



# System i Workspace v2015

## Product Guide

### **Important Notices**

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

### **Trademark Acknowledgements**

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

### **Publication Information**

Release: System i Workspace v2015

Publication date: June 23, 2022

---

---

# Contents

<b>About this guide</b>	<b>7</b>
Intended audience	7
Contacting Infor	7
<b>Chapter 1 Getting started</b>	<b>9</b>
Introduction	9
Browser support	9
Using System i Workspace	10
Starting System i Workspace	10
The Sign In Form	11
Fields	11
The System i Workspace interface	15
The header	15
Company menu	15
The Sign Out button	16
Context menus	17
Multi-tabbed interface	18
The System i Home tab	20
The System i Workspace Home zone	21
User details	21
Maintain Password Dialog	22
Change session properties dialog	23
Your User Image	24
My Recent Tasks	26
Quick Launch	26
Recent Tasks List	29
Scrollable zones	30
General zone features	30
The My Tasks zone	31

The My Favorites zone .....	33
The Task Search zone .....	36
The My Notes zone .....	39
Advanced usage .....	39
Add to favorites icon .....	39
Additional tab information .....	41
System i Workspace settings .....	41
Launching a task .....	45
Basic overview .....	45
<b>Chapter 2 Using the System i Emulator .....</b>	<b>49</b>
Overview .....	49
Installing the System i Emulator .....	49
Basic overview .....	54
Task header .....	55
Toolbar .....	56
Fields .....	57
Command buttons .....	57
Popup windows .....	58
Message windows .....	58
Context menu .....	59
Selecting, copying and pasting text .....	60
Using a proportional font .....	60
Using a monospaced font .....	62
In-panel navigation .....	65
Command buttons .....	66
The edit control .....	67
Emulator preferences .....	70
User options tab .....	71
UI settings .....	71
Printing .....	74
Advanced options tab .....	74
Preferences dialog buttons .....	74
Additional designer controls .....	75
Date control .....	75
Prompt button .....	76
Checkbox control .....	76

---

Dropdown list control .....	76
Custom buttons .....	77
Exportable table data.....	78
Utilities.....	83
My Notes.....	83
My Recent Tasks.....	85
My Favourites .....	85
Screen Shot Viewer.....	86
Application help.....	88
<b>Chapter 3 Using the WFi interface .....</b>	<b>91</b>
Introduction .....	91
Outstanding actions .....	92
The action list.....	94
Action list data .....	94
Action list commands.....	96
Launching other queries.....	96
Customizing action tracker queries .....	98
Manual activities .....	100
Attachments.....	101
<b>Chapter 4 Keyboard shortcuts .....</b>	<b>103</b>
Keyboard shortcuts within System i Workspace .....	103
<b>Chapter 5 Substitution parameters.....</b>	<b>105</b>
Available substitution parameters.....	105



---

## About this guide

This guide details how to use the graphical user interface when launching System i application tasks through System i Workspace.

## Intended audience

This guide is intended for all users of Infor System i Enterprise Resource Planning (ERP) applications including Anael, LX, System21 and XA.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

Updates to the product documentation and product fixes (PTFs) can be found on the Infor Xtreme website under Knowledge Base article 1648078:

<https://www.inforxtreme.com/espublic/EN/AnswerLinkDotNet/SoHo/Solutions/SoHoViewSolution.aspx?SolutionID=1648078>

We recommend that you subscribe to this solution, so that you can be informed automatically of any changes.

If you have comments about Infor documentation, contact [documentation@infor.com](mailto:documentation@infor.com).





## Introduction

System i Workspace is a user interface for launching System i application tasks through a web browser. It provides an intuitive way for users to navigate through the System Manager Menu structure and to launch tasks that can display screens either using a graphical or an emulator look and feel.

**Note:** System Manager is Infor's System i based task/menu/role management and authorization tool. Your System Administrator will use this tool to define the tasks/menus/roles that you are able to access within System i Workspace.

System i Workspace also provides an interface into WFi (formerly known as process.connect), if it has been activated on the host server. This provides the user with information about their pending Action List actions and a wide assortment of Action Tracker queries through which to view them.

## Browser support

Currently, users can only use Microsoft Internet Explorer, Microsoft Edge or Google Chrome on Microsoft Windows to launch System i Workspace.

If you wish to install and use the System i Emulator to display IBM i tasks and commands within System i Workspace, then only Microsoft's Internet Explorer or Microsoft Edge (via the "Internet Explorer Mode") browsers can be used.

**Caution:** Speak to your System Administrator to confirm which versions of Microsoft Internet Explorer, Microsoft Edge and/or Google Chrome are supported by this version of System i Workspace.

Your browser must be configured according to the client settings as described in the Installation and Administration Guide. This is very important for correct operation of System i Workspace.

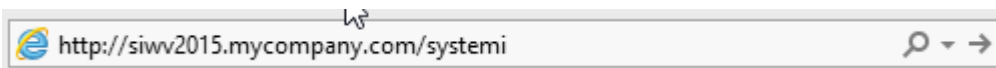
# Using System i Workspace

## Starting System i Workspace

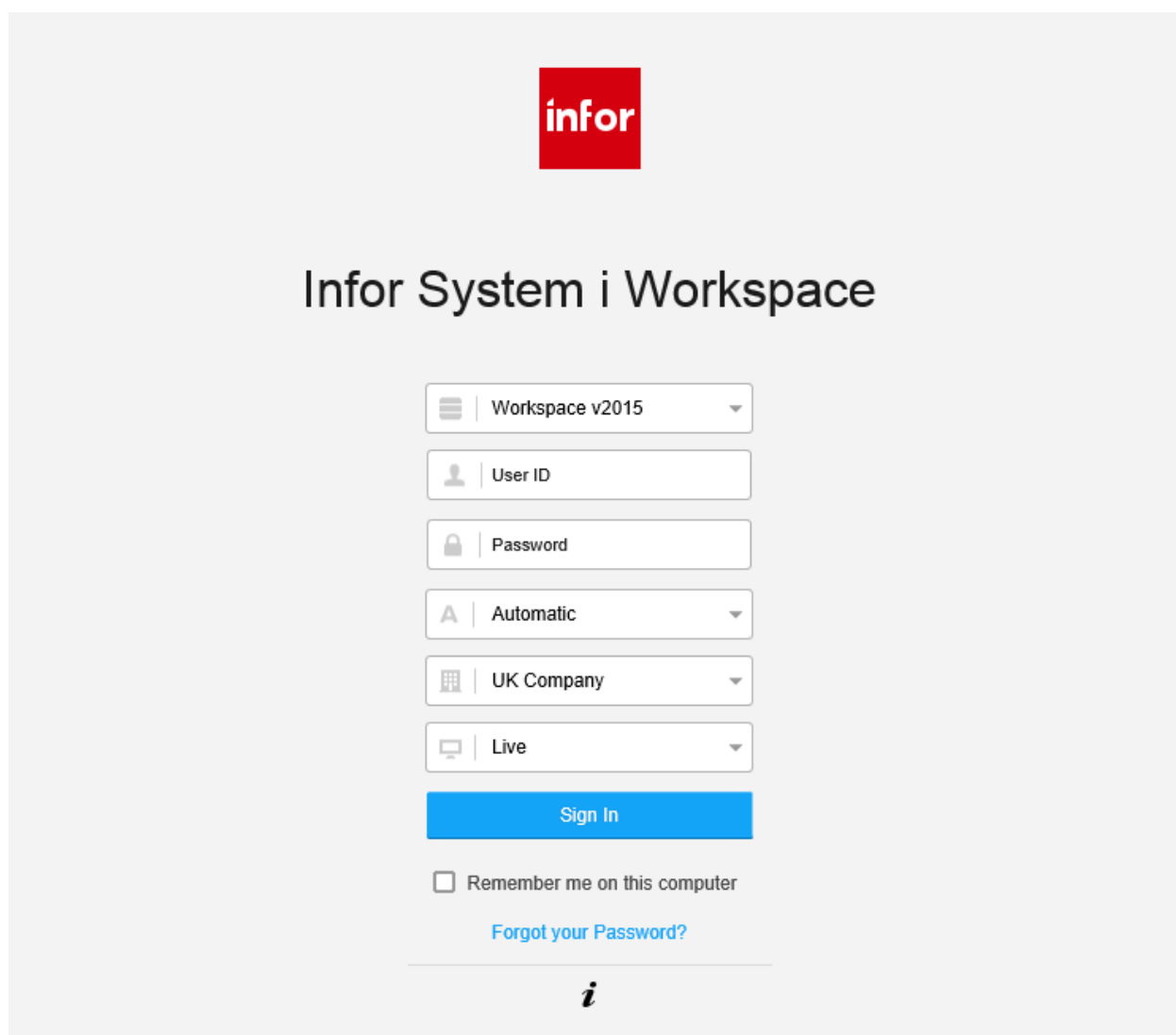
System i Workspace is a web application accessed using Internet Explorer, Microsoft Edge or Google Chrome.

You will need to know the web address (URL) for System i Workspace, or it may already be set up as one of your Favorites. Your System Administrator will have the details you need.

Type the web address into the Internet Explorer/Microsoft Edge/Google Chrome address bar, for example:



## The Sign In Form



The image shows the Infor System i Workspace sign-in interface. At the top is the Infor logo, a red square with the word 'infor' in white. Below the logo is the title 'Infor System i Workspace'. The sign-in form consists of several fields: a dropdown menu for 'Workspace v2015', a text field for 'User ID', a text field for 'Password', a dropdown menu for 'Automatic', a dropdown menu for 'UK Company', and a dropdown menu for 'Live'. Below these fields is a blue 'Sign In' button. Under the button is a checkbox labeled 'Remember me on this computer' and a link that says 'Forgot your Password?'. At the bottom of the form is a small 'i' icon.

### Fields

All fields are mandatory. The fields are described below, in descending order, along with their appropriate icon.

**Caution:** Some of the fields shown above may not be available dependent on how your System Administrator has configured System i Workspace.

## **Profile**

Choose your desired System i Workspace profile.

In System i Workspace, a profile is a grouping of settings and configuration data chosen by your Systems administrator.

If your System Administrator has only configured one profile, this field will be hidden. However, if more than one profile is available you will need to choose the one you wish to use. The descriptions on the profiles have been chosen by your System Administrator and should reflect the different configurations which your company requires.

## **User**

Enter your System i username.

## **Password**

Enter your System i password.

## **Language**

Choose the language which you want System i Workspace to use for all its text and message dialogs.

The default value is **Automatic**, which means that System i Workspace will choose the language automatically, based on the language defined within System Manager for your System i user profile.

By default, this field is hidden and the System Manager language setting is used.

## **Company**

Choose the company which will be used for launching all your System i ERP application tasks.

The ability to select a company is optional and your System Administrator may have chosen to restrict this function, in which case this field may be disabled or may only contain a limited set of companies.

Note that some profile configurations may be setup to completely hide/remove this field from the sign in form.

## **Environment**

Choose the environment which will be used for launching all your System i ERP application tasks.

The ability to select an environment is optional and your System Administrator may have chosen to restrict this function, in which case this field may be disabled or may only contain a limited set of environments.

## **Remember Me on This Computer**

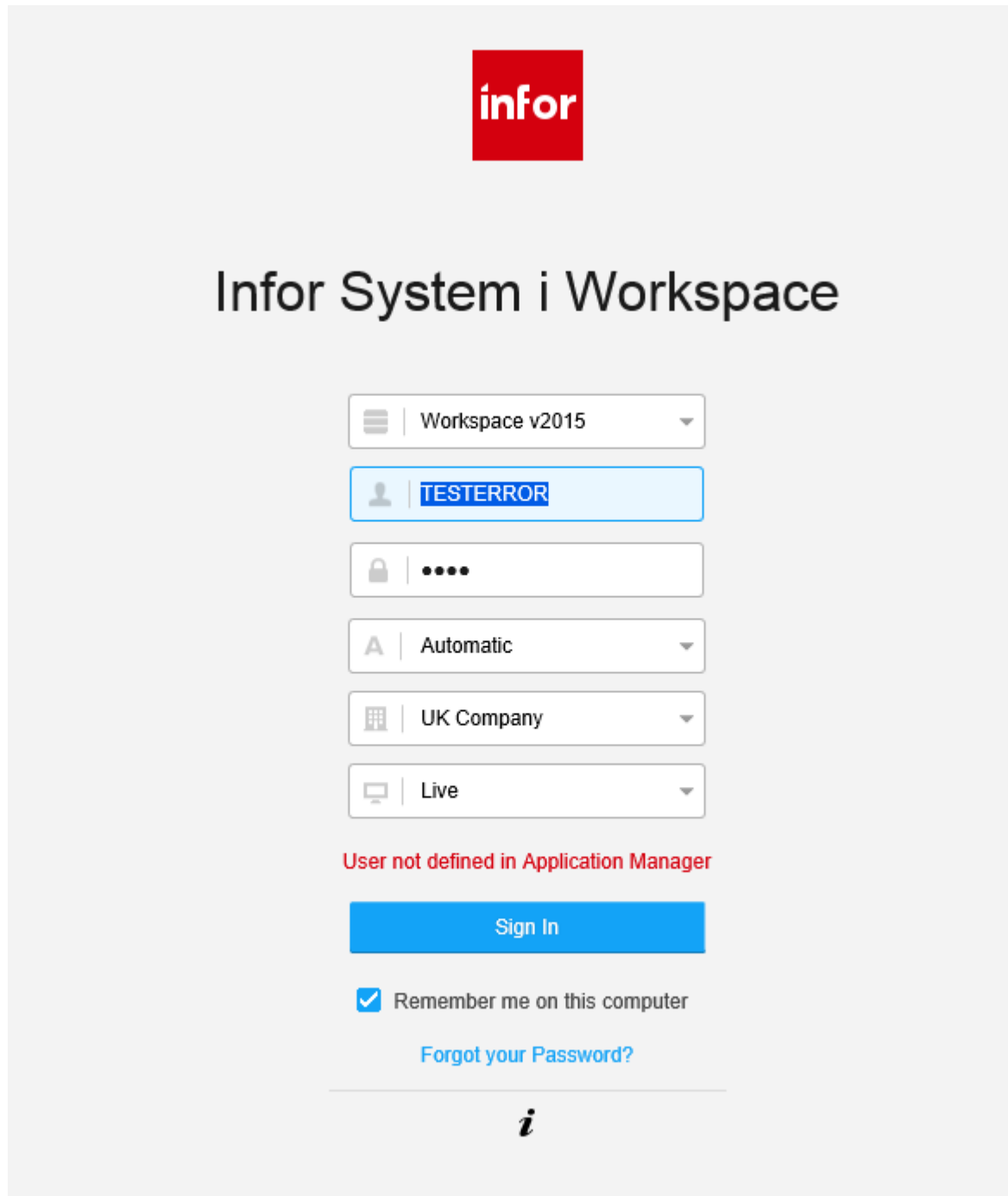
Check this field if you want your System i username to be stored in a cookie and re-used next time you sign in to System i Workspace.

## **Forgot Your Password?**

Click this link to open a password recovery system. This option will not be available if your System Administrator has not assigned a password recovery system within System i Workspace.

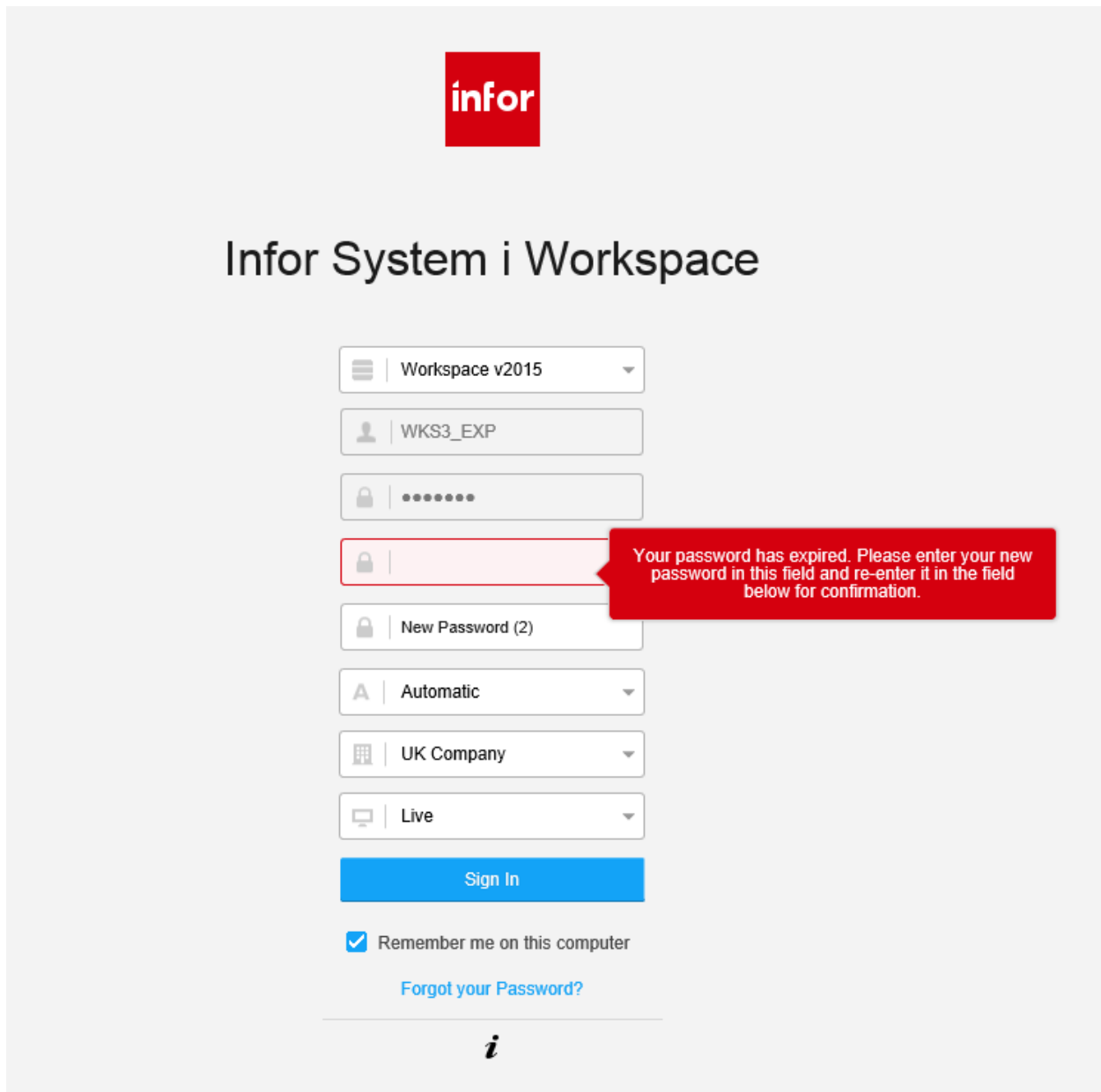
Once the sign on information has been entered, click on the *Sign In* button or press **Enter** to proceed.

If you enter an invalid user id or password, a message will be displayed above the Sign In button, for example:



The screenshot displays the Infor System i Workspace login interface. At the top is the Infor logo. Below it is the title "Infor System i Workspace". The login form consists of several fields: a workspace selector set to "Workspace v2015", a user ID field containing "TESTERROR" (highlighted in blue), a password field with masked characters, and three environment selectors set to "Automatic", "UK Company", and "Live". Below these fields, a red error message states "User not defined in Application Manager". A blue "Sign In" button is positioned below the error message. Underneath the button is a checked checkbox labeled "Remember me on this computer" and a blue link for "Forgot your Password?". At the bottom of the form is a small Infor logo.

