into this field.

Password
Enter your password in this field. As you enter your password it is represented on the form by “asterisks”. This is to preserve the security of your password.
If an invalid password is specified the system will display the message “The user or password is invalid”

Menu (Tree View)

The Tree style menu allows the user to access the entire menu in a tree structure on one form. The Tree style menu should be used in preference to the Button style because it supports new facilities such as changing the user group (menu) which the Button style menu does not cater for. At some point in the future the Button style menu will be discontinued.

Note that the menu options displayed are exactly the same whether the Tree or the Button style menu is used. The choice of style of menu is completely independent of the menu structure or menu options available to the user.

You may change to the Button style menu at any time. (See User Preferences later in this manual)

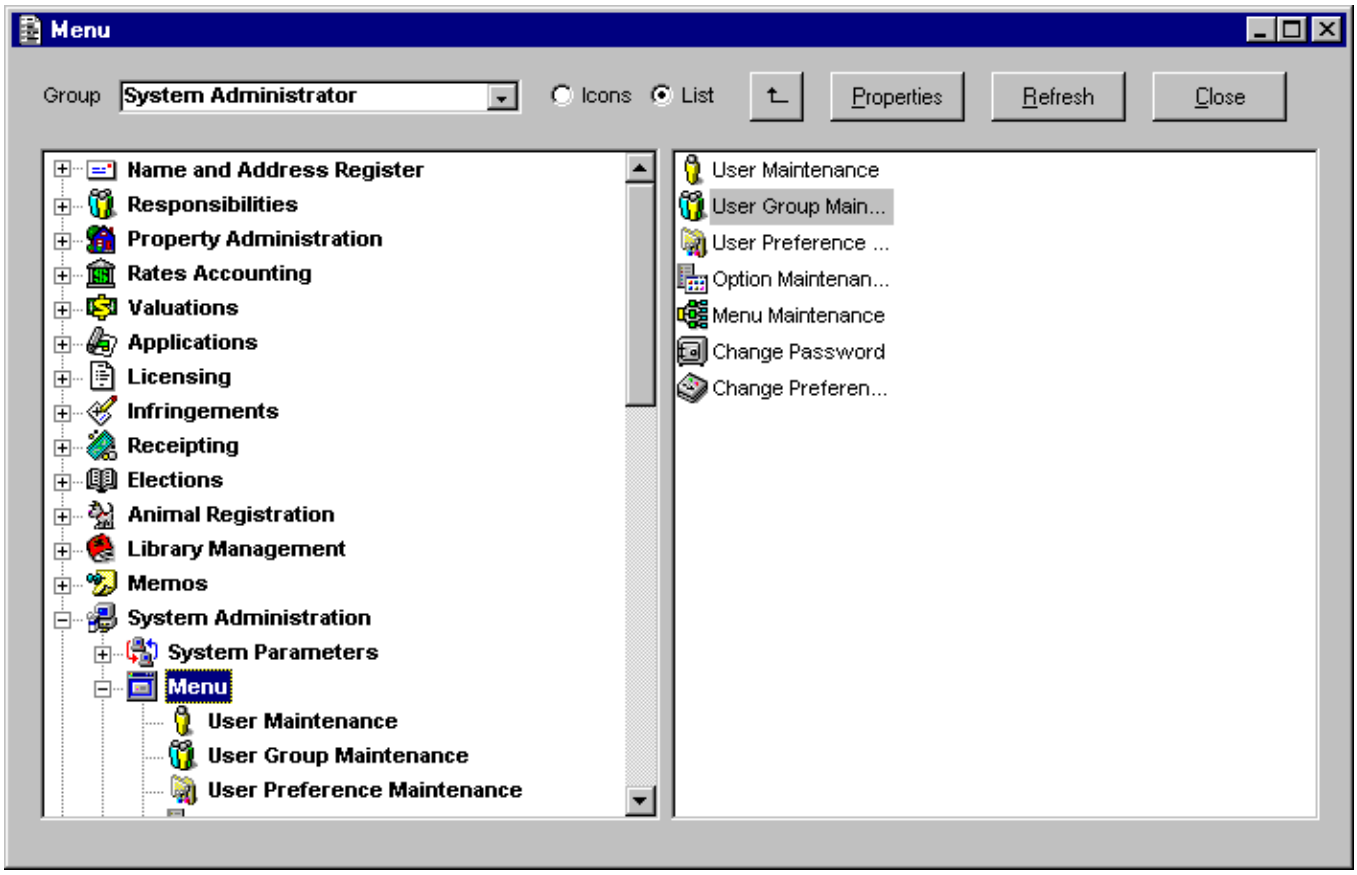
The tree style menu has some similarities with Explorer in Windows. It consists of two panels. The left-hand side panel displays a hierarchy of menu branches and menu options. This is sometimes referred to as the menu tree. The right hand side panel displays the menu options and menu branches for the menu branch that is currently highlight in the left-hand side panel.

Navigation around the menu is similar to Explorer. The Up/Down arrow keys, Tab keys or using the mouse is supported. In addition you may enter the first character of a menu item and focus will be placed on the first option that matches. For example pressing A may take you to Animal Maintenance then pressing A again may take you to Audit.

The menu hierarchy may be expanded and collapsed by clicking on the (+) and (-) symbols. Where there is no symbol the item is the lowest item in that branch.

Double clicking on text will do one of two things: -
If the text is merely a menu branch e.g. Property Administration it will expand or collapse the levels underneath it.
If the text is an Option then the Pathway form will be presented. E.g. Double click on Property Maintenance will present the Property Search Profile.

The Tree style menu can be re-sized by clicking and dragging any boundary. Clicking and dragging may also move the dividing bar between the left and right panels. Note that the size and position of the menu window will be remembered between sessions.



Menu Form

Group
The Group drop-down list allows a user that is assigned to several user groups to quickly swap between those user groups. As a different group is selected the menu displayed is automatically changed to the menu structure associated with the user group.

Only the groups to which you have access are displayed in drop-down list.

Icons/List
Pressing Icons or List determines how the options are presented in the right hand panel. This radio group is set to the user preferences when a new session is started.

The Icon/List view may be changed at any time. Changing it within a session does not change the user preferences. To change permanently you must change through User Preferences.

Up Arrow
Pressing this arrow will take you back up the menu tree. For example you may be at the third level down in a menu structure. Pressing the arrow once will take you to the second level. Pressing again will take you to the top level.

This is most useful when double-clicking on menu branches displayed in the right hand panel, where it is easy to become disorientated as to your current position in the tree. The up arrow can be used to quickly backtrack up the menu structure.

Properties
Pressing this button will display the Option Properties for the menu option or menu branch that is currently highlighted. This is useful in a support situation where helpdesk staff need to know the details of a menu option that a user is accessing.

Refresh
The Refresh button allows you to refresh the entire menu form. This is useful if menu options or menu branches have been changed using the Menu Maintenance form and you do not want to have to start a new session for the changes to take effect.

Close
The Close Button is used to end the current session. (Alternatively use Escape or F3)

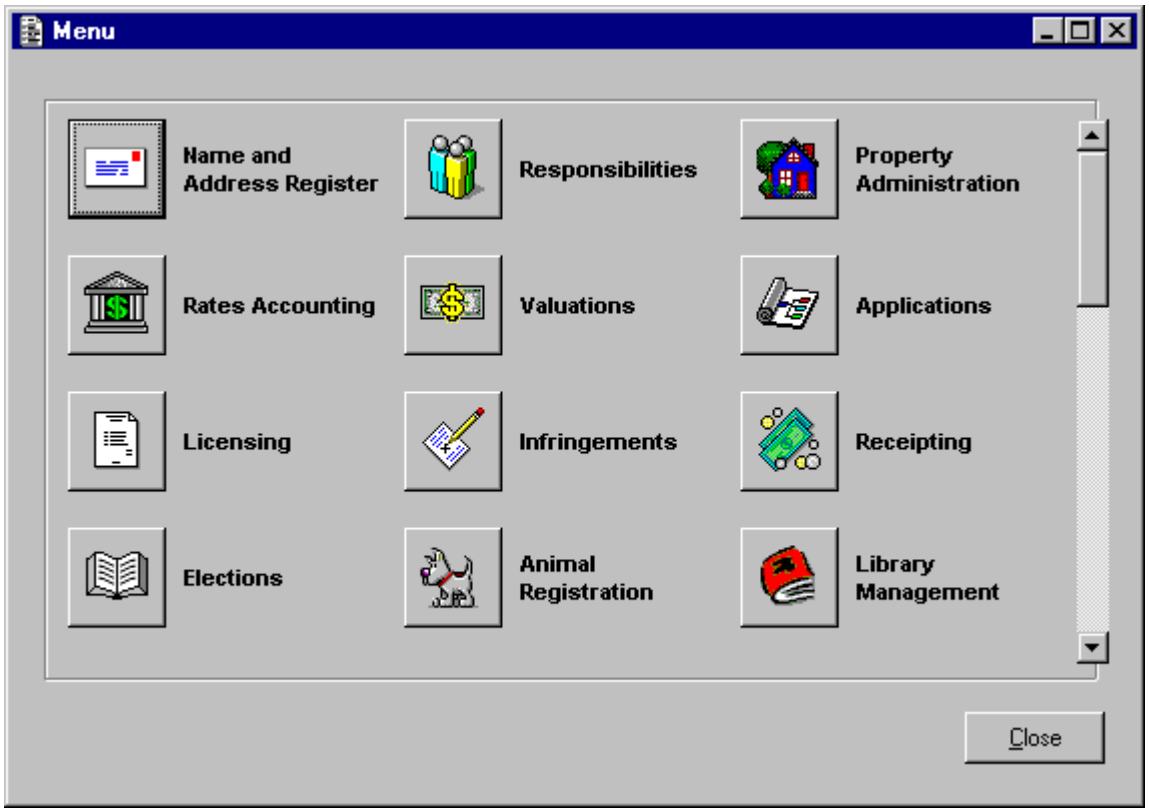
Menu (Button View)

The Tree style menu should be used in preference to the Button style because it supports new facilities such as changing the user group (menu) which the Button style menu does not cater for. At some point in the future the Button style menu will be discontinued.

Note that the menu options displayed are exactly the same whether the Tree or the Button style menu is used. The choice of style of menu is completely independent of the menu structure or menu options available to the user.

You may change to the Tree style menu at any time. (See User Preferences later in this manual)

Navigation around the Button menu remains the same as previous release levels (pre Release 2.06)



Menu Form (Button View)

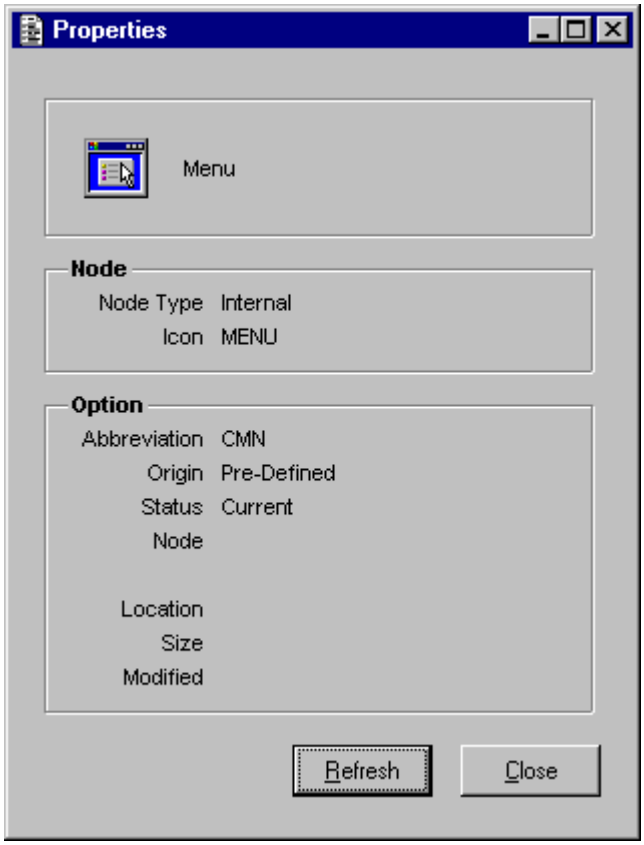
Icon and Description
The menu shows the icon and menu item name. A single click on the icon will either take you to the next menu level (if one exists) or start a program.

Close Button
The Close button can be used to close the currently active form and return to the previous form. If there is currently only one form opened (that is, the first instance of the button style menu form) then the Close button will end the current session.

Properties Form

Pressing the Properties button from the Menu will display the Option Properties for the menu option or menu branch that is currently highlighted. This is useful in a support situation where helpdesk staff need to know the details of a menu option that a user is accessing.

This form is for display purposes only and no modification may be made on this form.



Option Properties Form

Setting Up Users

The following forms describe the logical process of setting up a new user.

The following steps are required (as a minimum) to establish a new user in Pathway.

- User Maintenance (create the new user id, name and e-mail address)
- User Group Maintenance (assign the new user to a menu structure)
- User Preference Maintenance (change any preferences required)

Use the System Administration >> Menu >> User maintenance menu option to create the new user. This function is covered in the System User Guide.

Each User is allocated a User Identifier (UserID) as well as their full User Name and e-mail address (if applicable).

Once the User ID has been created it needs to be linked to a User Group. All Users must be assigned to a user group before they will be able to log on.

Please Note that the **SYSTEM** User Group is used during upgrades to ensure that menu options and branches are updated automatically. The SYSTEM User Group and its associated menu (SYSTEM) must NOT be deleted or modified.

User Groups are established to link together like Users and link them to a Menu.

Example

Rates ← User Group
Group
Rates Menu ← Menu that will be displayed
Joe Smith ← Users within the User Group
Betty Brown

Applications Group ← User Group
Applications Menu ← Menu that will be displayed
Alan Green ← Users within the User Group
John Burke

There is no limit to the number of User Groups held within the system.

There is no limit to the number of Users assigned to a User Group.

Please note that when adding a user to their first User Group the Password will be set to the same as the User ID (e.g. User ID BROWNJ will have a password of BROWNJ) The password will not be modified as they are added to any subsequent User Groups.

If you want to change the user group of a User it is advised that you should first add the user to the new user group and then remove the user from the old user group.

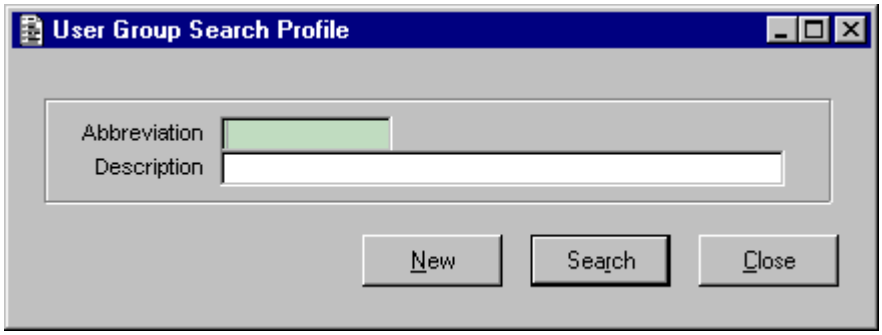
If you were to remove the user from their current user group first any user preferences that may exist would be lost. (This also includes their password)

To preserve user preferences always ensure that a user belongs to at least one user group.

User Group Search Profile

This form is the first form to be displayed when the User Group Maintenance menu option is selected. It allows you to enter a search profile to limit the number of records to be displayed.

You may press the New Button to create a new User Group.



User Group Search Profile Form

Abbreviation
Enter a User Group abbreviation in this field over which to perform your search. Leaving this field blank will not include the abbreviation in the search profile (essentially returning all user group codes)

Description
Enter a User Group Description (or part thereof) to limit your search.

Example
Enter *Rate* to return all Rates User Groups.

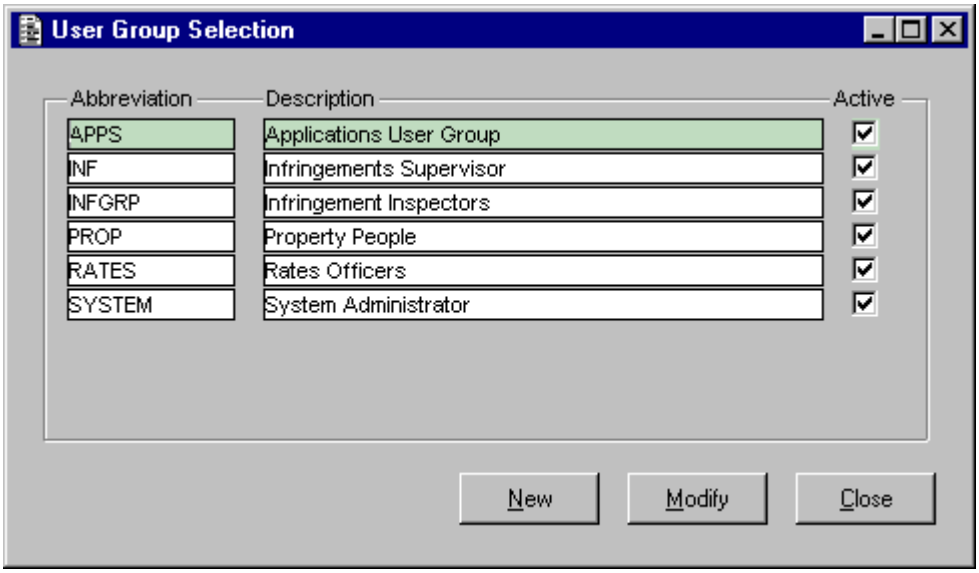
Leaving the field blank will not include the description in the search profile (essentially returning all user group descriptions).

User Group Selection Form

This form displays all User Groups that matched the search criteria entered.

From this form you may choose to Modify an existing User Group or alternatively create a New User Group.

Please Note that the **SYSTEM** User Group is used during upgrades to ensure that menu options and branches are updated automatically. The SYSTEM User Group and its associated menu (SYSTEM) must NOT be deleted or modified.



User Group Selection Form

Abbreviation
This field displays the User Group Abbreviation Code. Up to 10 characters are displayed.

This field is display only and may not be maintained.

Description
This field displays the full description of the User Group.

This field is display only and may not be maintained.

Active
This flag displays the “active” status of the user group.

