Infor ERP System i A3

# System Manager Application Manager

# Product Guide

# Frontispiece



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# Chapter 1 - Application Manager Basics

# Prerequisites

Before starting, you should be familiar with your PC or terminal and its controls.

The function of certain keys on the keyboard depends on whether you are using a PC client or an iSeries terminal. These keys are:

| iSeries | Windows |
|---|---|
| Shift - Roll Up Shift - Roll Down | Page Down Page Up |
| Function keys F1 - F24 displayed | Function keys F1 - F12 displayed F13 - F24 accessed by using Shift key to increment the Function Key value by 12, for example, Shift +F1=F13. |
| Field Exit | Right Ctrl Key or + on Number Pad (but can change depending on key mapping). |
| Reset | Left Ctrl key |

You should also know how to sign on and off your server, and have a good knowledge of the server-based software in the following areas:

- Using and navigating screens
- Using Help
- Entering control language commands and procedure commands
- Calling utilities
- Responding to messages

# System Conventions

### Version and Environment

Do not confuse version with environment: occasionally the term 'version' has been used when 'environment' is what is really meant. For example, A1 describes release 1.0 of the software. All the standard applications within this release will have blank application versions to identify the application. This should more properly be described as blank environments.

For example, you can have a live environment, usually the default environment and a test environment for your financial application. The environment code differentiates between these environments and this, together with the drop-through rules, determines which version of our application is used.

A module is identified by a code in three sections:

| | |
|---|---|
| Application Code | For example, GL - General Ledger |
| Version (Environment) | For example, TST - Test Version, typically for use in environment TST |
| Release | For example, 01 - Version 1 |
| | Note: Modules are shipped with a blank environment code. |

### Selecting Menu Options

There are four ways of selecting options on all menus and submenus used by System Manager, although only one is available through Workspace. From the System Manager Selection or Command line you can:

- Enter an option number and then select OK.

  Note: The 3 methods below can only be used in Green on Black (GOB) sessions.

- Move the action bar to the required option and select OK. The action bar can be moved using either the Page Up or Page Down key.
- Enter \ and then the option number (for example, \3) on the command line below the menu options, then select OK. If the option leads to a submenu, and you know the number of the option you want to select from that submenu, you can enter \n\n.
- Enter \ and then a single character code on the command line below the menu options and then select OK. The code is one of the following single character module IDs:

  - \a Application Manager
  - \c Administration Functions

- \h Housekeeping
- \m Machine Manager
- \n Network Manager

Note: You can go directly to a menu option by adding \number. For example, use \a\2 to go to Application Manager Option 2.

# System Manager

System Manager is the generic name that includes the following modules:

- Application Manager
- Machine Manager
- Housekeeping
- Network Manager
- Administration Functions

To access the System Manager Main Menu, enter STRWFI on a command line.

# Application Manager

Application Manager provides you with advanced system integration and a security-conscious menu system.

You can use Application Manager to:

- Change between application areas more easily
- Create your own menus
- Specify security from company level down to individual tasks
- Find out which terminal is processing which job
- Add tailor-made functions to your menus
- Control the job queues and print queues for submitted jobs
- Control the multi-language environment for all standard applications

Note: Set user registration with the user profiles in Administration Functions.

## Menus

You can create your own menus. Application Manager is totally flexible in its approach to the building of menus, so you can control their accessibility and content.

You also control the layout. You can use most of the field-level display attributes (for example, highlighting, underlining, and colour), and the menus are in no way restricted as, for example, one or two columns.

The function keys are soft-coded, so you can associate any function key with any action.

## Access Control

You control which companies (for multi-company environments), which applications, and which functions within applications, a user can access. The user who tries to enter such a function without authorisation will be prevented by the software.

This is achieved in two areas:

- At Operation level

You select the menus, menu options (and therefore application tasks) and functions to which the user is authorised. For example, you can set up a user's profile to allow access to all enquiry menus and all enquiry tasks in a selected application, but no maintenance or processing.

- At Company level

You select the specific companies to which the user is allowed access in an application.

The actual setting of this access control is mainly performed in Administration Functions. See the Administration Functions product guide for more information.

## Tasks

Each activity carried out under the control of Application Manager is called a task. The task tells the system which program to call to perform an activity, and whether it is a batch (submitted) or an interactive task.

For example, a menu option can invoke a task, and when a user takes the menu option, the system refers to that task to find out which program to run.

You might find it useful to think of an application as a set of tasks logically grouped together. For example, Accounts Receivable, Sales Order Processing, and so on. To use the tasks in an application, a user must be granted authority to them.

A single menu can feature tasks from across many applications and thus provide a seamless user environment.

## User Profile

In addition to their server user profile, each user has a user profile for Application Manager. This controls:

- The default Sign On Menu
- In a multi-company environment, the default company
- The default job and print queues
  - These can be overridden at company and task level. For example, you can print invoices on a dedicated printer, while other printouts go to the default printer.
- Whether the user is authorised to enter commands
- Whether an alternative language is used
- The user is authorised to the roles that they are allowed to perform
- The user is assigned to a default role

## Role Profile

This controls:

- The default Sign On Menu

- The menus and tasks that the role is authorised to perform
- The users that are authorised to perform the role

## Library Lists

A set of standard library list files is supplied with the system. These library lists are set up to cater for all standard usage of the applications.

However, you can change these to allow for modifications to your own applications.

Each application has its own set of library lists. You can set up library lists for test or training environments, to eliminate any impact on live data.

## Application Profile

Each application must have its own application profile, defining its version and name. The application profile controls the default library list used, and whether or not a specific application day-end program is required.

## Management and Control

Application Manager provides automatic error logging.

If an error occurs during the running of an application, the system displays a message to inform you of an abnormal termination. In addition to this, the system writes an error record to its files. You can enquire on, or print, this file to determine the cause of the error and, if necessary, send it to your software support organisation.

You can use Application Manager to ensure the exclusive use of any application. This is known as allocating an application. If you need to copy files to offline storage, for example, you need to know that no-one is using those files. Application Manager tells you who is signed on to the application, and enables you to send a message to them, telling them to sign off the system.

Any user attempting to sign on to an allocated application receives a message telling them that the application is not available.

## Advanced Menu Functions

You can use menus in expert mode.

You can enter / followed by the menu code to go directly to that menu, for example /INM to go to the Inventory Management Maintenance menu. You can enter the specific menu option number to directly access the task required, for example 1/INM for Inventory Management Descriptions.

If you cannot find a specific task on the menus, you can use the search facility. You can enter a word from the task's description, and a list of tasks that contain the word, and to which you are authorised, is displayed.

As a refinement to this search facility, you can set up synonyms for the search. You can associate the word item, for example, with the words part, product, and assembly. Whichever word you choose to search on, the search facility will pick up all its synonyms. This is transparent to the user.

For role processing, you can change roles using the CHGROL command. This command prompts with a list of the user's authorised roles. If the role code is known, then the command can be entered as CHGROL role code, for example CHGROL INVCLERK, without prompting.

# Application Manager Main Menu

If you use STRWFI, select **Application Manager** from the Main menu and then select **OK**. In a GOB session you can also use **Page Up** to move the action bar so that Application Manager is highlighted, and then press **Enter**.

You can also use the command STRWFIAM from a command line or in Workspace to access the Application Manager Main menu.


## Functions

### Messages (F6)

Use this to display all messages for the user.

### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

### View Jobs (F14)

Use this to display all jobs for the user.

### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

Enter the option you require and then select **OK**.

# Chapter 2 - Maintain Environments

# Introduction

In early versions of Application Manager, environments have not been specifically created. They have simply existed by virtue of having new applications, menus and tasks created with an environment code (version) that has not hitherto been used.

In Application Manager, there is a possibility of creating environments through the Application Manager menu. This works in conjunction with the Exclusivity flag in System Properties (see the Administration Functions product guide).

If you have the Exclusivity flag set to **Environment**, task exclusivity will only apply across a particular environment. This environment can be set up using this option.

Note: All environments belonging to an environment group should share the same application database libraries.

## Maintain Environment Window

To display this window, select the **Maintain Environment** from the Main menu and then select **OK**.

Use this window to enter the environment code.


### Fields

#### Environment

Enter the three-character code for the environment.

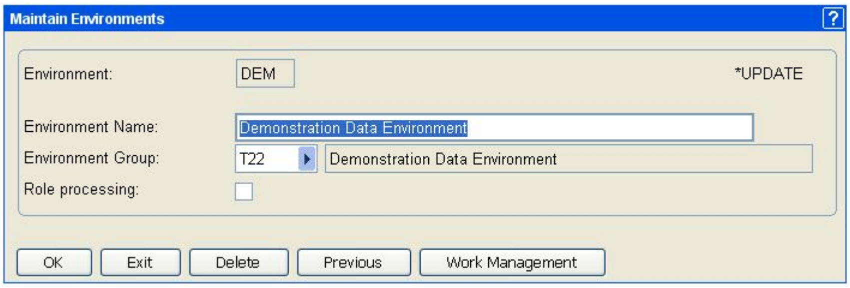
Alternatively, use the prompt facility to select from the Select Environment pop-up.

Enter an environment and then select **OK** to display the Maintain Environment Details window.

# Maintain Environment Details Window

To display this window, enter an environment code and then select **OK** on the Maintain Environment window.

Use this window to add or maintain the details of the environment.




## Fields

### Environment Name

Enter the name of the environment.

### Environment Group

Enter the group to which this environment belongs.

Alternatively, use the prompt facility to select from the Select Environment pop-up.

### Role Processing

Use this checkbox as follows:

Unchecked - If Role Processing is not active in this environment

Checked - If Role Processing is active in this environment

## Functions

### Delete (F11)

Use this to delete the environment. Select **Confirm Deletion (F11)** to confirm the deletion.

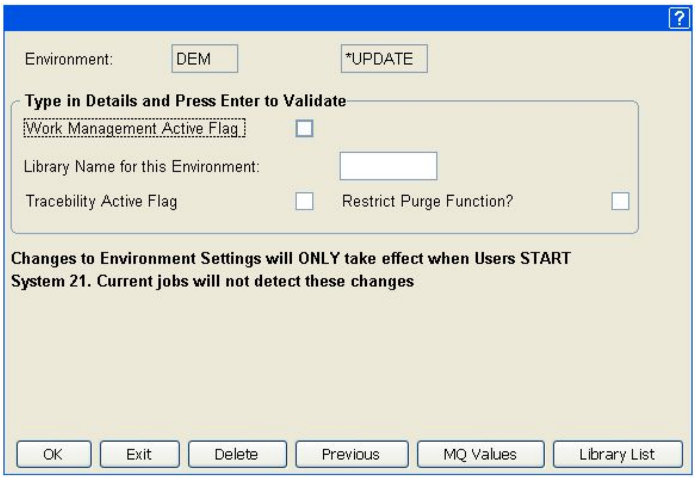
**Work Management (F14)**

Use this to set up Work Management details for the environment on the Maintain Work Management Environment Settings window.

If you want to set up Work Management details, select **Work Management (F14)**. Otherwise, select **OK**.

# Maintain Work Management Environment Settings Window

To display this window, select **Work Management (F14)** on the Maintain Environment Details window.




## Fields

### Work Management Active Flag

Use this checkbox as follows:

Unchecked - If Work Management is not active with this environment

Checked - If Work Management is active with this environment

> Tip: If you want to de-activate an environment, uncheck this field rather than deleting the environment. You can also set environments up in advance by unchecking this field and then checking it when you need to use them.

### Library Name for this Environment

Enter the WM files library that this environment will use.

Every environment you set up must use a different WM files library.

> Note: You can use **Library List (F20)** to define a library list.

### Traceability Active Flag

Use this checkbox as follows:

Unchecked - If traceability is not active

Checked - If traceability is active (the trace is written to file WFP95)

> Note: This field should only be used by technical support staff.

### Restrict Purge Function?

Use this checkbox as follows:

Unchecked - Not to prevent users from deleting data

Checked - To prevent users from running the Transaction Purge task for the selected environment

This prevents the accidental deletion of live data.

## Functions

### MQ Values (F16)

Use this to display the Maintain Work Management MQ Settings window, which allows you to specify the queues and queue manager that the Work Management Engine and the Database Trigger program should use.

### Library List (F20)

Use this to define a library list to use for data determination in this environment. You must define a library list for every active environment, that is, where you **checked** the Work Management Active field.

Note: You do not need to add a Work Management files library, as WM does it for you.

Select **Library List (F20)** to display the Work Management Data Determination Files Library List window.

# Chapter 3 - Maintain Applications

# New Applications

You can create your own applications by combining your own tasks and placing them on menu options. For example, you can create an operator's menu, with options to save libraries, clear output queues and run day-end procedures.

These are the steps involved in creating a new application:

### Application Profile

Firstly, inform Application Manager of the existence of the new application. You must specify the following:

- Application source - a one-character code
- Application ID - a two-character code
- Environment (Version) - a three-character code
- Release - a two-character code

Set this up via the Maintain Application window.

### Library List

For each new application, you must enter a library list code. Create this library list using the Maintain Library Lists option (refer to the Maintain Library Lists section).

### Application Defined Tasks

Specify the tasks which need defining to the application. You can define your own tasks. To define tasks, use the Maintain Tasks option (refer to the Maintain Tasks section).

### Menus

Decide the menu structure that you wish to define. Then use the Maintain Menus option (refer to the Maintain Menus section).

### Companies

If your application is to be company-driven, make sure the companies are defined. Use the Maintain Companies option (refer to the Maintain Company Parameters section of the Administration Functions product guide).

### User Profiles

Finally, authorise users to your new application. You must authorise them to menus (options and functions), tasks and companies. Use the Maintain User Profiles option.

# Maintain Applications

Each software module that runs under Application Manager is known as an application.

In order to establish the required library lists, procedures and menus associated with the application, each application needs an application profile.

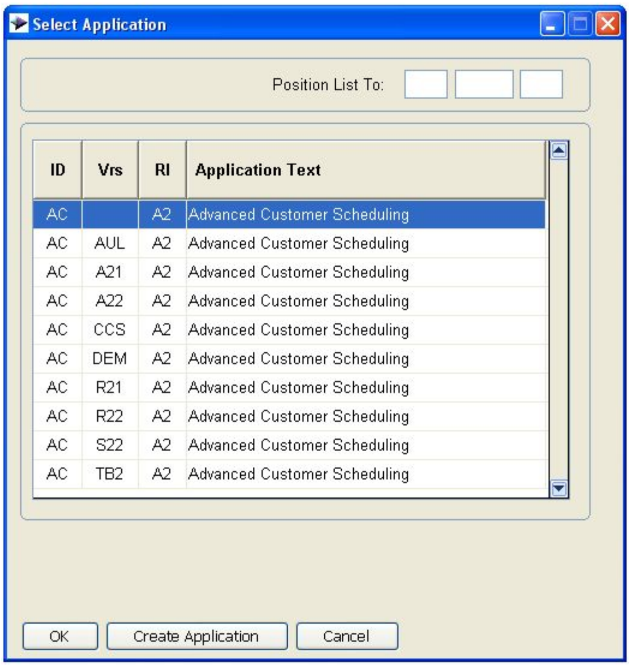
For all System21 Aurora; LX and XA standard applications, the application profile is already set up. It is highly recommended that you do not attempt to change these.

## Select Application Pop-up

To display this pop-up, select **Maintain Applications** from the Main menu and select then **OK**.

This pop-up displays a list of all the applications set up on your system.

Note: If you already selected an application using **Select Application (F22)**, when you select the Maintain Applications option from the Main menu, the Maintain Application window is displayed.




### Fields

#### Position List To

You can enter the application from which you want to start the display. In the three sections you can enter the application ID, version (environment) and release number. You do not have to complete all three sections here.

#### ID

This field displays the two-character identifier for the application.

#### Vrs

This field displays the version (environment) of the application.

#### Rl

This field displays the release level of the application.

#### Application Text

This field displays the Application Manager description of the application.

### Functions

#### Create Application (F8)

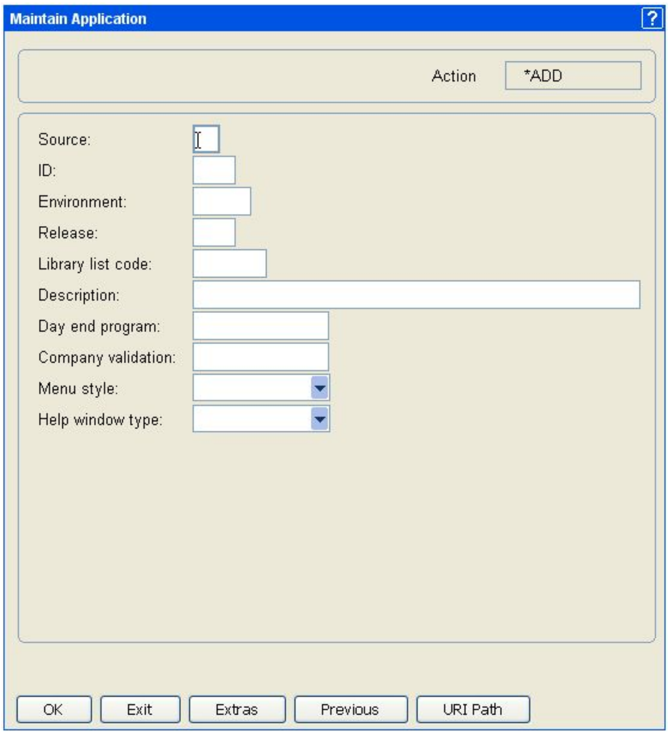
Use this to create a new application profile.

Select an application or select **Create Application (F8)** to display the Maintain Application window.

# Maintain Application Window

To display this window, select an application ID or select **Create Application (F8)** on the Select Application window.

This window differs depending on whether you are creating or amending an application. These differences are highlighted in the text.




## Fields

Note: You can only maintain the Source, ID, Environment (Version) and Release fields if you are creating an application.

### Source

Enter a code to indicate the source of the application.

If you enter a source code of J or O, you must also enter an authorisation code. You can enter any other value as a source code without authorisation checking, but it is recommended that U be used for your own applications.

Note: This field is not displayed if you are amending an existing application.

### ID

Enter the two-character application ID.

Note: This field is not displayed if you are amending an existing application.

### Environment

Enter the environment (version) code for the application. This can be left blank.

> Note: This field is not displayed if you are amending an existing application.

### Release

Enter the release level of the application.

> Note: This field is not displayed if you are amending an existing application.

### Library List Code

Enter the default library list code for this application. The library list defined by this code is established when a user first enters the application, except where a library list code is specified at task level.

### Restrict Maintenance

This is used to denote that the application is being maintained by API. If maintenance of any application related data is attempted then a warning is issued to advise that any changes may be overwritten by future API updates or maintenance is prevented.

0 - Allow maintenance without warning

1 - Allow maintenance with warning

2 - Prevent maintenance (all updates are via API)

3 - System Manager only (not via API)

### Description

Enter the description of the application.

### Day End Program

Enter the name of the program to be processed by the Application Manager day-end routine. For more details of the Application Manager day-end routine, refer to the Day-End Parameters section.

> Note: Machine Manager contains a standard job to run the Application Manager day-end process. To make sure day-ends are run regularly, you must set this up as a Machine Manager day-end job. Refer to the Machine Manager product guide.

### Company Validation

Enter the name of the program that is to validate the company when you first enter the application. Refer to the Company Validation Program section.

### Menu Style

Select one of the following:

Window (1) - For window-style menus

Conventional (2) - For conventional menus

This controls the style of menus created within the Maintain Menus option. Refer to the Maintain Menus section.

### Help Window Type

This field is now redundant.

The values are:

Standard (Blank or 0) - For normal Help windows

Reverse image (1) - For reverse image Help windows

## Functions

### Extras (F10)

Use this to display extra fields. These fields are for Ratioplan users only and are documented in the Ratioplan product guide.

### Classes (F14)

This is now redundant.

Note: This function is not displayed if you are creating a new application.

### URI Path (F15)

Use this to specify the default URL for the application. This can be overridden at task level. You would want to do this if you had .dll files associated with the application in a particular folder. The URI Path pop-up is displayed.

**Descriptions (F21)**

Use this to specify descriptions for the application in different languages. These will be used by workspace for users of other than the default language. The Select Language pop-up is displayed.

Note: This function is not displayed if you are creating a new application.

Select **OK** to confirm your selections. Select **Exit (F3)** to display the Exit Prompt pop-up on which you can choose whether or not to update the application, if you have made changes.

# Chapter 4 - Maintain Library Lists

# Maintaining Library Lists

You set up library lists within the system by referring to a set of standard library list files supplied with the system. These library lists cater for all standard uses of the applications, but you can maintain them to allow for tailor-made modifications to your applications. Each application has its own set of library lists. You can set up library lists for test or training environments to avoid impacting on your live data.

Note: When you install a Standard Application product, the installation routines, which are supplied with the product, will automatically establish the product's required library lists.

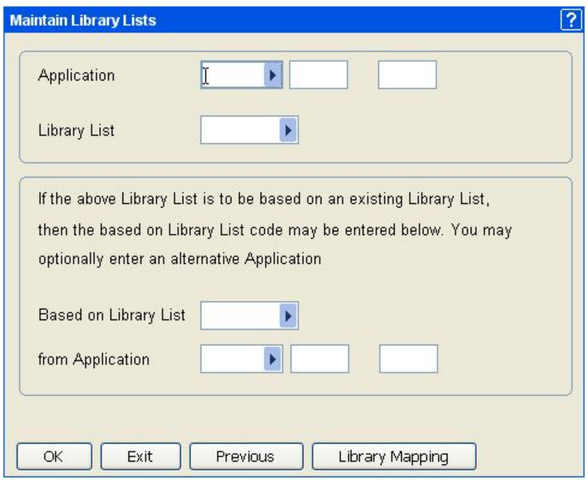
## Maintain Library Lists Window

To display this window, select **Maintain Library Lists** from the Application Manager Main menu.

Use this option to set up new library lists and to maintain existing library lists.

From this window you can select the option to maintain Version-to-Version Library Mapping to set up Library Mapping that can be used by the install application command AMINSAPP.

Note: The command AMINSAPP replaces the AMINSTALL command.




### Fields

#### Application

Enter the application ID. This appears automatically if you have already selected an application. It is the two-character application code is followed by the environment (version) and the release level.

If you use the prompt facility and choose an application from the Select Application pop-up, the full code is entered automatically.

### Library List

Enter an existing library list to maintain or a new library list code.

You can use the prompt facility on this field to select from the Select Library List Code pop-up.

### Based on Library List

If you are adding a new library list, you can base it on an existing one by entering the name of the existing one here. The values of this based-on library list will be copied to the new library list, and the maintenance window will allow changes to be made as required.

You can use the prompt facility on this field to select from the Select Library List Code pop-up. However, the pop-up is not populated until you have entered or selected a value in the From Application field.

### From Application

Enter the application which contains the library list you want to use as a basis for your new list.

Alternatively, use the prompt facility to select from the Select Application pop-up.

## Functions

### Library Mapping (F20)

If you are setting up a new environment using the AMINSAPP process, with re-named libraries, select **Library Mapping (F20)** to re-name the libraries automatically.

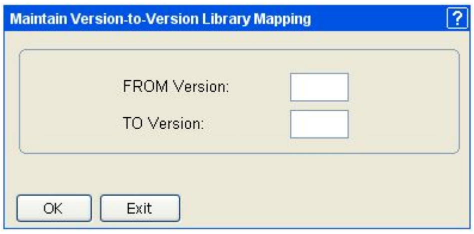
After making your selections, select **OK** to display the Maintain Library Lists Update window. If you select **Library Mapping (F20)**, the Maintain Version-to-Version Library Mapping Selection window is displayed.

# Maintain Version-to-Version Library Mapping Selection Window

To display this window, select **Library Mapping (F20)** on the Maintain Library Lists window.

Library mapping is the replacement of library names in the library list definitions with alternative library names. Use this window to set up to map libraries when you are installing an application using the AMINSAPP installation function.

Use this window to specify the install From Version and the install To Version for the set of library mapping details you are maintaining.




## Fields

### FROM Version

Enter the version from which you are installing. This could be left blank to indicate the standard product.

### TO Version

Enter the version to which you are installing.

Tip: You can make the To version the same as the From version. You would do this, for example, to use libraries that you have re-named from those shipped. You can also enter the same From and To versions for standard products (that is, application version *BLANKS).

Select **OK** to display the Maintain Version-to-Version Library Mapping Details window.

# Maintain Version-to-Version Library Mapping Details Window

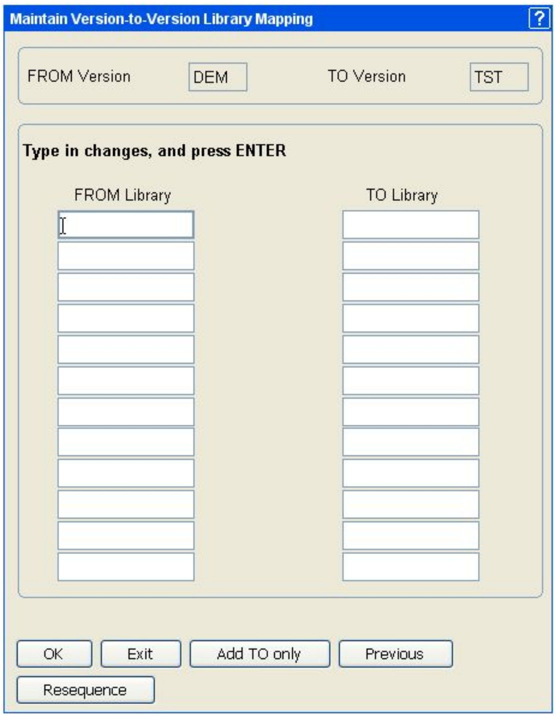
To display this window, select **OK** on the Maintain Version-to-Version Library Mapping Selection window.

Use this mapping window to specify the exact mapping names of the libraries. The versions you selected on the previous window are displayed at the top of the window.

Two types of library mapping details can be maintained on this window:

- To Version-only Additional Library Entries. (See the Maintain Version-to-Version Library Mapping Add to Only Window section for further information.)
- Version-to-Version Library Mapping Entries.

Use the Version-to-Version option to specify the alternative library name that should appear in installed library lists in place of the library name in the library lists supplied in the installation data.




## Fields

### FROM Library

Use both the From and To fields when you are doing a Version-to-Version mapping.

The From library name should be the name of the library that you want to replace. When you enter a From library, you must also enter a To library, except where the special value of *NONE is used.

Note: The standard product uses AUL libraries.

### To Library

The To library name specifies the name of the library that is to replace the From library. Enter *NONE in the To Library field when you want to omit it from the list rather than replacing with an alternative. The number of To Version-only Additional Library entries that can be specified will be 25 or 250, depending on the IBM switch on your iSeries 400.

Note: The To Version only entries will always be displayed at the top of the list.

## Functions

### Add TO Only (F8)

Use this when you want to specify an additional library that is not to be mapped, but that is to be added at the top of the library list. Any library specified in this way will be added to the top of every library list installed to the specified To version.

All the libraries you have entered so far will be moved down one line. Two new input fields appear at the top of the To Library column. Enter a three-character unique sequence number for the library, and the library name itself.

### Resequence (F17)

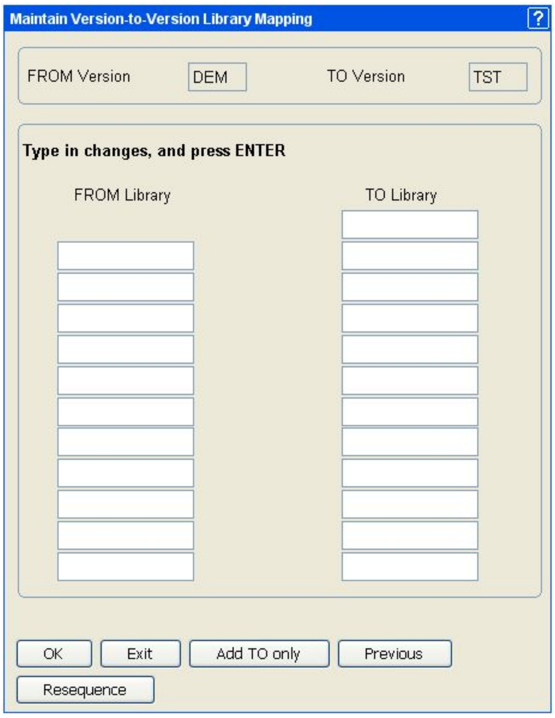
Use this to generate library sequence numbers for the To Libraries, starting at 10 and incrementing by 10. This is only for the libraries specified using **Add TO Only (F8 )**, not for the libraries to be mapped.

Select **OK** and then select **Exit (F3)**. The Update Prompt pop-up will be displayed, asking if you want to save or abandon your changes.

# Maintain Version-to-Version Library Mapping Add to Only Window

To display this window, select **Add TO Only (F8)** on the Maintain Version-to-Version Library Mapping Details window.

Use this window to map To Version-only Additional Library Entries. This window is similar to the Maintain Version-to-Version Library Mapping Details window has one additional field for you to add a sequence number for the mapping.




## Fields

### FROM Library

A From library cannot be entered when you are adding a To Library.

### Sequence Number (Untitled)

Enter a sequence number that is unique within the To Version-only Additional Library Entries.

### TO Library

You will be prompted to specify a sequence number for the entry as well as a library name.

Note: The To Version only entries will always be displayed at the top of the list.

## Functions

### Add TO Only (F8)

Use this to re-display this window with two fresh entry fields at the top of the list.

### Resequence (F17)

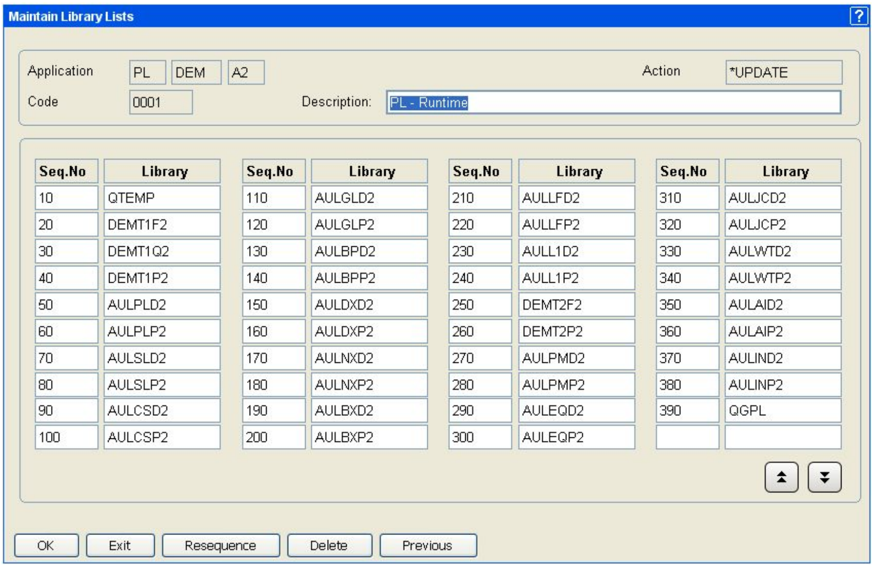
Use this to generate library sequence numbers for the To Libraries, starting at 10 and incrementing by 10. This is only for the libraries specified using **Add TO Only (F8 )**, not for the libraries to be mapped.

Select **OK** to validate your entries. The Update Prompt pop-up will be displayed, asking if you want to save or abandon your changes.

# Maintain Library Lists Update Window

To display this window, enter or select an application and library list and then select **OK** on the Maintain Library Lists window.

Use this window to enter or amend the libraries required to run the application. You can re-sequence the entries.




## Fields

### Description

Enter or amend the description of this library list.

### Seq No

As you enter each library, you must enter a sequence number against it.

The sequence number is what the system uses to sequence the libraries you enter. This wholly overrides the actual order in which you type in the libraries. When you select **OK**, the system re-displays the libraries in sequence number.

It is best not to use consecutive numbers, but to use numbers in steps of five or ten. This means that if you omit a library early in the sequence, say between sequence number 10 and 20, you can enter it at the bottom of the list but sequence it 15. When you select **OK**, it will be correctly sequenced.

### Library

Enter the libraries required to run the application. You can enter a maximum of 25 or 250 user libraries in any one list, depending on the IBM switch on your iSeries 400.

Note: The libraries required to run Application Manager are not required in the library list. They are automatically included in the system portion of the library list. You can include up to 25 or 250 user libraries in a library list, depending on the IBM switch on your iSeries 400.

## Functions

### Resequence (F5)

Use this to re-sequence the library list and re-number in steps of 10.

### Delete (F11)

Use this to delete the library list. Select **Confirm Delete (F11)** to confirm the deletion.

### Roll Keys

If you have more than 40 libraries in your library list, you can use the rolls keys to display further libraries.

On completion of the amendment of the library list, select **OK** and then select **Exit (F3)** to exit. The Exit Prompt pop-up is displayed, on which you are prompted to save or abandon your changes.

# Chapter 5 - Maintain Tasks

# Maintaining Tasks

Each activity carried out under the control of Application Manager is called a task. The task tells the system which program to call to perform an activity, and whether it is a batch (submitted) or an interactive task.

For example, a menu option can invoke a task, and when a user selects a menu option, the system refers to that task to find out which program to run.

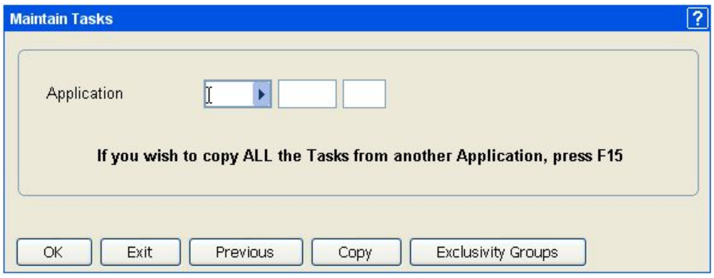
You could think of an application, for example Accounts Receivable, Sales Order Processing, and so on, as a set of tasks, logically grouped together To use the tasks in an application, a user must be granted authority to them.

For the convenience of the user, a single menu can feature tasks from across many applications.

## Maintain Tasks Selection Window

To display this window, select **Maintain Tasks** from the Application Manager Main menu.

Each application you install has its tasks already defined. We recommend that you do not change these application tasks in any way, but you can add bespoke tasks to these applications.




### Fields

#### Application ID

Enter the application ID (including environment and release level).

Alternatively, use the prompt facility to select from the Select Application pop-up.

### Functions

#### Copy (F15)

Use this to copy all the tasks for an existing application to a new application.

#### Exclusivity Group (F18)

This maintains exclusivity groups for application tasks.

If you leave all fields blank and select **Copy (F15)**, you will see the Copy Application Tasks window.

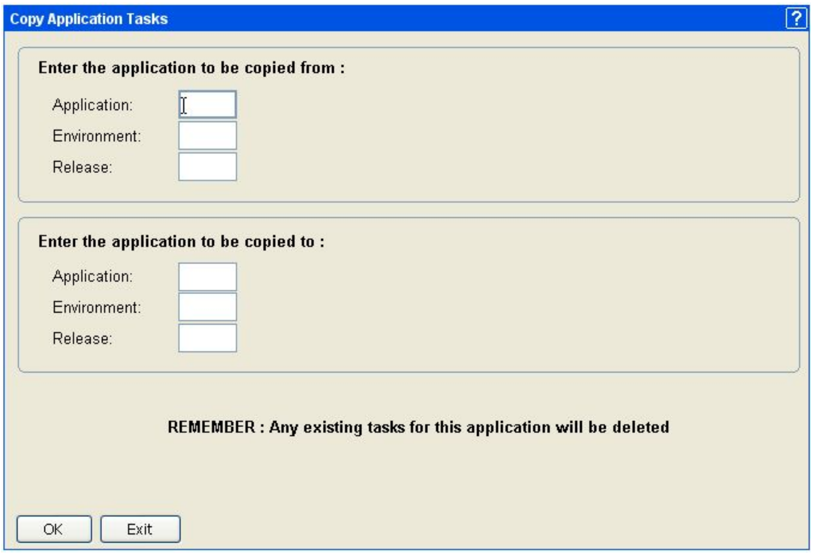
If you leave all fields blank and select **Exclusivity Group (F18)**, you will see the Maintain Exclusivity Groups Selection window.

If you select an application and then select **OK**, you will see the Maintain Tasks Selection window.

# Copy Application Tasks Window

To display this window, select **Copy (F15)** on the Maintain Tasks Selection window.

Use this window to specify the details for the copy.




## Fields

Note: Complete the following fields for both the new application (To) and the application from which you are copying (From).

### Application

Enter the two-character application ID.

### Environment

Enter the three-character environment (version) code of the application.

### Release

Enter the two-character release level of the application.

Note: Any existing tasks for the To application are deleted.

Select **OK** to confirm your selections and copy the tasks.

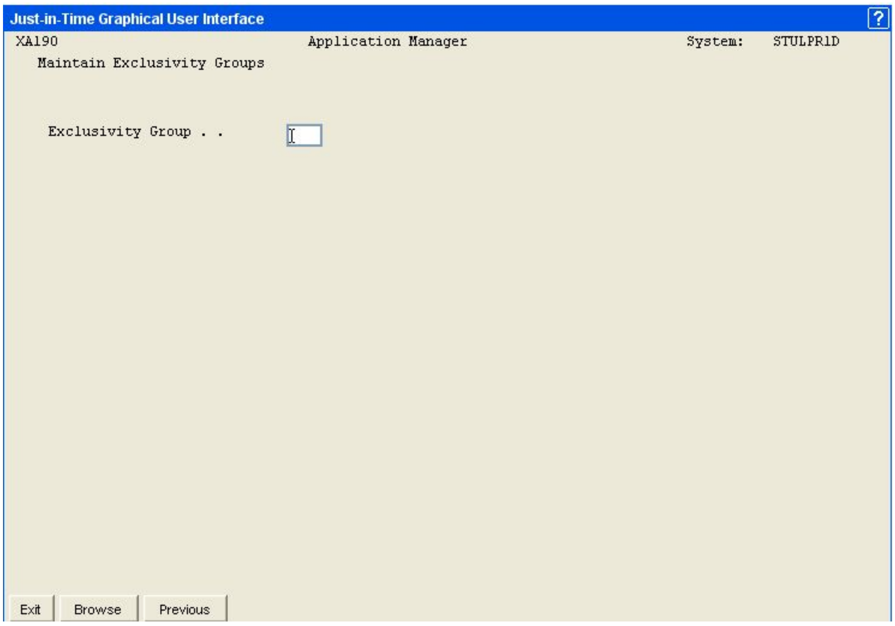
# Maintain Exclusivity Groups Selection Window

To display this window, select **Exclusivity Group (F18)** on the Maintain Tasks Selection window.

Any task in an application can interface into other applications. Certain tasks may require exclusive access to another application, or to more than one application.

This function is for defining such a group of applications. Once defined, you can then specify this group as a part of the exclusivity requirements of a task in the task's definition.

For standard applications, these exclusivity groups are created at installation, but you can create others here.




## Fields

### Exclusivity Group

Enter the exclusivity group you want to set up or maintain.

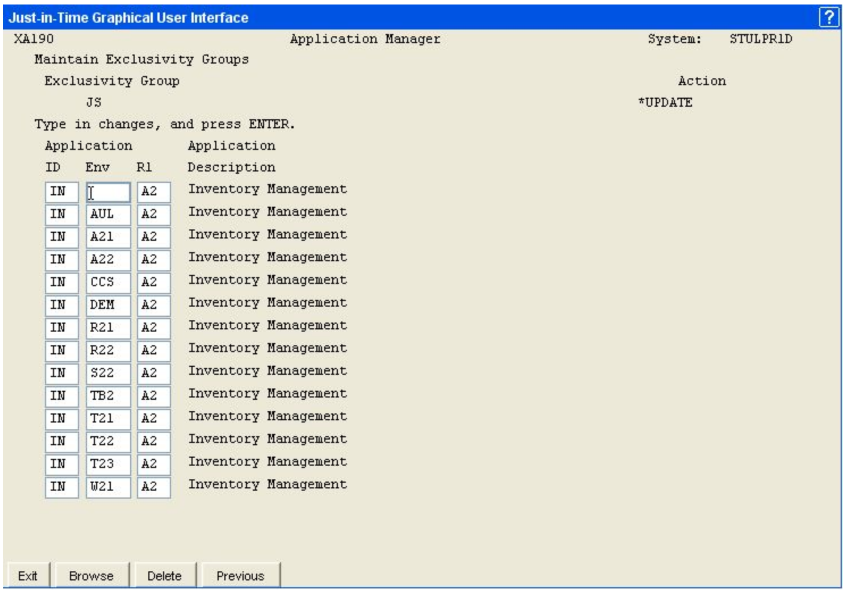
Alternatively, use the prompt facility to select from the Select Exclusivity Group pop-up.

Enter or select an exclusivity group and then select **OK** to display the Maintain Exclusivity Groups Details window.

# Maintain Exclusivity Groups Details Window

To display this window, enter or select an exclusivity group and then select **OK** on the Maintain Exclusivity Groups Selection window.

For an existing group, the current list of interfacing applications is shown.




## Fields

### Application

### ID

Enter the two-character application ID.

### Env

Enter the three-character environment (version) of the application.

### Rl

Enter the two-character release level of the application.

### Application Description

The description of the application is displayed when you select **OK**.

## Functions

### Delete (F11)

Use this to delete the exclusivity group. Select **Delete (F11 )** to confirm deletion.

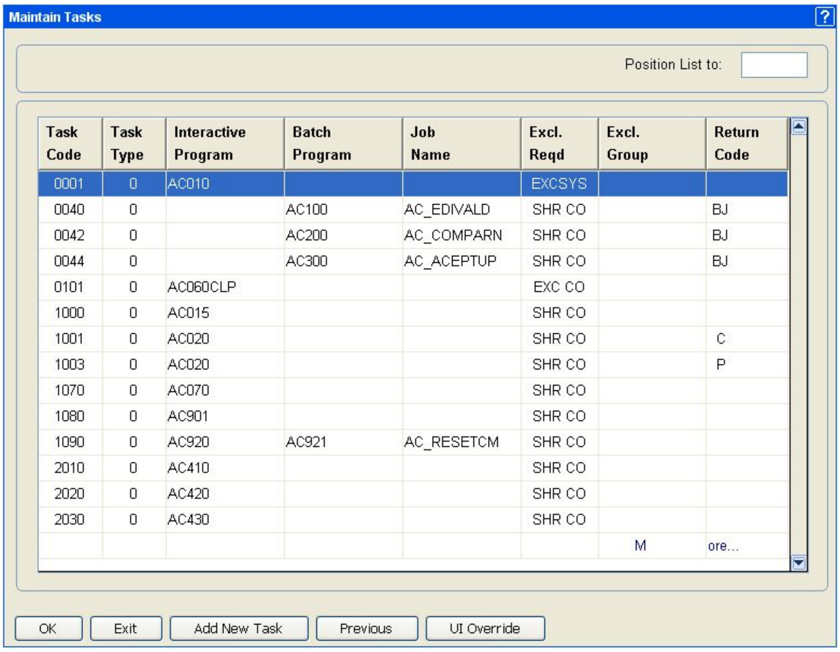
Select **OK** to validate and save the applications and then select **Exit (F3)** to leave. The Exit Prompt pop-up is displayed, asking whether you want to save or abandon your changes.

Note: You can have different companies interfacing. For example, you can link a single General Ledger company to many Accounts Receivable companies. You maintain this link using the company profiles within each application. For group exclusivity at company level, access these relationships to link the companies.

# Maintain Tasks Details Window

To display this window, select an application and then select **OK** on the Maintain Tasks Selection window.

This window displays details of all tasks defined to the selected application.




| Task Code | Task Type | Interactive Program | Batch Program | Job Name | Excl. Reqd | Excl. Group | Return Code |
|---|---|---|---|---|---|---|---|
| 0001 | 0 | AC010 | | | EXCSYS | | |
| 0040 | 0 | | AC100 | AC_EDIVALD | SHR CO | | BJ |
| 0042 | 0 | | AC200 | AC_COMPARN | SHR CO | | BJ |
| 0044 | 0 | | AC300 | AC_ACEPTUP | SHR CO | | BJ |
| 0101 | 0 | AC060CLP | | | EXC CO | | |
| 1000 | 0 | AC015 | | | SHR CO | | |
| 1001 | 0 | AC020 | | | SHR CO | | C |
| 1003 | 0 | AC020 | | | SHR CO | | P |
| 1070 | 0 | AC070 | | | SHR CO | | |
| 1080 | 0 | AC901 | | | SHR CO | | |
| 1090 | 0 | AC920 | AC921 | AC_RESETCM | SHR CO | | |
| 2010 | 0 | AC410 | | | SHR CO | | |
| 2020 | 0 | AC420 | | | SHR CO | | |
| 2030 | 0 | AC430 | | | SHR CO | | |

## Fields

### Position List To

Use this to position the list to the selected value.

## Options

### Select

Use this to select an existing task for maintenance.

## Functions

### Add New Task (F8)

Use this to add a new task.

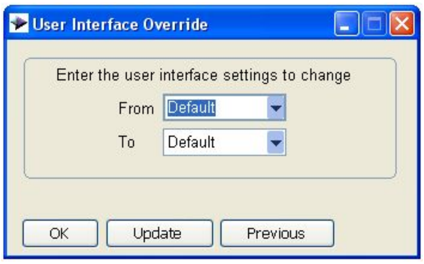
### UI Override (F15)

Use this to display the User Interface Override pop-up.

Select **Add New Task (F8)** or select an existing task to display the Maintain Tasks window.

# User Interface Override Pop-up

Use this pop-up to override the default user interface.




## Fields

### From

Select one of the following:

All (*)

Default (Blank)

Jacada (1)

Emulator (2)

### To

Select one of the following:

Default (Blank)

Jacada (1)

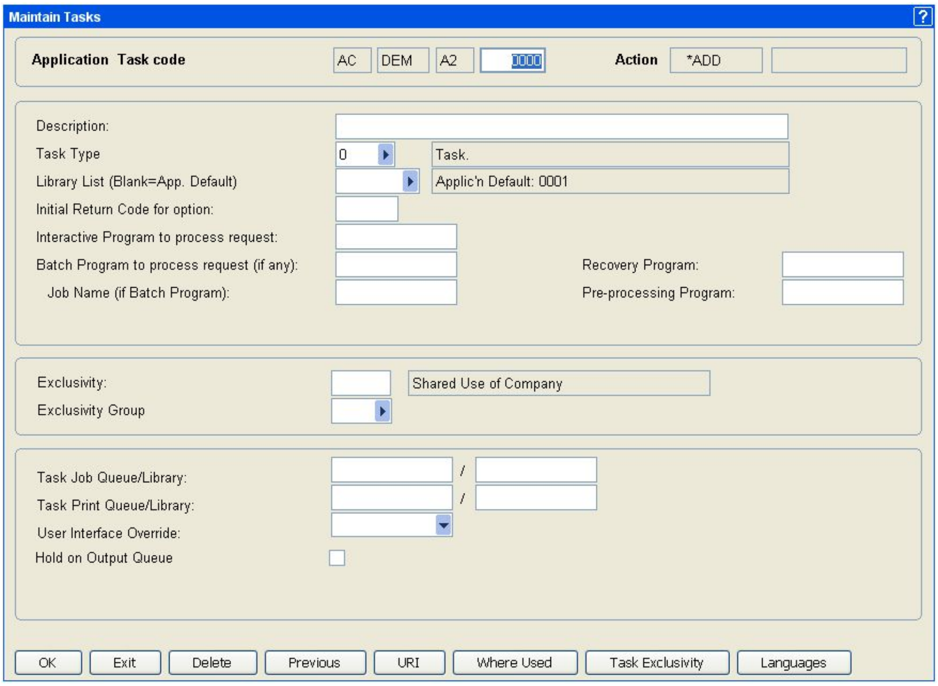
Emulator (2)

Select **Update (F8)** to update or **Previous (F12)** to return to the previous window.

# Maintain Tasks Window

To display this window, select **Add New Task (F8)** or select a task on the Maintain Tasks Details window.

In GOB only, the window is arranged differently and when you first enter this window, only the first four fields on the window (down to and including the Job Name field) are displayed. Select **Extras (F10)** to see all the fields available on this window. In Workspace, all fields are displayed and **Extras (F10)** is not displayed.




## Fields

### Application Task Code

If you are adding a new task, enter the unique task code here. If you are amending an existing task, this field will display the task code you selected.

The following numbering convention is recommended:

- Reserve numbers below 0099 for functions that do not require company validation at initialisation, for example company maintenance, or print company profiles.
- Numbers 0100 to 8999 are for standard application tasks. Company validation is performed before initialising this task, if the application profile has a nominated validation program.
- Numbers 9000 to 9899 are for bespoke tasks.
- Numbers 9900 to 9999 are reserved for System21 Aurora utilities.

Note: See the Company Validation Program section for more details about using company validation programs.

### Description

Enter the description of the task. This is used in searches, so make sure it accurately reflects the job to be carried out and is spelled correctly.

### Task Type

Enter one of the following:

0 (default) - Task

This means it is not a subtask.

1 - Subtask

A task may consist of several routines, or subtasks, that are not individually specified as a menu response. You can use subtasks to authorise users to parts of a task rather than the whole task. Subtasks are linked to the parent task via programming. A menu option cannot be a subtask.

2 - Function list

This will initiate an IPG/400 function list.

3 - IPG report

This will run an IPG/400 report.

4 - Ratioplan task

This is a Ratioplan subtask. The Maintain Tasks - Ratioplan Extras window is displayed to enter Rationplan details.

5 - Third party task

This will run a third party task.

6 - External task

This will run an external task.

> Note: External tasks are launched outside System Manager but are registered to System Manager so that they are subject to the same licensing, authorisation and exclusivity rules used by any other task.

7 - XA task

This denotes a task that launches using XA.

8 - LX task

This denotes a task that launches using LX.

9 - XA task (emulator)

This denotes a task that launches inside Workspace Emulator using XA.

A - LX task (emulator)

This denotes a task that launches inside Workspace Emulator using LX.

### Library List (Blank=App. Default)

Use this field to override the default library list for the application.

Alternatively, use the prompt facility to select from the Select Library List Code pop-up.

> Note: When you install a standard application product, the installation routines automatically establish the product's required library list.

> Note: The objects of the programs to be called must be present in the library list set up for the application.

### Initial Return Code for Option

If a special return code is to be passed to the program, enter the initial value. The return code is contained in positions 118 to 119 of the Local Data Area in a field named L#RTCD.

The following values are reserved for use with Background Processing Jobs:

Tasks in the cross-company range (0001 - 0099)

- BJ Batch, cross-company, single-instance
- B0 Batch, cross-company, single-instance
- B1 Batch, cross-company, multi-instance

Tasks in the general-company range (0100 - 9999)

- B2 Batch, single-company, single-instance
- B3 Batch, single-company, single-instance

The Background Subsystem function recognises these settings to determine which tasks are background processors.

> Note: For Generic Application (L1) V2.2: The Background Processor only supports tasks specified as BJ - running cross-company and single instance.

> **Warning: Do not change the shipped application settings, they are preset to reflect the capability of the application programs.**

### Interactive Program to Process Request

If there is to be interactive processing as part of this task, enter the program name to call.

### Batch Program to Process Request (if any)

If there is to be batch processing as part of this task, enter the program name to call.

### Recovery Program

Enter the name of the recovery routine to invoke if the user's last access of this task terminated abnormally.

### Job Name (if Batch Program)

If a batch job is to be submitted, enter the job name to be used to identify it. This is the name that will appear in job queues. It is therefore a good idea to make this a recognisable and unique name.

> Tip: GOB only. Select **Extras (F10)** to display the following additional parameters. (These are already displayed in Workspace)

### Pre-processing Program

If you require any processing before the initialisation of this task, enter the name of the program to call.

### Exclusivity

Enter one of the following:

Blank - Share Company

Enter this if no exclusivity is necessary.

C - Company

The task requires the exclusive company use of this application.

N - No Exclusivity

The task is exempt from exclusivity. It can start even if another company or system exclusivity task is active. Also if it is active it will not prevent any other task with exclusivity requirements from starting.

R - Restricted Exclusivity

The task only has potential running conflicts with system exclusive tasks.

For example you may have a background processor that runs cross-company, that needs to stay active even when some single company needs exclusive use. However if system exclusivity is required to perform, say, a global action on the database then the conflict needs to be recognised.

S - System

The task requires the exclusive system use of this application.

1-9 - Share classes

Use share classes to specify tasks that can and cannot run concurrently.

For example, you have a task that extracts data from a number of files, and a number of maintenance programs for those files. When the extract program is active, you do not want the maintenance programs to be active. To achieve this exclusivity, make the extract program share class 1, and the maintenance programs share class 2. All of the other tasks within the application could have a blank share class as they have no impact on the running of the extract program.

> Note: The task is not processed unless the exclusivity requirements are met. Similarly, the task, once active, inhibits any subsequent tasks, which break this exclusivity.

**Warning: Previously some installations switched off the single-company versus cross-company exclusivity testing by setting the value of data area AMAMPREQD to '1'. For the full benefit of Restricted and No Exclusivity this data area, if it exists, should be set to '0' and the background tasks configured to use appropriate exclusivity including 'N' and 'R' as required.**

### Exclusivity Group

If this task requires company or system exclusivity of other applications, enter the group number assigned to the required set of applications. You set up exclusivity groups by selecting **Exclusivity Groups (F18)** on the Maintain Tasks Selection window.

You can use the prompt facility on this field to select from the Select Exclusivity Group pop-up.

### Task Job Queue/Library

Use this to specify the job queue to which this task will be submitted. This will override the default from the task user's registration.

Leave this field blank to use the user's default.

### Task Print Queue/Library

Use this to specify the output queue to which printed output is sent for this task. This will override the default from the task user's registration.

Leave this field blank to use the user's default.

### User Interface Override

The Task User Interface can be set to:

Default (Blank)

Jacada (1)

Emulator (2)

To avoid the need to maintain each task individually, **UI Override (F15)** on the Maintain Tasks Details window provides the ability to change all tasks to the desired setting.

### Hold On Output Queue

Use this checkbox as follows:

Unchecked - If any printed output for this task should be printed immediately

Checked - If any printed output for this task should be held until it is released for printing by a user

This will override the default from the task user's registration.

Leave this field blank to use the user's default.

Note: These job queue and output queue definitions are overridden if user level overrides exist. See the Administration Functions product guide for details of user overrides.

## Functions

### Extras (F10)

This is only available in GOB when you first enter the window. Use it to display all the fields from the Initial Return Code downwards. Once you have selected it, it disappears. It is never available at the same time as **Ratioplan (F10)**.

### Ratioplan (F10)

You will only see this if you are maintaining an existing task that has a task type of **4**. This is only relevant for Ratioplan users and is only available in GOB.

### URI (F14)

This is only for task with a task type of **6**. Use it to set up a URL for this task.

### Where Used (F19)

Use this to display the Task Where Used pop-up listing the menus, and the options within those menus, that use this task. This is only available if you are maintaining an existing task.

### Task Exclusivity (F20)

Use this to display the Maintain Task Exclusivity window. This is only available if you are maintaining an existing task.

### Languages (F21)

Use this to add task descriptions in languages other than the default language. The Select Language pop-up will be displayed, allowing you to choose a language in which to enter the description.

You then enter the description of the task on the Maintain Description pop-up.

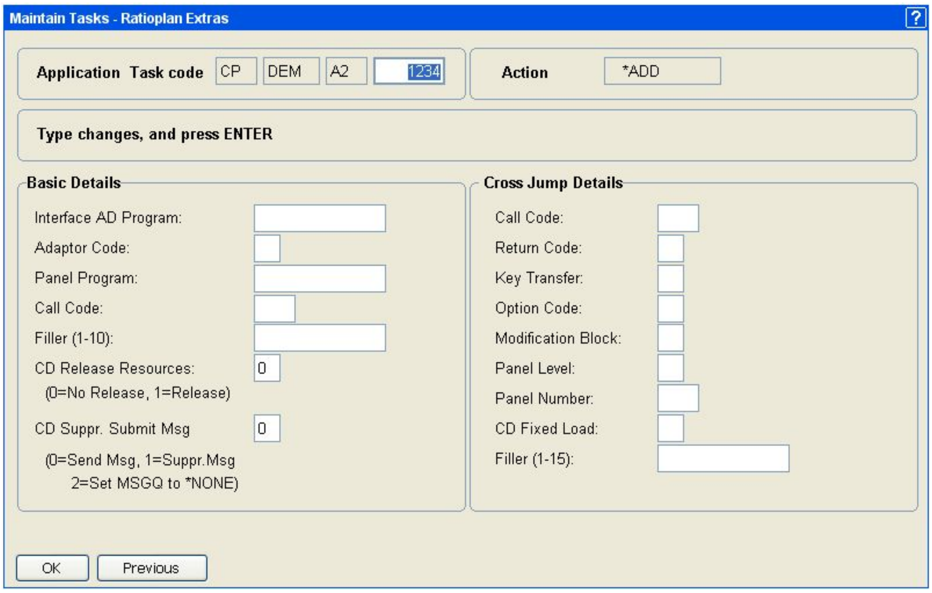
This feature is available in several areas of System Manager, and is fully described in the Maintain Menus section of this product guide.

Select **OK** to update the task.

# Maintain Tasks - Ratioplan Extras Window

This window is displayed when you enter or maintain a task with task type of 4.

Use this window to specify the Ratioplan details.




## Fields

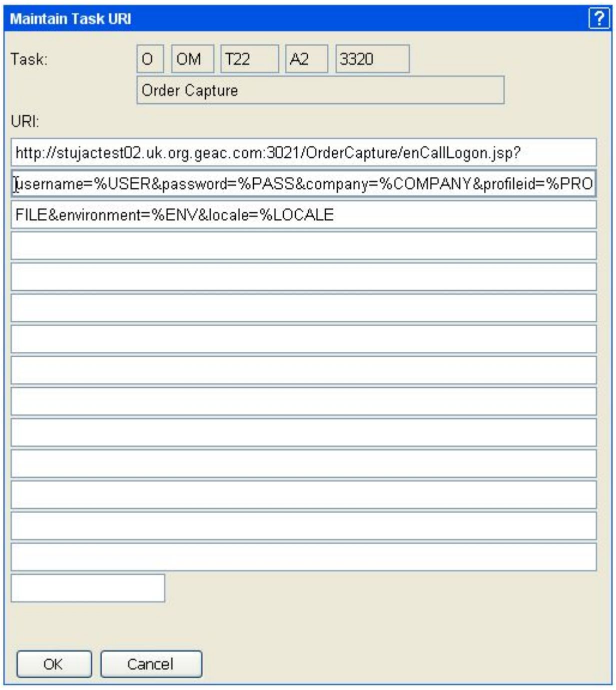
These fields are only relevant to Ratioplan users. See the Ratioplan product guide for details.

Select **OK** to update the data and return to the previous window.

# Maintain Task URI Window

To display this window, select **URI (F14)** on the Maintain Tasks window.

Use this window to specify the URI for a particular task.




## Fields

### Application Path (Untitled)

Enter the fully qualified path name for the application.

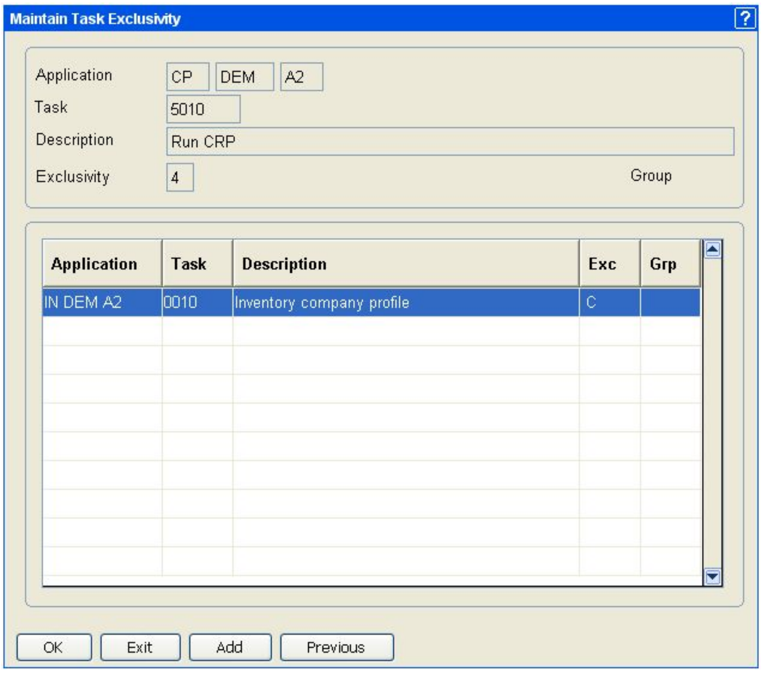
In addition, any number of command line parameters can be passed into the application. Special parameters are available, for example **%USE**R and **%PAS**S, which will be substituted with the corresponding Workspace parameters.

Select **OK** to process any additions or changes, or select **Cancel (F12)**. In either case, you will return to the Maintain Tasks window.

# Maintain Task Exclusivity Window

To display this window, select **Task Exclusivity (F20)** on the Maintain Tasks window.