If your password has expired, you will be given the opportunity to change it. A new password will need to be entered twice (for confirmation purposes), for example:

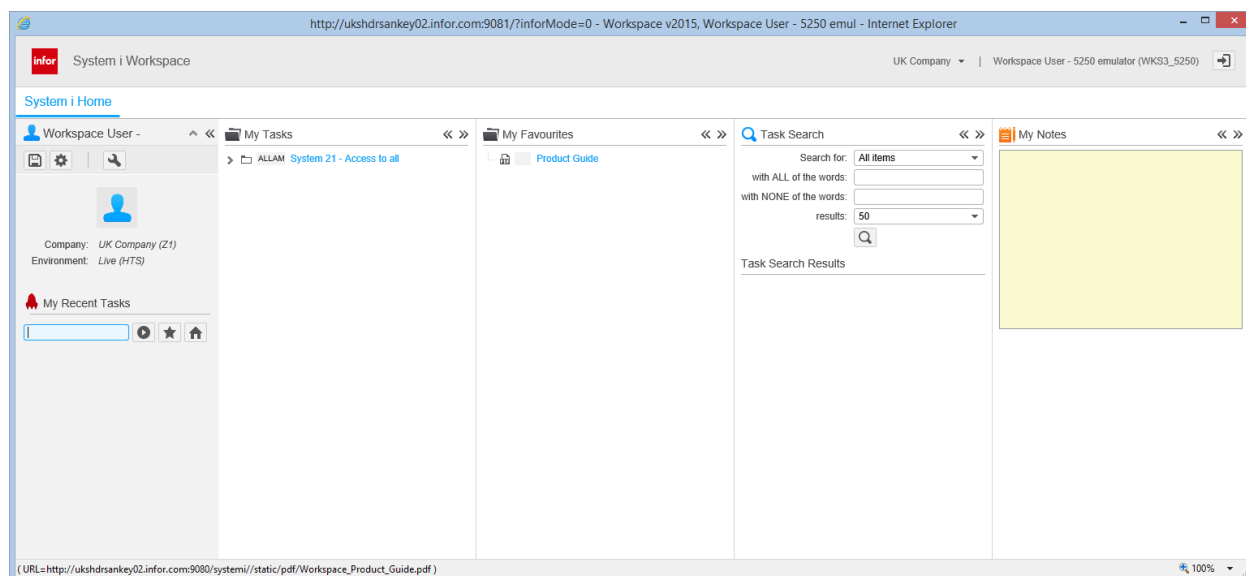


The screenshot displays the Infor System i Workspace login interface. At the top is the Infor logo. Below it, the title "Infor System i Workspace" is centered. The login form consists of several fields: a workspace selector (currently "Workspace v2015"), a user ID field (containing "WKS3\_EXP"), a password field (masked with dots), a new password field (highlighted in red), a confirmation password field (labeled "New Password (2)"), and three dropdown menus for "Automatic", "UK Company", and "Live". A red error message box points to the new password field, stating: "Your password has expired. Please enter your new password in this field and re-enter it in the field below for confirmation." Below the fields is a blue "Sign In" button, a checkbox for "Remember me on this computer", and a link for "Forgot your Password?". The Infor logo is at the bottom.

Once the password has been successfully changed, System i Workspace will sign in as normal.

**Caution:** When using System i Workspace, you will receive the similar error messages and be subject to the same password security (such as disabling accounts after too many sign in attempts) as you experience when logging onto your System i.

# The System i Workspace interface

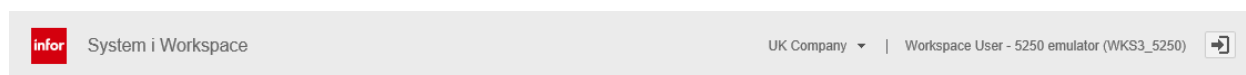


The normal System i Workspace window is best viewed maximized so that it occupies all of your screen area.

The Interface consists of a Header and a Multi-Tabbed Interface.

## The header

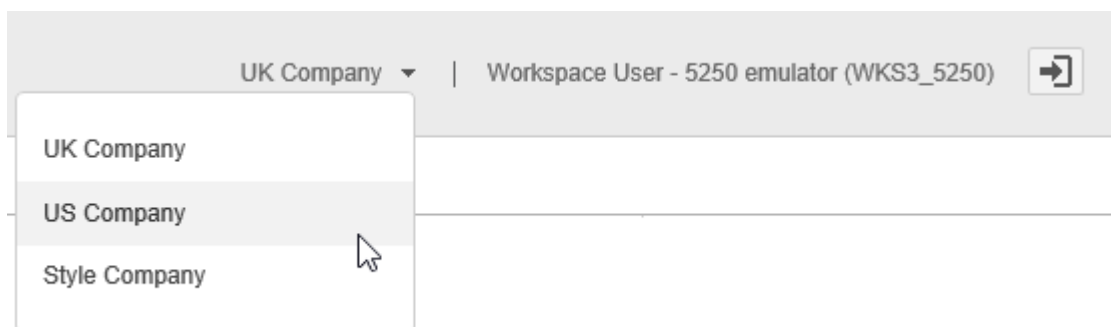
The Header is located at the top of the display.



A dropdown menu is optionally available on the right-hand side of the Header; called the Company Menu (if enabled by the administrator). Click on the text to the left of the vertical bar, or use the dropdown arrow, to display the options under the menu.

## Company menu

This drop-down allows you to change your current System i company.




The drop-down list contains all the available companies for the current System i Workspace profile.

**Caution:** The visibility of this menu and content of this list is configured by your System Administrator.

Upon selecting a new value, the Header will change to reflect the new company (the System i Home Tab will also be updated, see below) and all future task launches will use the new company.

## The Sign Out button

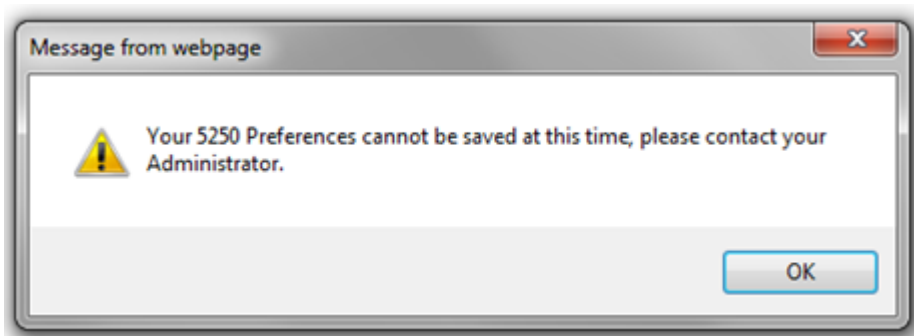
Use the  button to sign out and close the System i Workspace window.

Prior to Sign Out, System i Workspace will attempt to save any changes to your Favorites, preferences or settings.


**Caution:** Never use the normal Internet Explorer/Microsoft Edge/Google Chrome Browser close button to exit from System i Workspace as this may leave record-locks on your System i applications which could prevent other users from accessing those objects

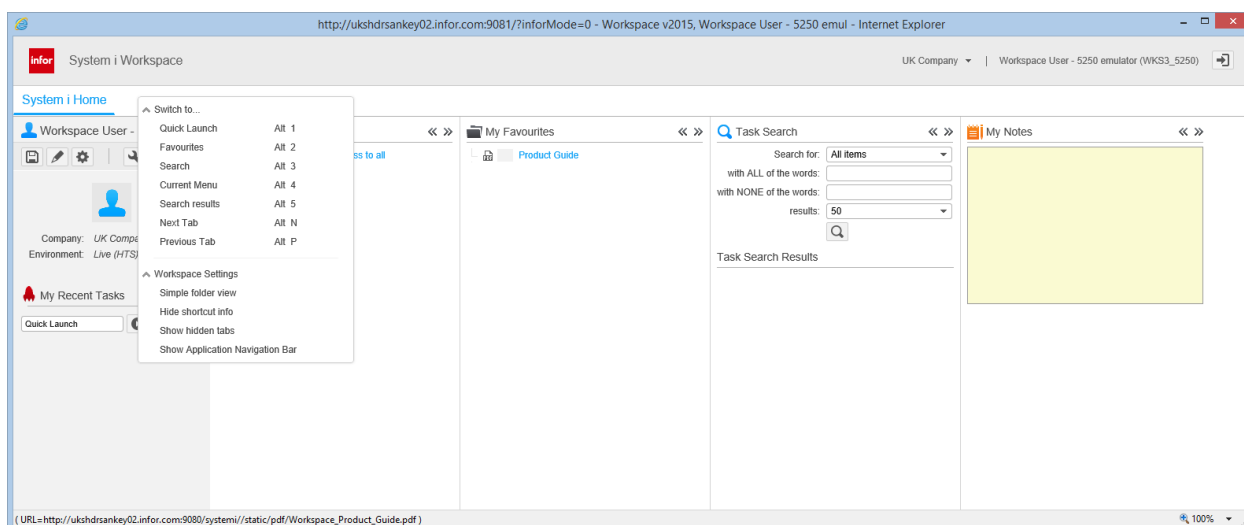
**Caution:** When saving your 5250 preferences, there may be times when the following dialog is displayed. This may be due to the Administrator changing your 5250 Preferences while you are Signed In.

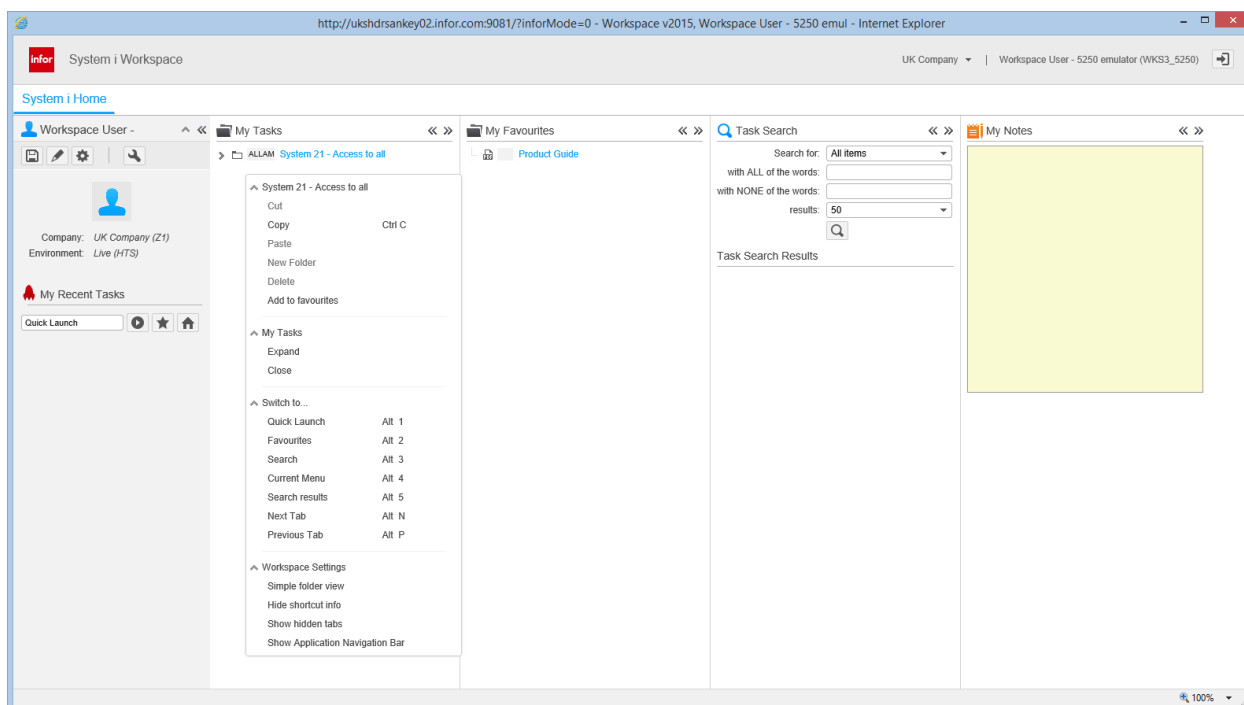




## Context menus

A context menu is available in System i Workspace and is activated either by right-clicking with the mouse or by pressing the Context Menu key  on the keyboard. Remember that the menu is context sensitive, which means that you will see different options depending on where you click on the screen.





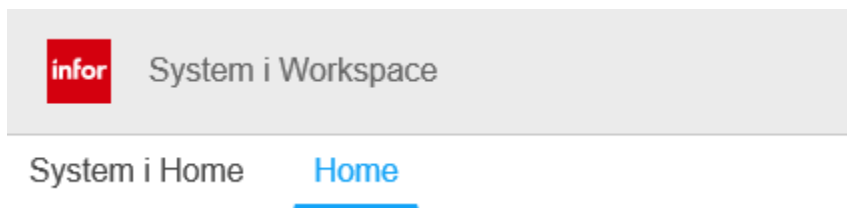
Options in a context menu appear in groups. Depending on where you click on the screen, different groups will appear.

If a keyboard shortcut exists for a particular option, it will be shown on the right-hand side of the menu.

## Multi-tabbed interface

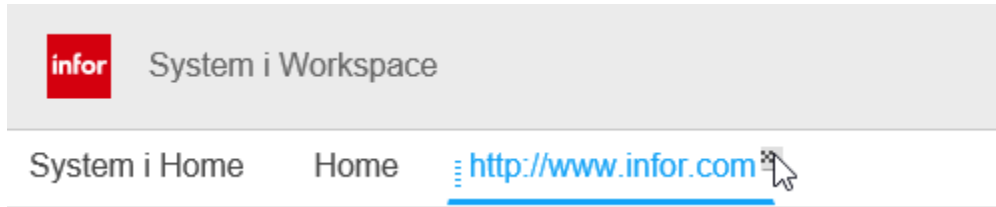
The System i Workspace interface consists of one or more tabs, which can contain System i tasks or web pages.

Initially, you will see a System i Home tab (which is described in the next section) and possibly a Home tab (if your System Administrator has configured one for your organization).



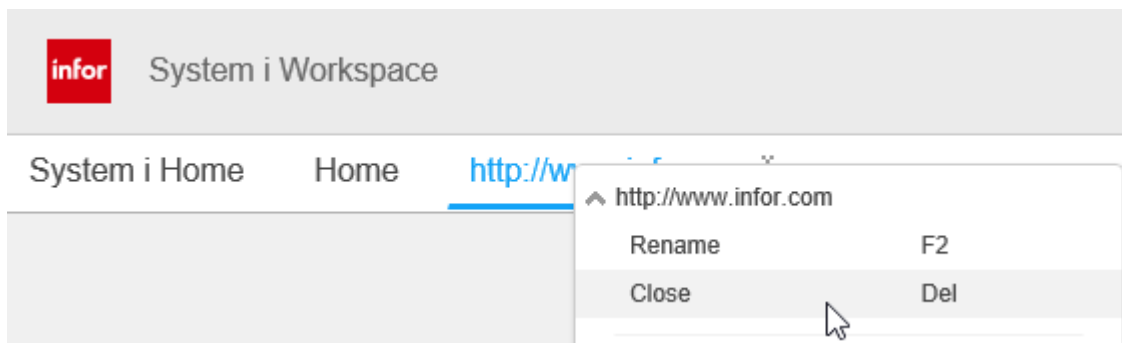
To switch between tabs, click on the tab heading. The heading of the current tab is shown in blue.

If you are allowed to close a tab, a cross will be shown in the top-right corner of the tab when you move the mouse over the tab. The background of the close option will go grey as you hover over the icon, for example:



If you click on the cross, the tab will be closed and your previous tab will become the currently active one.

Alternatively, you can use the context menu to close the tab. Right-click on the tab heading and you will see the option to close the tab.



If the tab has focus, denoted by a blue border around the tab, pressing the Delete key will also close the tab.

**Caution:** Many System i tasks do not support the close using the cross on the tab, as it can terminate the process abnormally. Instead, use the appropriate function key (for example, F3 or F12) to exit the task.

You will also see the option which allows you to re-name the tab. Select this and the tab title is replaced with an edit box, for example:



Enter your new title and press the Enter key to confirm the change. To cancel the rename of a tab, press the Escape key and then left-click the mouse outside the edit field.

Sometimes, the information on a tab changes whilst it is not currently the active tab. In this situation, System i Workspace will display an animated envelope icon on the tab heading to indicate that something has changed on that tab. This will remain until you click on the tab and make it active.

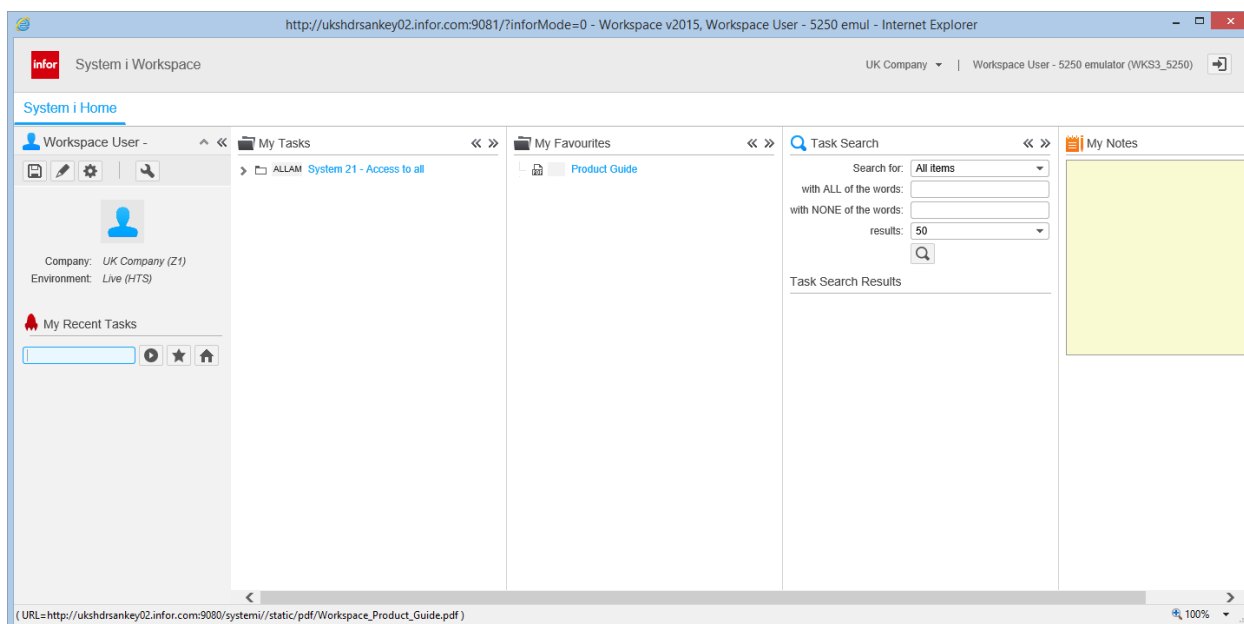
You can use the Next Tab option from the Context Menu or the ALT + N keyboard shortcut to move to the active tab to the right of the current tab. The next tab will be brought to the top of the stack, as if you had clicked on it with the mouse. If you press ALT + N on the last active tab, focus will wrap round to the first active tab (usually the System i Home tab).

You can use the Previous Tab option from the Context Menu or the ALT + P keyboard shortcut to move to the active tab to the left of the current tab. The previous tab will be brought to the top of the stack, as if you had clicked on it with the mouse. If you press ALT + P on the first active tab, focus will wrap round to the last active tab.

You can toggle between the current tab and the last active tab by pressing ALT + ` (the open quote symbol, usually the key to the left of the “1” key on a QWERTY keyboard). This allows you to toggle between, for example, two open System i Emulator tasks to compare business data. If the previous tab was closed or hidden, then using this option will return to the System i Home tab.

## The System i Home tab

The System i Home tab is divided into two main sections.



The left-hand fixed column (grey background) is called the System i Workspace Home Zone containing the current User Details and the Recent Tasks list.

The remaining portion of the display is divided up into zones, each containing one or more sections. This area is scrollable as on smaller displays, not all the information may be visible.

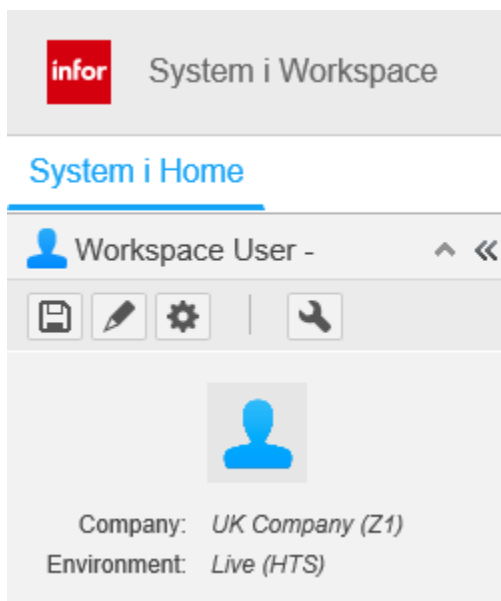
A standard set of zones are provided which contain Widgets to help you to work with your ERP System; My Tasks, My Favorites, Task Search and My Notes.