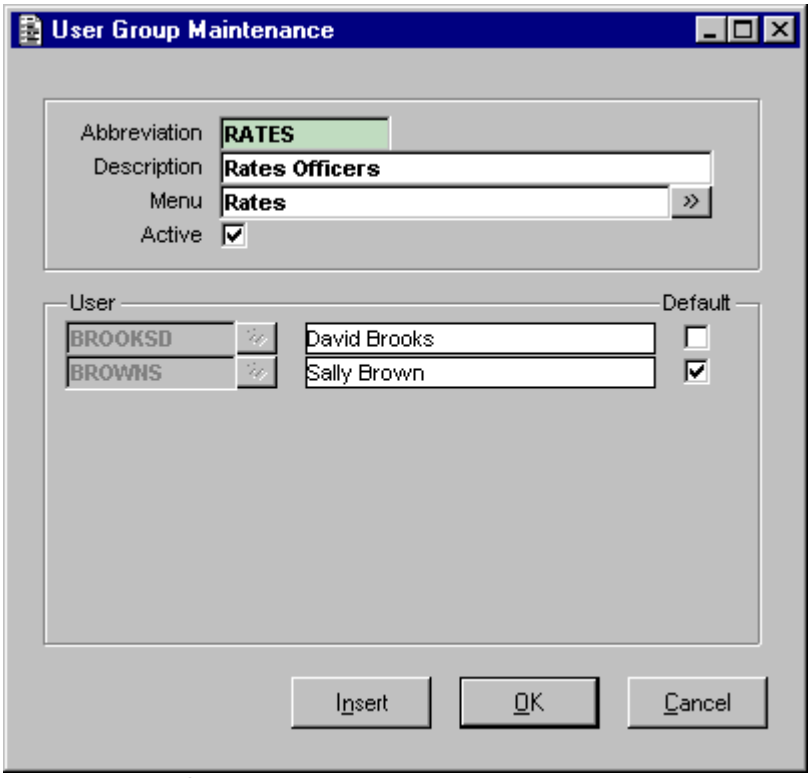
If the flag is turned on then the User Group is currently active.
If the flag is turned off then the User Group is not currently active. It will not be available for selection from other Pathway forms.

User Group Maintenance Form

This form is used to enter the details of the User Group as well as the Users that are assigned to that group.

To add a User to the currently displayed User Group press the Insert Button.

To remove a User from the currently displayed User Group press F11 (or Edit/Delete from the menu)



User Group Maintenance Form

Abbreviation
This field contains the abbreviation code for the User Group. Up to 10 characters may be entered. The User Group Abbreviation must be unique.

This field is mandatory.

Description
This field contains the full description for the User Group. Up to 50 characters maybe entered.

This field is mandatory.

Menu
This field contains the name of the menu that will be adopted by the user whenever the user logs on using this user group. For example, you may have created a menu called “Rates Clerk Menu” which contains only Rates programs.

If the name of the menu is known it may be entered directly into the field. If you have entered an invalid name the Node Pop Up will be displayed from which you may select a valid menu.

If the name of the menu is not known then press the Pop Up Button associated with the field (or alternatively double click or press F2)

Active
This field indicates whether or not the User Group is Active. Users will not be able to log on using this User Group unless the Active checkbox is ticked on.

User ID and Name
These fields contain the User ID and Name of all Users linked to this User Group.

To add a new user to the User Group press the Insert Button.

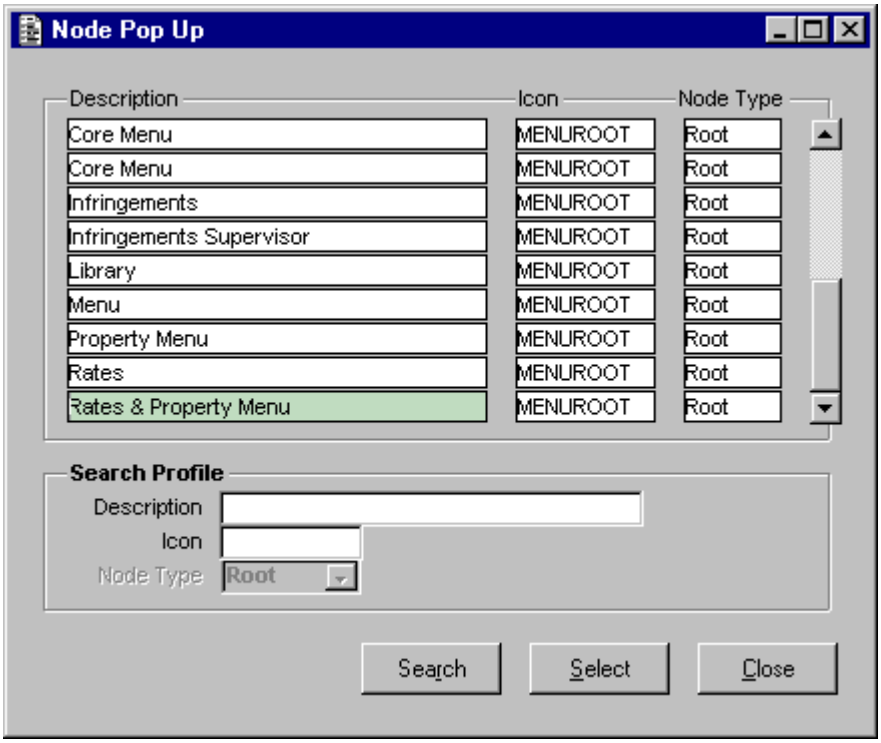
If the User ID is known it may be entered directly into the field. Alternatively, you may press the pop up button associated with the field to display the User Pop Up form from which you may select a user.

Default
This field is checked on if the current User Group is the default User Group for the User.

This field may not be modified on this form.

Node Pop Up Form

This form displays all menus available within the system.



Node Pop Up Form

Description
This field displays the main menu description. This field is display only and may not be maintained.

Icon
This field displays the icon name for the main menu. This field is display only and may not be maintained.

Node Type
This field displays the Node Type for the menu. This field is display only and may not be maintained.

Search Profile – Description
Enter a menu description (or part thereof) to search for specific menus. E.g. *Rates* will return all menus with the word Rates anywhere in the heading.

Search Profile - Icon
Enter an icon name (or part thereof) to search for specific menus.

Search Profile – Node Type

User Preferences Maintenance Form

Once a user has been assigned to a user group (or many user groups) it is possible to set some additional user preferences such as the style of menu and other security options such as the allowed number of login attempts.

On this form you may

- Add a User to another User Group (Insert Button)
- Remove a User from a User Group (F11 or Edit/Delete)
- Change the User Group to which a User belongs.
- Change some of the User Preferences.

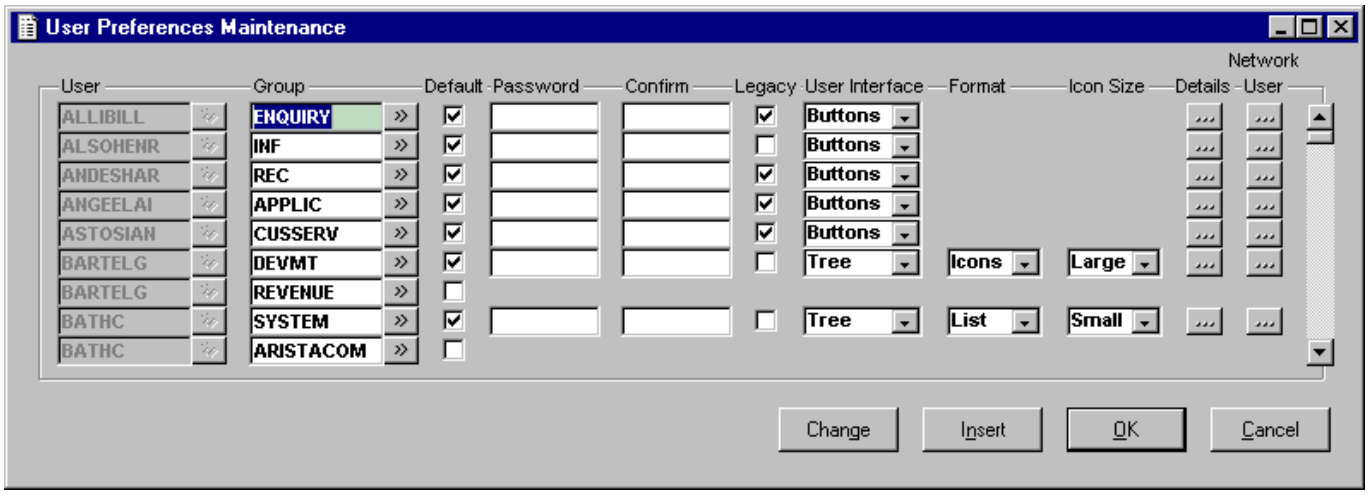
If you wish to remove a User from a User Group that is nominated as the default you must do this from User Group Maintenance.

This form is a standard “multi-occurrence general form”. You may notice that a Search Profile is not displayed when opening this form. It will automatically “retrieve” ALL user occurrences. If you wish to selectively display only a particular group then you should use the Search option from the menu at the top of the form.

Example
To retrieve all users in the Rates Clerks Group: -

- Clear the form by selecting the Search >> Clear Search Profile drop down menu option (or press Ctrl G)
- Enter the Rates Clerks Group abbreviation into the Group field.
- Retrieve all the user records by selecting the Search >> Perform Search drop down menu option (or press Ctrl R)

This form is called from the System Administration >> Menu >> User Preference Maintenance option.



User Preference Maintenance Form

User
This field contains the user id. If a User is already linked to a User Group then this field may not be modified.

If a user is being added to another User Group (i.e. the Insert Button has been pressed) then the User Id may be entered directly into the field or alternatively the pop up button may be pressed.

Group
This field contains the name of the user group to which the user is linked.

Default
If this check box is turned on it indicates that the User Group displayed is the current default for the User. The User Group (and its subsequent menu) will be initiated automatically.

The default User Group may be changed on this form.

Example
John Smith is in two User Groups – Rates Clerks and Customer Service (each of which have different menus attached). For the next 2 months John is rostered to the Customer Service desk. To change Johns default User Group click in the Default field for the Customer Service User Group. Note that the Rates Clerks User Group default flag is turned off automatically.

Password
This field contains the Password for the user. Note that it is not displayed on the screen.

To change the user's password enter the new password into the Password field and enter the same password into the Confirm field.

When first adding a user to the system Pathway will automatically default a password of the User Id.

Confirm
This field contains the Password confirmation text. When changing a Users password it must be entered into both the Password and Confirm fields identically. If the two passwords do not match the message "The confirmation password does not match the password" is displayed. Press OK on the message and re-enter both the Password and Confirm Password again.

Legacy
The Legacy field determines whether the password is additionally encrypted using the "legacy" encryption method. This should not be ticked on for new users. It will only be ticked when a user has been automatically migrated from the Release 2.05 menu system.

If the state of the Legacy checkbox is changed, for example from ticked to not ticked then the password and confirm password must be re-entered.

User Interface
This field controls the style of menu seen by the user. After upgrading from Release 2.05 to Release 2.06 all existing users will see the Button style menu. The Button style menu appears and behaves exactly the same as the menu in Release 2.05.

If you choose Tree from the drop down then the user will see the menu in the new Tree format.

If you wish to "swap" all users from the Button to Tree style menu then use the Change Button at the bottom of the form.

Individual Users as part of their personal preferences may change the User Interface.

Format
This field is only displayed if the User Interface selected is "Tree". This fields determines whether the menu options in the right hand side panel of the tree style menu are displayed in a vertical list or displayed as Icons with descriptions beneath each.

Icon Size
This field is only displayed if the User Interface selected is "Tree". It determines whether small icons (16 X 16) or large icons (32 X 32) are displayed in the right hand side panel.

Detail Button
Pressing this button will display the Additional Preferences Maintenance form.

Network User Button
Pressing this button will display the Network User Maintenance form.

Change Button
Pressing this Button will allow you to change the User Interface field for ALL displayed Users. Displayed Users means that if only one user is displayed then only that user will be modified.

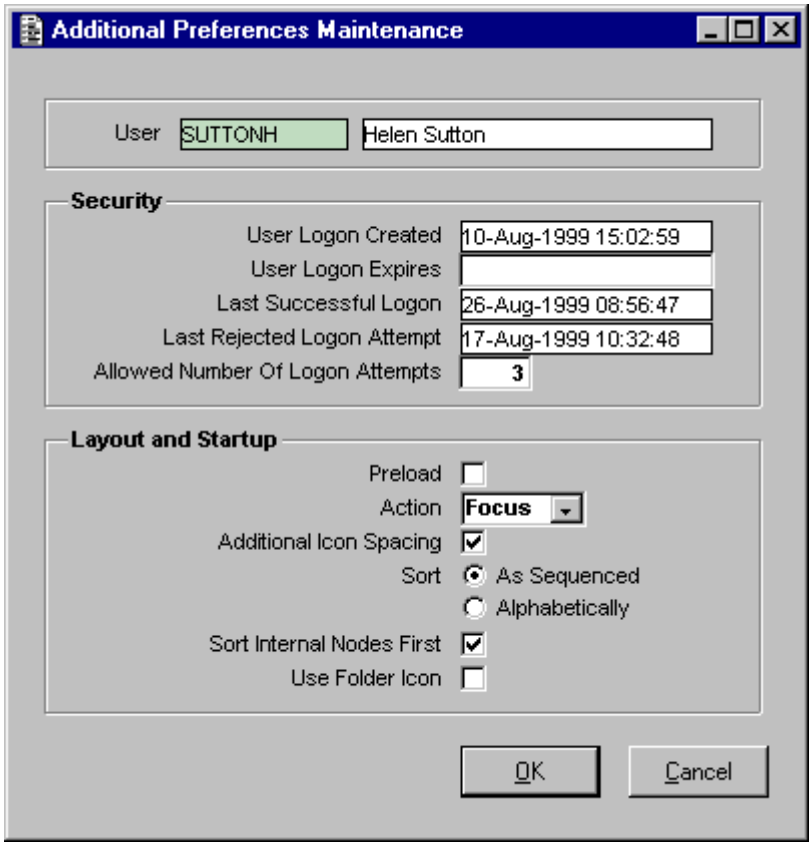
When the Change Button is pressed the following message is displayed: -

“All displayed users will be changed to a different user interface. Do you want all displayed users to adopt the Tree or Button user interface?” Three Buttons are then available: -

Tree – By pressing this button all displayed users will adopt the Tree style menu.
Button – By pressing this button all displayed users will adopt the Button style menu.
Cancel – By pressing this button no changes will be made to the User Interface.

Additional Preferences Maintenance Form

This form allows the setting of further preferences and security settings.



Additional Preferences Maintenance Form

User
This field displays the ID and name of the user to which the settings will apply.

This field is display only and may not be maintained.

User Logon Created
This field indicates the date and time that the user was first assigned to a user group, that is, the point in time at which the user was first capable of logging on. This field is automatically set by the system and may not be changed.

If the User has been converted from Release 2.05 to Release 2.06 then this date will default to the conversion date.

User Logon Expires

This field indicates the date and time that the user should no longer be allowed to log on. If the date and time on the client PC operating system clock exceeds this date and time then the user will not be able to log on from that client PC. Leave this field blank if you do not want to enforce an expiry date.

Last Password Change
This field indicates the date and time that the user's password was last changed.

Last Accepted Logon Attempt
This field indicates the date and time that the user last successfully logged on. This field is automatically updated and cannot be changed.

Last Rejected Logon Attempt
This field indicates the date and time of the last unsuccessful attempt by a user to log on (for example, because the wrong password was entered).

Allowed Number of Logon Attempts
This field indicates how many consecutive logon attempts the user may make before their user ID is made inactive.

Leave this field blank or set it to zero if you do not want to enforce a number of allowed logon attempts. It defaults to 3 for a new user.

Users should not be given the ability to re-activate their user Id's, that is, most users should not be given access to the User Maintenance form.

Preload
This field is only displayed if the tree style menu has been selected.

This field determines whether the entire menu structure is loaded into the menu form when the user logs on, or whether it is loaded on demand as the user expands branches of the menu tree.

Leaving the Preload checkbox ticked off means that the tree is loaded on demand and results in a quicker logon for the user, however navigation through the tree may be slower.

In general, it is recommended that the Preload checkbox be ticked off.

Action
This field is only displayed if the tree style menu has been selected.

This field determines the action that is performed when the menu is first displayed after logging on.

Focus

If set to Focus the focus is set to the first menu option branch shown in the left-hand panel.

Run

If set to Run the menu tree is searched in a "top down" manner until a menu option is found. The menu option is then automatically executed.

Additional Icon Spacing
This field is only displayed if the tree style menu has been selected.

This field determines whether 16 X 16 icons or 18 X 18 icons are used in the left-hand side panel.

If this field is checked off then the smaller 16 X 16 icons are used resulting in more menu options visible at once.

If this field is checked on then the larger 18 X 18 icons are used resulting in less menu options being visible however this usually provides a better layout.

This field only refers to icon sizing on the Left-hand side panel. The setting for the Right hand side panel is selected on the User Preferences maintenance form (Icon Size field).

Sort
This field is only displayed if the tree style menu has been selected.

Alphabetically

The menu options in both the left-hand side panel and the right hand side panel of the tree are sorted alphabetically.

As Sequenced

The menu options in both the left-hand side panel and the right hand side panel of the tree are sorted based on their sequence as defined using Menu Maintenance.

Sort Internal Nodes first
This field is only displayed if the tree style menu has been selected.

If this field is checked on then the menu branches (internal nodes) are sorted before any menu options in both the left-hand side panel and the right hand side panel.

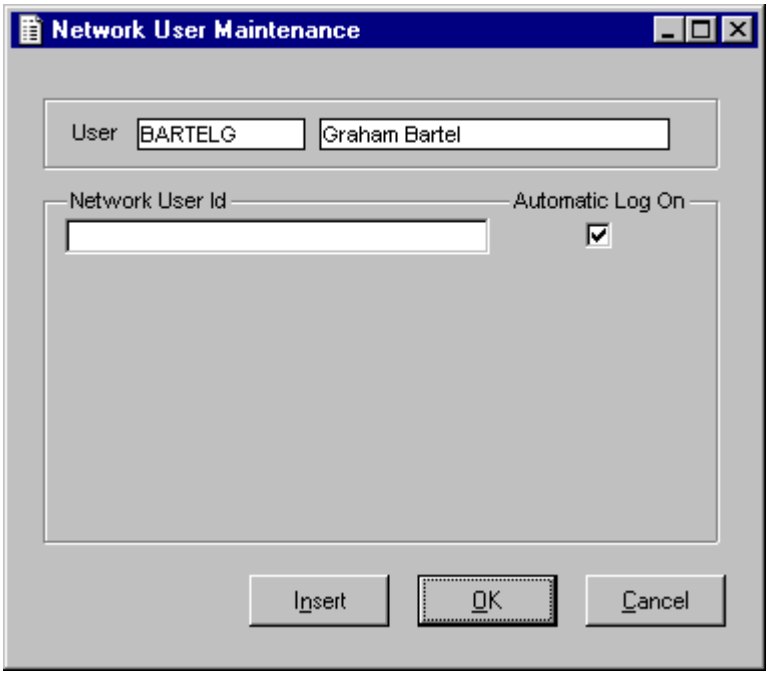
If this field is checked on then it takes precedence over the Sort field. The Sort setting will then be used for sorting within the menu branches and within the menu options.

Use Folder Icon
This field is only displayed if the tree style menu has been selected.

If this field is checked on then a folder icon will be used for menu branches rather than the icon specified within the menu itself.

Network User Maintenance Form

This form allows the entry of the Network User Id associated to the User within the Menu system. By ticking the Automatic Log On field the User will not be required to enter in the Sign On information when the Pathway Icon has been selected. The system will automatically sign the User on using the User and Password associated to the Network User Id.



Network User Maintenance form

User

This field displays the ID and name of the user to which the settings will apply.

This field is display only and may not be maintained.