Use this window to specify tasks that cannot be executed if the selected task is active.




## Fields

### Application

This field displays the name, environment and release level of the application.

### Task

This field displays the number of the task.

### Description

This field displays the given description for the task.

### Exc

This field displays the exclusivity code assigned to the task.

### Grp

This field displays any exclusivity group associated with the task.

## Options

### Delete

Use this to delete the task exclusivity. No confirmation is required.

## Functions

### Add (F8)

Use this to display the Select Task pop-up. Enter the required information in the Application ID, Environment, Release Level and Task Code fields and then select **OK** to add the task.

Select **Previous (F12)** to return to the Maintain Tasks window.

# Select Task Pop-up

To display this pop-up select **Add (F8)** on the Maintain Task Exclusivity window.

Use this pop-up to select or enter the task details to be added to the exclusivity list for the selected application task.


## Fields

### Application ID

Enter the application ID.

Alternatively, use the prompt facility to select from the Select Application pop-up. The next two fields will also be completed.

### Task Code

Enter the task code.

Alternatively, use the prompt facility to select from the Select Application Task pop-up.

When you have entered the task identification details, select **OK** to display the details on the Maintain Task Exclusivity window.

# Chapter 6 - Maintain Menus

# Overview of Menu Structures

Application Manager provides a flexible approach to creating and amending menus.

In the standard menu system, delivered with application software via installation files, tasks are grouped on menus according to the type of job they perform. Maintenance tasks are on a maintenance menu, reports on a report menu, and so on. You access these menus from an initial menu, on which the submenus menus appear as menu options.

The menu names are in the form XX for the initial menu, and XXY for submenus, where XX is the application code and Y represents the activity type. Utility menus are XXU.

You can restrict a user's authorisation just to the Inventory Maintenance menu, or allow access to the entire Inventory Management application.

For users who are to access more than one application, a top-level menu is provided. This menu has all the application initial menus defined as options.

For each user you need to:

- Create a user profile with the correct initial menu
- Grant authority to the menus and menu options required
- Grant authority to the companies used within each application

To do this you use the Maintain User Profiles option. Refer to the Administration Functions product guide for further details.

# Using Menus for Command Entry

Application Manager GOB menus and Workspace Quick Launch allow commands to be entered as well as allowing the user to select menu options.

> Note: Commands can only be entered if the user has sufficient authority. Authority to enter commands is controlled by the Administration Functions User Profile: see the Maintain User Profiles section in the Administration Functions product guide.

This means that users are allowed to enter IBM OS/400 commands, System Management commands, Work Management commands, Application commands or your own bespoke commands. The Application Manager module's main task is to be the driver of your applications; to do this it makes extensive use of library lists and the LDA (local data area). If the user accesses a function by entering commands, Application Manager will not protect (or save) the library list or the LDA. Thus the library list and LDA will not be saved before execution of a command, and they will not be restored back when the user completes the execution of the command and returns back to the control of Application Manager.

> Note: Application Manager does not save the library list and LDA before the execution of commands, as this is a time-consuming activity, and would impact the runtime performance of Application Manager.

Therefore, if you are going to execute commands from Application Manager menus that affect the library list and/or the LDA, you should save them before executing the command, and restore them back afterwards. There are a number of commands supplied which enable you to do this; they are:

- PUTLDA
- GETLDA
- PUTLIBL
- GETLIBL

> Note: The majority of IBM OS/400 commands have no effect on either the library list or the LDA and thus can be executed without causing any problems.

## Application Bespoke Menus

Each application is supplied with a ready to use bespoke menu for your own use. If you have additional tasks you want to access via an application menu, you can put these tasks on the bespoke menu.

To do this:

- Use the Maintain Tasks option in Application Manager to enter the bespoke tasks for each application. Use the task code range 9000 to 9899. See the Maintain Tasks section.
- Use the Maintain Menus option in Application Manager. A skeleton bespoke menu is provided for each application.
- Grant authority to the options and functions on the bespoke menu to the users who have access to them. Do this before users are given access to the menu.

## Creating Menu Structures

There are several ways in which to use the Application Manager menu structure. As well as using the standard menus, you can create your own menus.

There are many reasons for creating your own menu structures:

- To combine tasks from a number of different applications on the same menu
- To prevent users from seeing options on their menus to which they have no authority
- To create menus for your own applications

Note: When you are granting users authority to options, you also have to authorise them to functions and companies.

## Single Application Examples

There are three ways of giving a user authority to the Inventory Management Maintenance and Processing menus.

### Method One

Use the existing standard menu structure but give selective authorisation. Use the Maintain User Profiles option in Administration Functions (see the Maintain User Profiles section of the Administration Functions product guide).

- Create the user profile, and specify the initial menu as IN, then grant authority to options 1 and 2 on IN, which lead to menus INP and INM respectively.
- Grant authority to the required options and functions on menus INM and INP.

### Method Two

Create your own initial Inventory Management menu (see the Maintaining Menus section).

- Use the Maintain Menus option to create a new menu based on the standard menu IN. The menu window should only show the submenus required.
- Use the Maintain User Profiles option to set the new menu as the initial menu for the user. Grant user authority to this menu and the submenus.

**Method Three**

Create a single bespoke menu with all the options from the Inventory Management Maintenance and Processing menus on it.

- Use the Maintain Menus option to create a new menu.
- Grant user authority to the menu and its options, and set this menu as the user's initial menu.

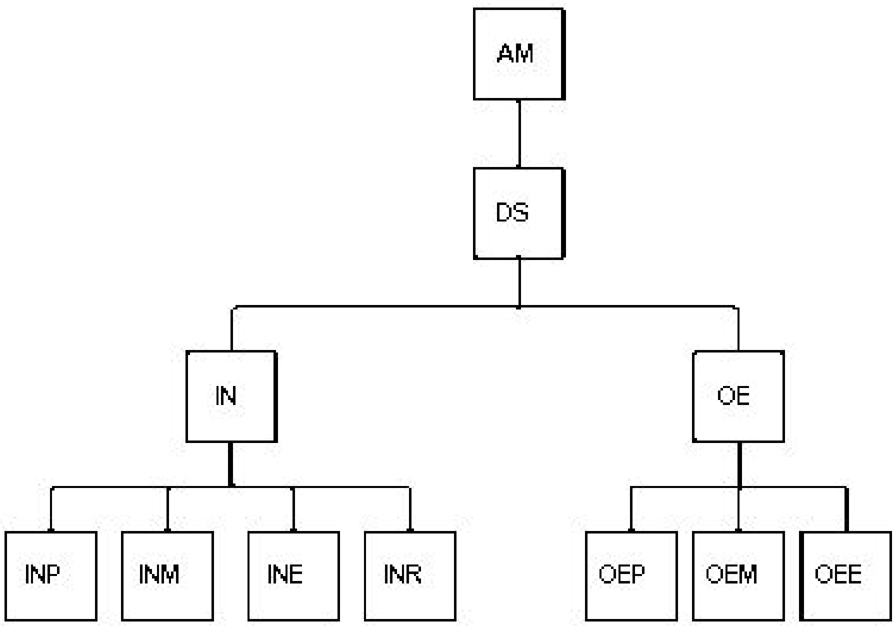
## Multiple Applications Examples

There are four ways of authorising a user to a number of different applications.

**Method One**

Use the existing menu structure but grant authority to selected application submenus. For example, you might want a user to have access to the Inventory Maintenance menu and the Order Entry Processing and Maintenance menus.

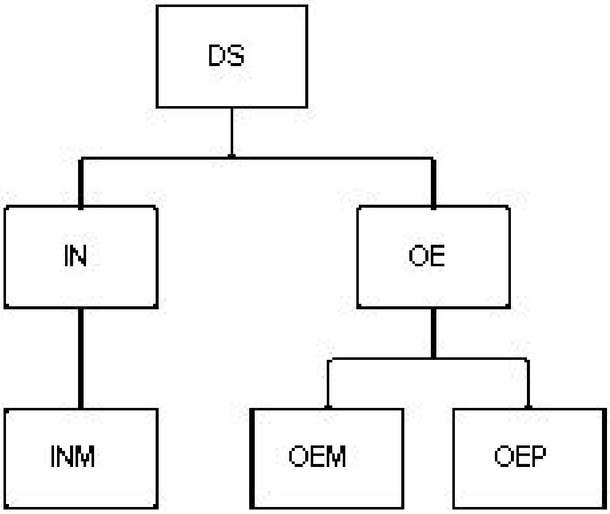
The standard menu structure is:




- Use Maintain User Profiles and set the user's initial menu to DS. Grant authority to the options for submenus IN and OE.
- Now grant authority in menu IN to use the option for submenu INM. Also grant authority in menu OE to use the options for submenus OEM and OEP.

- Grant the user authority to the options on menus INM, OEM, and OEP.

This creates the following menu structure:

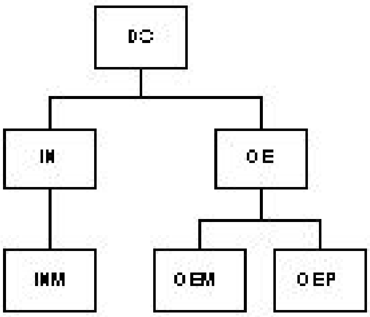



## Method Two

Create a bespoke initial menu.

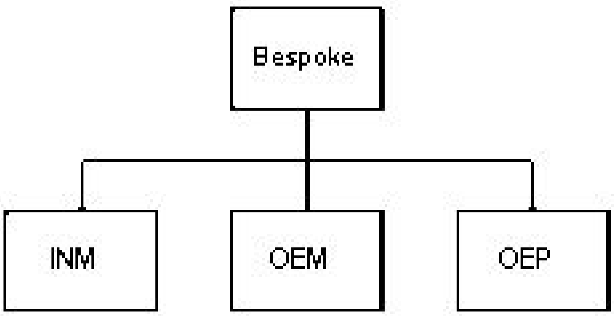
- Create a bespoke menu based on menu DS but with only the required options.
- Grant authority to this menu and the submenus.

Therefore this structure is:

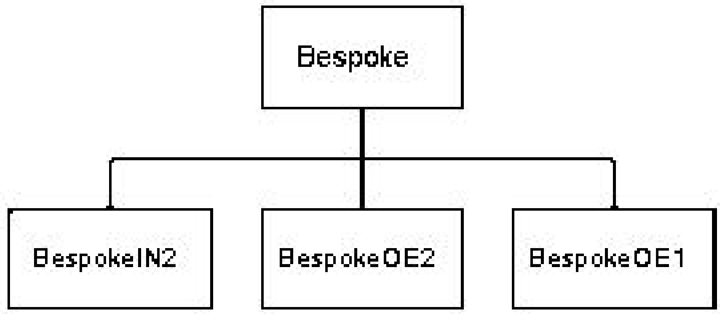



## Method Three

Create a bespoke menu combining the Inventory and Order Entry submenus to create the following structure:



This can be further developed to only display user-authorised functions on the menus. Use the based-on menu technique to create this structure:




### Method Four

Reduce the menu levels further, using a single bespoke menu containing all authorised options. This would depend on the number of options to which the user has access.

### Hints on Menu Structures

- Plan any new menu structures carefully.
- Define new menu hierarchies from the base menu level upwards. Then work to the top of the menu structure, creating the initial menu last of all.
- When granting user authority to a menu, do not forget to grant authority to the Previous (F12) function. This may be the only method of exiting the menu.
- Make sure that you have created all the tasks you require, especially bespoke tasks, before you create menus.
- Do not change the standard application menus. These may be refreshed by future releases of the software, and you would lose your changes.

## Role Menus

In role processing mode, the objective is to organise the tasks into groups that represent job functions, for example sales order clerk, account manager, etc.

A role is typically authorised to a small number of tasks that allow that job function to be performed effectively.

A user might be responsible for performing a number of different roles within the organisation.

The hierarchical menu structures can be used to provide logical groupings of the tasks to be performed. Each menu/sub-menu should only contain tasks that the role is allowed to perform.

# Expert Mode

You can use expert mode to bypass the menu control altogether and enter directly the options you know are available.

### Going to a Specific Menu or Menu Option

To go to another menu, for example INM:

- In Workspace, enter /INM in the Quick Launch field and select Launch (Command)
- In GOB enter /INM on a command line and press Enter.

To access a specific menu option, for example option 2 on menu INM:

- In Workspace, enter 2/INM in the Quick Launch field and select Launch (Command)
- In GOB enter 2/INM on a command line and press Enter.

Tip: In GOB only, to select from all the menus you are authorised to, type / and select **OK** on the command line.

In role mode, this displays all the menus to which the current role is authorised.

### Search

In Workspace, you can use the Search facility to search for a menu, command, task or web page by name including or excluding specific words (see the Search Window section). The results are listed on the right of the Workspace and the required item may be selected from there.

In GOB, if the Search line is displayed below the Option line, you can search on a word. Enter the word and press **Enter** to display a list of all the tasks that contain this word in their description. Select the required task by entering **1** against it, and you are taken straight into the option.

In GOB, if the search dictionary does not know the word, existing words with a similar spelling are listed. If you select **F5=Add**, you can associate your new word with an existing word that is close in meaning. This translation is then added to the search dictionary for future reference.

### Change Company

In GOB, to change the company you are using within an application, enter the command:

```
CHGCO CONO(Company Code)APPL(Application ID)
ENV(Environment)RLSL(Release Level)
```

To change company for all applications enter:

```
CHGCO CONO(Company Code)
```

You can also specify a menu option with a user-defined function of CHGCO. Enter the company code in the menu's Option field and select the chosen function to change the company.

In Workspace, move your mouse over the Toolbar until the Change Company drop-down box is visible. You can then select the desired company from the list.

## Change Role

In GOB, to change role, enter the command:

```
CHGROL
```

You will be prompted with a list of roles to which you are authorised.

# Maintaining Menus

Use this option to create and maintain menus. You must design the menu window layout, select the option and function actions, and grant users or roles the authority to use them.

It is recommended that you also refer to the following sections of this product guide:

**Menu Overview**

This describes how to set up user menus.

**Maintain Tasks**

This describes how to set up the tasks in an application.

> Note: Do not change the standard application menus, as they may be updated by future releases of the software.

## Maintaining Menus

It is possible to maintain descriptions, in multiple languages, for menus, menu options, tasks and roles. The menu displayed in Menu Manager can either be displayed as a static panel, pre-painted to a specific layout, or built dynamically, based on the options defined to a menu and the user's authority to the tasks.

Application Manager's Maintain Menus option:

- Provides you with total flexibility in menu layout
- Allows you to create multiple menus per user: users can also share menus
- Allows you to create menus which display a users' tasks in their own terms
- Allows a single menu to contain tasks from different applications

## Components of a Menu Window

A window for menus consists of the following elements:

- Variables and values, for example, the company name, the date and the time
- Literals, such as:
  - The option descriptions
  - A menu title

- An input field where users can enter the selected option
- An input field where users can enter search words

## Computer Responses

The computer can respond to two types of menu activity:

- Selecting OK after entering an option, command, or search word
- Selecting a function key

The functions assigned to function keys can be affected by what is typed in the option field.

This can invoke three types of response:

- Processing an application task
- Displaying another menu
- Executing a user-defined function, for example an IBM command

Note: For user-defined functions, it is assumed that the user portion of the library list will not change. If you are going to manipulate the library list, you must save it before executing your function and restore it afterwards. See the Using Menus for Command Entry section for further details.

## Variables

Variables may be output by the computer, for example date and time, or input by the user, for example the option number. All the variables you use must be defined as reserved words so that the computer can recognise them. Some are already defined for you when the system is installed. To set up others you must select **Maintain Reserved Words (F20)** within the Maintain Menus option.

## Special Words

You can use the following special words when defining menus. See the Select Reserved Word Pop-up section for further information.

### RETURN

All menus must have an option or function to return the user to the previous menu, and another to sign them off. Enter the special word RETURN as the user-defined command to return to the previous menu. The special word EXIT signs the user out of Application Manager Mouse Driver.

### PROMPT

If a user is authorised to enter commands on menus, they may need to prompt the command. To do this, set up the special word PROMPT as a user-defined function.

Users can also use the PROMPT function to change the default details of submitted jobs. If the user selects a batch job, after completing any required selection parameters, they are able to change the submission parameters of the job. For example, they could change the job and output queues and specify when the job will run. See the Submitting Batch Jobs to the Machine Manager Scheduler section for further details.

### CHGCO

The command CHGCO has been created to change companies. This should be specified in a multi-company environment.

### DUP

The special word DUP has been created to duplicate the previous command entered.

### HELP

The HELP key is automatically enabled. If you wish to use a function or option to display help, use the special word HELP.

# Maintain Menus Selection Window

To display this window, select **Maintain Menus** from the Application Manager Main menu.

Use this option to amend an existing menu or create a new menu.

The facility to maintain menu-related descriptions is provided. A language code is entered on the entry window to allow the descriptions to be displayed and maintained in the appropriate language.

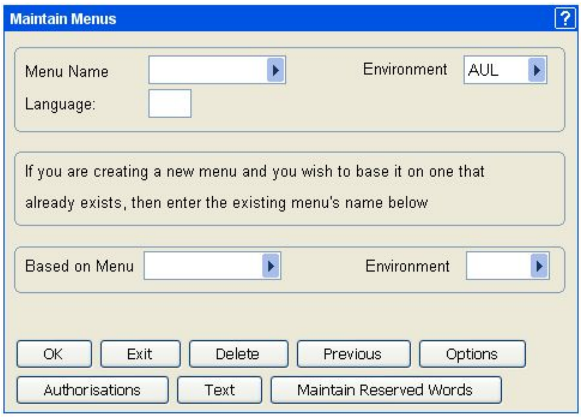
When you are adding options that will launch commands, a function is provided to maintain the associated descriptions.

Option and function descriptions can be overridden by using one of the maintenance options:

Static panels can be converted to dynamic menus by changing the menu style on the menu header (**Text (F19 )** from the initial window).

Note: If you are creating a new menu and you assign it to an application, its default style is controlled by the application profile. You can, however, edit the menu as required.

Note: If you are creating a new menu, unless the menu is very similar to an existing one, use method **Three** and the Fast Path Menu Creation route.




## Fields

### Menu Name

Enter the name of an existing menu which you want to change, or a new menu which you want to create.

Alternatively, use the prompt facility to select from the Select Menu pop-up.

Note: If you are using the prompt facility to obtain a list of menus, the list will only include menus that match the environment specified. If you use the prompt facility in Based On mode, that Based On environment will be used.

#### Environment

Enter the environment to which this menu belongs. (This field will be initialised to your default environment.) Menus with a blank environment are used by the system in any environment where a menu for that specific environment cannot be found.

#### Language

This defaults to the user's language code but can be changed.

This only applies to the menu metadata; it does not change the WFi Manager windows.

**Warning: Where WFi Manager looks for default literals on a message file, the user's set-up and library list will be used and is this is not affected by changing the language code.**

**Warning: The following two fields are only used when you are creating a new menu from an existing one.**

#### Based on Menu

Enter an existing menu on which you want to base your new one. Only complete this field if you are creating a new menu.

Static and dynamic menus can be copied using the based on function.

You can use the prompt facility on this field to select from the Select Menu pop-up.

Note: You can not convert between the two settings during the copy. Instead copy the menu and then maintain the setting via **Text (F19)**.

#### Environment

Enter the environment (version) to which the menu specified in the Based On Menu field belongs.

## Functions

#### Delete (F11)

Use this to delete the menu from the environment. The Menu Design window is displayed. Select **Confirm Delete (F11)** to confirm or select **Previous (F12)** to cancel the deletion.

#### Options (F16)

Use this to display the Maintain Menus Operations window where you can add, amend or delete functions and options.

#### Authorisations (F17)

Use this to display the Select User/Role Authorisations pop-up for the menu identified in the Menu Name and Environment (version) fields.

#### Text (F19)

Use this to display the Maintain Menus pop-up, where you can change the heading text on a menu, its public authority flag or the application it is assigned to (if any).

If you are creating a new menu, you do not have to select this function. You will go straight to the Maintain Menus pop-up when you select **OK**.

### Maintain Reserved Words (F20)

Use this to maintain variables or reserved words, which can be used within your menus.

Select **OK**.

If you are creating a new menu, or basing a new menu on an existing menu, the Maintain Menus pop-up is displayed.

If you are amending an existing menu, the Menu Design window is displayed.

Note: If a menu has been converted to the new dynamic type, pressing **Enter** displays the Maintain Menus Operations window (also accessed via **Options (F16)**).

# Select User/Role Authorisations Pop-up

To display this pop-up, select **Authorisations (F17)** on the Maintain Menus Selection window.

Use this pop-up to grant roles, users or both authorisation to the activities (options and functions) on your menu.


## Fields

### Opt

Use these checkboxes as follows:

Unchecked - If you do not wish to maintain that authorisation type

Checked - If you wish to maintain that authorisation type

Select **OK** to display the appropriate authorisation pop-up.

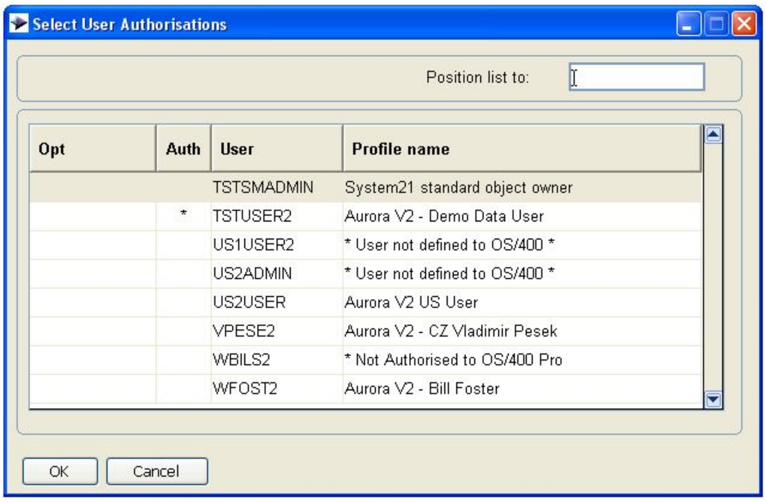
# Select Role/User Authorisations Pop-up

To display this pop-up select **Authorisations (F17)** on the Maintain Menus Selection window and **check** Role and/or User authorisations.

The pop-ups are identical except one is headed Select Role Authorisations and the other is headed Select User Authorisations.

Use this pop-up to grant roles or users authorisation to the activities (options and functions) on your menu.

A list of all Administration Function's defined roles or users is displayed. If any have been previously authorised to this menu an asterisk (*) appears next to the profile name.




## Fields

### Position List To

Use this to position the list at the entered value.

## Options

### All

Use this to grant the selected user authority to all options and functions on the menu.

### Revoke

Use this to revoke the user's authority to options and functions on the menu.

### Select

Use this to select items for authorisations from a list of options and functions on the Menu Activity Selection pop-up.

Select **OK**.

If you have entered **All** or **Revoke** against a user, the system will be updated. The pop-up remains for you to grant or revoke more authorities. Select **OK** to return to the Maintain Menus Selection window.

If you have selected a user, the Menu Activity Selection pop-up will be displayed.

# Menu Activity Selection Pop-up

To display this pop-up, select a user and then select **OK** on the Select User Authorisation pop-up.

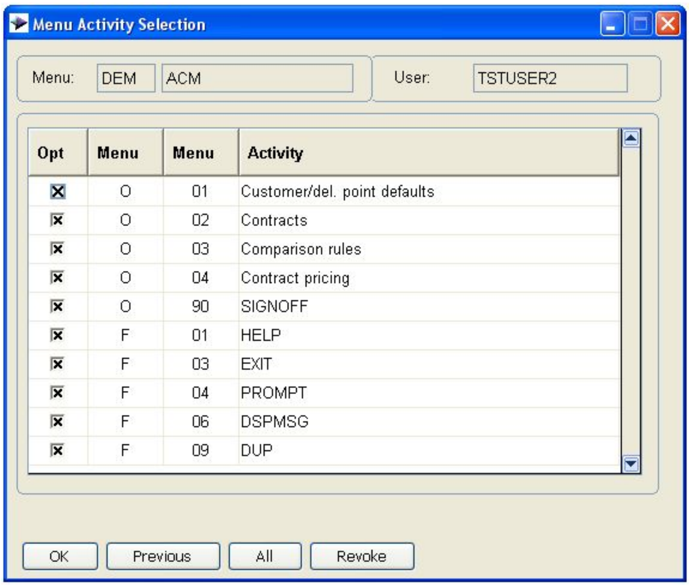
Alternatively, enter **3** against a role and then select **OK** on the Select Role Authorisation pop-up.

Use this pop-up to specify the specific menu options and functions to which a user is authorised.

The pop-up displays a list of all options and functions defined for the menu.

When granting authority to activities within a menu consider the following:

- Granting of authority to a menu option which invokes an application-defined task grants the user authority to that task when using the search facility.
- Granting of authority to an application-defined task on one menu does not mean that authority is automatically granted when the same task is defined on another menu. To use a menu option or function, the user must be granted authority explicitly for that menu.
- If you change an existing menu to incorporate an extra option or function, authority is not automatically granted for this new activity unless the user was originally granted authority to all options and functions on that menu.




## Fields

### Opt

**Check** all the options and functions to which you want this user to be authorised.

Leave this field unchecked to revoke authority to options and functions.

## Functions

### All (F15)

Use this to grant a user or role authority to all options and functions on the menu. The user will be automatically authorised to any new option or function that you add to this menu.

### Revoke (F18)

Use this to revoke the user's authority to all options and functions on the menu.

Select **OK** to return to the Select User Authorisations pop-up.

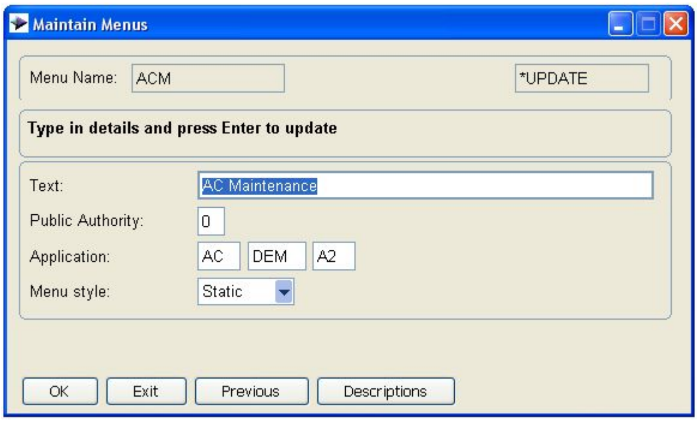
If you select **All (F15)** or **Revoke (F18)**, you are automatically returned to the Select User Authorisation pop-up or the Select Role Authorisations pop-up.

# Maintain Menus Pop-up

To display this pop-up, select **F19=Text** on the Maintain Menus Selection window.

Alternatively, select **OK** on the Maintain Menus Selection window if you are creating a new static menu.

Use this pop-up to enter details about the new menu or amend text details of an existing menu.




## Fields

### Text

Enter a text description of the menu. The text you enter here will automatically appear as the title of a new menu, although you can change it when you are defining the menu window.

The text of the menu is used for the menu title in dynamic menus. Select **Descriptions (F21)** to define language-specific descriptions.

### Public Authority

Use this field to specify whether users need to have authorisation to activities (options and functions) contained within the menu.

Enter one of the following:

0 - If user authorisation is required

1 - If all users have automatic authority to all options and functions on this menu

### Application

You can enter the application to which this menu belongs. This is broken down as follows:

- A two-character application, for example PM for Purchase Management
- A three-digit environment code

This would be blank for the basic installation of standard products.

- A two-digit release level number, for example 03

The application entry made here is used by the commands AMGOLD and AMENVGOLD to identify (along with menu environment) which menu definitions to include with the definition extracted for an application.

It is also used if you are creating a new menu, not based on an existing menu, as the source application for the initial list of tasks.

### Menu Style

Select one of the following:

Static (1) - For a static menu

Dynamic (2) - For a dynamic menu

Use this if the menu is to be dynamically constructed. In this case the maintenance of the static menu layout is unavailable.

Note: Changing a menu between the dynamic and static menu settings will affect the run-time presentation of the menus.

## Functions

### Descriptions (F21)

Use this to set up descriptions for the menu in languages other than the default language. The Select Language pop-up will be displayed.

Select **OK**.

If you are maintaining an existing menu, you are now returned to the Maintain Menus Selection window.

If you are creating a new menu, the Select Menu Options window is displayed.

# Select Language Pop-up

To display this pop-up, select **Descriptions (F21)** on the Maintain Menus Text window.

Use this pop-up to select a language in which you wish to add or maintain a description of the menu.

## Options

### Select

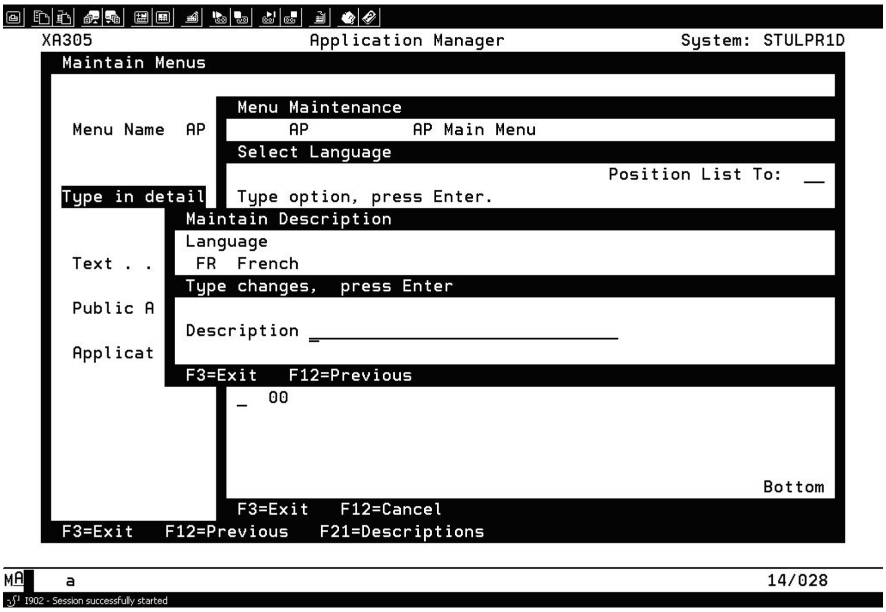
Use this to select the language required.

Select a language to display the Maintain Description pop-up.

# Maintain Description Pop-up

To display this pop-up, select a language on the Select Language pop-up.

Use this pop-up to add or maintain a description of the menu in your chosen language.




## Fields

### Description

Enter the description in your chosen language.

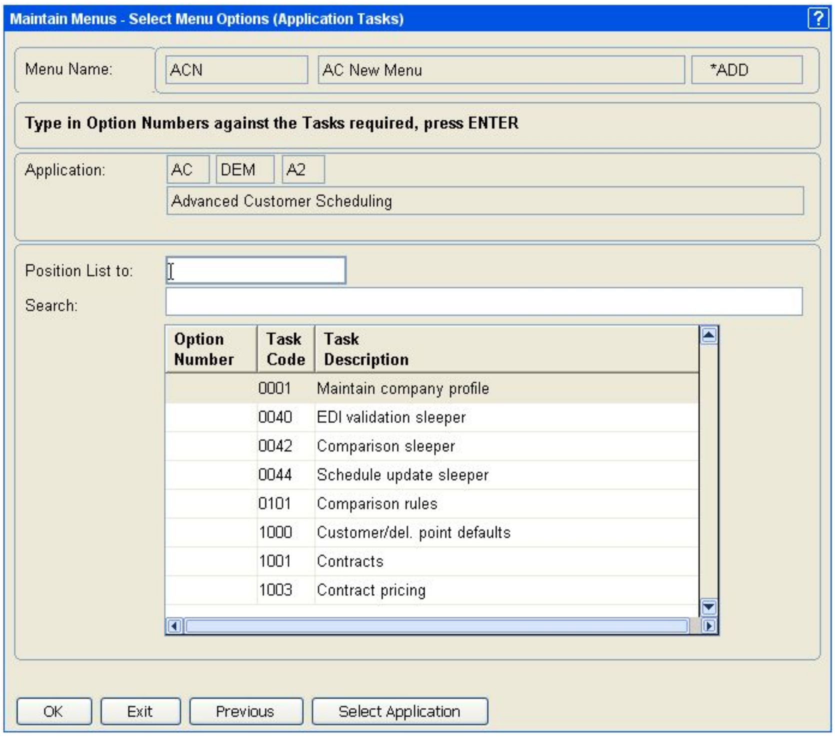
Select **OK** to update the description and return to the Maintain Menus Text window.

# Select Menu Options Window

To display this window, if you are creating a new menu, select **OK** on the Maintain Menus Text window.

Use this window for a quick and simple method of creating new menus. Specify the application tasks you want to appear as options on the menu.

On the next window (the Select Function Keys window), you can specify your functions.




## Fields

### Position List To

You may enter a task number from which to start the displayed list of tasks.

### Search

You can optionally enter a search word. The window will then only display tasks whose descriptions include the search word you enter here.

### Option Number

Enter the number you wish to be the menu option number. This will select the task to be included on your menu. When the menu is created, the first menu column contains options 1 to 12 and the second 13 to 24.

Note: You can assign a maximum of 24 menu options here. You can, however, add more than 24 options by using the Menu Design window.

Note: The Menu Design window is displayed after the Select Functions window.

### Task Description

The task description is automatically displayed. You can modify the description for this specific menu.

## Functions

### Select Application (F15)

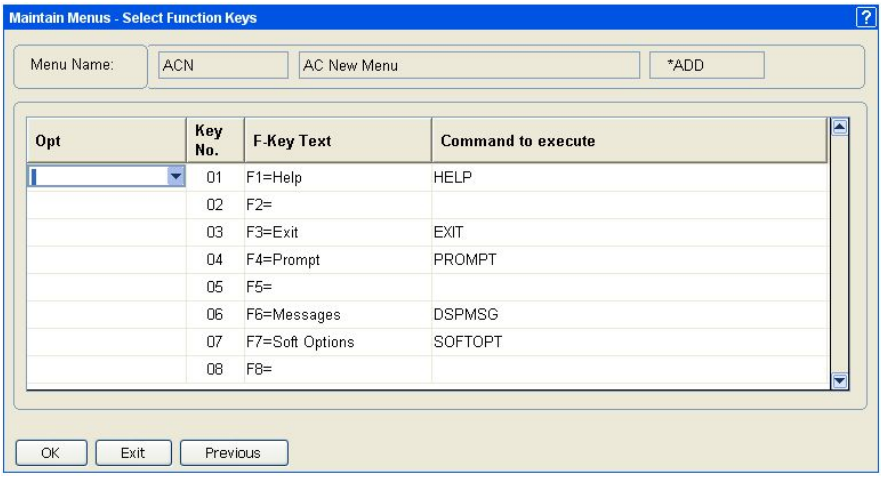
This displays the Select Application pop-up, allowing you to select tasks from another application.

Select **OK** to save your selections and display the Select Function Keys window.

# Select Function Keys Window

This window is displayed automatically, when you select **OK** on the Select Menu Options window.

Select standard function key options to display and be enabled on your window. Designate and name additional functions by adding the required command to be executed.




## Fields

### Option (Opt)

Select one of the following:

Display/Enable - To display the function and enable it

Enable Only - To enable the function without displaying it

### F-Key Text

Enter the text to appear on the menu to describe the function. Where applicable this defaults to the standard function text.

Note: The display for the menu shows only displayable function keys. If the total string is too long for the function key line, the last entries are dropped until it fits.

### Command to Execute

Enter the name of the program or system command you want to be executed when the relevant function is selected. There are certain standard words you can use here.

## Options

### Display/Enable

Use this to display and enable this function on the menu.

**Enable Only**

Use this to enable the function but not display it. For example, if you want to use **F1** to access Help but you do not want to display **F1** on the menu, enter **2** alongside key 01.

Note: You can display a maximum of eight functions using this fast path method. To display additional functions, use the Menu Design window. If you do select more than eight functions here, only the first eight are displayed, although they will all still be enabled.

Tip: To display more functions use **Page Down**.

When you have completed your selections, select **OK**.

The system takes the options you selected on the Select Menu Options window and the functions you specified on this window, and uses them to create a basic menu. This is now displayed on the Menu Design window.

# Menu Design Window (Static)

Note: The painted menu design is not used by Workspace.

To display this window, select **OK** on the Select Functions window.

The Menu Design window is a window on which you design or amend your menu.

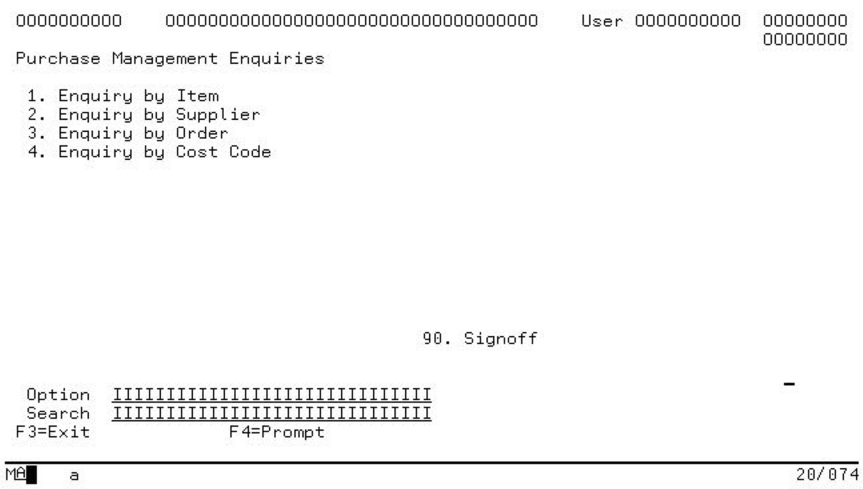
If you have already used the Select Menu Options and Select Functions windows to specify the options and functions on your menu, or if you are maintaining an existing menu, the options and functions will be displayed for you to move or amend as required.

## Menu Literals

For the purpose of language translation, or to meet your company's own standards, you may wish to change the standard text or literals contained in menus.

The majority of these are held in a message file.

Note: Changing the message file will only affect new menus that you create. It will not affect existing menus.




You can use the entire menu window for your own text and fields with the following reservations:

- Row 1, column 1 is a protected area.
- The position of the Option field is pre-set.
- The position of the Search field is pre-set, but you can delete the field if you do not require it.

You will be working with literals (text) and variables. You can do any of the following:

- Place literals on the menu window.
- Place variables on the menu window.

- Specify display attributes for literals and variables on the menu window.
- Delete variables or text.
- Move variables or text.
- Define the way in which you want the system to respond to the options and functions the users can select.

## Functions

These functions are not displayed on the Menu Design window, as they will not be seen by the user. However, they are enabled on the window and can be viewed by selecting **F1**.

### F2

Use this to revert to the version of the menu as displayed at the beginning of the session, before you made any amendments. Use this with care!

### F3

Use this to exit the Menu Design window. The Exit Prompt will be displayed asking whether you want to save or abandon your changes.

### F5

Use this to display the Enter Menu Operation pop-up to allow you to define what happens when an option on your menu is selected. This is referred to as Expert mode and assumes that you have knowledge of the software.

Tip: If you do not have expert knowledge of the software, select **F6**.

### F6

Use this to display the Menu Activity Definition pop-up to allow you to define what happens when an option on your menu is selected. This option assumes that you are a novice with the software and leads you through the available options.

### F8

Use this at any time to save changes to your work. It takes you to the next stage of menu maintenance - the Maintain Menus Operations window. From here you can return to your design with **F12**.

### F10

If you wish to place a reserved word on the menu, for example, Date, select **F10** to display the Select Reserved Word pop-up.

The reserved word is placed on the window at the current cursor position. Therefore you should position the cursor correctly before you select **F10**. However, if you forget to do so, you can move the field once it has appeared on your window.

**F12**

Use this to return to the Maintain Menus window and select another menu to maintain. Any changes made during the session will be lost.

Select **F8** to save the menu design. The Maintain Menus Operations window is displayed.

## Design Features

You can change fields, text and other items on the menu window.

### Placing Text on the Menu Window

You can enter text, for example the menu title or the description of an option. Position the cursor where the text is required and type the text.

New text literal constants to be added to the menu window must be enclosed in apostrophes or single quotation marks. The quotation marks will disappear when you select **OK**; they mark the start and end of a single literal string.

**Warning: Avoid using the Insert, Backspace or Delete keys to add or remove characters. Your menu window is one long record and the whole window will be affected if you do. Instead, place your cursor over the text you want to change and re-type it after you have pressed Enter to accept it.**

Note: Press **Enter** to accept the entered text.

### Placing Variables on the Menu Window

You can place variables for such things as time or date on your menu window. Position the cursor where you want the variable to appear and then enter its name. Alternatively, select **F10** to display the Select Reserved Word pop-up.

### Moving and Deleting Text and Variables

- To delete text or a variable from the menu window, overtype it with spaces or type d in the position preceding the field (known as the attribute byte) and then press Enter.
- To move text or a variable to the left enter < immediately to its left (in its attribute byte) and then press Enter.
- To move text or a variable to the right enter > immediately to its right and then press Enter.
- You can move text or a variable by multiple places by entering the appropriate number of < or > characters and then pressing Enter. Always start in the position immediately to the right or left.
- To move text or a variable to a different area of the window, enter - in the position immediately before the variable. Then enter = in the position immediately before the location to which you want to move it. Then press Enter. You can move a block of variables by entering - before the first variable and another - immediately after the last variable to include in the block.

# Select Field Definition Pop-up

To display this pop-up, enter * in the position immediately preceding the field to be changed on the Menu Design window and then select **OK**.

You can change the colour and display attributes for fields on the menu window. For example, you may wish to underline a field, or show a field in a different colour.

To assign field attributes or colours, enter * in the position immediately preceding the field (the attribute byte) and then press **Enter**. The Select Field Definition pop-up is displayed.

```
 0000000000     00000000000000000000000000000000000     User 0000000000  00000000
                                                                         00000000
 McKenzie Brookes Menu

  1. External Interface Transmissio   *13. BSP Recovery
  2. Unmatched Bank Details            14. Lock Box interactive recovery
  3. Print company profile **redund    15. Copy company utility


                                                 Select Field Definition
                                                  13. BSP Recovery
                                                  Type option, press ENTER
                                                  1=Select

                                                  Attributes . . . . . .  _
                                                  Colour . . . . . . . .  1
                                       90. Signo
                                                 F12=Previous

  Option  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII
  Search  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII
 F1=Help            F3=Exit              F4=Prompt           F6=Messages

MA     b                                                                 16/077
```

## Fields

### Attributes

Enter **1** to display the Select Display Attributes pop-up.

### Colour

Enter **1** to display the Select Colour Attributes pop-up.

Press **Enter** to display the next pop-up.

# Select Display Attributes Pop-up

To display this pop-up, enter a **1** against Attributes on the Select Field Definition pop-up.

You can choose to highlight the menu option in several different ways or you can make it non-display.

```
 0000000000    00000000000000000000000000000000000    User 0000000000  00000000
                                                                       00000000
 McKenzie Brookes Menu

  1. External Interface Transmissio   *13. BSP Recovery
  2. Unmatched Bank Details            14. Lock Box interactive recovery
  3. Print company profile **redund    15. Copy company utility


                                                 Select Display Attributes
                                                  13. BSP Recovery
                                                  Type option, press ENTER
                                                  1=Select Attribute
                                                  Display attribute     Opt
                                                  High intensity. . . .  _
                                                  Reverse image . . . .  _
                                   90. Signo      Column separators . .  _
                                                  Blink . . . . . . . .  _
                                                  Non-display . . . . .  _
  Option  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII          Underline . . . . . .  1
  Search  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII
 F1=Help           F3=Exit           F4=Prom     F12=Previous
MA     b                                                                22/054
```

## Fields

### Option (Opt)

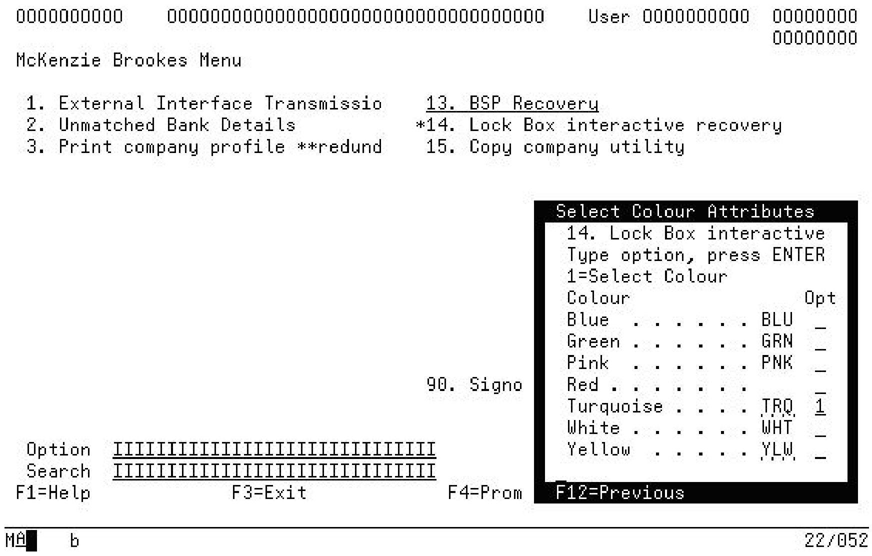
Enter **1** against the attribute you require.

Press **Enter** to see the effects of the attribute.

# Select Colour Attributes Pop-up

To display this pop-up, enter **1** against Colour on the Select Field Definition pop-up.

Use this pop-up to change the colour of text on window.




## Fields

### Option (Opt)

Enter **1** against the colour you require.

Note: Some combinations of colour and display attribute are not available or not effective.

You can change field attributes or colour directly using the following characters. Place them in the position immediately preceding the text or variable and then press **Enter**.

**b** - Blink

**s** - Column separators

**h** - Highlight

**r** - Reverse image

**u** - Underline

You can also change colours directly by putting **c** in front of the field followed by one of the following codes:

**b** - Blue

**g** - Green

**p** - Pink

**r** - Red

**t** - Turquoise

**w** - White

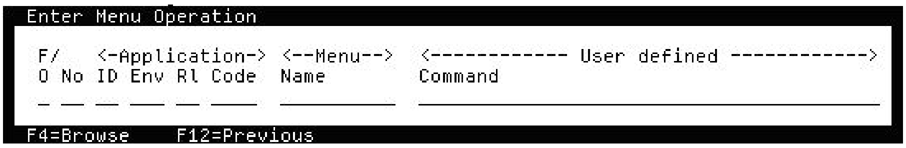
**y** - Yellow

Select the option and press **Enter**. You will be returned to your menu design window, where you will see the effect of the colour attributes.

# Enter Menu Operation Pop-up

To display this pop-up, select **F5** on the Menu Design window.

Use this pop-up to define what happens when an option on your menu is selected. This option assumes that you have expert knowledge of the software. If you do not have expert knowledge of the software, you can select **F6** to display the Menu Activity Definition pop-up, instead of selecting **F5**.




## Fields

### F/O

Specify whether you are defining the response for a menu option or a function key by entering one of the following:

F - To define a function key

O - To define an option

### No

Enter the function key or option number.

## Application

You enter data under the Application heading if you wish the menu option to run an application task. This heading has four separate fields grouped beneath it:

### ID

Enter the application ID (for example, PM for Purchase Management).

### Env

Enter the environment (version) for the application.

### Rl

Enter the release level of the application.

### Code

Enter the code of the application task you wish to process.

An example of all four fields for a Purchase Management enquiry could be:

PM AR1 01 1010

### Menu Name

If you want the menu option to call another menu, enter the name of that menu here.

### User Defined Command

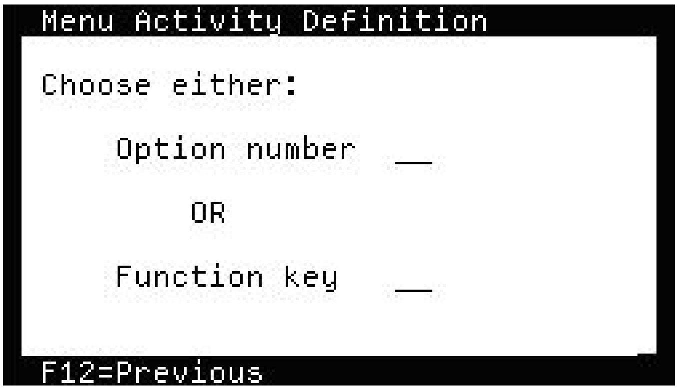
If you want the menu option to run a user-defined command, enter the command here. This could be an IBM command, a WFi Manager command, Work Management command, Application command or a command that you have created.

→ Select **OK** to validate your entries and return to the Menu Design window.

# Menu Activity Definition Pop-up 1

To display this pop-up, select **F6** on the Menu Design window.

Use this pop-up to define what happens when an option on your menu is selected. This option assumes that you do not have expert knowledge of the software. If you do have expert knowledge of the software, select **F5** instead to display the Enter Menu Operation pop-up. You will be able to define activities more quickly that way.




## Fields

### Option Number

If you want to define an option rather than a function key, enter the option number you want to define here.

### Function Key

If you want to define a function key rather than an option, enter the function key number here.

Press **Enter** to display the next window.

# Menu Activity Definition Pop-up 2

To display this pop-up, select either a function key number or an option number and then select **OK** on Menu Activity Definition pop-up 1. The fields are replaced by the three listed below.

```
0000000000   00000000000000000000000000000000000   User 0000000000   00000000
                                                                     00000000
Sales Order Processing Enquiries Menu

Order Enquiries                              Stock Enquiries
 1. Whole order                              11. Stock
 2. Orders by customer                       12. Stock availability
 3. Orders by item
 4. Order cross-reference
 5. Orders awaiting despatch
 6. Completed orders by customer
                                           Menu Activity Definition
Invoice Enquiries                          You have chosen option number 13
 7. Invoice by order number
 8. Invoice by invoice number              Now choose either:
 9. Invoice by customer
10. Invoice by item                          Application defined     1
                                               OR
                                             Menu                    _
                                               OR
Option  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII       User defined            _
Search  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII
                                           F12=Previous
F3=Exit  F4=Prompt  F6=Messages  F12=Previous  F16=Change company  F18=Prints
MA     a                                                                21/037
```

### Application Defined

Enter **1** if you want the option or function key to call an application task.

### Menu

Enter **1** if you want the option or function key to call another menu.

### User Defined

Enter **1** if you want the option or function key to call a user-defined command.

Select **OK** to display Menu Activity Definition Pop-up 3.

# Menu Activity Definition Pop-up 3

To display this pop-up, enter **1** against Application Defined or Menu or User Defined and then select **OK** on Menu Activity Definition Pop-up 2.

If you entered **1** against Application Defined on the previous pop-up, you use this pop-up to specify the task code which is to be defined for the option or function.

If you entered **1** against Menu on the previous pop-up, you use this pop-up to specify the menu which is to be defined for the option or function.

If you entered **1** against User Defined on the previous pop-up, you use this pop-up to specify the command which is to be defined for the option or function.

```
 Menu Activity Definition
 You have chosen option number 5
 to be application defined.

 Now choose :

   Application ID OE
   Environment    ___
   Release level  03
   Task code      1290

 F4=Browse     F12=Previous
```

### Fields

Application Defined

Note: These fields are only displayed if you entered **1** against Application Defined on Menu Activity Definition pop-up 1.

#### Application ID

Enter the application ID (for example, PM for Purchase Management) for the task you want to call.

#### Environment

Enter the environment (version) of the application task you want to call.

#### Release Level

Enter the release level of the application task you want to call.

#### Task Code

Enter the application task code itself.

An example of all four fields for a Purchase Management enquiry could be:

PM ZED 03 110

Menu

Note: This field is only displayed if you entered **1** against Menu on Menu Activity Definition pop-up 1.

### Menu Name

Enter the menu name you want your menu to cal.

User Defined

Note: This field is only displayed if you entered **1** against User Defined on the Menu Activity Definition pop-up 1.

### Operation/Command

Enter the command you want to execute when the user selects the option or function key. This could be an IBM command, a WFi Manager command, Work Management command, Application command or a command which you have created.

## Functions

### Special Words (F4)

Use this to display the Menu Activity Special Words pop-up. This is only available if you are defining an operation or command. If you are setting up a task or a menu, **Browse (F4 )** invokes Select Application/Task or Select Menu.

Select **OK** to accept the changes and return to the Menu Design window.

# Maintain Menus Operations Window

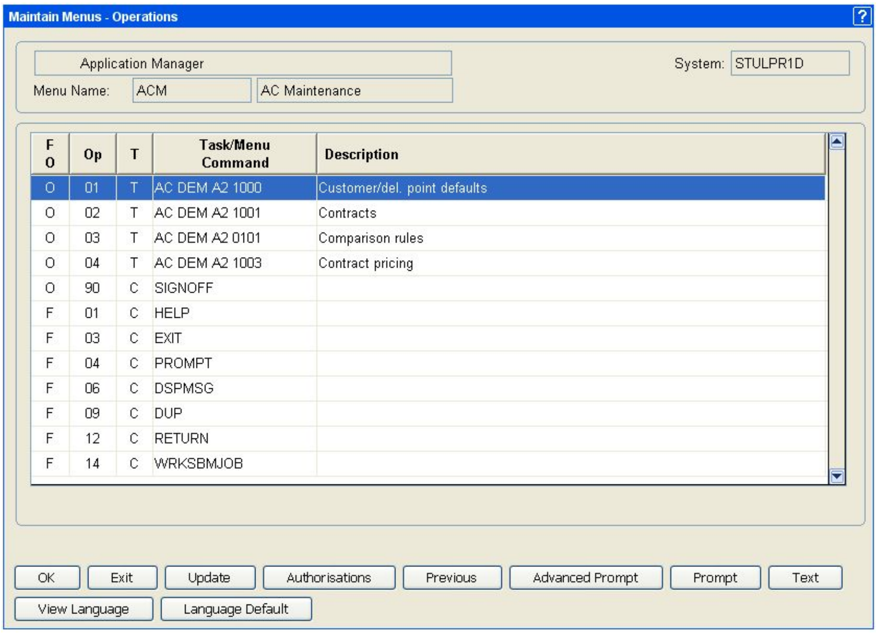
To display this window, select **F8** on the Menu Design window.

Alternatively, select **F16** on the Maintain Menus Selection window.

Menu options are amended and removed using this window.

F16, F22 and F23 will update the menu before proceeding to the appropriate function.

Tip: The Green-on-Black layout allows a maximum of 30 entries for the subtitles; menu options and blank fillers. Whilst more options can be added, from a practical point of view it is recommended that you limit the number of options made available through a single menu.




## Fields

### F O

This field displays one of the following:

F - For a function

O - For a menu option

### Op

This field displays the number of the options and functions set up so far. You can amend the function or option number.

Note: In addition to entering option numbers, you can also have option characters. For example, you could enter **R** in this field for a menu option of R, which takes the user to a Reports menu.

### Type (T)

This field shows whether the function or option is a task (T), menu (M) or command (C).

### Task/Menu Command

This field varies according the Type field.

If it is a task, this field displays the application ID, environment, release level and task code of the task being called.

If it is a menu, this field displays the name of that menu.

If it is a command, this field displays that command. This could be an IBM command, a WFi Manager command, Work Management command, Application command, or a command created by you.

### Description

For menu options, this field displays the text description.

## Options

### Amend

Use this to amend the option or function

### Delete

Use this to delete the option or function

## Functions

### Update (F8)

If you want to save the new or amended menu, but do not yet want to assign user authorities to the menu, select **Update (F8)** to update and return to the Maintain Menus Selection window.

### Authorisations (F9)

Use this to update and save the menu and assign user or role authorities.

### Advanced Prompt (F14)

Use this to enter the details of the function or option in fast path mode, using the Enter Menu Operation pop-up described above.

### Prompt (F15)

Use this to enter details of the function or option in prompted mode, using the Menu Activity Definition pop-ups described above.

### Panel Design (F16) (not displayed)

Use this to return to the Menu Design window described above.

### Text (F19)

Use this to display the Maintain Menus Text window described above.

### View Language (F22)

Use this to allow the descriptions to be viewed in the language selected from the list on the Select Language window.

#### Language Default (F23)

Use this to re-set the descriptions to the default language.

→ Select **OK** to validate your menu.

The system will not update the menu unless you have set up at least one option or function described as a user-defined command with the operation RETURN or EXIT, to provide an exit from the menu.

# Panel Design Window (Dynamic)

```
DCC           Application Manager                       TSTUSER2    01/02/06
                              AUL                                   14:33:47
IN Reports

 10    Master Files                      160    Stock Movements
 20 01 Item/Stockroom                    170 31 Movements audit
 30 02 Descriptions file                 180 32 Movements processed by AFI
 40 03 Item supersessions                190 33 Stock movements
 50 04 Account container tracking        200 34 Negative stock
 60                                      210 35 Negative stock periodic parame
 70    Master Files Audit                220 36 Non-Moving items
 80 11 Item audit                        230 37 Negative Locations
 90 12 Stockroom audit                   240
100                                      250    Stock Analysis
110    Stock Valuation                   260 41 Re-order/overstock
120 21 Stock movements valuation         270 42 Stock availability
130 22 Stock valuation                   280 43 Supply/demand exceptions
140                                      290 44 Rotation factors
150                                      300

Option                                   90.Signoff
Search

F3=Exit  F4=Prompt  F6=Messages  F12=Previous  F16=Change Company
MA     a                  MW                                            05/002
```

The dynamic menu is constructed at run-time using the basic layout above. A standard template menu (21DYNAMIC) is supplied as shown below:

```
_0000000000    000000000000000000000000000000000000    User 0000000000   00000000
                              000                      Role 0000000000   00000000
Dynamic Menu

<---------------------------------------------------------------------------->
|  WARNING: Changing this panel will affect ALL dynamically created menus    |
|     Rows  1 -  2 These can be rearranged. Literals are ignored.            |
|           3      The menu title is retrieved from the menu header.        |
!           4      Not used - provides space between title and options.      |
!           5 - 19 The dynamically built menu options are added here.       |
!                  Do not insert any reserved words in this area             |
!          20      Not used - provides spacing.                              |
!          21 - 22 The option/search details. Reserved words could be        |
!                  added in the spaces, but the existing entries must        |
!                  not be moved.                                             |
!          23 - 24 The function keys appear in this area.                    |
!                  Do not insert any reserved words in this area.            |
!                                                                            |
<---------------------------------------------------------------------------->

 Option  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII   90. Signoff
 Search  IIIIIIIIIIIIIIIIIIIIIIIIIIIIII


MA     a                  MW                                            01/001
```

This menu is supplied as a static layout and must not be converted.

**Row 1** contains the Menu Code, the Company Name, the User ID and the Current Date.

**Row 2** contains the Environment Code, the Role Code (if role processing is in use) and the Current Time.

**Row 3** contains the Menu Description, in the appropriate user language.

**Row 4** is left blank to provide spacing.

**Rows 5-18** contain sub-heading and menu option descriptions in the user's language, as appropriate. If language-specific descriptions are not available, the base language descriptions are used.

**Row 19** is left blank to provide spacing.

**Row 20** allows the entry of options and commands. A standard signoff option is also displayed.

**Row 21** allows available tasks to be searched.

**Row 22** is a separator line.

**Row 23** contains the function keys flagged for display.

All menus have Option/Search literals and input fields. If option 90 is activated for the menu, it always displays on the option line.

Up to 30 entries can be configured for the Green-on-Black menu. This can include options, sub-titles and spacing entries.

The existing literals, options and spacing entries are displayed.

The option descriptions are taken from the menu option overrides or the base menu or task description as appropriate, using standard environment and language drop-through.

If a description has an asterisk (*) on the right hand side, the displayed description is from the task default.

To change the order in which the entries are displayed, change the sequence numbers as required.

Within the menu maintenance, two new categories are included so that sub-headings and/or blank entries can be added to break up the Green-on-Black display.

> Note: Within Workspace the sub-heading feature is available in the menus, but the blank spacers are not.

## Functions

### Exit (F3)

Use this to return to the previous window without update.

### Prompt (f4)

Use this to select available options for this menu; only options not already displayed are available for selection.

### Update (F8)

Use this to apply any changes made.

### Delete (F11)

Use this to delete a sub-title or option by placing the cursor on the entry to be removed and then selecting **F11**.

### Cancel (F12)

Use this to return to the previous window without update.

### Sequence (F14)

Use this to toggle the view to display with/without the sequence numbers.

### Maintain Function Keys (F15)

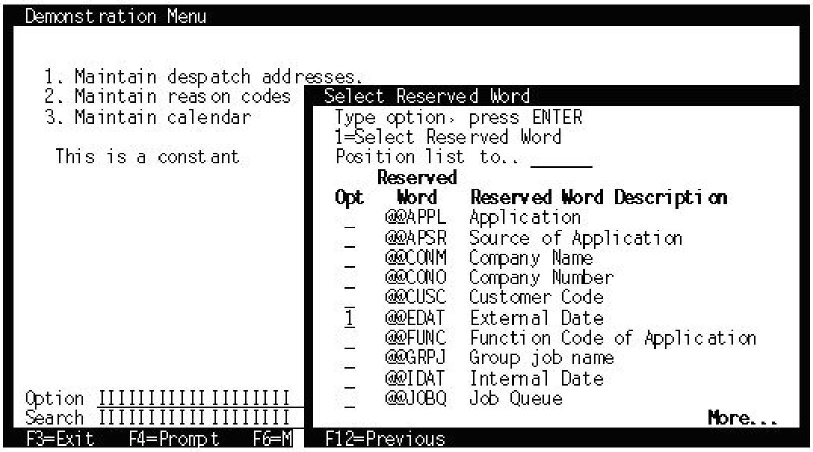
Use this to list the function key details for this menu.