If the current System i Environment is WFi (workflow) enabled, you will also see an Outstanding Actions section.



Additional zones and sections may be provided by your System Administrator. These will be placed after the My Notes zone. Additional zones are not covered by this guide.



## The System i Workspace Home zone

### User details








In the title area, the name of the current user is displayed. This is read from System Manager.

Clicking the  icon will collapse the User Details section. Click the  icon to expand it back to its original height.


The  icon will collapse the System i Home Zone. Click the  icon to expand it back to its original width.

The toolbar provides access to features relating to your User Profile. The options available are...

Button	Description
	<p>Favorites, Notes and System i Emulator Preferences are automatically saved to the IBM i when they are changed. Any other System i Workspace Settings and Recent Tasks are saved when you Sign Out of System i Workspace.</p> <p>Selecting this option will force all these different settings to be saved immediately.</p>
	<p>Open a new tab containing the System i Work With User Profiles (WRKUSRPRF) program, using the System i Emulator. This program can be used to alter characteristics of your System i user profile.</p>
<b>Caution:</b> See the System i Emulator chapter for more detail.	
<b>Caution:</b> Your System i Administrator can hide this option or restrict the changes that can be made using this program.	
	<p>Displays the Maintain Password dialog (see below).</p>
	<p>Displays the Change Session Properties dialog (see below). This option is not available when running inside Infor Ming.le.</p>
	<p>Use this icon to sign out and close the System i Workspace window. It will only be shown on the toolbar when running inside Infor Ming.le™.</p> <p>Prior to Sign Out, System i Workspace will attempt to save any changes to your Favorites, preferences and settings.</p>
<b>Caution:</b> Never use the normal Internet Explorer/Microsoft Edge/Google Chrome browser window close button to exit from System i Workspace as this may leave record-locks on your System i applications which could prevent other users from accessing those objects	

## Maintain Password Dialog

This dialog allows you to change your System i password within the System i Workspace configuration page.



The 'Maintain Passwords' dialog box is shown. It has a title bar with a close button (X). The dialog contains the following fields:

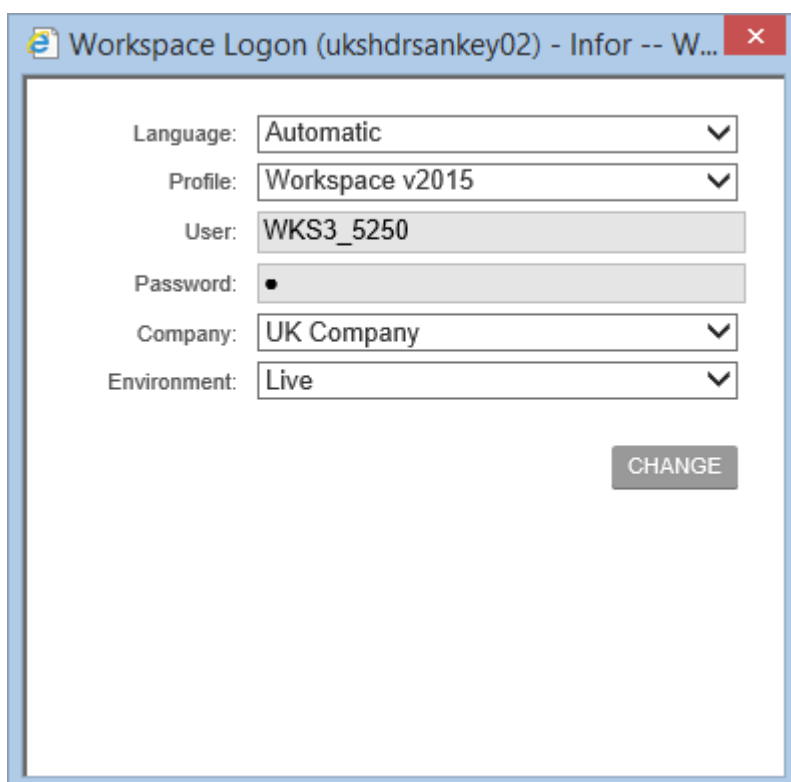
Profile	Workspace v2015
User	WKS3_5250
Password	<input type="password"/>
New Password	<input type="password"/>
New Password (2)	<input type="password"/>

- Changing your System i Password

1 Enter your current password and your new password (twice) and then click on **Change**.

### Change session properties dialog

Click on the **Switch Profile Settings** option to display this dialog.



The 'Workspace Logon' dialog box is shown. It has a title bar with a close button (X). The dialog contains the following fields:

Language:	Automatic	▼
Profile:	Workspace v2015	▼
User:	WKS3_5250	
Password:	<input type="password"/>	
Company:	UK Company	▼
Environment:	Live	▼

CHANGE

This dialog allows you to change your settings for your current profile or log on to a new profile. System i Workspace will allow you to be signed in onto more than one profile at a time.

Click on the **Change** button to proceed with your new settings. Alternatively, click on the close button (the red rectangle with white cross, in the top right-hand corner of the dialog) to keep your previous settings.

This dialog can be used to change the company. However, it is simpler and more efficient to perform these operations using the dedicated option available on the dropdown menu within the header.

## Fields

### Language

Select the language which you want System i Workspace to use for all its text and message dialogs.

The default is Automatic which means that System i Workspace will choose the language automatically, based on the language for your System i user profile.

### Profile

Select your desired profile.

If your System Administrator has only configured one profile then this field will be disabled. However if more than one profile is available then you will need to choose the one you wish to use.

The descriptions on the profiles have been chosen by your System Administrator and should reflect the different configurations which your company requires.

### User/Password

If you change to a different profile that uses a different Database Connection to the previous profile, the User and Password fields become enabled. Enter a valid System i user profile.

### Company

Select the company which will be used for launching all your System i Application tasks.

The visibility and the ability to select a company is optional. Your System Administrator may have chosen to restrict this function, in which case this field will be disabled or not shown.

### Environment

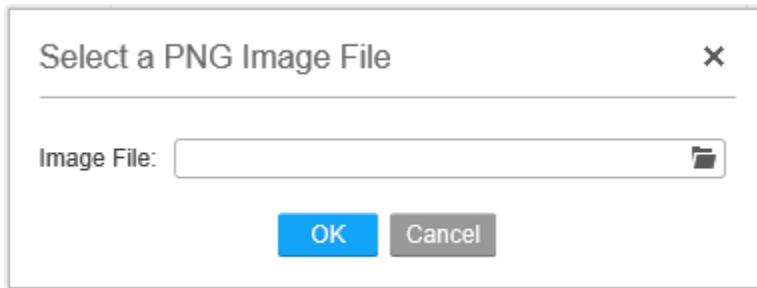
Select the environment which will be used for launching all your System i Application tasks.

The ability to select an environment is optional. Your System Administrator may have chosen to restrict this function, in which case this field will be disabled.

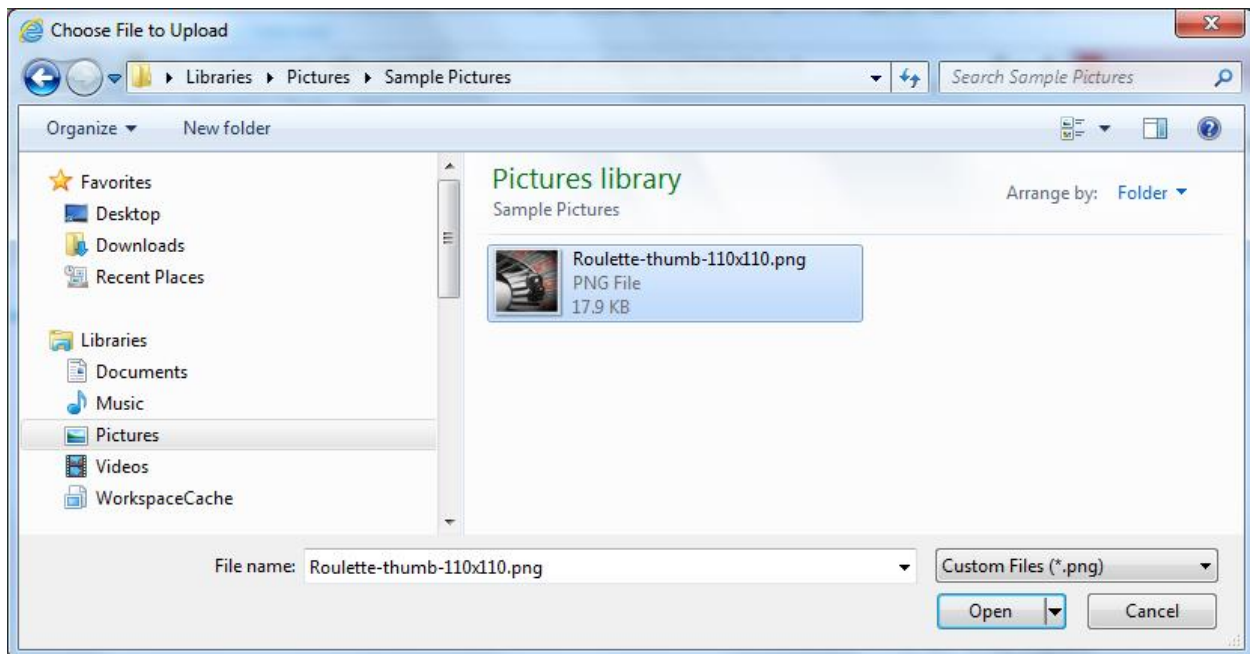
### Your User Image

The User Image within the System i Home Zone can be set to any valid PNG image. To change the image, right-click within the System i Home Zone and select Upload User Profile Image from the context menu. The following dialog will be displayed...





Click the  icon to open a standard Microsoft Windows file selection dialog...

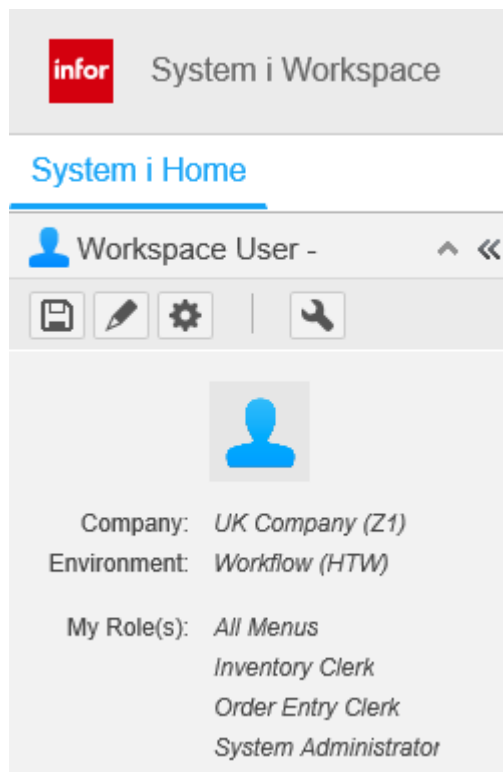


Use this to locate the PNG file you wish to use as your User Profile image. The image must be in the PNG format and be less than 500Kb in size. Select the file and click Open. The filename will be updated in the previous dialog. Select OK to upload the image to the System i Workspace server, or Cancel to abort the operation.

If the upload is successful, the image within the System i Home Zone will be updated with the new image. If the upload fails, an error message will be shown explaining the reason for the issue.

**Caution:** The System Administrator may disable the use of this feature, in which case they will need to manually install your User Profile image file within System i Workspace.

The current System i Company and Environment are shown below the User Image. If the current Environment is running in Role Processing or WFi mode, you will see any Roles you are assigned to within this area, for example:



## My Recent Tasks

The My Recent Tasks section contains the Quick Launch edit field and associated icons, plus a list of up to ten recently opened tasks.

### Quick Launch




The Quick Launch edit field allows you to launch different types of tasks, quickly and conveniently. The following types of tasks are supported:

Task Type	Syntax	Example(s)
URL	<URL>	http://www.google.com file://deptserver/map.pdf
Menu	/<Menu code>	/OEE
System Manager menu shortcut	<Option>/<Menu code>	1/OEE 12/ARE

Task Type	Syntax	Example(s)
System i command	<Command>	WRKSPLF RUNQRY *N ORDERS
Open the Change Password Dialog	CHGPWD	CHGPWD

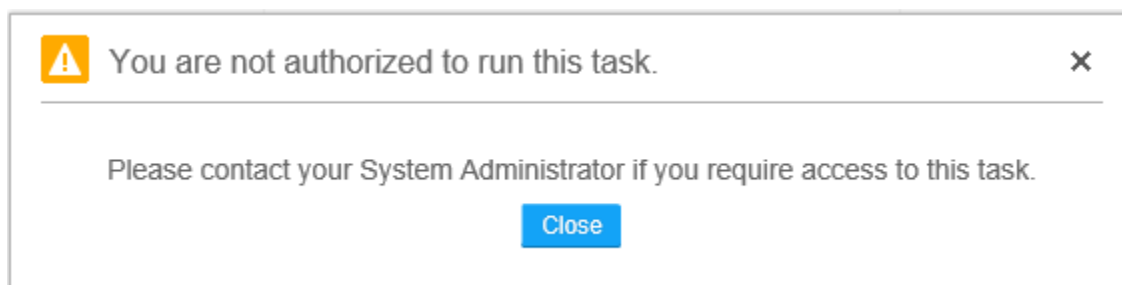
**Caution:** Quick Launch can only run System i Commands that contain forty characters or less. If you wish to run a command longer than forty characters, first run "CALL QCMD" from Quick Launch, which will open up a new System i Emulator session that will allow any permissible IBM command. In the case of SQL queries or file names, using a shorter query or library name may bring the command under the character limit and allow it to be executed via Quick Launch. If the command is something that is run often, consider wrapping it in a dedicated System Manager Task or CL program.

A set of buttons are shown next to the Quick Launch edit field. These provide the following function...

Button	Title	Action
	Launch	Launch the task specified in the Quick Launch edit field
	Add To Favorites	Add a favorite for the task specified in the Quick Launch edit field in the My Favorites column. <b>Caution:</b> Your System Administrator may restrict the visibility of this function.
	Home	Display your initial menu(s) in the My Tasks column

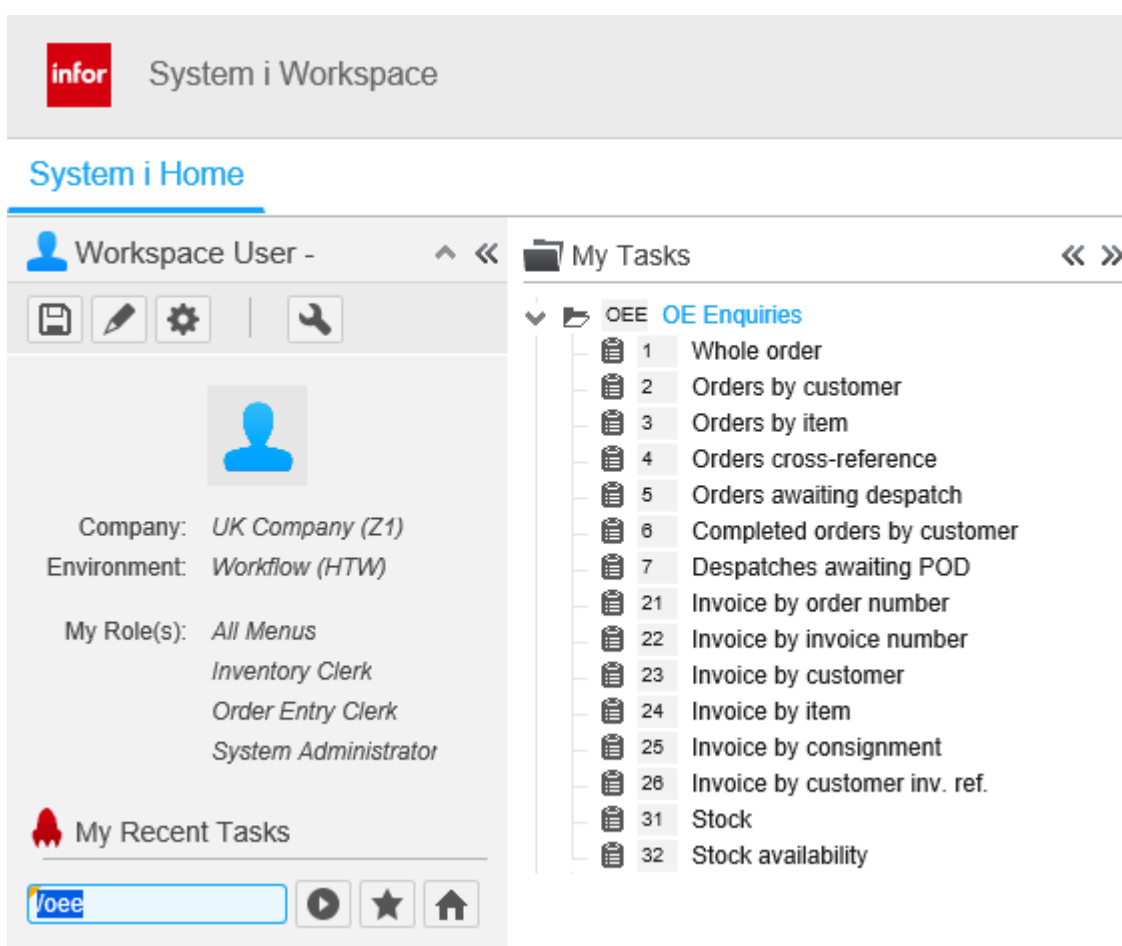
Entering a URL, System Manager Menu Shortcut or System i then pressing the Enter key, or clicking on the Launch button, will start the selected task in a new System i Workspace Tab.

If you are not authorized, within System Manager, to the entered System Manager Menu Shortcut task, you will see the following error message...

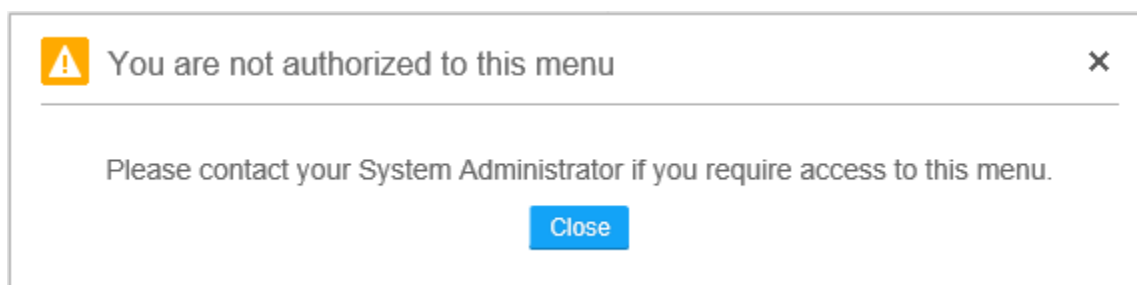


Click **Close** to close the dialog.

Entering a Menu will change the My Tasks column to display that Menu, for example:



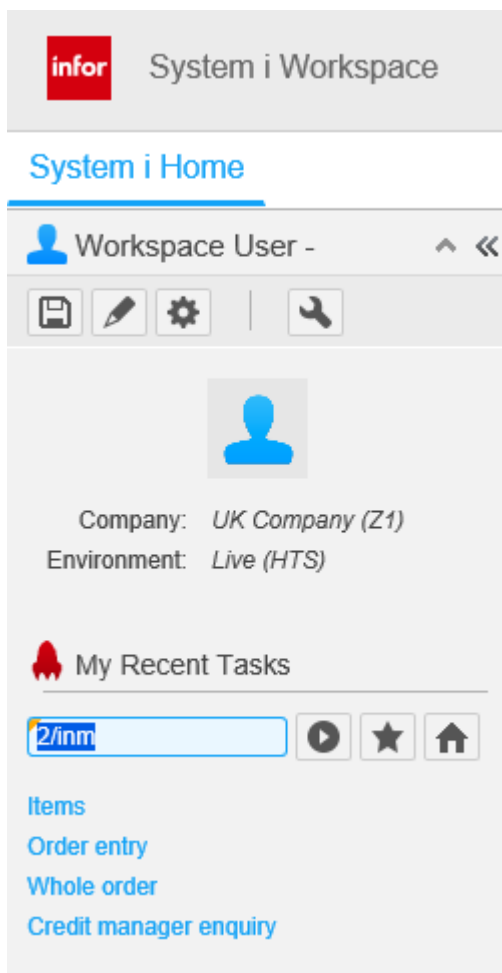
If you are not authorized within System Manager to the Menu you will see the following error message...