Network User Id

The Network User Id associated to the User can be entered into this field. If there is an entry in this field and the Automatic Log On is ticked on then when the Network User selects the Pathway Icon they will automatically be signed onto Pathway with the User associated to the Network User Id.

Automatic Log On

Selecting the Automatic Log On box will automatically log the Network User onto Pathway when the Pathway icon is selected.

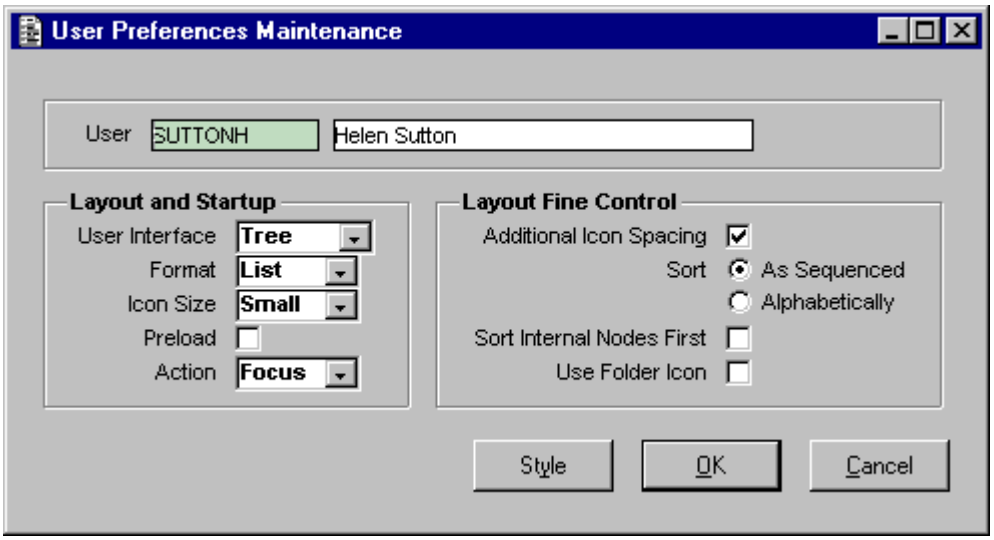
Changing Personal Settings

Each user has the ability to control how they view their Pathway menus.

User Preferences Maintenance Form

This form should be made available to all users. Only the current user settings can be changed.

The form may either be placed directly on the menu or alternatively selected from the File >> Preferences drop down menu option.



User Preferences Maintenance Form

User
This field displays the current user's ID and name.

This field is display only and may not be maintained.

User Interface
This field controls the style of menu seen by the user. After upgrading from Release 2.05 to Release 2.06 all existing users will see the Button style menu. The Button style menu appears and behaves exactly the same as the menu in Release 2.05.

If you choose Tree from the drop down then you will see the menu in the new Tree format.

Format
This field is only displayed if the User Interface selected is "Tree".

This fields determines whether the menu options in the right hand side panel of the tree style menu are displayed in a vertical list or displayed as Icons with descriptions beneath each.

Icon Size
This field is only displayed if the User Interface selected is "Tree".

It determines whether small icons (16 X 16) or large icons (32 X 32) are displayed in the right hand side panel.

Preload
This field is only displayed if the tree style menu has been selected.

This field determines whether the entire menu structure is loaded into the menu form when the user logs on, or whether it is loaded on demand as the user expands branches of the menu tree.

Leaving the Preload checkbox ticked off means that the tree is loaded on demand and results in a quicker logon for the user, however navigation through the tree may be slower.

In general, it is recommended that the Preload checkbox be ticked off.

Action
This field is only displayed if the tree style menu has been selected.

This field determines the action that is performed when the menu is first displayed after logging on.

Focus

If set to Focus the focus is set to the first menu option branch shown in the left-hand panel.

Please note that Focus is only option for this form. If you require the Run action then contact your supervisor. The explanation of the Run Action is given below.

Run

If set to Run the menu tree is searched in a “top down” manner until a menu option is found. The menu option is then automatically executed.

Additional Icon Spacing
This field is only displayed if the tree style menu has been selected.

This field determines whether 16 X 16 icons or 18 X 18 icons are used in the left-hand side panel.

If this field is checked off then the smaller 16 X 16 icons are used resulting in more menu options visible at once.

If this field is checked on then the larger 18 X 18 icons are used resulting in less menu options being visible however this usually provides a better layout.

This field only refers to icon sizing on the Left-hand side panel. The setting for the Right hand side panel is selected via the Icon Size field.

Sort
This field is only displayed if the tree style menu has been selected.

Alphabetically

The menu options in both the left-hand side panel and the right hand side panel of the tree are sorted alphabetically.

As Sequenced

The menu options in both the left-hand side panel and the right hand side panel of the tree are sorted based on their sequence as defined using Menu Maintenance.

Sort Internal Nodes First
This field is only displayed if the tree style menu has been selected.

If this field is checked on then the menu branches (internal nodes) are sorted before any menu options in both the left-hand side panel and the right hand side panel.

If this field is checked on then it takes precedence over the Sort field. The Sort setting will then be used for sorting within the menu branches and within the menu options.

User Folder Icon
This field is only displayed if the tree style menu has been selected.

If this field is checked on then a folder icon will be used for menu branches rather than the icon specified within the menu itself.

Style Button
The Style Button can be used to quickly set all options to pre-defined settings. Three pre-defined configurations are available: -

Button

Simply sets the User Interface to the Button type menu.

Icon

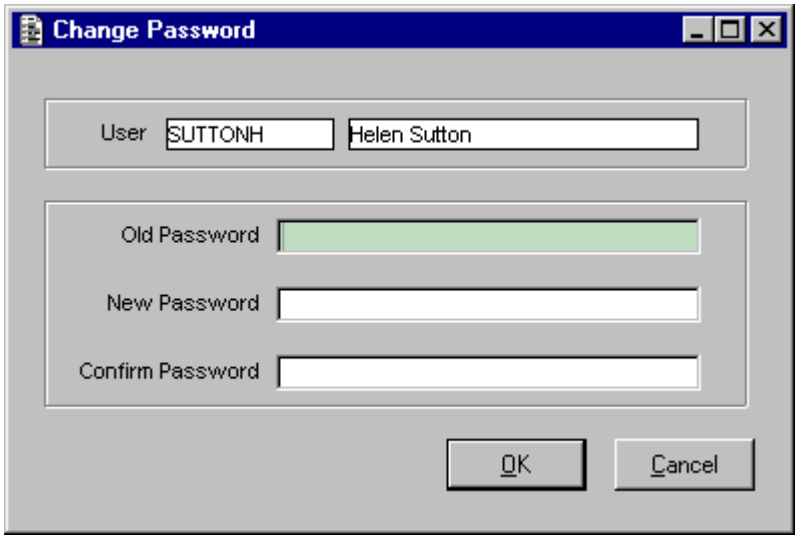
Sets the User Interface to Tree and sets the other options so that menu branches are displayed using the icon that is specified in the menu, rather than a folder. The menu sort option will be set to “As Sequenced” rather than alphabetically.

Folder

Sets the User Interface to Tree and set the other options so that menu branches are displayed using a “folder” icon. Menu branches will be displayed in sequence before menu options, and within menu branches and menu options, the sequence will be alphabetical.

Change Password Form

Each User may change their current password when required. This form may be placed directly on the menu or alternatively called from the File >> Change Password drop down menu. (The File >> Change Password option is only available from a menu, not from within a program.)



Change Password Form

User
This field displays the current user's ID and name.

This field is display only and may not be maintained.

Old Password
Enter your old password.

New Password
Enter your new password. Your new password must be at least 1 character different to your old password.

Confirm Password
Re-enter your new password.

For your password to be successfully changed the values in the New Password and Confirm Password fields must be identical.

Menu Set Up

This Chapter describes the establishment of parameters that control the Menu System.

The following topics are covered in this section:

Overview
Creating and Maintaining Menus
Options
Setting and Automating Log On
Parameters
Invalid Log On Enquiry
Transaction Audit Enquiry
Transaction Maintenance
Transaction Processor
Hot Link Menu Maintenance

Overview

A menu consists of its individual menu options and branches and the structure in which these menu options and branches are organised.

A set of pre-defined menu options and menu branches have been provided. These menu options and branches are also user definable via the Option Maintenance form.

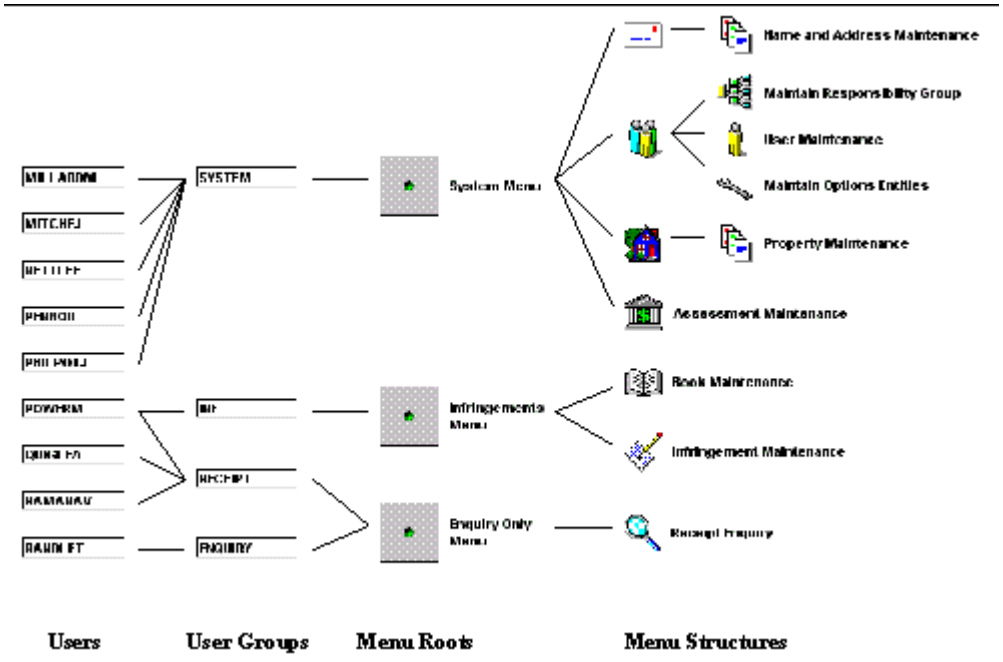
Menu options and menu branches are collectively referred to as “nodes” in the following sections.

As of Release 2.06 it is no longer possible to create or maintain nodes in the menu associated with the SYSTEM User Group. By default this menu is called “System Menu”. Nodes in the System Menu are automatically updated by an upgrade and should only be modified by the upgrade.

DO NOT MODIFY THE SYSTEM MENU

If you need to modify the System Menu then make a copy using the Menu Maintenance form and modify the copy instead.

The following diagram provides an overview of the menu system.



In the example above the following points should be noted:

- Each User is the member of one or more User Groups. For example, the NETTLEE User is a member of the SYSTEM User Group. The POWERM User is a member of the INF and RECEIPT User Groups.

- Each User Group is associated with a Menu Root Node. For example, the INF User Group is associated with the Infringements Menu Root Node. The SYSTEM User Group is associated with the System Menu Root Node.

- Each Menu Root Node is the head of a Menu Structure (the actual menu seen by the user). For example, the Infringements Menu Structure has two menu options. The System Menu structure has a total of three menu branches and a total of six menu options.

Menu Maintenance

Menu Maintenance Form

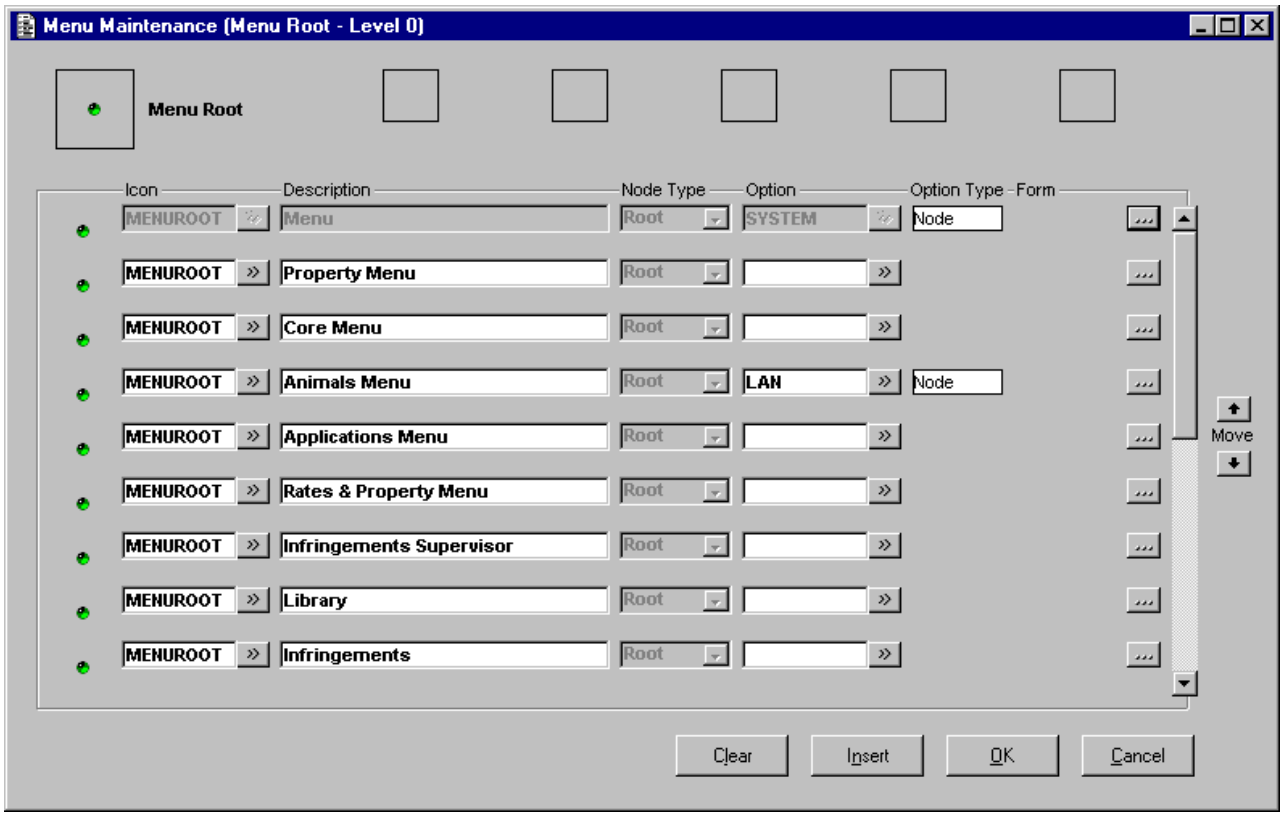
This form allows for the creation and modification of menus within the system.

This form is accessed via the System Administration >> Menu >> Menu Maintenance menu option.

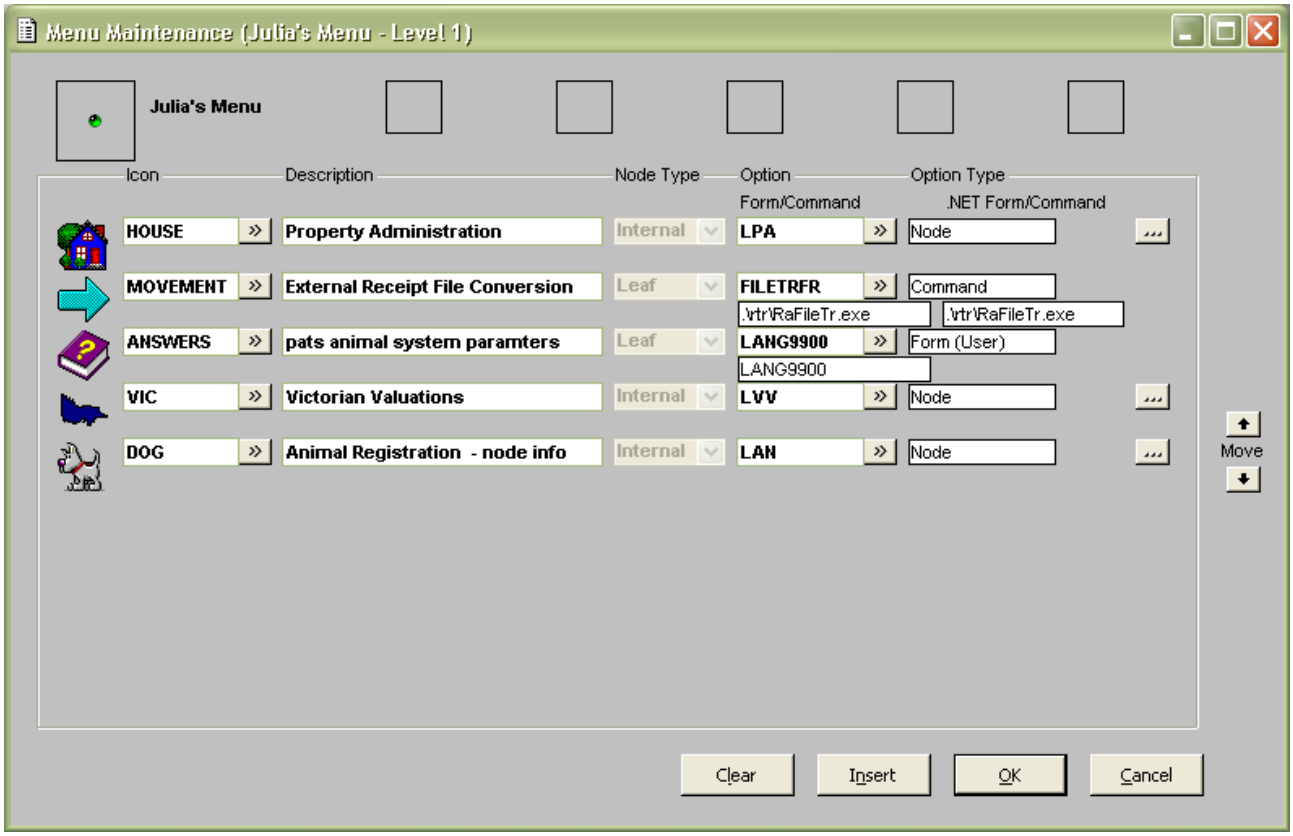
The first form you will see when starting Menu Maintenance is a list of Menu Root nodes. Each represents the starting point of a menu structure.

A user of the system never sees the Menu Root Nodes. Instead, they are used as a “handle” on the menu structure when defining a user group. (For example the SYSTEM User Group specified “System Menu” as its menu structure.)

A Menu Root Node may be used by more than one User Group. For example you may define an Enquiry Only Menu Root. The Receipting User Group and the Building User Group could then use the Enquiry Only menu.



Menu Maintenance Form (Menu Root)



Menu Maintenance Form (First Level)

Icon

This field represents the name of the Icon that will be displayed to the user. Enter an Icon Name (if known) or alternatively press the pop up button associated with the field to choose from the Icon Pop Up form. The Icon you have selected will be displayed to the left of the menu record.