# Select Reserved Word Pop-up

To display this pop-up, select **F10** on the Menu Design window.

After you have selected the field, it appears on the window wherever the cursor was when you selected **F10**. This means you should position your cursor before selecting **F10**. However, you can still move the field once it is on the menu window.

This pop-up displays a list of reserved words (fields) that you can select to appear on your menu. These fields include such information as the company name, today's date, the time, the current application, and so on.




## Fields

### Option (Opt)

Enter **1** to select the reserved word (field) whose information you want to see on the menu.

Select **OK**. The reserved word is displayed as a string of **O**s for output fields or as a string of **I**s for input fields. Each string will be the same length as the field it represents. You cannot change their type; however, you can move them, and set display attributes or colour. See the Select Field Definition Pop-up section.

# Maintain Reserved Words Selection Window

To display this window, select **Maintain Reserved Words (F20)** on the Maintain Menus Selection window.

Use this function to set up and maintain the variables used in menus. These variables are called reserved words, and are fields that contain the sort of information that you might want on your menu - today's date, the time, the current application or company, and so on.

**Warning: Application Manager is shipped with a number of reserved words already defined. Please do not change these. Maintain only those which you wish to set up in addition to those provided.**


## Fields

### Reserved Word

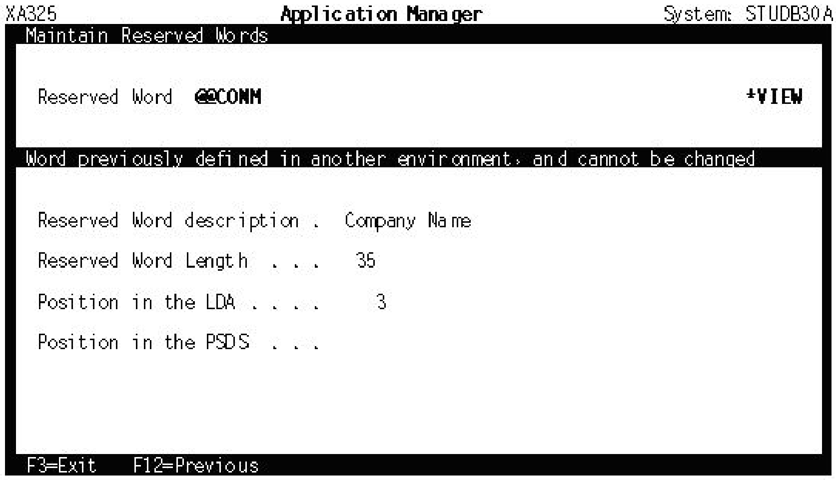
Enter the reserved word that you want to maintain or set up. Reserved words must start with the symbols @@, as these tell the system that this is a reserved word. You can then use a code of up to four characters to identify the reserved word itself.

Select an existing reserved word or enter a new one and then select **OK** to see the Maintain Reserved Words window.

# Maintain Reserved Words Window

To display this window, select an existing reserved word or enter a new one and then press **Enter** on the Maintain Reserved Words Selection window.

Use this window to enter or amend your reserved word.




## Fields

### Reserved Word Description

Enter or amend the description for this reserved word.

### Reserved Word Length

Enter or amend the maximum length of this reserved word.

### Position in the LDA

If the value of the reserved word is held within the LDA (the Local Data Area), enter its start position within the LDA.

### Position in the PSDS

If the value of the reserved word is held within the PSDS (the Program Status Data Structure), enter its start position within the PSDS.

Select **OK** to save your new or amended reserved word. The Maintain Reserved Words Selection window is then re-displayed.

# Dynamic Menu Utility (CRTDYNMNU)

To allow the context-specific menu descriptions to be applied to the menus, a conversion utility is available. This allows a single menu, a range of menus or all menus to be processed.

The tool interrogates the panel layout and identifies menu options, function keys, blank spaces and sub-headings.

Menu options that have already been processed are ignored.

The static panel layout is removed and the menu flagged for dynamic build.

Menu ID (MENU)

Menu Environment (CUSC)

Language (LANG)

Application ID (APPL)

Application Version (VRSN)

Application Release (RLSL)

Processing is always for the nominated language. (Leave the code blank for the standard product language, usually UK English.)

| Conversion | Menu ID | Env | Lang | Appl ID | Vrsn | Rls |
|---|---|---|---|---|---|---|
| Single menu | Y | Y | Y | | | |
| All menus in the menu environment | | Y | Y | | | |
| All applications for the nominated application | | | Y | Y | Y | Y |
| Menus belong to the chosen application in the menu environment. | | Y | Y | Y | Y | Y |
| All menus | | | Y | | | |

Each menu converted will have its static panel removed, be flagged as using dynamic menu build and will have menu option descriptions. Sub-titles and spaces are preserved to ensure that the Green-on-Black layout closely resembles the original. In some cases, because the option area has been fixed in size, some menu options may be dropped.

## Conversion Audit Report

An audit report, showing the original panel layout followed by the new dynamic panel layout plus all of the menu details, is produced. Any menu options that are not shown on the dynamic menu layout are flagged as non-display.

## Role Menus

For role menus, previously shipped without a Green-on-Black panel layout, the command will generate a dynamic panel based on the menu options without sub-titles.

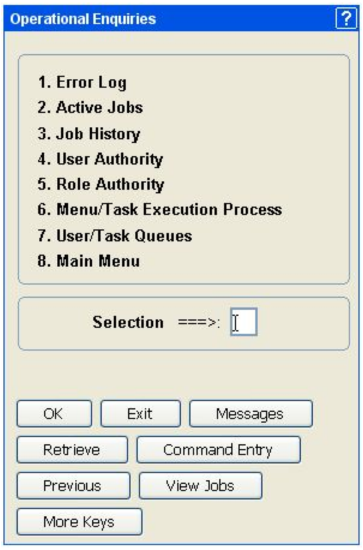
# Chapter 7 - Operational Enquiries

# Introduction to Operational Enquiries

Each application task called from a menu is logged within Application Manager. This information includes the user profile task code, the time at which the task started and the time at which it completed. Thus, Application Manager maintains a complete history of all application tasks. This job log provides the basis for many of these enquiries.

## Operational Enquiries Main Menu

To display this menu, **Operational Enquiries** from the Application Manager Main menu.




### Functions

#### Messages (F6)

Use this to display all messages for the user.

#### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

#### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

#### View Jobs (F14)

Use this to display all jobs for the user.

#### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Application Manager Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

Enter the option you require and then select OK.

Select Main Menu or Previous (F12) to return to the Application Manager Main menu. Select Exit (F3) to leave Application Manager.

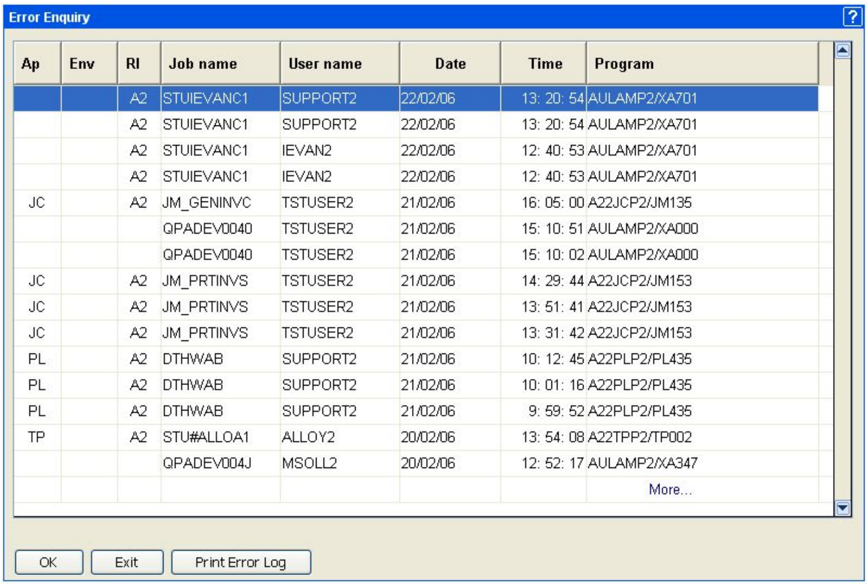
# Error Log

Use this option to enquire on, and print, all application errors logged by Application Manager.

## Error Enquiry Window

To display this window, select **Error Log** from the Operational Enquiries menu.

This window shows the application ID, version code and release level. The job name shows, for interactive tasks, the workstation where the error occurred, or for batch jobs, the batch job name. The window also shows the user, date and time and program and the library of the error.




| Ap | Env | Rl | Job name | User name | Date | Time | Program |
|---|---|---|---|---|---|---|---|
| | | A2 | STUIEVANC1 | SUPPORT2 | 22/02/06 | 13: 20: 54 | AULAMP2/XA701 |
| | | A2 | STUIEVANC1 | SUPPORT2 | 22/02/06 | 13: 20: 54 | AULAMP2/XA701 |
| | | A2 | STUIEVANC1 | IEVAN2 | 22/02/06 | 12: 40: 53 | AULAMP2/XA701 |
| | | A2 | STUIEVANC1 | IEVAN2 | 22/02/06 | 12: 40: 53 | AULAMP2/XA701 |
| JC | | A2 | JM_GENINVC | TSTUSER2 | 21/02/06 | 16: 05: 00 | A22JCP2/JM135 |
| | | | QPADEV0040 | TSTUSER2 | 21/02/06 | 15: 10: 51 | AULAMP2/XA000 |
| | | | QPADEV0040 | TSTUSER2 | 21/02/06 | 15: 10: 02 | AULAMP2/XA000 |
| JC | | A2 | JM_PRTINVS | TSTUSER2 | 21/02/06 | 14: 29: 44 | A22JCP2/JM153 |
| JC | | A2 | JM_PRTINVS | TSTUSER2 | 21/02/06 | 13: 51: 41 | A22JCP2/JM153 |
| JC | | A2 | JM_PRTINVS | TSTUSER2 | 21/02/06 | 13: 31: 42 | A22JCP2/JM153 |
| PL | | A2 | DTHWAB | SUPPORT2 | 21/02/06 | 10: 12: 45 | A22PLP2/PL435 |
| PL | | A2 | DTHWAB | SUPPORT2 | 21/02/06 | 10: 01: 16 | A22PLP2/PL435 |
| PL | | A2 | DTHWAB | SUPPORT2 | 21/02/06 | 9: 59: 52 | A22PLP2/PL435 |
| TP | | A2 | STU#ALLOA1 | ALLOY2 | 20/02/06 | 13: 54: 08 | A22TPP2/TP002 |
| | | | QPADEV004J | MSOLL2 | 20/02/06 | 12: 52: 17 | AULAMP2/XA347 |

### Options

#### Display

Use this to display the full details for an error.

#### Print

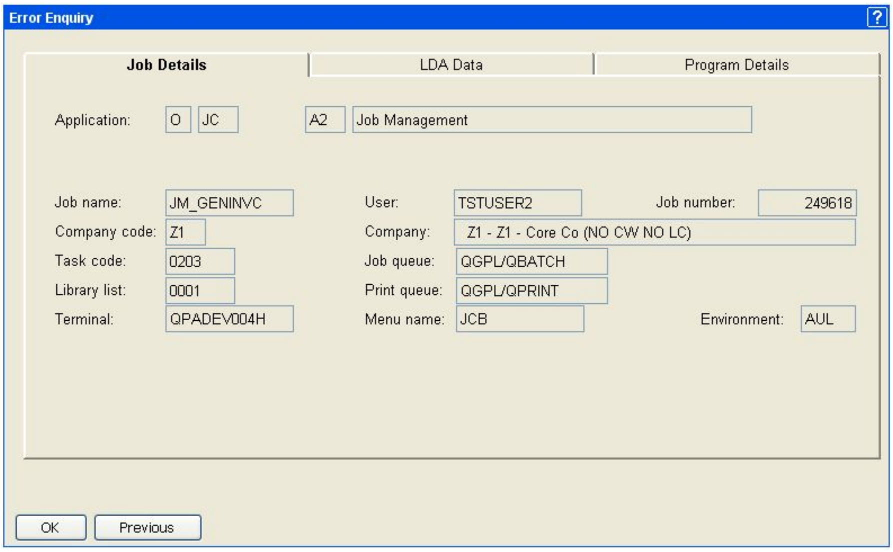
Use this to print the details of the error.

Select **Print Error Log (F23)** for a printout or select **Display** to display the Error Enquiry Details window.

# Error Enquiry Details Window

To display this window, select **Display** against an error on the Error Enquiry window.

This window provides the full details of the error, including the task, the library list, the contents of the LDA and the program name.

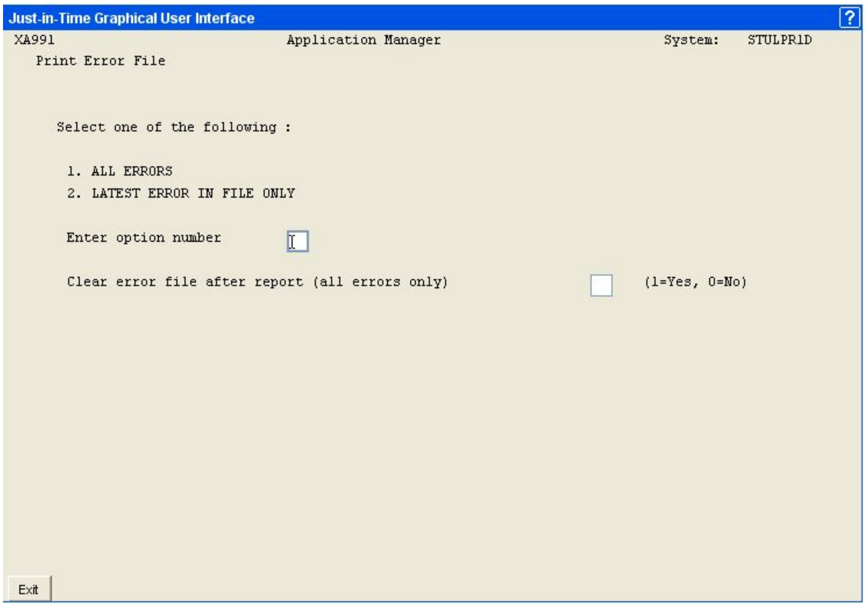



Note: If you wish to clear the error log, select **Print Error Log (F23)**.

# Print Error File Window

If you leave the error file unprinted for a long time (months or years), the number of error records may grow so large that the software cannot list them when you enter the Error Log option.

Instead, a message tells you that there are a large number of errors to print, and if you take the option to print them (**Print Error Log (F23)**), the Print Error File window will be displayed.




## Fields

### Enter Option Number

Enter one of the following:

1 - To print all the errors on file

This gives you the option to clear the file.

2 - To print the most recent error only

### Clear Error File after Report

Enter one of the following:

0 - Not to clear out the error file after printing the report

1 - To clear out the error file after printing the report

You can only select this option if you entered **1** in the Enter Option Number field.

Select **OK** to print the report, and to clear the file if you have requested this.

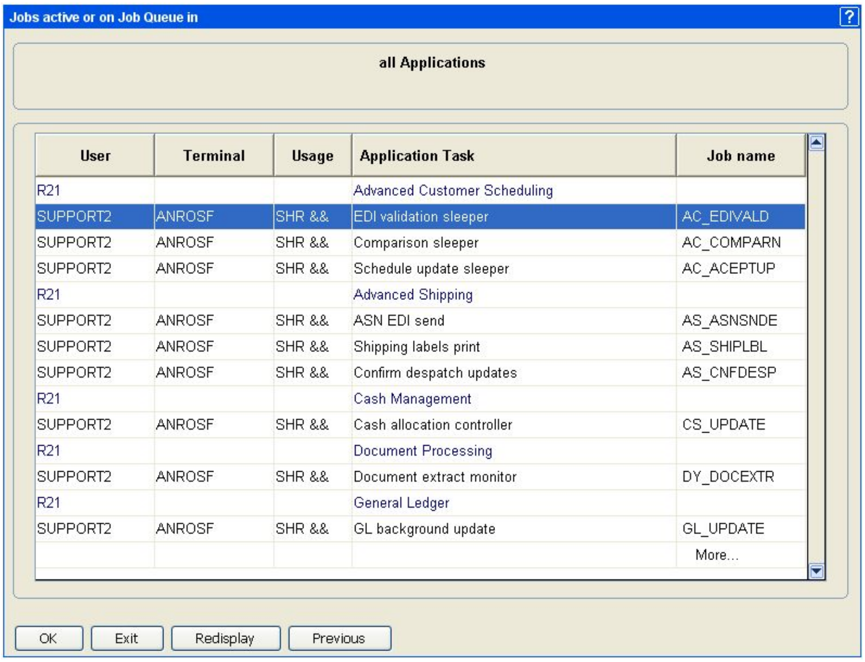
# Active Jobs

This enquiry displays a list of any current jobs and their users.

## Jobs Active Enquiry Window

To display this window, select **Active Jobs** from the Operational Enquiries menu.

This window displays a list of all the jobs that are either active or waiting on job queues within those applications supported by Application Manager.




### Fields

#### User

This field identifies the user who is signed on to the application.

#### Terminal

If you are looking at an interactive task, this field displays the workstation at which the user is signed on. If you are looking at a batch job, this field displays the workstation from which the job was submitted.

### Usage

This field describes the exclusivity of use of the company or system which this user is using, and shows the company, if applicable, to which the user is signed on.

SHR xx is shared usage of company xx, allowing any other shared usage function to take place within this application.

SHn xx indicates shared use of company xx by a function with share class n. Any other function with a share class of n, or SHR usage, may be used. Any function with a share class other than n will be prohibited from use.

SHR && indicates that the user is performing a task which does not require company validation.

EXC xx indicates exclusive use of company xx, not allowing other functions to take place in company xx, but allowing any function within other companies.

EXC SYS is exclusive use of this application. No other activity may take place within this application.

Note: For a more detailed explanation of share classes, see the Maintain Tasks section.

### Application Task

This field displays a description of the task.

### Job Name

This field is blank for interactive jobs. It displays the job name of a submitted batch job. Entries displayed on the list are grouped by application.

## Options

### Select

Use this to display full details of the job.

**Messages**

Use this to send a message to the workstation on which the job is running.

Select **Exit (F3)** to leave the option or **Previous (F12)** to return.

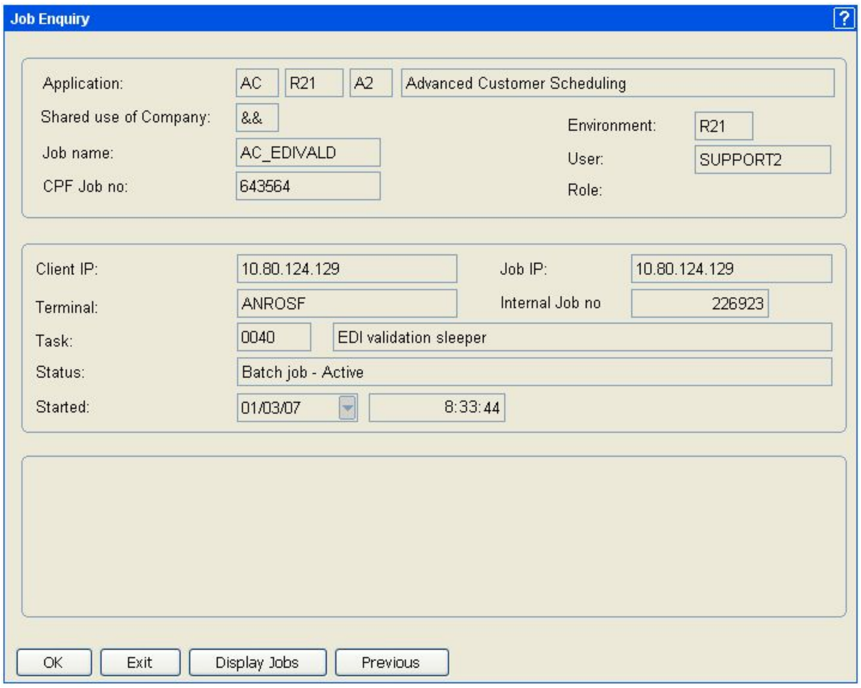
Select a job to display the Job Enquiry window.

# Job Enquiry Window

To display this window, select a job on the Jobs Active Enquiry window.

Enquiry details on the job include:

- The application within which the job is running and the exclusivity of use of the company or system
- The job name, if it is a batch job
- The user performing the task, or for a batch job, the user who submitted the job
- The unique job number assigned by OS/400 to this job
- The workstation at which the user is signed on, or in the case of a batch job, from which the job was submitted.
- The unique job number assigned by Application Manager to this job
- The task code and description of the job
- The status of the job
- The date and time when the job was started




## Functions

Note: Providing the job has not terminated abnormally, you can use **Display Jobs (F7)** to enter the IBM WRKJOB command for this job.

### De-Allocate (F13)

If this job has terminated abnormally, Use this to de-allocate it. This will release any exclusivity allocation on the job or menu and will allow user access.

Select **Exit (F3)** to leave the option.

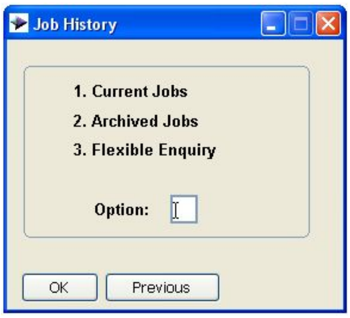
# Job History

Use this option to enquire on jobs that have been completed.

## Job History Pop-up

To display this pop-up, select **Job History** from the Operational Enquiries menu.

You can enquire on current jobs, archived jobs or any jobs since the last Application Manager day end.




### Fields

#### Option

Enter one of the following:

1 - To display current jobs

2 - To display archived jobs

These are completed jobs, cleared from the live files by the Application Manager day-end routines.

3 - To run a flexible enquiry

You use this to enquire on those jobs that have been run within Application Manager since the last Application Manager day-end was run, using your own selection criteria.

Select the required option and then select **OK**.

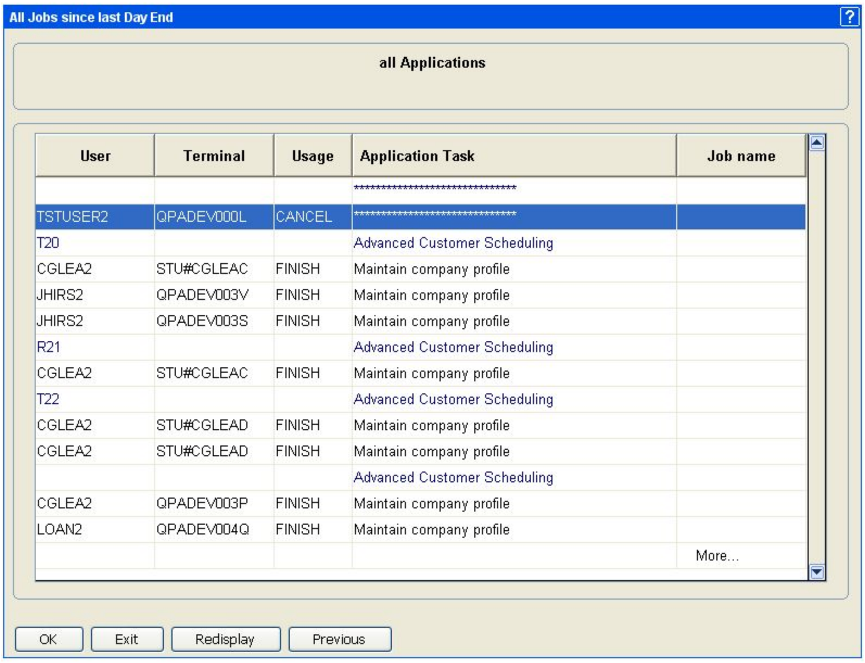
# All Jobs since Last Day End Window

To display this window, enter **1** and then select **OK** on the Job History pop-up. This displays a list of jobs which have been run under the control of Application Manager since the last day-end.

Alternatively, you can enter **3** and then select **OK** on the Job History pop-up and then make a selection on the Flexible Job Enquiry window.

For each job, this window displays the user and workstation and describes the task taking place. For batch jobs, the job name is also displayed.

When you run the Application Manager day-end routines, this history file is cleared down and the detail is archived off to another file, so you only see current detail on this window.




## Options

### Select

Use this to display more details on the job.

**Messages**

Use this to send a message to workstation on which the user is running the job.

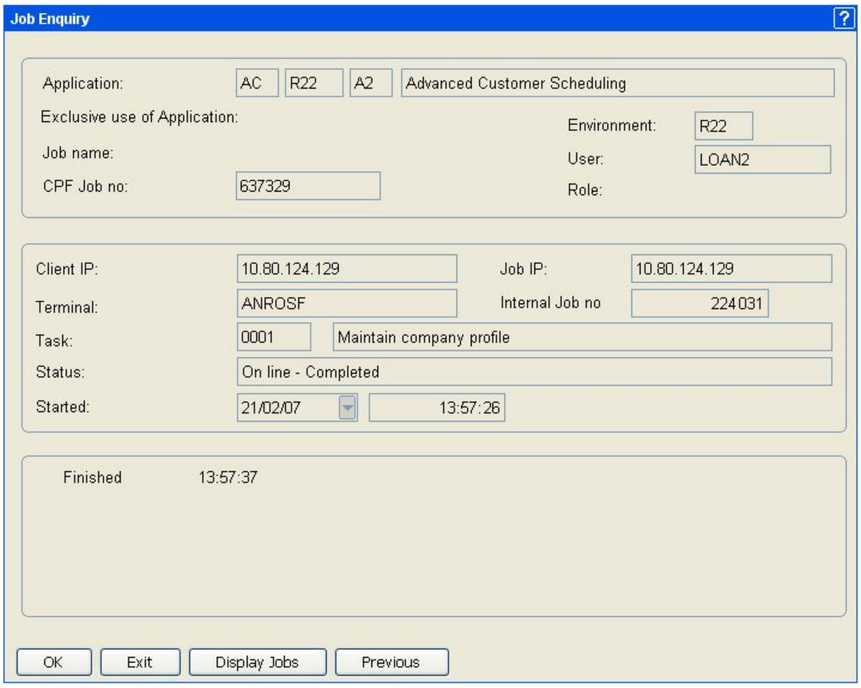
Select a job to display the Job Enquiry Current Details window.

# Job Enquiry Current Details Window

To display this window, select a job on the All Jobs Since Last Day End window.

This window displays, for the selected job:

- The application within which the job is running and the exclusivity of use of the company or system
- For batch jobs, the job name
- The user running the job, or for a batch job, the user who submitted the job
- The unique job number assigned by OS/400 to this job
- The workstation of the user, or for a batch job, from which the job was submitted
- The unique job number assigned by Application Manager
- The task code and description of the job
- The status of the job
- The start and finish date and time




## Functions

### Display Jobs (F7)

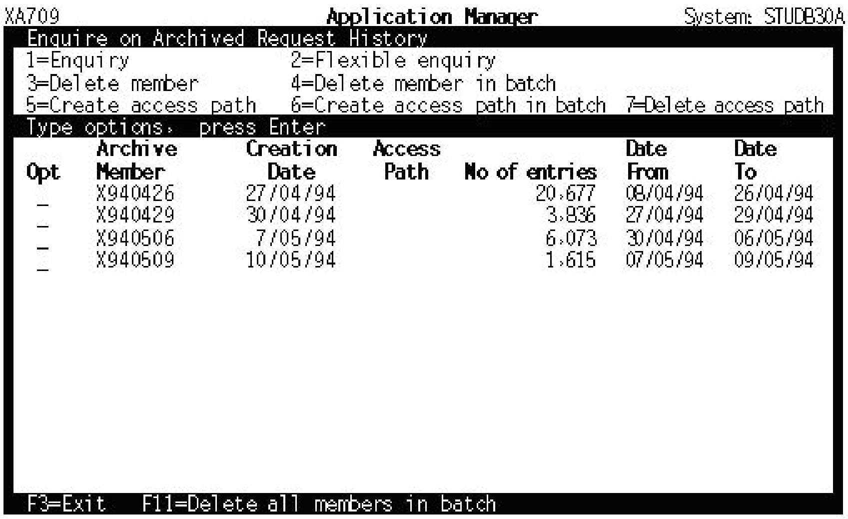
This can be used to take you into the standard IBM Display Job menu, with options to display every aspect of a job such as status, attributes, job queue details, etc.

Select **Exit (F3)** to leave the option.

# Enquire on Archived Request History Window

To display this pop-up, select option **2** and then select **OK** on the Job History pop-up.

Use this option to enquire on completed jobs, cleared from the live files by the Application Manager day-end routines. (See the Maintain Applications chapter and the Day-End Parameters section).




## Fields

### Option (Opt)

Enter one of the following:

1 - To enquire on jobs archived into this member

Note: An access path must exist for the selected member before you can attempt the enquiry.

2 - To select the jobs within the member which you would like to see displayed

The operation of the flexible enquiry for an archived member is the same as for current members; this is described later in this chapter.

3 - To delete a member totally from the system

No more enquiries will be available on jobs in this member. This option deletes the member interactively, and so will prevent any other work from taking place at the window until the task has finished.

4 - To flag a member for batch deletion

All the members you select are flagged with the letter T. When you want to run the deletion, select **F11=Delete All Members in Batch** to submit a batch job.

5 - To create an access path for this member to allow for an enquiry

This option creates the access path interactively, and so prevents any other work from taking place at the window for a short time.

6 - To create access paths for several members at once by submitting a batch job

You must wait for the job's successful completion before making any enquiries.

7 - To delete an existing access path

This improves the system storage overheads associated with Application Manager.

Note: Once an access path has been deleted, it must be re-created by using **5** or **6** before you can make further enquiries on that member.

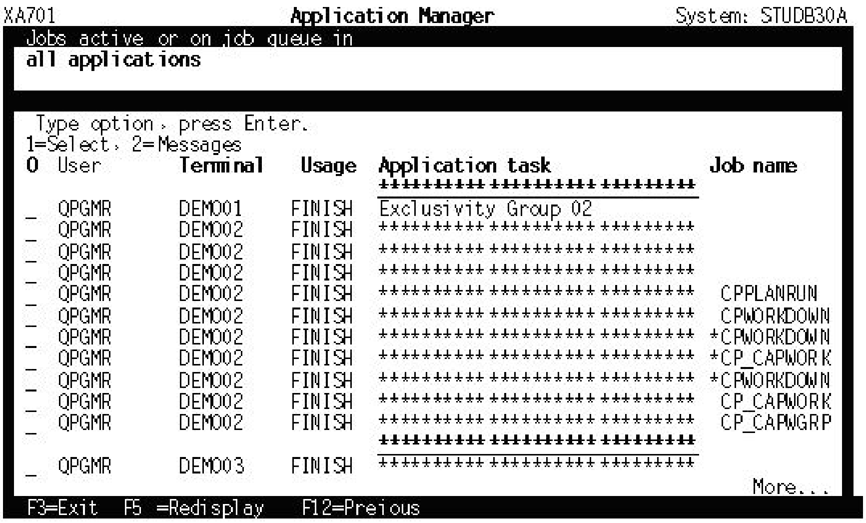
Tip: You should periodically delete old members from the file.

Enter **1** against an archived member and then select **OK** to display the Jobs Active or on Job Queue window.

# Jobs Active or on Job Queue Window

To display this window, enter **1** against an archived member on the Enquire on Archived Request History window.

This window displays the terminal, usage and task for the selected job. For batch jobs, it also displays the job name.




## Fields

### Option (O)

Enter one of the following:

1 - To display more details for the job

2 - To send a message to the user

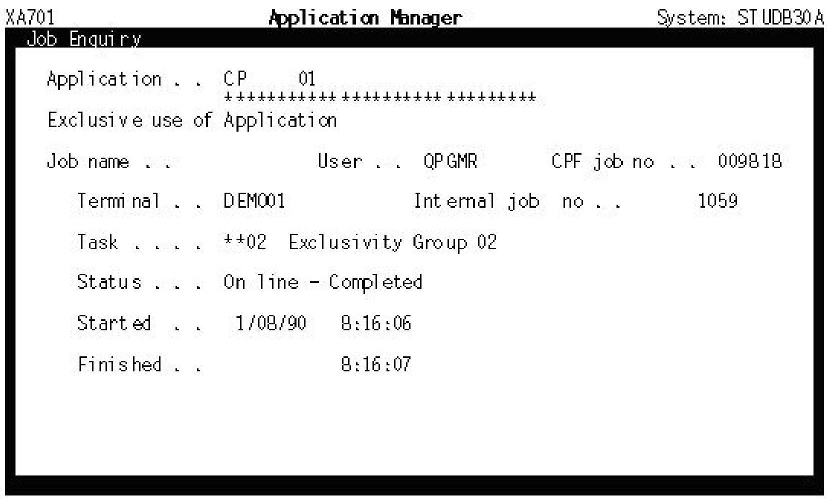
Enter **1** against a job and then select **OK** to display details of a selected job on the Job Enquiry Archived Job Selected Details window.

# Job Enquiry Archived Job Selected Details Window

Enter **1** against a job on the Jobs Active or on Job Queue window to display details for a selected job.

This window displays, for the selected job:

- The application within which the job is running and the exclusivity of use of the company or system
- For a batch job, the job name
- The user running the job, or for a batch job, the user who submitted the job
- The unique job number assigned by OS/400 to this job
- The workstation of the user, or for a batch job, from which the job was submitted
- The unique job number assigned by Application Manager
- The task code and description of the job
- The status of the job
- The start and finish date and time




## Functions

### F5=Refresh

Use this to refresh the window with current details.

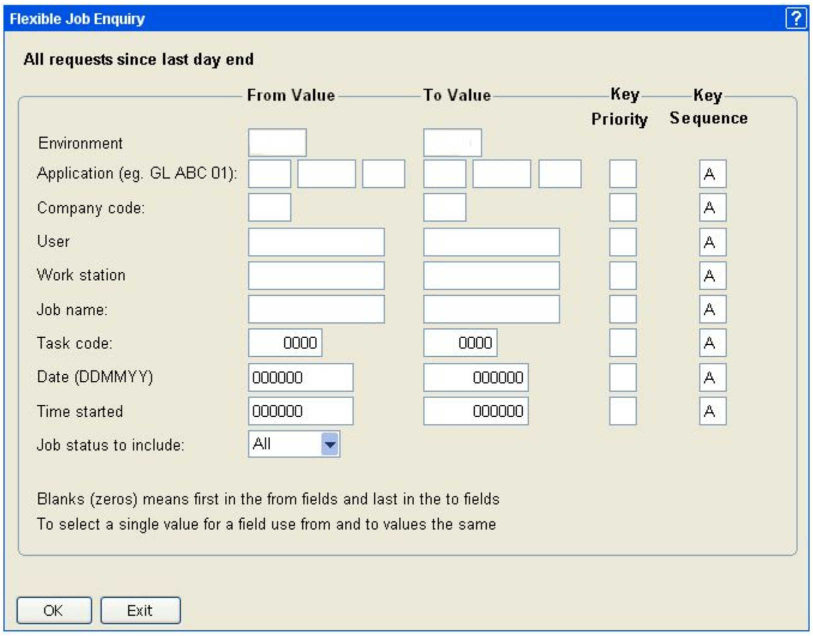
Select **Exit (F3)** to leave the option.

# Flexible Job Enquiry Window

To display this window, select option **3** from the Job History pop-up.

Use this window to select the jobs which have been run within Application Manager since the last Application Manager day-end.

You can specify a range for any of the parameters displayed and sequence the jobs by entering a number from **1** to **6** in the Key Priority column.




## Fields

### From Value

Enter the start of the range you want to select. Leave this field blank to select from the beginning.

### To Value

Enter the end of the range you want to select. Leave this field blank to select up to the end. Set this field to the same as the From Value field to choose a single value.

### Key Priority

For each selection range you use, you can assign a priority. This controls the sequence in which the jobs will be displayed. For example, if you select an application range and give it a key priority of **1**, then a user range and give it a priority of **2**, the jobs selected will be displayed by user within application sequence.

### Key Sequence

Enter one of the following:

A - To display selected jobs in ascending order

D - To display selected jobs in descending order

All of these fields can be filled in against the following:

### Environment

Choose an environment, range of environments or all environments.

### Application

Choose an application, range of applications or all applications.

### Company Code

Choose a company, range of companies or all companies.

### User

Choose a user, range of users or all users.

### Work Station

Choose a work station, range of work stations or all work stations.

### Job Name

Choose a job name, range of job names or all jobs.

### Task Code

Choose a task, range of tasks or all tasks.

### Date

Choose a date, range of dates or all dates. Use DDMMYY format.

### Time Started

Choose a time, a range of times or all times.

### Job Status to Include

Select one of the following:

All (0) (default) - To include all jobs that fulfil the other selection criteria, regardless of their status

Active (1) - To include only active jobs

Finished (2) - To include only finished jobs

Select **OK** to display a list of all jobs satisfying the selection criteria. This is displayed on the All Jobs Since Last Day End window.

# User Authority

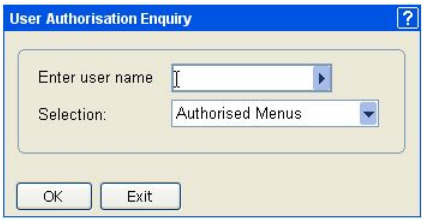
Use this enquiry to display the Application Manager menus and tasks to which a user is authorised. For authorised menus, you can also display the menu image and the options or functions the user can use from that menu.

You can also use this enquiry to see which companies are authorised within any selected application.

## User Authorisation Enquiry Window

To display this window, select **User Authority** from the Operational Enquiries menu.

You can enquire on user access authorisation to menus, tasks or companies in installed applications.




### Fields

#### Enter User Name

Enter the ID of the user whose authority you want to enquire on.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

#### Selection

Select one of the following:

Authorised Menus (1) - To list the menus to which the user is authorised

Authorised Tasks (2) - To list the application tasks to which the user is authorised

Authorised Companies (3) - To list the companies to which the user is authorised within a selected application

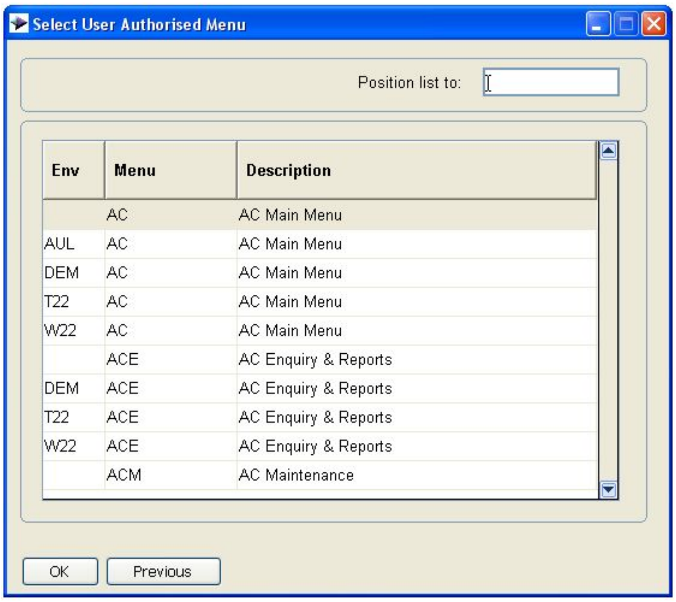
Authorised Roles (4) - To list the roles to which the user is authorised

Make your selections and then select **OK** to display pop-ups for the options chosen in the Selection field.

# Select User Authorised Menu Pop-up

To display this pop-up, select **Authorised Menus** on the User Authorisation Enquiry window.

You can view a selected menu.




## Options

### Select Menu

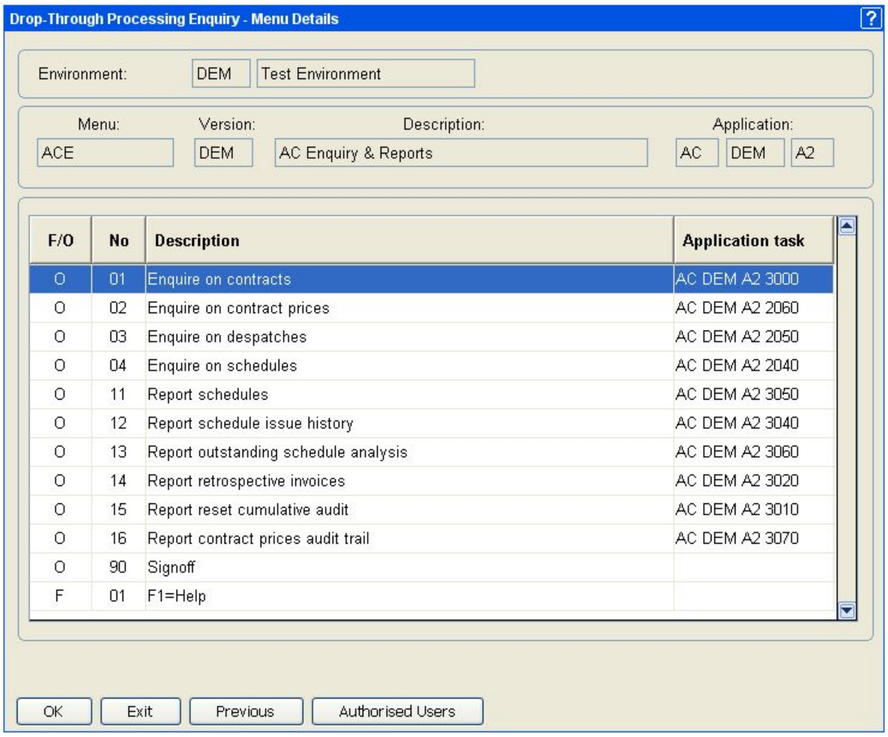
Use this to display the Select User Authorised Menu Details window.

Use the **Select Menu** option to display the Select User Authorised Menu Details window.

# Select User Authorised Menu Details Window

To display this window, select **Select Menu** against a menu on the User Authorised Menu pop-up.

You can view the options and functions used on the menu.




## Options

### Select

Use this to display the Task Details window.

Note: This option is only valid for tasks. It is also valid in GOB for menus in which case the Menu Design window is displayed.

### Library List

Use this to display the Specify User pop-up so that the library list for that user and task can then be displayed.

### Queues Enquiry

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

## Functions

### View Menu (F13)

Use this to display the Menu Design window (see **Maintain Menus** from the Application Manager Main menu).

Note: This function is only valid in GOB.

### Authorised Users (F14)

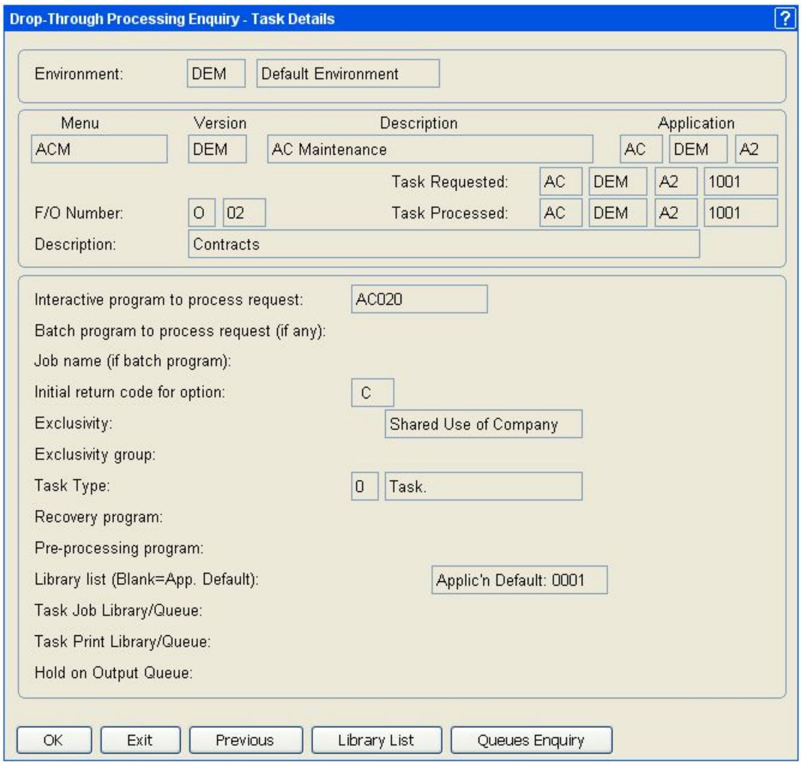
Use this to display the Users Authorised to this Menu pop-up.

Select the option you require to display the next window.

# Task Details Window

To display this window, select a task on the Select User Authorised Menu Details window.

You can view the task details on this window.




## Functions

### Library List (F17)

Use this to display the Specify User pop-up so that the library list for that user and task can then be displayed.

### Queues Enquiry (F20)

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

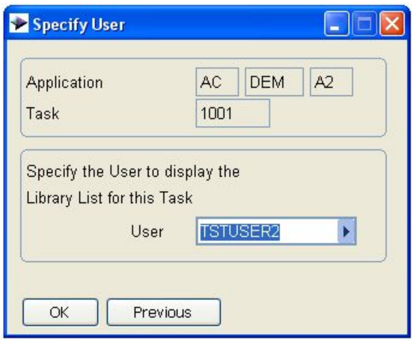
Select the function you require or select **Exit (F3)** to leave the option or **Previous (F12)** to return to the previous window.

# Specify User Pop-up

To display this window, select **Library List** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Library List (F17)** on the Task Details window.

Enter the user required on this pop-up.




## Fields

### User

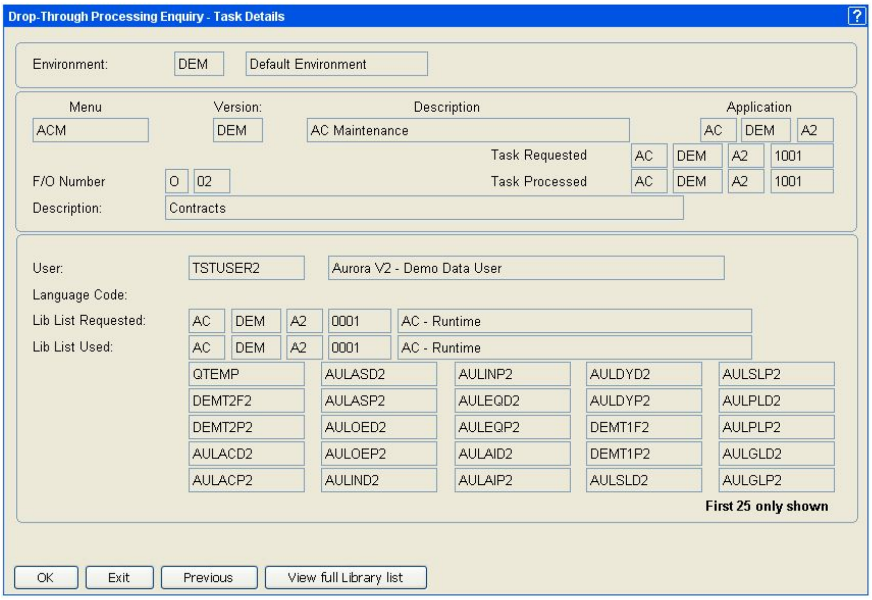
Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

Enter or select a user profile and then select **OK** to display the Library List window.

# Library List Window

To display this window, enter or select a user profile and then select **OK** on the Specify User pop-up.

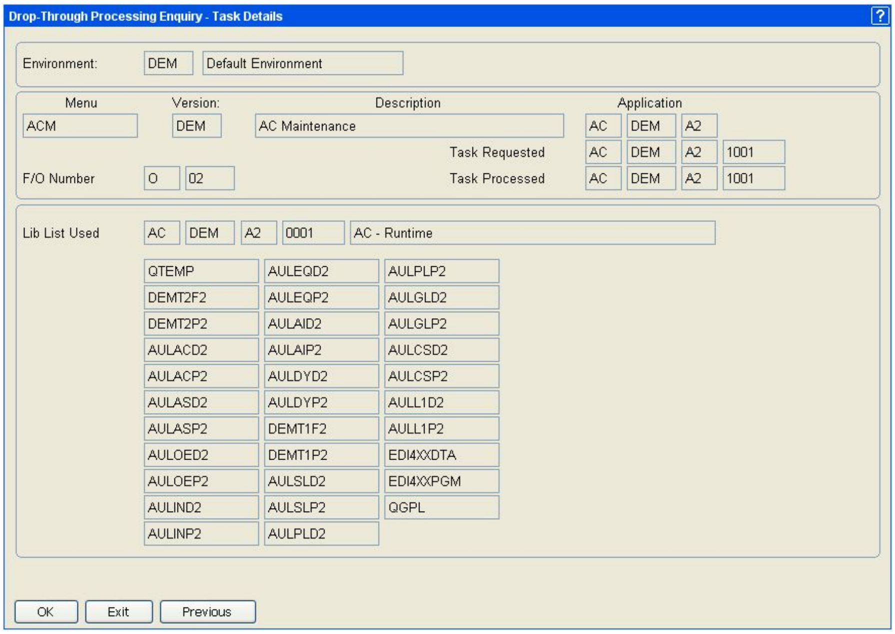



Only the first 25 libraries in the library list are shown. Select **View Full Library List (F15)** to view the Full Library List window if the library list has more than 25 entries.

Otherwise select **Exit (F3)** to leave the task or **Previous (F12)** to return.

# Full Library List Window

To display this window, select **View Full Library List (F15)** on the Library List window.




Select **Exit (F3)** to leave the task or **Previous (F12)** to return.

# Specify User & Company Pop-up

To display this window, select **Queues Enquiry** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Queues Enquiry (F20)** on the Task Details window.

Enter the user and company required on this pop-up.


## Fields

### User

Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

### Company

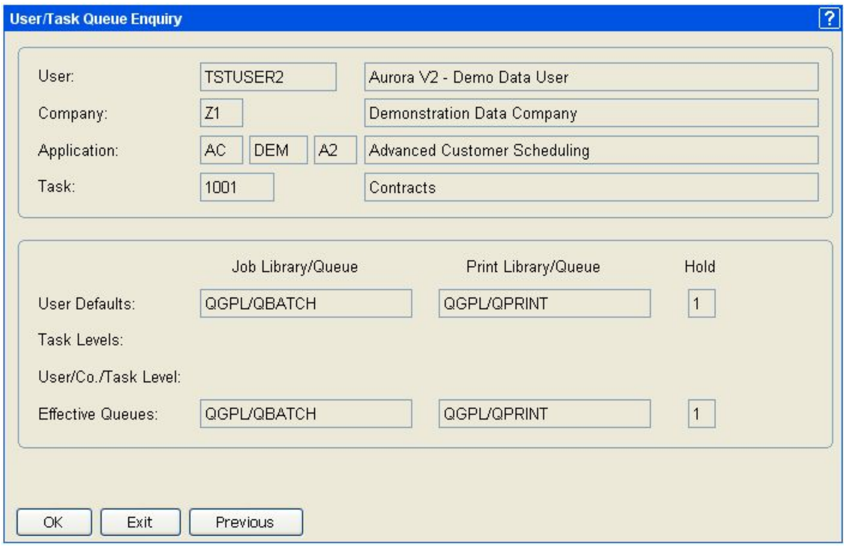
Enter the required company.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Enter or select a user profile and company and then select **OK** to display the User/Task Queue Enquiry window.

# User/Task Queue Enquiry Window

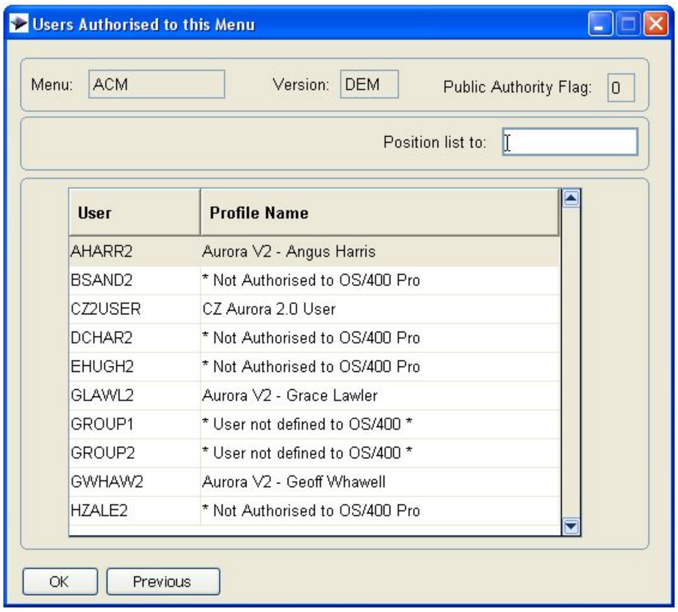
To display this window, enter or select a user profile and company and then select **OK** on the Specify User & Company pop-up.




Select **Exit (F3)** to leave the option or **Previous (F12)** to return to the previous window.

# User Authorised to this Menu Pop-up

To display this window, select **Authorised Users (F14)** on the Select User Authorised Menu Details window.

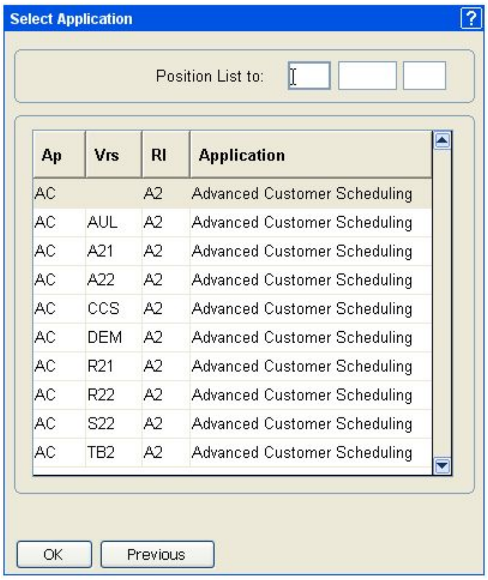



Select **OK** or **Previous (F12)** to return to the previous window.

# Select Application Pop-up

To display this pop-up, select **Authorised Tasks** on the User Authorisation Enquiry window.

Use this window to select applications to view user authorisation.




## Fields

### Position List To

Use this to position the list of applications at the entered value.

## Options

### Select

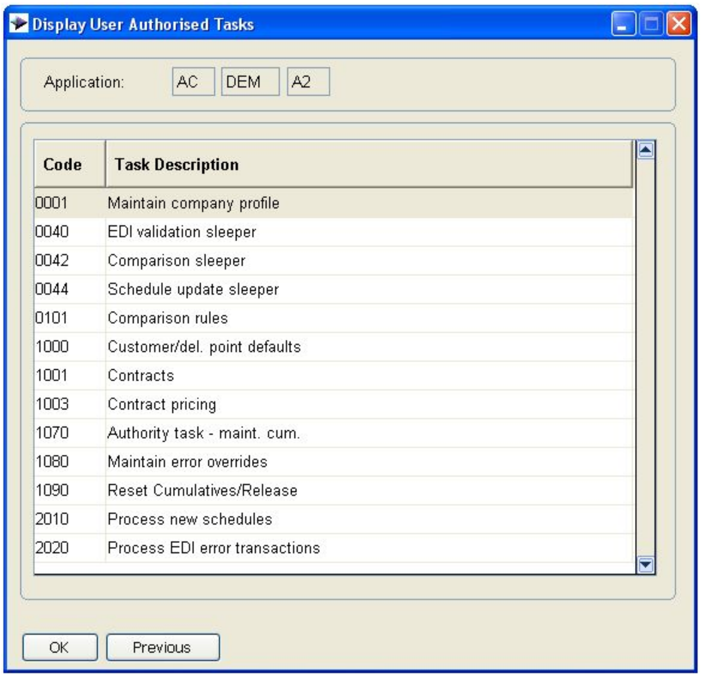
Use this to select the required application.

Select the required application. A window is displayed which shows all the application tasks to which this user is authorised.

# Display User Authorised Tasks Pop-up

To display this pop-up, select the required application on the Select Application pop-up.

All of the tasks to which the user is authorised are displayed for your information.

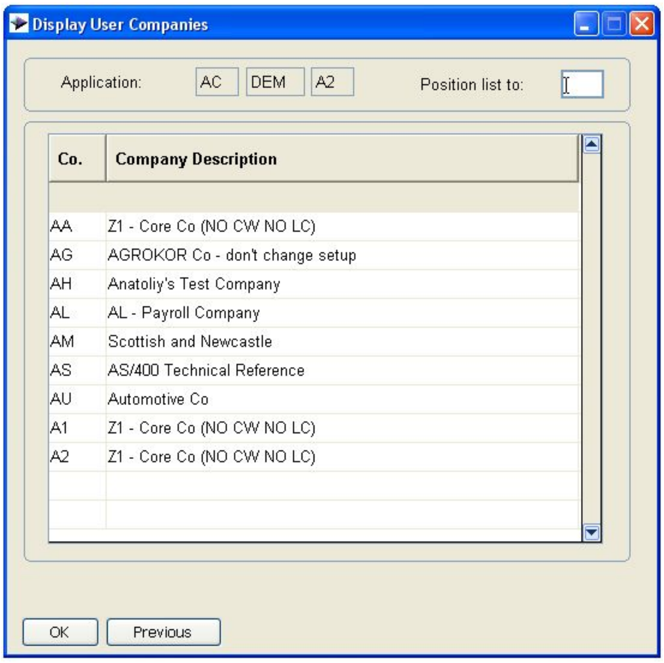



Select **Previous (F12)** to return to the previous window.

# Display User Companies Pop-up

To display this pop-up, select **Authorised Companies** on the User Authorisation Enquiry window and then select an application on the Select Application pop-up.

All of the companies to which the user is authorised in the selected application are displayed for your information.

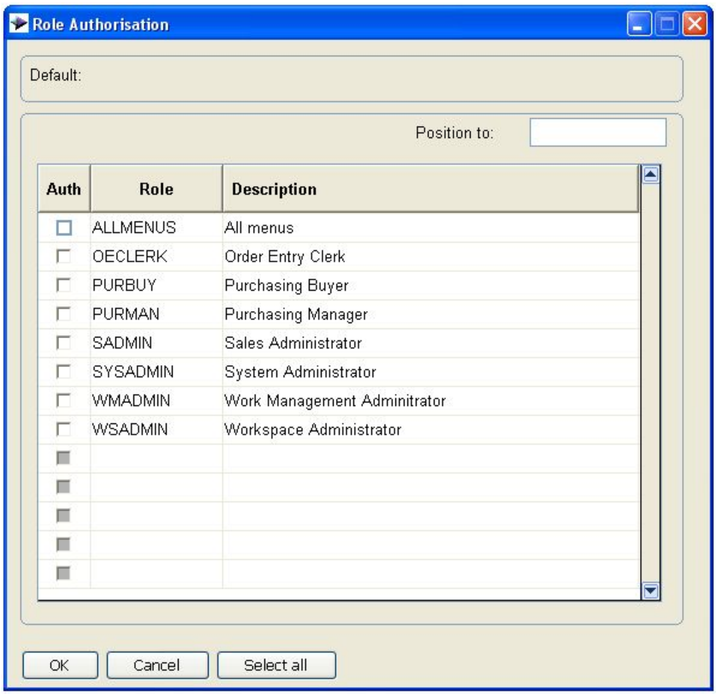



Select **Previous (F12)** to return to the previous window.

# Authorised Roles Pop-up

To display this pop-up, select **Authorised Roles** on the User Authorisation Enquiry window.

Use this pop-up to view the roles to which the user is authorised.




## Fields

### Position To

Use this to position the list of roles at the entered value.

### Auth

Check this field to display the Role Authorisation Enquiry window.

## Functions

### Select All (F15)

Use this to select all roles.

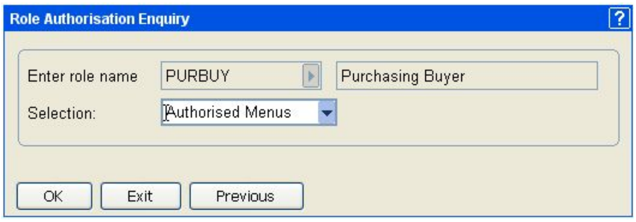
**Check** the Auth field against a role to view the Role Authorisation Enquiry window.

If more than one role is selected, the Role Authorisation Enquiry window will be displayed for each in turn. To move to the next role, select **Previous (F12)** on the enquiry window.

# Role Authorisation Enquiry Window

To display this pop-up, select a role on the Authorised Roles pop-up.

Use this pop-up to display the role to which this user is authorised.