Click **Close** to close the dialog.

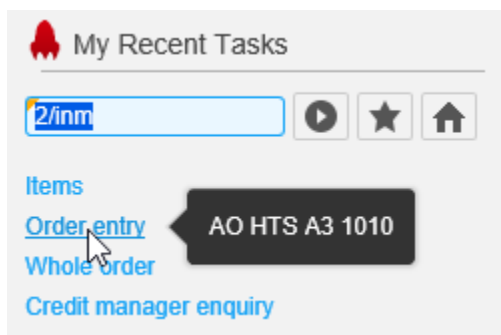
## Recent Tasks List

As you run authorized System Manager Tasks, URLs or System i Commands, they will automatically be added to your Recent Tasks list, underneath the Quick Launch edit field, for example:



Up to ten tasks will be stored in this list. The most recent task opened is placed at the top of the list. To re-open a task in the Recent Tasks list, click on the blue text link.

If you hover over the link with the mouse pointer, you will see a tooltip showing the System Manager Task code it will execute, for example:



When you exit System i Workspace, your Recent Tasks list is saved. On next sign in to the same System i Environment, it is restored.

## Scrollable zones

The remaining area of the System i Home Tab is made up of four or more columns.

### General zone features

When set at the default width, the « icon will collapse the zone to a thin strip (the icon will be shrunk and the title and content removed). Click the » icon to expand it back to its original width and layout.

When set at the default width, the » icon will expand the zone to double its current size, pushing any zones to the right further across the display. Click the « icon to collapse it back to its original width.

These options are also available via the Context Menu.

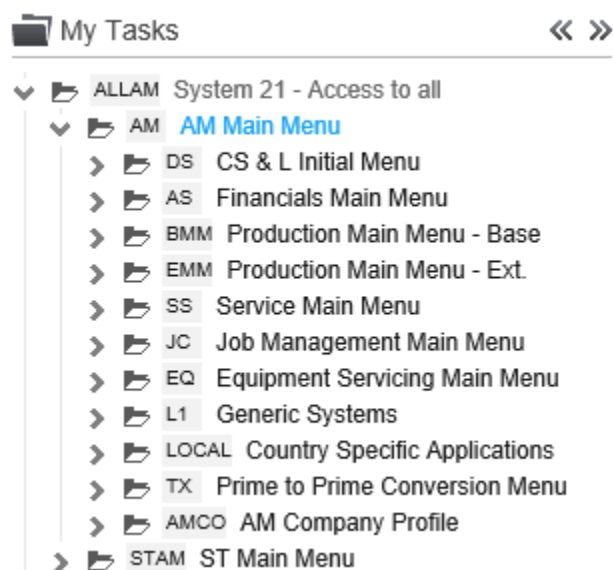
If you hover over the title bar at the top of the column, you should notice that the cursor changes to the standard “move” icon for your operating system. Press and hold the left-mouse button and move the column left or right to the position you require then release the mouse button to confirm the new position. The column may only be moved along the x-axis.

**Caution:** The System Administrator may disable the use of this feature.

The expand/collapse and position of the columns is saved when you click the Save Settings option or sign out of System i Workspace. Your layout will be restored the next time you return to System i Workspace with the same user profile.

**Caution:** You can use the Reset Dashboard Columns option from the System i Home zone context menu to restore the default layout.

## The My Tasks zone



On first sign in to System i Workspace, the My Tasks zone displays a tree view containing either of the following:

- 1 If your IBM i system has Role Processing enabled, My Tasks will contain the System Manager menus and tasks for the Default Menu of each of the Roles you are assigned to
- 2 If your IBM i system does not have Role Processing enabled, My Tasks will contain the System Manager menus and tasks you are authorized to within your Default menu


The tasks are organized in a multi-menu hierarchy.

**Caution:** The structure and content of this will be managed by your System Administrator and is unlikely to match the example shown above.

**Caution:** Your Default menu is defined against your User profile within System Manager.




The following types of entries in the tree view are supported...

Icon	Description
	System i command
	System i Application task
	URL task
	System Manager folder (or menu)

Icon	Description
	PDF Document

---

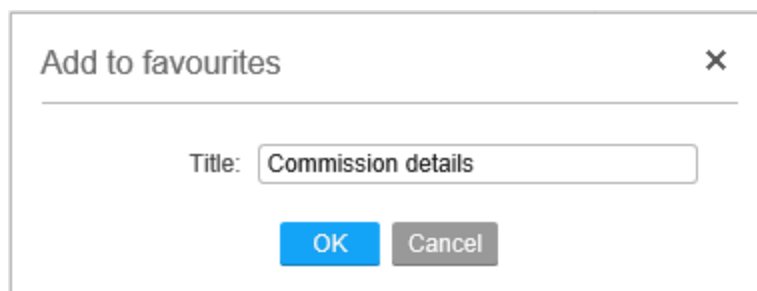
The following features are supported within the My Tasks tree view...

Feature	Description
Expand and collapse	Use the  icon to expand (open) a folder. Use the  icon to collapse the folder.
Drag-and-drop	<p>You can drag individual items and folders from this tree into the My Favorites column.</p> <p>If you attempt to drag an item to an invalid location, the cursor will change to a “not allowed” icon, for example:</p> 
Copy	You can copy individual items and folders from this tree into a buffer and then paste them into the My Favorites zone. Right-click on any item and select the <i>Copy</i> option
Open	A single mouse click on any task item within the tree view will launch a task in a new tab. You can also right-click on any task item and select the <i>Open</i> option.
Open with prompt	Right-click on an item and select <i>Open with Prompt</i> from the Context Menu. This will launch a task but request System Manager to display the Submit Job prompt screen before the job is submitted (This is only applicable for certain tasks and will be treated as a normal Open if the request is not applicable).
<b>Caution:</b> Your System Administrator must also authorize your System i user profile, within System Manager, to have this feature.	

---



Feature	Description
Add To Favorites	You can add any task or menu to the My Favorites zone. Right-click on the item and select the <i>Add to favorites</i> option. The following dialog will appear...



Use the Title field to alter the text that will appear within the My Favorites zone. Click OK to add the item to the My Favorites zone or click Cancel to abort.

**Caution:** Your System Administrator may restrict the visibility of this function.

The My Tasks zone can change as a result of any of the following actions:

- If the Home icon is pressed in the System i Home Zone, you will see your initial or default menu(s) reloaded.
- If a System i menu or menu option is launched from the Quick Launch edit field you will see the actual menu loaded (as the top-level entry).

## The My Favorites zone



The My Favorites zone allows you to collect and manage the tasks which you use most frequently. You have total control over its contents.


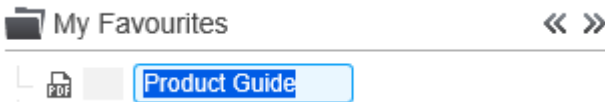
**Caution:** Your System Administrator may restrict the visibility of this function.

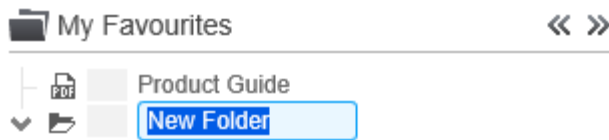
**Caution:** Your favorites are associated with a particular System i, user account and environment. This means that if you change environment, user or System i server then you will have a different set of favorites, which you can also change and customize as you want.

On first sign in to System i Workspace, the My Favorites zone displays a tree view containing a single entry, a link to this product guide.

**Caution:** If you have previously used an earlier version of System i Workspace, you may see your favorites from that product, unless your System Administrator has chosen to remove them.

The following features are supported within the My Favorites tree view...

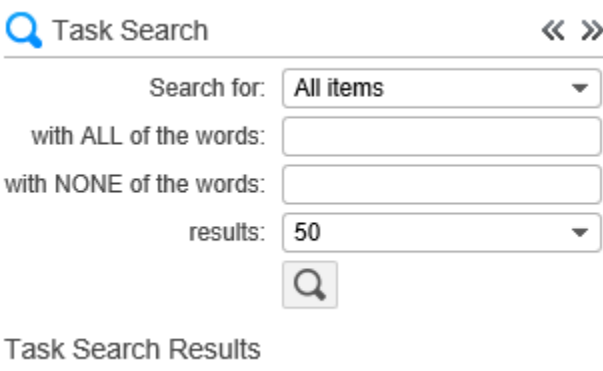
Feature	Description
Expand and collapse	Use the ► icon to expand (open) a folder. Use the ▼ icon to collapse the folder.
Drag-and-drop	<p>Items can be added to My Favorites by dragging them from other tree views within the System i Home tab.</p> <p>You can drag and drop items within the tree view to change their order.</p> <p>Dropping over the text will insert the new entry above or below the one under the mouse. This allows you to control the sequence of items.</p> <p>If you attempt to drag an item to an invalid location, the cursor will change to a “not allowed” icon, for example:</p> 
Rename	<p>Right-click on an item and select <i>Rename</i> from the Context Menu. An in-place edit field will be shown containing the item text, which you can alter, for example:</p>  <p>Type in the new title and press Tab or Enter (or left-click outside the field) to accept the change or Escape to cancel the change.</p>

Feature	Description
New folder	<p>First, make sure that no item in the tree is highlighted in blue; if one is, left-click in any blank space below any items within the My Favorites content area to clear the blue highlight.</p> <p>Right-click in any blank space below any items within the My Favorites content area and select <i>New Folder</i> from the Context Menu. A new tree view folder will be placed at the bottom of the My Favorites tree view and made editable so you can enter a new folder title; E.g.</p>  <p>Type in the new title and press Tab (or left-click outside the field) to accept the change or Escape to cancel the change.</p>
Cut	Right-click on an item and select <i>Cut</i> from the Context Menu to remove the item from the tree view and place it within the copy buffer.
Copy	Right-click on an item and select <i>Copy</i> from the Context Menu to place it within the copy buffer.
Paste	<p>First, make sure that no item in the tree is highlighted in blue; if one is left-click in any blank space within the My Favorites content area to clear the highlight.</p> <p>Right-click in any blank space within the My Favorites content area and select <i>Paste</i> from the Context Menu. The context of the copy buffer will be placed at the bottom of the My Favorites tree view.</p> <p>If you wish to paste an item into a folder, right-click on the folder and select <i>Paste</i> from the Context Menu.</p> <div style="background-color: #e6f2e6; padding: 10px; margin-top: 10px;"> <p><b>Caution:</b> You are allowed to remove content from System Manager application folders that you have dragged into the My Favorites tree view but you are not allowed to add anything new.</p> </div>
Delete	Right-click on an item and select <i>Delete</i> from the Context Menu to remove the item from the tree view.
Open	A single mouse click on any task item within the tree view will launch a task in a new tab. You can also right-click on any task item and select the <i>Open</i> option.

Feature	Description
Open with prompt	Right-click on an item and select <i>Open with Prompt</i> from the Context Menu This will launch a task but request System Manager to display the Submit Job prompt screen before the job is submitted (This is only applicable for certain tasks and will be treated as a normal Open if the request is not applicable).
<b>Caution:</b> Your System Administrator must also authorize your System i user profile, within System Manager, to have this feature.	

Any changes you make to your favorites will be automatically saved to the IBM i. Should any disruption occur during your usage of System i Workspace (i.e. power cut, network failure) you will not lose the changes and the favorites will be as you left them the next time you sign in to the same environment.

## The Task Search zone



Task Search

Search for: All items

with ALL of the words:

with NONE of the words:

results: 50

Task Search Results

The Task Search zone allows you to search for items defined in System Manager.

## Fields

### Search for

Select the type of item you wish to search for. The available types are...

Search Type	Description
All items	The search will match against any item within System Manager.
All menus	The search will only match against menu items within System Manager.

Search Type	Description
All commands	The search will only match against System i command items within System Manager.
All tasks	The search will only match against System i task items within System Manager.
All web pages	The search will only match against web page items within System Manager.

**Caution:** Web Page items are tasks within System Manager that are defined as a special type (task type 6) and have an associated URL.

### with ALL of the words

Enter the word, words or phrase to search for. The search results will return items that contain the content of this field.

If you search for multiple words, System i Workspace will display items which contain those words in *any* sequence. So for example, “item report” would match against “Report by item” as well as “Item cost variance report”.

If you want to search for particular phrases such as “by item”, type the phrase in double quotes and System i Workspace will search for the phrase as a whole rather than as separate words.

The \* wildcard is supported. Searching for “print\*item” will find items where the word “print” appears *before* the word “item”. If the search text begins (or ends) with \*, System i Workspace will look for the text at the end (or beginning respectively).

Examples:


Search String	Description
order	Match anything containing the word “order” including when it is part of a bigger word such as “reorder”.
order item	Match anything containing the words “order” and “item” anywhere in the text, regardless of which comes first.
“order item”	Match anything contained the phrase “order item”, that is to say ignoring anything where “order” is not immediately followed by a space then “item”.
order*item	Match anything containing the words “order” and “item” anywhere in the text as long as “order” precedes “item”.
order*	Match anything that starts with the word “order”.
*item	Match anything that ends with the word “item”.


## with NONE of the words

Enter the word, words or phrase to search for. The search results will return items that do not contain the content of this field. Search syntax is the same as the *with ALL of the words* field.

## results

Select the number of results to return that match the supplied search criteria. The default is 50.

Click the  icon to start the search (or press the Enter key when the focus is inside one of the Task Search edit fields). The results are displayed in the Task Search Results section of the column as a tree view, for example:


 Task Search « »

Search for:



with ALL of the words:



with NONE of the words:



results:




Task Search Results

  Search "+stockroom +MENU" - (2)

  STOCK02US Stock Check by Stockroom

  STOCK02 Stock Check by Stockroom

If no results are found for the entered search criteria, the following message will be shown within the tree view...


 Task Search « »

Search for:



with ALL of the words:

with NONE of the words:

results:



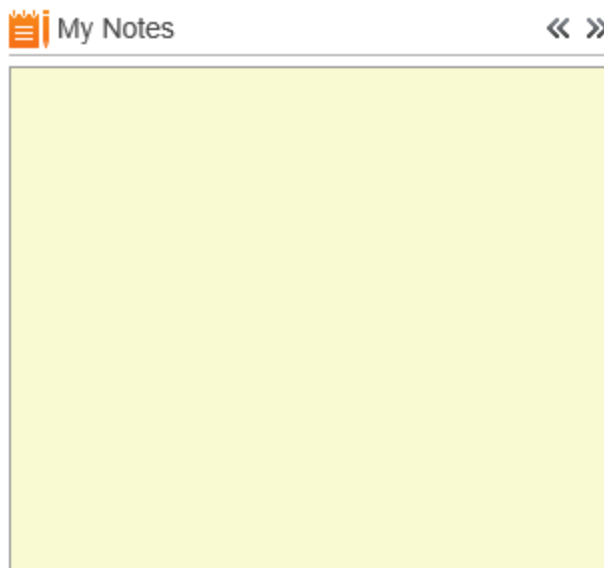
Task Search Results

  No results for search found.

**Caution:** The search results will only show items to which you are authorized within System Manager.

The tree view, within the Task Search Results section, has the same functionality as the one described above for My Tasks so, for example, you can drag-and-drop items from the Task Search Results into the My Favorites zone and launch tasks.

## The My Notes zone




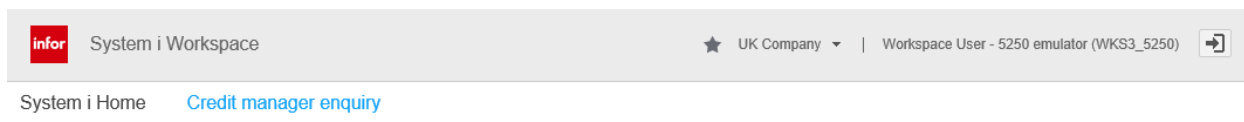
The My Notes zone contains a free-format multi-line text field where you can enter data relevant to your role, for example the last Sales Order number you created within your ERP software.

The text content of the field will be automatically saved to the IBM i when changed. Should any disruption occur during your usage of System i Workspace (i.e. power cut, network failure) you will not lose the changes and the notes will be as you left them the next time you sign in to the same environment.

## Advanced usage

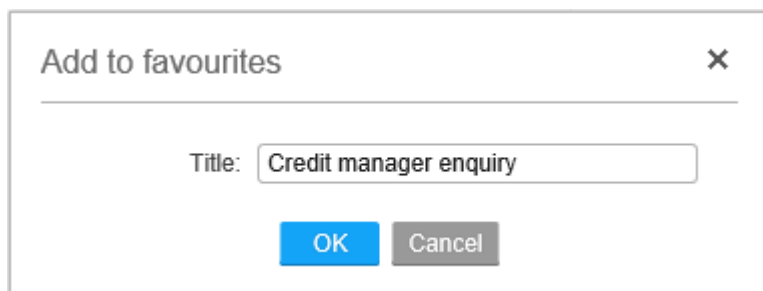
### Add to favorites icon

Once you have executed a task, URL or command, you will see the  icon appear within the header, to the left of the dropdown menu options, for example:

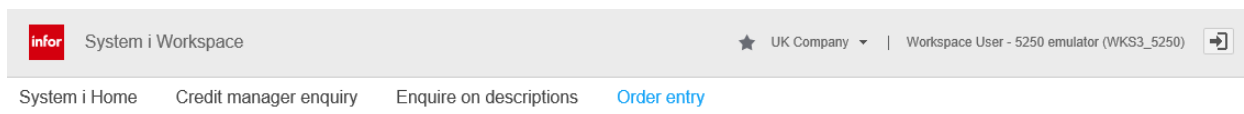


**Caution:** Your System Administrator may restrict the visibility of this function.

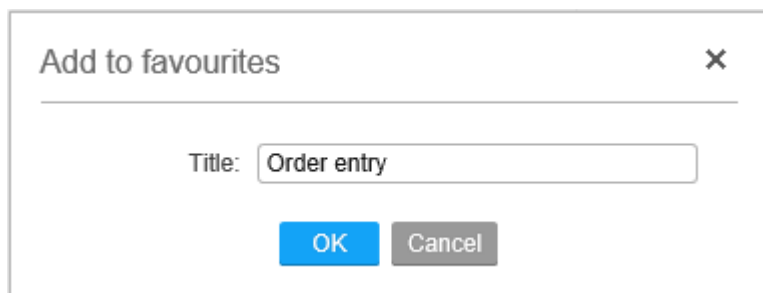
Clicking this icon will open the *Add to Favorites* dialog for the last task that was executed, for example:



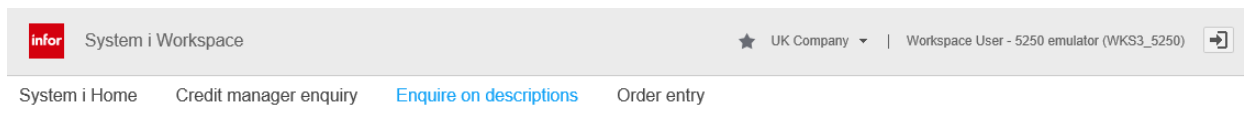
If you have multiple tasks open, then each time that you switch between the tabs, the *Add to Favorites* data will be updated, for example We start three different tasks...