If you are on the Menu Root form and insert a new menu, the MENUROOT Icon will be automatically selected.

Description

This field contains the description of the Node that will be displayed to the User. Up to 100 characters may be entered.

This field is mandatory.

Node Type

This field indicates whether the record represents a branch or an option.

Internal – Represents a menu branch
Leaf – Represents a menu option

Menu Root Nodes are a special case and are identified by the Node Type "Root". This field is not available on the Menu Root maintenance form. It is automatically populated with Root.

Note that once the Node has been stored the node type can no longer be changed.

Option

This must be provided for a Leaf Node since it identifies the form or operating system command for the menu option.

It is optional for an Internal Node, but if used means that the Node can be automatically updated during an upgrade.

When entered the Icon and Description will automatically default to the Icon and Description specified for the option.

If the Option name is known it may be entered directly into the field. Alternatively you may press the Pop Up Button associated with the field to display the Option Pop Up Form from which you may make your selection.

Specifying an Option on an Internal Note is a **recommended** practice. For example, if you create your own tailored menu branch and call it “Property Administration – Enquiry Only” you should specify the “LPA” option against it.

If you do this it means that when a new menu option is added or removed by Infor under the “Property Administration” menu branch then it will be automatically added to or removed from your tailored menu branch at the next upgrade.

To determine the options that you should use examine the System Menu. The System Menu has options against all of its menu branches. Also note that when you copy or move an existing menu option or menu branch the option information is automatically copied as well.

Option Type
This field displays the Option Type (“Form”, “Node” or “Command”).

If the Option is User Defined then the text “(User)” is appended to the Option Type. However, if the Option is Pre-Defined then no additional text will appear.

This field is display only and may not be maintained.

Form / Command
This field is only displayed if the Node Type is “Leaf” and the Option Type was “Form”. It displays the form name that will be executed when this menu option is run.

This field is display only and may not be maintained.

Command/Web URL
This field is only displayed if the Node Type is “Leaf” and the Option Type was “Command”. It displays the command that will be executed or the web URL that will be displayed when this menu option is run.

This field is display only and may not be maintained.

.NET Form / Command
This field is used by Pathway 3. This field is display only and may not be maintained.

Detail Button
Pressing this button will take you to the next level down in the menu structure.

Move Up/Down Buttons
These buttons maybe used to re-arrange the order of the records. Highlight the record that you want to move and then press either the up or down button. The record will be moved up or down the list.

Clear Button
This button is used to clear any menu nodes that may have been placed on the clipboard. Menu Nodes are placed on the clipboard via the Copy/Move process. Please refer to that Section Heading further in this document.

Copying and Moving Menu Nodes

Menu Nodes may be copied or moved to a different location in the menu structure.

This is a two step process.

Step One
(Copy the Menu Node to the clipboard)

- Click and hold down the mouse button on the Icon for the menu node that you wish to Copy or Move to a different location.
- Move the mouse slightly and you will notice that the mouse cursor takes on the silhouette of the Icon being copied.
- Still holding down the mouse button move the cursor up to the top of the form until it is positioned over the first empty box.
- Now release the mouse button. If the process is successful the box should contain a copy of the icon and its associated description that you moved.

This process may be repeated up to five times for different menu nodes.

Step Two
(Move or copy the Menu Node to its destination location)

- Go to the appropriate menu level that you want to place the item on.
- Now, Click and hold down the mouse button on the Icon that you copied previously and "drag" it down the form until it is positioned over the Icon on the Node location you require. (Note you cannot position over a "Leaf" type Node.)
- Now release the mouse button.
- A message will be displayed asking whether you wish to "Copy" or "Move". If you select Copy then the original menu node will be left in its original location and a copy will be made to the destination location.
- If you select "Move" then the original menu node will be deleted and the menu node will only exist in its new location.
- A message will be displayed in the status bar at the bottom of the form indicating that the copy or move was performed successfully.

Notes on Moving

- When a menu branch is moved all nodes under the menu branch are also moved, and any nodes under these nodes are also moved (and so on).
- It is not possible to **move** a menu branch under itself. It does not make sense to move a menu branch under itself. An error message will be issued if this is attempted. However, it is possible to **copy** a menu branch under itself.
- Up to five nodes can be dragged and dropped to the boxes at the top of the form. The nodes in the boxes will remain for the entire session. The boxes can be cleared using the Clear Button.
- Once a copy or move operation has been performed using a node from one of the boxes there is no problem performing a subsequent move or copy operation using the same node from the same box.
- If a node is deleted after it has been copied to a box at the top of the form then the box will not be cleared. However an error message will be issued and no action will be taken if an attempt is made to use such a node in a subsequent copy or move operation.
- A node cannot be dragged and dropped until it has been stored in the database. This usually involves closing and then opening the Menu Maintenance form or clicking on a Detail Button.
- It is also possible to drag and drop to the icon at the top left-hand corner of the form. This icon represents the "parent" menu branch of all the "child" nodes displayed lower on the form. This is similar to the parent-child structure of the actual menu system.

Reserved Icons

- The white cross on a red background and the green glass bead are images reserved for use by the menu. It is not possible to directly create a menu option that uses either of these images.

- The white cross is most often displayed when a node has just been created and an icon has not yet been selected. It is also sometimes used after a node has been deleted, but a copy remains in one of the boxes at the top of the Menu Maintenance form.
- The green bead represents a “menu root”. A new record inserted on the first Menu Maintenance form defaults to this icon. If a “menu root” is copied or moved to a location other than the first Menu Maintenance form then its icon is automatically changed to a white cross icon. This ensures that the green bead icon is not used anywhere else in the menu structure.

Option Maintenance

Options that can be used in the structure of the menus are created and maintained using the Option Maintenance form.

An Option may represent an actual menu option (such as a form or operating system command) for example “Assessment Maintenance” or it may represent a menu branch for example “Rates Accounting”.

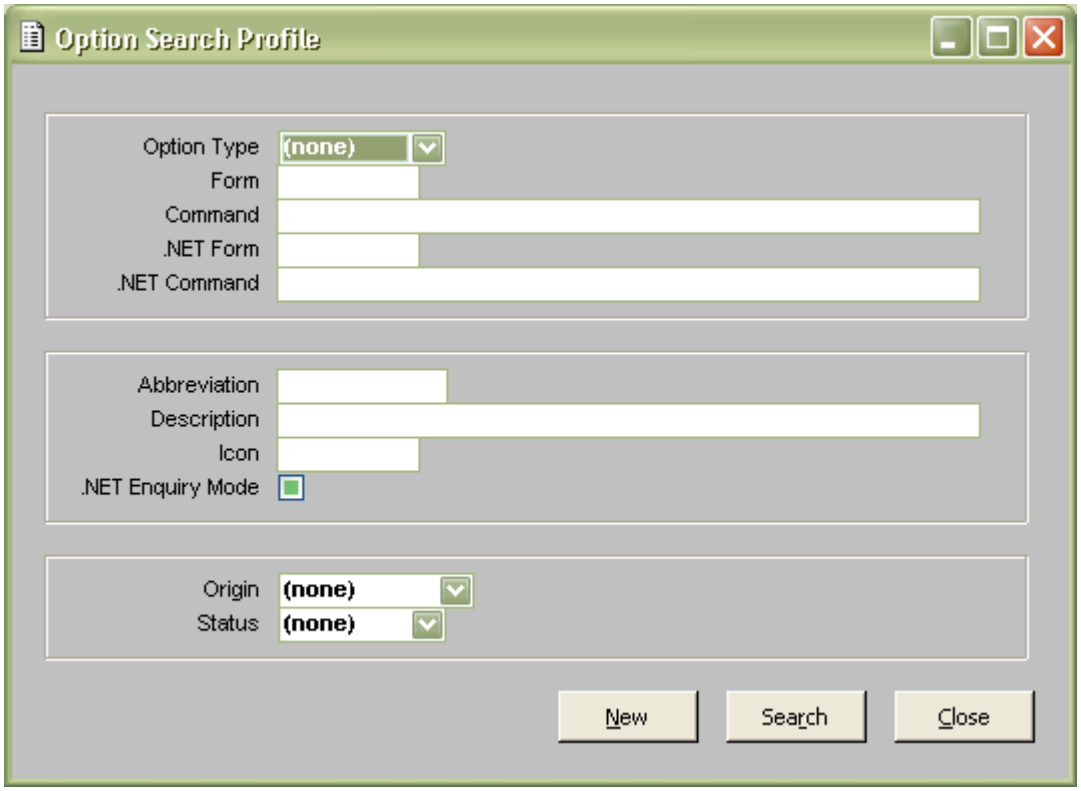
Only Pre-Defined Options will be distributed by Infor. These Pre-Defined Options are non-maintainable by the user. They will be automatically updated at each upgrade (if required).

Any Options that you create will be User Defined.

Option Search Profile Form

This form is a standard search profile and may be used to enter search criteria.

If no criteria are entered then all Options will be displayed.



Option Filter Form

Option type
A value entered in this field will restrict the search to options of a specific type.

Form – will return all options that are specifically Forms.
Node – will return all options that are menu branches.
Command – will return all options that are specifically Command/Web URL options.
(none) – will not include the Option Type in the search profile.

Form

Enter a form name (or part thereof) to restrict your search.

Command
Enter an operating system command or web URL (or part thereof) to restrict your search.

.NET Form
Used by Pathway 3.

.NET Command
Used by Pathway 3.

Abbreviation
Enter an abbreviation (or part thereof) to limit the search.

Leave blank to include all abbreviations.

Description
Enter a Description (or part thereof) to limit the search.

For example by entering *Transfer* all Options with the word Transfer in the description will be retrieved.

Icon
Enter an Icon name to retrieve all Options sharing the Icon.

For example by entering SESSIONS in this field all Options using that Icon will be retrieved.

.NET Enquiry Mode
Used by Pathway 3.

Origin
Select a value from the drop down list. Selecting (none) will include all Options.

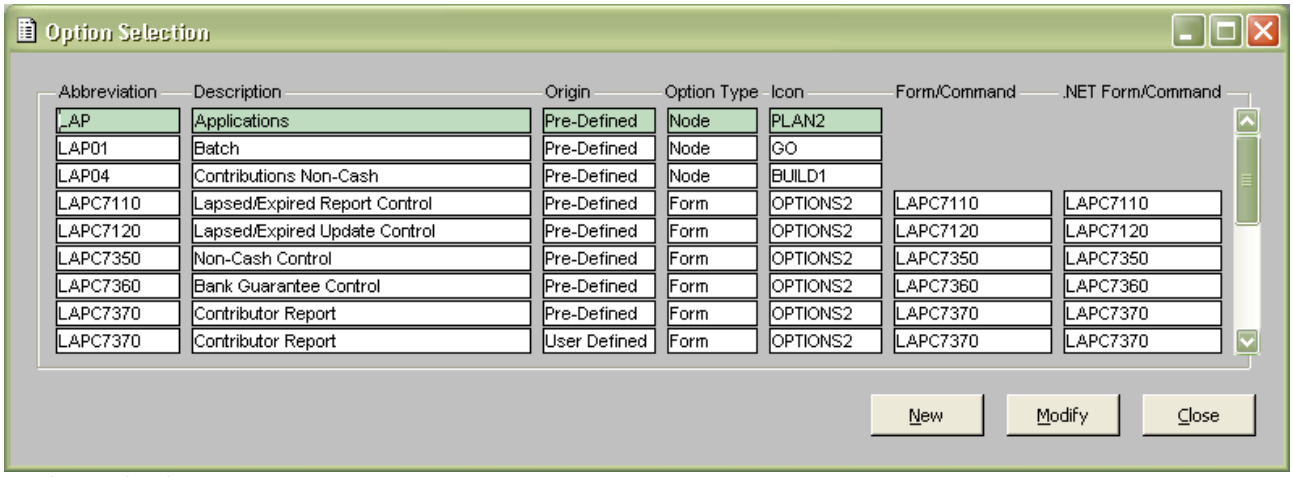
By selecting User Defined you would limit your search to Options that have been created by you.

Status
Selecting a value from the drop down list will restrict the search by Status. Selecting (none) will include all Options regardless of Status. Selecting (current) will include all current only Options.

Option Selection Form

This form displays all Options that matched the search profile criteria entered on the Option Search Profile.

From this form you may create New Options (New Button) or Modify existing Options. Options that have an origin of Pre-Defined may not be modified.



Option Selection Form

Abbreviation
This field displays the Abbreviation of the Option record.

This field is display only and may not be maintained.

Description
This field contains the full description of the Option record.

This field is display only and may not be maintained.

Origin
This field displays the origin properties for the Option record.

If the value is Pre-Defined it will be automatically updated at each upgrade.

This field is display only and may not be maintained.

Icon
This field displays the icon name in use by the Option.

Form
This field displays the form name that will be run when the menu option is selected.

This field is display only and may not be maintained.

Option Type
This field displays what type of option the record is designated as, Form, Node or Command.

This field is display only and may not be maintained.

Form/Command
It displays the system command that will be run or web URL that will be opened when the menu option is selected.

This field is display only and may not be maintained.

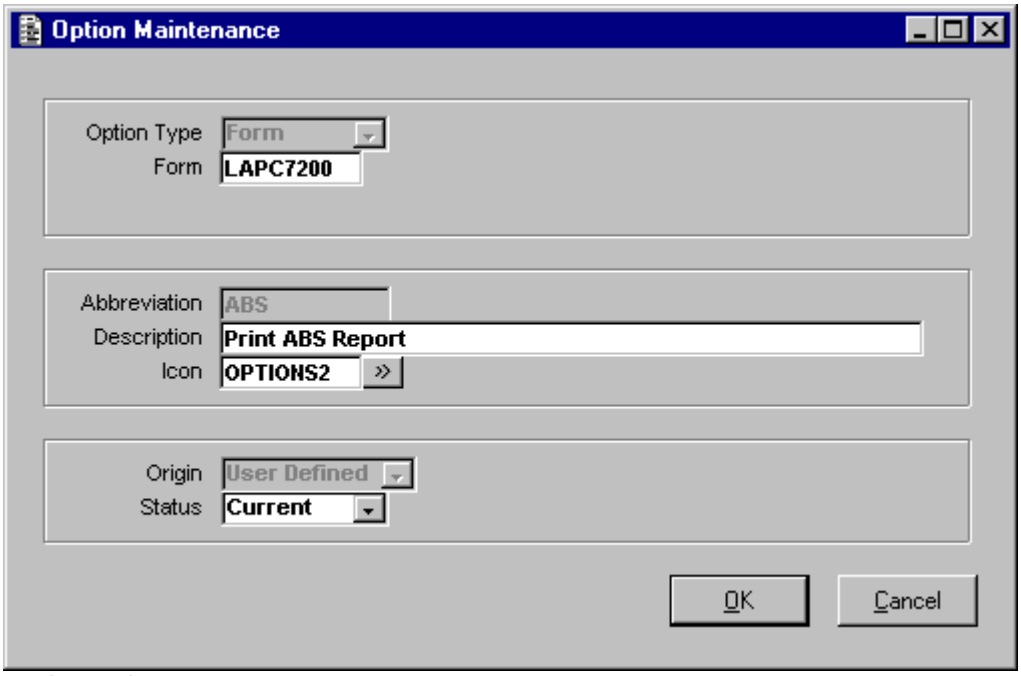
.NET Form/Command
This field is used by Pathway 3.

Option Maintenance Form

This form allows the creation and maintenance of Options that may be used in the structure of a menu.

Only User Defined Options may be created or maintained.

When maintaining an existing “User Defined” option the Abbreviation field will be greyed-out indicating that it cannot be modified. If a different Abbreviation is required then the existing option must be deleted and a new option created with the desired Abbreviation.



Option Maintenance Form

Option Type
This field can be Form, Command or Node.

If Form is selected a form field is displayed so that a form name can be entered.

If Command is selected the Command field is displayed so that an operating system command can be entered.

If Node is selected this indicates that the Option is merely a Menu Branch and the Form and Command fields will not be available.

Form
This field is only displayed if Form has been chosen as the Option Type.

Enter the form name to be run when this option is executed.

Command/Web URL
This field is only displayed if Command has been chosen as the Option Type.

Enter a system command to be run or web URL to be displayed when this option is selected. To be recognised as a web URL it must start with the text “http:”, “https:”, “ftp:” or “www.” (in upper case or lower case).

Note: Relative path references in Smart Client menu options should be changed to absolute path references so that they will work in the Smart Client.

These types of menu options (with an "Option Type" of "Command") are relatively uncommon. In most cases this type of menu option will already have an absolute path.

Changes can be made to these menu options by logging on as SCASYS and navigating to System Administration >> Menu >> Option Maintenance. Search for options with an "Option Type" of "Command".

More Information:-
An operating command that uses a relative path reference will work correctly under the Thick Client. For example, a Thick Client menu option that contains the operating system command ".\rtr\RaFileTr.exe" will correctly find RaFileTr.exe in the "rtr" subfolder relative to the working directory (where the working directory might be "\\MYSERVER\MyShare\Pathway\Prod").

However a similar menu option that uses a relative path will fail in the Smart Client. This is because the Smart Client does not have a working directory in the same way that the Thick client has a working directory. To avoid this issue the relative path in the menu option should be changed to an absolute path, for example, "\\MYSERVER\MyShare\Pathway\Prod\rtr\RaFileTr.exe".

If this change is not made then the following error will appear in the Smart Client when attempting to start the menu option: Could not find or could not start ".\rtr\RaFileTr.exe".

Abbreviation
This field contains the Abbreviation that is used to identify the option. If a form name was entered then this field will default to the form name.

No two options can have the same abbreviation. I.e. this field is unique.

Description
This field contains the description that will be displayed in the menu.

Icon
This field contains the default icon for the option. It is the name of the icon that will appear in the menu. Use the Pop Up button to select from the list of available icons. (Only the 32 X 32 sized icons are displayed on the Pop Up)

Icon Pictures
This fields show the icon picture selected, represented as 32 X 32 and 16 X 16.

Origin
This field indicates whether the option is Pre-Defined (and so will be automatically updated at each upgrade) or is User Defined.

Any options you create will always be User Defined.