## Field

### Selection

Select one of the following:

Authorised Menus (1) - To list the menus to which the role is authorised

Authorised Tasks (2) - To list the application tasks to which the role is authorised

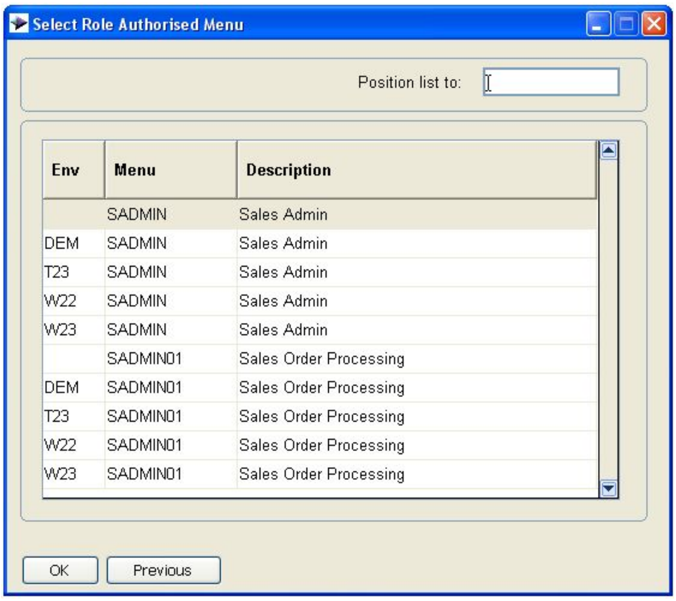
Authorised Users (3) - To list the users that are authorised to the role within a selected application

Make your selection and then select **OK** to display pop-ups for the options chosen in the Selection field.

# Select Role Authorised Menu Pop-up

To display this pop-up, select **Authorised Menus** on the Role Authorisation Enquiry window.

You can view a selected menu.




### Position list To

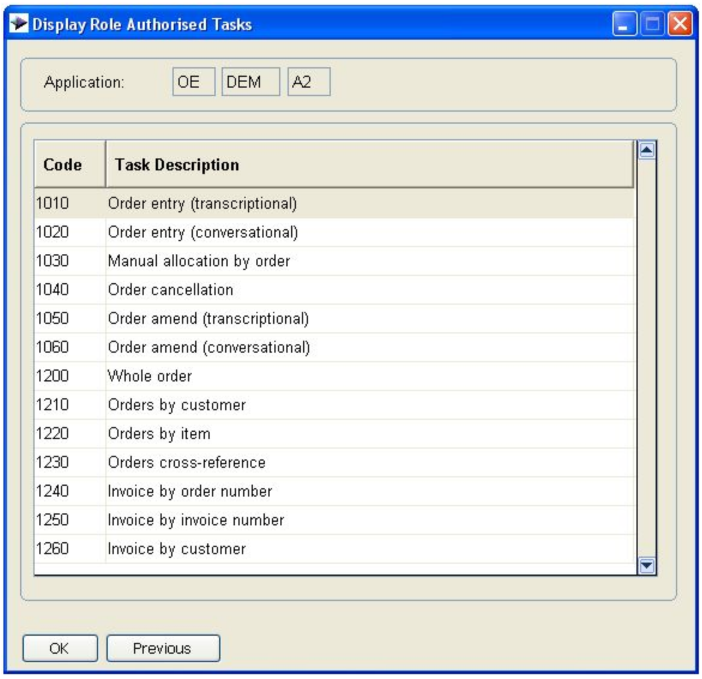
Use this to position the list of menus at the entered value.

Use the Select Menu option to display the Select User Authorised Menu Details window (see above for details).

# Display Role Authorised Tasks Pop-up

To display this pop-up, select Authorised Tasks on the User Authorisation Enquiry window and then select the required application on the Select Application pop-up.

All of the tasks to which the role is authorised are displayed for your information.

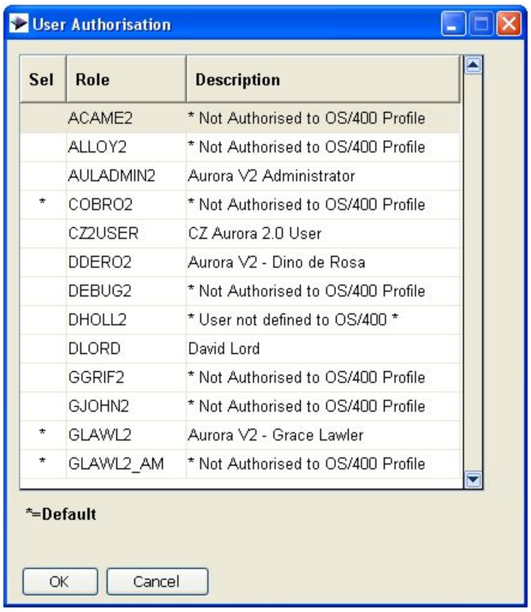



Select **Previous (F12)** to return to the previous window.

# Authorised Users Pop-up

To display this pop-up, select **Authorised Users** on the Role Authorisation Enquiry window.

This pop-up displays a list of users that are authorised to this role. Those marked with an * in the Sel field have this role as their default role.




Select **OK** or **Cancel (F12)** to return.

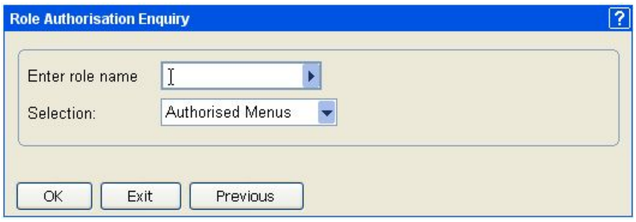
# Role Authority

Use this enquiry to display the Application Manager menus and tasks to which a role is authorised and also a list of users that are authorised to this role.

## Role Authorisation Enquiry Window

To display this pop-up, select **Role Authority** from the Operational Enquiries menu.

Use this pop-up to select a role on which to enquire.




### Field

#### Enter Role Name

Enter the role on which you wish to enquire.

Alternatively, use the prompt facility to select from the Role Selection pop-up.

#### Selection

Select one of the following:

Authorised Menus (1) - To list the menus to which the role is authorised

Authorised Tasks (2) - To list the application tasks to which the role is authorised

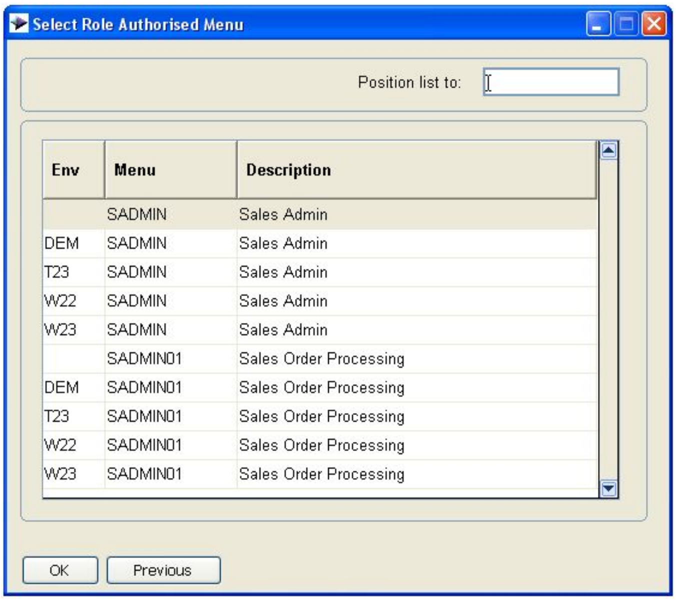
Authorised Users (3) - To list the users that are authorised to the role within a selected application

Make your selection and then select **OK** to display pop-ups for the options chosen in the Selection field.

# Select Role Authorised Menu Pop-up

To display this pop-up, select **Authorised Menus** on the Role Authorisation Enquiry window.

You can view a selected menu.




## Fields

### Position List To

Use this to position the list of menus to the entered value.

## Options

### Select Menu

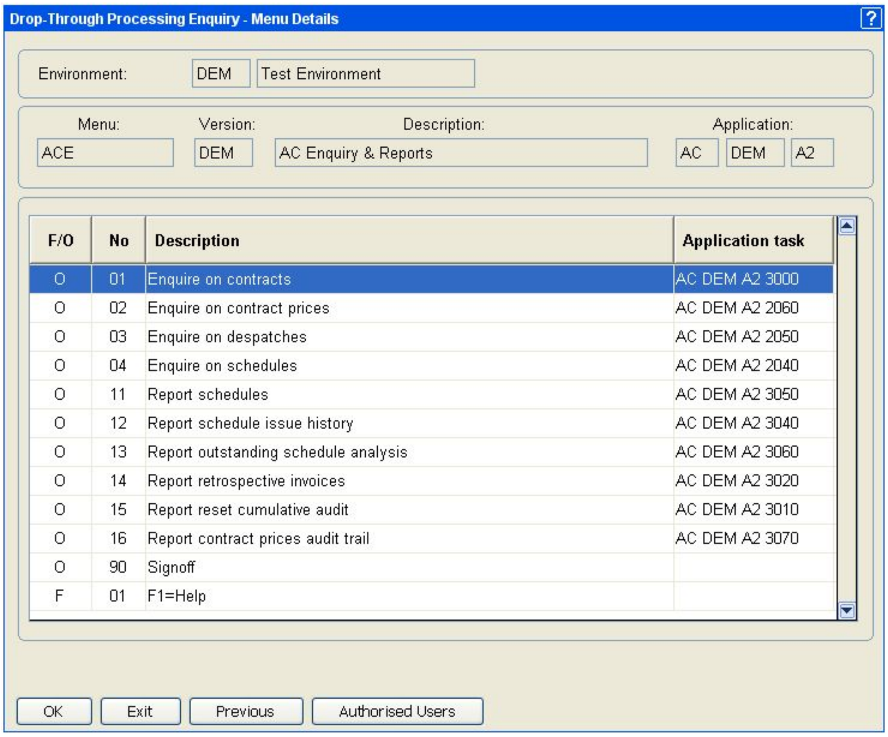
Use this to select a menu.

Use the **Select Menu** option to display the Select User Authorised Menu Details window.

# Select User Authorised Menu Details Window

To display this window, use **Select Menu** on the User Authorised Menu pop-up.

You can view the options and functions used on the menu.


Drop-Through Processing Enquiry - Menu Details

Environment: DEM Test Environment

Menu: ACE
Version: DEM
Description: AC Enquiry & Reports
Application: AC DEM A2

| F/O | No | Description | Application task |
|---|---|---|---|
| O | 01 | Enquire on contracts | AC DEM A2 3000 |
| O | 02 | Enquire on contract prices | AC DEM A2 2060 |
| O | 03 | Enquire on despatches | AC DEM A2 2050 |
| O | 04 | Enquire on schedules | AC DEM A2 2040 |
| O | 11 | Report schedules | AC DEM A2 3050 |
| O | 12 | Report schedule issue history | AC DEM A2 3040 |
| O | 13 | Report outstanding schedule analysis | AC DEM A2 3060 |
| O | 14 | Report retrospective invoices | AC DEM A2 3020 |
| O | 15 | Report reset cumulative audit | AC DEM A2 3010 |
| O | 16 | Report contract prices audit trail | AC DEM A2 3070 |
| O | 90 | Signoff | |
| F | 01 | F1=Help | |

OK | Exit | Previous | Authorised Users

## Options

### Select

Use this to display the Task Details window.

Note: This option is only valid for tasks. It is also valid in GOB for menus in which case the Menu Design window is displayed.

### Library List

Use this to display the Specify User pop-up so that the library list for that user and task can then be displayed.

### Queues Enquiry

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

## Functions

### View Menu (F13)

Use this to display the Menu Design window (see **Maintain Menus** from the Application Manager Main menu).

Note: This function is only valid in GOB.

### Authorised Users (F14)

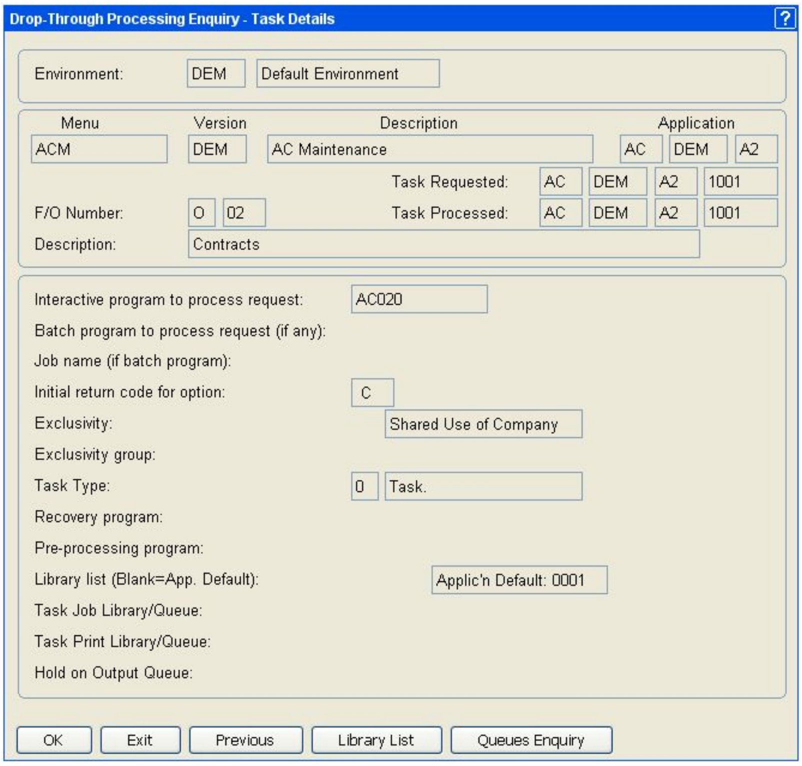
Use this to display Users Authorised to this Menu pop-up.

Select the option you require.

# Task Details Window

To display this window, use **Select** against a task on the Select User Authorised Menu Details window.

You can view the task details on this window.




## Functions

### Library List (F17)

Use this to display the Specify User pop-up so that the library list for the user and task can then be displayed.

### Queues Enquiry (F20)

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task may be displayed.

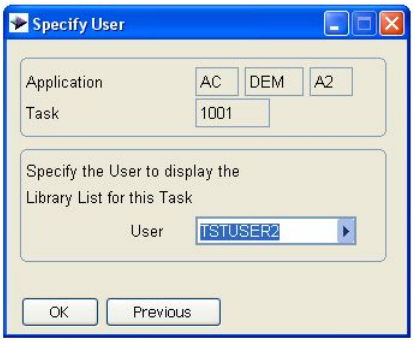
Select the function you require or select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Specify User Pop-up

To display this window, select **Library List** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Library List (F17)** on the Task Details window.

Enter the user required on this pop-up.




## Fields

### User

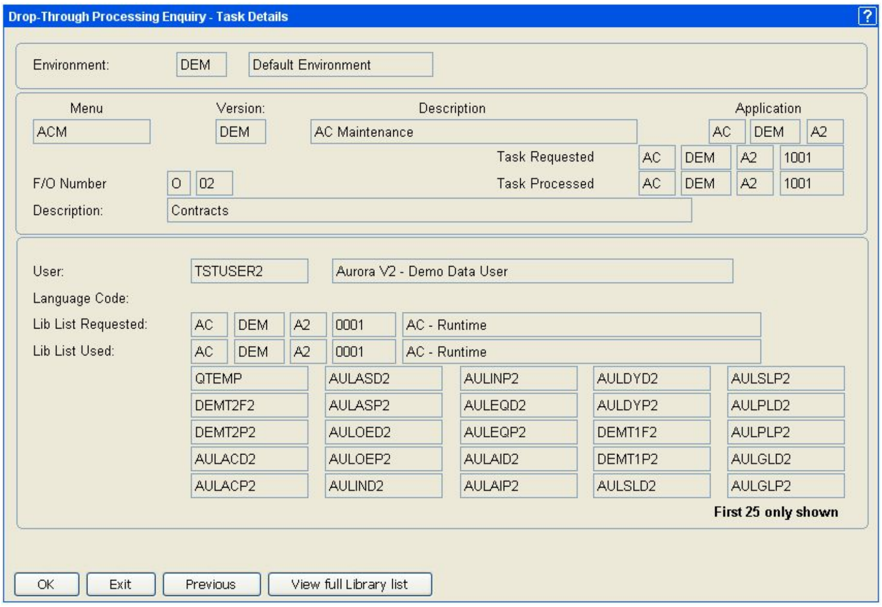
Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

Enter or select a user profile and then select **OK** to display the Library List window.

# Library List Window

To display this window, enter or select a user profile and then select **OK** on the Specify User pop-up.

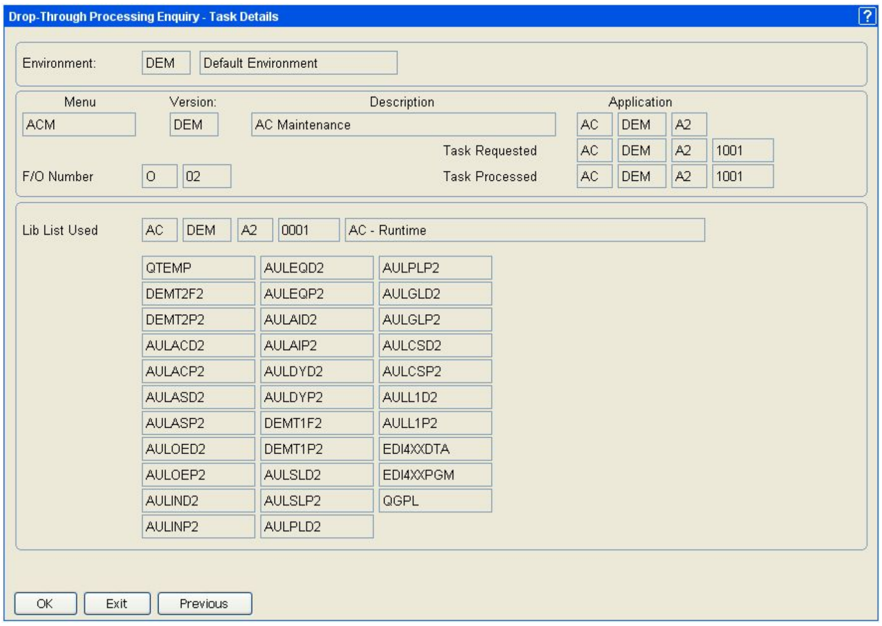



Only the first 25 libraries in the library list are shown. Select **View Full Library List (F15)** to view the Full Library List window if the library list has more than 25 entries.

Otherwise, select **Exit (F3)** to leave the task or **Previous (F12)** to return.

# Full Library List Window

To display this window, select **View Full Library List (F15)** on the Library List window.




Select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Specify User & Company Pop-up

To display this window, select **Queues Enquiry** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Queues Enquiry (F20)** on the Task Details window.

Enter the user and company required on this pop-up.


## Fields

### User

Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

### Company

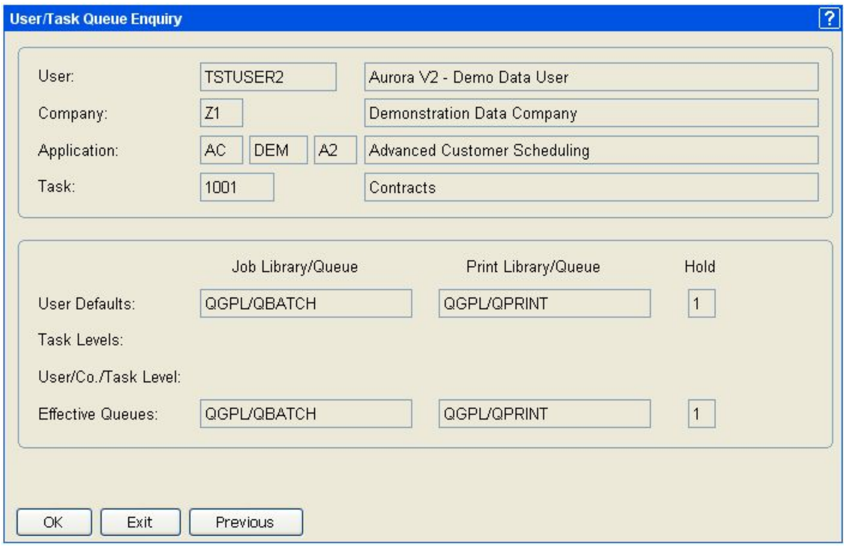
Enter the required company.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Enter or select a user profile and company and then select **OK** to display the User/Task Queue Enquiry window.

# User/Task Queue Enquiry Window

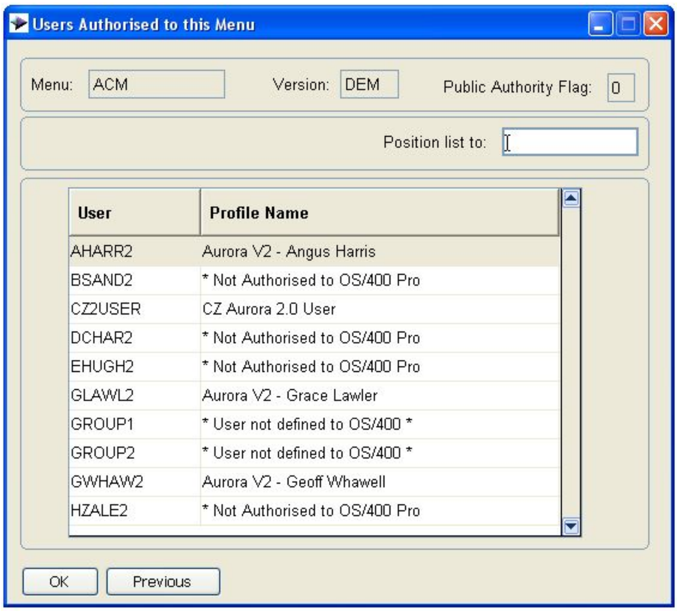
To display this window, enter the user profile and company required and then select **OK** on the Specify User & Company pop-up.




Select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# User Authorised to this Menu Pop-up

To display this window, select **Authorised Users (F14)** on the Select User Authorised Menu Details window.

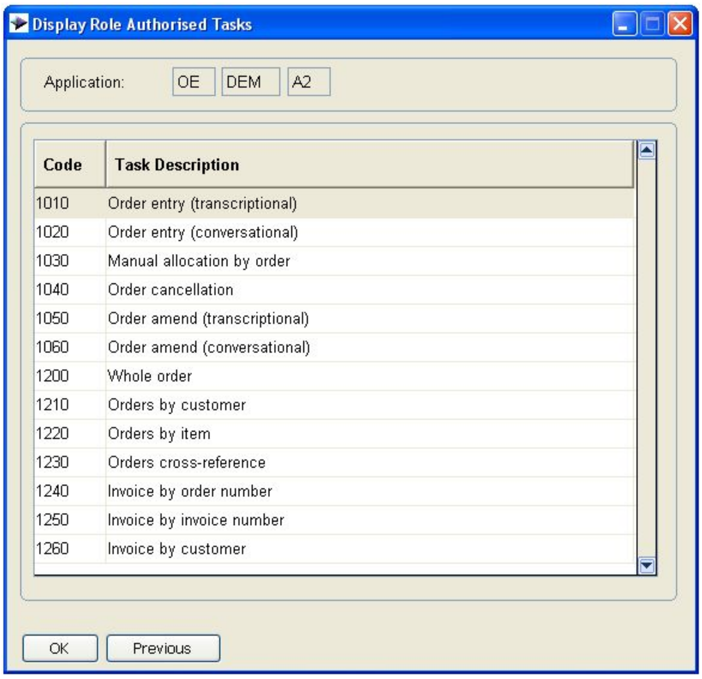



Select **OK** or **Previous (F12)** to return.

# Display Role Authorised Tasks Pop-up

To display this pop-up, select **Authorised Tasks** on the Role Authorisation Enquiry window and then select the required application on the Select Application pop-up.

All of the tasks to which the role is authorised are displayed for your information.

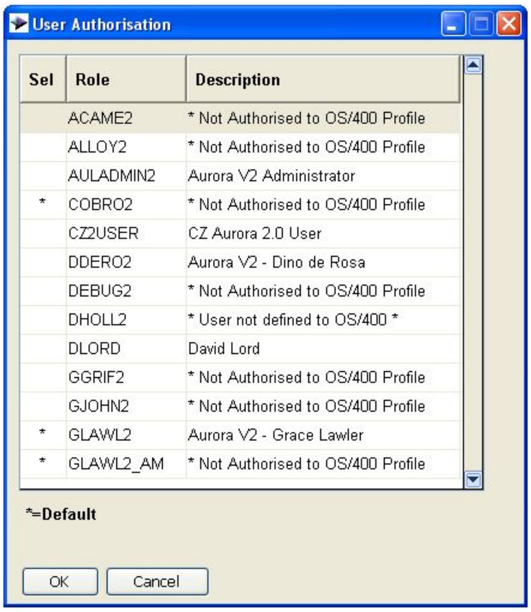



Select **Previous (F12)** to return to the previous window.

# Authorised Users Pop-up

To display this pop-up, select **Authorised Users** on the Role Authorisation Enquiry window.

This pop-up displays a list of users that are authorised to this role. Those marked with an * in the Sel field have this role as their default role.




Select **OK** or **Cancel (F12)** to return.

# Menu/Task Execution Process

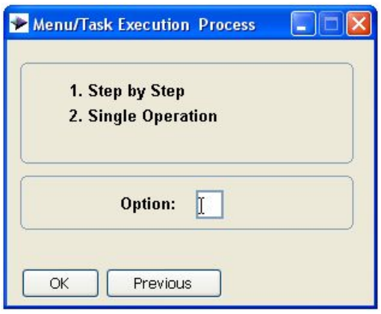
Use this task to enquire on the tasks, job queues and output queues that Application Manager performs in response to a request.

## Menu/Task Execution Process Pop-up

To display this pop-up, select **Menu/Task Execution Process** from the Operational Enquiries menu.

From this menu, you can select two levels of enquiring on Application Manager.

Use Step by Step to enter your query in steps, and Single Operation to go straight to the enquiry window.




### Fields

#### Option

Enter one of the following:

1 - To use the Step by Step enquiry

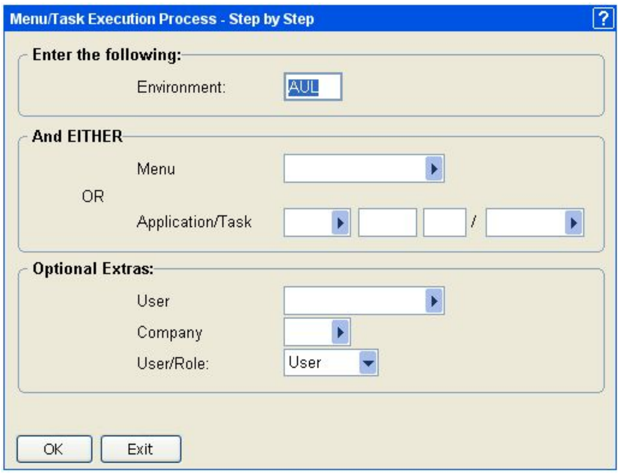
2 - To use the Single Operation enquiry

Enter **1** or **2** and then select **OK** to display the next selection window.

# Menu/Task Execution Process Step by Step Window

To display this window, select option **1** (Step by Step) from the Menu/Task Execution Process pop-up.

Use this window to specify the menu or a task you want to display.




## Fields

### Environment

Enter the environment in which the request for a menu or task would take place. The default environment is displayed.

### Menu

Enter a menu, for example, AO for the Advanced Order Entry menu. If you enter a menu, you cannot enter anything in the Application/Task field below.

You can use the prompt facility on this field to select from the Select Menu pop-up.

### Application/Task

Enter an application and task in the four available entry fields as follows: application, version, release number and task number.

For example: CS OSL 03 / 0106 is Cash Management Version 03 Confirm Customer Receipts.

If you enter a task, you cannot enter anything in the Menu field above.

You can use the prompt facility on these fields to select from the Select Application and Select Application Task pop-ups.

### Optional Extras

### User

You can optionally enter a user for the enquiry.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

### Company

You can optionally enter a company for the enquiry.

Alternatively, use the prompt facility to select from the Select Company pop-up.

### User/Role

Select one of the following:

User - If this is selected, when the Drop-Through Processing Enquiry Menu Details window is displayed, you can see **Authorised Users (F14)**.

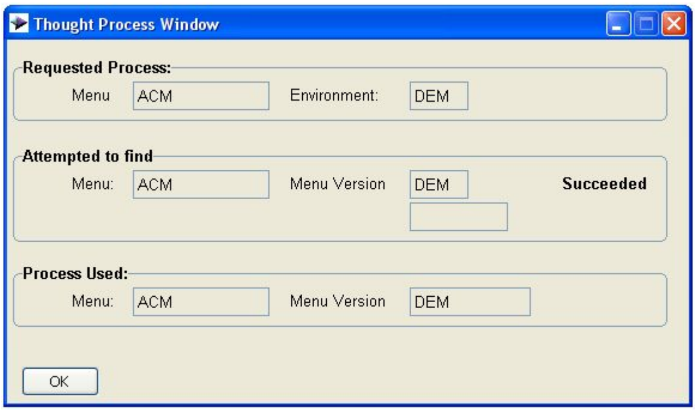
Role - If this is selected, when the Drop-Through Processing Enquiry Menu Details window is displayed, you can see **Authorised Roles (F14)**.

Select **OK** to start the search.

# Thought Process Pop-up

To display this pop-up, make your selection and then select **OK** on the Menu/ Task Execution Process Step by Step window.

The background processes (drop-through rules) that the system goes through to handle this request at this stage are displayed for your information.



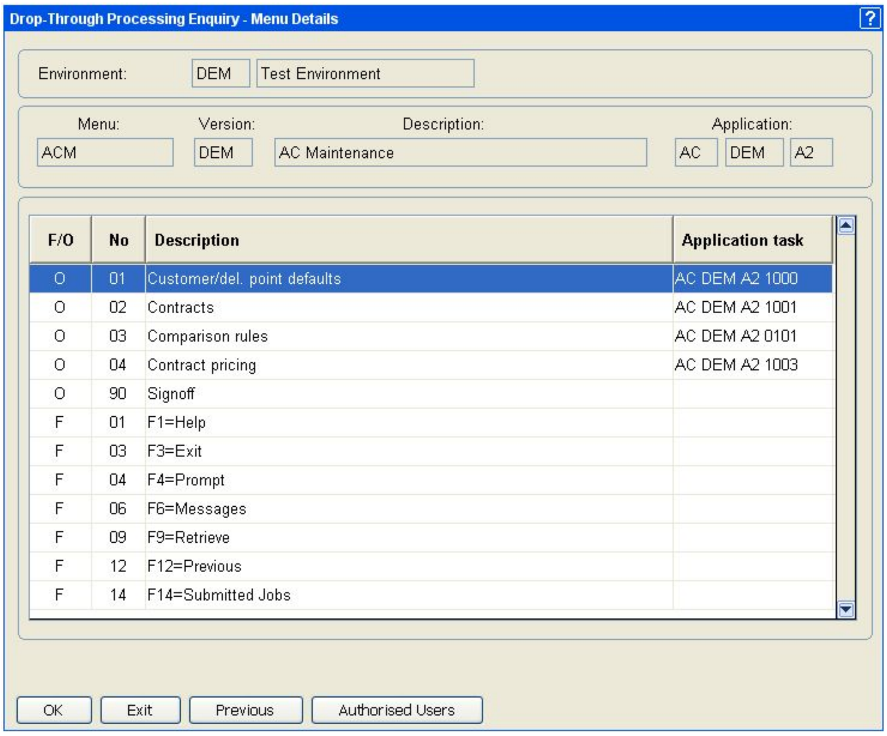

Select **OK** to display the next window.

# Drop-Through Processing Enquiry Menu Details Window

To display this window, enter menu details on the Menu/Task Execution Process Step by Step window.

You can enquire on details of the selected menu, and drill down to the library list and job and output queue for the task. Use **Select** against an option to go to the next step of execution processing.

Options to view the selected menu and the users authorised are available.




## Options

### Select

Use this to display the Task Details window.

Note: This option is only valid for tasks. It is also valid in GOB for menus in which case the Menu Design window is displayed.

### Library List

Use this to display the Specify User pop-up so that the library list for that user and task can then be displayed.

### Queues Enquiry

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

## Functions

### View Menu (F13)

Use this to display the Menu Design window (see **Maintain Menus** from the Application Manager Main menu).

Note: This function is only valid in GOB.

### Authorised Users/Roles (F14)

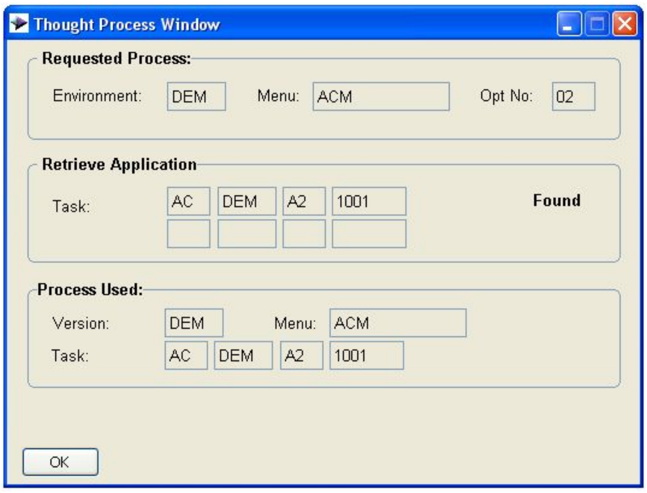
Use this to display Users/Roles Authorised to this Menu pop-up (depending on whether **User** or **Role** was specified in the User/Role field on the Menu/Task Execution Process Step by Step window).

Select the option or function you require.

# Thought Process Tasks Pop-up

To display this pop-up, make your selection and select an option on the Drop-Through Processing Enquiry Menu Details window.

The background processes (drop-through rules) that the system goes through to handle this request at this stage are displayed for your information.

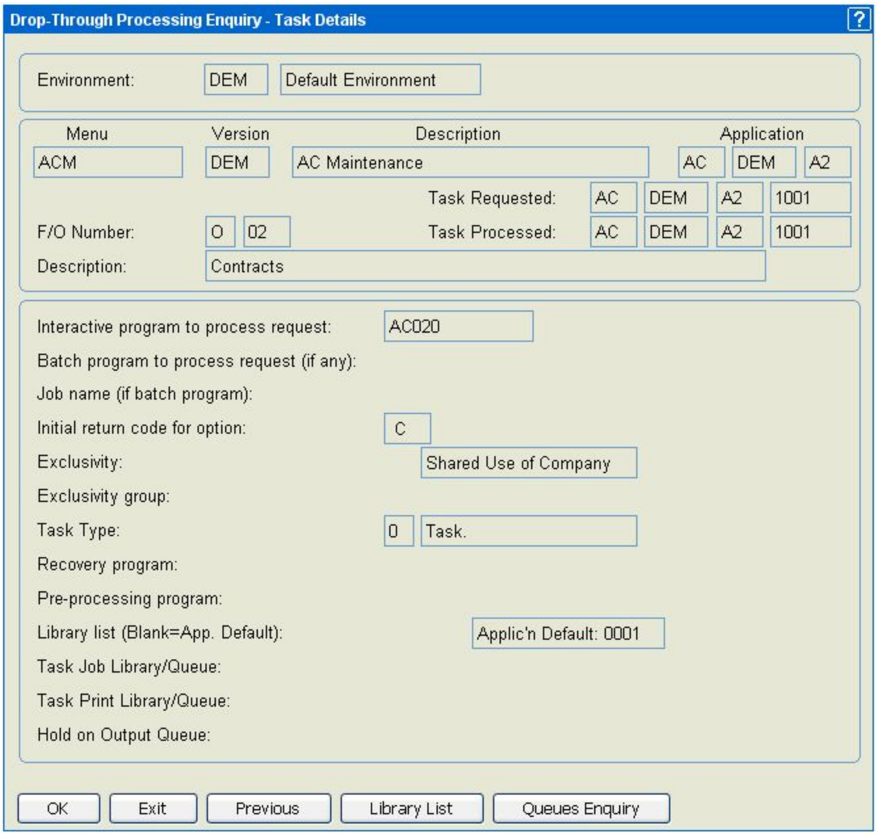



Select **OK** to display the next window.

# Drop-Through Processing Enquiry Task Details Window

To display this window, select **OK** on the Thought Process Tasks pop-up.

You can view the task details on this window.




## Functions

### Library List (F17)

Use this to display the Specify User pop-up so that the library list for that user and task can then be displayed.

### Queues Enquiry (F20)

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

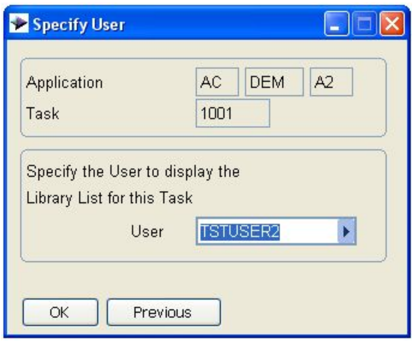
Select the function you require or select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Specify User Pop-up

To display this window, select **Library List** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Library List (F17)** on the Task Details window.

Enter the user required on this pop-up.




## Fields

### User

Enter the required user profile.

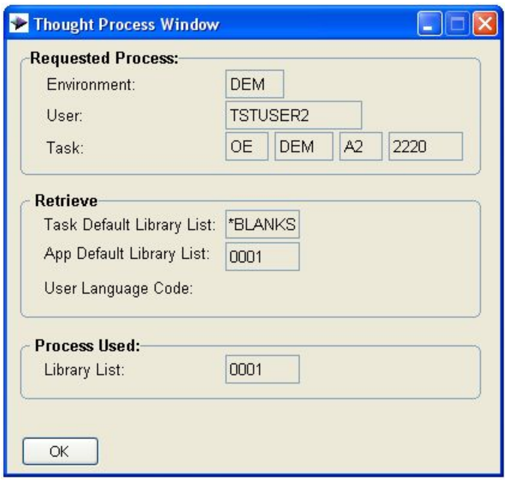
Alternatively, use the prompt facility to select from the Select User Profile pop-up.

Enter or select a user profile and then select **OK** to display the Thought Process Library List window.

# Thought Process Library List Pop-up

To display this pop-up, make your selection and select an option on the Drop-Through Processing Enquiry Menu Details window.

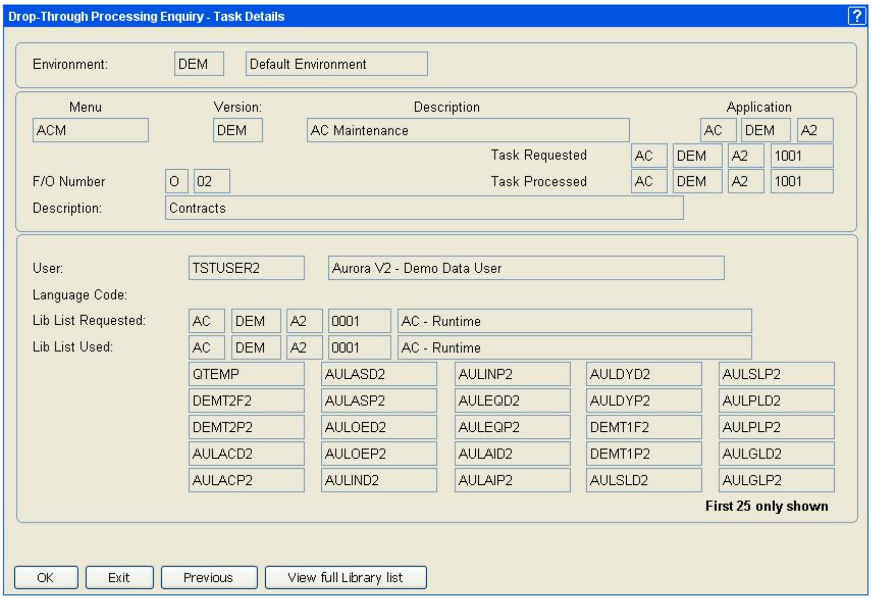
The background processes (drop-through rules) that the system goes through to handle this request at this stage are displayed for your information.




Select **OK** to display the next window.

# Library List Window

To display this window, enter or select a user profile and then select **OK** on the Thought Process Library List pop-up.

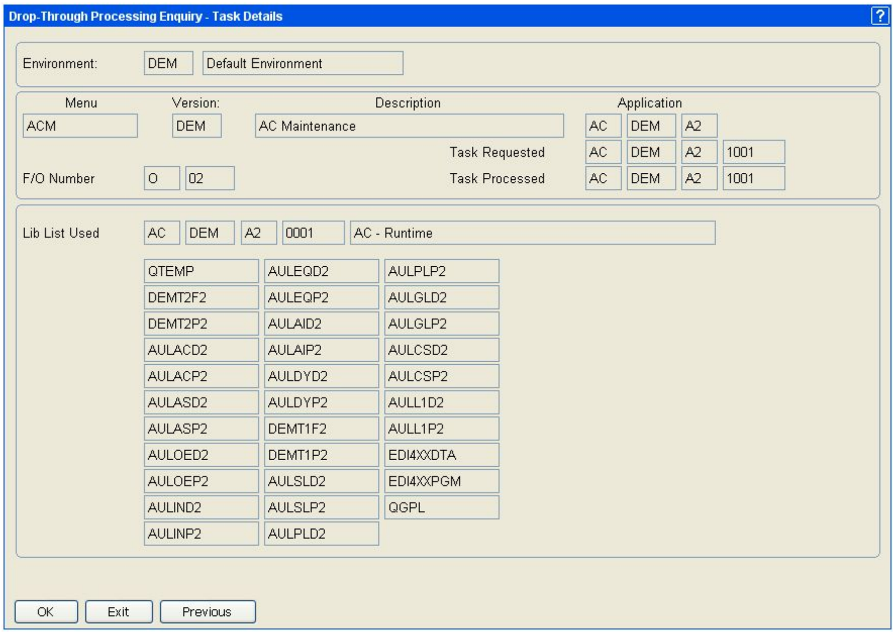



Only the first 25 libraries in the library list are shown. Select **View Full Library List (F15)** to view the Full Library List window if the library list has more than 25 entries.

Otherwise, select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Full Library List Window

To display this window, select **View Full Library List (F15)** on the Library List window.




Select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Specify User & Company Pop-up

To display this window, select **Queues Enquiry** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Queues Enquiry (F20)** on the Task Details window.

Enter the user and company required on this pop-up.


## Fields

### User

Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

### Company

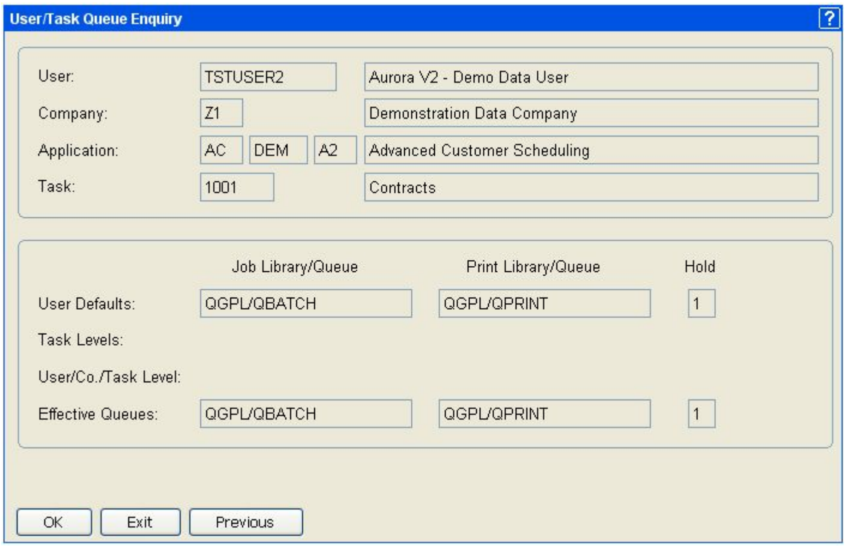
Enter the required company.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Enter or select a user profile and company and then select **OK** to display the User/Task Queue Enquiry window.

# User/Task Queue Enquiry Window

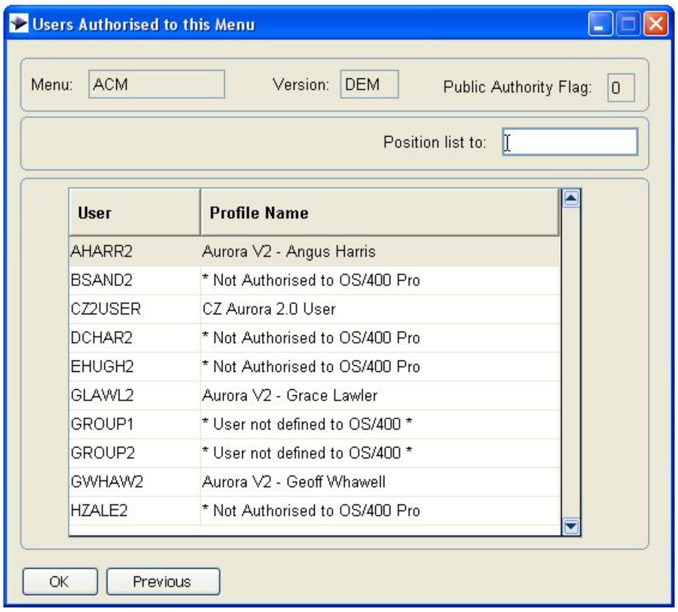
To display this window, enter or select a user profile and company and then select **OK** on the Specify User & Company pop-up.




Select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# User Authorised to this Menu Pop-up

To display this window, select **Authorised User (F14)** on the Select User Authorised Menu Details window.

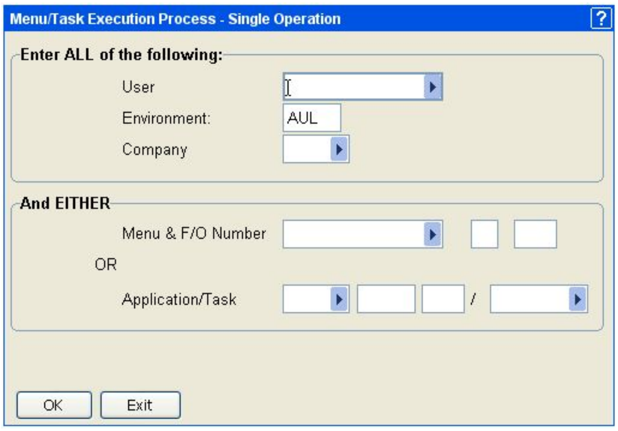



Select **OK** or **Previous (F12)** to return.

# Menu/Task Execution Process Single Operation

To display this pop-up, select option **2** (Single Operation) from the Menu/Task Execution Process pop-up.

Use this window to specify criteria for your enquiry. This is for either a single task or a single menu operation (function key or menu option).




## Fields

You must make an entry in each of the first three fields.

### User

Enter the name of the user who would make the request.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

### Environment

Enter the code for the environment in which the request would be made.

### Company

Enter the company code.

Alternatively, use the prompt facility to select from the Select Company pop-up.

### Menu & F/O Number

Enter the menu and then **F** for the function or **O** for the menu followed by an option number.

You can use the prompt facility on the Menu field to select from the Menu pop-up.

### Application Task

Enter or select the application, version and release level and task code.

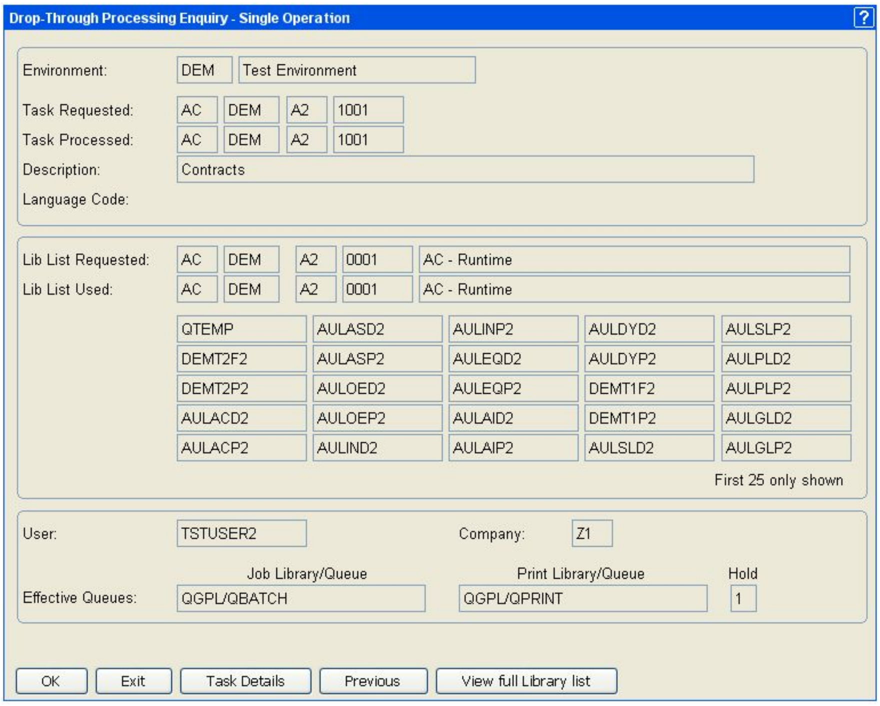
You can use the prompt facility on these fields to select from the Select Application and Select Application Task pop-ups.

Select **OK** to display the Drop-Through Processing Single Operation Summary Enquiry window.

# Drop-Through Processing Single Operation Summary Enquiry Window

To display this window, select **OK** on the Menu/Task Execution Process Single Operation window.

This window displays full details of the selected task.




## Functions

### Task Details (F10)

Use this to display the Drop-Through Processing Enquiry Task Details window.

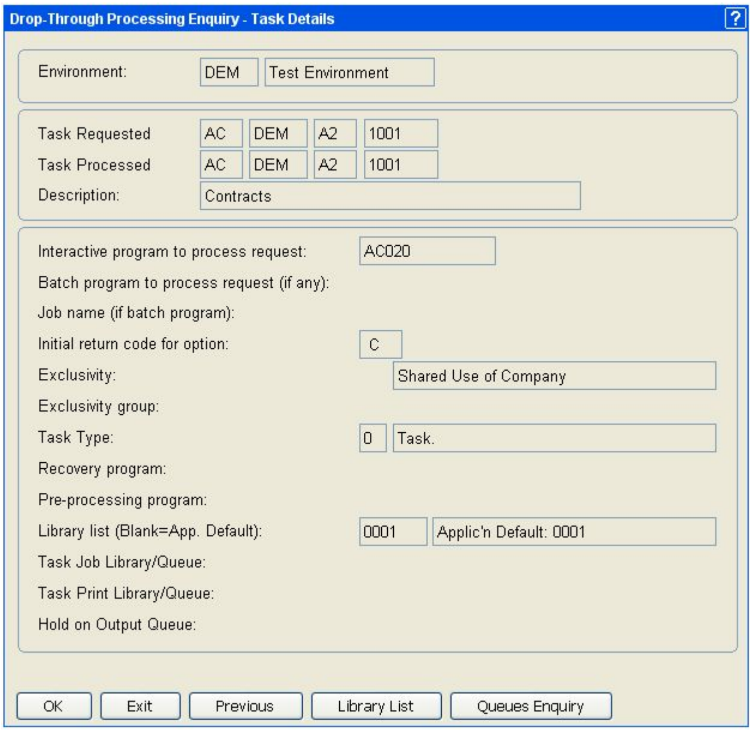
### View Full Library List (F15)

Use this to view the View Full Library List window.

Select the function you require or select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Drop-Through Processing Enquiry Task Details Window

To display this window, select **Task Details (F10)** on the Drop-Through Processing Single Operation Summary window.




## Functions

### Library List (F17)

Use this to display the Library List window.

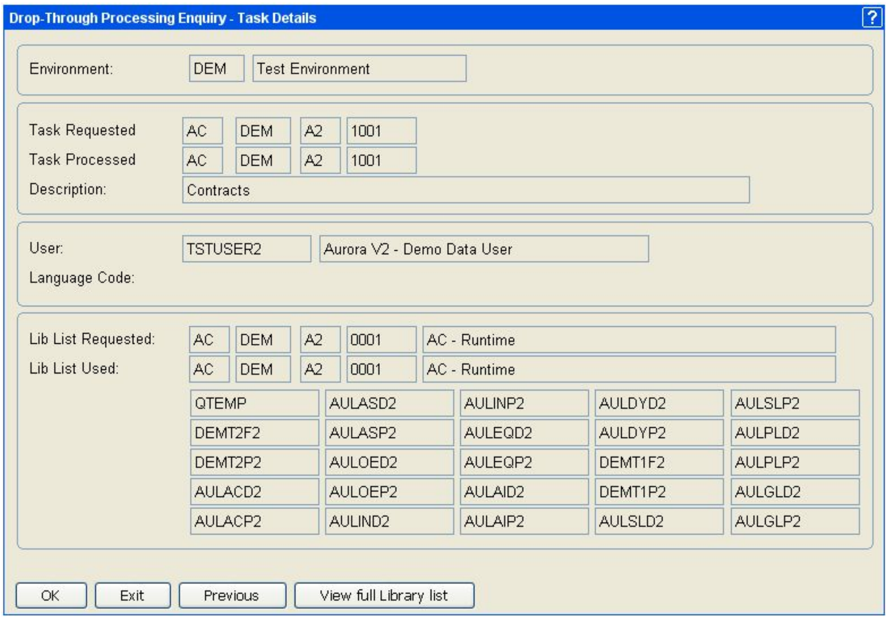
### Queues Enquiry (F20)

Use this to display the Specify User & Company pop-up so that the queues for the user, company and task can be displayed.

Select the function you require or select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Library List Window

To display this window, select **Library List (F17)** on the Drop-Through Processing Enquiry Task Details window.

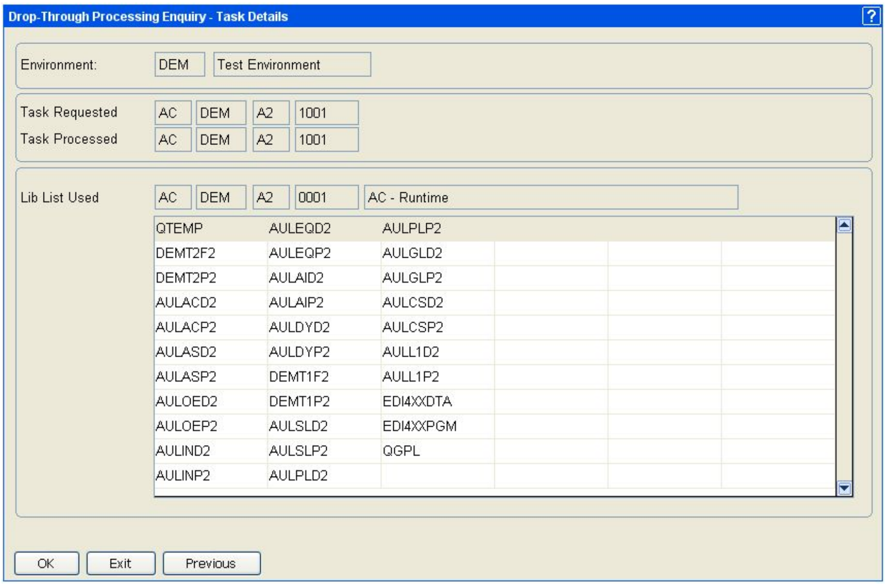



Only the first 25 libraries in the library list are shown. Select **View Full Library List (F15)** to view the Full Library List window if the library list has more than 25 entries.

Otherwise, select **Exit (F3)** to leave the option or **Previous (F12)** to return.

# Full Library List Window

To display this window, select **View Full Library List (F15)** on the Library List window.




Select **Exit (F3)** to leave the window or **Previous (F12)** to return.

# Specify User & Company Pop-up

To display this window, select **Queues Enquiry** against a task on the Select User Authorised Menu Details window.

Alternatively, select **Queues Enquiry (F20)** on the Task Details window.

Enter the user and company required on this pop-up.


## Fields

### User

Enter the required user profile.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

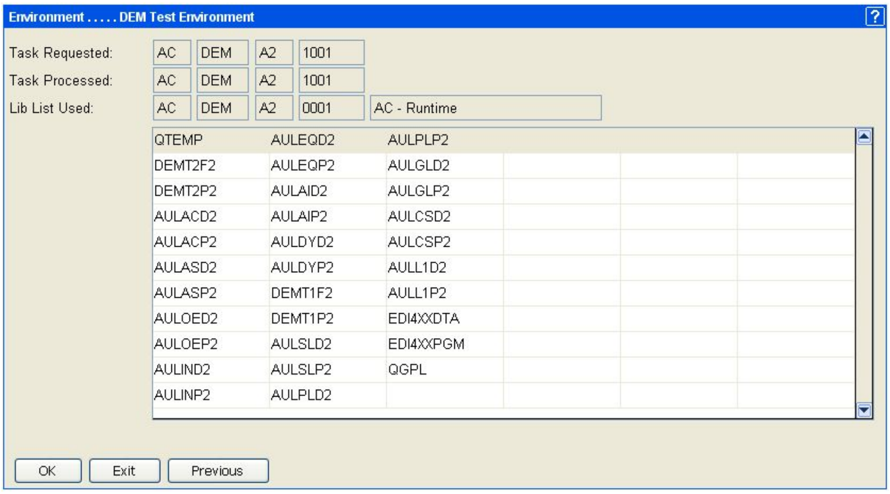
### Company

Enter the required company.

Alternatively, use the prompt facility to select from the Select Company pop-up.

Enter or select a user profile and company and then select **OK** to display the User/Task Queue Enquiry window.

# View Full Library List Window



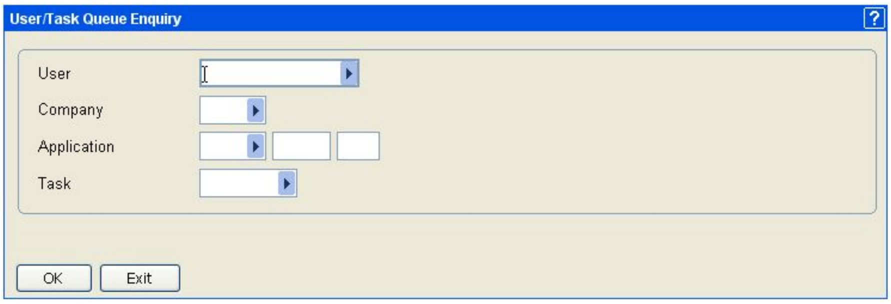

Select Exit (F3) to leave the option or Previous (F12) to return.

# User/Task Queues

## User/Task Queue Enquiry Window

To display this window, select **User/Task Queues** from the Operational Enquiries menu.

You must complete each field to define the enquiry.




### Fields

#### User

Enter the user name for the enquiry.

Alternatively, use the prompt facility to select from the Select User Profile pop-up.

#### Company

Enter the company code.

Alternatively, use the prompt facility to select from the Select Company pop-up.

#### Application

Enter the application code, environment (version) and release number.

Alternatively, use the prompt facility to select from the Select Application pop-up.

#### Task

Enter the task required.

Alternatively, use the prompt facility to select from the Select Application Task pop-up.

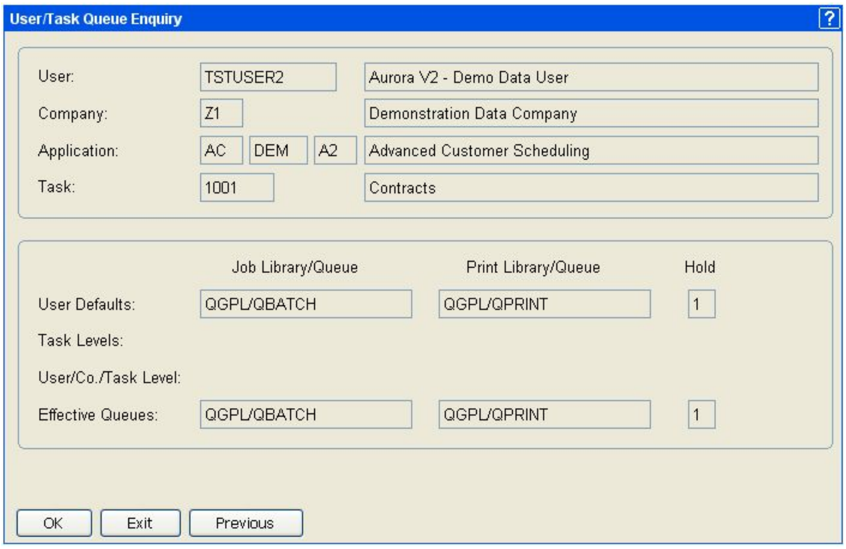
Select **OK** to display the User/Task Queue Enquiry window.

# User/Task Queue Enquiry Window

To display this window, complete the User/Task Queue Enquiry Selection window and then select **OK**.

Note: This enquiry is also available from the Menu/Task Execution Process option.

This enquiry window displays the User/Task Queue Enquiry window showing job queue, print queue and hold status.




Select **Previous (F12)** or **Exit (F3)** to leave the option.

# Chapter 8 - Documentation

# Application Profiles

Select **Application Profiles** from the Documentation menu.

Use this option to produce a listing of the application profiles set up within Application Manager.