The *Order entry* tab has the focus so, if you click the *Add to Favorites* icon, the *Order entry* tabs task data will be presented, for example:

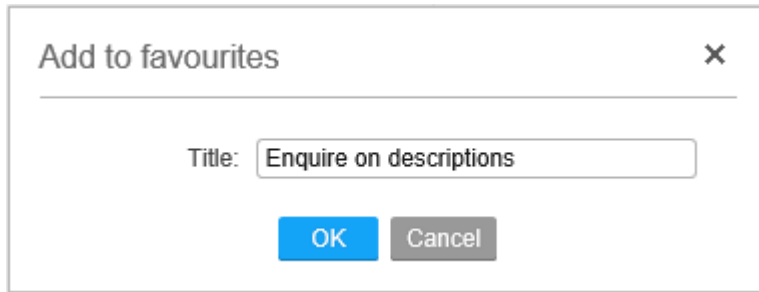


If the focus is changed to the *Enquire on descriptions* tab...



...then clicking the *Add to favorites* icon, that tabs task data will be presented, for example:



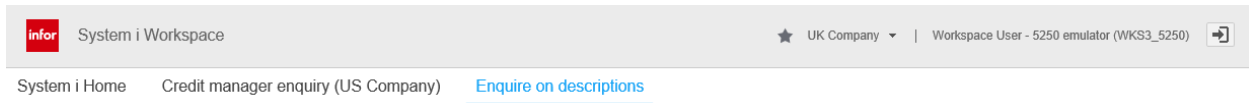


## Additional tab information

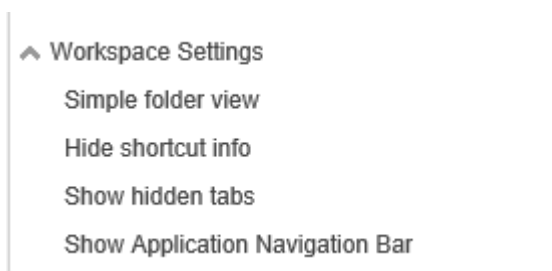
The current profile, company and environment are used when launching new tasks. However, existing tasks will still continue to use the details with which they were launched.

To help you distinguish tabs which are not using the current settings, System i Workspace will show information which is different in the tab heading in brackets.

In the example below, you can see that the current company is *UK Company*, but one of the other tabs is still using company *US Company*.



## System i Workspace settings

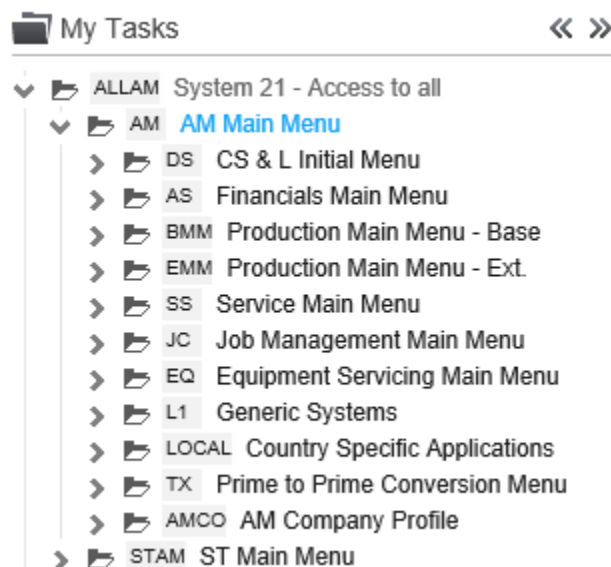


The final section of the Context menu contains global options which affect the System i Workspace user interface. A tick against an item indicates that it is enabled.

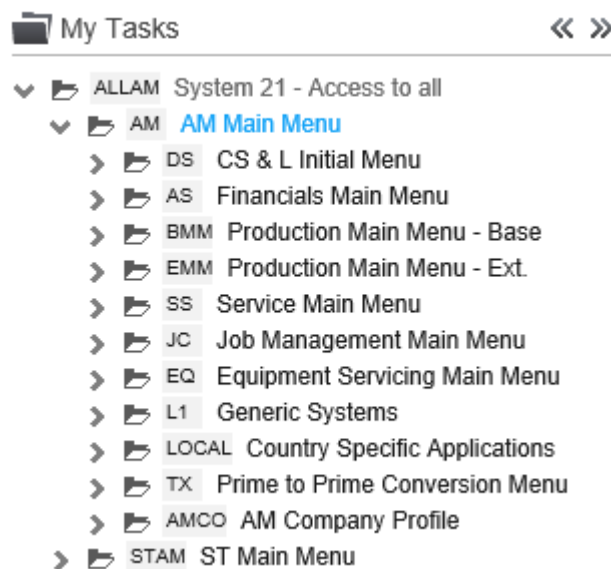
## Options

### Simple Folder View

The default tree view shows lines indicating which folders are sub-folders of others, for example:



If you select Simple Folder View, none of these lines will be shown, for example:

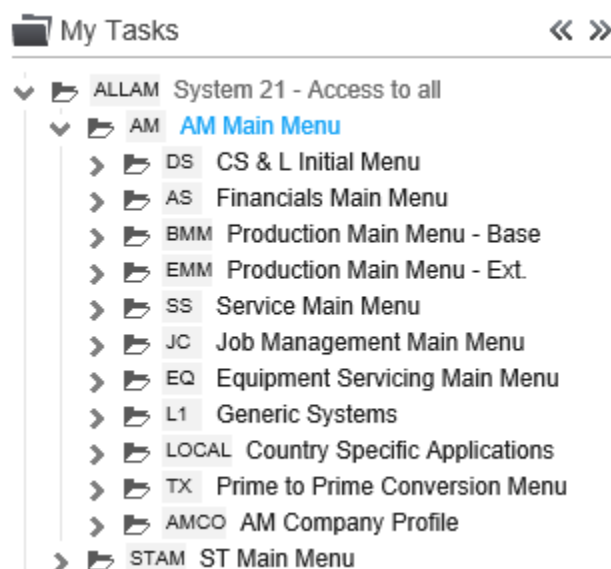


The Simple Folder View can be toggled on and off. All tree views within System i Workspace are affected by this option.

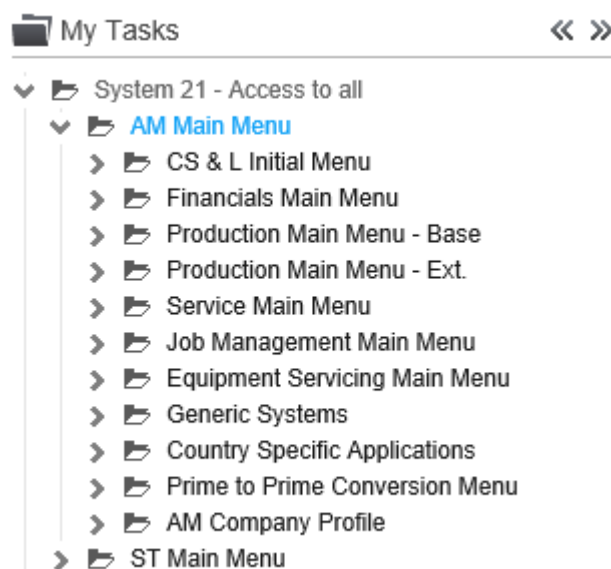
This setting is saved when you exit System i Workspace, and restored when you sign in to the same environment.

## Hide Shortcut Info

The default tree view shows menu option and menu code information to the left of the task and menu descriptions, for example:



Select Hide Shortcut Info if you do not wish to see this information, for example:



The Hide Shortcut Info can be toggled on and off. All tree views within System i Workspace are affected by this option.

This setting is saved when you exit System i Workspace, and restored when you sign in to the same environment.

## Show Hidden Tabs

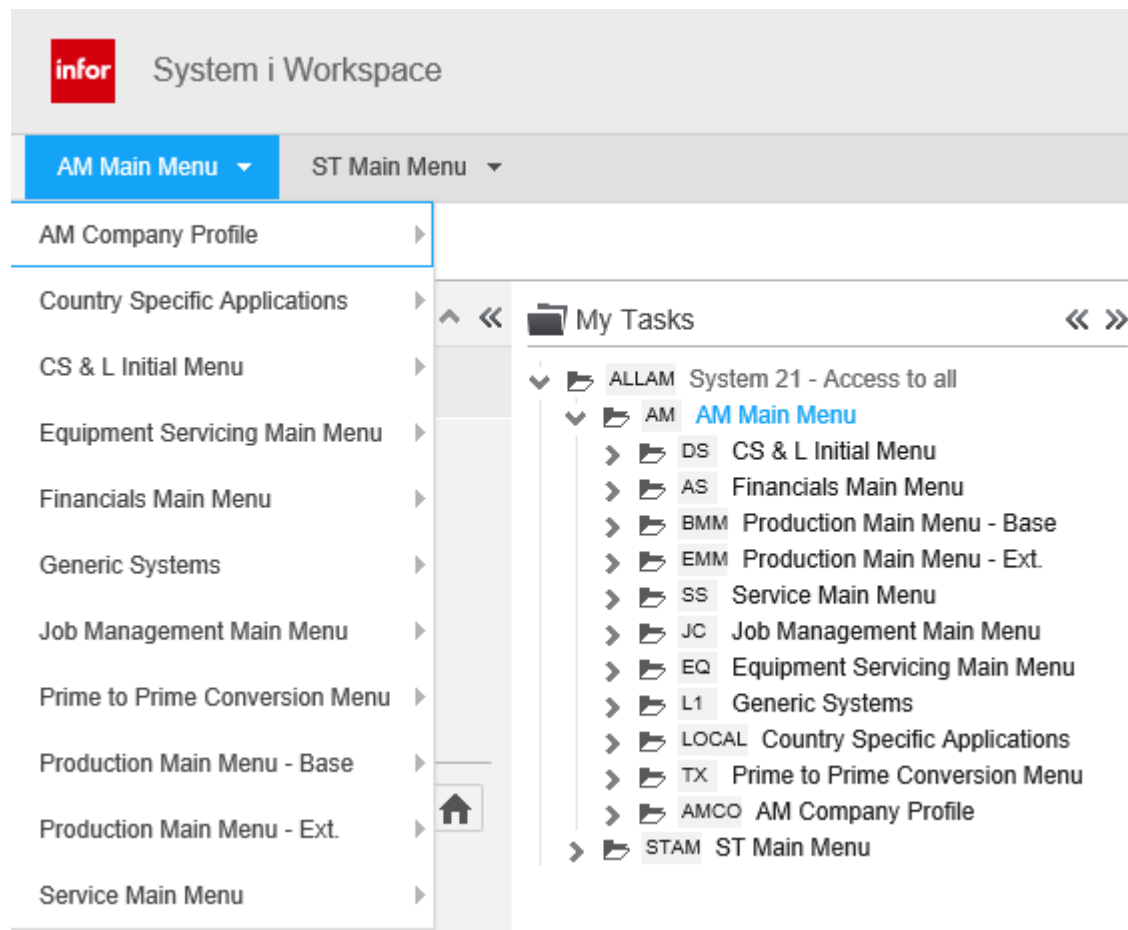
This is for use by the System Administrator only.

## Show Application Navigation Bar

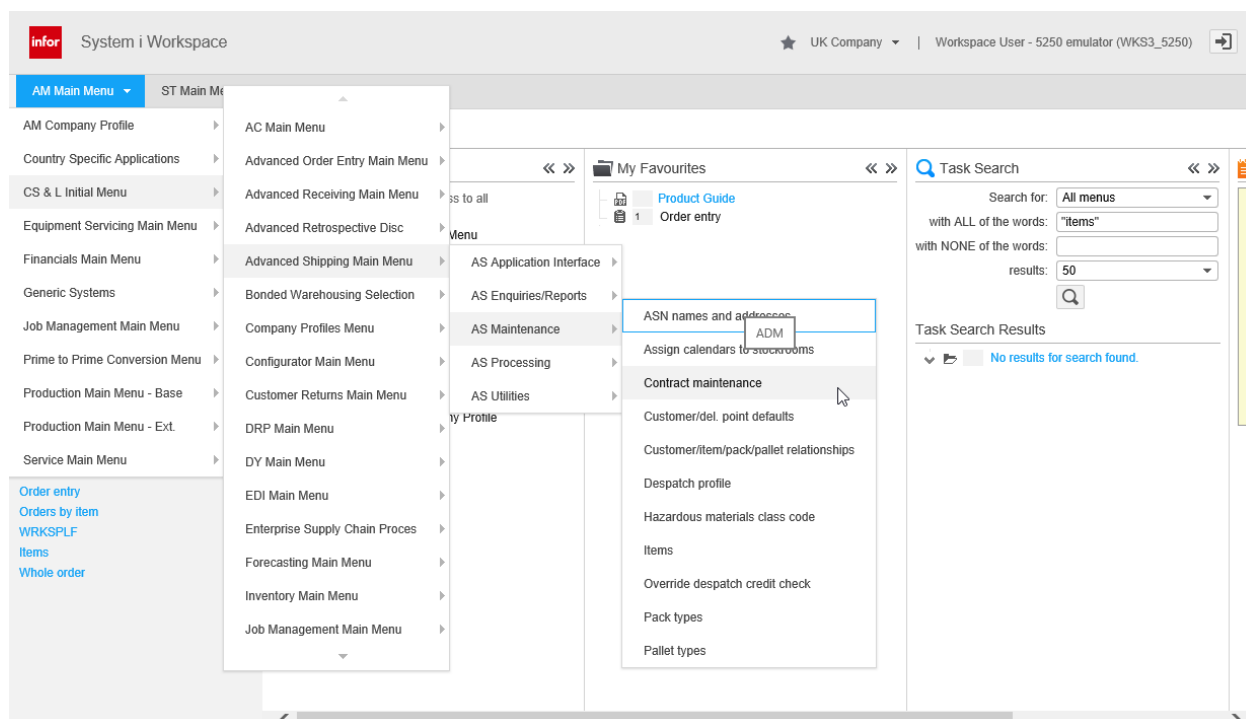
Selecting this option opens the Application Navigation Bar. The Application Navigation Bar displays the information available in the My Tasks section as a dropdown menu underneath the Header, for example:



Click on any menu within the bar that has the ▼ icon to expand it downwards, for example:



As you move the highlight over tasks within the menu that end with the ▶ icon, they will expand to show more options. Any option that does not end with the ▶ icon is a task that can be opened when you click it, for example:



Once opened, the Application Navigation Bar is always available as it sits outside of the tabbed area, so you can launch new tasks without having to return to the System i Home tab.

Select the *Show Application Navigation Bar* option again to close the Application Navigation Bar.

This setting is saved when you exit System i Workspace, and restored when you sign in to the same environment.

## Launching a task

Each of the ERP application tasks being accessed within System i Workspace will display a graphical user interface (GUI) that will allow users to process transactions or view data in ways that are not available in the traditional System i interface. The user interface enhances efficiency and ease of use for the underlying application.

## Basic overview

To launch an Application task, you can do any of the following from the System i Home tab:

- Expand the My Task tree view and its sub-menus until you find the task you want to launch. Single click on the either the task icon or the task description.
- Click on the desired task from your My Favorites tree view, if available
- Click on the desired task from your Search Results tree view
- Click on the desired task from your Recent Tasks area
- Enter the menu shortcut from the Quick Launch box (for example, 1/GLE)
- Enter the System i command from the Quick Launch box (for example, WRKSPLF)
- Enter the URL on the Quick Launch box
- Open the Application Navigation bar and select an option from the drop down menu

The following are examples of the resulting screens that may be displayed:

For a task launched using the System i Emulator (with System21 3.0 or 3.1 Application Screen Design Template data set on)...

**Credit Manager Enquiry Window**

To display this window, enter a customer code and then press Enter on the Credit Manager Enquiry Selection window.

Each quarter of the window displays a different kind of information:

- The top left-hand quarter displays common performance ratios.
- The top right-hand quarter displays credit information.
- The bottom left-hand quarter displays balances, by overdue category.
- The bottom right-hand quarter displays posting information, and details of the status of the account.

**Fields**

**Note:** All the fields described below are output only unless otherwise stated.

**Level**

This field will only be displayed if the customer is a hierarchy customer. It shows the hierarchy level number of the customer.

**Debtor Days**

**Note:** All Credit Manager ratios hold a maximum of 99,999 days

The figure shown here represents the weighted average number of days outstanding for the customer's outstanding debt.

Take all open items for the customer. For each item, multiply the number of days between document and current date by the outstanding balance.

Divide the resulting total by the total of the outstanding balance

For a task launched using LX/WebTop:

infor System i Workspace ★ | RSANKEY

System i Home [ORD700D1 Order Entry](#)

Order Directory

Actions Copy URL V8.3.4 T+R+BASE WT 4.4.1 TST (CH0)

AC	Order	Cust	Customer PO	Request	Wh	T	Cls	Stat
	92	72222226	RB-DATES?	6/22/05	I33	V	401	10001
	10100795	72222201	RB37902A21	5/08/03	I33	V	005	00101
	10100894	72222299	RB61861A3B	7/08/02	I11	9	401	10001
	10103153	72222226	RB37902A296-ECC	6/09/06	I33	V	401	00011
	10103387	72222228	RB37902A16P6-MRGN23	9/09/02	I33	V	401	00010
	10103825	72222201	RB61861A15P33B	9/18/02	I33	V	401	10001
	10103904	72222201	RB37902P16	9/19/02	I33	V	401	01001
	10103976	72222201	RB62735T1	9/20/02	I33	V	401	01001
	10104618	72222201	RB61861T/ORD303D-1	10/04/02	I33	V	401	01001
	10104778	722	RB-4-CHAR COUNTRY #2	10/09/02	I33	V	401	00010
	10104793	722	RB37902A15P992	10/09/02	I33	V	401	00010
	10104812	722	RB-BATCHPRICE1	10/10/02	I33	V	401	00010

For a task launched using Net-Link/IDF:

infor System i Workspace ★ | RSANKEY

System i Home [\(SS\) Accounts](#)

Accounts

File Display Maintain Help

Type	Name	Address	City	County	Postal code	Telephone
Customer	bk cust 272	Chicago			60661	3122551212
Customer	bk cust 272				60600	
Customer	bk test auto copy	Chicago			60661	
Customer	cd206d007 - 61853				60610	
Customer	cd206d007 - 618531				60610	
Customer	cd206d007 - 618532				60610	
Customer	cd206d007 - 618533				60610	
Customer	cd206d007 - 618534				60610	
Customer	cd206d007 - 618534				60610	
Customer	cd206d007 - 618536				60610	
Customer	cd206d007 - 618537				60610	
Customer	cd206d007 - 618538				60610	
Customer	changed name	Changed address line 1			60600	
Customer	changed name	Changed address line 1			60600	
Customer	changed name	Changed address line 1			60600	
Customer	changed name	Changed address line 1			60600	
Customer	company 67 base NTD tr: Customer address line number 1	Custome			60661	3125557878787
Customer	company 68 base PAR tr: Customer address line number 1	Custome			60661	3125557878787
Customer	company 68 base PAR tr: Customer address line number 1	Custome			60661	3125557878787
Customer	company 68 base PAR tr: Customer address line number 1	Custome			60661	3125557878787
Customer	howe Customer Master	21 w main Chicago			60610	
Customer	smg resupply PLEASE DI				60661	
Customer	smm customer 2691 co 2: 500 W. Madison				60661	312-474-7400





### Overview

The System i Emulator is used when...

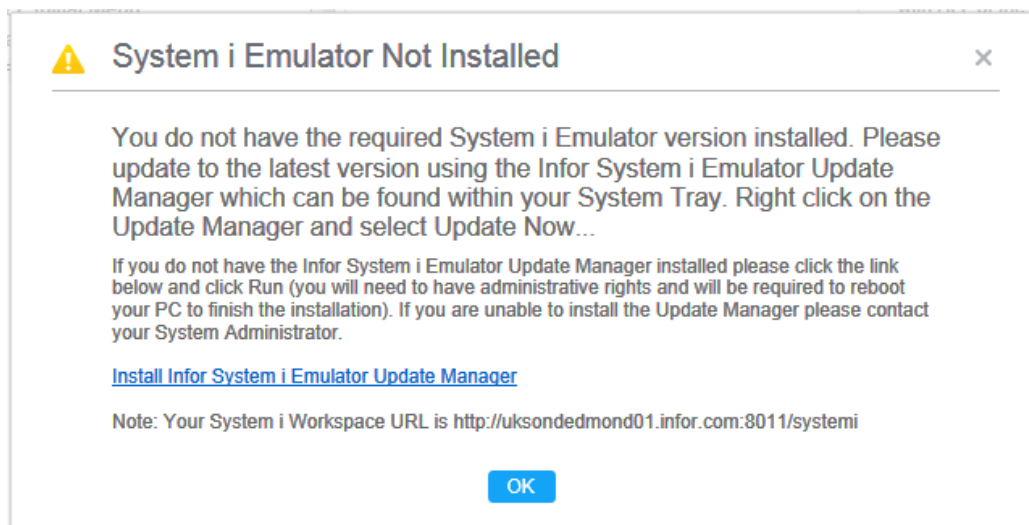
- The user launches a task and the task definition is set to use the System i Emulator within System Manager
- The user issues a System i command

This chapter gives an introduction to using the System i Emulator and explains the extra features provided by System i Workspace.