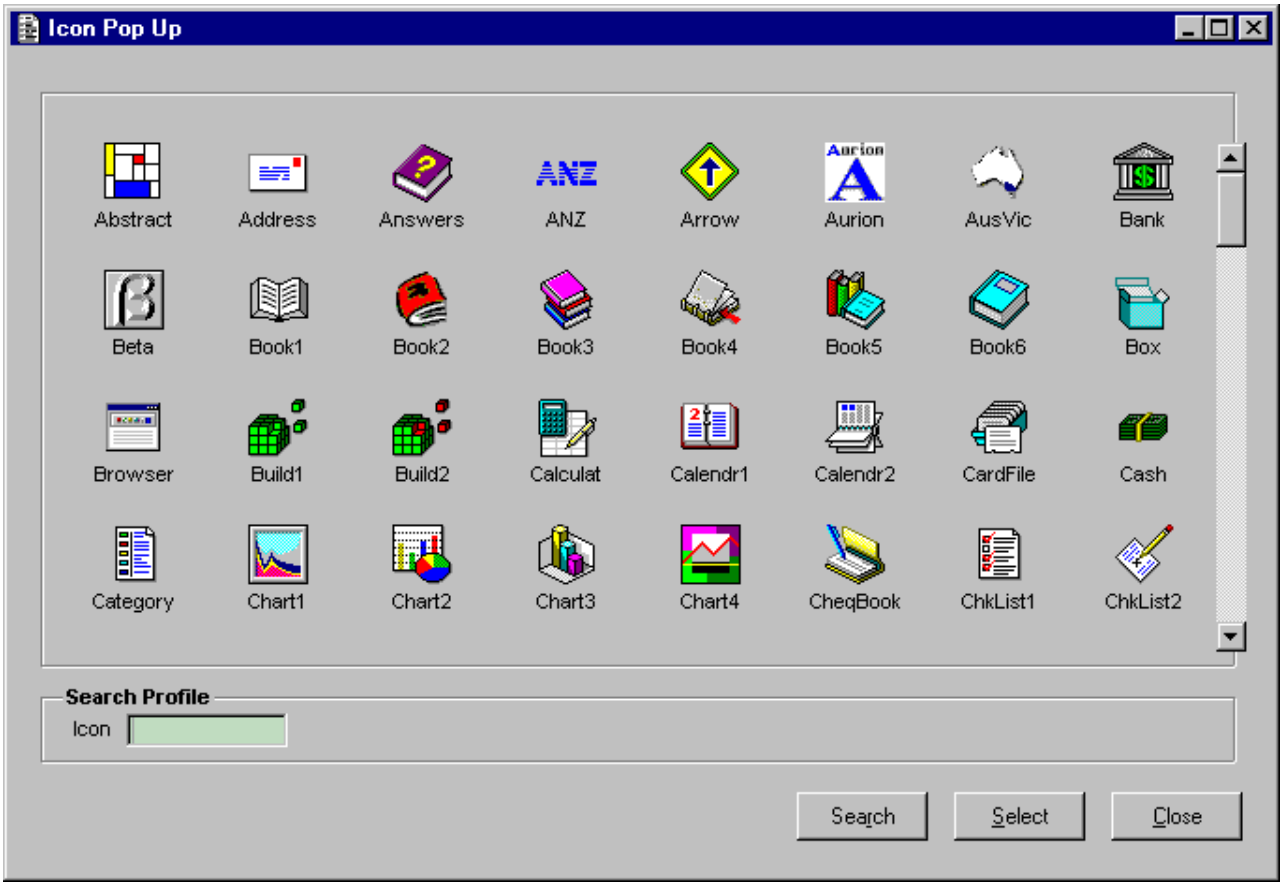
This field is display only and may not be maintained.

Status
This field indicates the status of the option. It is used in conjunction with the automatic update of options. It currently has no effect for a User Defined option and so should be left at its default value of “Current”.

.NET Fields
These fields are use by Pathway 3.

Icon Pop Up Form

This form is a standard pop up form and displays all available icons for use in the menu system. This form displays only the 32 X 32 size version of the icon. There are several other sizes of each icon which are not shown on this form.



Icon Pop Up Form

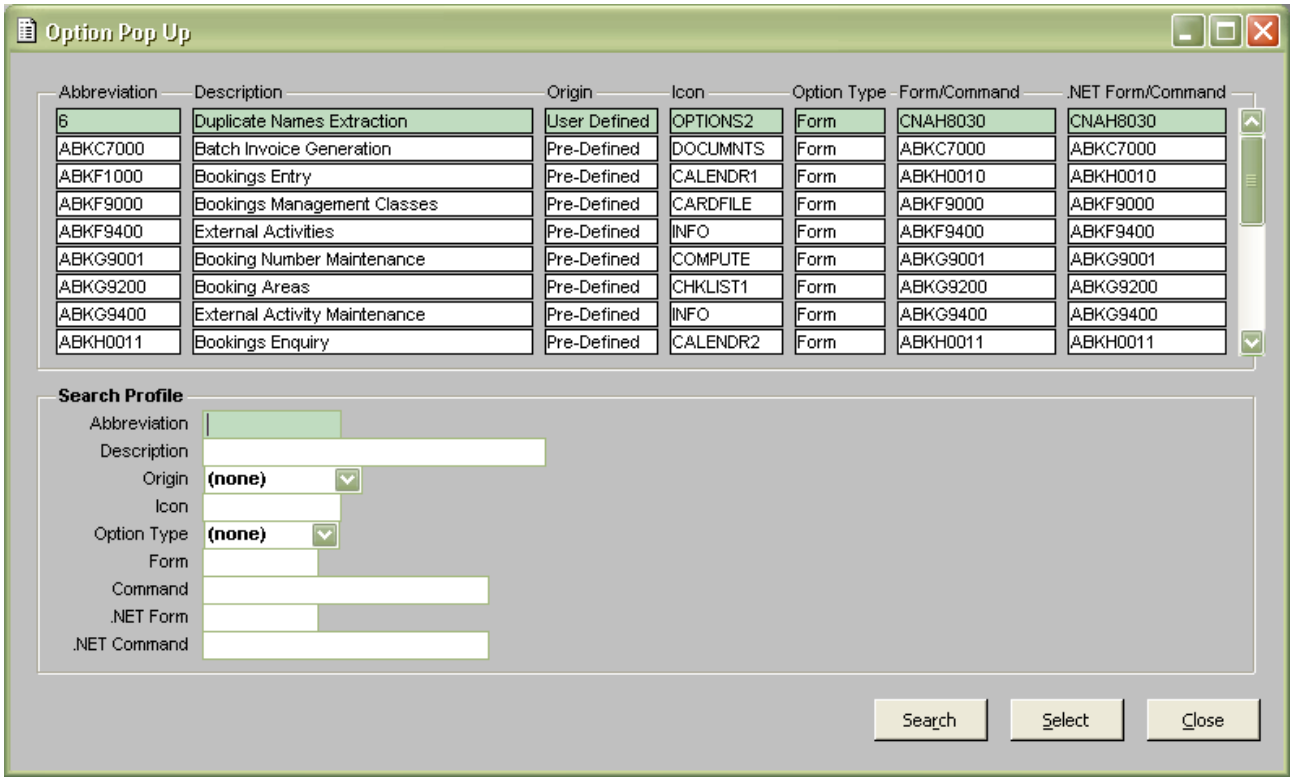
Icon

An image of each Icon and its name is displayed on this form.

Use the Icon field to search for a known Icon Name.

Option Pop Up Form

This form is a standard pop up form and displays all available Options for selection.



Option Pop Up Form

Abbreviation
This field displays the Abbreviation of the Option record.

This field is display only and may not be maintained.

Description
This field contains the full description of the Option record.

This field is display only and may not be maintained.

Origin
This field displays the origin properties for the Option record.

If the value is Pre-Defined it will be automatically updated at each upgrade.

This field is display only and may not be maintained.

File Name
This field displays the file name of the Icon that is used for the Option.

This field is display only and may not be maintained.

Option Type
This field displays the Option Type. Form, Command or Node.

This field is display only and may not be maintained.

Form / Command
This field is only displayed if the Option type is Form or Command.
FORM
It displays the form name will be run when the menu option is selected.

This field is display only and may not be maintained.

COMMAND
This field is only displayed if the Option type is Command.

It displays the system command that will be run or the web URL that will be displayed when the menu option is selected.

This field is display only and may not be maintained.

.NET Form / Command
This is used by Pathway 3

Search Profile – Abbreviation
Enter a value to search via the Option Abbreviation.

Search Profile – Description
Enter a value of part thereof to search via the Option Description.

Example – Find all Options with the word Rates contained within the description. (Enter as *Rates*)

Search Profile – Origin
Enter an Origin value to search via the origin type. E.g. User Defined or Pre-Defined

Icon
Enter an Icon name to search via the icon description.

Option Type
Select an Option Type to limit the search. The value in this list will change depending on the type of menu item being inserted.

If the menu item being inserted is an “Internal” node then only “Node” will be available in the Search Profile.

If the menu item being inserted is a “Leaf” node then “Form” and “Command” will be available.

Form
Enter a form name (or part thereof) to find options related to specific forms.

For example by selecting Form as the Option Type and entering LRA* in this field the search will return all Rates programs.

Leave blank to include all Forms.

Command
You may enter a command name or web URL (or part thereof) to find options related to specific commands or web URLs.

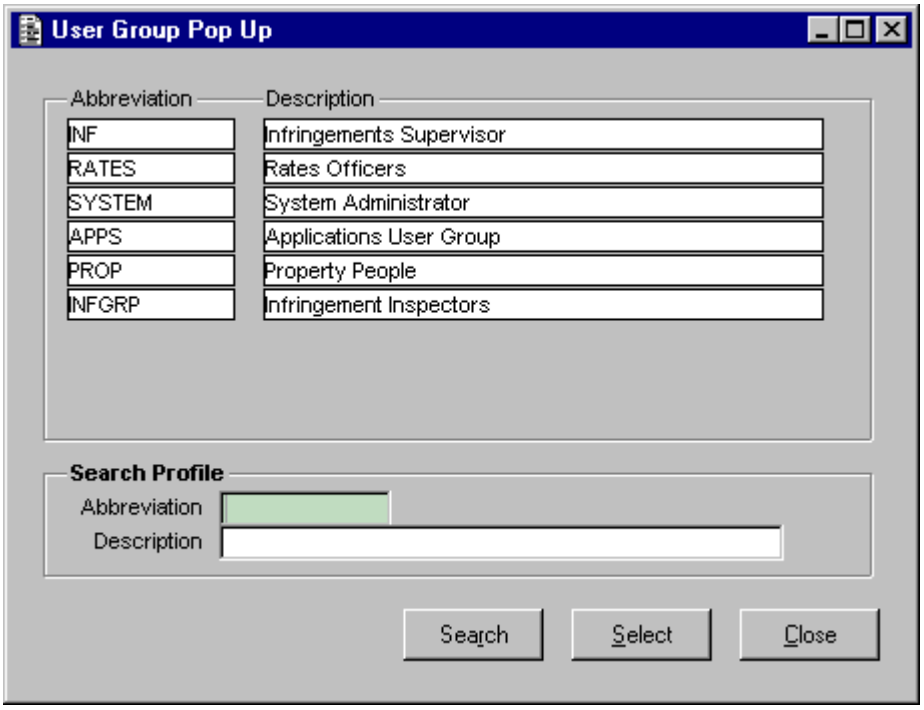
For example by entering *TRFR* all Bank Tape File Transfer options will be retrieved.

Leave blank to include all commands.

User Group Pop Up Form

This form is a standard Pop Up form. It displays all User Groups within the system.

A standard search profile is available at the bottom of the form.



User Group Pop Up Form

Abbreviation
This field contains the Abbreviation that has been allocated to the User Group.

This field is display only and may not be maintained.

Description
This field contains the full description of the User Group.

This field is display only and may not be maintained.

Search Profile
This area is used to limit the contents of the pop up to a nominated range.

Enter an Abbreviation or a Description (or part thereof) and press Search to retrieve specific User Groups.

For example entering *Rates* in the Description field and pressing Search would reduce the list to only those User Groups with the word Rates anywhere in the description.

Setting and Automating Log On

There are four settings in the SetL.asn assignment file that control the menu log on process:

- Logon
- PasswordIsUser
- AutoLogon
- LockOut

A setting is changed by editing its line in the SetL.asn file. If a setting is not present, then it defaults appropriately.

Note that the "PasswordIsUser" is a new setting as at Release 2.06. The SetL.asn is a file that can be found in the working directory of each environment (for example, in Training and Production).

Typically the settings will have the following values:

- Logon=Local
- PasswordIsUser=0
- AutoLogon=0
- LockOut=0

These example settings indicate that:

- The User field of the log on form should be automatically defaulted to the current operating system user name. (Logon=Local)
- The password should not be automatically defaulted to the user name. (PasswordIsUser=0)
- The logon should not be performed automatically. (AutoLogon=0)
- The users should not be locked out of the system. (LockOut=0)

Logon

This setting controls how the user and possibly password are automatically obtained. There are five available values:

- *User* – (default) the user must manually enter the user and password, they are not automatically obtained.

- *Uniface* – the user and password are automatically obtained from the values configured using the Setup… drop-down menu option. This should not be used as of Release 2.06 because the user and password configured here are no longer stored in the registry, they are stored in the SetNT4.ini or SetW95.ini file which is typically located centrally on a network server.

- *Local* – the user is automatically obtained based on the user currently logged on to the operating system (this uses W32File.dll to call the GetUserName API function available in Windows 95 and Windows NT).

- *LocalAPI* – the user is automatically obtained based on the value of the USERNAME environment variable, or if this is not available, from the NWUSERNAME environment variable (available if Novell Netware is being used as the network operating system).

- *LocalOS* – the user and password are automatically obtained by performing the commands specified on the ObtainUserName and ObtainPassword lines in the SetL.asn file. For example:

```
ObtainUserName1=echo %USERNAME%
ObtainUserName2=echo %NWUSERNAME%
ObtainUserNameFile=C:\UserName.txt

ObtainPassword1=echo %USERNAME%
ObtainPassword2=echo %NWUSERNAME%
ObtainPasswordFile=C:\Password.txt
```

The ObtainUserName1 specifies a command that is automatically performed at a DOS prompt. The output of this command is piped to the file specified by ObtainUserNameFile. This file is then inspected to determine the user. For example:

```
echo %USERNAME%>C:\UserName.txt
```

If the first command fails, then the command specified by ObtainUserName2 is automatically performed. Again, the output of this command is piped to the same file that is then inspected to determine the user. If both commands fail or no commands are specified then an attempt is still made to inspect the specified file for the user.

The equivalent process is performed to determine the password using the commands specified by ObtainPassword1 and ObtainPassword2 and the file specified by ObtainPasswordFile.

PasswordIsUser

Only the *Uniface* setting and the *LocalOS* setting in the previous section have the capability to default the password. When using the other settings it is sometimes desirable to automatically default a password.

The *PasswordIsUser* setting enables the password to be automatically defaulted to whatever is contained in the user field. If this setting is used in conjunction with “Logon=Uniface” or “Logon=LocalOS” then the password will only be defaulted to the user if the password has not been defaulted to a value already.

The *PasswordIsUser* setting should either have the value 0 (that is, the digit zero) or 1 (that is, the digit one):

- *0* – (default) do not automatically default the password to the text contained in the user field.
- *1* – automatically default the password to the text contained in the user field.

AutoLogon

If a value has been automatically determined for the user and for the password it would then be possible to automatically log on. The *AutoLogon* setting indicates that if both the user and password have been determined then the log on should be automatically attempted (that is, as if the user had clicked the OK button on the log on form).

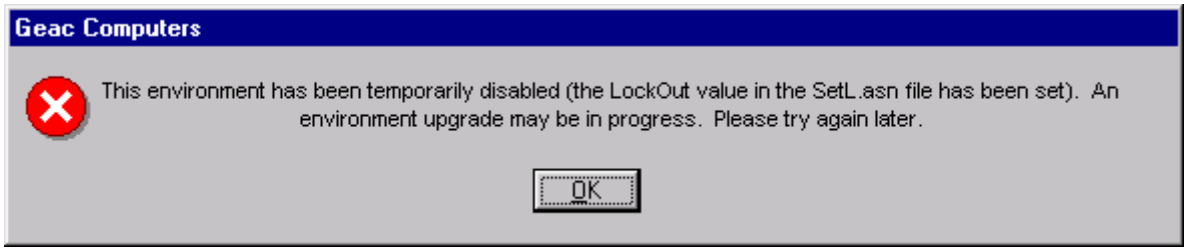
When used in conjunction with the *Action* of *Run* in the user preferences it is possible to force a user to transparently start up a menu option. The user does not see the log on form, nor do they see the menu form.

The *AutoLogon* setting should either have the value 0 (that is, the digit zero) or 1 (that is, the digit one):
- *0* – (default) do not automatically logon.
- *1* – attempt to automatically logon if both the user field and the password field contain text.

LockOut

The LockOut setting is typically used during an upgrade. It prevents users from logging on to a new session. It does not, however, prevent a user from starting up a session and leaving it sitting at the message which indicates that the environment is not available.

The *LockOut* setting should either have the value 0 (that is, the digit zero) or 1 (that is, the digit one):
- *0* – (default) do not lock out users.
- *1* – lock out users by issuing an error message and not allowing the user to log on.



Example SetL.asn Settings

The following text is taken from an actual SetL.asn file. It consists mainly of comments describing the associated settings:

```
; "Logon" indicates how to obtain the user name and password when
; logging on to the menu system.  Note that not all techniques can
; obtain the password.
;
;    User     - rely on the user to manually enter the
;               user name and password (this is the default).
;
;    Uniface  - obtain the Uniface user name and password
;               (as configured using the "Setup..." option
;               from the top left hand corner drop down menu).
;
;    Local    - obtain the local Operating System logon
;               user name from the local Operating System
;               through W32File.dll.
;
;    LocalAPI - obtain the local Operating System logon
;               user name using the local Operating System
;               environment variables USERNAME and NWUSERNAME.
;
```

```
;    LocalOS  - obtain the local Operating System logon
;               user name and password using the commands
;               specified on the "Obtain" lines below (and
;               the Operating System shell specified on the
;               "Shell" lines earlier).
;
; "PasswordIsUser" indicates whether to automatically copy the user
; name to the password field if the user name has been determined
; and the password is not available.
;
;    0 - do not copy the user name to the password (this
;        is the default).
;    1 - automatically copy the user name to the password
;        if the user name is available and the password has
;        not been determined.
;
; "AutoLogon" indicates whether to automatically press the OK button
; when both the user name and password have been determined.
;
;    0 - allow the user to enter the user name and password
;        and then manually press OK (this is the default).
;    1 - automatically activate the OK button on the logon
;        form if the user name and password are determined.
;
; "LockOut" indicates whether the menu system should lock out all
; users (for example, during an environment upgrade).
;
;    0 - users can log on (this is the default).
;    1 - users are locked out.

Logon=Local
PasswordIsUser=0
AutoLogon=0
LockOut=0

ObtainUserName1=echo %USERNAME%
ObtainUserName2=echo %NWUSERNAME%
ObtainUserNameFile=C:\UserName.txt

ObtainPassword1=echo %USERNAME%
ObtainPassword2=echo %NWUSERNAME%
ObtainPasswordFile=C:\Password.txt
```

Parameter Maintenance

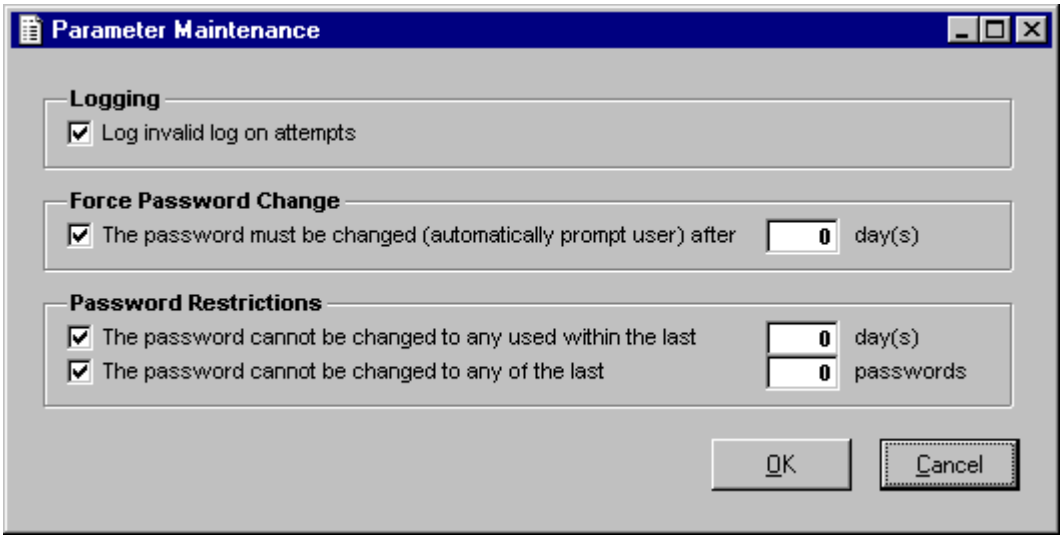
Parameters can be defined to setup further security and control of the signing on to Pathway. Options available are logging of invalid attempts to sign onto Pathway, forcing the change of a Password after a number of days and the password that can be used when the change has been requested.