The listing includes application details, library code, company validation program, day-end program and description.

No window is displayed for this option.

Note: For details on setting up the profiles, see the Maintain Applications section.

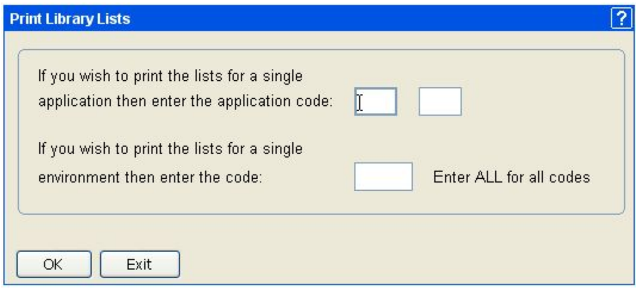
Select **OK**. A spool file is produced which you may view or print.

# Library Lists

Use this option to produce a listing of the library lists set up within the Application Manager system. For more details on setting up library lists, see the Maintain Library Lists section.

## Print Library Lists Window

To display this window, select **Library Lists** from the Documentation menu and then select **OK**.




### Fields

#### ...Single Application...

To select the library lists for a single application, enter the Application Code.

#### ...Single Environment...

To select a single environment (version), enter the required code. Alternatively, enter **ALL** to select all environments. (You must do this because three blanks indicate the Blank environment.)

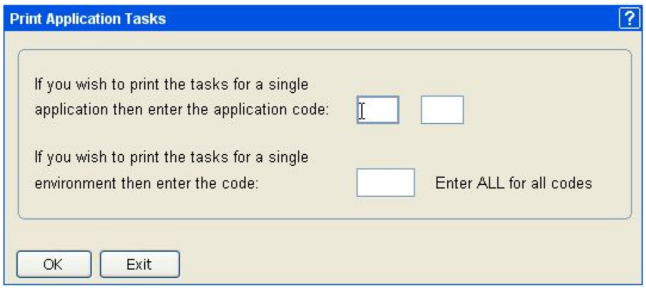
Select **OK** to submit a job to produce the list.

# Tasks

Use this option to produce a report of all task codes defined within Application Manager via the Maintain Tasks option. For more details, refer to the Maintain Tasks section.

## Print Application Tasks Window

To display this window select **Tasks** from the Documentation menu and then select **OK**.




### Fields

#### ...Single Application...

To select the tasks for a single application, enter the application code.

#### ...Single Environment...

To select a single environment (version), enter the required code. Alternatively, enter **ALL** to select all environments. (You must do this because three blanks indicate the Blank environment.)

Select **OK** to submit a job to produce the list.

# Menus

Use this option to produce a report of the menus created via the Maintain Menus option.

## Print Menu Definitions Window

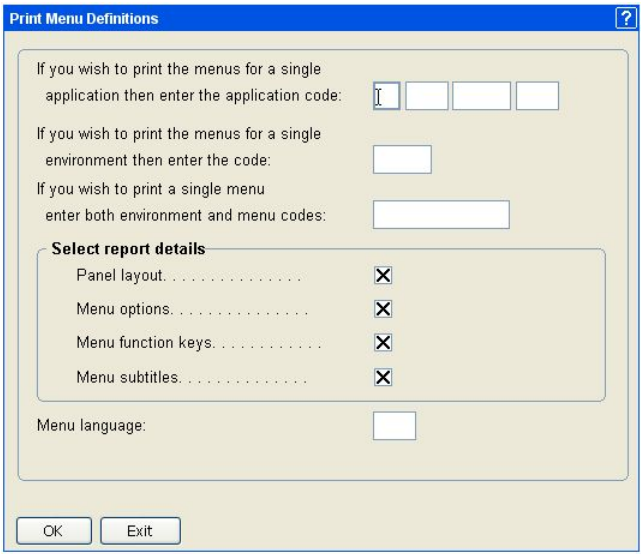
To display this window, select **Menus** from the Documentation menu.

This produces a report of the menus similar to the Conversion Audit report. Report on:

- All menus, by leaving the selection criteria blank
- All menus for a single application, by entering only the application details
- All menus for a menu environment, by entering the environment code
- A single menu, by entering the environment code and the menu code.

The details included on the report can be selected.

The description language can also be specified.




### Fields

#### ...Single Application...

To select the menus for a single application, enter the application code.

#### ...Single Environment...

To select a single environment (version), enter the required code. Alternatively, enter a code of **ALL** to select all environments. (You must do this because three blanks indicate the Blank environment.)

### ...Single Menu...

To select a single menu, enter the menu in this field (as well as the environment code above).

### Select Report Details

Use the following fields to choose the level of detail you wish to produce.

### Panel Layout

Check this field to have the panel layout printed on the report.

### Menu Options

Check this field to have the menu option details printed on the report.

### Menu Function Keys

Check this field to have the function details printed on the report.

### Menu Subtitles

Check this field to have the menu subtitles printed on the report.

### Menu Language

You can optionally enter a menu language as a selection for the report.

Select **OK** to submit the job.

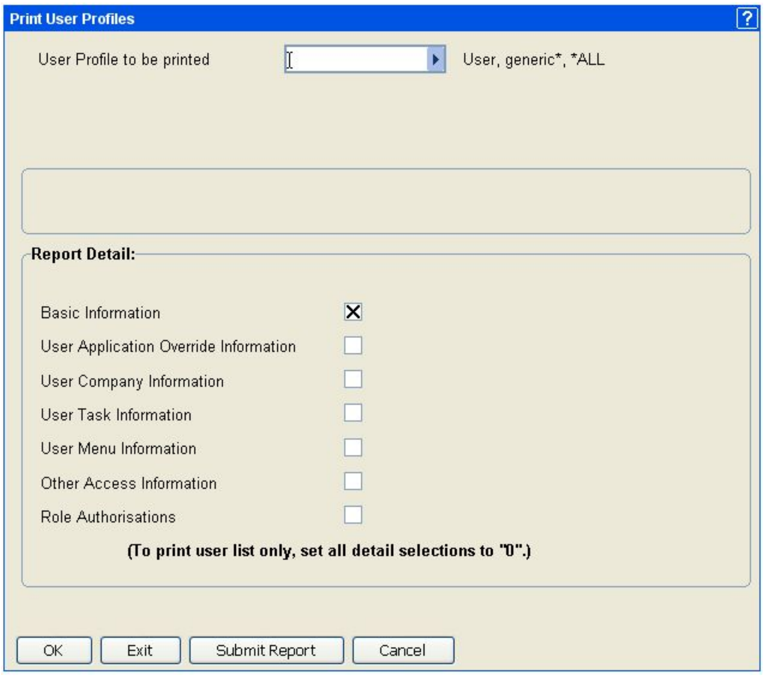
# User Profiles

This menu option is the same as the Print User Profiles option from the Administration Functions menu.

## Print User Profile Window

To display this window, select **User Profiles** from the Documentation menu.

Use this window to select a profile or profiles and the level of detail to be printed.




### Fields

#### User Profile to be Printed

Enter a single user ID, a generic group of user IDs or ***ALL** to print details of all user IDs.

## Report Detail

Use these checkboxes as follows:

Unchecked - If you do not want to include the information in the report

Checked - If you do want to include the information in the report

The details printed for each user within each category are as follows:

**Basic Information**

The user's print queue and whether spool files are held on the queue

The user's job queue

The user level of the user

The date format used by the user

**User Application Override Information**

Any company/task overrides for the user, sorted by application

**User Company Information**

The companies and tasks within each application to which the user is authorised, sorted by application

**User Task Information**

The tasks within each application to which the user is authorised, sorted by application

**User Menu Information**

All of the menus available to the user and the options and functions to which they are authorised

**Other Access Information**

Group jobs set up for the user, Network Manager passthrough connections and distribution queues to which the user is authorised

**Role Authorisations**

All of the roles that the users is authorised to use

To see which menus and tasks a role is authorised to, the Role Profile report should be produced.

> Note: If role processing is active, this report should be used in conjunction with the Role Profile report to identify the full extent of a user's authorisation.

Note: If you **check** all the selections, you could produce a very large report. To print a user list, set all the selections to **unchecked** and enter ***ALL** in the User Profile to be Printed field.

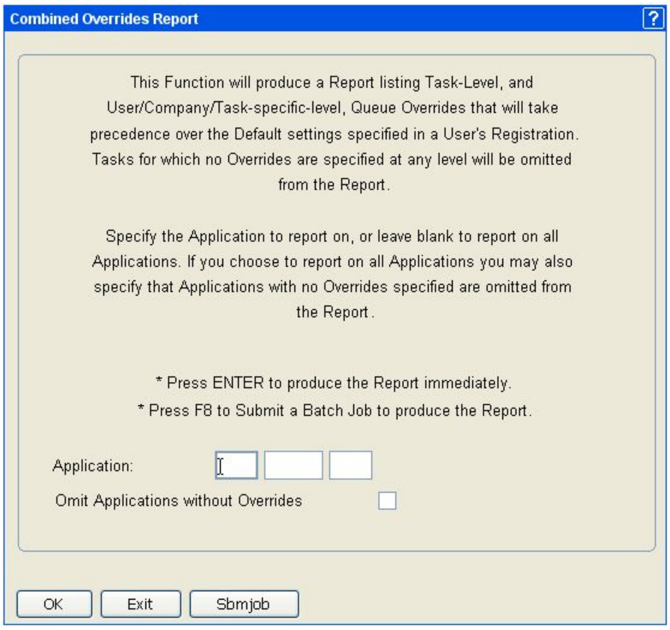
Select **Submit Report (F8)** to submit a batch job to produce the report.

When you return to the Documentation menu, you can select **View Prints (F18)** to display the Work with All Spooled Files window.

# Combined Overrides

To display this window, select **Combined Overrides** from the Documentation menu.

Use this window to select criteria for this report. If you select **OK** without completing the fields, a full report (which may be very large) is produced.




## Fields

### Application

To report on overrides for one application, enter the application code, version and release number.

### Omit Applications without Overrides

Use this checkbox as follows:

Unchecked - To include all applications

Checked - To include only applications which have overrides

## Functions

### Sbmjob (F8)

Use this to submit the print job to your default job queue.

Select **OK** to produce the report interactively, or select **Sbmjob (F8)** to submit a batch job.

# Chapter 9 - Utilities

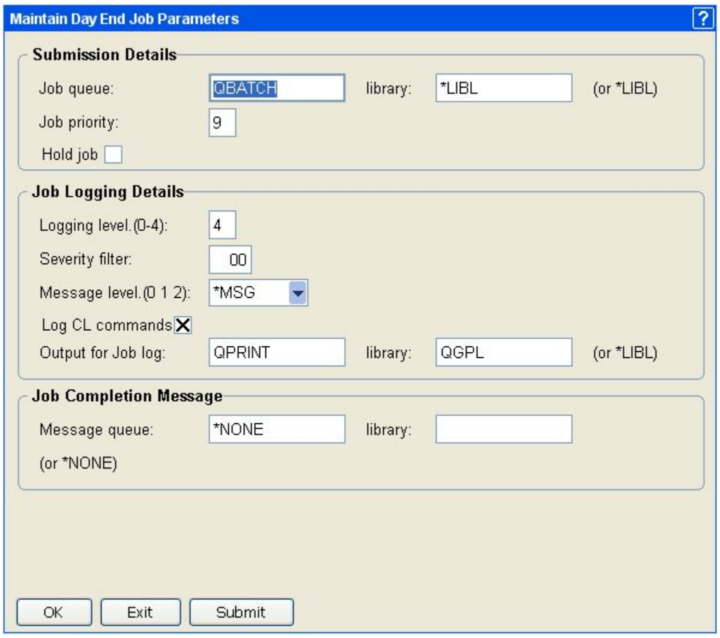
# Day End Parameters

Use this option to set up the parameters used to submit the Application Manager day end job.

## Maintain Day End Job Parameters Window

To display this window, select **Day End Parameters** from the Utilities menu.

Use this window to define the control settings for the day end job.




### Fields

#### Submission Details

##### Job Queue

Enter the name of the job queue (and the name of the library in which this job queue resides) to which the day end job should be submitted.

##### Job Priority

Enter the priority which the job will assume within the job queue to which the day end routine will be submitted.

##### Hold Job

Use this checkbox as follows:

Unchecked - To submit the job in a released state to the job queue

Checked - To submit the job in a held state to the job queue

#### Job Logging Details

##### Logging Level (0-4)

Enter the level of logging which the Application Manager day end job should produce. **4** is the highest level and **0** is the lowest.

### Severity Filter

Enter the lowest level of message severity which you wish to be logged.

Enter **00** to log all messages regardless of severity.

### Message Level (0 1 2)

Select the type of logging to be taken:

*NOLIST (0)

*MSG (1)

*SECLVL (2)

### Log CL Commands

Use this checkbox as follows:

Unchecked - To exclude all CL commands executed by programs in logging

Checked - To include all CL commands executed in programs in logging

### Output for Job Log

Enter the name of the output queue (and the name of the library in which it resides) to which the job log output is to be sent.

## Job Completion Message

### Message Queue

Enter the name of the message queue (and the name of the library in which it resides) to which you wish the job completion message to be sent.

Alternatively, you may enter ***WRKSTN** to send the job completion message to the workstation from which the Application Manager day end job was submitted.

If you enter ***NONE** it will inhibit the sending of a job completion message.

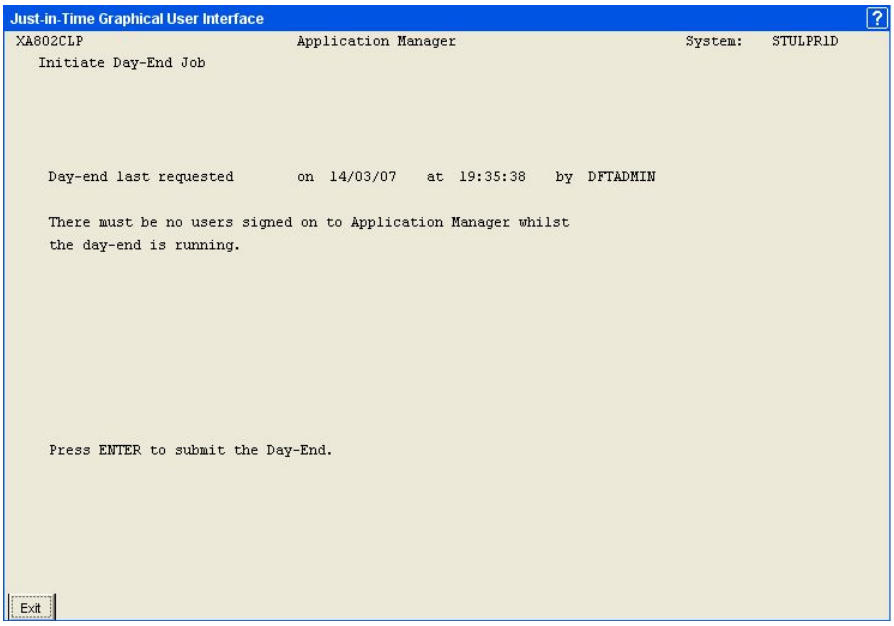
> Note: If you are processing overnight jobs automatically using Machine Manager, it is recommended that the Application Manager day end be initiated via that means. To achieve this, create a day end job with request data:
>
> CALL AULAMP3/XA803CLP
>
> Note: This command is a supplied standard job within Machine Manager. It is recommended that you set this up as a Machine Manager Auto Day End Job so that the job is regularly run without the need for manual intervention. See the Machine Manager product guide for further details.

Select **Submit (F8)** to submit the day end procedure: the Initiate Day-End Job window is displayed.

# Initiate Day-End Job Window

To display this window, you select **Submit (F8)** on the previous window.

This shows the date and time when the day end procedure was last requested.




Select **OK** to submit the day end job to the job queue specified in the day end parameters.

Alternatively, select **Exit (F3)** to cancel the job and return to the Utilities menu.

Note: Whilst the day end job is running, there must be no users signed on to Application Manager.

The day end routine:

- Runs the individual application day end routines, as specified via the Maintain Applications option
- Archives the Application Manager jobs initiated since the last day end
- Clears any unfinished jobs in the system
- Re-organises the Application Manager files

# Work with Synonyms

Use this option to create additional search words or synonyms when:

- You cannot enter the full task description in the 50 characters available.
- You have omitted or truncated words.
- The task description contains words for which there are a number of variations, for example plurals.

When you use the search facility from a menu, you only have the ability to control the word dictionary on a one-to-one basis.

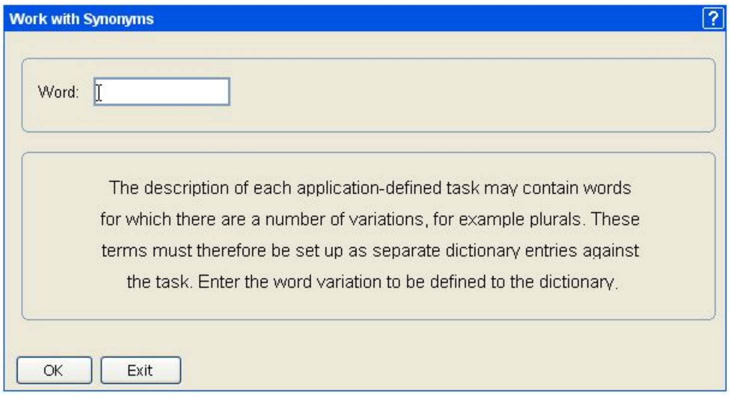
For example, you could set up the word Product as a cross-reference to the word Item as part of a task description. This would mean that users searching for an instance of Product would also find instances of Item. You could then set up a cross-reference from Product to Part.

Use the Work with Synonyms option to define a single word as having many meanings.

## Work with Synonyms Selection Window

To display this window, select **Work with Synonyms** from the Utilities menu.

Enter a search word so that on the next window you can associate other terms with the word entered.




### Fields

#### Word

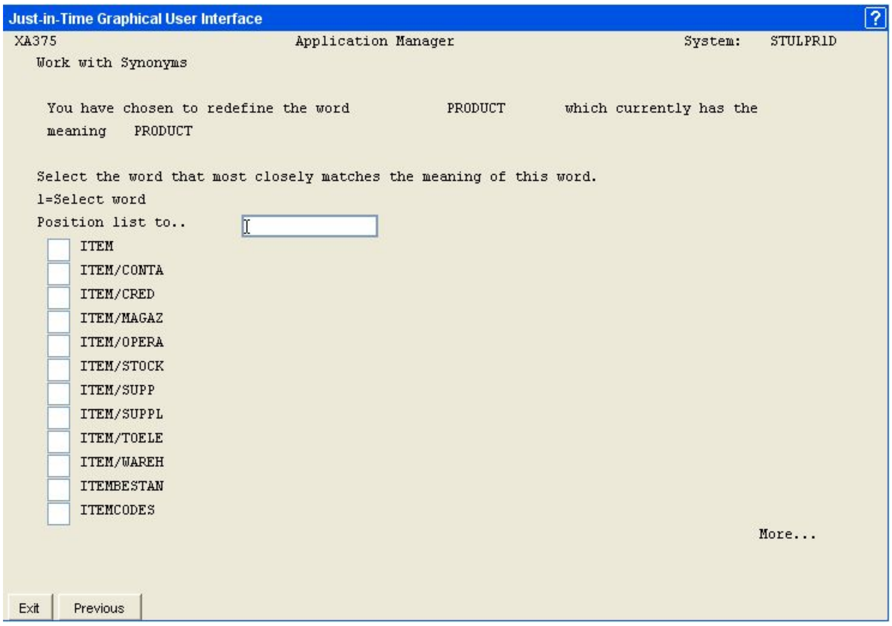
Enter the word you wish to define or re-define.

Select **OK** to display the Work with Synonyms Redefinition window.

# Work with Synonyms Redefinition Window

To display this window, enter a word on the Work with Synonyms Selection window and then select **OK**.

An alphabetical list of all words used in Application Task Descriptions is displayed.




## Fields

### Select (Untitled)

Enter **1** against one or more words which most closely resemble the meaning of the word you are defining.

### Position List To

To re-position the display further down the list, enter a word in the Position To field.

Select **OK** to confirm your selection. Select **Exit (F3)** to return to the Utilities menu or select **Previous (F12)** to return to the Work with Synonyms Selection window.

# Generate Search Tasks

**Warning: Running the Generate Search Tasks facility removes any words created for the dictionary using the Search Tasks facility from menus and the Work with Synonyms option. See the Work with Synonyms section.**

The objectives of the search facility are:

- To provide access to a user's authorised tasks outside the menu structure
- To search only for tasks to which the user is authorised
- To allow a user to enter specific search words and to find tasks described in application terms
- To build a dictionary of user terms to aid response
- To display all tasks that fulfil the search criteria so that the user can select the one required
- To call the task automatically, if there is only one which fulfils the search criteria

The search facility works from the application task descriptions as entered in Maintain Tasks, and is based on the individual words which comprise the description.

For example, a task with a description of ITEM ENQUIRY fulfils searches on ITEM and ENQUIRY. If your term for ITEM is PRODUCT, you can specify this when you carry out a search on PRODUCT; then the tasks with ITEM appearing in the description are also picked up.

This sets up a one-to-one dictionary.

Note the following:

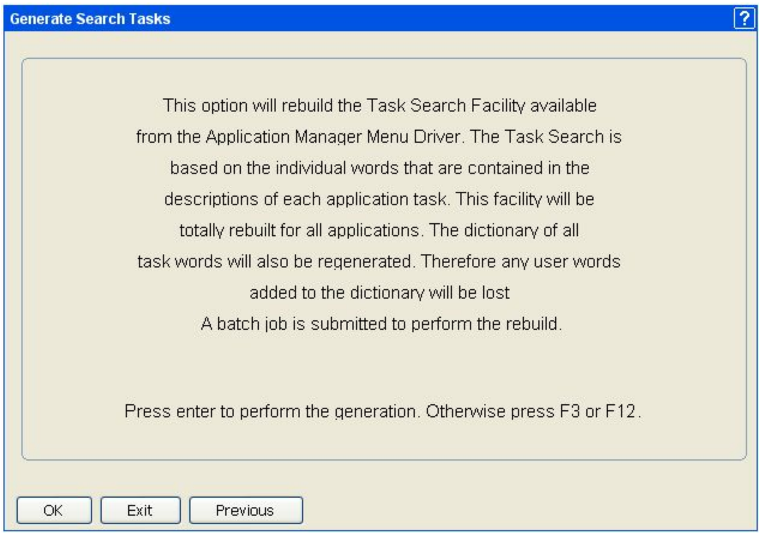
- Spelling of task descriptions must be correct.
- The description must fully identify the processing carried out.
- Any tailor-made task on which a search is required should be set up as an application task, not specified on menus as a user-defined function.

Use this option to generate the search word basic dictionary. You only need to run this if the search word dictionary needs to be re-built.

## Generate Search Tasks Window

To display this window, select **Generate Search Tasks** from the Utilities menu and then select **OK**.

Use this window to submit the batch job that rebuilds the search facility.




Select **OK** to submit the job, or select **Exit (F3)** or **Previous (F12)** to return to the Utilities menu.

# Verify Allocations

Use this option to clean up application allocation files. This function checks that all allocations are held correctly. It de-allocates any jobs that are finished and not de-allocated.

Note: Individual jobs can be de-allocated by using the Active Jobs enquiry; see the Active Jobs section.

Possible reasons for a job still being allocated are:

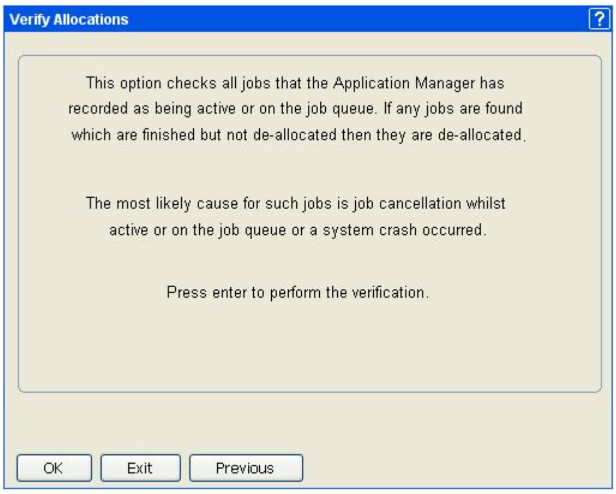
- A batch job was cancelled from the job queue.
- A batch job was cancelled whilst active.
- A workstation was switched off or shut down without the job being finished correctly.
- A total system failure occurred or a hardware malfunction occurred in the attached workstation.

Note: A malfunction which Application Manager recognises as being finished, for example an RPG or CPF error, is normally de-allocated automatically.

## Verify Allocations Window

To display this window, select **Verify Allocations** from the Utilities menu.

Use this window run the batch job which checks that all jobs are allocated correctly.



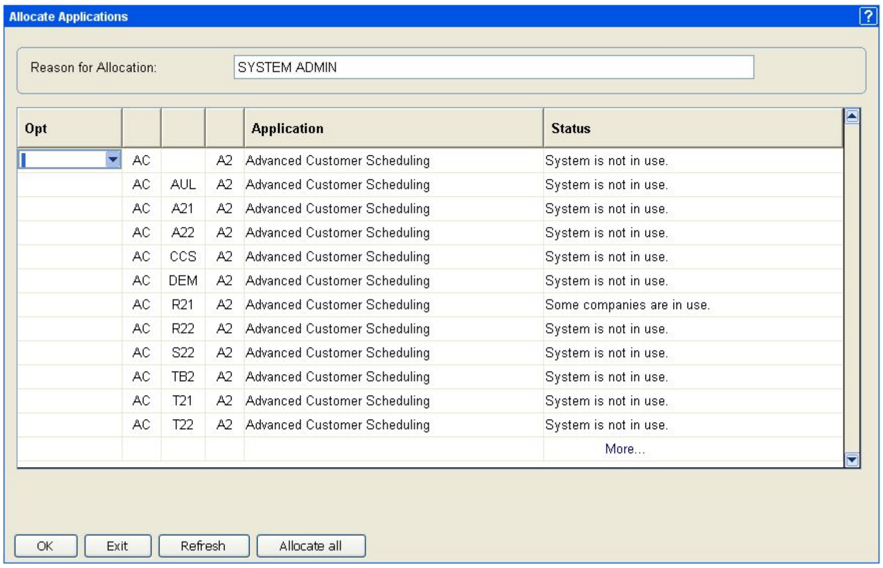

Select **OK** to clear the Application Manager allocation files of any finished jobs which have been logged (by Application Manager) as having been started, but not as finished.

# Allocate Applications

Use this option to enquire on the users signed on to a selected application, and to allocate exclusive use of an application to the Data Processing department for save or restore functions. This prevents users from signing on to that application while you are using it and allows you to de-allocate the application when you no longer need exclusive use.

## Allocate Applications Window

To display this window, select **Allocate Applications** from the Utilities menu and then select **OK**.




### Fields

#### Reason for Allocation

If you allocate applications, enter a message to appear on enquiries, detailing the reason for the allocation (for example, Backup, Restore, System Testing).

#### Option (Opt)

You can select one of the following:

Select - To enquire on users of the application, if the application is currently in use

See the Active Jobs section for full details of this enquiry.

Allocate - To allocate the application for exclusive DP use

De-allocate - To de-allocate the application when exclusive use is no longer required

#### Application

This field displays the description of the application.

### Status

This field displays the status of the application.

## Options

### Allocate

Use this to allocate the application for exclusive DP use.

It is most appropriate to use this if the status is currently '**System is not in use**'. Select **Allocate All (F7)** to allocate all applications.

### De-Allocate

Use this to de-allocate the application when exclusive use is no longer required.

Note: You may select **Allocate All (F7)** to allocate all applications even if applications are being used. This prevents users from starting any new tasks. Existing tasks are not affected.

Note: For environment exclusivity, the allocation applies only to application environments that share the same environment group.

Select the applications to allocate or de-allocate.

# Gold Copy

Use this option to copy all of the Application Manager definitions for an application (including application profile, library lists, tasks and menus) to a library.

All the data for a selected application is extracted from Application Manager and stored in a library of your choosing. You can then save this library to off-line storage ready for installation on another machine.

## Saving and Installing Application Data

Application developers use the Gold Copy process to create and maintain standard applications after completing the development. They can ship the gold copy to other processors or use it on the same processor.

An application is defined by its identity code (for example IN - Inventory, GL - General Ledger) and its release level. The version code allows the user to create a series of separate development areas or environments for the same application. It is recommended that each of these be intrinsically linked to the Standard Application, which has a blank version code. So for example, the Inventory module may be set up as follows:

Application Description: Standard Inventory

Application ID: IN

Version: Blank

Release: 01

Application Description: Inventory Test Version

Application ID: IN

Environment: TST

Release: 01

For application development purposes it is essential that different environments can be created and that any new Application Manager data can be merged with the existing standard application information. For example, developing a new function for an existing application may involve the creation of additional tasks and/or menus. These would normally be tested in an alternative environment before being transferred and subsequently released into the standard version.

### Gold Copy

Note: You can start the Gold Copy by selecting the option from the Application Manager Utilities menu or by entering the command AMGOLD.

The Gold Copy function is provided to perform two key activities:

### Activity 1

This merges Application Manager data that has been set up for either development or test purposes with the standard application data.

Note: This phase of the process is only run if the menu environment code is not blank.

The Gold Copy routine will search through Application Manager's files looking for the selected application. The following information needs to be entered in order to select an application: Application ID, Version and Release. The following data is extracted:

- Exclusivity groups
- Application profile
- Library lists
- Application tasks
- Menus

The Gold Copy function selects the menus to be extracted by first identifying all of the menus that belong to the specified menu environment and then for each of the menus selected identifying which of those menus belong to the application specified.

- Task search words

Each of the extracted elements is then matched with the standard application data. If there is a match, the existing standard information is replaced. If there is no match, the information is added to the standard application. The version code is changed to blanks.

Note: Menus normally contain application tasks. If those tasks refer to the test or development application which you are Gold Copying, the tasks are changed to refer to standard application tasks. Tasks within the menu that refer to other applications are not changed.

Note: The Gold Copy process does not delete redundant data from the standard application. You must manually remove this data after completing the Gold Copy process. For example, you may need to remove development or test libraries from the library lists.

When the Gold Copy task has completed, you should verify the new standard application using Application Manager's report, enquiry and maintenance functions to ensure that all of the library lists, application tasks, menus, etc. are correct. If you make any amendments during this verification phase, the application must be Gold Copied again.

## Activity 2

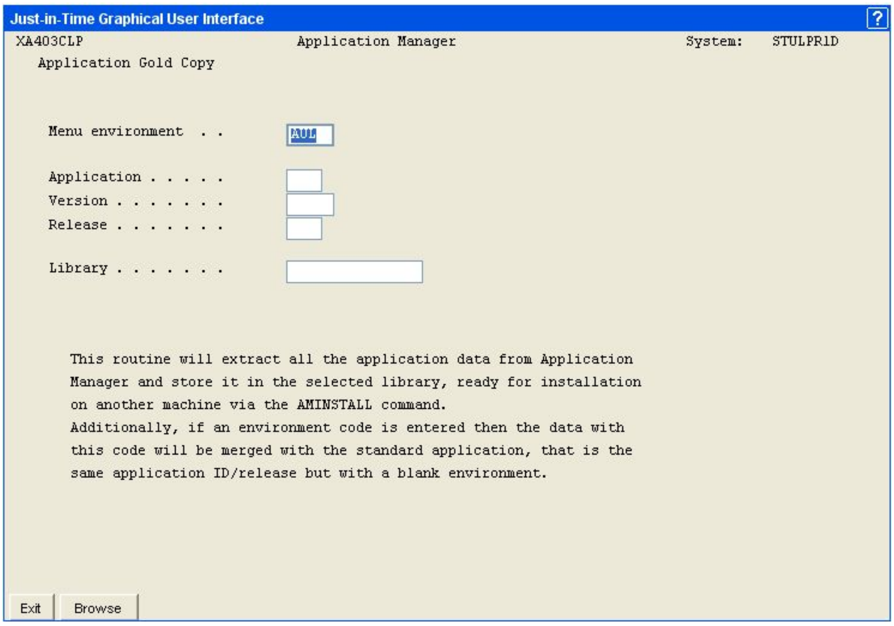
The second activity extracts the standard application data that has been generated and creates installation files. The installation files contain only the data required to run the standard application. The installation files are used by Application Manager's installation routines when an application is to be loaded on another processor. The installation files will be created in the library that was specified when the Gold Copy process was initiated. It is recommended that the installation files be stored in the Applications Program Library.

Note: The installation files are named using the format APGnnI, where nn is the corresponding Application Manager file named APGnnPHY.

Note: If you want to create the installation files and not merge Application Manager data for the processed application with the standard version, use the command AMENVGOLD. You can use this command to install a bespoke or custom application on another server.

# Application Gold Copy Window

To display this window, select **Gold Copy** from the Utilities menu and then select **OK**.




## Fields

### Menu Environment

Enter the menu for the Gold Copy. The menu selected must belong to this environment code and to the application specified below.

### Application ID

Enter the application ID of the application to be Gold Copied.

### Version

Enter the environment (version) of the application to be Gold Copied.

### Release

Enter the release level of the application to be Gold Copied.

### Library

Enter the name of the library to which the application data is to be copied.

# Saving and Installing Role Data

The role definitions, authorisations and translated descriptions are handled in a similar way to the application data.

To export the definitions, the command AMROLGOLD should be used.

## Parameters for AMROLGOLD

### Role

Enter one of the following:

### Environment

This represents the menu and task environment that is to be merged into the gold copy.

### Library

Enter the name of the library to which the data is to be exported.

### Option

Enter one of the following:

***ADD** - To add these definitions to the existing files

***REPLACE** - To clear the role files in the target library

### Type

Enter one of the following:

***ROLE** - To export the role definitions and authorisations

***LANG** - To export the translated role descriptions

***ALL** - To export both the role definitions and authorisations and the translated role descriptions

To export the definitions without merging to the blank gold copy environment, use the AMROLENV command. The parameters are the same as for AMROLGOLD but rather than merging to the blank environment the environment details will be preserved.

To install roles into a different System Manager, use the AMROLINS command.

## Parameters for AMROLINS

### Role

Enter one of the following:

### Environment

This represents the environment code used on the menus and tasks in the install files.

### Library

Enter the name of the library from which the data is to be imported.

### To Environment

Enter ***ENV** to use the environment specified above or enter the name of the environment to which the menu and task authorisations will be assigned.

### Option

Enter one of the following:

***MERGE** - To add new entries and amend existing entries

***REPLACE** - To delete existing entries and then install all details

### Insert Menus

Enter one of the following:

***YES** - If the installation library contains application installation files then any menus associated with the installed roles are also installed.

***NO** - If the installation library contains application installation files then any menus associated with the installed roles are not installed.

### Type

Enter one of the following:

***ROLE** - To import the role definitions and authorisations

***LANG** - To import the translated role descriptions

***ALL** - To import both the role definitions and authorisations and the translated role descriptions

# Chapter 10 - Execute Application Manager

# Executing Applications

Application Manager allows the software developer to use additional environments to:

- System-test amended programs without having any potential effect on the live application
- Develop bespoke or tailor-made applications
- Develop enhancements to existing applications

Each environment is identified via a three-character environment code. This relates (through the drop-through rules) to the version code and forms part of the key to access library lists, application-defined tasks, menus and menu and task authorisation.

Never alter the data associated with the standard application, which has a blank version.

As part of the installation routine, you are issued with a personal environment code or customer code. Any new library lists, application defined tasks or menus that you create or maintain should be associated with this environment code.

> Note: The Environment Usage section describes the way in which the environment code is used to access Application Manager data.

You can develop amendments, enhancements and bespoke applications in a test environment. This involves using a supplementary environment code. Use this to set up test versions of library lists, and so on.

> Note: If you create a menu or task in your environment with the same name as a standard application menu or task, when you sign on, this new version would be accessed. Remember to check the authorisation.

### System Testing Amended Programs

You must set up a new set of library lists within Application Manager using version matching and an environment code different from the default code. Replace the live data files library with the test data files library and place the test programs and display or print file libraries above their live counterparts in the library list.

### Bespoke Applications

For new applications, it is recommended that your assigned personal code be used as the version code when using Application Manager to create library lists, tasks or menus.

### Application Enhancements

Develop enhancements to existing applications using a test version code. This test environment then overlays the existing application.

# Environment Usage

When users enter Application Manager's menu driver, they can sign on and use one of two generic environments:

### Default Environment

The normal default environment (their personal environment code) is determined by the Data Area AMCUSCODE in library AULAMP3. The user can enter the default environment in a number of ways:

- By entering the command AULAMP3/AM3
- By selecting either option 1 or option 2 from the Execute Applications menu
- By having the program AULAMP3/AMINITIAL as the user's Initial Program to Call, so that when they sign on to the server, they directly enter Application Manager's menu driver.

### Non-Default (Test) Environment

An alternative environment is, for example, one used for testing or training purposes. The user can enter the alternative environment in a number of ways:

- By entering the command AULAMP3/AMT and then specifying the environment
- By selecting either option 3 or option 4 from the Execute Applications menu and then specifying the environment
- If you want users to sign on directly to an alternative environment, you must write a CL program that overrides your system's default environment code. The program should include the following statements:

```
PGM
CRTDTAARA DTAARA(QTEMP/IPGENV) TYPE(*CHAR) LEN(3) +
VALUE('XYZ')
CALL PGM(AULAMP3/AMINITIAL)
ENDPGM
```

where 'XYZ' is the environment code to be used during the session. Note that this must be in upper case. This program should then be the user's initial program specified on their server's user profile.

Application Manager will initially access menus, tasks and library lists using the version that matches the selected environment code. However, there will be occasions when the required definition does not exist. In these instances, Application Manager may use a drop-through technique in accessing the definition to use.

For example, a test environment may access the same definitions in all respects as the default live environment, except that the version of library list used contains test files libraries instead of the application live files. In this case, the only differences between the two environments are the library lists and the application profile. These are the only definitions that need to be set up for the application whose version matches the test environment code. The menus and tasks are exactly the same, and it is not necessary to define these in the test version of the application.

Application Manager has been designed to cater for alternative environments.

#### Dft

This is the default environment code: the personal code or customer code you were given when installing.

#### Tst

This can be any non-default environment code: for example, the environment code used for testing purposes.

#### Blank

Standard application definitions have a BLANK version code.

#### Vrs

This could be any other application version that is not BLANK, for example, variations of applications that are bespoke, or for development, or for testing or training.

### Menus

When a user attempts to access a menu, they will be signed on either using their default environment code or a test code. A drop-through technique is used to find the required menu.

### Tasks

For each menu option that executes an application task, the Application Code, Version and Release Level are specified. The version may be blank (for a standard application task), or something else (a version of the application that is bespoke, or for development, or testing or training).

The following table shows the way in which Application Manager determines the version code to use when accessing menus, tasks and library lists.

| User Env. | Task Version | |
|---|---|---|
| | BLANK | VRS |
| DFT | DFT<br>BLANK | VRS |
| TST | TST<br>BLANK | TST<br>VRS |

### Library List

Once the version of a task has been chosen, according to the above rules, this will be used to determine the version of the library list to be used. This is described in the following table:

| User Env. | Task Version | | | |
|---|---|---|---|---|
| | BLANK | DFT | VRS | TST |
| DFT | DFT<br>BLANK | DFT<br>BLANK | VRS<br>BLANK | - |
| TST | TST | TST | TST | TST |

This gives the following combinations of task/library list environment.

### For a DFT User

| | Menu Task Version Requested | Task Version Processed | Library List Version |
|---|---|---|---|
| 1. | Menu Task BLANK | DFT exists, use DFT | DFT exists use DFT<br>No DFT, use BLANK |
| | Menu Task BLANK | No DFT, use BLANK | DFT exists use DFT<br>No DFT, use BLANK |
| 2. | Menu Task VRS | VRS | VRS exists use VRS<br>No VRS, use BLANK |

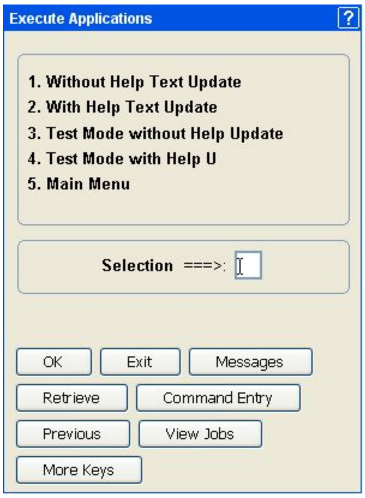
### For a TST User

| | Menu Task Version Requested | Task Version Processed | Library List Version |
|---|---|---|---|
| 1. | Menu Task BLANK | TST exists, use TST | TST |
| | | No TST, use BLANK | TST |
| 2. | Menu Task VRS | TST exists, use TST | TST |
| | | No TST, use VRS | TST |

Note: The menu enquiry provides an excellent method of finding out which tasks and library list code will be used.

## Execute Applications Main Menu

To display this menu, select **Execute Applications** from the Application Manager Main menu.



## Functions

### Messages (F6)

Use this to display all messages for the user.

### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

### View Jobs (F14)

Use this to display all jobs for the user.

### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Application Manager Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

Select the option you require and then select **OK**.

Select **Main Menu** or **Previous (F12)** to return to the Application Manager Main menu. Select **Exit (F3)** to leave Application Manager.

# Execute Applications without Help Text Update

Select **Without Help Text Update** from the Execute Applications menu.

Use this option to sign on to the applications running under the control of Application Manager.

Your initial menu is displayed as specified in your user profile (see the User Profiles section of the Administration Functions product guide). Alternatively, if your profile has been established with a default application task, this is initiated.

To enter Application Manager you must have:

- Created your user profile with an initial menu or a single task specified
- Granted user authority to options on the menu or to the single task
- Entered the valid Application Manager authorisation code(s) to enable the application(s)
- Granted user authority to companies within the applications

If you have signed on to a menu, you can do the following:

- Enter an option in the Option field and press Enter.
- Select a function.
- If the application task search facility is available as a function of the menu, enter the search key words and press Enter.
- Enter a valid command in the Option field, if you have been authorised to enter commands on your Application Manager user profile.
- Use expert mode. This takes you to another menu or directly into an option on another menu. To do this, enter a command in the form: OO/MMM.

(Where OO is the option number, if required, and MMM is the menu name. In order to go to a menu, simply enter: /MMM)

For a further explanation of these facilities, see the Maintain Menus section.

Note: You automatically enter your default environment when you access Application Manager in this way.

# Execute Applications with Help Text Update

This procedure provides the same facilities as described in the Execute Applications without Help Text Update section, with the additional ability to maintain the provided Help Text.

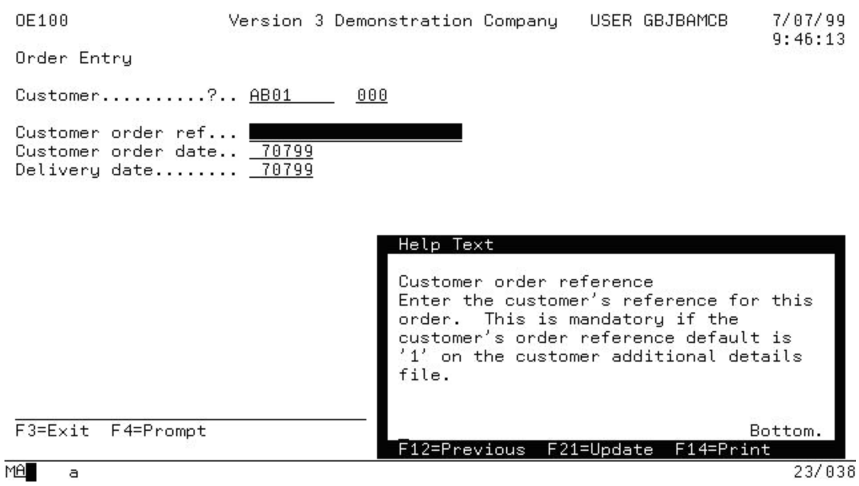
Field level Help is available throughout the range of applications. You can display Help by pressing either the **Help** or **F1** keys. Not only is standard application Help Text available, but it may be extended by the user. The Help is displayed in a variable size pop-up positioned on the window so that it does not obscure the field for which it is providing information.

Note: Online Help is now issued as part of Workspace. Help is no longer issued from Application Manager, although this function remains so that bespoke help can be added.

## Help Text Pop-up

You can display the Help Text pop-up from any window in System21 applications. Position the cursor on the field you are enquiring on and press **Help** or **F1**. The appropriate Help Text pop-up is displayed.

This is an example of a Help Text pop-up selected against one field on the Order Entry window.




### Functions

#### F21=Update

If the Help Text definition of this window has been created and Help Text exists, the text will be displayed. Select **F21=Update** to maintain the text.

If the Help Text definition of this window has been created but no text currently exists, select **F21=Update** to create text.

If you decide to maintain Help Text, the changes you make are held in your own user Help files. The standard Help files are not updated. When you next display the Help, you will see your changes.

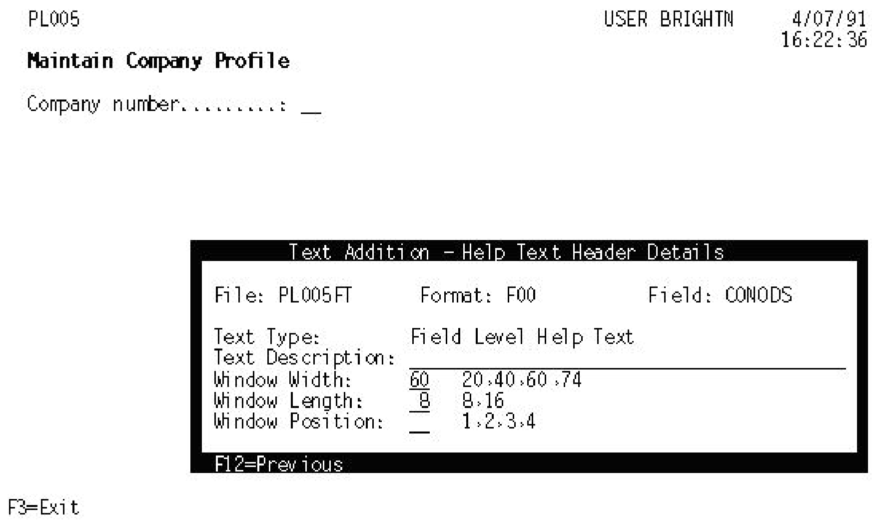
Note: If you are working on an Infor development machine, a window may be displayed, asking you whether you wish to maintain standard or user text.

You can also maintain window-level and function Help. Window-level Help is displayed by selecting **F2** on a field-level Help window. If no text exists and you select **F21=Update**, you can maintain text.

# Text Addition Help Text Header Details Pop-up

To display this pop-up, select **With Help Text Update** from the Execute Applications menu. The initial window is displayed; select a menu option there. With the cursor on the required field, select **F1** to look at the current Help Text (if any). Then select **F21=Update** to make changes. If Help Text does not exist, this function will be labelled **F21=Enter Text**. Select it to add new text.

Use this window to enter the Help Text header details.




## Fields

### Text Description

Enter a description of the Help Text topic.

### Pop-up Width

Enter the required width of the Help Text pop-up; the value is given as the number of characters.

### Pop-up Length

Enter the number of lines to be occupied by the Help Text pop-up.

### Pop-up Position

Enter one of the following to indicate the window position for the Help Text pop-up:

1 - For the top left corner of the window

2 - For the top right corner of the window

3 - For the bottom right corner of the window

4 - For the bottom left corner of the window

If this field is left blank, the Help Text pop-up position automatically defaults to the opposite corner of the window from the current cursor position.

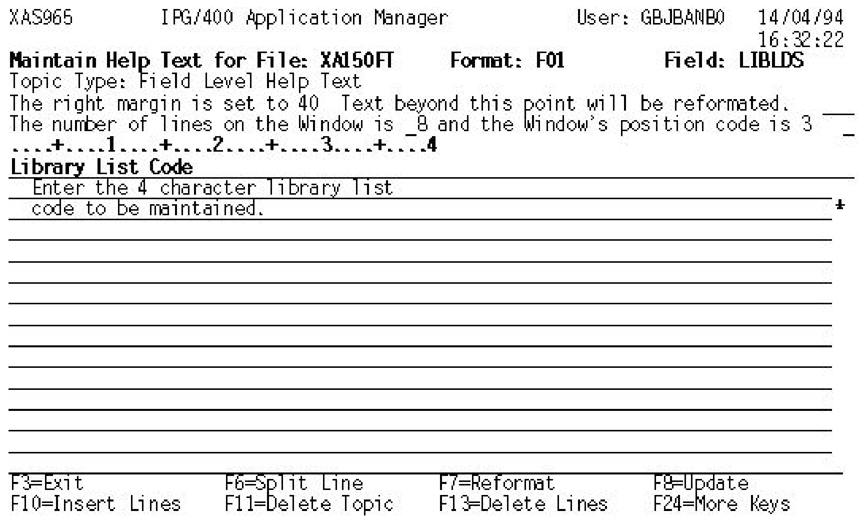
→ Press **Enter** to display the Maintain Help Text for File window.

# Maintain Help Text for File Window

To display this window, press **Enter** on the Text Addition Help Text Header Details pop-up.

Alternatively, select **With Help Text Update** from the Execute Applications menu. The initial window is displayed; select a menu option. With the cursor on a field, press **F1** to look at the current Help Text (if any). Then select **F21=Update** to make changes.

Use this window to amend or add to the Help Text.




## Functions

### F6=Split Line

Use this to split the text line at the cursor position. The section to the right of the split is moved down one line, in the same position.

### F7=Reformat

Use this to re-format the paragraph to the pop-up width specified.

### F10=Insert Line

Use this to insert extra blank lines above the cursor within the body of the text.

### F11=Delete Topic

Use this to delete all the Help Text lines.

### F13=Delete Lines

Use this to delete lines (starting at the line with the cursor) from within the body of the text.

### F14=Highlight

Use this to toggle the text line between normal and highlighted display.

### F15=End Paragraphs

Use this to place an asterisk (*) at the edge of a window to show the paragraph end. This prevents pagination of the line when reformatting.

**F16=Copy Text**

Use this to copy the Help Text topic specified for another field.

**F17=Browse Program**

Use this to specify a browse or list program for this field. This is only available for field level Help.

**F22=Function**

Use this to switch between the maintenance of text at window and function key level. This function is only available for window level Help.

When you have finished entering the Help Text, press **Enter**. The next window displays your Help Text in its appropriate window position.

# Test Mode without Help Text Update

Use this option to enter Application Manager and use the facilities described in the Execute Applications without Help Text Update section. However, with this option you can change the environment code from your default personal environment code.

## Test Mode without Help Text Update Pop-up

To display this pop-up, select **Test Mode without Help Update** from the Execute Applications menu and then press **Enter**.

Use this window to enter the environment you want to access.


Enter the new environment code, for example, to change to a test environment. Press **Enter** to display your initial menu.

# Test Mode with Help Update

Use this option to enter Application Manager and use the facilities described in the Execute Applications with Help Text Update section, but to change the environment code from your default personal environment code.

## Test Mode with Help Environment Pop-up

To display this pop-up, select option **Test Mode with Help Update** from the Execute Applications menu and then press **Enter**.

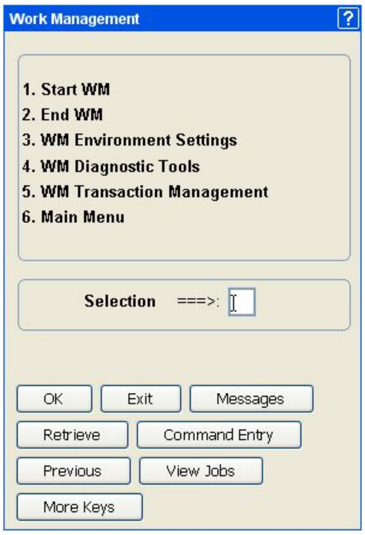
Use this window to enter the new environment.


Enter the new environment code, for example to change to a test environment. Press **Enter** to display your initial menu.

# Chapter 11 - Work Management

# Work Management Main Menu

To display this menu, select **Work Management** from the Application Manager Main menu.




## Functions

### Messages (F6)

Use this to display all messages for the user.

### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

### View Jobs (F14)

Use this to display all jobs for the user.

### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Application Manager Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

Select the option you require and then select OK.

Select Main Menu or Previous (F12) to return to the Application Manager Main menu. Select Exit (F3) to leave Application Manager.

# Start WM

Once you have installed Work Management (WM), you can start it by taking the Start WM option within Application Manager. The Work Management engine runs in a subsystem on the server.

You can start and end WM by including commands to control WM in the Auto Day Start (ADS) and the Auto Day End (ADE) functions of Machine Manager.

> Tip: You could make this part of your daily automatic day start routine.

You can also use the command line to start and stop WM, bypassing all interactive display processing.

To start WM, at the command line enter:

STRWM [ENV]

To stop WM, at the command line enter:

ENDWM [ENV]

where [ENV] is the environment in which you want to start or stop WM.

Examples:

STRWM TST

ENDWM TST

> Tip: If you do not enter an environment, the default environment is used.

> Note: The user who submits the STRWM job must be fully authorised to run any application or task that the engine runs automatically. If the user is not fully authorised, the software writes WM Error records to WFP97 and you will need to recover transaction records.

Within WM there are four separate processes, or jobs:

- WM Engine

The WM Engine is central to processing the automatic flow and control of documents, activities and tasks in Infor's Active Enterprise Series. The Engine schedules new tasks by putting them in a queue for automatic execution, or adds them to an Action List in Workspace. The Engine supports parallel and serial execution of tasks.

- Subsystem

The Work Management Engine runs in a subsystem on the server. This subsystem must be started for background processing of the Engine, Scheduler and Escalation and Delegation to run. When you end the subsystem, all background processing is stopped.

- Scheduler

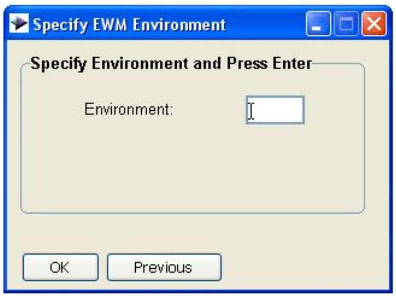
The Scheduler is a background processor that, working with the schedule rules, identifies when pending transactions should be processed. Scheduler adds those tasks to the job queue at the appropriate time.

- E/D Processor

Escalation and Delegation take effect in the Workspace User's Action List. You use @ctive Modeler to configure Escalation and Delegation rules as part of Work Management. For further details, refer to the @ctive Modeler product guide.

## Select WM Environment Pop-up

To display this pop-up, select **Start WM** from the Work Management menu.




### Fields

#### Environment

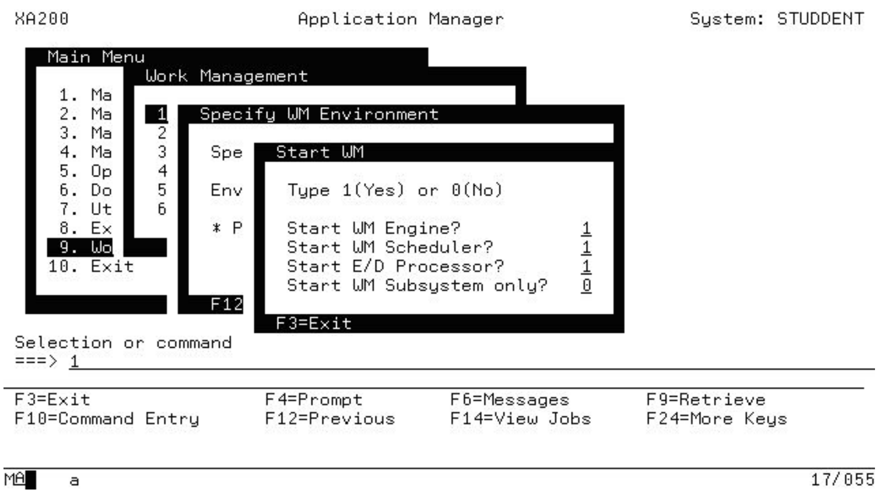
Enter the environment for which you wish to start Work Management.

Select **OK** to display the Start EWM pop-up.

# Start EWM Pop-up

To display this pop-up, select **OK** on the Select WM Environment pop-up.

Use this pop-up to start the WM subsystem, engine, scheduler and E/D Processor. You can start any combination of the Engine, the Scheduler or the Processor with the subsystem.




## Fields

### Start WM Engine

Enter one of the following:

0 - Not to start the WM Engine

1 - To start the WM Engine

You must also start the WM subsystem.

### Start Trigger Monitor

Enter one of the following:

0 - Not to start the WM Trigger Monitor

1 - To start the WM Trigger Monitor. This starts a background job to monitor the status of MQ. In the normal state of MQ active there is little activity. When the connection to MQ is lost, the trigger routine writes the trigger messages to database. The trigger recovery program monitors MQ and detects when it has become available again. All entries are then transferred to MQ and then the trigger routine is notified that it should resume writing to MQ.

### Start WM Scheduler

Enter one of the following:

0 - Not to start the WM Scheduler

1 - To start the WM Scheduler

You configure schedule rules in @ctive Modeler to decide which tasks should run and when they should run. For more information, refer to the @ctive Modeler product guide.

Note: You do not need to load Machine Manager for WM Scheduling to operate.

### Start E/D Processor

Enter one of the following:

0 - Not to start the E/D Processor

1 - To start the E/D Processor

The Escalation and Delegation Processor runs tasks started by users. For more information on Escalation and Delegation, refer to the @ctive Modeler product guide.

### Start WM Subsystem Only

Enter one of the following:

0 - Not to start the WM subsystem

1 - To start the WM subsystem

You must start the subsystem if you want to start any of the other three options.

Select **OK** to display a confirmation pop-up and then select **F8=Submit** to submit the job and return to the Work Management menu.

# End WM

Select this option to end the processing of Work Management (WM).

You can also use the command line to stop WM. At the command line enter:

ENDWM [ENV]

where [ENV] is the environment in which you want to stop WM.

Example:

ENDWM TST

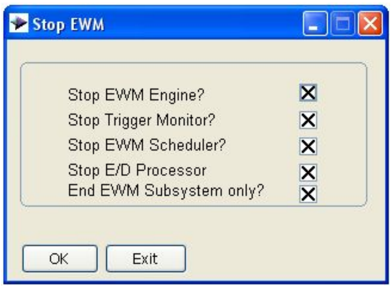
Tip: If you do not enter an environment, the default environment is used.

Tip: You can end the subsystem as part of your daily automatic day end routine, before starting overnight processing. Refer to the Machine Manager product guide for more details.

## Stop WM Pop-up

To display this pop-up, select the End WM option from the Work Management menu. Enter the environment in the Select WM Environment pop-up as above.

Use this pop-up to stop background processing for the WM Engine, the subsystem, the Scheduler and the E/D Processor.




### Fields

**Stop EWM Engine**

Use this checkbox as follows:

Unchecked - To leave the EWM Engine running

Checked - To stop the EWM Engine

**Stop Trigger Monitor**

Use this checkbox as follows:

Unchecked - To leave the Trigger Monitor running

Checked - To stop the Trigger Monitor

**Stop EWM Scheduler**

Use this checkbox as follows:

Unchecked - To leave the EWM Scheduler running

Checked - To stop the EWM Scheduler

**Stop E/D Processor**

Use this checkbox as follows:

Unchecked - To leave the E/D Processor running

Checked - To stop the E/D Processor

**End EWM Subsystem Only**

Use this checkbox as follows:

Unchecked - Not to end the EWM subsystem

Checked - To end the EWM subsystem

When you end the subsystem, the other three functions are also ended.

Select **OK** to display a confirmation pop-up and then select **Submit (F8)** to submit a job to stop the requested processes.

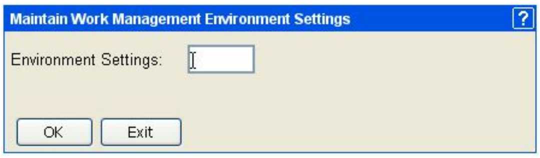
# WM Environment Settings

Use this option to set up one or more environments to use with Work Management. For example, you could add environments for testing and training on the software.

You must define library lists for each environment.

## Select Environment Window

To display this window, select **Environment Settings** from the Work Management menu.




### Fields

#### Environment Settings

Enter the environment required.

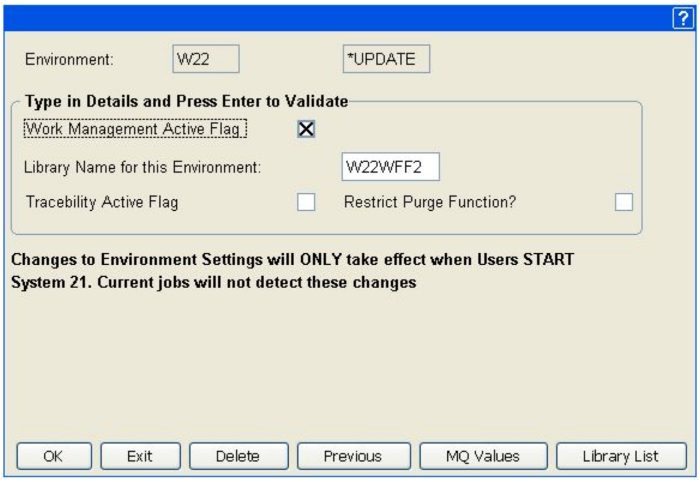
Select **OK** to display the Maintain Work Management Environment Settings window.