**Caution:** The System i Emulator is not supported with Google Chrome or Microsoft Edge (in standard mode). If you wish to use the System i Emulator, you must use one of the supported Microsoft Internet Explorer or Microsoft Edge (in “Internet Explorer Mode”) releases. Please speak to your Systems Administrator for more advice.

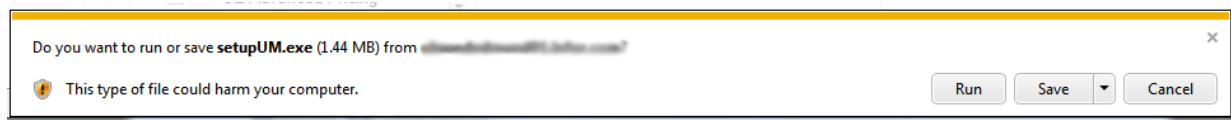
### Installing the System i Emulator

On launching the first System i Emulator task, you may be presented with the following screen if the System i Emulator and/or System i Emulator Update Manager has not been installed on your machine.

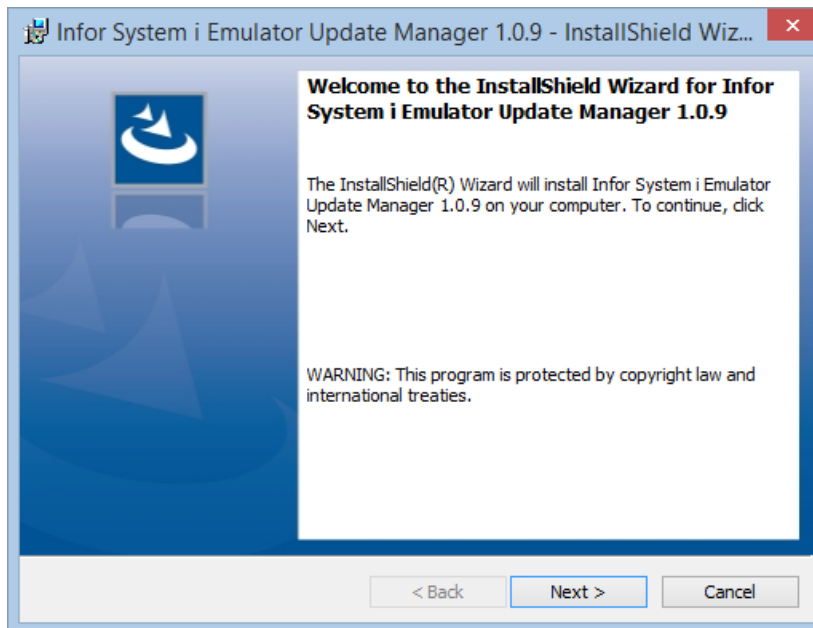


Click on the **Install Infor System i Emulator Update Manager** to begin the download of the installer onto your machine. Once the download has been completed, you should get the following banner at the bottom of your browser window:

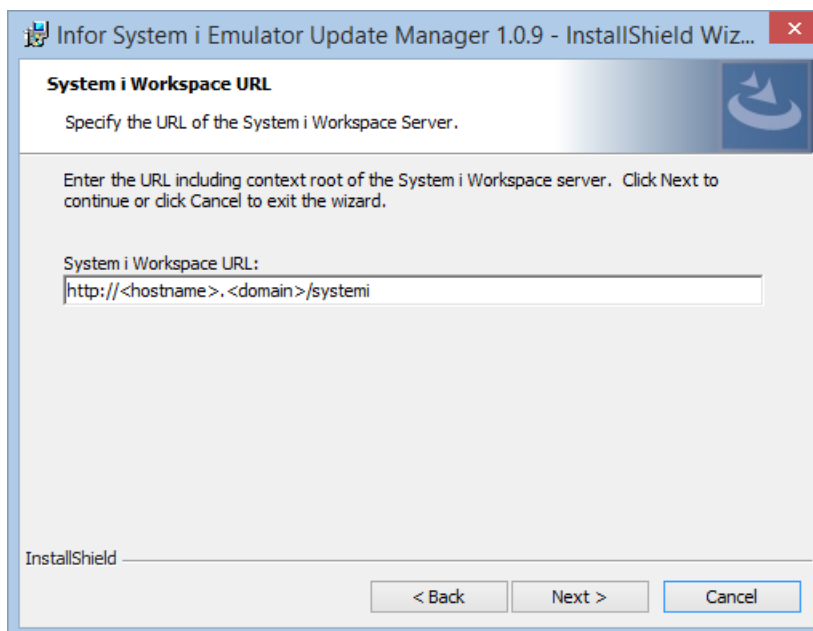
Please note that you need local administrations rights on the PC. If you do not have these rights or are unsure contact your System Administrator.



Click on the **Run** button to launch the installer program.

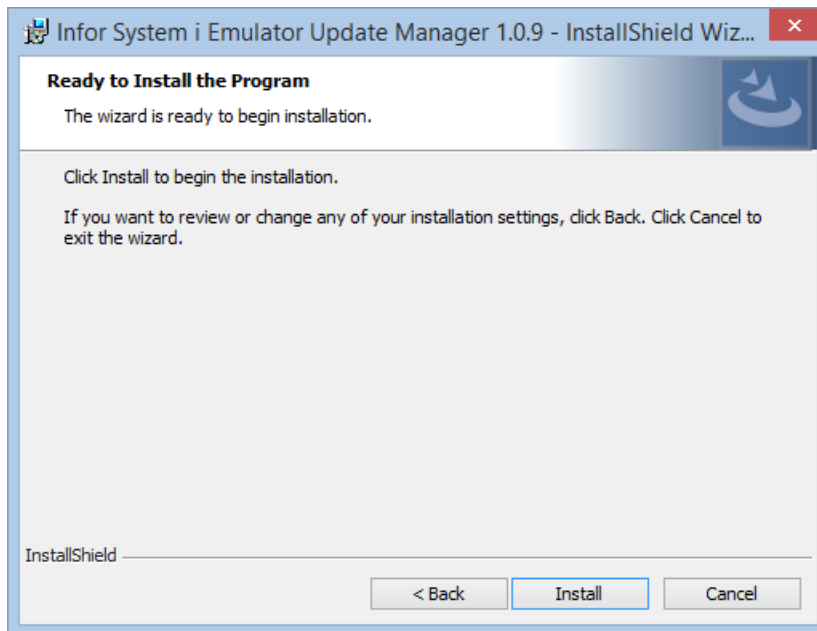


Click on **Next** which will take you to the following screen.

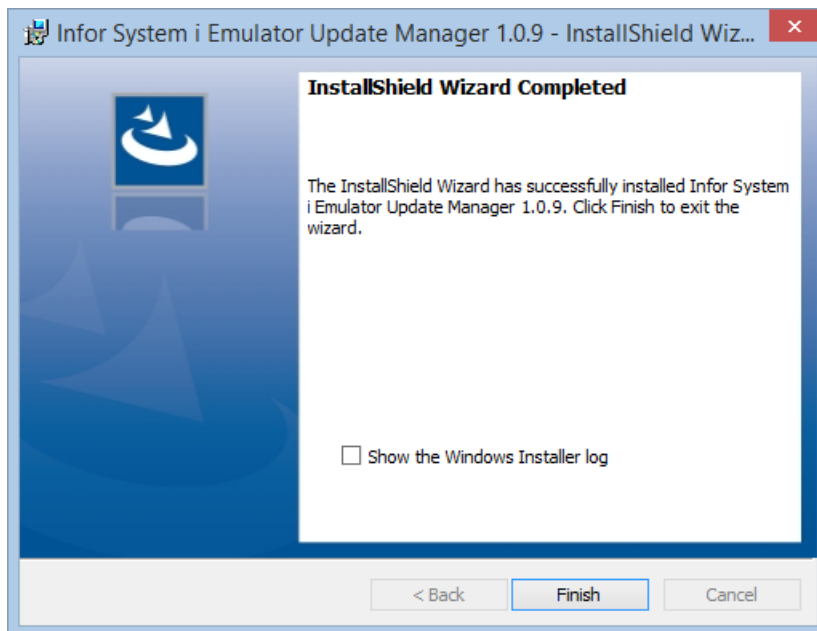


Enter in the URL address of the server (including the port number, if required). If the “/systemi” context path has been set-up differently by the administrator, then update this to the correct path. This information can be referenced from the address bar within the Internet Explorer window that launched the installer (not visible if you’re using Ming.le).

Click **Next**.



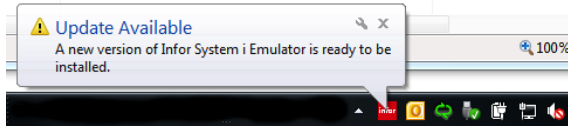
Click **Install** to start the installation.



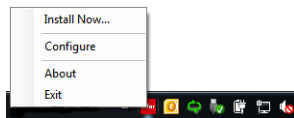
Click **Finish**.

You **must** restart your Windows PC now

Once the computer restart has been completed and you have logged in again, after a few moments, a new icon will appear in the Microsoft Windows System Tray area. As the System i Emulator has not been installed at this point, you will receive a balloon pop-up message at the same time indicating that a new version of the Infor System i Emulator is ready to be installed, for example:



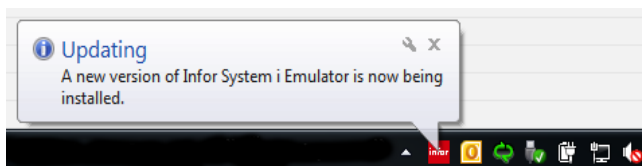
Close all open Internet Explorer windows and then Right-click on the system tray icon and select the **Install Now...** option to start the install of the System i Emulator.



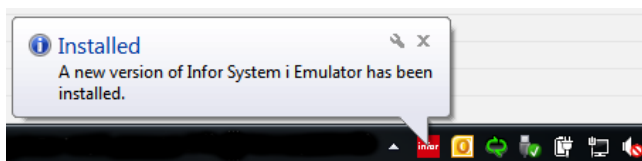
**Caution:** The installation process occurs in the background; further balloon messages will report the success/failure of the installation. If you encounter any issues with the installation, you should contact your System Administrator for further assistance.

**Caution:** If you fail to close all the Internet Explorer windows before launching the System i Emulator installer; you may receive a warning from the system tray. The installer requires Internet Explorer to not be running when it is performing the install. Note that sometimes there may be Internet Explorer processes running in the background. These also need to be stopped (e.g. by using Task Manager)

A balloon message from the Windows System Tray Infor icon will advise when the installation has started, for example:



A second message will be displayed once the System i Emulator installation has been completed, for example:



Once the installation of the System i Emulator has been completed, navigate to the System i Workspace home page tab and launch a task.

**Caution:** If, for any reason, the System i Emulator does not work, you may need to contact your System Administrator for further assistance to diagnose and correct the issue.

## Basic overview

On launching the first System i Emulator task, you will be presented with the first panel of the task within a new System i Workspace tab.

The screenshot displays the System i Workspace application. At the top, the header bar includes the Infor logo, the text "System i Workspace", a star icon, a "Demonstration" dropdown menu, the user information "Workspace User - 5250 emulator (WKS3\_5250)", and a help icon. Below the header, a navigation bar shows "System i Home" and a link "Enquire on account". The main area features a toolbar with icons for Actions, List, Print, and Help. The central panel is titled "Account Code Enquiry" and contains the following fields:

- GL134      Z1 - UK Demo Company      USER WKS3\_5250      26/03/15      14:42:40
- Account .....?
- Or
- Ledger .....?
- Period .....
- Budget code 1 ...?
- Budget code 2 ...?
- Year end .....  (FIS/ALT)

At the bottom of the panel, there are two buttons: "F3:Exit" and "F4:Prompt".

**Caution:** If you have installed the latest Screen Design Templates (SDT) for your version of the application, and within the System i Workspace configuration page, you have selected a specific Application Data set for your profile, your System i Emulator panel may look slightly different. For example, if the same panel above is displayed using the System21 3.0 or 3.1 Application SDT, it will be displayed as below.

The SDT will contain basic formatting changes over some of the panels, using functionality available within the System i Emulator Designer. This may include adding prompt buttons, date buttons, dropdown lists, checkboxes, or changing foreground/background color and alignment.

The latest SDT files can be found on the Infor Xtreme website.

**Caution:** For optimum viewing experience, it is recommended that you set your System i Emulator font to Arial with the font size set to 12.

infor

System i Workspace

★ Demonstration | Workspace User - 5250 emulator (WKS3\_5250)

System i Home

Enquire on account

Account Code Enquiry

⚙

Actions

Account:

Or

Ledger:

Period:

1409

Budget code 1:

CBD

1

Budget code 2:

FBD

0

Year end:

FIS

Exit

**Caution:** For more details on the functionality available within the System i Emulator Designer, please refer to the appropriate guide which you can find in the Product Documentation section of Infor Xtreme, as described in the "Contacting Infor" section at the beginning of this manual.

The GUI screen of the System i task (which we will refer to as a panel) is made up of the following sections:

Task header

Account Code Enquiry

ANALYL

⚙

Header Part	Description
Blue Text	Task Description, which is usually the title of the current screen (Optional)
Grey Text	The Record ID, which is usually the key element of the current screen, such as the Customer Code or an Order Number (Optional)
⚙	Click this icon to open the System i Emulator Preferences dialog (see Emulator Preferences section below)

## Toolbar



Toolbar which may contain a set of buttons for available actions that can be perform within the panel...

Icon	Description
	Click this option to open a drop down menu containing the Command/Function Key actions for the current screen.
	Select All Fields (see Copying and Pasting Text section below). Click twice to remove any selection.
	Copy Button and Copy Options Menu (see Copying and Pasting Text section below)
	Paste the contents of the Windows Clipboard into the screen (see Copying and Pasting Text section below)
	Click this option to open a drop down menu containing additional utilities (see Utilities section below).
	Print panel
	Export to a Microsoft Excel Workbook. This icon is only displayed when a table has been defined via System i Designer for the current screen.
	Take a screen shot of the current screen or image and place it on the Microsoft Windows Clipboard (for use in other applications) and in the internal Screen-Shot Image Buffer (see Utilities section below)
	Design this screen. You will only see this icon if your System Administrator has authorized you to this function.
	Help

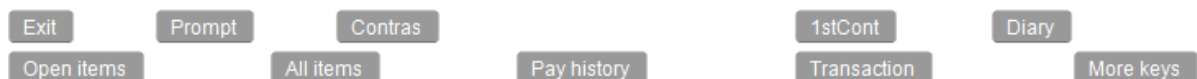


## Fields

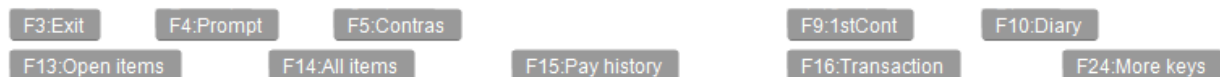
Account .....	<input type="text"/>
Or	
Ledger .....	<input type="text"/>
Period .....	<input type="text" value="1409"/>
Budget code 1 ... ?	<input type="text" value="CBD"/> <input type="text" value="1"/>
Budget code 2 ... ?	<input type="text" value="FBD"/> <input type="text" value="0"/>
Year end .....	<input type="text" value="FIS"/> (FIS/ALT)

A combination of display-only text fields (which we will refer to as labels) and entry fields (which we will refer to as edit fields). Edit fields have a grey border around them. The border and background change to blue when the edit field has the input focus. A panel may contain various combinations of labels and edit fields but there should usually be at least one label.

## Command buttons

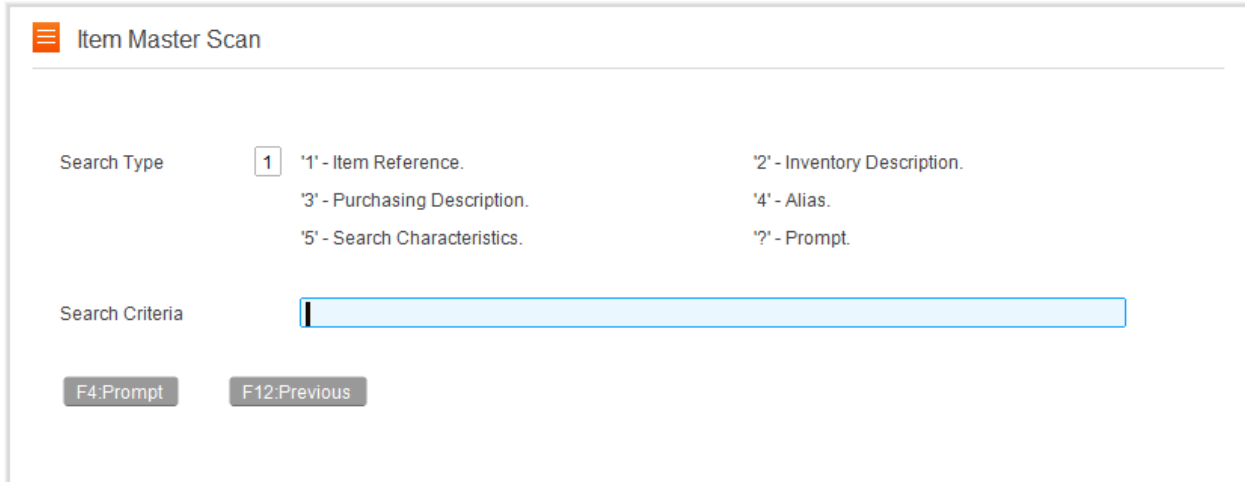


A set of action buttons (which we will refer to as command buttons). There is usually at least one command button. If no command button is shown you should still be able to press the Enter key. The command buttons are the same options displayed within the Actions Menu button within the Toolbar. If your System Administrator has chosen to display the function key value, it will appear to the left of the description; E.g.



## Popup windows

Some actions may cause additional popup windows to appear.

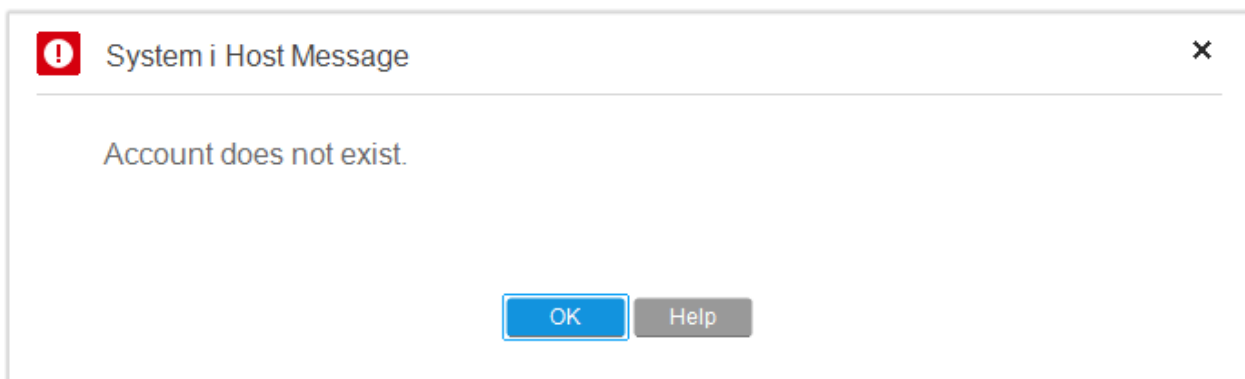


The screenshot shows a window titled "Item Master Scan" with a hamburger menu icon in the top left. The window contains a "Search Type" section with a dropdown menu set to "1". To the right of the dropdown are five options: "'1' - Item Reference.", "'2' - Inventory Description.", "'3' - Purchasing Description.", "'4' - Alias.", and "'5' - Search Characteristics.". Below this is a "Search Criteria" section with a text input field. At the bottom, there are two buttons: "F4:Prompt" and "F12:Previous".