Parameter Maintenance

The Parameter Maintenance form allows various options to be set regarding the use of Passwords and logons to the Pathway system.

Settings available are:-

- Log invalid log on attempts
- Force Password Change after a number of days
- Password Restrictions



Parameter Maintenance form

Log Invalid Log On Attempts

If this checkbox is ticked on then any attempt at logging on that fails (for example, because the User Id is not recognised, or the password is incorrect) will be logged and can be enquired upon using the Invalid Log On Enquiry Menu.

Force Password Change

If this checkbox is ticked then after the given number of days since last changing their password the User will be prompted to change their password again. They will not be able to log onto Pathway until they change their password.

Force Password Change - Days

If the Force Password Change checkbox has been set on then the Number of Days before the User has to change their password is defined in this field.

Password Restrictions – Used within the last number of days

If this checkbox is ticked on then the user will not be able to change their password to any that they have used within the given number of days defined in the Days field.

Password Restrictions – Used within the last number of days – Days

If the Password Cannot be Changed to Any Used Within the Last Number of Days has been ticked on then the given number of days required is defined in this field.

Password Restrictions – Any of the last number of passwords

If this checkbox is ticked on then the user will not be able to change their password to any of their previously used passwords (up to the given number of previously used passwords defined). For example, if the checkbox is ticked on and the associated number of passwords is set to three, then any of the last three passwords used cannot be specified the next time that the user changes their password.

Password Restrictions – Any of the last number of passwords – passwords

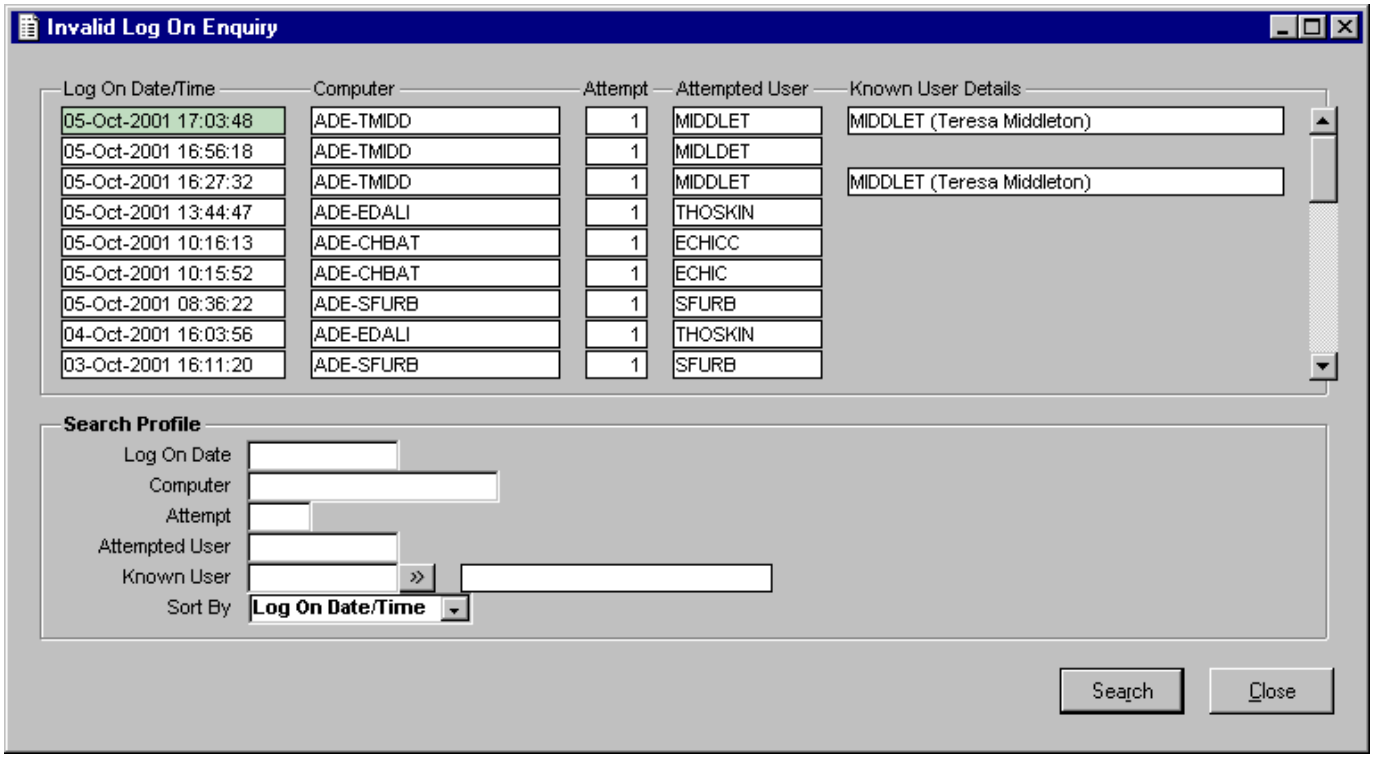
If the Password Cannot be Changed to Any of the Last Number of Passwords checkbox is ticked on then the user will not be able to change their password to any of their previously used passwords (up to the given number of previously used passwords defined in this field). For example, if the checkbox is ticked on and the associated number of passwords is set to three, then any of the last three passwords used cannot be specified the next time that the user changes their password.

Invalid Log On Enquiry

If the Log Invalid Log On Attempts checkbox has been set on within the Parameter Maintenance form then any invalid log on attempts can be viewed via this menu.

Invalid Log On Enquiry

The Invalid Log On Enquiry will display a line for every attempted log on that has been rejected if the Log Invalid Log On Attempts checkbox has been ticked on within the Parameter Maintenance form.



Invalid Log On Enquiry form

Log On Date / Time
This field contains the Date / Time that an Invalid Log On occurred

Computer
The Computer field displays the Id of the computer that was used when the Invalid Log On occurred

Attempt
The Attempt field contains the number of times that and Invalid Log On occurred for the Computer, Attempted User combination.

Attempted User
The Attempted User is the User Id that was entered when the Invalid Log On occurred.

Known User Details
If the User that attempts to sign on is known to Pathway then the User Details will be displayed in this field.

Search Profile – Log On Date
To display only those Invalid Log Ons for a particular date, enter the date into this field and select Search. Any Invalid Log Ons for the date selected will be displayed.

Search Profile - Computer
To display only those Invalid Log Ons for a particular Computer, enter the Computer Id into this field and select Search. Any Invalid Log Ons for that Computer will be displayed. Wildcard searching can be used in this field.

Search Profile - Attempt
To display Invalid Log Ons with multiple Attempts, enter in the number of Attempts to be selected and press Search. Any Invalid Log Ons for the entered Attempt value will be displayed.

Search Profile – Attempted User
To display Invalid Log Ons for an Attempted User, enter in the Attempted User Id and select Search. Any Invalid Log Ons for the Attempted User will be displayed.

Search Profile – Known User

To display Invalid Log Ons for a Known User, enter in the Know User Id and select Search. Any Invalid Logs Ons for the entered Known User will be displayed.

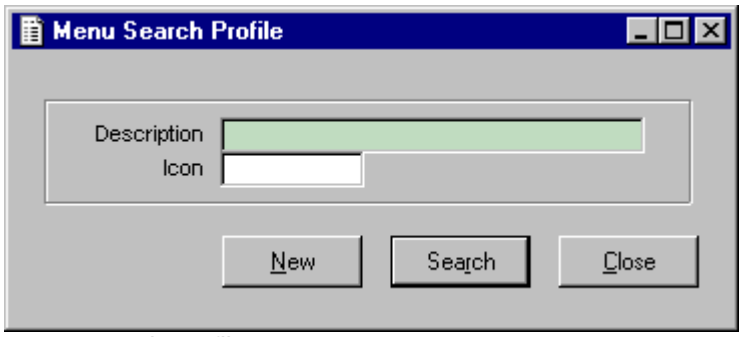
Sort By
The Invalid Log On Enquiry can be sorted in four ways. The default sequence is Log On Date / Time. The sort options available are:-

- Log On Date / Time
- Computer
- Attempt
- User

The Sort By can be used in conjunction with the other Search Profile fields.

Transaction Audit Enquiry

Menu Search Profile Form



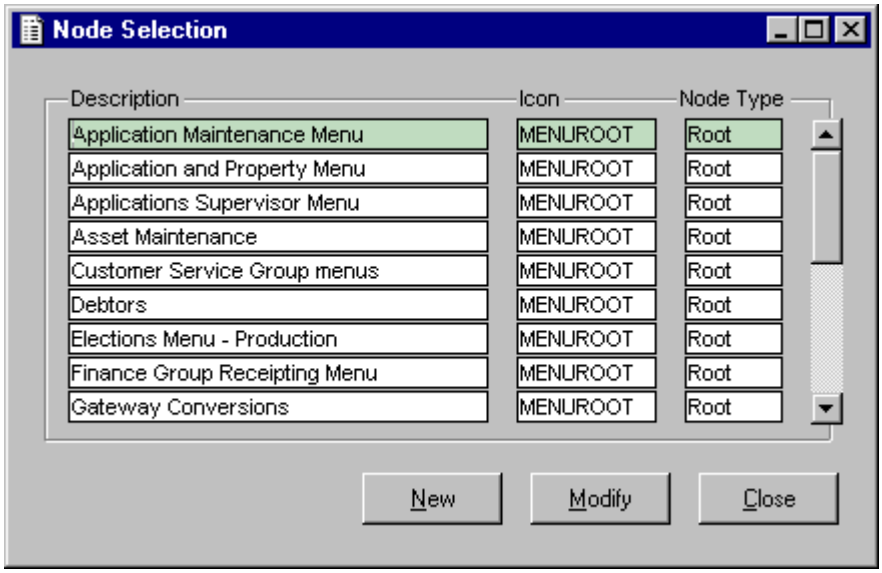
Menu Search Profile Form

Description
Enter the description of a Menu Node on which to conduct a search e.g. Rates. Wildcard searching is available in this field e.g. R*.

Icon
Enter the name of an Icon on which to base your search e.g. MENUROOT. Wildcard searching is available on this field e.g. MEN*.

Node Selection Form

This form allows the creation of new Nodes or the ability to select an existing Node for maintenance.



Node Selection Form

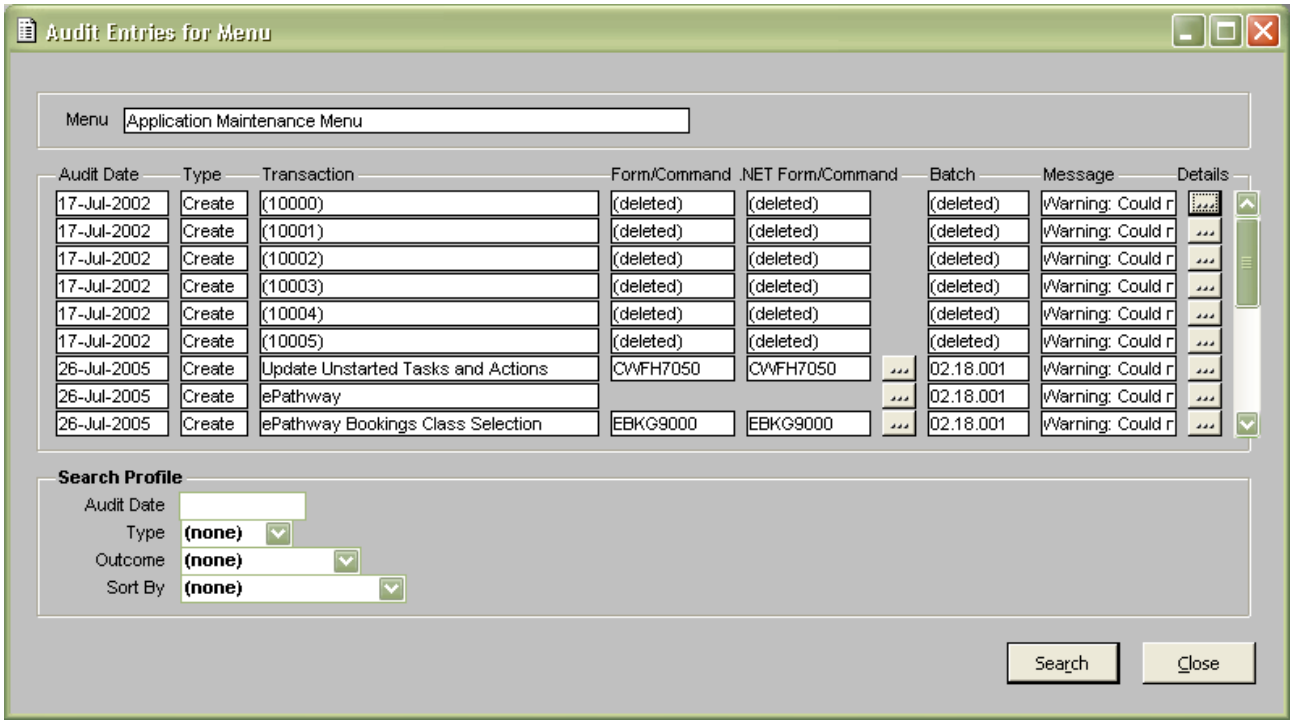
Description
This field displays the names/descriptions of all the Nodes which are available for maintenance.

Icon
This field displays the names of all the Icons associated to Nodes which are available for maintenance.

Node Type
This field displays the Node Type e.g. Root.

Audit Entries for Menu Form

This form displays details of the Audit Entries for the selected Menu.



Audit Entries for Menu form

Menu
This field displays the name of the selected Menu.

Audit Date
This field displays the date on which the transaction took place.

Type
This field displays the Type of Transaction which has taken place e.g. Create, Update or Delete.

Transaction
This field displays object over which the Transaction has taken place, eg. Bulk Parcel Plan Update. The Detail button alongside this field will, when clicked, display the Transaction Details form containing further details of the Transaction.

Form / Command
This field displays the Form or Command which has been affected. The Detail button alongside this field will, when clicked, display the Transaction Details form containing further details of the Transaction.

.NET Form / Command
Used by Pathway 3.

Batch

Message
This field displays details of what action was performed e.g.

“Information: Successfully created the menu node "Z39.50 Server", transaction create Z39.50 Server (2552).”
Or
“Information: Successfully deleted the menu node "Use Attributes", transaction delete Use Attributes (1870).”

Details
Selection of the Detail Button will display the Audit Details form which provides further information on the transaction.

Search Profile - Audit Date
Enter a Date on which to base your search for an Audit Transaction.

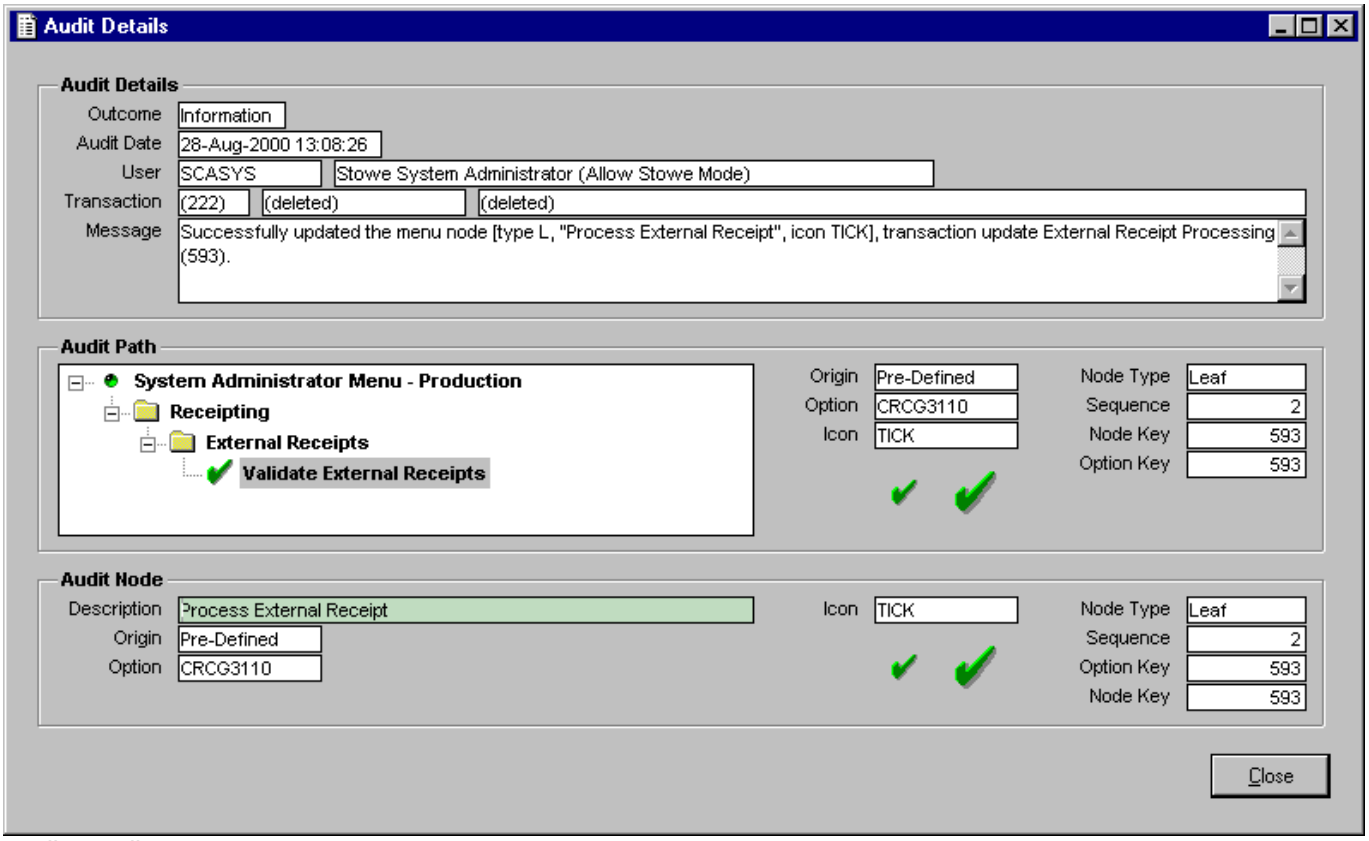
Search Profile - Type
Select a Transaction Type form the dropdown. The available options are:
- (None)
- Create
- Update
- Delete

Search Profile - Outcome
Select an Outcome on which to base your search. This search will look in the ‘Message’ field for the selected details contained in the message. The available options are:
- (None)
- Information
- Not Information
- Warning
- Error
- Fatal

Search Profile - Sort By
This field allows the user to nominate a search order for the display of Transactions. The options available from the dropdown are as follows:
- (None)
- Audit date
- Type
- Transaction
- Form or Command
- Batch
- Outcome
- Message

Audit Details Form

This form displays detailed audit information about a particular transaction.