# Maintain Work Management Environment Settings Window

To display this window, select **OK** on the Select Environment window.

Use this window to activate Work Management and enter the library and other details for your selected environment.

Note: Changes to environment settings will only take effect when you start new application jobs. Current jobs do not detect these changes.




## Fields

### Work Management Active Flag

Use this checkbox as follows:

Unchecked - If Work Management is not active with this environment

Checked - If Work Management is active with this environment

Tip: If you want to de-activate an environment, uncheck this field rather than deleting the environment. You can also set environments up in advance by unchecking this field and then checking it when you need to use them.

### Library Name for this Environment

Enter the WM files library that this environment will use.

Every environment you set up must use a different WM files library.

Tip: It is recommended that the AULWFF3 library is not used as an environment library, instead copy it to an environment specific library e.g. xxxWFF3 where xxx is the environment

Note: You can use **Library List (F20)** to define a library list.

### Traceability Active Flag

Use this checkbox as follows:

Unchecked - If traceability is not active

Checked - If traceability is active (the trace is written to file WFP95)

Note: This field should only be used by technical support staff.

### Restrict Purge Function

Use this checkbox as follows:

Unchecked - Not to prevent users from deleting data

Checked - To prevent users from running the Transaction Purge task for the selected environment

This prevents the accidental deletion of live data.

## Functions

### MQ Values (F16)

Use this to display the Maintain Work Management MQ Settings window, which allows you to specify the queues and queue manager that the Work Management Engine and the Database Trigger program should use.

### Library List (F20)

Use this to define a library list to use for data determination in this environment. You must define a library list for every active environment, that is, where you **checked** the Work Management Active field.

Note: You do not need to add a Work Management files library, as WM does it for you.

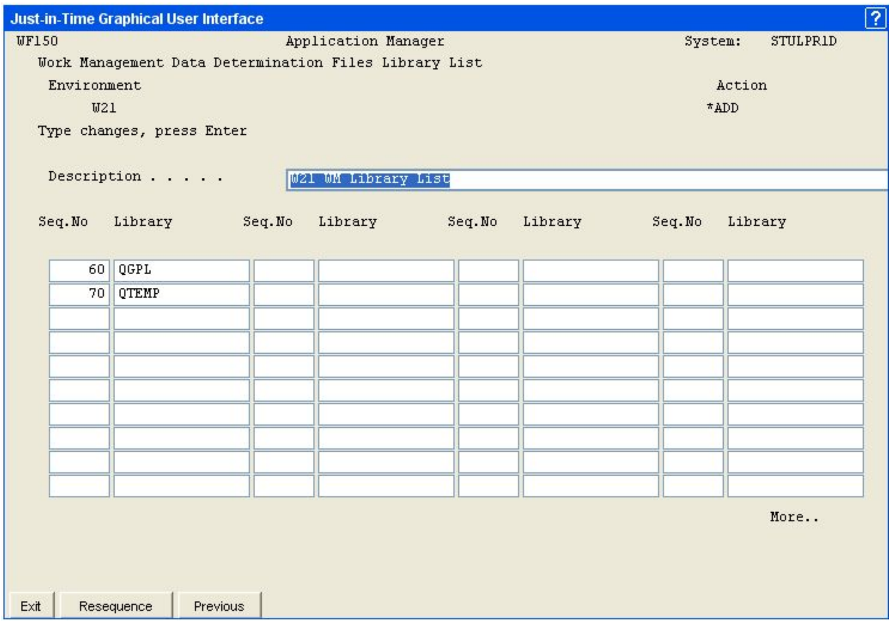
Select **Library List (F20)** to display the Work Management Data Determination Files Library List window.

# Work Management Data Determination Files Library List Window

To display this window, select **Library List (F20)** on the Maintain Work Management Environment Settings window.

Use this window to add or amend the libraries you use for Work Management data.

Note: You do not need to add a Work Management files library, as WM does it for you.




## Fields

### Description

Enter a description for the library list. The system default is the environment you entered on the Maintain Environment Selection window followed by the phrase 'WM (Work Management) Library List'.

### Seq No

You must enter a sequence number for each library.

The system uses this to sequence the libraries you enter. This overrides the order in which you enter the libraries.

Select **OK** to display the libraries by sequence number.

You are advised to use numbers in steps of five or ten. This means that if you omit a library, for example between 10 and 20, you can enter it with a sequence of 25. If you need to enter more than one library between two existing libraries, enter them one at a time, pressing **Enter** to re-sequence the library list between each entry.

### Library

Enter the files libraries you want to use for data determination within this environment.

Manual tasks and action agents use file fields to retrieve data. This library list determines the library from which the file will be accessed.

### Functions

#### F5=Resequence

Use this to re-sequence the library list and re-number it in steps of 10.

Select **OK** and then select **F3=Exit** to leave the option. You are prompted to save or abandon your changes.

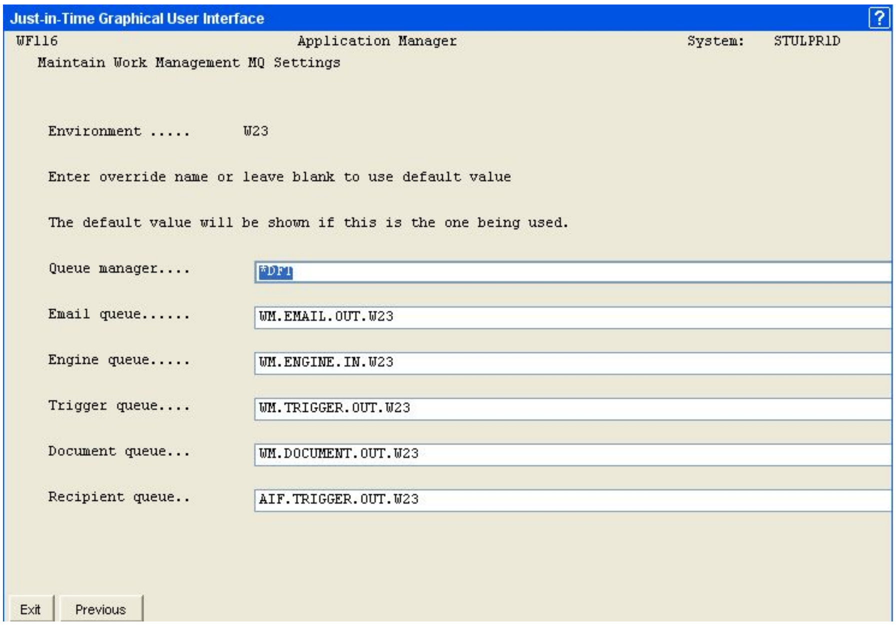
## MQ Values

Use this to specify the queues and queue manager that the work management engine and the database trigger program should use.

# Maintain Work Management MQ Settings Window

To display this window, select **MQ Values (F16)** on the Maintain Work Management Environment Settings window.

Use this window to specify the queues and the queue manager that the Work Management Engine and the Database Trigger program should use. The queues which are used by default have the environment at the end of the name. For example, the default queue for the engine to use in environment AUL is now WM.ENGINE.OUT.AUL. If any other queue is to be used, you will have to specify it on this window.




## Fields

### Queue Manager

Enter the name of the queue manager that is to be used for this environment.

### E-Mail Queue

Enter the name of the queue to which e-mail messages are to be sent.

### Engine Queue

Enter the name of the queue to which engine messages are to be sent.

### Trigger Queue

Enter the name of the queue to which trigger messages are to be sent.

### Document Queue

Enter the name of the queue to which document handler messages are to be sent.

### Recipient Queue

Enter the name of the queue to which inter.connect messages are to be sent.

Select **OK** to update the MQ details.

Note: You will need to create the MQ queues within your chosen queue manager. Please refer to the process.connect installation guide for details.

# EWM Transaction Recovery

Use this to enquire on and, if required, re-submit any batch jobs that were submitted under Work Management control, but which:

- Were deleted from the job queue before they started
- Ended abnormally.

Note: Before you run this option, make sure that no transactions are currently active.

If you re-submit the batch jobs, the status of the associated WM transaction record is re-set to Pending.

If the job was deleted from the job queue and did not even start, you can use this option to re-submit the job.

If the job ended abnormally, this option does not automatically re-submit it. It sets the status to Recovered, which means that the job completes normally when you re-run it manually.

You can use the WMRECOVER command to re-set and re-submit automatically any batch jobs that ended while in a job queue. Use this as a day end procedure, to clear the job queues before the day end procedures are run.

You should also run this command immediately after the Start Work Management (STRWM) command in the day start procedures. This makes sure that all the jobs that missed the day end procedures are run before users start work.

The syntax for this command is:

WMRECOVER([ENV])

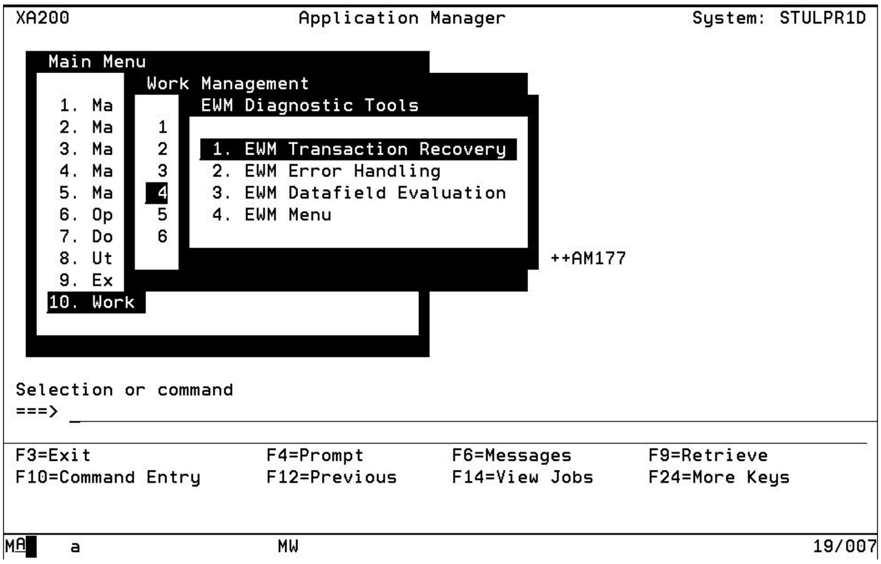
Where [ENV] is the environment

For example:

WMRECOVER(TST)

## EWM Diagnostic Tools Menu

Select **WM Diagnostic Tools** from the Work Management Main menu to display this menu.




## Functions

### Messages (F6)

Use this to display all messages for the user.

### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

### View Jobs (F14)

Use this to display all jobs for the user.

### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Application Manager Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

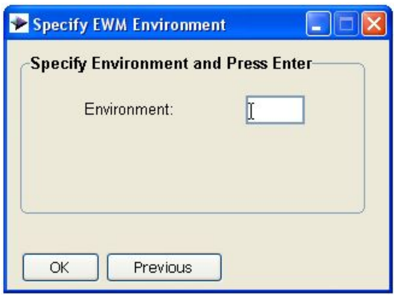
Enter the option you require and then select **OK**.

Select Main Menu or **Previous (F12)** to return to the Work Management Main menu. Select **Exit (F3)** to leave Application Manager.

# Specify WM Environment Pop-up

To display this pop-up, select **EWM Transaction Recovery** from the EWM Diagnostic Tools menu.

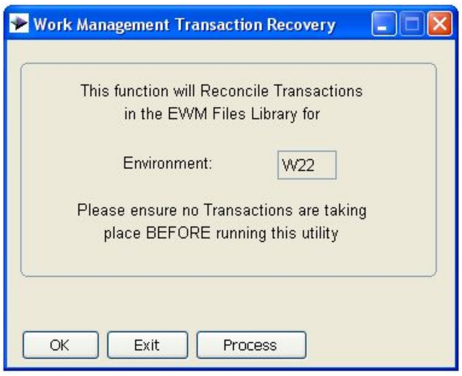
Use this pop-up to confirm the environment.




Select **OK** to display the Work Management Transaction Recovery Confirmation pop-up.

# Work Management Transaction Recovery Confirmation Pop-up

To display this pop-up, select **OK** on the Work Management Transaction Recovery pop-up.

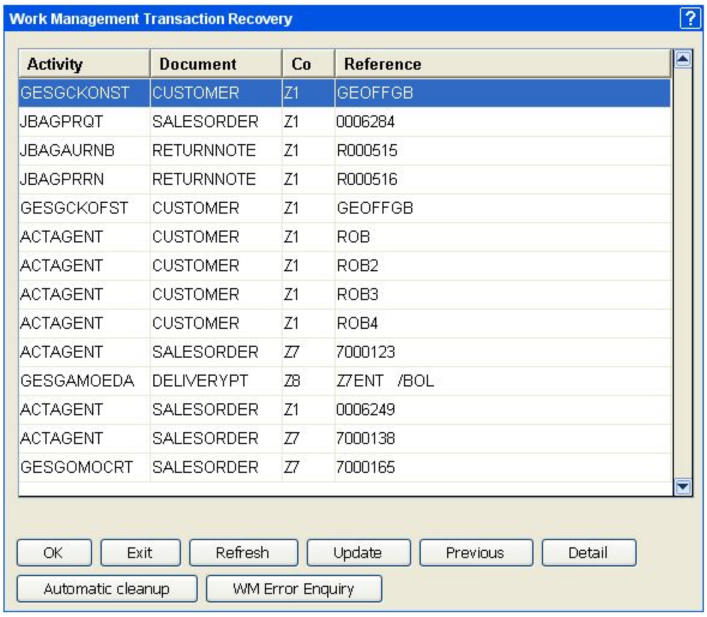



Select **Process (F8)** to display the Work Management Transaction Recovery window.

# Work Management Transaction Recovery Window

To display this window, select **Process (F8)** on the Work Management Transaction Recovery pop-up.

This window lists all the jobs for the selected environment that were never processed, deleted from the job queue before running, or ended abnormally. For each job, the activity, document, company and reference are displayed.




| Activity | Document | Co | Reference |
|---|---|---|---|
| GESGCKONST | CUSTOMER | Z1 | GEOFFGB |
| JBAGPRQT | SALESORDER | Z1 | 0006284 |
| JBAGAURNB | RETURNNOTE | Z1 | R000515 |
| JBAGPRRN | RETURNNOTE | Z1 | R000516 |
| GESGCKOFST | CUSTOMER | Z1 | GEOFFGB |
| ACTAGENT | CUSTOMER | Z1 | ROB |
| ACTAGENT | CUSTOMER | Z1 | ROB2 |
| ACTAGENT | CUSTOMER | Z1 | ROB3 |
| ACTAGENT | CUSTOMER | Z1 | ROB4 |
| ACTAGENT | SALESORDER | Z7 | 7000123 |
| GESGAMOEDA | DELIVERYPT | Z8 | Z7ENT /BOL |
| ACTAGENT | SALESORDER | Z1 | 0006249 |
| ACTAGENT | SALESORDER | Z7 | 7000138 |
| GESGOMOCRT | SALESORDER | Z7 | 7000165 |

## Fields

## Functions

### Refresh (F5)

Use this to restore the window to the way it was when you first entered it in this session.

### Detail/Summary (F14)

Use this to toggle between displaying one line of summary information about the job and displaying three lines, which include the reason why the job ended.

### Automatic Cleanup (F16)

Use this to re-submit any jobs that ended before they were processed. It also re-sets any jobs that ended abnormally, so that you can manually re-submit them.

### WM Error Enquiry (F22)

Use this to list all WM errors. This also displays details of the activity, document involved, the company and transaction reference.

## Options

### Resubmit

Use this to re-submit a job for processing.

Select **Update (F8)** to complete the re-submission.

# EWM Error Handling

Any errors reported by WM are reported in the error handler. Error manual activity (EMA) messages are also posted on the Action Tracker.

The error handler is the central point of any issues that occur. You can use enquiries to help trace the cause of the issue. The information in EMAs provides more precise information for the individual error.

Each error belongs to a transaction and an activity. Each activity has an error role defined within @ctive Modeler.

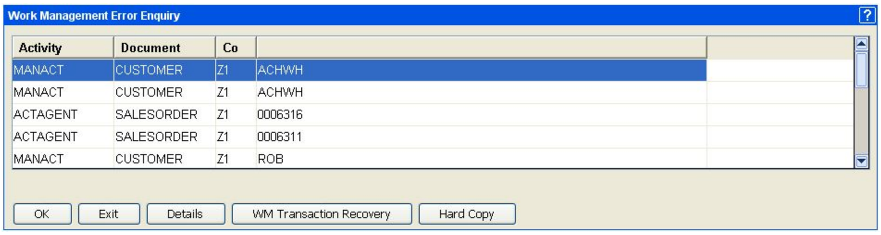
When an error occurs, an Action List record is posted to the error role for the activity concerned (provided that one does not exist already).

## Work Management Error Enquiry Window

To display this window, select **EWM Error Handling** from the EWM Diagnostic Tools menu. Enter the required environment in the Specify WM Environment pop-up and then select **OK**.

This enquiry links to the error handler, but only shows the transactions that have an activity error role matching the role being used in the Explorer Action List at that time.

For each job, the activity, document, company and reference are displayed.




### Options

**Enquire**

Use this to display the task details.

#### Trace Data

Use this to display the trace details.

These include references, schedule rules, Business Process, recipient details and WM thread details.

#### Back Out of WM Control

Use this if you do not want to include this activity in the WM engine activity.

You must confirm this selection.

#### Delete

Use this to delete this activity.

You must confirm this selection.

#### Display Job

Use this to display the job details.

You must be authorised to view the job details.

## Functions

#### Details/Summary (F14)

Use this to toggle between displaying a summary and detailed display. The details include errors, message text, date and time.

#### WM Transaction Recovery (F22)

Use this to display the batch jobs submitted under WM Control but deleted from the job queue before they were started, or were abnormally ended. You can then enquire on jobs or select jobs to re-submit.

#### Hard Copy (F24)

Use this to print the full details of the listed tasks.

Note: The action list record is only removed if you delete all transaction error records from the error handler for that error role code.

Select **Exit (F3)** to leave this window.

# EWM Datafield Evaluation

Note: You set up Data Fields in the Work Management Section, selected from the Configure menu in @ctive Modeler. For more details, refer to that documentation.

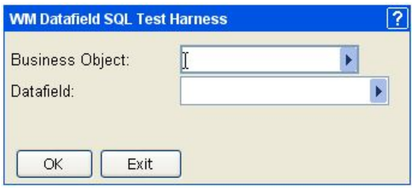
One of the most common errors is a failure to evaluate correctly a data variable defined in @ctive Modeler. This is especially true for SQL-defined data variables.

To help the design process, you can enter your activated variables using this option and then run the evaluation. This proves your variables before using them within a Business Process.

## WM Datafield Select Window

To display this window, select **EWM Datafield Evaluation** from the EWM Diagnostic Tools menu. Enter the required environment in the Specify WM Environment pop-up and then select **OK**.

Use this window to select the Business Object and Datafield required.




### Fields

#### Business Object

Enter the business object to test.

Alternatively, use the prompt facility to select from the Business Object/ Datafield Selection pop-up.

#### Datafield

Enter the datafield to test

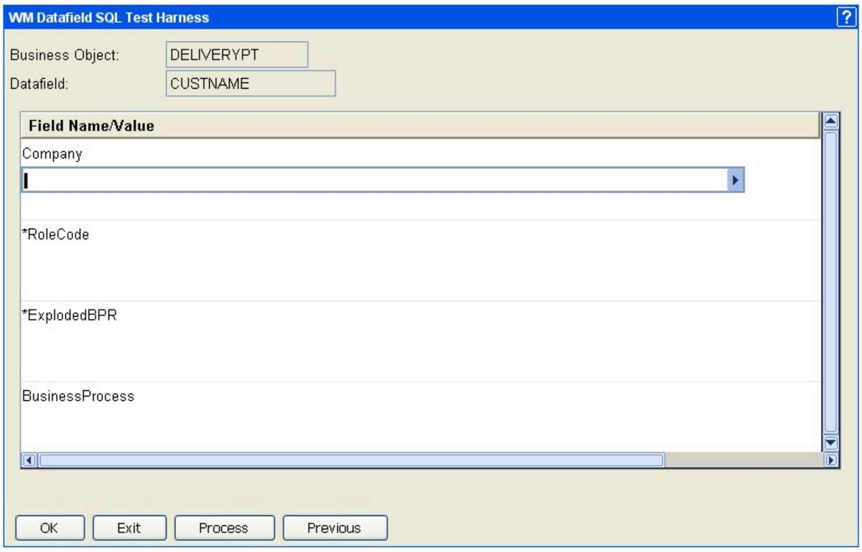
Alternatively, use the prompt facility to select from the Business Object/ Datafield Selection pop-up.

Select **OK** to display the WM Datafield SQL Test Harness window.

# WM Datafield SQL Test Harness Window

To display this window, enter a business object and datafield and then select **OK** or select a business object and datafield on the WM Datafield Select window.

Use this window to test the syntax used before entering variables into a Business Process.




## Fields

### Field Name/Value

The exact field names displayed depend upon the business object and datafield selected.

Enter the parameters you want to use to within the Business Process. The exact information required depends upon the business object and datafield selected.

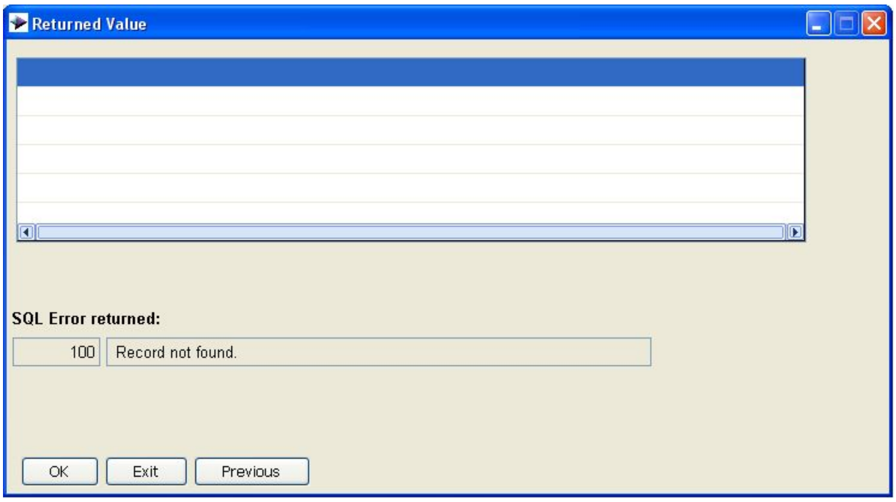
For example, if the field is *DOC, enter the required document number.

Select **Process (F8)** to test the data. The findings are displayed in the Returned Value pop-up.

# Returned Value Pop-up

To display this pop-up, select **Process (F8)** on the WM Datafield SQL Test Harness window.

This pop-up displays the results of the syntax test. If there is an error, the pop-up displays the error number.




Select **Previous (F12)** to return to the previous window or select **Exit (F3)** to return to the menu.

# EWM Transaction Management

Work Management Transaction Management has two purposes. You can use it as a maintenance activity to set up your archiving defaults for an overnight archive run, and to run a one-off archive.

You should archive frequently to clear down the WM Transaction file. This makes sure the Work Management Engine and Action Tracker or Action List functions run as efficiently as possible.

Once tasks are completed, you only need to use the tracker information for analysis. If you want to analyse the tasks, use the Performance Extract activity to extract the required information. For more information, refer to the Performance Extract section.

Archiving is a two-step process. You can archive data from the live files to history files and then from the history files to archive files. Transaction details and transaction completion details are copied to the history file.

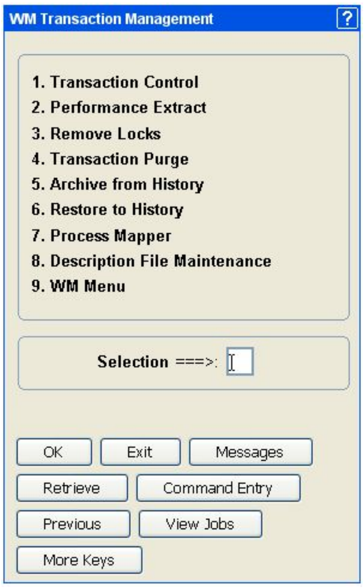
A second run through the file selects data that was previously copied to the history file and deletes it.

This dual files approach, together with the Elapsed Days function, gives you control over when the live data is archived and when it is deleted.

> Note: Only transactions of Status 3 (Completed), 5 (Reassigned), 7 (Error Messages), 8 (Backed out of WM) and 9 (Cancelled) are selected for archive.

# WM Transaction Management Menu

To display this menu, select option **WM Transaction Management** from the Work Management Main menu.




## Functions

### Messages (F6)

Use this to display all messages for the user.

### Retrieve (F9)

Use this to retrieve the previous command.

Note: This function is only available in a GOB session.

### Command Entry (F10)

Use this to display a command entry window.

Note: This function is only available in a GOB session.

### View Jobs (F14)

Use this to display all jobs for the user.

### View Prints (F18)

Use this to display all spool files for the user.

### Select Application (F22)

Use this to select an application. If you use this and then select **Maintain Application** from the Application Manager Main menu, the selected application is directly available for maintenance.

### More Keys (F24)

Use this to display the functions not currently on the display.

Enter the option you require and then select **OK**.

Select WM Menu or **Previous (F12)** to return to the Work Management menu. Select **Exit (F3)** to leave Application Manager.

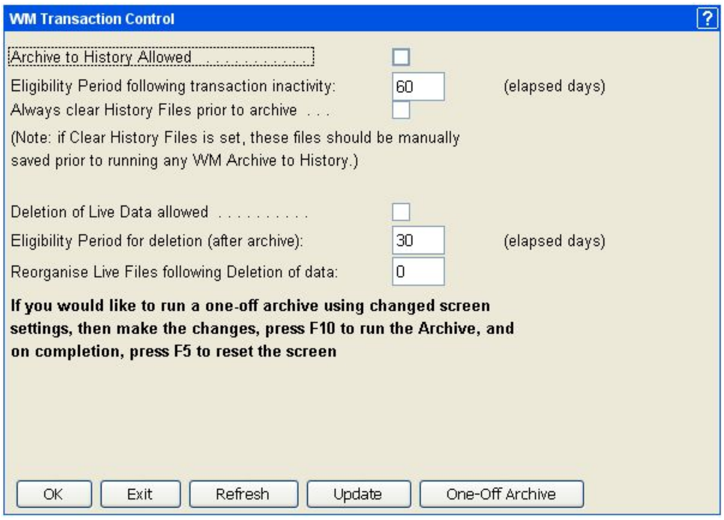
# WM Transaction Control

## WM Transaction Control Window

To display this window, select **Transaction Control** from the Work Management menu. Enter the required environment in the Specify WM Environment pop-up and then select **OK**.

Use this window as follows:

1. Set up the defaults for Machine Manager.
2. Run a one-off archive using different data. To do this, you change the data and select One Off Archive (F10). Select Refresh (F5) to revert the set up to the last saved details.




### Fields

#### Archive to History Allowed

Use this checkbox as follows:

Unchecked - To prevent archive to history

Checked - To archive the selected live data items to the history file

#### Eligibility Period Following Transaction Inactivity

Enter the age of transactions you want to select. The default is 60 elapsed days but you can change this to any number from 5 to 999.

#### Always Clear History Files Prior to Archive

Use this checkbox as follows:

Unchecked - To add the next archive to the existing history file

Checked - To delete the history file before this archive is added

Tip: You can accumulate the data in the history files and then clear it, for example, every Friday.

Note; If you **check** this, make sure you save the history files manually before you run any WM Archive to History.

### Deletion of Live Data Allowed

Use this checkbox as follows:

Unchecked - Not to delete previously archived data

Checked - To delete the previously archived data, if it is within the total number of elapsed days

**Warning: You can delete data without archiving, but it is not recommended.**

### Eligibility Period for Deletion (After Archive)

If you allow the deletion of live data, enter the number of days (between 5 and 999) after archiving that the data will be deleted. This defaults to 30 elapsed days. This is in addition to the number of days elapsed before archive to history.

For example, with the Eligibility Period Following Transaction Inactivity field set to 60 and the Eligibility Period for Deletion field set to 30, data is archived after 60 days. 30 days after being archived, the data is deleted.

Note: Live files here refer to the Work Management transaction files.

### Reorganise Live Files Following Deletion of Data

Enter one of the following:

0 - Not to re-organise the transaction files

1 - To re-organise the transaction files for more efficient usage

## Functions

### Refresh (F5)

Use this after selecting **One-off Archive (F10)**. This re-sets the window options to the last saved settings for the archives. Machine Manager uses the saved settings.

### One-off Archive (F10)

Use this to run the archive right away, according to the window set-up. Do not select **Update (F8)**; this saves the changes. After the archive is complete, you can use **Refresh (F5)** to re-set the window to the settings last saved with **Update (F8)**.

Select **Update (F8)** to save the changes. Machine Manager now uses these settings.

# Performance Extract

Use this option to extract WM information for analysis purposes. You can only select completed transactions. You can extract them from the live file, the history file or any archive file containing transactions.

Extract data is copied to file WFP63. We recommend that you use the Active Business Intelligence options for performance analysis.

You can also run the performance extract using the command line. The format is:

EWMPERF [ENV] [MODE] [EXCLUDE]

Where:

[ENV] is the environment

[MODE] is one of:

- *ADD - To add all records to the file, even if they already exist
- *UPDATE - To add new records and update existing records
- *REPLACE - To clear the file and then add all new data

[EXCLUDE] is either:

- 0 - To include previously extracted records
- 1 - To exclude previously extracted records

For example:

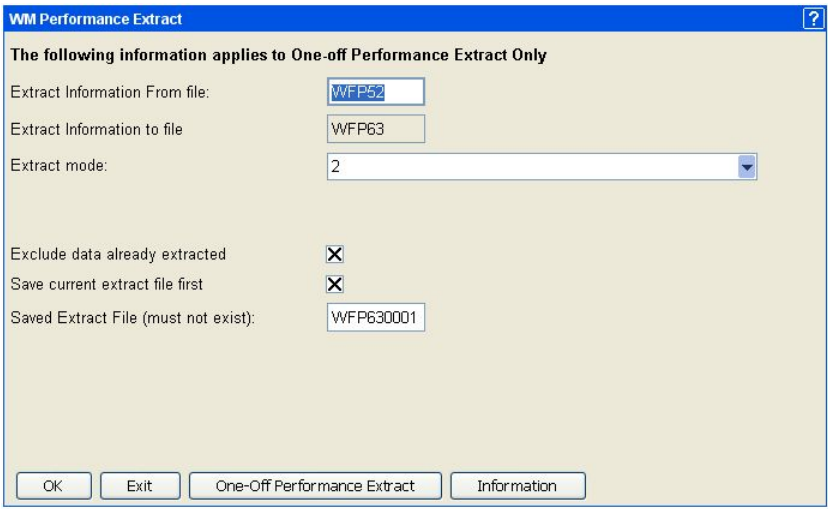
EWMPERF TST *ADD 0

## WM Performance Extract Window

To display this window, select **Performance Extract** from the WM Transaction Management menu and enter the environment on the Environment Select pop-up.

You can extract from one of your WM files: the live file, the history file or the archive file. You extract the data to the Performance Analysis Extract file (WFP63). You can save it to your own named file for use with the Active Business Intelligence options, or for other manual access.

You can use one of three extract modes. You can add to the existing performance file, update and add, or clear and replace the data.




## Fields

### Extract Information from File

Enter the file from which you want to extract information. This defaults to WFP52, the live file for Transaction Detail. You can also extract from the history file (WFP52H) or one of your archive files (WFP52Annnn).

### Extract Information to File

This is always WFP63.

### Extract Mode

Select the required extract mode:

1 - To add the extract run to existing data on the WFP63 file, even if the transaction detail exists

2 - To add the extract run to existing data on the WFP63 file, but where the transaction detail already exists, to overwrite and update with the new data

3 - To clear the WFP63 file before the extract is run and then add all the data

### Exclude Data Already Extracted

The software marks data when it has been included in a performance extract.

Use this checkbox as follows:

Unchecked - To include data previously extracted in this extract run

Checked - To exclude any transaction information previously extracted from the selected file

### Save Current Extract File First

Use this checkbox as follows:

Unchecked - Not to save the current extract file before extracting to a new one

Checked - To save the current extract file before extracting to a new one

### Saved Extract File (Must Not Exist)

Enter a new file name for the extracted data. This file must not already exist.

## Functions

### One-off Performance Extract (F10)

Use this to run an extract right away, according to the window set-up. The One-off Performance Extract Pop-up is displayed.

### Information (F13)

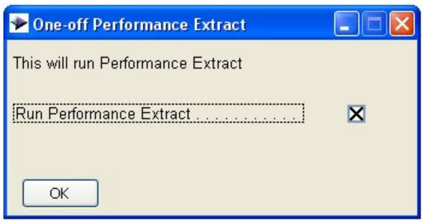
Use this to display a pop-up which shows the background information on the performance extract.

Select **Exit (F3)** to leave the option.

# One-off Performance Extract Pop-up

To display this pop-up, select **One-off Performance Extract (F10)** on the WM Performance Extract window.

Use this pop-up to confirm that you want to run a one-off extract.




## Fields

### Run Performance Extract

Use this checkbox as follows:

Unchecked - To return to the previous window without running the extract

Checked - To extract the information and save it to the entered file

Select **OK** to perform the extract. The software displays messages to show the progress of the extract.

# Remove Locks

Select **Remove Locks** from the WM Transaction Management menu.

Record locks are created when any WM subsystem job fails or ends abnormally. Use this option to remove any locked records set by the WM Engine, the Scheduler or the Escalation and Delegation procedures.

When you select this option, a batch job clears the WFP99 system locks file. When this is complete, you can re-start the jobs.

This is a batch job that runs in the background and displays no messages.

On the Specify WM Environment pop-up, enter the environment and then select **OK**.

# Transaction Purge

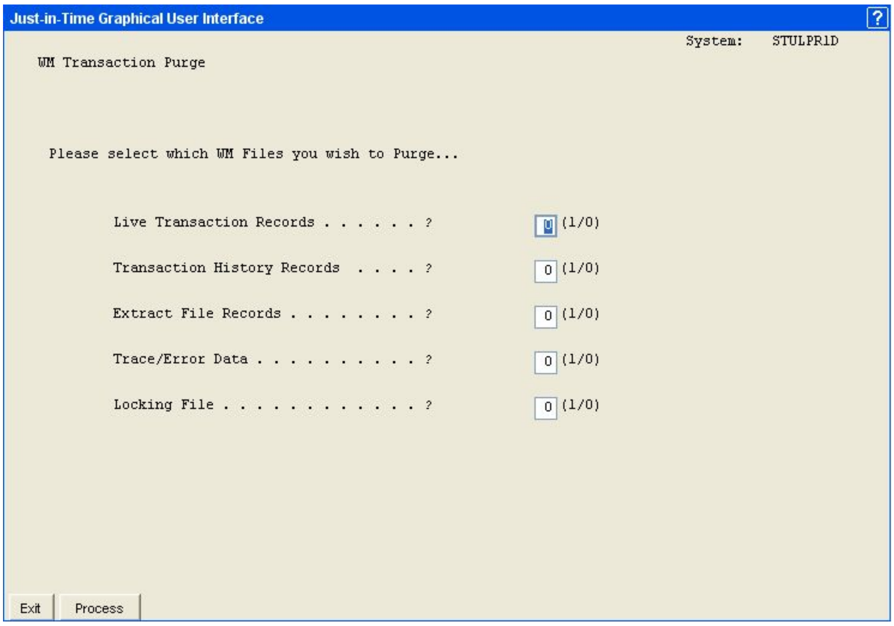
Use this option to clear out the transaction files. This clears WFP5*, WFP6, WFP95, WFP97 and WFP99 in the WM files library. (It runs a CLRPFM on the transaction files.)

Tip: This option does not create an archive; therefore you may want to run an archive before purging the transaction files.

## WM Transaction Purge Window

To display this window, select **Transaction Purge** from the WM Transaction Management menu. Enter the environment code in the Environment Select pop-up and then select **OK**.

Use this window to select the WM transaction file types you want to clear down. You can select from five different file types.




### Fields

#### Live Transaction Records

Enter one of the following:

0 - To retain the live transaction records

1 - To clear live transaction records held in files WFP50 through to WFP57

#### Transaction History Records

Enter one of the following:

0 - To retain the transaction history records

1 - To clear transaction history records from the transaction history files (WFP52H to WFP56H)

### Extract File Records

Enter one of the following:

0 - To retain the extract file records

1 - To clear transactions extracted to files WFP61-63

### Trace/Error Data

Enter one of the following:

0 - To retain the trace and error data extract file records in this run

1 - To delete trace details and error message data transactions from files WFP95 and WFP97

### Locking File

Enter one of the following:

0 - To retain the locked records

1 - To delete locked records from file WFP99

Select **F8=Process** to run the Transaction Purge.

# Archive from History

Use this option to archive data in the transaction management history files. The data is selected from the transaction details history file, WFP52H, and the transaction completion detail history file, WFP53H.

## WM Transaction Archive Pop-up

To display this pop-up, select **Archive From History** from the WM Transaction Management menu. Enter the environment on the Select WM Environment pop-up and then select **OK**.

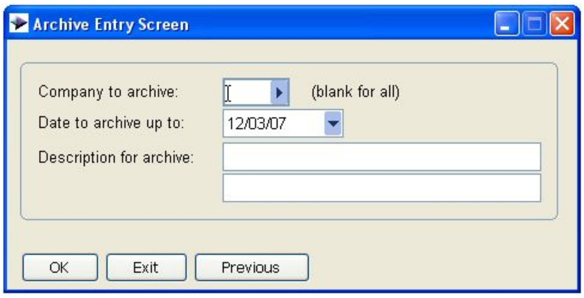
Use this pop-up to confirm that you want to proceed with the archive.


Select **OK** to proceed with the archive. The Archive Entry Screen pop-up is displayed.

# Archive Entry Screen Pop-up

To display this pop-up, select **OK** on the WM Transaction Archive pop-up.

Use this pop-up to select a company for the archive and the last transaction date for transactions to be included in the archive.




## Fields

### Company to Archive

Enter a company to limit the archive to transaction data from one of your companies.

Leave this field blank to include all companies.

Alternatively, use the prompt facility to select from the Select Company pop-up.

### Date to Archive Up To

Enter or select an archive date. Transactions up to and including the date entered will be selected.

### Description for Archive

Enter your description for the archive.

Select **OK** and then select **Submit (F8)** to process the archive.

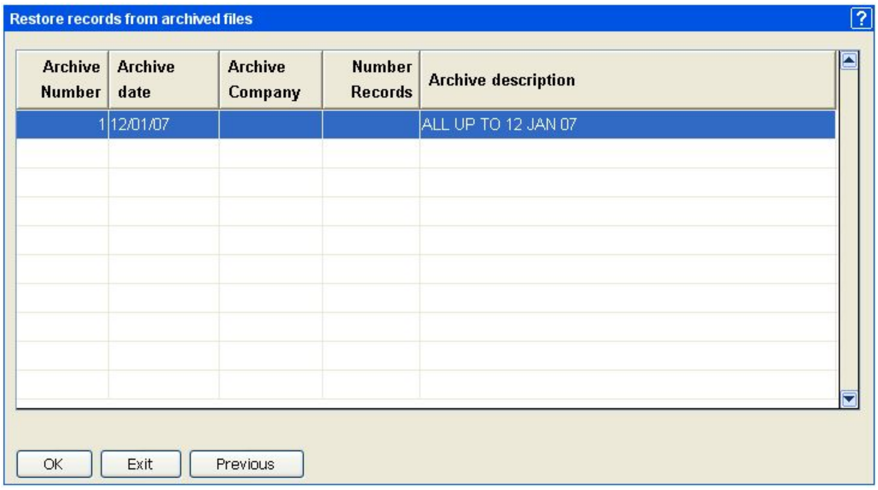
# Restore to History

Use this option to restore one or more of the archives created using the Archive from History menu option. For example, you may need to restore transactions to the history file to run a performance extract.

## Restore Records from Archived Files Window

To display this window, select **Restore to History** from the WM Transaction Management menu. Enter the environment to use on the Select WM Environment pop-up and then select **OK**.

Use this window to select the archive run to restore to the transaction details history file, WFP52H and the transaction completion detail history file, WFP53H.




### Options

#### Select

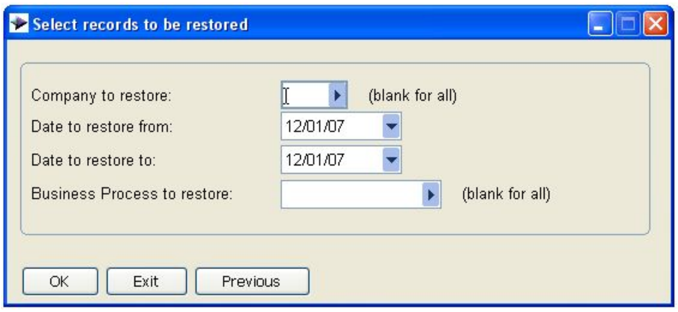
Use this to select an archive run to restore the transaction details to the history files.

Select an archive and then select **Submit (F8)** to display the Select Records to be Restored pop-up.

# Select Records to be Restored Pop-up

To display this pop-up, select an archive run and then select **Submit (F8)** on the Restore Records from Archived Files window.

Use this pop-up to restore records for one company, all companies for a range of transaction dates. You can also restore a related business process or all related business processes.




## Fields

### Company to Restore

Enter a company to restore transaction data from one of your companies.

Leave this field blank to restore data from all companies.

Alternatively, use the prompt facility to select from the Select Company pop-up.

### Date to Restore From

Enter or select the first transaction date to restore.

### Date to Restore To

Enter or select the last transaction date to restore.

### Business Process to Restore

Enter the Business Process to restore with the data, or leave this field blank to include all related Business Processes.

Alternatively, use the prompt facility to select from the Select Business Process pop-up.

Select **OK** and then select **Submit (F8)** to submit the job to restore the data and leave the option.

# Process Mapper

This option will transfer any outstanding activities to the new business process, provided that they exist in the new process.

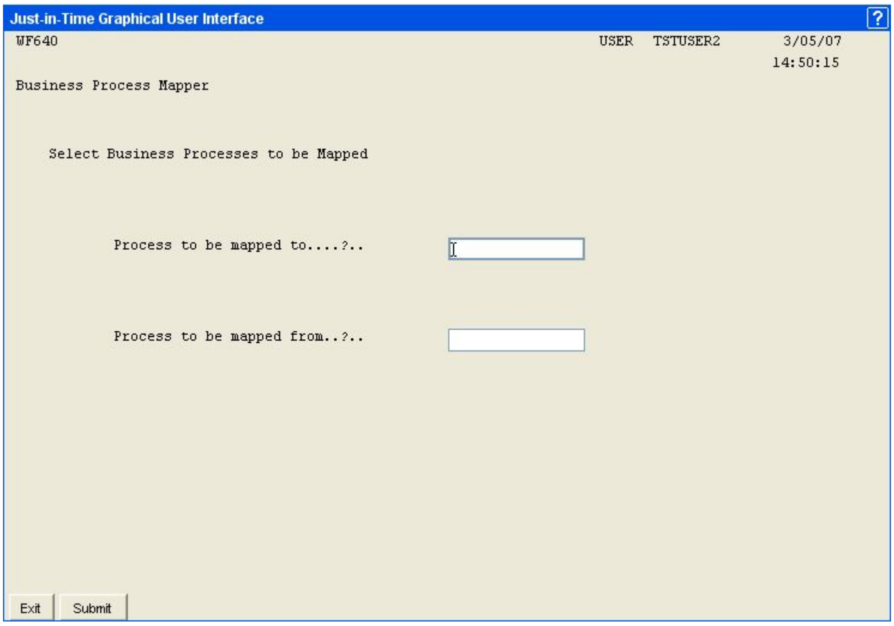
Any activities that cannot be uplifted are listed on the exceptions report.

Note: It is recommended that before activating a new version of a business process you should attempt to get as many outstanding activities as possible to a status of Pending. The Process Mapper should then be performed.

## Business Process Mapper Window

To display this window, select **Process Mapper** from the WM Transaction Management menu. Enter the environment to use on the Select WM Environment pop-up and then select **OK**.

Use this window to specify the business process that is to be updated.




### Fields

**Process to be Mapped To**

Enter the process that is to be used now. It must be an active process.

**Process to be Mapped From**

Enter the process that is currently used. It must be a previous version of the process being mapped to.

### Functions

**F4=Prompt**

Use this to prompt on the available business processes. You must enter **?** in the relevant field and then select **F4**. Depending on the field in which you entered the **?**, you will see either the Select Business Process to Map To pop-up or the Select Business Process to Map From pop-up.

Select **OK** and then select **F8=Submit** to submit the job to update the business process.

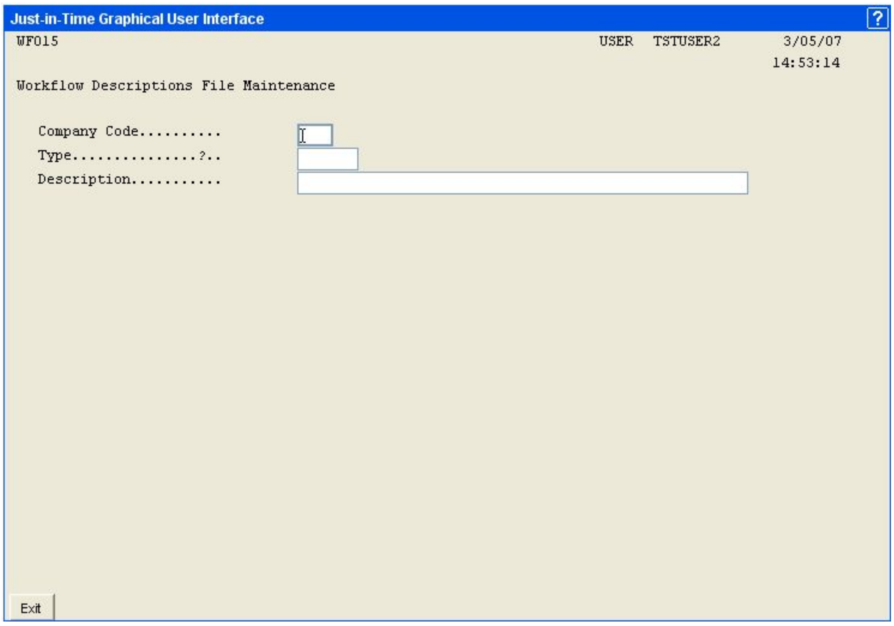
# Description File Maintenance

Use this option to define parameters for use in processes. The code details are relatively soft-coded and can be retrieved as data fields within the processes.

For example, descriptions might be used to store company data such as e-mail addresses or user names for retrieval in the business processes.

## Workflow Descriptions File Maintenance Window

To display this window, select **Descriptions File Maintenance** from the WM Transaction Management menu. Enter the environment to use on the Select WM Environment pop-up and then select **OK**.




### Fields

#### Company Code

Enter the company code to which this data relates.

#### Type

Enter the description type list that is to be maintained.

#### Description

Enter the type description.

### Functions

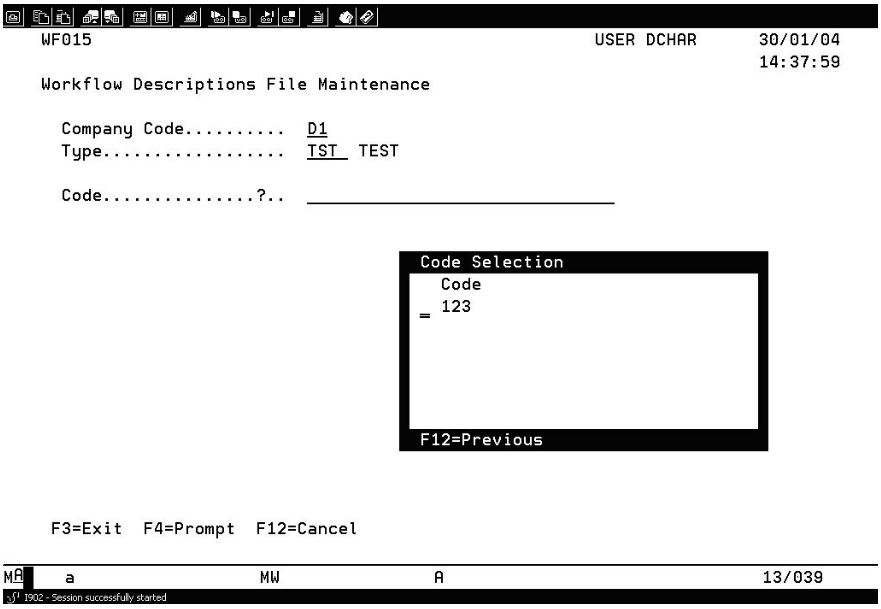
#### F4=Prompt

Use this to prompt on the available description types.

Select **OK** to display the Code Selection pop-up.

# Code Selection Pop-up

To display this pop-up, select **OK** on the Workflow Description File Maintenance window.




## Fields

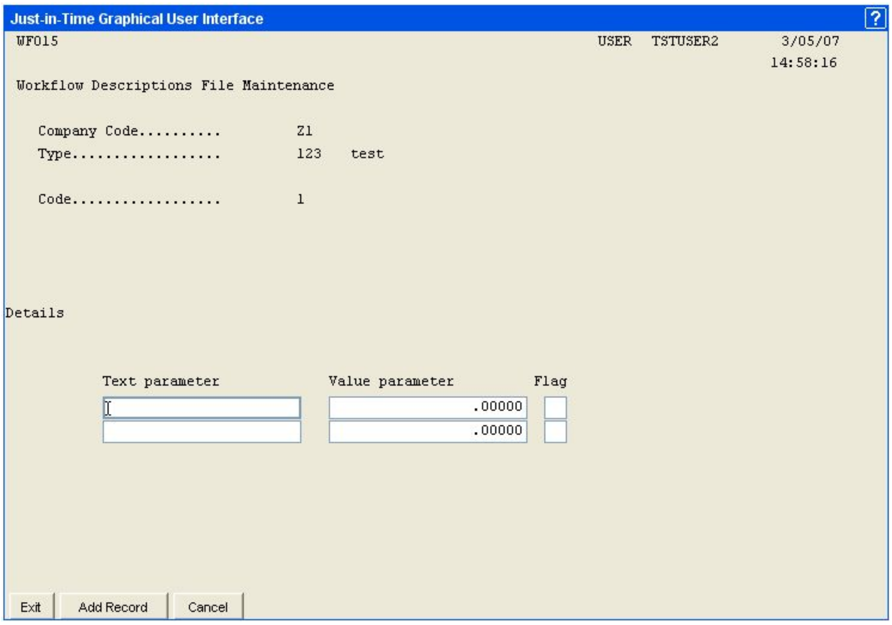
### Select (Untitled)

Use this field to select the code to be maintained.

Select **OK** to display the Code Details window.

# Code Details Window

To display this window, select **OK** on the Code Selection pop-up




## Fields

### Details

Enter descriptive details about this code.

### Text Parameter

Enter text values applicable for this code.

### Value Parameter

Enter numeric values applicable for this code.

### Flag

Enter flag settings applicable for this code.

## Functions

### F11=Delete

Use this to delete the code.

Select **OK** and then select **F8=Update** to update the code definition.

# Chapter 12 - Work Management Enabled Activities

# Introduction

## What is Work Management Enablement?

This chapter is concerned with application task activities that are enabled for Work Management, which are the menu options and tasks that are able to be placed into an Execution Model in process.connect.

You can build a number of different models in process.connect and they may be drawn to show application task activities, but the Work Management features and Enablement details for the activities only become relevant when defining a process that is to be activated and executed. These processes are sometimes described as Active Processes.

The activities have specific programming to communicate with the Work Management Engine. This programming contains two primary features:

- It accepts inputs from Work Management to drive a specific action in the activity.
- It takes outputs from the activity to drive the automation of a following event in an active process.

Not all application task activities have this Work Management enablement. It exists in only selected number of activities, those that have up to now been identified as key to an automated process. As new application task activities and processes are developed, further activities will be added to this set.

## Pre-requisite Reading

This chapter does not explain the features, concepts and attributes of Work Management and process.connect, all of which are covered in the **process.connect user guide**. In that guide, refer to Section 4, Using @ctive Modeler, and within that the sections:

- Software Model
- Execution Model Concepts

In particular, you should refer to the following attributes:

- Elemental Activities
- Document Types
- Execution Modes

## Enabled Activities

This chapter covers the use and values of each of these attributes for each of the enabled activities. This is to allow you to build these activities into your own active processes, knowing the scope of each, together with the attribute data needed to configure the process.connect models.

In an executable process, these enabled activities are indicated by the Elemental Activities icon.

The attribute names and terms used in this chapter are the same as those you see in @ctive Modeler.

### Example Processes

For each of the activities listed there is a section labelled "Where Used Example". This refers you to an existing Infor active process, where you can find an example of this activity in use and discover how the elemental activity is configured and how it may be preceded and followed by other elements.

The following examples relate to System21. Other application tasks in XA and LX are also enabled.

# Advanced Receiving

## Receipts Diary (1/AG)

### Scope

This informs Work Management when goods have been received for an ASN via the Receipts Diary.

The first node identifies the ASN received, the business object reference being the ASN number followed by the supplier code. The completion code of 02 applies if a new serious exception is created or if existing ones are still outstanding.

The second node identifies each purchase order received, the business object reference being the purchase order number.

The third node identifies the GRN received, the business object reference being the stockroom code '-' GRN number. An indication of the receipt location is given.

This would normally be an initial activity.

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAGRD | Receive Advanced Receiving Purchased Goods from Diary | |
| Execution Modes | User | 10 | Allowed | AG A2 0130 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | ASN | ASN | |
| | BOD Ref | (20 characters) | An ASN Number | |
| Output | Document Type | ASN | ASN | |
| | BOD Reference | (20 +8 characters) | ASN Number + Supplier Code | |
| | Exit Node | 01 | ASN Received | (None) |
| | | 02 | ASN Received with High Priority Exceptions | (None) |
| Output | Document Type | PURCH-ORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A Purchase Order Number | |
| | Exit Node | 01 | Order Received | (None) |

| | | | | |
|---|---|---|---|---|
| Output | Document Type | GRN | Goods Receipt Note | |
| | BOD Reference | (10 characters) | Stockroom (2), '-' (1) and GRN Number (7) | |
| | Exit Node | 01 | Receipt to Goods Inward | (None) |
| | | 02 | Receipt to Inspection | (None) |
| | | 03 | Receipt to Stores | (None) |

# Single Key Receiving (2/AG)

**Scope**

This informs Work Management when goods have been received for an ASN via Single Key Receiving (SKR).

The first node identifies the ASN received, the business object reference being the ASN number followed by the supplier code. The completion code of 02 applies if a new serious exception is created or if existing ones are still outstanding.

The second node identifies each purchase order received, the business object reference being the purchase order number.

The third node identifies the GRN received, the business object reference being the stockroom code '-' GRN number. An indication of the receipt location is given.

This would normally be an initial activity, but the SKR initial window can accept the ASN number and supplier code as input from Work Management.

**Constraints**

This does not apply for a receipt when the PO number is entered rather than an ASN number.

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADPG | Receive Advanced Receiving Purchased Goods (from SKR) | |
| Execution Modes | User | 10 | Allowed | AG A2 0100 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | ASN | ASN | |
| | BOD Ref | (20 characters) | An ASN Number | |

| | | | | |
|---|---|---|---|---|
| Output | Document Type | ASN | ASN | |
| | BOD Reference | (20 +8 characters) | ASN Number + Supplier Code | |
| | Exit Node | 01 | ASN Received | (None) |
| | | 02 | ASN Received with High Priority Exceptions | (None) |
| Output | Document Type | PURCH-ORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A Purchase Order Number | |
| | Exit Node | 01 | Order Received | (None) |
| Output | Document Type | GRN | Goods Receipt Note | |
| | BOD Reference | (10 characters) | Stockroom (2), '-' (1) and GRN Number (7) | |
| | Exit Node | 01 | Receipt to Goods Inward | (None) |
| | | 02 | Receipt to Inspection | (None) |
| | | 03 | Receipt to Stores | (None) |

# Receipt Exception Handling (3/AG)

## Scope

This informs Work Management when a serious exception for a goods receipt has been actioned.

The first node identifies the ASN actioned, the business object reference being the ASN number followed by the supplier code.

The second node identifies each purchase order received, the business object reference being the purchase order number.

The third node identifies the GRN involved, the business object reference being the stockroom code '-' GRN number. An indication of the receipt location is given.

This would normally be an initial activity.

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAGREH | Advanced Receiving Exception Handled | |
| Execution Modes | User | 10 | Allowed | AG A2 0150 |
| | Automatic | 20 - 40 | Not Applicable | |

| | | | | |
|---|---|---|---|---|
| Input | Document Type | ASN | ASN | |
| | BOD Ref | (20 characters) | An ASN Number | |
| Output | Document Type | ASN | ASN | |
| | BOD Reference | (20 +8 characters) | ASN Number + Supplier Code | |
| | Exit Node | 01 | ASN Actioned | (None) |
| | | 02 | ASN Actioned with High Priority Exceptions Outstanding | (None) |
| Output | Document Type | PURCH-ORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A Purchase Order Number | |
| | Exit Node | 01 | Order Received | (None) |
| Output | Document Type | GRN | Goods Receipt Note | |
| | BOD Reference | (10 characters) | Stockroom (2), '-' (1) and GRN Number (7) | |
| | Exit Node | 01 | Receipt to Goods Inward | (None) |
| | | 02 | Receipt to Inspection | (None) |
| | | 03 | Receipt to Stores | (None) |

# Accounts Receivable

## Name and Address Maintenance (1/ARM)

### Scope

This informs Work Management when a new customer has been created, or a customer has been amended.

The completion notification includes a reason code to identify whether the customer's Account Stop or Account Status has been set (to something other than blank), indicating that the customer is on stop, or whether the Account Stop and Account Status have been cleared indicating that the customer is now off stop.

### Constraints

The reason code that identifies the account as on stop only applies to the single customer being amended; it is not attempting to report the status of the customer in a hierarchy. If the customer is in a hierarchy and you need to know the overall account status, you will need to interrogate the hierarchy separately. For an example, see OE Hierarchy Check.

Accounts Receivable customers can be added from an external interface using a call to SLI15, taking details from the Customer Interface table SLPI5. This interface activity is not Work Management enabled, so there will be no notification if customers are added via this route.

#### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADSLCS | SL Customer Added | |
| Execution Modes | User | 10 | Allowed | SL A2 2010 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | (Blank) | Customer added | 01 On stop |
| | | | | 02 Suspended |
| | | | | 03 Flagged for deletion |
| | | | | 04 Unknown status |
| | | | | 05 Litigation |
| | | | | Otherwise, account active |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMSLCS | SL Customer Amended | |
| Execution Modes | User | 10 | Allowed | SL A2 2010 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | (Blank) | Customer amended | 01 Now on stop |
| | | | | 02 Now off stop |
| | | | | Otherwise, amended without any specific condition |

### Where Used Example

Release from Credit Stop: RCS1 New Account

Release from Credit Stop: RCS2 Amended Account

## Delivery Address Maintenance (2/ARM)

### Scope

This informs Work Management when a new delivery address has been created or a delivery address has been amended.

The completion notification includes a reason code to identify whether the delivery point's Account Status has been set (to something other than blank), indicating that the delivery point is on stop, or whether the account status has been cleared, indicating that the delivery point is now off stop.

Delivery addresses can also be added and amended in Sales Order Processing Customer Maintenance. These additions and changes are identified with different activity codes. For further information, see the OE Customer Maintenance section.

### Constraints

Accounts Receivable customers can be added from an external interface using a call to SLI15, taking details from the Customer Interface table SLPI5. This interface activity is not Work Management enabled, so there will be no notification if customers are added via this route.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Activity Code | | GESGADSLDA | Delivery Address Added | |
| Execution Modes | User | 10 | Allowed | SL A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Delivery address added | 01 On stop |
| | | | | 02 Suspended |
| | | | | 03 Flagged for deletion |
| | | | | 04 Unknown status |
| | | | | 05 Litigation |
| | | | | Otherwise, account active |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMSLDA | Delivery Address Amended | |
| Execution Modes | User | 10 | Allowed | SL A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Customer amended | 01 Now on stop |
| | | | | 02 Now off stop |
| | | | | Otherwise, amended without any specific condition |

### Where Used Example

Release from Credit Stop: RCS1 New Account

Release from Credit Stop: RCS3 Amended Delivery Point

# SL Background Update (20/L1S)

### Scope

This informs Work Management when cash has been received or cash has been cancelled for a customer in the Account Balance Update task.

The alternative exit nodes identify these two events: received and cancelled cash.

The output document is a customer, allowing a follow up action in a process for a customer after a cash posting has occurred.