These popup windows will appear above and outside of the main System i Workspace window. The popup will always stay on top of the System i Workspace window until closed but you can still perform actions within the main System i Workspace window (e.g. launch another task so you can perform an enquiry and copy system data into the popup).

## Message windows

Some actions may cause an error/warning message to be generated by your System i application, for example:

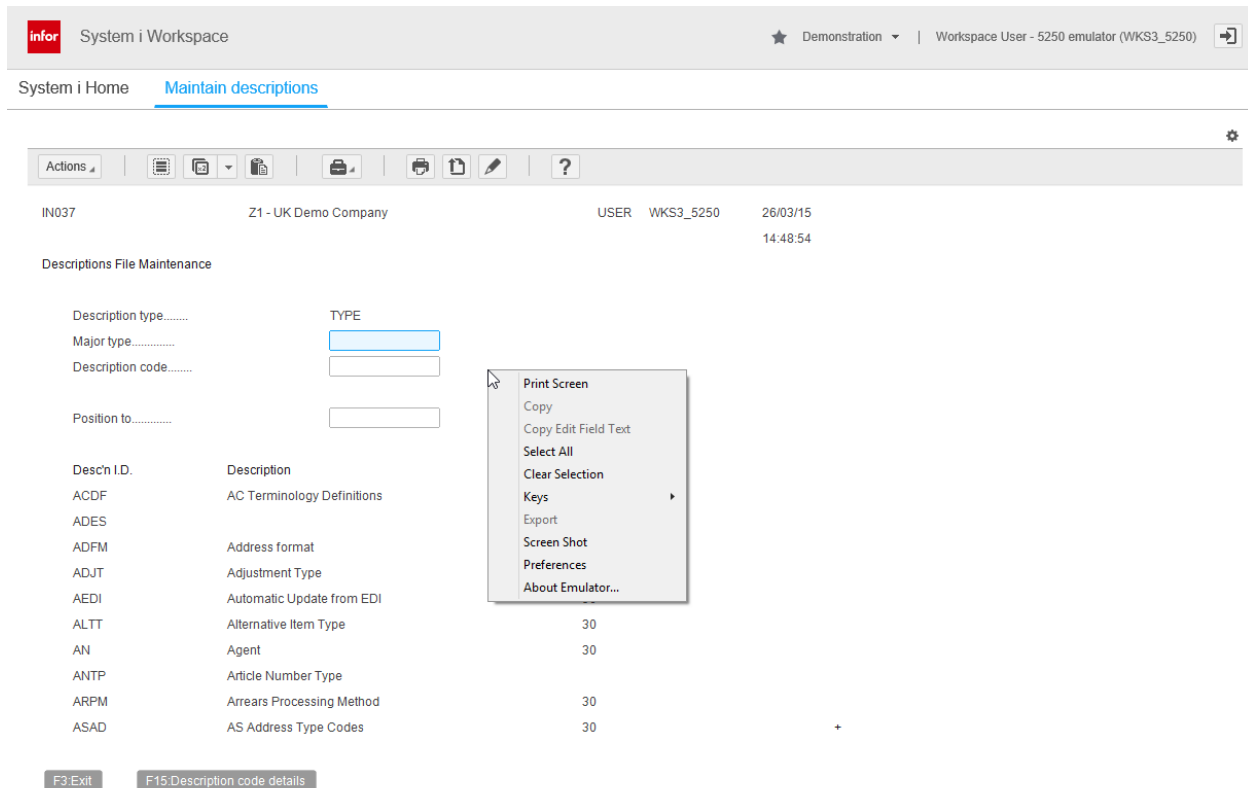


The screenshot shows a window titled "System i Host Message" with a red square icon containing a white exclamation mark in the top left and a close button (X) in the top right. The main text area displays the message "Account does not exist.". At the bottom, there are two buttons: "OK" and "Help".

You will not be able to perform any actions within the main System i Workspace window until the message has been dismissed using one of the provided buttons

## Context menu

Pressing, then releasing, the right mouse button within the frame of a panel (i.e. not inside an edit field) will show the Context Menu.



The following options are available:

Function	Action
Print Screen	Print the current screen to a local/network printer. The Windows Print Options dialog will open.
Copy	Copy all text and edit fields that are select (or within the selected dotted area for a monospaced font) to the Windows Clipboard as text
Copy Edit Field Text	Copy only text values within edit fields that are selected (or fall within the selected dotted area for a monospaced font) to the Windows Clipboard as text.
Select All	Places a dotted border around the entire screen area or selects all fields within the screen (font dependent). The selected fields/area can then be copied to the Windows Clipboard.
Clear Selection	Remove the current selection.

Function	Action
Keys	A selection of System i 5250 terminal specific keys for which there are no equivalents on PC keyboards.
Export	Only enabled when Designer table changes have been applied to the screen. See Additional Designer Controls section below.
Preferences	User-configurable display settings (discussed in a later section).
About Emulator	Show the About dialog.

## Selecting, copying and pasting text

### Using a proportional font

The following functionality applies when the current screen is rendered using a Proportional font (e.g. Arial, Times New Roman).

When using a Proportional Font, you can select one or more fields to be copied by holding down the Shift key and clicking with the left mouse button on any label, edit field or command button. A small orange rectangle will be drawn in the bottom left hand corner of the field to indicate it is selected, for example:

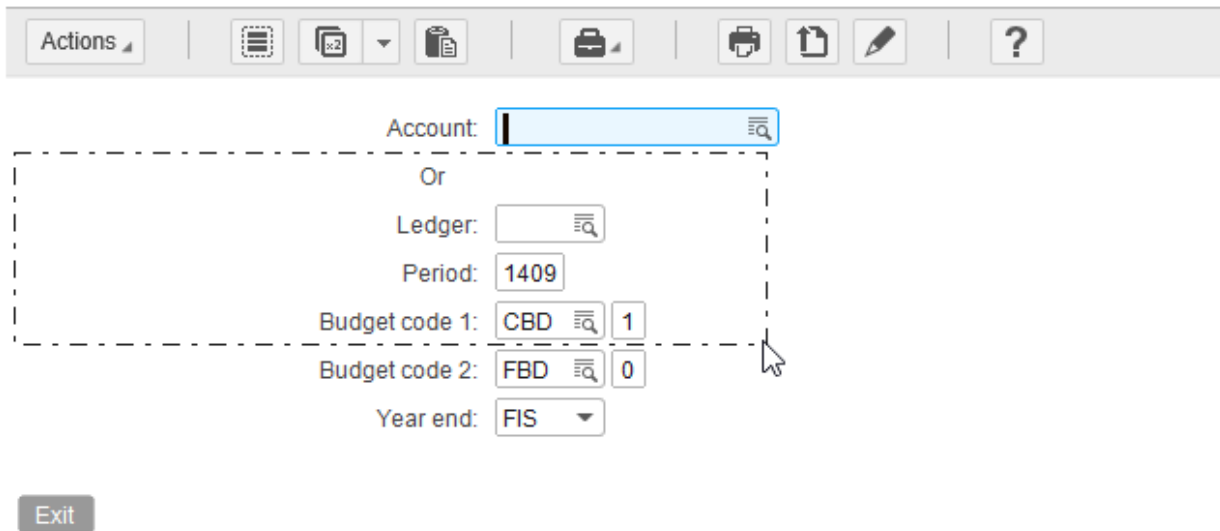


**Caution:** If you left-click on a Command Button, Prompt, Date, Check Box or Drop Down list control with the Shift key pressed you will not activate that control or cause any information to be sent to the System i server.

To un-select fields, hold down the Shift key and click on it again. The orange rectangle will be removed and the field will not be used in any subsequent Copy operations.

You can select multiple fields by holding down the right mouse on the System i Emulator background and dragging the dotted line around any area within the panel. Release the mouse button to set the area. Any fields within the area will be marked as selected, for example:

## Account Code Enquiry



Account:

Or

Ledger:

Period:

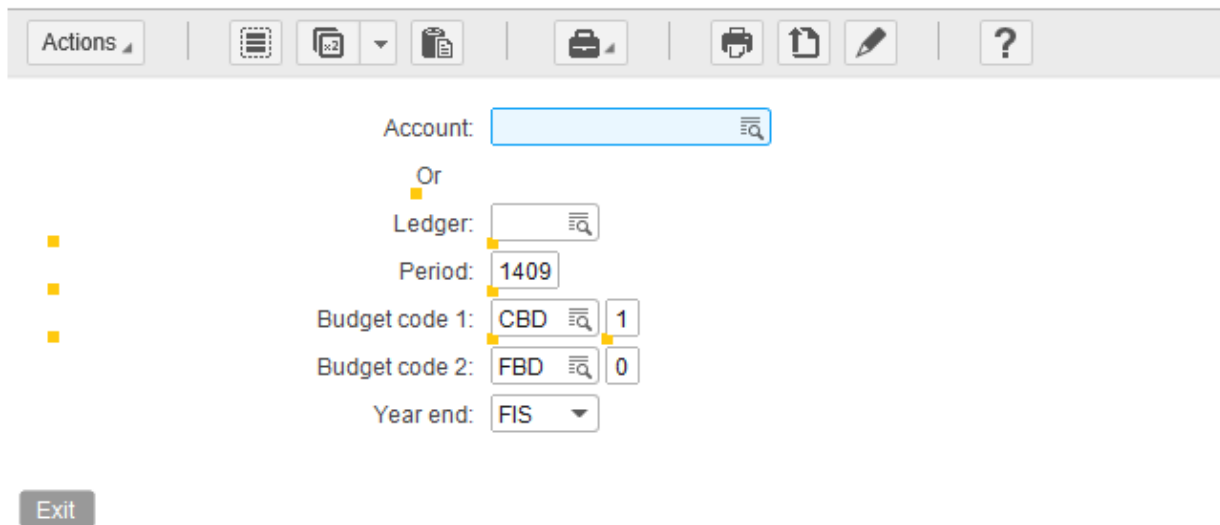
Budget code 1:

Budget code 2:

Year end:

Exit

## Account Code Enquiry



Account:

Or

Ledger:

Period:


Budget code 1:


Budget code 2:


Year end:

Exit


**Caution:** If a label has been right-aligned within Designer, the selection marker will be placed at the left-most extent of the field, as in the example above.

You can select all the fields within the screen by clicking the  button on the Toolbar or by using the Select All option from the System i Emulator Context Menu.

Clicking the  button on the Toolbar again, or using the Clear Selection option from the System i Emulator Context Menu, will un-select all the selected fields.

To copy all the controls marked as selected, you can click on the  icon of the Copy button on the Toolbar, select the Copy Selection option from the Copy button's drop down menu, select the Copy option from the System i Emulator Context Menu or press the Control Key plus either the C or the Insert keys. The selected fields are copied to the Windows Clipboard. A tab character is placed between each field and a Carriage Return character is placed after each row. This means that you can paste the selection into other Infor and 3<sup>rd</sup> party applications (i.e. Microsoft Office Excel) and the layout of the fields will be retained.

To copy just the Edit field controls marked as selected (i.e. any field that can be changed within the System i Emulator UI such as Prompt, Date, Check Box and List controls), you can select the Copy Edit Field Text option from the Toolbar Copy button's drop down menu, or select the Copy Edit Field Text option from the System i Emulator Context Menu. The selected Edit fields are copied to the Windows Clipboard. A tab character is placed between each field but the row formatting is not retained. This means you can paste these fields into another System i Emulator screen (e.g. copy an invoice address to a delivery address; copy the kit list of one item to another).

To paste the current Windows Clipboard content into the screen you can select the  button from the Toolbar. This will direct the paste operation into whichever Edit field has the focus.

**Caution:** If there are no Edit fields or the content of the Windows Clipboard contains something other than text, then selecting the Paste button will not perform any action.

**Caution:** The *Remove CR/LF during Paste* option within the System i Emulator Preferences will alter the behavior of the paste operation within the System i Emulator. See the *Emulator Preferences* section below for more details.

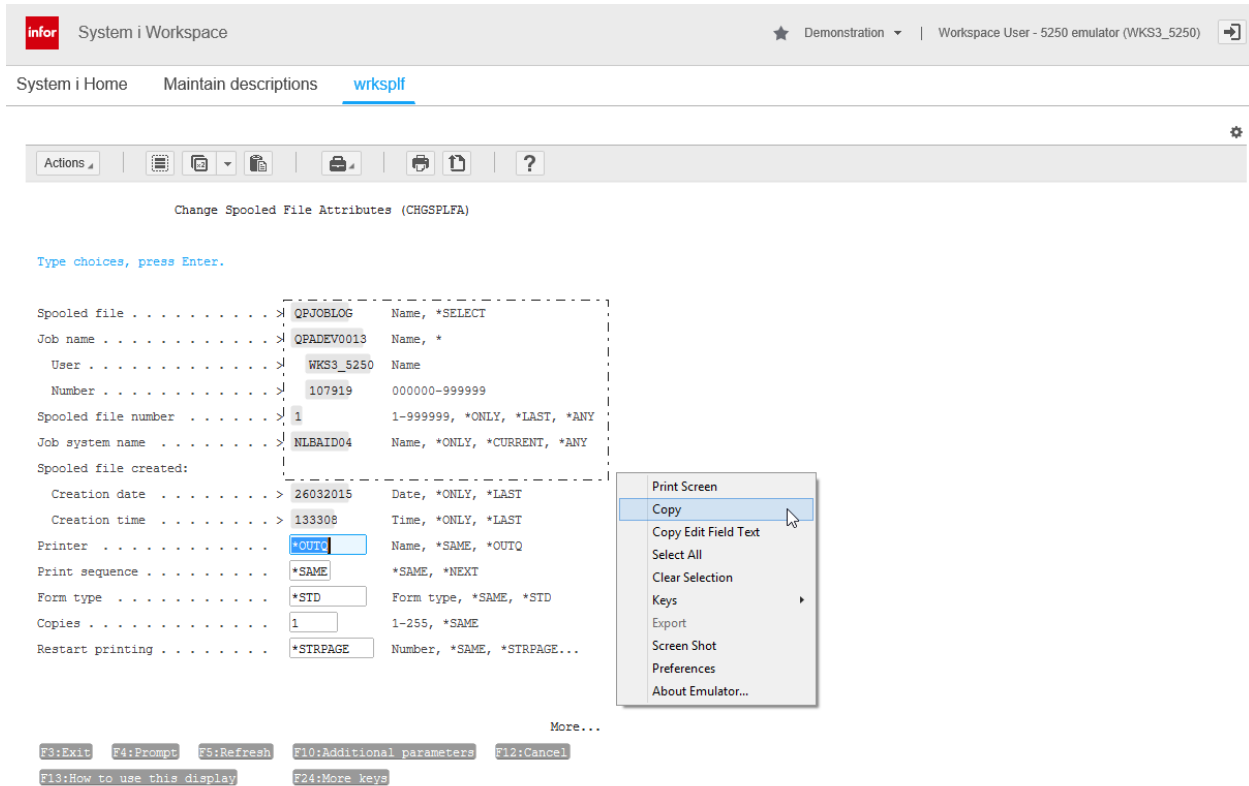
## Using a monospaced font


The following functionality applies when the current screen is rendered using a Monospaced font (e.g. Courier New, Arial Monospaced).

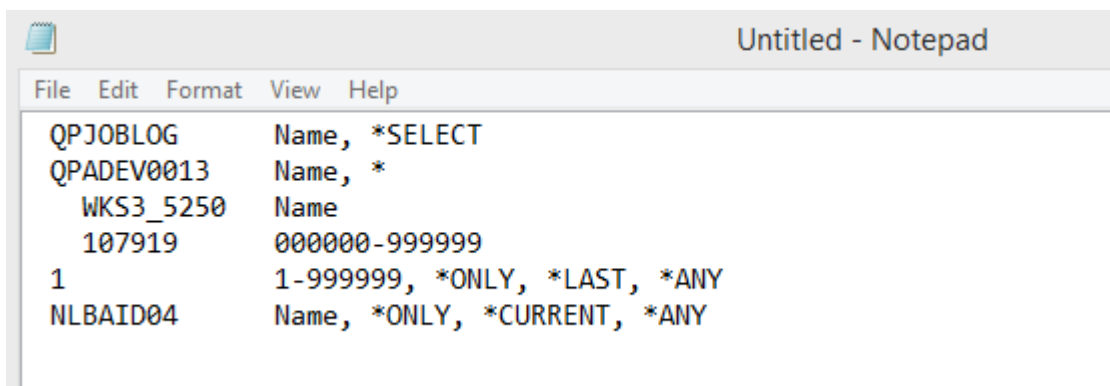
You can click the left mouse button on labels to select them for copying. A dotted line is placed around the label...

Printer . . . . .	<input type="text" value="*OUTQ"/>	Name, *SAME, *OUTQ
Print sequence . . . . .	<input type="text" value="*SAME"/>	*SAME, *NEXT
Form type . . . . .	<input type="text" value="*STD"/>	Form type, *SAME, *STD
Copies . . . . .	<input type="text" value="1"/>	1-255, *SAME
Restart printing . . . . .	<input type="text" value="*STRPAGE"/>	Number, *SAME, *STRPAGE...

You can press and hold the right mouse and drag a dotted line around any area within the panel and then release the mouse button to set the area. The Context Menu will now appear.



Selecting the **Copy** option from the Context Menu, clicking on the  icon of the Copy button on the Toolbar, or selecting the Copy Selection option from the Copy button's drop down menu will copy all the text in the dotted area in a formatted block, for example a copy of the above text would look like this...



Alternatively, if you wish to copy just the content of the Edit fields, you can select the area of the screen (or use Select All)...

## Kit List Maintenance 5008

Item: 5008      Conditioner all hair types 225ml

Component item	Description	Qty.off
5002	Suncream Factor 8 226ml Small.	1.00
5003	Total Sun Block Cream 176ml.	3.00
5004	After Sun Moisturiser 300ml.	4.00
5006	Organic Hair Tonic 18x215ml	7.00

Exit Previous

- Print Screen
- Copy
- Copy Edit Field Text
- Select All
- Clear Selection
- Keys
- Export
- Screen Shot
- Preferences
- About Emulator...

Then select the Copy Edit Field Text option from the System i Emulator Context Menu or select the Copy Edit Field Text option from the Toolbar Copy button's drop down menu, to store just the Edit field content into the Windows Clipboard, for example a copy of the above text would look like this in Excel...

	A	B	C	D	E	F	G	H	I
1	5002	1	5003	3	5004	4	5006	7	

The structure/layout of the edit fields is not maintained into the clipboard. This is so that the content can be replayed into the same screen by pasting into the first empty edit field...



## Kit List Maintenance 5008

Actions

Item: 5008
Conditioner all hair types 225ml

Component item	Description	Qty.off
5002	Suncream Factor 8 226ml Small.	1.00
5003	Total Sun Block Cream 176ml.	3.00
5004	After Sun Moisturiser 300ml.	4.00
5006	Organic Hair Tonic 18x215ml	7.00
5002		1.00
5003		3.00
5004		4.00
5006		7.00

Exit
Previous

You can use the Clear Selection option from the System i Emulator Context Menu to remove the dotted area and clear the selection.

## In-panel navigation

When there are edit fields on a panel, the current focused control (i.e. where any keyboard input will be sent) will contain the cursor and be colored with a blue frame with a light blue background, for example:

Customer:

If the field has no content, a bar-style cursor will be shown within the field. If the field has content, initially, it will be highlighted, for example:

Customer:

Pressing any alphanumeric or symbol key will cause the highlighted text to be cleared. Pressing cursor left/right will remove the selection.

Focused Command buttons will be highlighted with a darker grey background and a blue highlight border, for example:



You can navigate between controls on the panel by either selecting them using the mouse or using the Tab key. Pressing the Tab key will move to the next focusable field or button. Pressing the Shift and Tab keys together will move the focus to the previous focusable control or button.