Audit Details Form

Outcome
This field displays the Outcome as displayed on the Audit Entries for Menu form.

Audit Date
This field displays the Date and Time on which the Audit was taken.

User
These fields display the User who was signed on at the time of the Transaction.

Transaction
These fields display the Transaction Type (e.g. Delete), the Date and Time on which the Transaction took place and the menu path.

Message
This field displays the system message for the Transaction.

Audit Path
This field displays the Audit Path in a hierarchical view. Each menu option may be selected and expanded if appropriate. The details in the adjacent fields will change depending on which menu option is selected at the time.

Origin

Option
This field displays the form or command which is used for the selected menu option.

Icon

This field displays the name of the Icon (e.g. CHKLIST1) used for the selected Menu Option. The Icon Image will display below the field, e.g.

Node Type
This field displays the Node Type (e.g. Leaf) for the selected Menu Option.

Sequence

Node Key

Option Key

Audit Node - Description

Audit Node - Origin

Audit Node - Option

Audit Node - Icon

Audit Node - Node Type

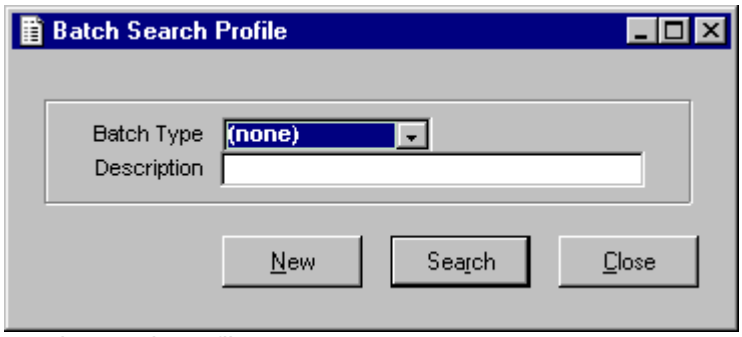
Audit Node - Sequence

Audit Node - Option Key

Audit Node - Node Key

Transaction Maintenance

Batch Search Profile Form



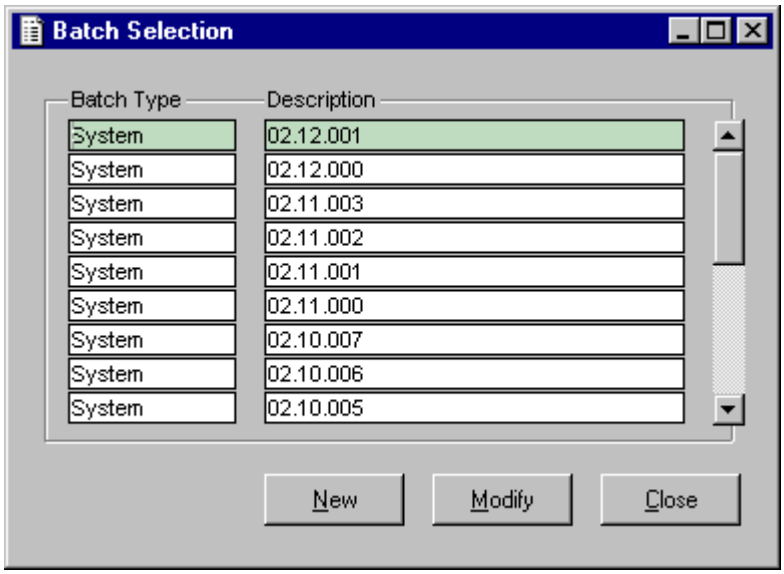
Batch Search Profile Form

Batch Type
This field allows the user to select a Batch Type on which to base a search. The options available from the Pop Up are as follows:

- (None)
- System
- Pre-Defined
- User Defined

Description
This field allows the user to enter a Batch Type Description on which to base a search.

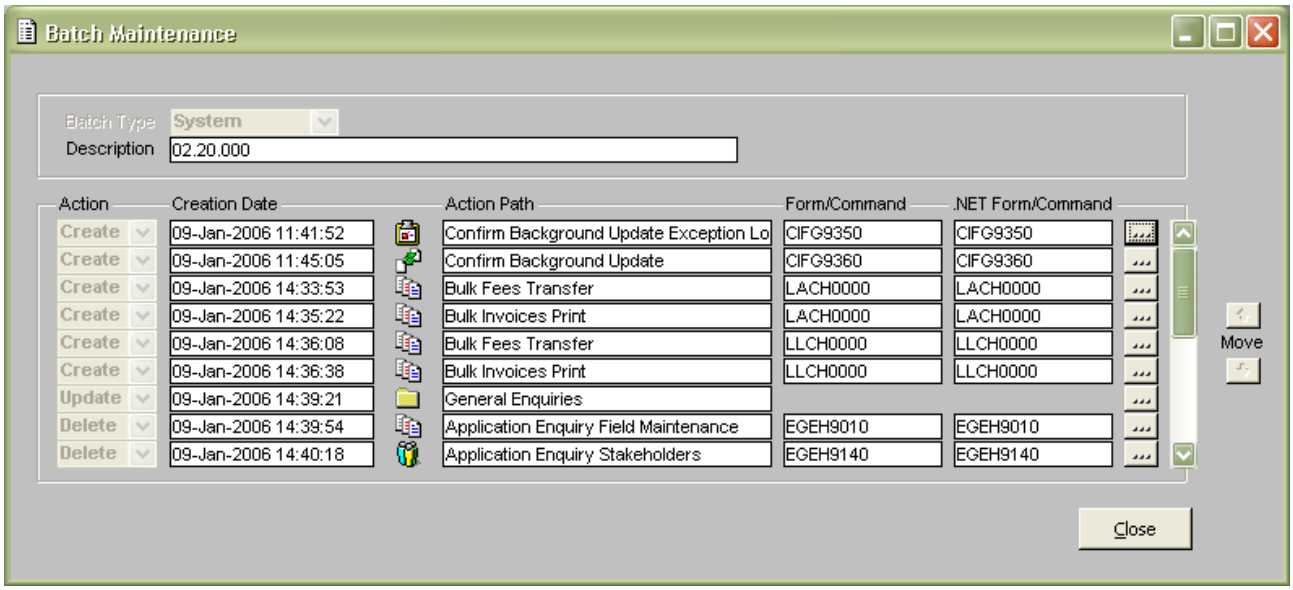
Batch Selection Form



Batch Selection Form

Batch Type / Description
These fields display the Batch Types available for selection. Select the New Button to create a new Batch Type or by focusing on an occurrence and selecting the Modify button the user may maintain an existing Batch Type.

Batch Maintenance Form



Batch Maintenance Form

Batch Type / Description
This field displays the Batch Type selected in the previous form. This field is not maintainable.

Action
This field displays the Action taken. This field is not maintainable.

Creation Date
This field displays the date and Time on which the Action was taken. This field is not maintainable.

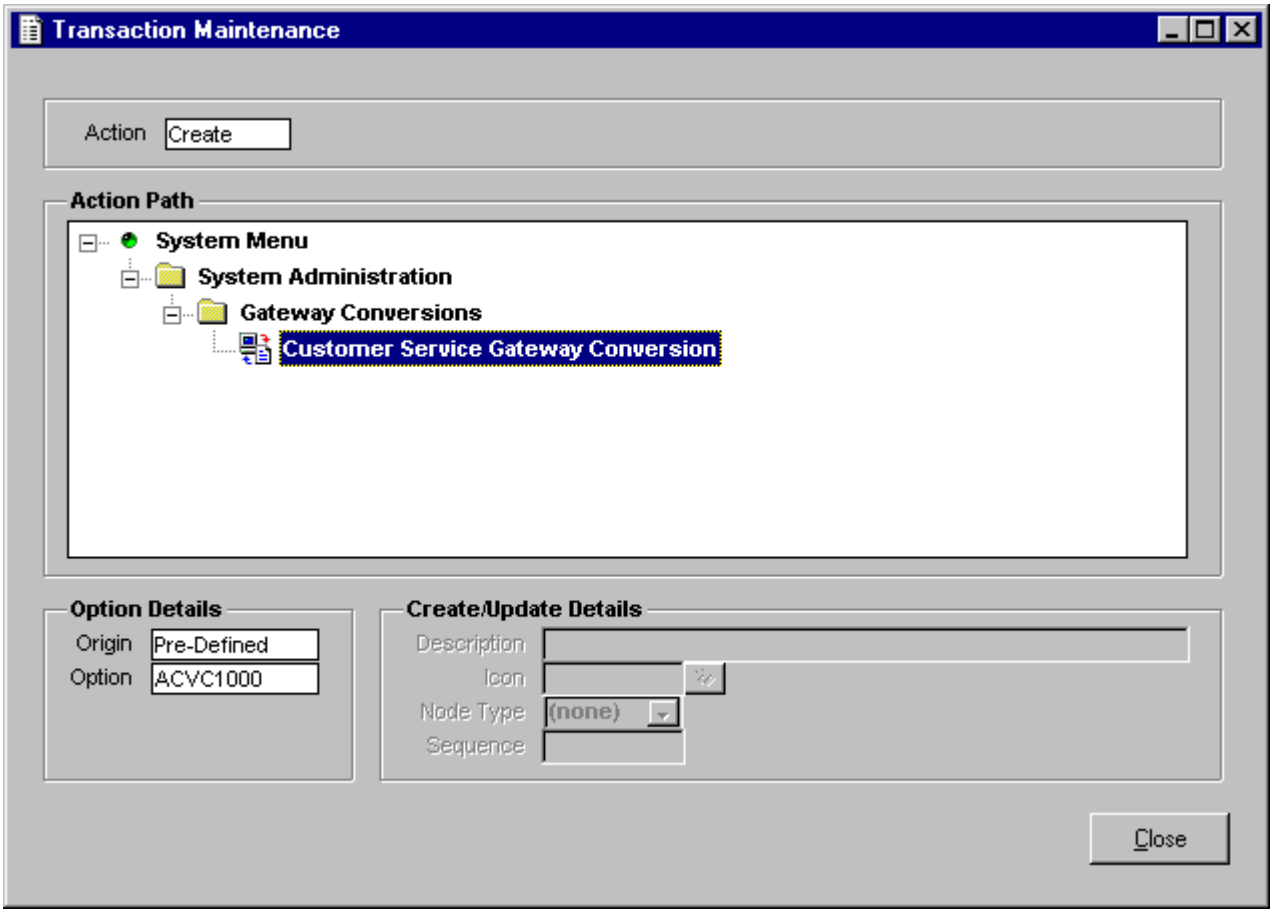
Action Path
This field displays the final step along the menu path. This path can be viewed in more detail by clicking the detail button alongside the Form or Command field. This field is not maintainable.

Form / Command
This field displays the Form or Command used by the Action.

.NET Form / Command
Used by Pathway 3.

Detail Button
Selecting the Detail Button will display the Transaction Maintenance form where details may be maintained if the user has authority.

Transaction Maintenance Form



Transaction Maintenance Form

Action

Action Path

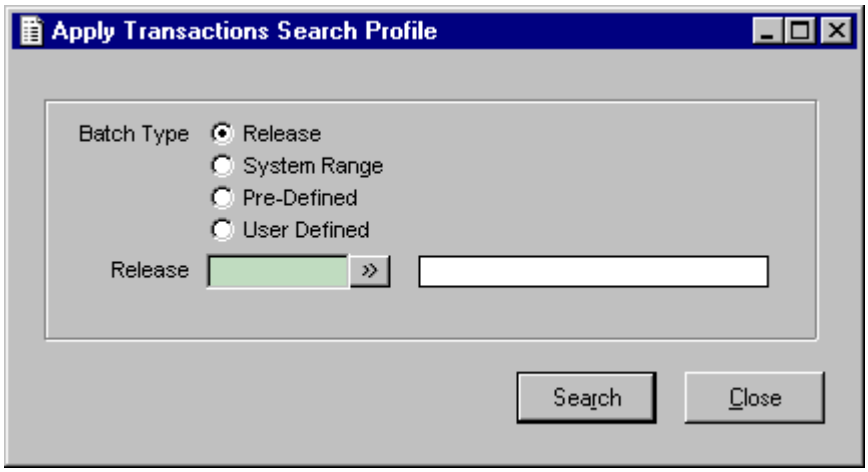
Option Details - Origin

Option Details - Option

Create/Update Details

Transaction Processor

Apply Transactions Search Profile

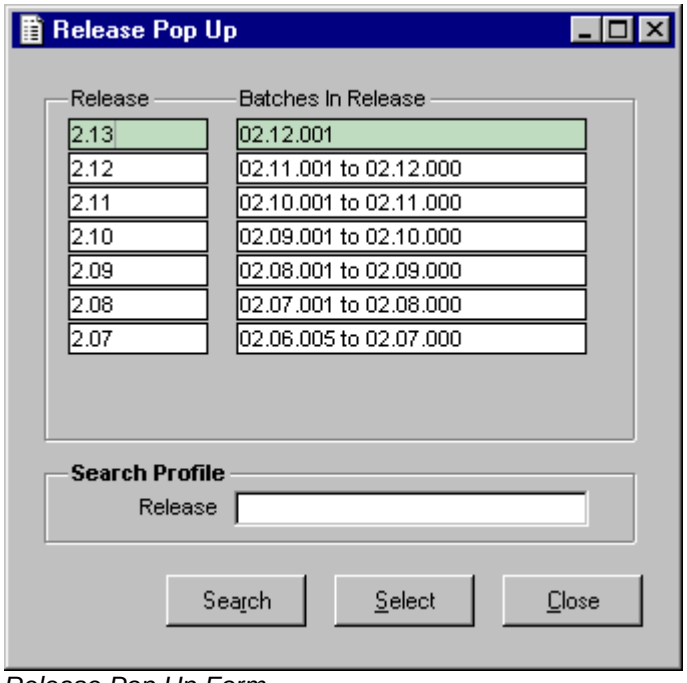


Apply Transactions Search Profile Form

Batch Type

Release

Release Pop Up Form



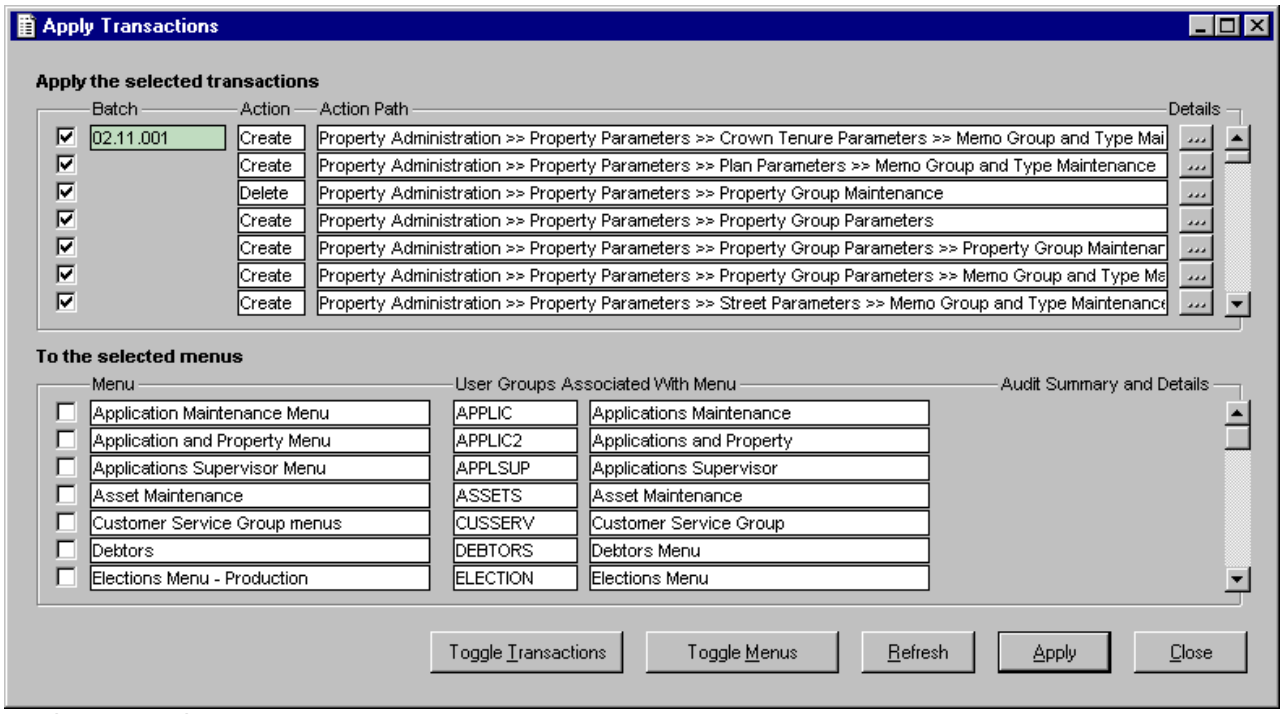
Release Pop Up Form

Release

Batches in Release

Search Profile - Release

Apply Transactions Form



Apply Transactions Form

Apply the Selected Transactions - Apply Flag

Apply the Selected Transactions - Batch

Apply the Selected Transactions - Action

Apply the Selected Transactions - Action Path

Apply the Selected Transactions - Details

To the Selected Menus - Apply Flag

To the Selected Menus - Menu

To the Selected Menus - User Groups Associated With Menu

To the Selected Menus - User Groups Detail Button

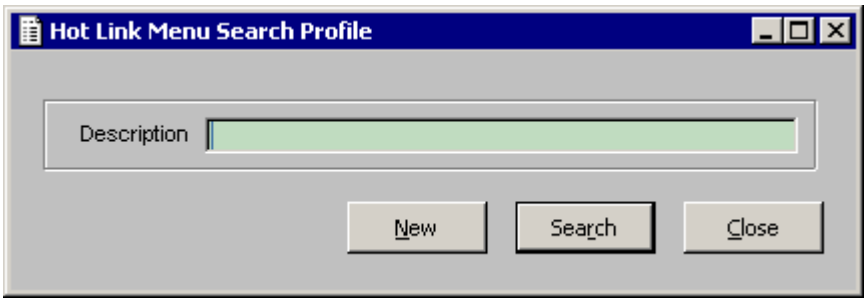
To the Selected Menus - Audit Summary and Details

Toggle Transactions Button

Toggle Menus Button

Hot Link Menu Maintenance

Hot Link Menu Search Profile



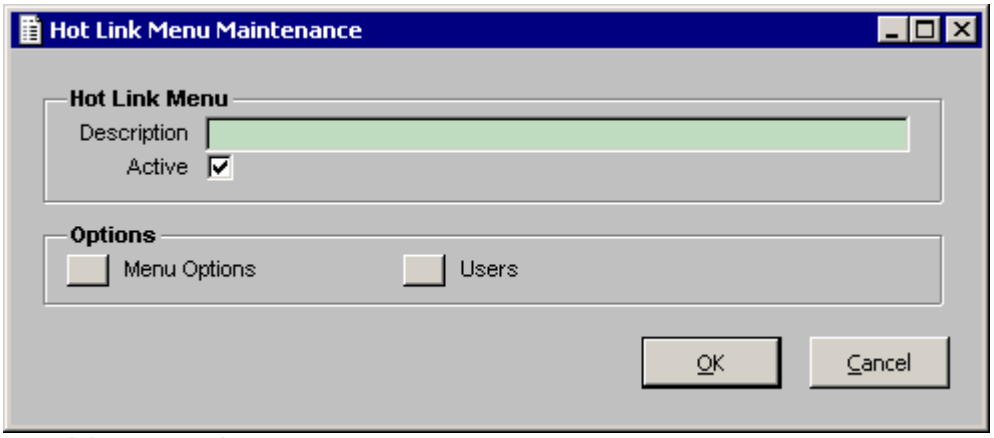
Hot Link Menu Search Profile Form

Description
Use the Description field to enter a full or partial Hot Link Menu Description to allow a search for an existing Hot Link Menu. To create a New Hot Link Menu, click on the New button.