### Constraints

There may be a need to identify other changes to the customer's account balance, but the events recognised in this activity do not go that far; they are only concerned with cash postings. Identification of other events would have to be tackled separately.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGUPCUBL | Update Customer Balances | |
| Execution Modes | User | 10 | Allowed | SL A2 0040 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | UC | Cash received | (None) |
| | | UX | Cancelled cash | (None) |

### Where Used Example

Credit Diary: CD2 Balance Update

# Print Statement (3/ARC)

### Scope

When a customer code is passed to the Statement Print task by Work Management, it will print a statement for that single customer.

- When the execution mode is User Invoked, the customer code is automatically completed on the selection window. The user can then select the option to submit the print.
- When this is executed in any of the Automatic modes, the statement is printed automatically for the customer. It can also be run in a Multiple Document Processing mode.

It will return an exit node to indicate that a statement has been printed.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRCUST | Print Customer Statement | |
| Execution Modes | User | 10 | Allowed | SL A2 3040 |
| | Automatic | 20 - 40 | Allowed | SL A2 3045 |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | 01 | Printed | (None) |

### Where Used Example

Credit Diary: CD3.1 Scheduled Call

Credit Diary: CD3.2 Pre-Emptive Call

Credit Diary: CD3.3 Follow-up Call

Credit Diary: CD3.4 Incoming Call

Credit Diary: CD3.5 Reactive Call: Suspended Order

Credit Diary: CD3.6 Reactive Call: Cancelled Cash

## Credit Diary Generation (42/ARP)

### Scope

This informs Work Management when the Credit Diary Generation task has been run and new call lists have been prepared.

The first output identifies that there were already outstanding calls in the company, calls that have been cancelled in preparation for a newly generated list. This output node could be used to cancel outstanding Work Management transactions, in preparation for new transactions to be added for the new call list.

The second output identifies every customer for whom a Scheduled or Pre-emptive call has been generated. The output node identifies which type of call is required.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRCLOS | Print Calls Outstanding | |
| Execution Modes | User | 10 | Allowed | SL A2 2330 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | COMPANY | Company | |
| | BOD Reference | (2 characters) | Company Code | |
| | Exit Node | 01 | Calls Reported | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGGNCUCC | Generate Customer Call List | |
| Execution Modes | User | 10 | Allowed | SL A2 2330 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | 01 | Scheduled call | |
| | | 02 | Pre-emptive call | |

## Where Used Example

Credit Diary: CD1 Call list Generation (Outstanding Call Report and Call Generation)

# Incoming Call (Call Hub) (43/ARP)

### Scope

This option is only really relevant when the Credit Diary process is active.

- When Credit Diary is not active, this activity operates just like a Credit Manager Enquiry.
- When Work Management is active, this activity has additional options that trigger a number of different output events.

An Incoming Call is one of a set of six activities that use this call hub, each identified by a different activity code. Only the Incoming Call can be called from a menu option; the others are launched from a Workspace Action List when a business process determines that they need to be run.

The following is the list of six activities processed by this call hub; the alternative activity codes are listed in the table that follows.

- Incoming Call
- Scheduled Call
- Pre-emptive Call
- Follow-up Call
- Reactive Call - Cancelled Cash
- Reactive Call - Suspended Order

The output nodes are much the same for each activity:

- Where Complete Call (F8) is selected to record a new call, the output document is a Customer, with an exit node of Call Taken.
- Where Call Action (F23) is selected to record a follow up call, the output document is a Customer, with an exit node of Follow Up Call Requested.
- Where Call Action (F23) is selected to request a statement re-print, the output document is a Customer, with an exit node of Re-print Statement.
- Where Re-print (F8) is selected on the Item Enquiry window, the output document is either an Invoice or a Credit Note depending on the type of item selected.

The one activity that is different is the Reactive Call Suspended Order, which has the ability to release a sales order.

- Where the release option is taken, the output document is a Sales Order.
- The primary input and output document type is Sales Order rather than Customer.

## Constraints

Because specific events have been identified with Credit Diary in mind, the functions in this activity are quite specific and are therefore likely to drive processes in this specific way. The Credit Diary process is not mandatory, but it is likely that any process you build would follow the Credit Diary model.

This activity is therefore unlike other activities where the events are more general and can be used to drive any kind of subsequent process.

**Work Management Parameters**

### Incoming Call

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENCUC6 | Enter Customer Call Incoming | |
| Execution Modes | User | 10 | Allowed | SL A2 1471 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | 01 | Call taken | (None) |
| | | RS | Re-print statement | (None) |
| | | CC | Follow-up call requested | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | Sales invoice number | |
| | Exit Node | RI | Duplicate invoice requested | (None) |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | RC | Duplicate credit note requested | (None) |

## Where Used Example

Credit Diary: CD3.4 Incoming Call

### Scheduled Call

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENCUC1 | Enter Customer Call Scheduled | |

All other parameters as above

**Where Used Example**

Credit Diary: CD3.1 Scheduled Call

### Pre-emptive Call

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENCUC5 | Enter Customer Call Pre-emptive | |

All other parameters as above

**Where Used Example**

Credit Diary: CD3.2 Pre-Emptive Call

### Follow-up Call

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENCUC2 | Enter Customer Call Follow-up | |

All other parameters as above

**Where Used Example**

Credit Diary: CD3.3 Follow-up Call

## Reactive Call - Cancelled Cash

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENCUC4 | Enter Customer Call Reactive Cancelled Cash | |

All other parameters as above

**Where Used Example**

Credit Diary: CD3.6 Reactive Call: Cancelled Cash

## Reactive Call - Suspended Order

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Activity Code | | JBAGENORC3 | Enter Customer Call Reactive Suspend | |
| Execution Modes | User | 10 | Allowed | SL A2 1471 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Call taken | (None) |
| | | RO | Release order | (None) |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | RS | Re-print statement | (None) |
| | | CC | Follow-up call requested | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | Sales invoice number | |
| | Exit Node | RI | Duplicate invoice requested | (None) |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | RC | Duplicate credit note requested | (None) |

## Where Used Example

Credit Diary: CD3.5 Reactive Call: Suspended Order

# Advanced Customer Scheduling

## EDI/Validation Sleeper (20/L1S)

**Scope**

This informs Work Management when a new customer schedule message has been processed in the Advanced Customer Scheduling Validation Sleeper.

If the validation identifies a severe error that prevents a schedule being created, the output is a Schedule Message document type, where the business object reference identifies the customer and mailbox entry on the interface file. This output node could be used to direct a user to correct the data on the interface files.

Alternatively, if the validation identifies no errors or only minor errors, a schedule is created and the output is a New Schedule document type, where the business object reference identifies the contract and revision reference. The two output nodes distinguish between a valid schedule and one that has errors.

- The Error completion could be used to inform a user that this schedule has outstanding errors.
- The Valid Schedule completion identifies a new schedule that has started its validation, comparison and update cycle.

**Constraints**

The exit nodes do not identify the individual errors, as these are already recorded on the schedule error files. The user can be directed to review the exception details on the schedule.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGVLSHMS | Validate Schedule Message | |
| Execution Modes | User | 10 | Allowed | AC A2 0040 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SCHEDULEM | Schedule Message | |
| | BOD Reference | (28 characters) | Company, Customer, Delivery Seq, Mailbox ID, Document Seq No. | |
| | Exit Node | 01 | Errors logged | (None) |
| Section | Parameter | Codes | Description | Tasks/Reasons |
| Activity Code | | JBAGVLSCH | Validate schedule | |
| Execution Modes | User | 10 | Allowed | AC A2 0040 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SCHEDULENW | New Schedule | |
| | BOD Reference | (17 characters) | Contract, Reference No, Revision No, Schedule Type | |
| | Exit Node | (Blank) | Valid schedule | (None) |
| | | 01 | Errors logged | (None) |

### Where Used Example

Schedule Reconciliation (Automotive): SR1.1 EDI Message Validation

Schedule Reconciliation (Automotive): SR1.2 Schedule Validation

## Comparison Sleeper (20/L1S)

### Scope

This informs Work Management when a customer schedule has been processed in the Advanced Customer Scheduling Comparison Sleeper.

The two output nodes distinguish between a valid schedule and one that has errors.

The error completion could be used to inform a user that this schedule has outstanding errors.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCPSCH | Compare Schedule | |
| Execution Modes | User | 10 | Allowed | AC A2 0042 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SCHEDULENW | New Schedule | |
| | BOD Reference | (17 characters) | Contract, Reference No, Revision No, Schedule Type | |
| | Exit Node | (Blank) | Valid schedule | (None) |
| | | 01 | Errors logged | (None) |

### Where Used Example

Schedule Reconciliation (Automotive): SR2 Schedule Comparison

## Schedule Update Sleeper (20/L1S)

### Scope

This informs Work Management when a customer schedule has been processed in the Advanced Customer Scheduling Update Sleeper.

One output identifies the status of the schedule. This is the New Schedule document type that has two output nodes to distinguish between a valid schedule and one that has errors.

- The Error completion could be used to inform a user that this schedule has outstanding errors.
- The Schedule Processed node completes the cycle for the New Schedule document, having completed its validation, comparison and update validation stages.

If there are no errors, there is an additional output with a document type of Active Schedule to identify a schedule that is now available for processing.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGSCHUPD | Schedule Update | |
| Execution Modes | User | 10 | Allowed | AC A2 0044 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SCHEDULENW | New Schedule | |
| | BOD Reference | (17 characters) | Contract, Reference No, Revision No, Schedule Type | |
| | Exit Node | (Blank) | New schedule processed | (None) |
| | | 01 | Errors | (None) |
| Output | Document Type | SCHEDULEAC | Active Schedule | |
| | BOD Reference | (17 characters) | Contract, Reference No, Revision No, Schedule Type | |
| | Exit Node | (Blank) | Active schedule created | (None) |

### Where Used Example

Schedule Reconciliation (Automotive): SR3 Schedule Acceptance

# Advanced Order Entry

## Advanced Order Entry (1/AOP)

### Scope

This informs Work Management when a new sales order has been created in Advanced Order Entry, the new sales order number becoming the business object document reference. It is distinguished from other forms of order entry by the activity code.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required, you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENSOAD | Enter Sales Order Advanced | |
| Execution Modes | User | 10 | Allowed | AO A2 1010 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Sales order created | (None) |

### Where Used Example

Order Fulfilment: OF1.1 Order Placement

## Advanced Order Amend (2/AOP)

### Scope

This informs Work Management when a sales order has been amended in Advanced Order Amend; the sales order number is the business object document reference. It is distinguished from other forms of order amendment by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMSOAD | Amend Sales Order Advanced | |
| Execution Modes | User | 10 | Allowed | AO A2 1020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Sales order amended | (None) |

### Where Used Example

Order Fulfilment: OF1.2 Order Amendment

## Quotation Print/Re-print (2/AOR)

### Scope

When a quotation order number is passed to the Quotation Print by Work Management, it will print a quotation for that one order.

- When the execution mode is User Invoked, the quotation order number is automatically completed on the selection window. The user can then select the option to submit the print.
- When executed in any of the Automatic modes, the quotation is printed automatically. It can also be run in a Multiple Document Processing mode.

There are two activity codes recognised by this task, one for an original print and a separate code for a re-print. This allows the print and re-print functions to be defined as separate elements in a business process.

It will return exit nodes to indicate either a successful or a failed print request, with reason codes to give greater detail as to the reason for failure. These reason codes could be used to output messages to an appropriate user.

### Constraints

The input is a quotation order number; it does not accept a specific quotation type.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Activity Code | | JBAGPRQT | Print Quotation | |
| Execution Modes | User | 10 | Allowed | AO A2 3020 |
| | Automatic | 20 - 40 | Allowed | AO A2 4040 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Quotation order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Quotation order number | |
| | Exit Node | (Blank) | Quotation printed | (None) |
| | | 01 | Failed to print quotation | 01 Document is not a quotation |
| | | | | 02 Quotation already printed |
| | | | | 03 Quote type invalid for type selected |

## Where Used Example

Order Fulfilment: OF1.1.1 Quotation Print

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRPQT | Re-print Quotation | |
| Execution Modes | User | 10 | Allowed | AO A2 3020 |
| | Automatic | 20 - 40 | Allowed | AO A2 4050 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Quotation order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Quotation order number | |
| | Exit Node | (Blank) | Quotation printed | (None) |
| | | 01 | Failed to print quotation | 01 Failed to print quotation |
| | | | | 02 Document is not a quotation |
| | | | | 03 Quote type invalid for type selected |

## Where Used Example

Order Fulfilment: OF1.2.1 Quotation Re-print

# Customer Returns

## Returns Entry (1/CRP)

### Scope

This informs Work Management when a new return note has been created in Customer Returns Entry, the new return note number becoming the business object document reference.

### Constraints

When Returns Entry and Amend is under Work Management control, the Print Immediately option is not available. It is assumed that the Returns Management process will control the printing of the return.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENRN | Enter Return Note | |
| Execution Modes | User | 10 | Allowed | CR A2 1210 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A new return note | |
| | Exit Node | 01 | Return note entered | (None) |

### Where Used Example

Returns Management: RM1 Returns Authorisation

## Returns Amendment (2/CRP)

### Scope

This informs Work Management when a new return note has been amended in Customer Returns Amendment; the return note number is the business object document reference.

The exit nodes indicate whether the return was successfully amended or cancelled.

It also accepts a return note number as an input. This allows the amendment activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the amendment is being forced to correct a detected problem.

### Constraints

When Returns Entry and Amend is under Work Management control, the Print Immediately option is not available. It is assumed that the Returns Management process will control the printing of the return.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMRN | Amend Return Note | |
| Execution Modes | User | 10 | Allowed | CR A2 1220 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note amended | (None) |
| | | 02 | Return note cancelled | (None) |

### Where Used Example

Returns Management: RM1 Returns Authorisation

## Returns Authorisation (3/CRP)

### Scope

When a return note number is passed to the Returns Authorisation activity by Work Management it will authorise that single return.

- When the execution mode is User Invoked, the return note number is automatically completed on the selection window. The user can then select OK to process that one return.
- When executed in any of the Automatic modes, the order is authorised automatically. It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed authorisation request, with reason codes to give further detail as to the reason for error. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAURN | Authorise Return Note Interactive | |
| Execution Modes | User | 10 | Allowed | CR A2 1270 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note authorised | (None) |
| | | 02 | Return note authorisation error | 01 Return note already authorised |
| | | | | 02 Return note not found |

## Where Used Example

None

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAURNB | Authorise Return Note Batch | |
| Execution Modes | User | 10 | Not applicable | |
| | Automatic | 20 - 40 | Allowed | CR A2 1275 |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note authorised | (None) |
| | | 02 | Return note authorisation error | 01 Return note already authorised |
| | | | | 02 Return note not found |

## Where Used Example

Returns Management: RM1 Returns Authorisation

# Print Returns Notes (1/CRR)

## Scope

When a return note number is passed to the Print Returns Notes activity by Work Management it will print that single return.

It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed print request, with reason codes to give further detail as to the reason for error. These reason codes could be used to output messages to an appropriate user.

## Constraints

When this is run in User Invoked mode there is no effect on the selection parameters.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRRN | Print Return Note | |
| Execution Modes | User | 10 | Allowed | CR A2 3010 |
| | Automatic | 20 - 40 | Allowed | CR A2 3011 |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note printed | (None) |
| | | 02 | Return note not printed | 01 Incorrect status |
| | | | | 02 Already cancelled |
| | | | | 03 Return note not found |
| | | | | 04 No lines on return note |

## Where Used Example

Returns Management: RM1 Returns Authorisation

# Returns Receiving (4/CRP)

## Scope

This informs Work Management when goods have been received against a returns note in the Returns Receiving activity.

One output node for the Return Note indicates the return note that has been received, the business object document reference being the return note number.

A second set of output nodes identifies the new Goods Returned Number that has been raised and indicates, with one of three separate values, the receipt location.

This would be most likely to be an initial activity but it also accepts a return note as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the receipt is being driven by a receipt due notification.

## Constraints

When a return note number is passed to the Returns Receiving activity by Work Management it will not automatically complete the returns note number on the selection window, in the way in which other similar activities operate.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRCRG | Receive Returned Goods | |
| Execution Modes | User | 10 | Allowed | CR A2 1230 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note received | (None) |
| Output | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |
| | Exit Node | 01 | Return to goods inward | (None) |
| | | 02 | Return to inspection | (None) |

| | | | | |
|---|---|---|---|---|
| | | 03 | Return to stores | (None) |

### Where Used Example

Returns Management: RM2.1 Returns Receiving

## Returns Scrap/Adjust (5/CRP)

### Scope

This informs Work Management when returned goods have been scrapped or the balance has been adjusted against a Goods Returned Note number in the Returns Scrap and Adjustment activity.

One output node for the GRN indicates the goods receipt note number that has been adjusted, the business object document reference being the GRN number.

A second output node identifies the new Rejection Note Number that has been raised.

This would be most likely to be an initial activity but also accepts a GRN as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the adjustment is being driven by some external event. When a GRN number is passed to the Returns Scrap and Adjustment activity by Work Management it will automatically complete the GRN order number on the selection window.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRTRR | Return Returns Receipt | |
| Execution Modes | User | 10 | Allowed | CR A2 1240 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |
| Output | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |

| | | | | |
|---|---|---|---|---|
| | Exit Node | 01 | Goods returned note updated | (None) |
| Output | Document Type | RETREJECT | Returns Rejection Note | |
| | BOD Reference | (5 digits) | A returns rejection note number | |
| | Exit Node | 01 | Returns rejection note created | (None) |

### Where Used Example

Returns Management: RM2.3 Returns Scrap Adjust

## Returns Transfer (6/CRP)

### Scope

This informs Work Management when returned goods have been transferred between receipt locations against a goods returned note number in the Returns Transfer activity.

The output node for the GRN has one of three values to indicate into which location the goods have been transferred, the business object document reference being the goods retuned note number.

This would be most likely to be an initial activity but also accepts a GRN as an input. This allows the transfer activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the adjustment is being driven by some external event. When a GRN number is passed to the Transfer activity by Work Management it will automatically complete the GRN order number on the selection window.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGTRRR | Transfer Returns Receipt | |
| Execution Modes | User | 10 | Allowed | CR A2 1250 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |
| Output | Document Type | GRETN | Goods Returned Note | |

| | | | | |
|---|---|---|---|---|
| | BOD Reference | (7 digits) | Goods returned note number | |
| | Exit Node | 01 | Transfer to goods inward | (None) |
| | | 02 | Transfer to inspection | (None) |
| | | 03 | Transfer to stores | (None) |

### Where Used Example

Returns Management: RM2.2 Returns Transfers

## Print GRNs (2/CRR)

### Scope

When a GRN number is passed to the Customer Returns Print GRNs activity by Work Management it will print that single goods retuned note.

It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed release request, with reason codes to give further detail as to the reason for failure. The failure reason code includes identifying orders that should not be printed, but should be faxed or sent by EDI. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRRR | Print Returned Receipt Note | |
| Execution Modes | User | 10 | Allowed | CR A2 3020 |
| | Automatic | 20 - 40 | Allowed | CR A2 3020 |
| Input | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |
| Output | Document Type | GRETN | Goods Returned Note | |
| | BOD Reference | (7 digits) | Goods returned note number | |
| | Exit Node | 01 | Goods returned note printed | (None) |

| | | | | |
|---|---|---|---|---|
| | | 02 | Goods returned note not printed | 01 Goods returned note already printed |
| | | | | 02 Goods returned note not found |

**Where Used Example**

Returns Management: RM2.5 Goods Returned Note Printing

## Create Credit Note (7/CRP)

**Scope**

When a customer return note number is passed to the Customer Returns Create Credit Note activity by Work Management it will create a credit note for that single customer return.

It can also be run in a Multiple Document Processing mode.

One output node identifies that the return note has been successfully credited.

The second output node identifies that a new credit note has been created, the credit note number becoming the business object document reference.

Credit notes are subsequently printed using the Print Invoices and Credits activity in Sales Order Processing, which is an activity enabled for Work Management and therefore can recognise the credit note document just created.

**Constraints**

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCRCR | Create Credit | |
| Execution Modes | User | 10 | Allowed | CR A2 1260 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| Output | Document Type | RETURNNOTE | Return Note | |
| | BOD Reference | (7 characters) | A return note | |
| | Exit Node | 01 | Return note credited | (None) |

| | | | | |
|---|---|---|---|---|
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | 01 | Credit note created | (None) |

## Where Used Example

Returns Management: RM3 Returns Crediting

# Distribution Requirements Planning

## Distribution Order Entry (4/DRP)

### Scope

This informs Work Management when a new order has been created in Distribution Order Entry activity, the new order number becoming the business object document reference. It is distinguished from other forms of sales order entry by the activity code.

Note: Because Distribution orders are stored alongside other sales orders in the Sales Order Processing database, the business object document has the common type of 'Sales Order'.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENSODR | Enter Transfer Order DRP | |
| Execution Modes | User | 10 | Allowed | DR A2 5004 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new order number | |
| | Exit Node | (Blank) | DRP order created | (None) |
| | | 01 | Order suspended | (None) |

### Where Used Example

None

## Distribution Order Amend (5/DRP)

### Scope

This informs Work Management when a distribution order has been amended in the Distribution Order Amend activity, the order number being the business object document reference. It is distinguished from other forms of sales order amendment by the activity code.

Note: Because Distribution orders are stored alongside other sales orders in the Sales Order Processing database, the business object document has the common type of 'Sales Order'.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMSODR | Amend Transfer Order DRP | |
| Execution Modes | User | 10 | Allowed | DR A2 5005 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Order number | |
| | Exit Node | (Blank) | DRP order amended | (None) |
| | | 01 | Order suspended | (None) |

### Where Used Example

None

## Confirm Shipment Receipt (7/DRP)

### Scope

This informs Work Management when goods have been received against a DRP transfer order in the DRP Confirm Shipment Receipt activity.

One output node (Sales Order) indicates that a receipt of some kind has occurred against the DRP order, the business object document reference being the DRP order number.

A second output node (Transfer Order Receipt) identifies that the order line that has been receipted.

This would be most likely to be an initial activity, but also accepts a transfer order as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the receipt is being prepared based on notification of transfer shipment. When a transfer order number is passed to the Confirm Shipment Receipt activity by Work Management it will automatically complete the Distribution Order Number on the selection window.

Note: The Inventory, DRP and Production Transfer receipt activities are distinguished by different activity codes.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGRCTODR | Receive Transfer Order - DRP | |
| Execution Modes | User | 10 | Allowed | DR A2 5011 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | SALESORDER | DRP Order | |
| | BOD Reference | (7 characters) | DRP order number | |
| Output | Document Type | SALESORDER | DRP Order | |
| | BOD Reference | (7 characters) | DRP order number | |
| | Exit Node | (Blank) | Order received | (None) |
| Output | Document Type | TRANFRECPT | Transfer Receipt | |
| | BOD Reference | (10 characters) | DRP order number (7) plus line number (3) | |
| | Exit Node | (Blank) | Order line received | (None) |

## Where Used Example

None

Tip: The Goods Receiving: GR1 Purchase Goods Receiving process has a similar example for Purchase Order receipts.

# Enterprise

## Enterprise Miscellaneous Credits (25/EOP)

### Scope

This informs Work Management when a new credit note has been created in Enterprise Miscellaneous Credits activity, the new credit note number becoming the business object document reference. It is distinguished from other forms of credit note creation by the activity code.

Enterprise Miscellaneous Invoices also has a separate activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | ENTSALCRN | Enterprise Sales Credit Note | |
| Execution Modes | User | 10 | Allowed | EO A2 2001 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | (Blank) | Credit note created | (None) |
| | | 01 | Credit note not created | (None) |

### Where Used Example

Enterprise Orders: EO4.1 Miscellaneous Enterprise Credit Notes

## Enterprise Miscellaneous Invoices (26/EOP)

### Scope

This informs Work Management when a new invoice has been created in Enterprise Miscellaneous Invoices activity, the new invoice number becoming the business object document reference. It is distinguished from other forms of invoice creation by the activity code.

Enterprise Miscellaneous Credit Notes also has a separate activity code.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | ENTSALINV | Enterprise Sales Invoice | |
| Execution Modes | User | 10 | Allowed | EO A2 2002 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | (Blank) | Invoice created | (None) |
| | | 01 | Invoice cancelled | (None) |

## Where Used Example

Enterprise Orders: EO3.1 Miscellaneous Enterprise Invoice Creation

# Inventory Management

## Item Maintenance (2/INM)

### Scope

This informs Work Management when a new item has been created or an item has been amended in Item Maintenance. Separate activity codes identify an addition from an amendment.

Other forms of item maintenance have their own activity codes. See the sections on **Copy Based on Item Creation (11/INM**) and **GIM (Item Update) (11/INC)** for further details.

### Constraints

The single exit node only identifies that an item has been created or amended; it does not identify the state or type of the item, information that is often required. If that level of detail were to be needed, you would have to follow this activity in the process with an interrogation element of some kind to decide whether the event is relevant and what path to follow next.

There are a number of item-related activities that have
not
been enabled. These should be considered when building a new solution in case any of these details are relevant. They are:

- Word Trade item details
- DRP item details
- Production item details
- Transport Planning item details
- Forecasting group/item details
- Kit lists
- Alternative items
- Global Item Maintenance add and amend details

#### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADIN | Add Item | |
| Execution Modes | User | 10 | Allowed | IN A2 1220 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEM | Item | |
| | BOD Reference | (15 characters) | Item code | |
| | Exit Node | (Blank) | Item created | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMIN | Amend Item | |
| Execution Modes | User | 10 | Allowed | IN A2 1220 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEM | Item | |
| | BOD Reference | (15 characters) | Item code | |
| | Exit Node | (Blank) | Item amended | (None) |

### Where Used Example

None

## Stockroom Details Maintenance (5/INM)

### Scope

This informs Work Management when a new item stockroom has been created or an item stockroom has been amended or deleted in Item Stockroom Maintenance. One activity code identifies an addition. A separate activity code identifies an amendment, which includes the deletion of the item stockroom.

### Constraints

As the amendment activity does not distinguish between change and deletion of the record, a subsequent interrogation element would be needed to identify whether the record still exists.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADINSK | Add Item Stockroom | |
| Execution Modes | User | 10 | Allowed | IN A2 1250 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEMSTKRM | Item Stockroom | |
| | BOD Reference | (18 characters) | Item plus / plus stockroom code | |
| | Exit Node | (Blank) | Item stockroom created | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMINSK | Amend Item Stockroom | |
| Execution Modes | User | 10 | Allowed | IN A2 1250 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial activity | |
| Output | Document Type | ITEMSTKRM | Item Stockroom | |
| | BOD Reference | (18 characters) | Item plus / plus stockroom code | |
| | Exit Node | (Blank) | Item stockroom amended or deleted | (None) |

### Where Used Example

None

## Copy Based on Item Creation (11/INM)

### Scope

This informs Work Management when a new item has been created.

An item created in this copy activity is identified by a different activity code used in standard Item Maintenance.

### Constraints

See the section on **Item Maintenance (2/INM)**.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGCPIN | Copy Item | |
| Execution Modes | User | 10 | Allowed | IN A2 4121 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEM | Item | |
| | BOD Reference | (15 characters) | Item code | |
| | Exit Node | (Blank) | Item created | |
| Output | Document Type | ITEMSTKRM | Item Stockroom | |
| | BOD Reference | (18 characters) | Item plus / plus stockroom code | |

| | | | | |
|---|---|---|---|---|
| | Exit Node | (Blank) | Item stockroom created | |

**Where Used Example**

None

## Linked Item Maintenance (10/INM)

**Scope**

Linked Item Maintenance utilises the standard Item Maintenance activity and therefore includes its Work Management enablement. Items added and changed in Linked Item Maintenance therefore output the same completion events. See the section on **Item Maintenance (2/INM)** further details.

Where Global Item Maintenance is active, the transfer of item definitions from one company to another is recognised by Work Management, with messages published to interested parties. See the section on **GIM (Item Update) (11/INC)**.

## Global Item Maintenance Item Update (11/INC)

**Scope**

There are two events that occur in Global Item Maintenance that will output a document to Work Management to assist in follow-up action.

For an item defined with a profile to push item definitions into a target company, outputs to Work Management occur when an item is added to the target company, or amended in the target company. This event might be used to notify a user in the target company that their item definition has been changed. There will be an output for each target company.

For an item defined with a profile to pull item definitions from the owning company, outputs to Work Management occur when the owner publishes a new item definition and makes it available to the partner company. This event might be used to notify a user in the target company that a new or modified item definition is now available. There will be an output for each target company.

**Constraints**

When pushing an item into a target company, the actual addition or amendment of that item in the target company is not itself detected and notified to Work Management with and Add or Amend event.

Similarly, when pulling an item definition into the target company in Linked Item Maintenance, the actual creation or amendment of that item in the target company is not itself detected and notified to Work Management. You would only get the Add or Amend event if you were to review the new definitions before accepting the update.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | INFORPUBITM | Publish Item | |
| Execution Modes | User | 10 | Allowed | IN A2 1350 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEM | Item | |
| | BOD Reference | (15 characters) | Item code | |
| | Exit Node | (Blank) | Item transferred | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | INFORPULITM | Pull Item | |
| Execution Modes | User | 10 | Allowed | IN A2 1350 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | ITEM | Item | |
| | BOD Reference | (15 characters) | Item code | |
| | Exit Node | (Blank) | Item published | (None) |

### Where Used Example

Global Item Maintenance: GIM1 Publish Item Definition

## Lot Header Maintenance (1/INL)

### Scope

This informs Work Management when a lot has been created or a lot has been amended in the Lot Maintenance activity.

The completion notification includes a reason code to identify whether the lot's Stock Status has been set (to something other than blank), or whether the Stock Status has been changed.

As well as being maintained in Lot Header Maintenance, lots can also be added and amended in Lot Transformation and Inventory Receipts etc. In all cases they write these same Add and Amend events.

### Constraints

None

**Work Management Parameters**

### Addition

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADLOT | Add Lot | |
| Execution Modes | User | 10 | Allowed | IN A2 1295 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | LOT | Inventory Lot | |
| | BOD Reference | (30 characters) | Item plus lot | |
| | Exit Node | (Blank) | Lot added | 01 Status set |
| | | | | Otherwise, added without a stock status |

### Amend

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMLOT | Amend Lot | |
| Execution Modes | User | 10 | Allowed | IN A2 1295 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | LOT | Inventory Lot | |
| | BOD Reference | (30 characters) | Item plus lot | |
| | Exit Node | (Blank) | Lot amended | 01 Status changed |
| | | | | Otherwise, amended without a stock status change |

### Where Used Example

None

## Single Step Transfer (43/INP)

### Scope

This informs Work Management of the two inventory transactions generated from posting a transfer in the Single Step Transfer activity.

The Transfer Out and Transfer In transactions are identified by different activity codes.

### Constraints

The transfer of frozen stock is identified by two further activity codes.

**Work Management Parameters**

### Movement Transfer Out

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGMVTFOT | Movement Transfer Out | |
| Execution Modes | User | 10 | Allowed | IN A2 4112 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | STOCKTRANF | Stock Transfer | |
| | BOD Reference | (11 digits) | Movement serial number | |
| | Exit Node | (Blank) | Movement posted | (None) |

### Movement Transfer In

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGMVTFIN | Movement Transfer In | |
| Execution Modes | User | 10 | Allowed | IN A2 4112 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | STOCKTRANF | Stock Transfer | |
| | BOD Reference | (11 digits) | Movement serial number | |
| | Exit Node | (Blank) | Movement posted | (None) |

### Where Used Example

None

## Frozen Stock Single Step Transfer (51/INP)

### Scope

This informs Work Management of the two inventory transactions generated from posting a transfer in the Frozen Stock Single Step Transfer activity.

The Frozen Transfer Out and Frozen Transfer In transactions are identified by different activity codes.

### Constraints

The transfer of un-frozen stock is identified by two further activity codes.

**Work Management Parameters**

### Movement Frozen Transfer Out

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGMFTFOT | Movement Frozen Transfer Out | |
| Execution Modes | User | 10 | Allowed | IN A2 4120 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | STOCKTRANF | Stock Transfer | |
| | BOD Reference | (11 digits) | Movement serial number | |
| | Exit Node | (Blank) | Movement posted | (None) |

### Movement Frozen Transfer In

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGMFTFIN | Movement Frozen Transfer In | |
| Execution Modes | User | 10 | Allowed | IN A2 4120 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | STOCKTRANF | Stock Transfer | |
| | BOD Reference | (11 digits) | Movement serial number | |
| | Exit Node | (Blank) | Movement posted | (None) |

### Where Used Example

None

## Record Transfer Out (41/INP)

### Scope

This informs Work Management when a new transfer order has been created in the Inventory Transfer Out activity.

The document reference is the automatically allocated Transfer Order number.

If the Record Transfer Out activity is started but subsequently abandoned (via **Exit (F3)**) without generating any item movements, a transfer order number will have been allocated but not actually used. This is indicated with a separate Order Cancelled exit node.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGENTOIN | Enter transfer order - Inventory | |
| Execution Modes | User | 10 | Allowed | IN A2 4112 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | TRANFORDER | Transfer Order | |
| | BOD Reference | (7 characters) | Transfer order number | |
| | Exit Node | 01 | Order created | (None) |
| | | 02 | Order cancelled | (None) |

### Where Used Example

None

## Confirm Shipment Receipt (42/INP)

### Scope

This informs Work Management when goods have been received against a transfer order in the Inventory Confirm Shipment Receipt activity.

One output node (Transfer Order) indicates a receipt of some kind has occurred against the transfer order, the business object document reference being the transfer order number.

A second output node (Transfer Order Receipt) identifies the transfer order line that has been receipted.

This would be most likely to be an initial activity, but also accepts a transfer order as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the receipt is being prepared based on notification of transfer shipment. When a transfer order number is passed to the Confirm Shipment Receipt activity by Work Management it will automatically complete the Distribution Order Number on the selection window.

Note: The Inventory, DRP and Production Transfer receipt activities are distinguished by different activity codes.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGRCTOIN | Receive Transfer Order - Inventory | |
| Execution Modes | User | 10 | Allowed | IN A2 4113 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | TRANFORDER | Transfer Order | |
| | BOD Reference | (7 characters) | Transfer order number | |
| Output | Document Type | TRANFORDER | Transfer Order | |
| | BOD Reference | (7 characters) | Transfer order number | |
| | Exit Node | (Blank) | Order received | (None) |
| Output | Document Type | TRANFRECPT | Transfer Receipt | |
| | BOD Reference | (10 characters) | Transfer order number (7) plus line number (3) | |
| | Exit Node | (Blank) | Order line received | (None) |

## Where Used Example

None

Tip: The Goods Receiving: GR1 Purchase Goods Receiving process has a similar example for Purchase Order receipts.

# Order Capture

## Order Taking

### Scope

This informs Work Management when a new sales order has been created in Order Capture. The business object document reference is the new sales order number.

An additional event notified to Work Management is the creation of a provision order when the input data has errors and cannot create a complete sales order. The output business object document reference in this case is a provisional order number.

Order Capture events are distinguished from other forms of order entry by the activity codes.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGOMOCRT | Order Capture Order Create | |
| Execution Modes | User | 10 | Allowed | (n/a) |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Sales order created | (None) |

### Where Used Example

Enterprise Orders: EO1.1 Sales Order Maintenance

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGOMPCRT | Order Capture Provisional Order Create | |
| Execution Modes | User | 10 | Allowed | (n/a) |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Provisional order number | |
| | Exit Node | (Blank) | Provisional order saved with errors | (None) |

### Where Used Example

Order Capture: OC1.1 Order in Error

## Order Amend

### Scope

This informs Work Management when a sales order has been amended in Order Capture. The create and amend have separate activity codes, but in both cases the business object document reference is the sales order number.

It is distinguished from other forms of order amendment by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGOMOAMD | Order Capture Order Amend | |
| Execution Modes | User | 10 | Allowed | (n/a) |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Sales order amended | (None) |

### Where Used Example

Enterprise Orders: EO1.1 Sales Order Maintenance

# Production Definition Management

## Enter Change Request (1/PDR)

### Scope

This informs Work Management when a new change request has been raised in the Enter Change Request activity, the new change number becoming the business object document reference.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENEC | Enter Engineering Change Request | |
| Execution Modes | User | 10 | Allowed | PD A2 1890 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CHANGEREQ | Change Request | |
| | BOD Reference | (9 characters) | Change request number | |
| | Exit Node | 01 | New change requested | (None) |

### Where Used Example

Engineering Change Management: EC1 Change Placement and Maintenance

## Amend Change Request (2/PDR)

### Scope

This informs Work Management when change request has been amended in the Amend Change Request activity; the change request number is the business object document reference.

This also accepts a change request as an input. This allows the amendment activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the amendment is being forced to correct a detected problem.

## Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMEC | Amend Engineering Change Request | |
| Execution Modes | User | 10 | Allowed | PD A2 1610 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CHANGEREQ | Change Request | |
| | BOD Reference | (9 characters) | Change request number | |
| Output | Document Type | CHANGEREQ | Change Request | |
| | BOD Reference | (9 characters) | Change request number | |
| | Exit Node | 01 | Change requested amended | (None) |

## Where Used Example

Engineering Change Management: EC1 Change Placement and Maintenance

# Production Order Control

## Enter Transfer Order (11/MDT)

### Scope

This informs Work Management when a new order has been created in the Production Transfer Order Entry activity, the new order number becoming the business object document reference.

> Note: Because Production Transfer orders are stored alongside other DRP and sales orders in the Sales Order Processing database, the business object document has the common type of 'Sales Order'.

It is distinguished from DRP order entry by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGENSOPC | Enter Transfer Order - Production | |
| Execution Modes | User | 10 | Allowed | DR A2 5007 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new order number | |
| | Exit Node | (Blank) | Transfer order created | (None) |
| | | 01 | Order suspended | (None) |

### Where Used Example

None

## Amend Transfer Order (12/MDT)

### Scope

This informs Work Management when a transfer order has been amended in the Production Transfer Order Amend activity, the order number being the business object document reference. It is distinguished from other forms of sales order amendment by the activity code.

Note: Because Production Transfer orders are stored alongside other DRP and sales orders in the Sales Order Processing database, the business object document has the common type of 'Sales Order'.

It is distinguished from DRP order entry by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMSOPC | Amend Transfer Order - Production | |
| Execution Modes | User | 10 | Allowed | DR A2 5008 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Order number | |
| | Exit Node | (Blank) | Transfer order amended | (None) |
| | | 01 | Order suspended | (None) |

### Where Used Example

None

## Confirm Shipment Receipt (14/MDT)

### Scope

This informs Work Management when goods have been received against a transfer order in the Production Transfer Order Confirm Shipment Receipt activity.

One output node (Sales Order) indicates that a receipt of some kind has occurred against the transfer order, the business object document reference being the transfer order number.

A second output node (Transfer Order Receipt) identifies that the transfer order line that has been receipted.

This would be most likely to be an initial activity, but also accepts a transfer order as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the receipt is being prepared based on notification of transfer shipment. When a transfer order number is passed to the Confirm Shipment Receipt activity by Work Management it will automatically complete the Distribution Order Number on the selection window.

Note: The Inventory, DRP and Production Transfer receipt activities are distinguished by different activity codes.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGRCTOPC | Receive Transfer Order - Production | |
| Execution Modes | User | 10 | Allowed | MD A2 5011 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | SALESORDER | DRP Order | |
| | BOD Reference | (7 characters) | DRP order number | |
| Output | Document Type | SALESORDER | DRP Order | |
| | BOD Reference | (7 characters) | DRP order number | |
| | Exit Node | (Blank) | Order received | (None) |
| Output | Document Type | TRANFRECPT | Transfer Receipt | |
| | BOD Reference | (10 characters) | Transfer order number (7) plus line number (3) | |
| | Exit Node | (Blank) | Order line received | (None) |

### Where Used Example

None

Tip: The Goods Receiving: GR1 Purchase Goods Receiving process has a similar example for Purchase Order receipts.

# Purchase Management

## Purchase Order Entry (41/PMP)

### Scope

This informs Work Management when a new purchase order has been created in Purchase Management Order Entry, the new purchase order number becoming the business object document reference. It is distinguished from other forms of order creation by the activity code.

### Constraints

When Purchase Order Entry and Amend is under Work Management control, the Print Order Immediately option is not available and the Fax option does not send the fax immediately. It is assumed that the Purchase Authorisation process will control the printing, faxing or sending of or the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/ Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENPO | Enter Purchase Order | |
| Execution Modes | User | 10 | Allowed | PM A2 1210 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A new purchase order number | |
| | Exit Node | 01 | Order created | (None) |

### Where Used Example

Purchase Authorisation: PA1 Purchase Order Creation and Amendment

Purchase Order Tracking: POT0 Tracking

Enterprise Orders: EO1.2 Purchase Order Maintenance

## Purchase Order Amendment (42/PMP)

### Scope

This informs Work Management when a purchase order has been amended in Purchase Management Order Amendment; the purchase order number is the business object document reference.

This also accepts a purchase order as an input. This allows the amendment activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the amendment is being forced to correct a detected problem.

### Constraints

When Purchase Order Entry and Amend is under Work Management control the Print Order Immediately option is not available and the Fax option does not send the fax immediately. It is assumed that the Purchase Authorisation process will control the printing, faxing or sending of or the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMPO | Amend Purchase Order | |
| Execution Modes | User | 10 | Allowed | PM A2 1220 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order amended | (None) |

### Where Used Example

Purchase Authorisation: PA1 Purchase Order Creation and Amendment

Purchase Authorisation: PA1.1 Creation of Orders from Requisitioning

Purchase Order Tracking: POT0 Tracking

Enterprise Orders: EO1.2 Purchase Order Maintenance

## New Orders Audit Report (31/PMR)

### Scope

When a purchase order number is passed to the New Orders Audit Report activity by Work Management it will release that single order.

When run in User Invoked mode it can use the same task as the Automatic modes, bypassing the selection window.

When executed in any of the Automatic modes it can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed release request, with reason codes to give further detail as to the reason for failure. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRLPO | Release Purchase Order | |
| Execution Modes | User | 10 | Allowed | PM A2 1510 |
| | Automatic | 20 - 40 | Allowed | PM A2 1510 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order released | (None) |
| | | 02 | Failed to release order | 01 Order cancelled |
| | | | | 02 Order already released |
| | | | | 03 Order locked |

### Where Used Example

Purchase Authorisation: PA3 Documentation Preparation

Purchase Order Tracking: POT0 Tracking

Enterprise Orders: EO1.3 Create Enterprise Order

## Purchase Order Print (33/PMR)

### Scope

When a purchase order number is passed to the Purchase Order Print activity by Work Management it will print that single order.

When run in User Invoked mode it can use the same task as the Automatic modes, bypassing the selection window.

When executed in any of the Automatic modes it can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed print request, with reason codes to give further detail as to the reason for failure. The failure reason code includes identifying orders that should not be printed, but should be faxed or sent by EDI. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRPO | Print Purchase Order | |
| Execution Modes | User | 10 | Allowed | PM A2 1530 |
| | Automatic | 20 - 40 | Allowed | PM A2 1530 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order printed | (None) |
| | | 02 | Failed to print order | 01 Order cancelled |
| | | | | 02 Incorrect order status |
| | | | | 03 Order to be faxed |
| | | | | 04 EDI order |

### Where Used Example

Purchase Authorisation: PA3 Documentation Preparation

## Send Purchase Orders (1/PMAI)

### Scope

When a purchase order number is passed to the Send Purchase Order activity by Work Management it will process that single order through the Application Interface; often via EDI.

- When the execution mode is User Invoked, the usual selection window is displayed. The user can then select the appropriate options and submit the job.
- When executed in any of the Automatic modes, the single order is sent automatically. It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed send request, with reason codes to give further detail as to the reason for failure. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGSDPO01 | Send Purchase Order | |
| Execution Modes | User | 10 | Allowed | PM A2 7000 |
| | Automatic | 20 - 40 | Allowed | PM A2 3130 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order sent | (None) |
| | | 02 | Failed to send order | 01 Order cancelled |
| | | | | 02 Not required to be sent |
| | | | | 03 No lines on order |
| | | | | 04 Supplier not active in AI |

### Where Used Example

Purchase Authorisation: PA3 Documentation Preparation

## Goods Receiving (43/PMP)

### Scope

This informs Work Management when goods have been received against a purchase order in the Goods Receiving activity.

One output node for the Purchase Order indicates the purchase order that has been received, the business object document reference being the purchase order number.

A second set of output nodes identifies the new Goods Receipt Number that has been raised, and indicates with one of three separate values the receipt location.

This would be most likely to be an initial activity but also accepts a purchase order as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the receipt is being driven by notification by an advanced shipment notice. When a purchase order number is passed to the Goods Receiving activity by Work Management it will automatically complete the purchase order number on the selection window.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRCPG | Receive Purchased Goods | |
| Execution Modes | User | 10 | Allowed | PM A2 1230 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order received | (None) |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and 7 digit goods received note number | |
| | Exit Node | 01 | Receipt to goods inward | (None) |
| | | 02 | Receipt to inspection | (None) |
| | | 03 | Receipt to stores | (None) |

## Where Used Example

Goods Receiving: GR1 Purchase Goods Receiving

# Returns and Adjustments (44/PMP)

## Scope

This informs Work Management when received goods have been returned or the balance adjusted against a goods receipt note number in the Returns and Adjustments activity.

One output node for the GRN indicates the goods receipt note number that has been adjusted, the business object document reference being the GRN number.

A second output node identifies the new Rejection Note Number that has been raised.

This would be most likely to be an initial activity but also accepts a GRN as an input. This allows the receiving activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the adjustment is being driven by some external event. When a GRN number is passed to the Returns and Adjustment activity by Work Management it will automatically complete the GRN order number on the selection window.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRTGR | Return Goods Received | |
| Execution Modes | User | 10 | Allowed | PM A2 1240 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | GRN updated | (None) |
| Output | Document Type | PURREJECT | Purchase Rejection Note | |
| | BOD Reference | (7 digits) | A rejection note number | |
| | Exit Node | 01 | Rejection note created | (None) |

### Where Used Example

Goods Receiving: GR3 Returns and Adjustments

## Transfer Goods Location (45/PMP)

### Scope

This informs Work Management when received goods have been transferred between receipt locations against a goods receipt note number in the Transfer Goods Location activity.

The output node for the GRN has one of three values to indicate into which location the goods have been transferred, the business object document reference being the GRN number.

This would be most likely to be an initial activity but also accepts a GRN as an input. This allows the transfer activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the transfer is being driven by some external event. When a GRN number is passed to the Transfer activity by Work Management it will automatically complete the GRN order number on the selection window.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGTRGR | Transfer Goods Received | |
| Execution Modes | User | 10 | Allowed | PM A2 1250 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | Transfer to goods inward | (None) |
| | | 02 | Transfer to inspection | (None) |
| | | 03 | Transfer to stores | (None) |

### Where Used Example

Goods Receiving: GR2 Transfer Goods Location

## Print GRNs (34/PMR)

### Scope

When a GRN number is passed to the Print GRNs activity by Work Management it will print that single goods received note.

- When the execution mode is User Invoked, the purchase order number is automatically completed on the selection window. The user can then select the option to submit the print.
- When executed in any of the Automatic modes, the order is printed automatically. It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed release request, with reason codes to give further detail as to the reason for failure. The failure reason code includes identification of orders that should not be printed, but should be faxed or sent by EDI. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRGR | Print GRN | |
| Execution Modes | User | 10 | Allowed | PM A2 1540 |
| | Automatic | 20 - 40 | Allowed | PM A2 1545 |
| Input | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | GRN printed | (None) |
| | | 02 | GRN not printed | 01 GRN already printed |
| | | | | 02 GRN reference not found |

### Where Used Example

Goods Receiving: GR5 GRN Printing

# Requisitioning

## Requisition Confirmation (11/RQP)

### Scope

When a requisition number is passed to the Requisition Confirmation activity by Work Management it will process that single requisition. This is only appropriate in a User Invoked mode.

It could be used where a requisition is known to have an error and the Requisition Confirmation activity is needed to correct the data.

One output indicates the requisition has been confirmed. This might be used in a process to make a new attempt to create a purchase order from the amended requisition.

Two further outputs are applicable for Enterprise Supply Chain Processing.

- A sales order is output where the requisition is for an enterprise supply, and can be used to drive a fresh attempt to create the enterprise purchase order. It is the sales order number in the output business object that is used to build enterprise supplies.
- A purchase order is output where the requisition is for an enterprise replenishment order.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAREQNCFN | Requisition Confirmation | |
| Execution Modes | User | 10 | Allowed | RQ A2 1090 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | REQUISITN | Requisition | |
| | BOD Reference | (7 digits) | A requisition number | |
| Output | Document Type | REQUISITN | Requisition | |
| | BOD Reference | (7 digits) | A requisition number | |
| | Exit Node | (Blank) | Requisition Updated | (None) |

| | | | | |
|---|---|---|---|---|
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A sales order number | |
| | Exit Node | (Blank) | Re-run create purchase order | (None) |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | (Blank) | Re-run Enterprise purchase order | (None) |

### Where Used Example

Enterprise Orders: EO1.4 Requisition Error Handling

## Create Purchase Orders (31/RQP)

### Scope

For every requisition processed, Work Management is informed of every successful conversion to a Purchase Order or any failure to turn the requisition into an order.

- When a requisition is successfully processed, the output document type is a purchase order, with an output node to indicate either that a new purchase order has been created, or that an existing purchase order has been updated. In either case, the business object reference is the purchase order number.
- When it fails to convert a requisition to a purchase order, the output document type is the requisition, with a reason code to indicate the reason for failure.

A purchase order created by this activity is distinguished from orders created by purchase order entry by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCRPORQ | Create Purchase Order from Requisition | |
| Execution Modes | User | 10 | Allowed | RQ A2 1040 |
| | Automatic | 20 - 40 | Not applicable | |

| | | | | |
|---|---|---|---|---|
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order created | (None) |
| | | 02 | Order updated | (None) |
| Output | Document Type | REQUISITN | Requisition | |
| | BOD Reference | (7 digits) | A requisition number | |
| | Exit Node | 01 | Failed to convert requisition | 01 Item error |
| | | | | 02 Supplier error |
| | | | | 03 Vendor error |
| | | | | 04 Planner error |
| | | | | 05 Authorisation required |
| | | | | 06 Record is locked |

## Where Used Example

Purchase Authorisation: PA1.1 Creation of Orders from requisitioning

Enterprise Orders: EO1.2 Purchase Order Maintenance

# Sales Order Processing

## Customer Maintenance (2/OEM)

### Scope

This informs Work Management when new sales details have been created or sales details have been amended.

It also informs Work Management when a new delivery address has been created or a delivery address has been amended. It returns a reason code to identify whether the delivery point's Account Status has been set (to something other than blank) indicating that the delivery point is on stop, or whether the account status has been cleared, indicating that the delivery point is now off stop.

Delivery addresses can also be added in Accounts Receivable Delivery Address Maintenance. These additions and changes are identified with different activity codes. See the AR Delivery Address Maintenance section for further details.

### Constraints

There are a number of customer-related activities that have
not
been enabled. These should be considered when building a new solution in case any of these details are relevant. They are:

- World Trade customer details
- Advanced Customer Scheduling customer and delivery point defaults
- Advanced Shipping customer and delivery point defaults

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADOECS | Add Customer Sales Details | |
| Execution Modes | User | 10 | Allowed | OE A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Delivery point added | (None) |
| Section | Parameter | Codes | Description | Tasks/Reasons |
| Activity Code | | GESGAMOECS | Amend Customer Sales Details | |
| Execution Modes | User | 10 | Allowed | OE A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Delivery point amended | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADOEDA | Add Delivery Address | |
| Execution Modes | User | 10 | Allowed | OE A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Delivery address added | 01 On stop |
| | | | | 02 Suspended |
| | | | | 03 Flagged for deletion |
| | | | | 04 Unknown status |
| | | | | 05 Litigation |

| | | | | |
|---|---|---|---|---|
| | | | | Otherwise, active |
| Section | Parameter | Codes | Description | Tasks/Reasons |
| Activity Code | | GESGAMOEDA | Amend Delivery Address | |
| Execution Modes | User | 10 | Allowed | OE A2 2020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (12 characters) | Customer code/delivery sequence | |
| | Exit Node | (Blank) | Delivery address amended | 01 Now on stop |
| | | | | 02 Now off stop |
| | | | | Otherwise, amended without any specific condition |

### Where Used Example

Release from Credit Stop: RCS1 New Account

Release from Credit Stop: RCS2 Amended Account

Release from Credit Stop: RCS1 Amended Delivery Point

## Customer Item Maintenance (13/OEM)

### Scope

This informs Work Management when a new Customer Item profile has been created or a Customer Item profile has been amended or deleted in Customer Item Maintenance. Separate activity codes identify between an addition and an amendment. Different exit nodes on the amendment distinguish an amendment from a deletion.

### Constraints

The single exit node only indicates that a customer item profile has been created or amended; it does not identify the state or content of that profile, information that is often required. If that level of detail were to be needed, you would have to follow this activity in the process with an interrogation element of some kind to decide whether the event is relevant and what path to follow next.

**Work Management Parameters**

### Create

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGADCSIN | Add Customer Item | |
| Execution Modes | User | 10 | Allowed | OE A2 3710 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CUSTITEM | Customer Item | |
| | BOD Reference | (26 Characters digits) | Customer plus Delivery Seq plus Item | |
| | Exit Node | (Blank) | Customer item created | (None) |

### Amend and Delete

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGAMCSIN | Amend Customer Item | |
| Execution Modes | User | 10 | Allowed | OE A2 3710 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CUSTITEM | Customer Item | |
| | BOD Reference | (26 Characters digits) | Customer plus Delivery Seq plus Item | |
| | Exit Node | 01 | Customer item amended | (None) |
| | | 02 | Customer item deleted | (None) |

### Where Used Example

None

## Transcriptional Order Entry (1/OEP)

### Scope

This informs Work Management when a new sales order has been created in Transcriptional Order Entry, the new sales order number becoming the business object document reference. It is distinguished from other forms of order entry by the activity code.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required, you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENSOTN | Enter Sales Order Transcriptional | |
| Execution Modes | User | 10 | Allowed | OE A2 1010 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Sales order created | (None) |

### Where Used Example

Order Fulfilment: OF 1.1 Order Placement

## Conversational Order Entry (2/OEP)

### Scope

This informs Work Management when a new sales order has been created in Conversational Order Entry, the new sales order number becoming the business object document reference. It is distinguished from other forms of order entry by the activity code.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required, you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGENSOCN | Enter Sales Order Conversational. | |
| Execution Modes | User | 10 | Allowed | OE A2 1020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Sales order created | (None) |

### Where Used Example

None

## Receive Orders (21/OEAI)

### Scope

This informs Work Management when a new sales order has been created in the Application Interface Receive Orders, the new sales order number becoming the business object document reference. It is distinguished from other forms of order entry by the activity code.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required, you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRCSOED | Receive Sales Order EDI | |
| Execution Modes | User | 10 | Allowed | OE A2 700 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Order received | |

### Where Used Example

Order Fulfilment: OF1.1 Order Placement

## Transcriptional Order Amend (3/OEP)

### Scope

This informs Work Management when a sales order has been amended in Transcriptional Order Amend, the sales order number being the business object document reference. It is distinguished from other forms of order amendment by the activity code.

Note: WM is not triggered from this activity until the user selects **Exit (F3)** to exit the menu option. This is so that multiple triggers are not written when amending header, lines and/or trailer.

### Constraints

None

**Work Management Parameters**

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMSOTN | Amend Sales Order Transcriptional | |
| Execution Modes | User | 10 | Allowed | OE A2 1050 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Sales order amended | (None) |

### Where Used Example

Order Fulfilment: OF1.2 Order Amendment

## Conversational Order Amend (4/OEP)

### Scope

This informs Work Management when a sales order has been amended in Conversational Order Amend, the sales order number being the business object document reference. It is distinguished from other forms of order amendment by the activity code.

Note: WM is not triggered from this activity until the user selects **Exit (F3)** to exit the menu option. This is so that multiple triggers are not written when amending header, lines and/or trailer.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGAMSOCN | Amend Sales Order Conversational | |
| Execution Modes | User | 10 | Allowed | OE A2 1060 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Sales order amended | (None) |

### Where Used Example

None

## Order Cancellation (7/OEP)

### Scope

This informs Work Management when either the whole order, or one or more lines on an order, has been cancelled in Sales Order Cancellation. There are separate output nodes to distinguish between a whole order and line cancellation; in both cases the output business object document reference is a sales order number.

### Constraints

The output business object does not identify individual order line numbers.

Although the output nodes do not identify the reason for cancellation, it would be possible to follow this cancellation in the process with another element to interrogate the sales order and identify the cancellation reason code.

**Work Management Parameters**

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCLSO | Cancel Sales Order | |
| Execution Modes | User | 10 | Allowed | OE A2 1040 |
| | Automatic | 20 - 40 | Not allowed | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Whole order cancelled | (None) |
| | | 01 | Order lines cancelled | (None) |

### Where Used Example

Order Fulfilment: OF 1.2 Order Amendment

## Order Acknowledgements (1/OER)

### Scope

Where the Order Acknowledgements activity is run for a sales order known to Work Management, it will output a number of completion details.

Where it is preceded by an element dealing with a sales order, and Order Acknowledgements is launched from an action list, the input document type is that Sales Order number and is pre-filled on the selection window. Where it is executed in batch by the Work Management Engine, it will process the input sales order.

On a successful generation of an acknowledgement, the Sales Order is identified as successfully printed

If the activity is unable to print an acknowledgement, an exit node identifies the sales order with a reason code for the failure.

A separate activity code is used to identify an acknowledgement re-print. It is assumed that the print and re-print activities would be separate elements in a process. The input document reference is a sales order in both cases.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRSOAC | Print Sales Order Acknowledgement | |

| | | | | |
|---|---|---|---|---|
| Execution Modes | User | 10 | Allowed | OE A2 3010 |
| | Automatic | 20 - 40 | Allowed | OE A2 4040 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Acknowledgement printed | (None) |
| | | 01 | Failed to print acknowledgement | 01 Acknowledgement not required for this customer |
| | | | | 02 Acknowledgement already printed |
| | | | | 03 Document is a quotation |

### Where Used Example

Order Fulfilment: OF1.5 Order Acknowledgement

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRPSOAC | Re-print Sales Order Acknowledgement | |
| Execution Modes | User | 10 | Allowed | OE A2 3010 |
| | Automatic | 20 - 40 | Allowed | OE A2 4050 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Acknowledgement printed | (None) |
| | | 01 | Failed to re-print acknowledgement | 01 Acknowledgement not required for this customer |
| | | | | 02 Acknowledgement not previously printed |
| | | | | 03 Document is a quotation |

### Where Used Example

Order Fulfilment: OF1.2.2 Order Re-acknowledgement

## Suspended Order Release (5/OEP)

### Scope

This accepts an order as input and populates the order number selection window so that the user can accept the order for release from suspension. If run in batch mode, it automatically releases that order from suspension.

It also allows a customer as input and populates the customer field on the selection window. The user can then choose which orders, if any, should be released.

### Constraints

When using the customer code entry format this cannot be run in batch mode.

If a customer and a delivery point are passed as input, the delivery sequence number will be ignored.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRLSO | Release a Single Suspended Order | |
| Execution Modes | User | 10 | Allowed | OE A2 1070 |
| | Automatic | 20 - 40 | Allowed | OE A2 1075 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Order released from suspension | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
| --- | --- | --- | --- | --- |
| Activity Code | | GESGRLCSSC | Release Orders for Customer | |
| Execution Modes | User | 10 | Allowed | OE A2 1070 |
| | Automatic | 20 - 40 | Not allowed | |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | (Blank) | Order released from suspension | (None) |

### Where Used Example

Order Fulfilment: OF1.2 Order Amendment

Order Fulfilment: OF1.4.1 Suspended Order Validation

Release from Credit Stop: RCS2 Amended Account

Release from Credit Stop: RCS3 Amended Delivery Point

## Manual Allocation by Order (8/OEP)

### Scope

This informs Work Management when one or more lines on an order have been allocated or de-allocated in Manual Allocation by Order. There is single output to indicate that there has been a change of allocation status on the order, the business object document reference being the sales order number.

### Constraints

The exit node does not attempt to identify all the possible events that may have occurred within the execution of the activity; such as allocate one line, de-allocate another, etc.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGALSOMO | Allocate Sales Order; Manual by Order | |
| Execution Modes | User | 10 | Allowed | OE A2 1030 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Allocation status changed | (None) |

### Where Used Example

Order Fulfilment: OF 1.3 Stock Allocation

## Manual Allocation by Item (9/OEP)

### Scope

This informs Work Management when a line on an order has been allocated or de-allocated in Manual Allocation by Item. The output node indicates that there has been a change of allocation status on an order, the business object document reference being the sales order number.

There is a separate output as each line on the window is selected and processed, so there is one completion event per order line.

### Constraints

The output business object does not identify the sales order line and the exit node does not attempt to separate allocation and de-allocation events; it merely identifies there has been a change of allocation status on the order. This makes it consistent with Manual Allocation by Order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGALSOMI | Allocate Sales Order; Manual by Item | |
| Execution Modes | User | 10 | Allowed | OE A2 1140 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Allocation status changed | (None) |

### Where Used Example

Order Fulfilment: OF1.3 Stock Allocation

## Batch Allocation (10/OER)

### Scope

As sales order lines are processed, Work Management is informed of every sales order that has had at least one order line considered for allocation.