Click on the New Button will take you to the Hot Link Menu Maintenance form.

Hot Link Menu Maintenance form

This Form will allow for the Creation of a New Hot Link Menu and the association of Menu Items and Users.



Hot Link Menu Maintenance Form

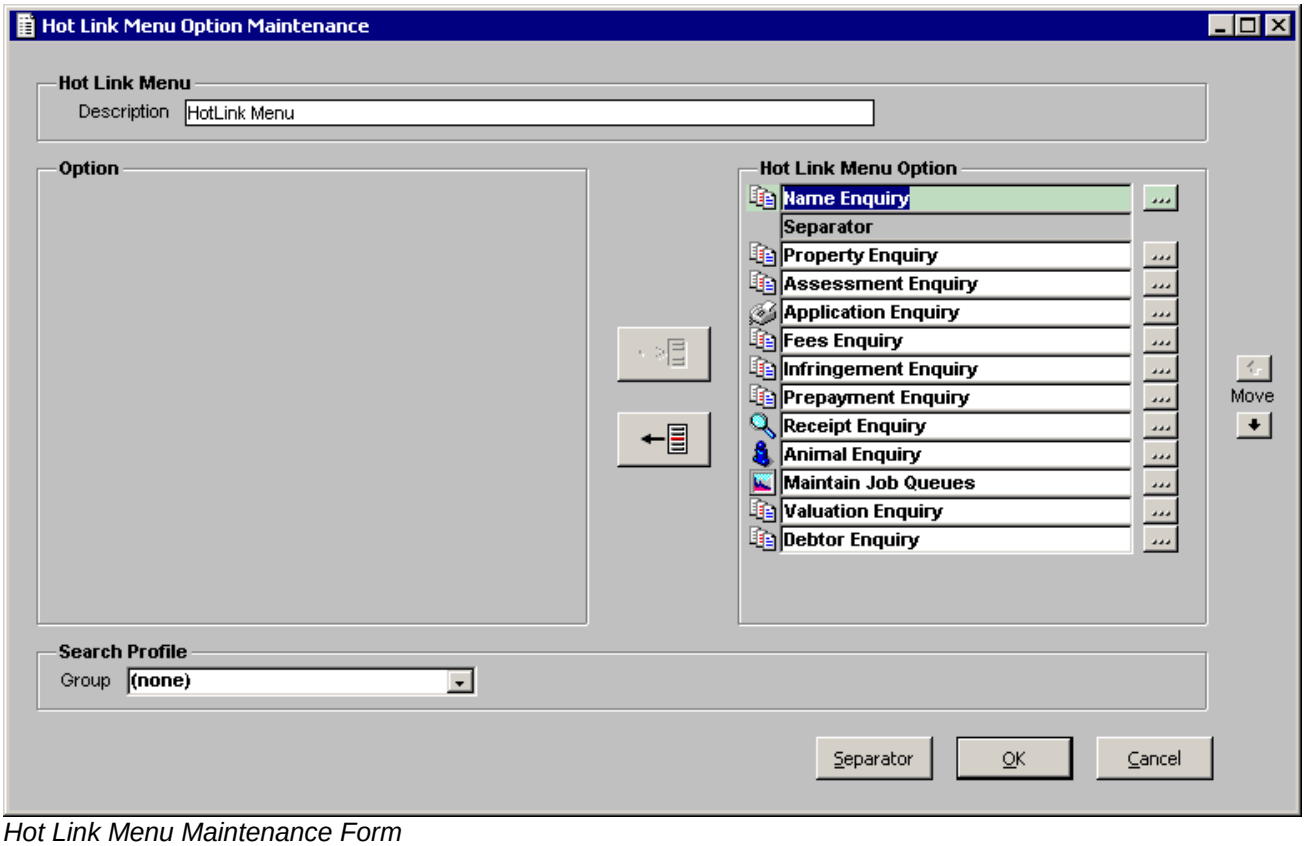
Description
Enter the Description for the New Hot Link Menu.

Active

The Active checkbox will be checked on by default to ensure any newly created Menus are available for use. Should you wish to de-activate a Hot Link Menu, please check the Active checkbox off. The Hot Link Menu will then be unavailable for selection within Pathway.

Hot Link Menu Option Maintenance form

Click on the Menu Options Button to be taken to the Hot Link Menu Option Maintenance Form. This form will allow you to tailor the Menu Options available from the Hot Link Menu.



Hot Link Menu Maintenance Form

This Form allows for the tailoring of the Menu options that will be available to the Hot Link Menu. Use the search profile at the bottom of the screen to scroll through and select a Pathway Menu to select options from. The system menu will give you all available Pathway options for selection. The menu will appear in the left of screen just as it does from a Pathway Main Menu, functionally it is the same so apply normal Pathway navigation to drill down and scroll through the menu to locate the required menu option to move across.

Once the option has been located and move to the Hot Link Menu Option area, the Menu Option description will appear in a user maintainable form. The name of this Menu Option can then be altered to suit. Those Menu Items that are moved to the Hot Link Menu Options area will be the options available when the Hot Link Menu is invoked by the user.

There is no limit to the number of options that may be assigned, however this will effect how functional the resulting Menu is.

Hot Link Menu
This will display the Description of the Hotlink Menu currently being maintained.

Option
The available options as defined from the selected Menu will be displayed here. If there is no Menu selected then this area will appear empty. Use the Group Dropdown in the Search profile at the bottom of the form to

locate and select the required Menu. Once this has been performed, the associated Menu Options will be displayed.

Hot Link Menu Option
This will display the name of the Menu Items that have been selected for inclusion in the Hot Link Menu

Separator
The Separator will insert a new field called Separator. Upon the display of the Hot Link Menu, the separator will be interpreted as a line, thus separating the Menu options. This could be used to separate Maintenance and Enquiry options on the Menu, or modules for example.

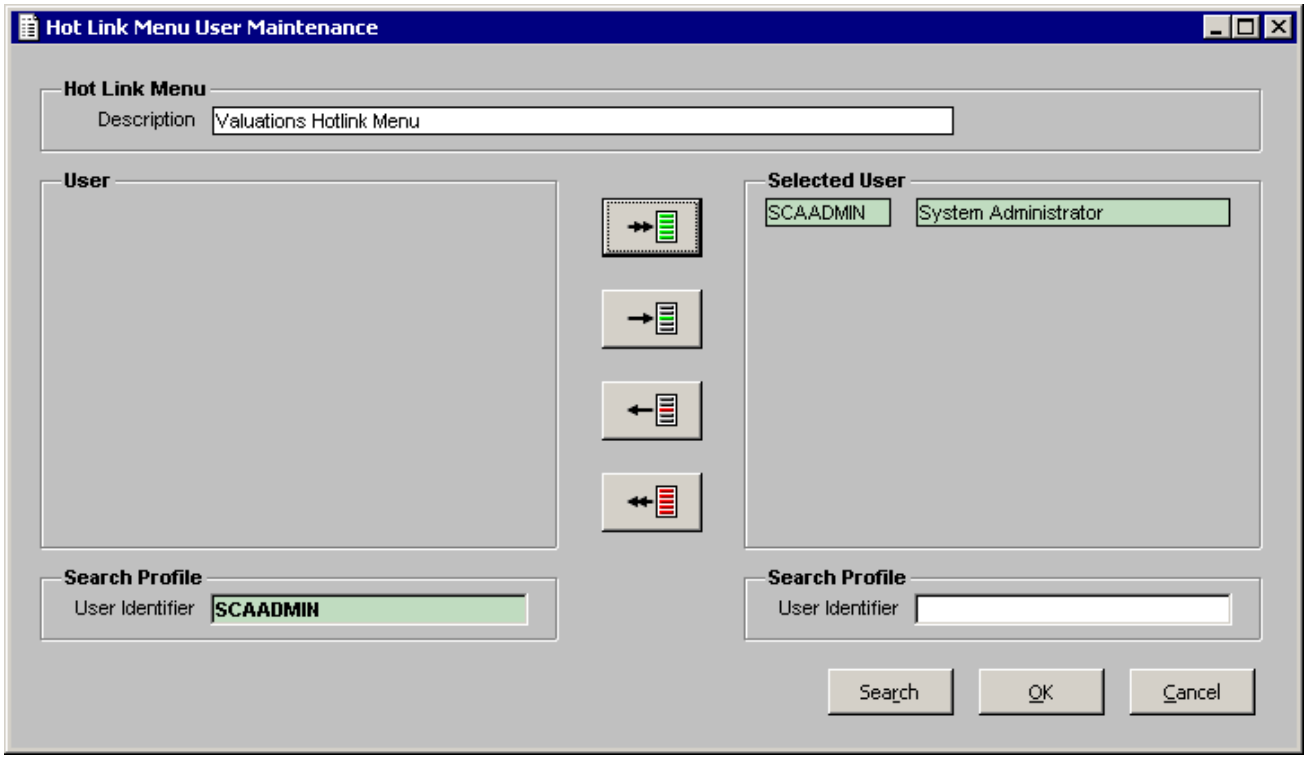
The separator line will be inserted AFTER the current highlighted menu item.

Search Profile

Group
Use the Group Dropdown in the Search profile at the bottom of the form to locate and select the required Menu. Once this has been performed, the associated Menu Options will be displayed in the Option area above.

Users
Use this function to assign users to the Hot Link Menu.

Hot Link Menu User Maintenance form



Hot Link Menu User Maintenance Form

Hot Link Menu
This will display the description for the selected Hot Link Menu that is currently being modified.

User
This will display the list of current Pathway Users. Use the Scroll Bar and Search profile at the bottom of screen to locate the required Users that will be assigned to this Hot Link Menu.

Selected User
This area will display the User ID and description for those Users that have been assigned to this Hot Link Menu. A user may only be assigned to one Hot Link Menu at any one time. They may however be moved between Menus as required.

Search Profile

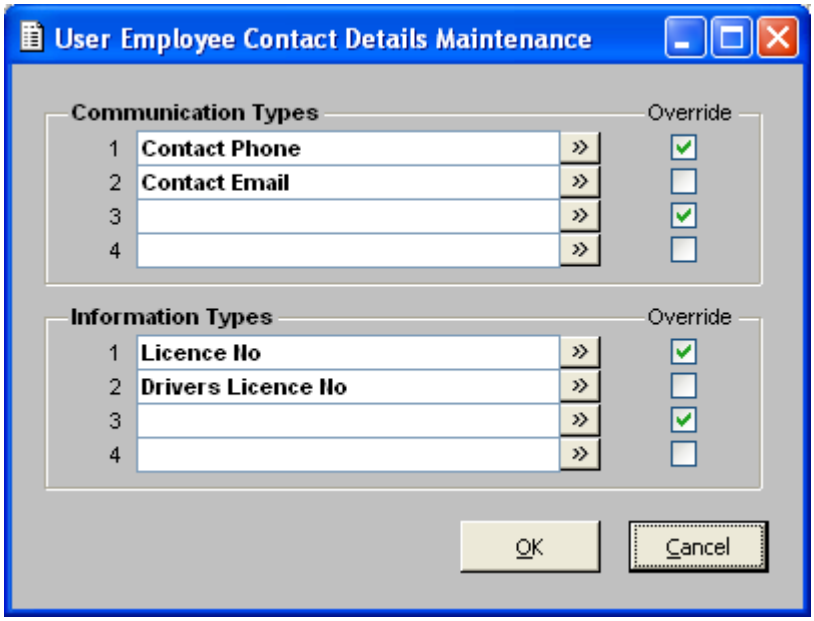
User Identifier
A User Identifier may be entered here to allow a more efficient method of locating the required user. This is by User ID only

User Employee Contact Details

This is an Authorised Function allowing a Personal Name from the Name and Address module to be assigned to a User Id from the Core Menu module, creating an Employee Name Role in the Name and Address module for the User. An Employee User may be associated with a Word Processing module Document Request, causing Communication Type data and Informatiopn Type data for the Employee to be made available for insertion in the document.

User Employee Contact Details Maintenance

The menu option *System Administration* ► *Menu* ► *User Employee Contact Details* enables Name and Address Communication Types and Information Types to be defined as the default contact details types to be used when extracting data for use in a document. Up to four Communication Types and up to four Information Types may be defined:-



User Employee Contact Details Maintenance

Communication Types

A Communication Type may be keyed in or selected from the pop up. Only Communication Types applicable to Personal Name or Person & Company will display for selection. Duplicates are not permitted.

Note:
- Checking the Override flag ON defines a default Communication Type for all Users but allows it to be overridden for an individual User.

- Checking the Override flag OFF defines a default Communication Type for all Users but prevents it from being overridden for an individual User.

- Checking the Override Flag ON without specifying a Communication Type allows a Communication Type to be defined for an individual User without defining a default Communication Type applicable to all Users

- Leaving the Override flag OFF without selecting a Communication Type disables the Communication Type althogether.

Information Types

An Information Type may be keyed in or selected from the pop up. Only Information Types applicable to Personal Name or Person & Company will display for selection. Duplicates are not permitted. The Active flag defines a default Information Type for all Users but allows it to be overridden for an individual User.

Note:
- Checking the Override flag ON defines a default Information Type for all Users but allows it to be overridden for an individual User.

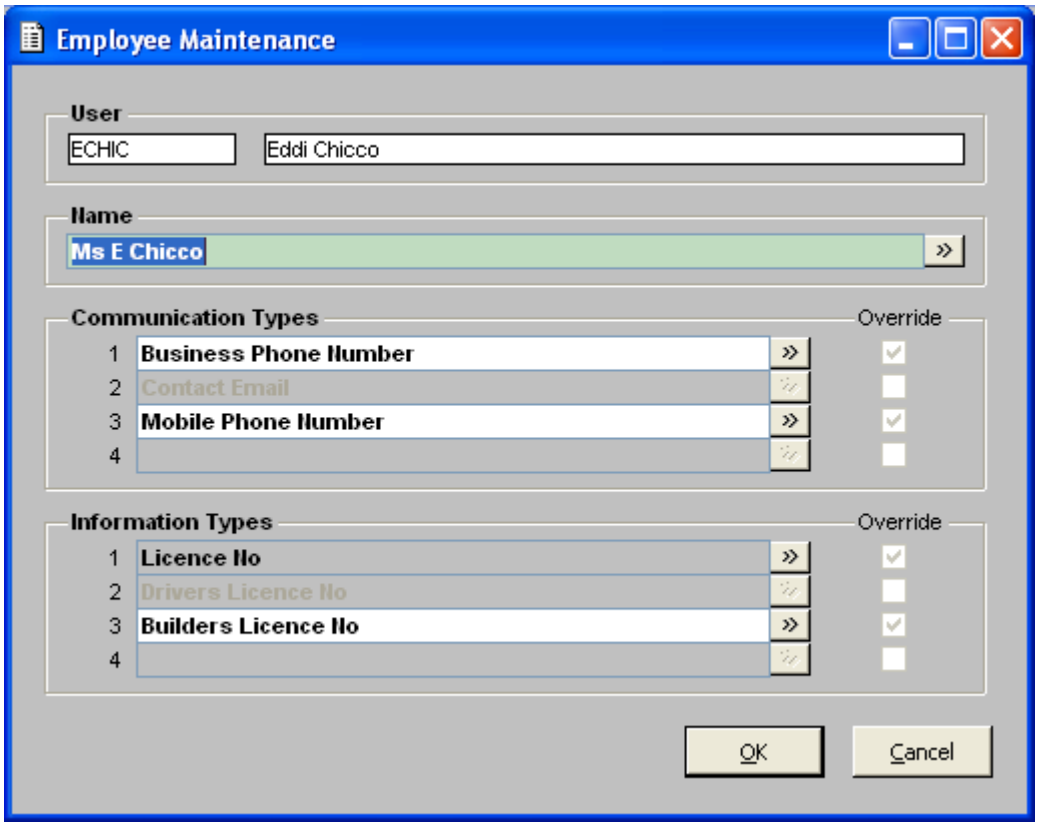
- Checking the Override flag OFF defines a default Information Type for all Users but prevents it from being overridden for an individual User.

- Checking the Override Flag ON without specifying an Information Type allows an Information Type to be defined for an individual User without defining a default Information Type applicable to all Users

- Leaving the Override flag OFF without selecting an Information Type disables the Information Type althogether.

Employee Maintenance

The Employee Maintenance form displays when the Employee detail button is selected for a User on the User Maintenance form. It allows a Name to be associated with a User Id as well as Communication and Information Types. The Communication and Information Types which are available on this form are determined at the 'User Employee Contact Details Maintenance' level accessed via System Administration>>Menu>>User Employee Contact Details.



Employee Maintenance form

User

These fields display the Name details of the selected User.

Name

Pressing the Name Pop Up displays the Employee – Name Search Profile where a Personal Name only may be selected. Once selected, the Name will default back into the Name field on this form.

Communication Types

The User may select/key in Communication Types in fields which have been set up to allow this. Communication Types which contain a default but are able to be overridden will display in bold on a grey background. Once they have been overridden the background will turn to white to indicate the default has been overridden. Communication Types which cannot be overridden will be dimmed and unavailable. Duplicates are not permitted. The Override flag is not maintainable on this form but indicates if an override is in allowed or is in place.

Information Types

The User may select/key in Information Types in fields which have been set up to allow this. Information Types which contain a default but are able to be overridden will display in bold on a grey background. Once they have been overridden the background will turn to white to indicate the default has been overridden. Information Types which cannot be overridden will be dimmed and unavailable. Duplicates are not permitted. The Override flag is not maintainable on this form but indicates if an override is in allowed or is in place.