There is single output for each order to indicate that batch allocation has completed normally for the order, the output business object document reference being the sales order number. It does not indicate whether the allocation was successful or not, it merely indicates that the order was due for consideration for allocation and that batch allocation has completed its processing. All orders in this category have an output with the blank exit node.

The one exception is where a sales order is cancelled because part deliveries are not allowed on a back order; then a separate exit node is output for the order.

### Constraints

To identify whether the allocation was successful or whether the order was suspended, etc., this activity will need to be followed by an element to analyse the state of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGALSOB | Allocate Sales Order; Batch | |
| Execution Modes | User | 10 | Allowed | OE A2 3100 |
| | Automatic | 20 - 40 | Allowed | OE A2 4120 |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Batch allocation completed normally | |
| | | 02 | Order cancelled | 01 Back orders and part deliveries not allowed |

### Where Used Example

Order Fulfilment: OF1.3 Stock Allocation

## Picking Notes (2/OER)

### Scope

Where the Picking Notes activity is run for a sales order known to Work Management, it will output a number of completion details.

Where it is preceded by an element dealing with a sales order, the input document type is that Sales Order number. On a successful generation of a picking note, the Sales Order is identified as successfully processed and a Pick Note completion identifies the pick note created.

If the activity is unable to generate a picking note, an exit node identifies the sales order with a reason code for the failure.

Where a customer is managed using Manual Pick Notes, there is no pick note completion; instead the sales order is completed with an alternative exit node.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRPNTE | Print Pick Note | |
| Execution Modes | User | 10 | Allowed | OE A2 3020 |
| | Automatic | 20 - 40 | Allowed | OE A2 3020 |

| | | | | |
|---|---|---|---|---|
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Order processed | (None) |
| | | 01 | Failed to create pick note | 01 No stock allocated |
| | | | | 02 Quotation |
| | | | | 03 Order is suspended |
| | | | | 04 Record locked |
| | | 02 | Manual pick request | (None) |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank) | Pick note created | (None) |

### Where Used Example

Order Fulfilment: OF2 Order Delivery

## Pick Note Cancellation (12/OER)

### Scope

If the input is supplied from a preceding activity in a process, and Pick Note Cancellation is launched from an action list, the initial window is pre-filled with the pick note number.

On a successful cancellation of a pick note, this will output a completion of the pick note document with the pick note reference.

It will also output an exit node for the sales order document, with the sales order number, so it might be used to drive the re-processing of the order. For instance, the next element might be an allocation activity.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Activity Code | | JBAGCNPNCN | Cancel Pick Note | |
| Execution Modes | User | 10 | Allowed | OE A2 3120 |
| | Automatic | 20 - 40 | Not Applicable | |
| Input | Document Type | PICKNOTE | Pick Note | |
| | BOD Ref | (9 characters) | Sales order number plus picking sequence | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | Sales order number plus picking sequence | |
| | Exit Node | (Blank) | Pick note cancelled | (None) |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | (Blank) | Sales order had pick note cancelled | (None) |

### Where Used Example

None

## Interactive Confirm Despatch (10/OEP)

### Scope

This accepts a pick note known to Work Management and returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the input is supplied from a preceding activity in a process, and Confirmation of Despatch is launched from an action list, the initial window is pre-filled with the pick note number.

There is a similar activity for despatches from a warehouse-controlled stockroom. See the section on **Confirm Despatch (8/WHP)** for further details.

Fast Batch confirmation of despatch is similarly enabled. See the section on **Confirmation of Despatch (14/OER)** for further details.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCNDSPI | Confirm Despatch Interactive | |
| Execution Modes | User | 10 | Allowed | OE A2 1080 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PICKNOTE | Pick Note | |
| | BOD Ref | (9 characters) | A sales order plus pick note sequence | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank ) | Pick Note Despatched | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | (Blank ) | Invoice generated | (None) |
| | | 01 | Consolidated invoice generated or updated | (None) |

### Where Used Example

Order Fulfilment: OF2 Order Delivery

Enterprise Orders: EO2 Order Delivery

## Fast Batch Confirm Despatch (11/OEP)

### Scope

For each pick note added to the Fast Batch list, Work Management is informed of the pick note logged ready for dispatch.

The subsequent run of Batch Confirm despatch will complete each of these request pick notes. See the section on **Confirmation of Despatch (14/OER)** for further details.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCNDFAS | Confirm Despatch Fast | |
| Execution Modes | User | 10 | Allowed | OE A2 1090 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank) | Pick note logged for despatch | (None) |

### Where Used Example

None

## Batch Confirmation of Despatch (14/OER)

### Scope

As it processes each requested pick note on the Fast Batch list, this informs Work Management that the despatch has been processed and invoiced.

If the confirmation is successful, it returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the confirmation is not successful, it returns a different exit node together with a reason codes to identify the reason why the despatch cannot be confirmed.

There is a similar activity for despatches from a warehouse-controlled stockroom. See the section on **Confirm Despatch (8/WHP)** for further details.

Interactive confirmation of despatch is similarly enabled. See the section on **Interactive Confirm Despatch (10/OEP)** for further details.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCNDSBC | Confirm Despatch Batch | |

| | | | | |
|---|---|---|---|---|
| Execution Modes | User | 10 | Allowed | OE A2 3160 |
| | Automatic | 20 - 40 | Allowed | ??? |
| Input | Document Type | PICKNOTE | Pick Note | |
| | BOD Ref | (9 characters) | A sales order plus pick note sequence | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank) | Pick note despatched | |
| | | 01 | Failed confirm despatch | 01 Pick note has been cancelled |
| | | | | 02 Pick note has already been invoiced |
| | | | | 03 Pick note contains lot, batch or serial items |
| | | | | 04 Catchweight item type 1 or 2 |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | (Blank) | Invoice generated | |
| | | 01 | Consolidated invoice generated or updated | (None) |

### Where Used Example

Enterprise Orders: EO2 Order Delivery

## Release Held Invoice (17/OEP)

### Scope

This informs Work Management when an invoice has been released from its held invoice state by the Release Held Invoice activity. Where the invoice has been reviewed and at least one line been set to Free of Charge, Work Management is informed the state of the invoice has changed.

This can also be called by Work Management where a user needs to be directed to release an invoice. In this Input mode, the initial invoice selection window is bypassed and the details of invoice displayed. If at least one invoice line is set to Free of Charge by the user, the output invoice completion trigger is written.

### Constraints

The single exit node only identifies that at least one invoice line has been changed; it does not identify the state of the complete content of the invoice, so it is possible that other lines may still have no price and therefore require re-pricing.

It is therefore recommended that this activity be followed by another attempt to print and process the invoice; this will identify if there are any further reasons for holding the invoice.

Work Management Parameters

| Section | Parameter | Code | Description/Notes |
|---|---|---|---|
| Activity Code | | GESGRLINV | |
| Task Code | | OE A2 1180 | |
| Execution Modes | User | 10 | Allowed |
| | Automatic | 20 - 40 | Not applicable |
| Input | Document Type | INVOICE | Sales Invoice |
| | BOD Reference | (7 characters) | A sales invoice number |
| Output | Exit Node | (Blank ) | Invoice released |
| | Document Type | INVOICE | Sales Invoice |
| | BOD Reference | (7 characters) | A sales invoice number |
| | Reason Codes | (None) | |

### Where Used Example

None

Note: This activity can be launched from the Invoice Not Priced manual activity in JOF Order Fulfilment, but the activity is not an element in the active process.

## Invoices and Credit Notes (3/OER)

### Scope

The Invoice and Credit Note print activity can identify both invoices and credit notes known to Work Management and output a number of completion details.

To identify whether the document being processed is an invoice or a credit note, there are separate activity codes with their own document types. It is assumed that these activities would be separate elements in a process. The input document reference is therefore an invoice or credit note number.

On the successful printing of a document, the Invoice or Credit note is identified as successfully printed

If the activity is unable to print the document, an exit node identifies the document with a reason code for the failure.

## Constraints

The option on the print selection window to post invoices is removed if Work Management is active. This is on the assumption that you will control the Invoice Posting separately from the Invoice Printing. See the section on 15/OER Invoice Posting for further details.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRIN | Print Invoice | |
| Execution Modes | User | 10 | Allowed | OE A2 3030 |
| | Automatic | 20 - 40 | Allowed | OE A2 4110 |
| Input | Document Type | INVOICE | Invoice | |
| | BOD Ref | (7 characters) | Invoice number | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | (Blank) | Invoice printed | (None) |
| | | 01 | Failed invoice print | 01 Invoice waiting processing via Application Interface (EDI) |
| | | | | 02 Invoice is consolidated with period still open |
| | | | | 03 Invoice waiting printing of delivery documentation |
| | | | | 04 Invoice is not domestic |
| | | | | 05 Invoice is held for pricing |
| | | | | 06 Failed Euro conversion |

## Where Used Example

Order Fulfilment: OF3 Order Invoicing

Enterprise Orders: EO3 Invoicing

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPRCN | Print Credit Note | |

| | | | | |
|---|---|---|---|---|
| Execution Modes | User | 10 | Allowed | OE A2 3030 |
| | Automatic | 20 - 40 | Allowed | OE A2 4110 |
| Input | Document Type | CREDITNOTE | Credit Note | |
| | BOD Ref | (7 characters) | Credit note number | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | (Blank) | Credit note printed | (None) |
| | | 01 | Failed credit note print | 01 Credit note waiting processing via Application Interface (EDI) |
| | | | | 04 Credit note is not domestic |
| | | | | 05 Credit note held for Pricing |
| | | | | 06 Failed Euro conversion |

### Where Used Example

Returns Management: RM3 Returns Crediting

Enterprise Orders: EO4 Credit Note Processing

## Invoice and Credit Note Re-print (4/OER)

### Scope

Like the Invoice and Credit Note print, the re-print activity can identify both invoices and credit notes known to Work Management and output successful or failed completion details.

To identify whether the document being processed is an invoice or a credit note there are separate activity codes with their own document types. It is assumed that these activities would be separate elements in a process. The input document reference is therefore an invoice or credit note number.

On the successful printing of a document, the Invoice or Credit note is identified as successfully printed

If the activity is unable to print the document, an exit node identifies the failure.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRPIN | Re-print Invoice | |
| Execution Modes | User | 10 | Allowed | OE A2 3040 |
| | Automatic | 20 - 40 | Allowed | OE A2 3045 |
| Input | Document Type | INVOICE | Invoice | |
| | BOD Ref | (7 characters) | Invoice number | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | (Blank) | Invoice re-printed | (None) |
| | | 01 | Failed invoice re-print | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGRPCN | Re-print Credit Note | |
| Execution Modes | User | 10 | Allowed | OE A2 3030 |
| | Automatic | 20 - 40 | Allowed | OE A2 3045 |
| Input | Document Type | CREDITNOTE | Credit Note | |
| | BOD Ref | (7 characters) | Credit note number | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | (Blank) | Credit note re-printed | (None) |
| | | 01 | Failed credit note re-print | (None) |

## Where Used Example

Credit Diary: CD3.1Scheduled Call

Credit Diary: CD3.2 Pre-emptive Call

Credit Diary: CD3.3 Follow-up Call

Credit Diary: CD3.4 Incoming Call

Credit Diary: CD3.5 Reactive Call, Suspended Order

Credit Diary: CD3.6 Reactive Call, Cancelled Cash

# Invoice Posting (15/OER)

## Scope

The Invoice and Credit Note Posting activity can identify both invoices and credit notes known to Work Management and output a number of completion details.

To identify whether the document being processed is an invoice or a credit note there are separate activity codes with their own document types. It is assumed that these activities would be separate elements in a process. The input document reference is therefore an invoice or credit note number.

On the successful posting of a document, the Invoice or Credit note is identified as successfully posted

If the activity is unable to post the document, an exit node identifies the document with a reason code for the failure.

## Constraints

In the Print Invoices and Credit Notes activity the option to post invoices is removed from the selection window when Work Management is active, so that option performs just the printing, and this activity performs the posting. See the section on **Invoices/Credit Notes (4/OER)** for further details.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPSIN | Post Invoice | |
| Execution Modes | User | 10 | Allowed | OE A2 3170 |
| | Automatic | 20 - 40 | Allowed | OE A2 3180 |
| Input | Document Type | INVOICE | Invoice | |
| | BOD Ref | (7 characters) | Invoice number | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | (Blank) | Invoice posted | |
| | | 01 | Failed invoice posting | 01 Invoice is consolidated with period still open |
| | | | | 02 Invoice is held |
| | | | | 03 Reference already used |
| | | | | 04 Invoice is not domestic |

### Where Used Example

Order Fulfilment: OF3 Order Invoicing

Enterprise Orders: EO3 Invoicing

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGPSCN | Post Credit Note | |
| Execution Modes | User | 10 | Allowed | OE A2 3030 |
| | Automatic | 20 - 40 | Allowed | OE A2 4110 |
| Input | Document Type | CREDITNOTE | Credit Note | |
| | BOD Ref | (7 characters) | Credit number | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit number | |
| | Exit Node | (Blank) | Credit note posted | |
| | | 01 | Failed credit note posting | |

### Where Used Example

Enterprise Orders: EO4 Credit Note Processing

## Send Invoices (1/OEAI)

### Scope

Invoices that are not printed but instead are due to be sent via EDI are identified in the Print Invoices run and the invoice's print indicator set to 'E'. These invoices then have to be processed by this Send Invoices activity.

If this activity is built into a business process, the invoice becomes the input document type and the EDI posting is performed for that invoice. It can be user-invoked or automatically run by the Work Management Engine.

To identify whether the document being processed is an invoice or a credit note there are separate activity codes with their own document types. It is assumed that these activities would be separate elements in a process. The input document reference is therefore an invoice or credit note number.

When run in automatic mode, the selection options normally entered on the selection window are defaulted automatically from the Descriptions file, where the type is WMDF and code is the Activity Code.

There is an output exit node to indicate that the invoice was successfully sent.

There is an alternate exit node to indicate that the invoice failed to be sent, together with a reason code to denote the reason for the failure.

## Constraints

In the Print Invoices and Credit Notes activity, the option to post invoices is removed from the selection window when Work Management is active, so that option performs just the printing, and this activity performs the EDI posting. See the section on **Invoices/Credit Notes (4/OER)** for further details.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGSDIN01 | Send Invoice | |
| Execution Modes | User | 10 | Allowed | OE A2 7000 |
| | Automatic | 20 - 40 | Allowed | OE A2 4160 |
| Input | Document Type | INVOICE | Invoice | |
| | BOD Ref | (7 characters) | Invoice number | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | 01 | Invoice sent | |
| | | 02 | Failed to send invoice | 01 Not required to send |
| | | | | 02 Incorrect invoice status |
| | | | | 03 Customer does not exist |

## Where Used Example

Order Fulfilment: OF3 Order Invoicing

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGSDSN01 | Send Credit Note | |
| Execution Modes | User | 10 | Allowed | OE A2 7000 |
| | Automatic | 20 - 40 | Allowed | OE A2 4160 |
| Input | Document Type | CREDITNOTE | Credit Note | |
| | BOD Ref | (7 characters) | Credit number | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit number | |
| | Exit Node | 01 | Credit note sent | |

| | | | | |
|---|---|---|---|---|
| | | 02 | Failed to send credit note | 01 Not required to send |
| | | | | 02 Incorrect invoice status |
| | | | | 03 Customer does not exist |

### Where Used Example

None

## Send Acknowledgements (2/OEAI)

### Scope

This activity must replace the Sales Order Processing Acknowledgement Print function, as this processes all acknowledgements since it was last run (whether or not the customers are trading partners). It will send EDI messages where appropriate; otherwise it will print an acknowledgement. See the section on **Order Acknowledgements (1/OER)** for further details.

It will accept a sales order number as an input to print or process an acknowledgement for that order.

When run in automatic mode, the selection options normally entered on the selection window are defaulted automatically from the Descriptions file, where the type is WMDF and the code is the Activity Code.

The output nodes indicate whether the acknowledgment has been sent or printed.

If it cannot be sent, an alternative node is output.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGSDSO01 | Send Sales Order Acknowledgement | |
| Execution Modes | User | 10 | Allowed | OE A2 7010 |
| | Automatic | 20 - 40 | Allowed | OE A2 4150 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Order number | |

| | | | | |
|---|---|---|---|---|
| | Exit Node | 01 | Sent | (None) |
| | | 02 | Cannot be sent | 01 Order complete or cancelled, or acknowledgement not printed |
| | | 03 | Printed | (None) |

### Where Used Example

None

## OE Hierarchy Check

Note: This is not available as a menu option; it can only be run as part of a business process.

### Scope

This is used when a customer's credit stop or account status is changed to determine if related sales customers have the same credit status.

There are two entry modes:

- A customer account has come off account stop or one of the account suspension statuses. This will identify all the sales customers that are now effectively off stop as follows:
  - If the input customer is a sales customer and not in a hierarchy, the sales customer is output as now off stop. The exit node is blank.
  - If the input customer is a sales customer and in a hierarchy, it is deemed to be still on stop if any parent above it is on stop. The exit node is 01.
  - If the input customer is a hierarchy account, as long as there is no parent above it on stop, all lowest level sales customers are retrieved from legs in the hierarchy that are not on stop. This may result in a number of sales customers being output as off stop. The exit node is blank.
  - For each sales customer that is identified as not on stop, the single sales customer (8 characters) is output as long as all delivery points are not on stop. If there are delivery points on stop, only those not on stop are reported; the output is a Delivery Point document with an 11-character customer plus delivery sequence code. This may result in a number of delivery points being output as off stop. The exit node is blank.
  - If there are no sales customers now off stop, the activity returns a different exit node of 02 to indicate that there is no action.
- A customer account has been placed on account stop or one of the account suspension statuses. This will identify all the sales customers that are now effectively on stop as follows:

- If the input customer is a sales customer and not in a hierarchy, the sales customer is output as no sales customers on stop. The exit node 01.
- If the input customer is a sales customer and in a hierarchy, all lowest level sales customers are retrieved from legs in the hierarchy that were not previously on stop, and are now on stop. This may output a number of sales customers; the output is an 8-character customer code. The exit node is blank.
- If there are no sales customers now on stop, the activity returns a different exit node of 02 to indicate that there is no action.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGCKONST | Check On Stop | |
| Execution Modes | User | 10 | Allowed | OE A2 ???? |
| | Automatic immediate | 20 | Appropriate | OE A2 ???? |
| | Automatic | 30 - 40 | Possible | |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | (Blank) | Sales customer no longer on stop | (None) |
| | | 01 | All sales customers still on stop | (None) |
| | | 02 | Finished with customer | (None) |
| Output | Document Type | DELIVERYPT | Delivery Point | |
| | BOD Reference | (11 characters) | Customer code plus delivery sequence | |
| | Exit Node | (Blank) | Delivery point no longer on stop | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGCKOFST | Check Off Stop | |

| | | | | |
|---|---|---|---|---|
| Execution Modes | User | 10 | Allowed | OE A2 ???? |
| | Automatic immediate | 20 | Appropriate | OE A2 ???? |
| | Automatic | 30 - 40 | Possible | |
| Input | Document Type | CUSTOMER | Customer | |
| | BOD Ref | (8 characters) | Customer code | |
| Output | Document Type | CUSTOMER | Customer | |
| | BOD Reference | (8 characters) | Customer code | |
| | Exit Node | (Blank) | Sales customer on stop | (None) |
| | | 01 | No sales customers on stop | (None) |
| | | 02 | Finished with customer | (None) |

### Where Used Example

Release from Credit Stop: RCS2 Amended Account

Release from Credit Stop: RCS3 Amended Delivery Point

## Pro Forma Invoice Print

Note: This is not available as a menu option; it can only be run as part of a business process.

### Scope

This accepts a pro forma invoice number as an input to print a pro forma invoice for the single document.

It can be run in any of the automatic modes, but is not available to be run as user-invoked.

The output nodes indicate whether the pro forma invoice has been successfully printed or not.

### Constraints

There is also a re-print option which is identified by a different activity code.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGPRPFIN | Print Pro Forma Invoice | |

| | | | | |
|---|---|---|---|---|
| Execution Modes | User | 10 | Not appropriate | |
| | Automatic | 20 - 40 | Allowed | OE A2 3820 |
| Input | Document Type | PFINVOICE | Pro Forma Invoice | |
| | BOD Ref | (7 characters) | Pro forma invoice number | |
| Output | Document Type | PFINVOICE | Pro Forma Invoice | |
| | BOD Reference | (7 characters) | Pro forma invoice number | |
| | Exit Node | (Blank) | Printed | (None) |
| | | 01 | Failed to print | 01 Pro forma not required |
| | | | | 02 Pro forma already printed |

### Where Used Example

Pro Forma Invoice: PF1 Print Pro Forma Invoice

## Pro Forma Invoice Re-print (7/OER)

### Scope

This accepts a pro forma invoice number as an input to re-print a pro forma invoice for the single document.

The output nodes indicate whether the pro forma invoice has been successfully re-printed or not.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | GESGRPPFIN | Re-print Pro Forma Invoice | |
| Execution Modes | User | 10 | Allowed | OE A2 3830 |
| | Automatic | 20 - 40 | Allowed | OE A2 3830 |
| Input | Document Type | PFINVOICE | Pro Forma Invoice | |
| | BOD Ref | (7 characters) | Pro forma invoice number | |
| Output | Document Type | PFINVOICE | Pro Forma Invoice | |
| | BOD Reference | (7 characters) | Pro forma invoice number | |
| | Exit Node | (Blank) | Re-printed | (None) |
| | | 01 | Failed to re-print | 03 Pro forma not yet printed |

## Where Used Example

Pro Forma Invoice: PF1 Print Pro Forma Invoice

# Style Production Order Control

## Release Orders (2/P4M)

### Scope

This informs Work Management when a sub-contract purchase order has been created or updated in Style Production Order Release, the purchase order number being the business object document reference.

The first sub-contract operation on a production order will create a new purchase order. This is the Order Created exit node.

If there is a subsequent sub-contract operation on the production order for the same supplier, this may add that operation to the same purchase order. This is the Order Updated exit node.

The creation of a new Sub-contract purchase order is distinguished from other forms of purchase order creation by the activity code.

### Constraints

There is only the single activity code covering the events on this purchase order, whether it is the initial order creation or a subsequent update.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRPOSC | Create Purchase Order Sub-contract | |
| Execution Modes | User | 10 | Allowed | P4 A2 4020 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order created | (None) |
| | | 02 | Order updated | (None) |

### Where Used Example

None

# Order Completion (8/P4M)

### Scope

This informs Work Management when a sub-contract purchase order has been created or updated in Style Production Order Completion, the purchase order number being the business object document reference.

A purchase order can be created when a production order is re-opened.

The first sub-contract operation on a production order will create a new purchase order. This is the Order Created exit node.

If there is a subsequent sub-contract operation on the production order for the same supplier this may add that operation to the same purchase order. This is the Order Updated exit node.

The creation of a new Sub-contract purchase order is distinguished from other forms of purchase order creation by the activity code.

### Constraints

There is only the single activity code covering the events on this purchase order, whether it is the initial order creation or a subsequent update.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRPOSC | Create Purchase Order Sub-contract | |
| Execution Modes | User | 10 | Allowed | P4 A2 4050 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order created | (None) |
| | | 02 | Order updated | (None) |

### Where Used Example

None

# Style Purchase Management

## Purchase Order Entry (1/STPMP)

### Scope

This informs Work Management when a new purchase order has been created in Style Purchase Management Order Entry, the new purchase order number becoming the business object document reference. It is distinguished from other forms of order creation by the activity code.

### Constraints

When Style Purchase Order Entry and Amend is under Work Management control, the Print Order Immediately option is not available and the Fax option does not send the fax immediately. It is assumed that the Purchase Authorisation process will control the printing, faxing or sending of or the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASENSPO | Enter Purchase Order | |
| Execution Modes | User | 10 | Allowed | ST A2 3150 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A new purchase order number | |
| | Exit Node | 01 | Order created | (None) |

### Where Used Example

Style Purchase Authorisation: PAS1 Purchase Order Creation and Amendment

## Purchase Order Amendment (2/STPMP)

### Scope

This informs Work Management when a purchase order has been amended or cancelled in Style Purchase Management Order Amendment; the purchase order number is the business object document reference.

There are two exit nodes, one to indicate an amendment, the other to indicate that the order has been cancelled.

It also accepts a purchase order as an input. This allows the amendment activity to be defined in the middle of a process, user-invoked, so that it will be added to an action list, perhaps where the amendment is being forced to correct a detected problem.

### Constraints

When Purchase Order Entry and Amend is under Work Management control, the Print Order Immediately option is not available and the Fax option does not send the fax immediately. It is assumed that the Purchase Authorisation process will control the printing, faxing or sending of or the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASAMPO | Amend Purchase Order | |
| Execution Modes | User | 10 | Allowed | ST A2 3160 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order amended | (None) |
| | | 02 | Order cancelled | (None) |

### Where Used Example

Style Purchase Authorisation: PAS1 Purchase Order Creation and Amendment

Style Purchase Authorisation: PAS1.1 Creation of Orders from Requisitioning

## New Orders Audit Report (1/STPMR)

### Scope

When a purchase order number is passed to the Style New Orders Audit Report activity by Work Management it will release that single order.

When run in User Invoked mode, it can use the same task as the Automatic modes, bypassing the selection window.

When executed in any of the Automatic modes, it can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate a successful release, a failed release, or a cancelled order, with reason codes to give further detail as to the reason for failure. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRLPO | Release Purchase Order | |
| Execution Modes | User | 10 | Allowed | ST A2 3370 |
| | Automatic | 20 - 40 | Allowed | ST A2 3370 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order released | (None) |
| | | 02 | Failed to release order | 01 Order locked |
| | | 03 | Cancelled purchase order | (Blank) Cancelled purchase order |

### Where Used Example

Style Purchase Authorisation: PAS3 Documentation Preparation

## Purchase Order Print (3/STPMR)

### Scope

When a purchase order number is passed to the Style Purchase Order Print activity by Work Management it will print that single order.

When run in User Invoked mode, it can use the same task as the Automatic modes, bypassing the selection window.

When executed in any of the Automatic modes, it can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed print request, with reason codes to give further detail as to the reason for failure. The failure reason code includes identifying orders that should not be printed, but should be faxed or sent by EDI. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRPO | Print Purchase Order | |
| Execution Modes | User | 10 | Allowed | ST A2 3390 |
| | Automatic | 20 - 40 | Allowed | ST A2 3390 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order printed | (None) |
| | | 02 | Failed to print order | 01 Order cancelled |
| | | | | 02 Order to be faxed |
| | | | | 03 EDI order |
| | | | | 04 No order lines |

### Where Used Example

Style Purchase Authorisation: PAS3 Documentation Preparation

## Send Purchase Orders (1/STPMAI)

### Scope

When a purchase order number is passed to the Style Send Purchase Order activity by Work Management it will process that single order through the Application Interface; often via EDI.

- When the execution mode is User Invoked, the usual selection window is displayed. The user can then select the appropriate options and submit the job.
- When executed in any of the Automatic modes, the single order is sent automatically. It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed send request, with reason codes to give further detail as to the reason for failure. These reason codes could be used to output messages to an appropriate user.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASSDPO01 | Send Purchase Order | |
| Execution Modes | User | 10 | Allowed | ST A2 6510 |
| | Automatic | 20 - 40 | Allowed | ST A2 6511 |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | The purchase order number | |
| | Exit Node | 01 | Order sent | (None) |
| | | 02 | Failed to send order | 01 Order cancelled |
| | | | | 02 Not required to be sent |
| | | | | 03 No lines on order |
| | | | | 04 Supplier does not exist |
| | | 03 | Supplier not in AI so order not sent | (Blank) Supplier not in AI so order not sent |

### Where Used Example

Style Purchase Authorisation: PAS3 Documentation Preparation

## Goods Receiving (3/STPMP)

### Scope

This informs Work Management when goods have been received against a purchase order or container in the Style Goods Receiving activity.

There are two input formats; identifiable by separate activity codes:

- If the input is a purchase order, the purchase order number will be pre-filled on the selection window.

- If the input is a container, the selection by container will be pre-filled on the selection window.

One output node confirms that the purchase order or container has been processed.

The other output node identifies the new Goods Receipt Number that has been raised.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRCPO | Receive Purchased Order | |
| Execution Modes | User | 10 | Allowed | ST A2 3170 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order received | (None) |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | GRN raised | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRCCO | Receive Container | |
| Execution Modes | User | 10 | Allowed | ST A2 3170 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| Output | Document Type | CONTAINER | Container | |

| | | | | |
|---|---|---|---|---|
| | BOD Reference | (20 characters) | Container number | |
| | Exit Node | 01 | Container received | (None) |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | GRN generated | (None) |

### Where Used Example

None

## Importing Shipment (2/STPMI)

### Scope

This informs Work Management when a container has been built in the Style Importing Shipment activity.

There are two input formats; identifiable by separate activity codes:

- If the input is to create a container, there is no default container code.
- If the input is to maintain a container, the container will be pre-filled on the selection window.

The output node identifies the container that has been processed, and the exit node identifies the kind of amendment.

See also the section on Non-Importing Shipment.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRCO | Create Container | |
| Execution Modes | User | 10 | Allowed | ST A2 3632 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| | Exit Node | 01 | Container created | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASENCO | Maintain Container | |
| Execution Modes | User | 10 | Allowed | ST A2 3632 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| Output | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| | Exit Node | 02 | Container dates amended | (None) |
| | | 03 | Container deleted | (None) |

### Where Used Example

None

## Shipment (Non-importing) (8/STPMM)

### Scope

This informs Work Management when a container has been built in the Style Non-importing Shipment activity.

There are two input formats; identifiable by separate activity codes:

- If the input is to create a container, there is no default container code.
- If the input is to maintain a container, the container will be pre-filled on the selection window.

The output node identifies the container that has been processed, and the exit node identifies the kind of amendment.

See also the section on Importing Shipment.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRCO | Create Container | |
| Execution Modes | User | 10 | Allowed | ST A2 3630 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| | Exit Node | 01 | Container created | (None) |

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASENCO | Maintain Container | |
| Execution Modes | User | 10 | Allowed | ST A2 3630 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| Output | Document Type | CONTAINER | Container | |
| | BOD Reference | (20 characters) | Container number | |
| | Exit Node | 02 | Container dates amended | (None) |
| | | 03 | Container deleted | (None) |

## Where Used Example

None

# Print GRNs (4/STPMR)

## Scope

When a GRN number is passed to the Print GRNs activity by Work Management it will print that single goods received note.

- When the execution mode is User Invoked, the purchase order number is automatically completed on the selection window. The user can then select the option to submit the print.
- When executed in any of the Automatic modes, the order is printed automatically. It can also be run in a Multiple Document Processing mode.

It will return exit nodes to indicate either a successful or a failed release request, with reason codes to give further detail as to the reason for failure. The failure reason code includes identification of orders that should not be printed, but should be faxed or sent by EDI. These reason codes could be used to output messages to an appropriate user.

## Constraints

None

### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRGR | Print GRN | |
| Execution Modes | User | 10 | Allowed | ST A2 3400 |
| | Automatic | 20 - 40 | Allowed | ST A2 ??? |
| Input | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| Output | Document Type | GRN | GRN Number | |
| | BOD Reference | (10 characters) | Stockroom, a dash, and a 7-digit goods received note number | |
| | Exit Node | 01 | GRN printed | (None) |
| | | 02 | GRN not printed | 01 GRN already printed |
| | | | | 02 GRN reference not found |

## Where Used Example

None

# Style Requisitioning

## Create Purchase Orders (31/STRQP)

### Scope

For every requisition processed, Work Management is informed of every successful conversion to a Purchase Order, or any failure to turn the requisition into an order.

- When a requisition is successfully processed, the output document type is a purchase order, with an output node to indicate either that a new purchase order has been created, or that an existing purchase order has been updated. In either case, the business object reference is the purchase order number.
- When it fails to convert a requisition to a purchase order, the output document type is the requisition, with a reason code to indicate the reason for failure.

A purchase order created by this activity is distinguished from orders created by purchase order entry by the activity code.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRSPO | Create Purchase Style Order | |
| Execution Modes | User | 10 | Allowed | ST A2 6450 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PURCHORDER | Purchase Order | |
| | BOD Reference | (7 characters) | A purchase order number | |
| | Exit Node | 01 | Order created | (None) |
| | | 02 | Order updated | (None) |
| Output | Document Type | REQUISITN | Requisition | |
| | BOD Reference | (7 digits) | A requisition number | |
| | Exit Node | 01 | Failed to convert requisition | 01 Item error |
| | | | | 02 Supplier error |
| | | | | 03 Vendor error |

| | | | | |
|---|---|---|---|---|
| | | | | 04 Planner error |
| | | | | 05 Authorisation required |
| | | | | 06 Record is locked |

## Where Used Example

Style Purchase Authorisation: PAS1.1 Creation of Orders from Requisitioning

# Style Sales Order Processing

## Transcriptional Order Entry (1/STOEP)

### Scope

This informs Work Management when a new sales order has been created in Style Transcriptional Order Entry, the new sales order number becoming the business object document reference.

### Constraints

The Transcriptional form of order entry uses the same activity code as the Conversational form, so they would be indistinguishable from each other if both were to be present in a process. However, it is a different activity code to that used in the Receive Orders activity in the Application Interface.

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASENSOCN | Enter Sales Order Conversational | |
| Execution Modes | User | 10 | Allowed | ST A2 0131 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | 01 | Sales order created | (None) |

### Where Used Example

None

## Conversational Order Entry (2/STOEP)

### Scope

This informs Work Management when a new sales order has been created in Style Conversational Order Entry, the new sales order number becoming the business object document reference.

### Constraints

The Transcriptional form of order entry uses the same activity code as the Conversational form, so they would be indistinguishable from each other if both were to be present in a process. However, it is a different activity code to that used in the Receive Orders activity in the Application Interface.

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASENSOCN | Enter Sales Order Conversational. | |
| Execution Modes | User | 10 | Allowed | ST A2 0141 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | 01 | Sales order created | (None) |

### Where Used Example

Style Order Fulfilment: OFS 1.1 Order Placement

## Receive Orders (21/STOEAI)

### Scope

This informs Work Management when a new sales order has been created in the Style Application Interface Receive Orders, the new sales order number becoming the business object document reference. It is distinguished from other forms of order entry by the activity code.

### Constraints

The single exit node only identifies the fact that an order has been created; it does not identify the state or content of the order, information that is often required. If that level of detail were to be required you would need to add a separate interrogation activity to a process following this creation of the order.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRCSOED | Receive Sales Order EDI | |
| Execution Modes | User | 10 | Allowed | ST A2 6670 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | A new sales order number | |
| | Exit Node | (Blank) | Order received | |

### Where Used Example

Style Order Fulfilment: OFS1.1 Order Placement

## Order Amend (5/STOEP)

### Scope

This informs Work Management when a sales order has been amended in Style Order Amend; the sales order number is the business object document reference.

### Constraints

There is only one activity for order amendment and it uses this single activity code. It does not distinguish between orders entered in Transcriptional or Conversational format.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASAMSOCN | Amend Sales Order Conversational | |
| Execution Modes | User | 10 | Allowed | ST A2 0181 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Sales order amended | (None) |

### Where Used Example

Style Order Fulfilment: OFS1.2 Order Amendment

# Order Cancellation (4/STOEP)

### Scope

This informs Work Management when either the whole order, or one or more lines on an order, has been cancelled in Style Sales Order Cancellation. There are separate output nodes to distinguish between a whole order and line cancellation; in both cases the output business object document reference is a sales order number.

### Constraints

The output business object does not identify individual order line numbers.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCLSO | Cancel Sales Order | |
| Execution Modes | User | 10 | Allowed | ST A2 0161 |
| | Automatic | 20 - 40 | Not allowed | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Whole order cancelled | (None) |
| | | 02 | Order lines cancelled | (None) |

### Where Used Example

Style Order Fulfilment: OFS 1.2 Order Amendment

# Fast Batch Order Cancellation (6/STOEB)

### Scope

This informs Work Management when an order has been cancelled in Style Batch Sales Order Cancellation. The output node identifies that the order has been cancelled and the output business object document reference is the sales order number.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCLSOB | Cancel Sales Order, Batch | |
| Execution Modes | User | 10 | Allowed | ST A2 1025 |
| | Automatic | 20 - 40 | Allowed | ST A2 1025 |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Order cancelled | (None) |

### Where Used Example

None

## Suspended Order Release (6/STOEP)

### Scope

This accepts an order as input and populates the order number selection window ready so that the user can accept the order for release from suspension. If run in batch mode, it automatically releases that order from suspension.

The exit node indicates that the order has been released.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRLSO | Release Suspended Order | |
| Execution Modes | User | 10 | Allowed | ST A2 0191 |
| | Automatic | 20 - 40 | Allowed | ST A2 0192 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Order released from suspension | (None) |

### Where Used Example

Style Order Fulfilment: OFS1.2 Order Amendment

Style Order Fulfilment: OFS1.3.1 Suspended Order Validation

## Manual Order Allocation (3/STOEP)

### Scope

This informs Work Management when one or more lines on an order have been allocated or de-allocated in Manual Allocation by Order. There is a single output to indicate that there has been a change of allocation status on the order, the business object document reference being the sales order number.

### Constraints

The exit node does not attempt to identify all the possible events that may have occurred within the execution of the activity, such as, allocate one line, de-allocate another, etc.

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASALSOMO | Allocate sales Order; Manual by Order | |
| Execution Modes | User | 10 | Allowed | ST A2 0151 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Allocation status changed | (None) |

### Where Used Example

Style Order Fulfilment: OFS1.2 Order Amendment

## Batch Allocation (1/STOEB)

### Scope

As sales order lines are processed, Work Management is informed of every sales order that has had at least one order line considered for allocation.

There is a single output for each order to indicate that batch allocation has completed normally for the order, the output business object document reference being the sales order number. It does not indicate whether the allocation was successful or not, it merely indicates that the order was due for consideration for allocation, and batch allocation has completed its processing. All orders in this category have an output with the blank exit node.

### Constraints

To identify whether the allocation was successful, or whether the order suspended, etc., this activity will need to be followed by an element to analyse the state of the order.

#### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASALSOB | Allocate Sales Order; Batch | |
| Execution Modes | User | 10 | Allowed | ST A2 1031 |
| | Automatic | 20 - 40 | Allowed | ST A2 1032 |
| Input | (None) | | Initial Activity | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Batch allocation completed normally | |

### Where Used Example

Style Order Fulfilment: OFS1.2 Order Amendment

## Standard Documents (11/STOEB)

### Scope

The Style Standard Documents activity can either print or re-print three kinds of document:

- Acknowledgements
- Pro forma Invoices
- Cancelled Orders

The print and re-print option for each document is recognised by a different activity code, making six in all, so each is defined separately in a business process.

Where it is preceded by an element dealing with a sales order, and Standard Documents activity is launched from an action list, the input document type is that Sales Order number and is pre-filled on the selection screen. Where it is executed in batch by the Work Management Engine it will process the input sales order.

On a successful generation of a print, the Sales Order is identified as successfully printed.

If the activity is unable to print the document, an exit node identifies the sales order with a reason code for the failure.

A table of parameters is listed below for each of the six options.

## Constraints

None

## Acknowledgement Print

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRSOAC | Print Sales Order Acknowledgement | |
| Execution Modes | User | 10 | Allowed | ST A2 0430 |
| | Automatic | 20 - 40 | Allowed | ST A2 0431 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Acknowledgement printed | (None) |
| | | 02 | Failed to print acknowledgement | 01 Acknowledgement not required for this customer |
| | | | | 02 Acknowledgement already printed |

## Where Used Example

Style Order Fulfilment: OFS1.4 Order Acknowledgement

## Acknowledgement Re-print

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRPSOAC | Print Sales Order Acknowledgement | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Acknowledgement printed | (None) |
| | | 02 | Failed to print acknowledgement | 01 Acknowledgement not required for this customer |

All other parameters as above

## Where Used Example

Style Order Fulfilment: OFS1.2.1 Order Re-acknowledgement

## Pro forma Invoice Print

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRINPF | Print Pro forma | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Pro forma printed | (None) |
| | | 02 | Failed to print pro forma | 01 Pro forma already printed |
| | | | | 02 Pro forma not required for customer |

All other parameters as above

## Where Used Example

None

### Pro forma Invoice Re-print

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRPINPF | Re-print Pro forma | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Pro forma printed | (None) |
| | | 02 | Failed to print pro forma | 01 Pro forma not required for customer |

All other parameters as above

### Where Used Example

None

### Cancelled Order Print

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRSOCL | Print Sales Order Cancelled | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Cancelled order printed | (None) |
| | | 02 | Failed to print cancelled order | 01 Cancellation already printed |
| | | | | 02 Cancellation not required for customer |

All other parameters as above

### Where Used Example

None

### Pro forma Invoice Re-print

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASRPSOCL | Re-print Sales Order Cancelled | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |
| | Exit Node | 01 | Cancelled order printed | (None) |
| | | 02 | Failed to print cancelled order | 01 Cancellation not required for customer |

All other parameters as above

### Where Used Example

None

## Picking Notes (12/STOEB)

### Scope

Where the Style Picking Notes activity is run for a sales order known to Work Management, it will output a number of completion details.

Where it is preceded by an element dealing with a sales order, the input document type is that Sales Order number. On a successful generation of a picking note, the Sales Order is identified as successfully processed and a Pick Note completion identifies the pick note created.

If the activity is unable to generate a picking note, an exit node identifies the sales order with a reason code for the failure.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRPN | Print Pick Note | |
| Execution Modes | User | 10 | Allowed | ST A2 0440 |
| | Automatic | 20 - 40 | Allowed | ST A2 0441 |
| Input | Document Type | SALESORDER | Sales Order | |
| | BOD Ref | (7 characters) | Sales order number | |
| Output | Document Type | SALESORDER | Sales Order | |
| | BOD Reference | (7 characters) | Sales order number | |

| | | | | |
|---|---|---|---|---|
| | Exit Node | 01 | Order processed | (None) |
| | | 01 | Failed to create pick note | 01 Pick percentage failure |
| | | | | 02 Order suspended |
| | | | | 03 No stock allocated |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note created | (None) |

### Where Used Example

Style Order Fulfilment: OFS2 Order Delivery

## Pick Note Cancellation (7/STOEP)

### Scope

If the input is supplied from a preceding activity in a process, and Style Pick Note Cancellation is launched from an action list, then the initial window is pre-filled with the pick note number.

On a successful cancellation of a pick note, it will output a completion of the pick note document with the pick note reference.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCLPN | Cancel Pick Note | |
| Execution Modes | User | 10 | Allowed | SL A2 0480 |
| | Automatic | 20 - 40 | Not Applicable | |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note cancelled | (None) |

### Where Used Example

None

## Confirmation of Packing (13/STOEP)

### Scope

This accepts a pick note known to Work Management and returns the completion of packing for the pick note. Alternative exit nodes indicate whether the full or a partial quantity was packed.

If the input is supplied from a preceding activity in a process and Style Confirm Pack launched from an action list, the initial window is pre-filled with the pick note number.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCNPNPA | Confirm Pick Note Pack | |
| Execution Modes | User | 10 | Allowed | ST A2 1050 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Full pack | (None) |
| | | 02 | Partial pack | (None) |

### Where Used Example

Style Order Fulfilment: OFS2 Order Delivery

## Interactive Confirm Despatch (8/STOEP)

### Scope

This accepts a pick note known to Work Management and returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the input is supplied from a preceding activity in a process and Confirmation of Despatch launched from an action list, the initial window is pre-filled with the pick note number.

There is a similar activity for despatches from a warehouse controlled-stockroom. See the section on **Confirm Despatch (8/STWHP)** for further details.

Fast Batch confirmation of despatch is similarly enabled. See the section on **Confirmation of Despatch (24/STOEB)** for further details.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCNPNDS | Confirm Pick Note Despatch | |
| Execution Modes | User | 10 | Allowed | ST A2 0100 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick Note Despatched | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | 01 | Invoice generated | (None) |
| | | 02 | Consolidated invoice generated | (None) |

### Where Used Example

Style Order Fulfilment: OFS2 Order Delivery

## Fast Batch Confirm Despatch (24/STOEB)

### Scope

For each pick note added to the Style Fast Batch list, Work Management is informed of the pick note logged ready for despatch.

The subsequent run of Style Batch Confirm despatch will complete each of these request pick notes. See the section on **Confirm Despatch Processing (4/STOEB)** for further details.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCNPNDF | Confirm Pick Note Despatched Fast | |
| Execution Modes | User | 10 | Allowed | ST A2 0110 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note logged for despatch | (None) |

### Where Used Example

None

## Confirmation Despatch Processing (4/STOEB)

### Scope

As it processes each requested pick note on the Fast Batch list, this informs Work Management that the despatch has been processed and invoiced.

If the confirmation is successful, it returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the confirmation is not successful, it returns a different exit node together with a reason code to identify the reason why the despatch cannot be confirmed.

There is a similar activity for despatches from a warehouse controlled-stockroom. See the section on **Confirm Despatch (8/STWHP)** for further details.

Interactive confirmation of despatch is similarly enabled. See the section on **Confirmation of Despatch (8/STOEP)** for further details.

### Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| Activity Code | | JBASCNPNDB | Confirm Pick Note Despatched Batch | |
| Execution Modes | User | 10 | Allowed | ST A2 0520 |
| | Automatic | 20 - 40 | Allowed | ??? |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note despatched | |
| | | 02 | Failed confirm despatch | 01 Unable to despatch |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | 01 | Invoice generated | |
| | | 02 | Consolidated invoice generated | (None) |

### Where Used Example

None

## Invoices and Credit Note Print (14/STOEB)

### Scope

The Style Invoice and Credit Note print activity can identify both invoices and credit notes known to Work Management and output a number of completion details.

To identify whether the document being processed is an invoice or a credit note, there are separate activity codes with their own document types. It is assumed that these activities would be separate elements in a process. The input document reference is therefore an invoice or credit note number.

On the successful printing and posting of a document, the Invoice or Credit note is identified as successfully printed

If the activity is unable to print the document, an exit node identifies the document with a reason code for the failure.

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASPRIN | Print Invoice | |
| Execution Modes | User | 10 | Allowed | ST A2 0450 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | INVOICE | Invoice | |
| | BOD Ref | (7 characters) | Invoice number | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | 01 | Invoice printed and posted | (None) |
| | | 02 | Failed invoice print/post | 01 EDI invoice |
| | | | | 02 Export invoice |
| | | | | 03 Reference already used |
| | | | | 04 Held for pricing |
| | | | | 05 Already posted |
| | | | | 06 Not despatched |
| | | 03 | Dummy invoice consolidated | (None) |
| | | 04 | Consolidated invoice created | (None) |
| | | 05 | Failed print/ post of consolidated invoice | 01 EDI invoice |
| | | | | 02 Export invoice |
| | | | | 03 Reference already used |

## Where Used Example

Style Order Fulfilment: OFS3 Order Invoicing

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
| --- | --- | --- | --- | --- |
| Activity Code | | JBASPRCN | Print Credit Note | |
| Execution Modes | User | 10 | Allowed | ST A2 0450 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | CREDITNOTE | Credit Note | |
| | BOD Ref | (7 characters) | Credit note number | |
| Output | Document Type | CREDITNOTE | Credit Note | |
| | BOD Reference | (7 characters) | Credit note number | |
| | Exit Node | 01 | Credit note printed | (None) |
| | | 02 | Failed credit note print | 01 EDI credit note |
| | | | | 04 Held for Pricing |

### Where Used Example

None

# Style Warehousing

## Confirm Pick (7/STWHP)

### Scope

This accepts a pick list known to Work Management. Where Confirm Pick launched from a Workspace action list, the initial window is pre-filled with the pick list number.

Where all lines are confirmed as picked, the exit node indicates full pick confirmed. This might then be used to drive the confirmation of despatch processing.

Where there are one or more lines not fully picked, an alternative exit node indicates a partial pick confirmed. This might be used to drive a reminder before the despatch is confirmed.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCNPK | Confirm Pick | |
| Execution Modes | User | 10 | Allowed | ST A2 5141 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | ACTIONLIST | Action List | |
| | BOD Ref | (8 digits) | Action list number | |
| Output | Document Type | ACTIONLIST | Action List | |
| | BOD Reference | (8 digits) | Action list number | |
| | Exit Node | 01 | Full pick confirmed | (None) |
| | | 02 | Partial pick confirmed | (None) |

### Where Used Example

Style Order Fulfilment: OFS2.1 Warehousing Pick Cycle

# Confirm Despatch (8/STWHP)

## Scope

This accepts a pick note known to Work Management and returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the input is supplied from a preceding activity in a process and Warehousing Confirmation of Despatch launched from an action list, the initial window is pre-filled with the pick note number.

There is a similar activity for despatches from a non-warehouse-controlled stockroom. See the sections on **Confirmation of Despatch (8/STOEP)** and **Confirmation of Despatch (24/STOEB)** for further details.

## Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCNDSPW | Confirm Despatch Warehousing | |
| Execution Modes | User | 10 | Allowed | ST A2 5142 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order plus pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note despatched | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | 01 | Invoice generated | (None) |
| | | 02 | Consolidated invoice generated | (None) |

## Where Used Example

Style Order Fulfilment: OFS2.1 Warehousing Pick Cycle

# Pick Lists for Sales (22/STWHP)

## Scope

This accepts a pick note number from Style Sales Order Processing where it is known to Work Management. Where Pick List for Sales is launched from a Workspace action list, the selection window is pre-filled with the sales order number.

There are always two output nodes.

The pick note is output so that the subsequent process can deal with the pick note, perhaps to check if the complete pick note has been committed.

The other exit node is the generated warehouse pick list (an Action List).

## Constraints

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBASCRPL | Create Pick List | |
| Execution Modes | User | 10 | Allowed | ST A2 5149 |
| | Automatic | 20 - 40 | Not possible | |
| Input | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Ref | (10 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTEST | Style Pick Note | |
| | BOD Reference | (10 characters) | A sales order and pick note sequence | |
| | Exit Node | 01 | Pick note processed | |
| Output | Document Type | ACTIONLIST | Action List | |
| | BOD Reference | (8 digits) | Action list number | |
| | Exit Node | 01 | Action list created | |

## Where Used Example

Style Order Fulfilment: OFS2.1 Warehousing Pick Cycle

# Vendor Scheduling

## Vendor Sourcing (1/VSP)

### Scope

This informs Work Management when the Vendor Sourcing activity is run.

If the run detects either vendor contract or vendor schedule exceptions, it outputs exception nodes for all those contracts or schedules in error.

- For contract errors, the business object document is a Vendor Contract, with the contract number being the document reference.
- For schedule errors, the business object reference is a Vendor Schedule, with the document reference a combination of contract, stockroom and item.

These outputs could be routed to appropriate personnel for action.

Where no exception messages are produced, there is an output node of Vendor Schedule Run, with the run date and time being the document reference. This could be used to drive the schedule release.

### Constraints

The schedule exceptions output does not identify different kinds of exception; it is assumed that the user will refer to the printed report produced by the Vendor Schedule run.

#### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCRVS | Create Vendor Schedule | |
| Execution Modes | User | 10 | Allowed | VS A2 0460 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | (None) | | Initial Activity | |
| Output | Document Type | VSCONTRACT | Vendor Contract | |
| | BOD Reference | (7 characters) | Contract number | |
| | Exit Node | 01 | Vendor contract unauthorised | (None) |
| Output | Document Type | VENDSCHED | Vendor Schedule | |
| | BOD Reference | (18 characters) | Contract, dash, Stockroom, dash, Item | |

| | | | | |
|---|---|---|---|---|
| | Exit Node | 01 | Vendor schedule exception | (None) |
| Output | Document Type | VSRUN | Vendor Schedule Run | |
| | BOD Reference | (14 characters) | CYYMMDD, dash, HHMMSS | |
| | Exit Node | 01 | No VS exceptions | (None) |

### Where Used Example

Vendor Schedule Exceptions: VSE Vendor Schedule Exceptions

# Warehousing

## Confirm Pick (7/WHP)

### Scope

This accepts a pick list known to Work Management. Where Confirm Pick launched from a Workspace action list, the initial window is pre-filled with the pick list number.

Where all lines are confirmed as picked, the exit node indicates full pick confirmed. This might then be used to drive the confirmation of despatch processing.

Where there are one or more lines not fully picked, an alternative exit node indicates a partial pick confirmed. This might be used to drive a reminder before the dispatch is confirmed.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCNPK | Confirm Pick | |
| Execution Modes | User | 10 | Allowed | WH A2 2050 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | ACTIONLIST | Action List | |
| | BOD Ref | (8 digits) | Action list number | |
| Output | Document Type | ACTIONLIST | Action List | |
| | BOD Reference | (8 digits) | Action list number | |
| | Exit Node | (Blank) | Full pick confirmed | (None) |
| | | 01 | Partial pick confirmed | (None) |

### Where Used Example

Order Fulfilment: OF2.1 Warehousing Pick Cycle

# Confirm Despatch (8/WHP)

## Scope

This accepts a pick note known to Work Management and returns both the completion of the pick note and the generation of an invoice. Discrete and Consolidated invoices are identified by alternative exit nodes.

If the input is supplied from a preceding activity in a process and Warehousing Confirmation of Despatch launched from an action list, the initial window is pre-filled with the pick note number.

There is a similar activity for despatches from a non-warehouse-controlled stockroom. See the sections on **Interactive Confirm Despatch (10/OEP)** and **Invoices/Credit Notes (4/OER)** for further details.

## Constraints

None

### Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCNDSPW | Confirm Despatch Warehousing | |
| Execution Modes | User | 10 | Allowed | WH A2 2060 |
| | Automatic | 20 - 40 | Not applicable | |
| Input | Document Type | PICKNOTE | Pick Note | |
| | BOD Ref | (9 characters) | A sales order plus pick note sequence | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank ) | Pick note despatched | (None) |
| Output | Document Type | INVOICE | Sales Invoice | |
| | BOD Reference | (7 characters) | An invoice number | |
| | Exit Node | (Blank ) | Invoice generated | (None) |
| | | 01 | Consolidated invoice generated or updated | (None) |

## Where Used Example

Order Fulfilment: OF2.1 Warehousing Pick Cycle

Enterprise Orders: EO2 Order Delivery

# Pick Lists for Sales (22/WHP)

## Scope

This accepts a pick note number from Sales Order Processing where it is known to Work Management. Where Pick List for Sales is launched from a Workspace action list, the selection window is pre-filled with the sales order number.

There are always two output nodes.

The pick note is output so that the subsequent process can deal with the pick note, perhaps to check if the complete pick note has been committed.

The other exit node is the generated warehouse pick list (an Action List).

## Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | JBAGCRPL | Create Pick List | |
| Execution Modes | User | 10 | Allowed | WH A2 2220 |
| | Automatic | 20 - 40 | Not possible | |
| Input | Document Type | PICKNOTE | Pick Note | |
| | BOD Ref | (9 characters) | A sales order and pick note sequence | |
| Output | Document Type | PICKNOTE | Pick Note | |
| | BOD Reference | (9 characters) | A sales order and pick note sequence | |
| | Exit Node | (Blank) | Pick note after creation of action list(s) | |
| Output | Document Type | ACTIONLIST | Action List | |
| | BOD Reference | (8 digits) | Action list number | |
| | Exit Node | (Blank) | Action list created | |

## Where Used Example

Order Fulfilment: OF2.1 Warehousing Pick Cycle

# World Trade

## Export Invoice Update (41/WTP)

### Scope

This informs Work Management when a System21 invoice has been updated with SPEX invoice details in the Export Invoice Update activity, the invoice number becoming the business object document reference.

Exit nodes indicate whether an invoice succeeded or failed its export update. After a successful export update, the System21 invoice is complete and available for posting to the remaining System21 applications.

### Constraints

None

Work Management Parameters

| Section | Parameter | Codes | Description | Tasks/Reasons |
|---|---|---|---|---|
| Activity Code | | WTPSTINV | World Trade Post Invoice | |
| Execution Modes | User | 10 | Allowed | WT A2 0130 |
| | Automatic | 20 - 40 | Allowed | WT A2 0130 |
| Input | (None) | | Initial Activity | |
| Output | Document Type | INVOICE | Invoice | |
| | BOD Reference | (7 characters) | Invoice number | |
| | Exit Node | (Blank) | Posting succeeded | (None) |
| | | 01 | Posting failed | (None) |

### Where Used Example

Enterprise Orders: EO3 Invoicing

# Glossary

## AM

Acronym for Application Manager

## APPC Network

IBM acronym for Advanced Peer-to-Peer Communications

## Application

In System Manager this refers to a group of related modules. For example the Financials application includes modules for General Ledger, Accounts Receivable and Cash Management. Third party applications can refer to any software package.

## Application Manager

This is designed for the easy management of applications. It sits between the iSeries 400 system and the applications it manages, providing a route into them for the user. It can also be used to control bespoke and third party functional areas and to design bespoke menus.

## APPN Network

IBM term for Advanced Peer-to-Peer Networking

## Drop-through Rules

The drop-through rules govern which versions of menus, tasks and library lists. Application Manager will try to use for a given request according to the environment (whether default or non-default). See the section Environment Usage for further details. See also the Display Menu/ Task Process (Step-by-Step) Enquiry, in particular the Thought Process Window, as these enquiry screens demonstrate the drop-through rules.

## EDI

Acronym for Electronic Data Interchange

## Electronic Data Interchange

A method of transmitting business information over a network, between trading partners. The partners must agree to follow approved national or industry standards for translating and exchanging information.

# E/D Processor

Escalation and Delegation of Schedule Rules as configured in Active Modeler

# GOB

# HK

Acronym for House Keeping

# House Keeping

This is designed to manage libraries by recording details such as frequency of use, sizes, owners and dates last changed or saved. It can also perform unattended saves as an overnight job.

# IPG

Acronym for Interactive Program Generator

This is a programming language used to write interactive programs which interface with RPG programs.

# IPL

Acronym for Initial Program Load

This is the iSeries 400 equivalent of boot up on a PC.

# Job Status

The job statuses in Machine Manager are:

A - Active

E - Completed

J - Submitted

S - Started

W - Waiting

X - Warning

Refer also to Task Status.

# Job Types

These are often reported as a one-character code:

E - Auto Day-End Job

I - Initiator

J - Job Scheduler

P - Power Down

S - Auto Day-Start Job

Where the job type has two characters, the second character indicates the current status of the job.

## LDA

Acronym for Local Data Area

Application Manager uses the Local Data Area (LDA) to pass information between programs. The first 256 characters of the 1024 character LDA are fixed and pre-defined. The remainder of the Local Data Area is specifically for application usage. You must make sure that your applications never change the first 256 characters of the Local Data Area.

> Note: The exception to this rule is the return code L#RTCD positions 118 to 119 of the Local Data Area. If you are changing the return code then you save the LDA before you execute your routine and restore it back when your routine has completed.

## Log Entry Types

Major Log Types are:

Blank - All Types

S - Auto-Day Start Jobs

I - End-Day Initiator Jobs

E - Auto-Day End Jobs

P - Power Down Jobs

Minor Log Types are:

EE - Auto Day-End Jobs Completed

ES - Auto Day-End Jobs Started

EZ - Authority Violation

IA - Day-End Initiator Activated

IC - Day-End Changed

IJ - Day-End Initiator Submitted

IW - Day-End Initiator Waiting

IX - Day-End Initiator Warning

JJ - Job Scheduler Submitted

JP - Job Scheduler Processing

PE - Power Down System Ended

PJ - Power Down System Submitted

PS - Power Down System Started

PW - Power Down Wait

PX - Power Down Time Limit Passed

SE - Auto Day-Start Jobs Completed

SS - Auto Day-Start Jobs Started

SZ - Authority Violation

## Machine Manager

This is designed to provide automatic management of daytime and night-time operating environments, where daytime processing is mainly interactive and night-time processing is mainly batch. The interface between the two operating environments is controlled through scheduled day-start and day-end jobs.

## MM

Acronym for Machine Manager

## Module

This is the name given to the constituent parts of an application. For example, General Ledger, Accounts Payable and Accounts Receivable are all modules of the Financials application.

## Network Manager

This is designed as a user-friendly interface for configuring and maintaining the network. It uses SNADS (System Network Architecture Distribution Services), the IBM SNA distribution service, to distribute objects and messages between systems on the network. These systems can be linked directly or indirectly.

## QSECOFR

This is the sign-on for the security officer. It gives you super-user status when entering commands on the command line in System Manager.

## Role

A role represents a job title to which certain tasks are assigned. For example, a Sales Order Clerk could be assigned the tasks of Sales Order Entry and Customer Order Enquiry.

## SAA Standards

IBM acronym for System Application Architecture Standards

## SNADS

IBM acronym for System Network Architecture Distribution Services

## Source

The application source codes

For example, use U for your own applications in Administration Management.

## Task Status

The completion status of the task last time it was executed

RS - Ran Successfully

RN - Never Run

RF - Run Failed

SS - Submitted Successfully