You can also use the up/down arrow keys to move to the next focusable field above/below the current one.

On some screens, such as those containing sub-files that hold more data than can be displayed, you can press the page up/down keys to display the previous/next set of data. The mouse wheel can also be used to page up/down. Turn the wheel clockwise to page down, and anti-clockwise to page up.

## Command buttons

The command buttons are shown at the bottom of the panel and are used to perform actions within the task. The action is shown within the button label.



The command buttons are the same options displayed within the Actions Menu button within the Toolbar, for example:

Credit Manager Enquiry GC01

Actions

Exit (F3)

Contras (F5)

1stCont (F9)

Diary (F10)

Open items (F13)

All items (F14)

Pay history (F15)

Transaction (F16)

More keys (F24)

Account: GC01

Debtor days: 2114

Days sales outstanding:

Average days to pay: 110

Average days slow: 80

Overdue days: 2168

Balance: 801340.89-

YTD Net sales: 57706.84

YTD Net credits: 222536.03-

YTD Cash: 30187.50-

YTD Discount: 1126.00-

Highest O/S: 2/02/11 93414.08

Last payment: 18/03/15 1000.00-

Last sale: 12/03/15 1000.00

Statement: 31/07/13 1426601.10-

Interest: .00

Dunning: 0/00/00 .00

AR Items: 809531.72-

Orders alloc.or desp.+ 1597886.25

Collection documents + 8190.83

Total outstanding . = 796545.36

Credit limit: 10000000000.00

Available credit: 9999203454.64

Performance: Z Performance Indicator Z

YTD Net sales: 57706.84

YTD Net credits: 222536.03-

YTD Cash: 30187.50-

YTD Discount: 1126.00-

Highest O/S: 2/02/11 93414.08

Last payment: 18/03/15 1000.00-

Last sale: 12/03/15 1000.00

Statement: 31/07/13 1426601.10-

Interest: .00

Dunning: 0/00/00 .00

Exit

Contras

1stCont

Diary

Open items

All items

Pay history

Transaction

More keys

When a button has the focus, you can press either the Space key to activate it. Press Tab or Shift + Tab to move off the button to the next focusable control.

Command buttons will have function key shortcuts associated with them, but are hidden by default.

**Caution:** If you want the function key shortcuts to be displayed on the buttons, speak to your Administrator to enable this functionality.

Function keys with a number above 12 can be accessed by using the Shift key. E.g. F13 can be accessed using Shift + F1, F14 using Shift + F2 and so on.

Pressing the F1 function key will typically open the help for the current screen, if the Help files are installed on your System i Workspace server (see Application Help section below).

## The edit control

The edit control allows the user to input alpha-numeric and symbol data into the system. Users familiar with Microsoft Windows will also be familiar with these controls but for terminal emulation users, there are some useful extended features.

The current text position is represented by a vertical bar cursor. Any input will be appended or inserted at the current cursor position. If, when the control is first selected or focused, it has content, then the content will be highlighted (reverse text).

Account:  Reeves Chemist's.








Currency:

Period:  External reference:

Pressing an alphanumeric or symbol key will delete the text and replace it with the new value. Pressing Delete or Backspace will clear the highlighted text. You can also highlight all, or part, of the text using either the mouse or using the Shift + left/right arrow keys.

The Edit control has an associated context menu (in Microsoft Windows, a context menu is a list of options specific to the current field type). You can access the context menu by either pressing the right mouse button within the control or pressing the Menu button on a Microsoft extended keyboard layout, for example:

**Credit Manager Enquiry** GC01

Actions       

Account:  Reeves Chemist's.

Debtor days:

Days sales outstanding:

Average days to pay:

Average days slow:

Overdue days:

OS balance :  Not yet due :

0:  -  :

1:  -  :

2:  -  :

3:  -  :

4:  -  :

5:  +  :

6:  +  :

Overdue balance :

Doubtful balance :

AP Items:

desp.+

ents +

ing . =

it limit:

credit:

rmance Indicator Z

sales:

credits:

Cash:

count:

Highest OS :

93414.08

Last payment:

1000.00-

Last sale :

1000.00

Statement :

1426601.10-

Interest :

Dunning :

.00

Exit Contrs 1stCont Diary Open items All items Pay history Transaction More keys

The Edit control context menu content will change depending on your Microsoft Windows settings/features. The common options are...

Function	Shortcut	Action
Undo	Control + Z	Undo the last edit action
Cut	Control + X	Remove the highlighted text from the control and place it in the Microsoft Windows clipboard.
Copy	Control + C	Take the highlighted text from the control and place it in the Microsoft Windows clipboard.
Paste	Control + V or Shift + Insert	Take the content of the Microsoft Windows clipboard and place it within the edit field (text may be truncated and any formatting lost).
<b>Caution:</b> The <i>Remove CR/LF during Paste</i> option within the System i Emulator Preferences will alter the behavior of the paste operation within the System i Emulator. See the <i>Emulator Preferences</i> section below for more details.		
Delete	Delete	Clear the current text

Some Edit controls will only accept numeric data. These fields are often right-justified (i.e. the text flows from the right of the control), for example:

Stock->purchase conv:   
 Issue->stock conv:

Negative numeric values can be entered into numeric edit fields. The minus sign can be placed at the right-side of the field, for example:

Value:

...or at the left side of the field, for example:

Value:

**Caution:** Some System i application programs will automatically move the minus sign to the right-side of the field after data is sent to the server and re-displayed.

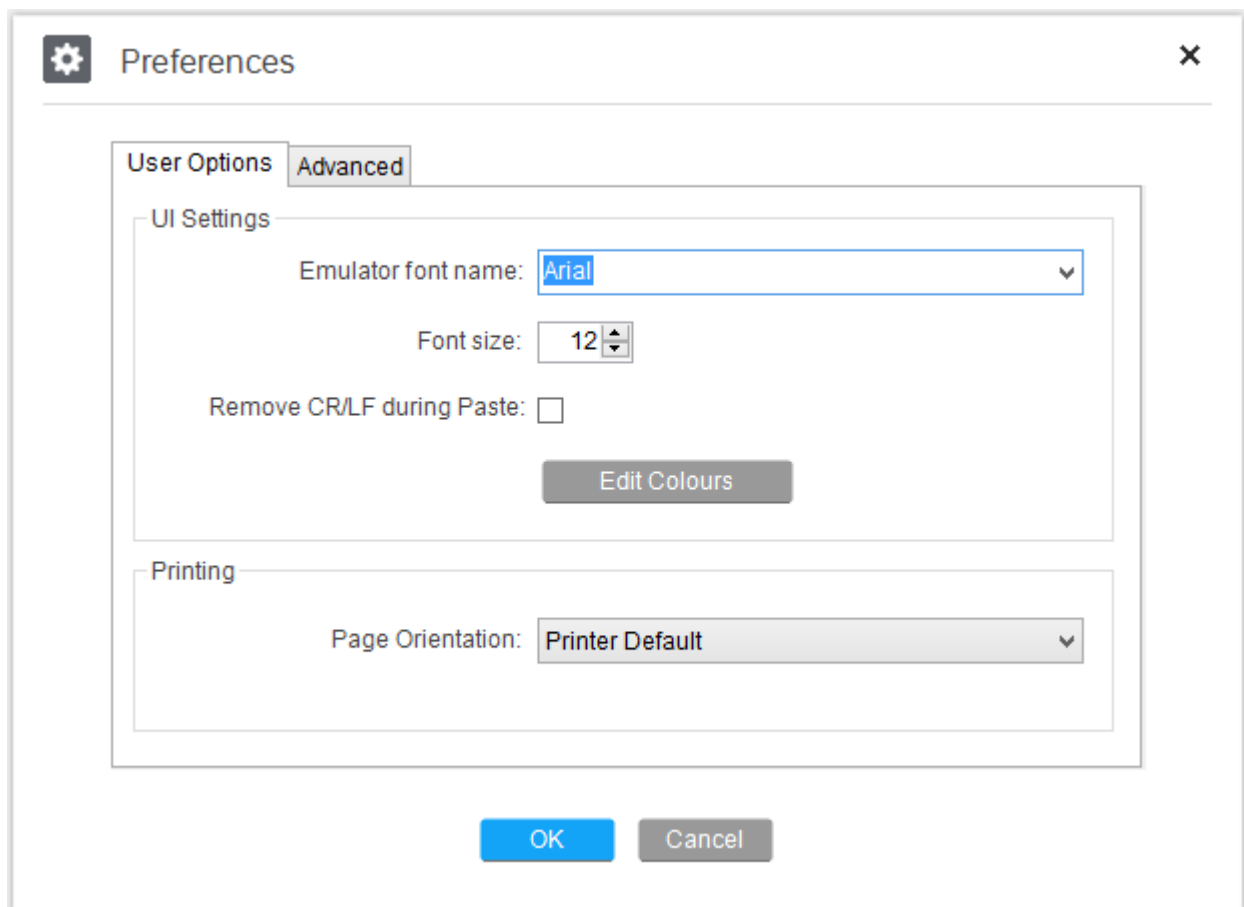
There are some special keys that can be used within Numeric Edit fields that emulate functions which used to be found on System i terminals, for example:

Function	Shortcut	Action
Field Plus	Shift & Numeric +	Perform System i Field Plus behavior on numeric value you have typed and move focus to next field.
Field Minus	Shift & Numeric -	Perform System i Field Minus behavior on numeric value you have typed and move focus to next field.

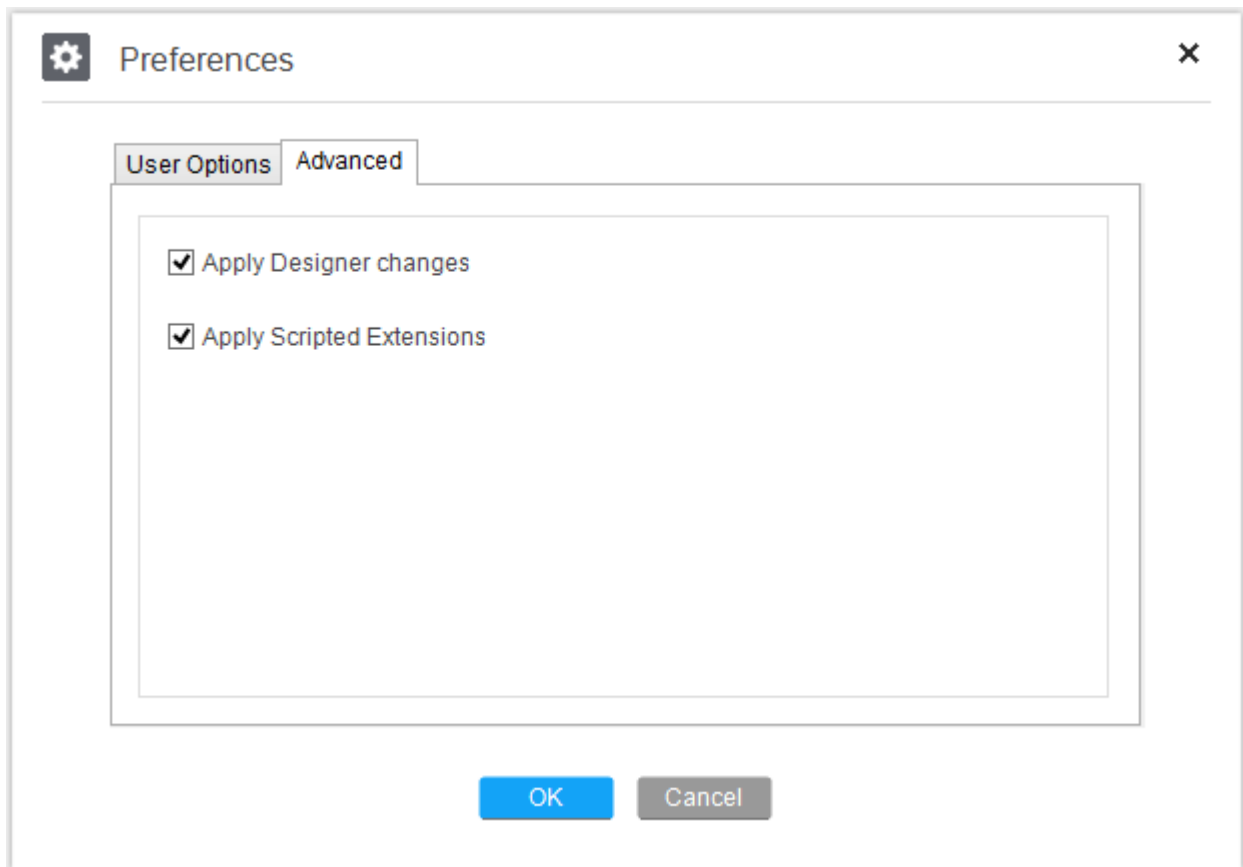
## Emulator preferences

The Preferences dialog is available from the System i Emulator Context Menu or by clicking the ⚙ icon on the task header.

There are two tabs within this dialog; the User Options...



...and the Advanced Options...



The fields in either the User Options or Advanced tabs may be protected (greyed out), when the Preferences setting defined for the profile within the System i Workspace Configuration page, is set to either “Advanced Options Disabled” or “All Options Disabled”.

**Caution:** If the User Tab is protected via the System i Workspace Configuration file, an Administrator can use the 5250 Emulator Administration function to specify defaults or overrides to any of the Preferences fields for either a single, multiple or all users. Please refer to the System i Workspace Installation and Administration Guide for more details on this functionality.

## User options tab

### UI settings

### **Emulator font name**

Either enter the name or select the font from the drop-down list you wish to use within the System i Emulator. The drop-down list will contain only the fonts installed on your Microsoft Windows system that are compatible with the System i Emulator.

**Caution:** If you enter an invalid font name then a base font will be used (usually Courier New).

### **Font size**

Set the System i Emulator font size.

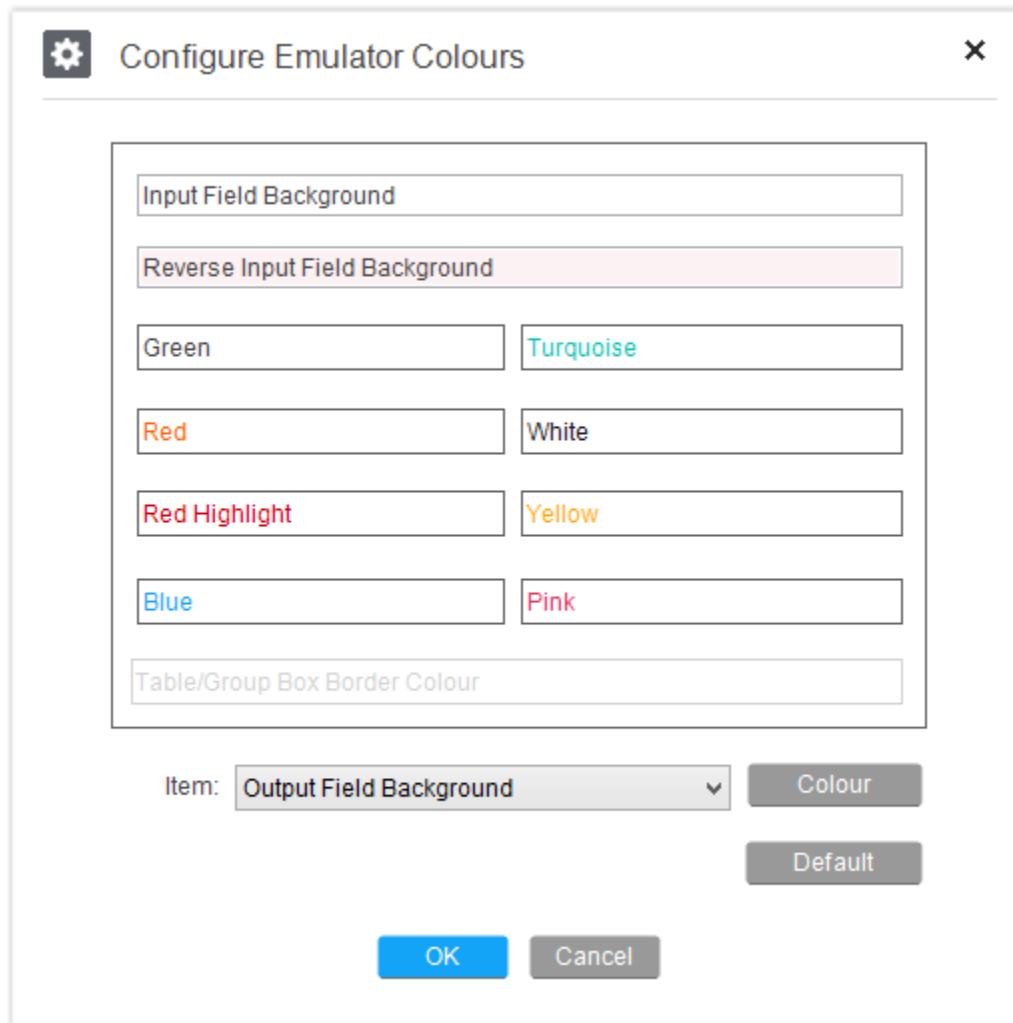
### **Remove CR/LF during Paste**

Determine how Carriage Return (CR) and Line Feed (LF) characters are processed during a Paste operation within the System i Emulator when the Windows Clipboard contains multiple lines of data (i.e. from an external source such as Microsoft Word or Excel). If this option is checked, CRLF character pairs and individual CR and LF characters will be converted to TAB characters so that lines of Clipboard Text data will be sent to consecutive fields within the System i Emulator.

### **Edit Colours**

Show the Configure Emulator Colours dialog which will allow the color settings to be changed.





The top of the dialog contains a simulation of the display showing the various current color assignments so you can see what your changes will look like before applying them to the System i Emulator.

### Item

To select the item whose color you wish to change. You can also click on the item in the simulated screen display.

### Colour

Selecting this will show the standard Microsoft Windows color selection dialog which will allow you to choose the color to assign to the selected item.

### **Default**

Reset all colors to the default palette.

### **OK**

Apply the selected colors to the System i Emulator.

### **Cancel**

Discard any changes.

## Printing

### **Page Orientation**

Choose the page orientation used when the Print Screen option is used.

## Advanced options tab

### **Apply Designer changes**

When this option is ticked, any changes made using the System i Workspace Designer for the current profile will be applied.

**Caution:** You should only un-tick this under instruction from your System Administrator

### **Apply Scripted Extensions**

When this option is ticked, any custom scripts and extensions will be applied.

**Caution:** You should only un-tick this under instruction from your System Administrator

## Preferences dialog buttons

### **OK**

Save and use any changes to the preferences.

**Cancel**


Discard any changes to the preferences.

## Additional designer controls

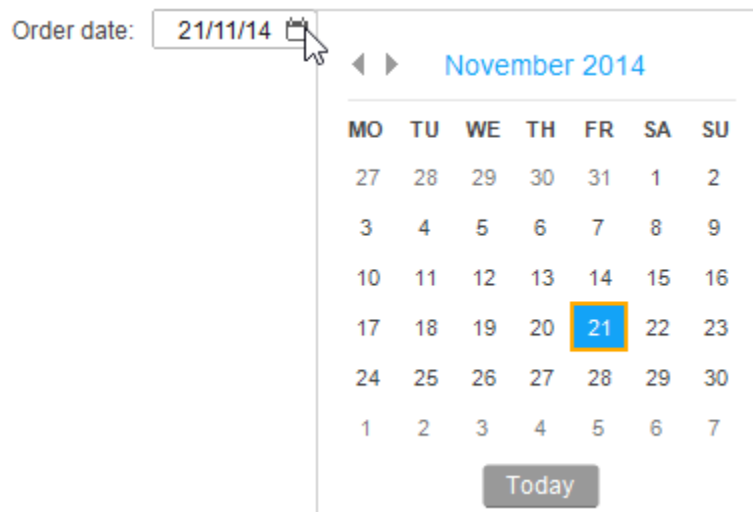
If your System Administrator has enhanced the standard Infor ERP System i application screen using System i Workspace Emulator Designer, you may see some additional controls within the display.

### Date control

When an Edit Field has been defined as a date field, you will see a Date Button appear on its right-hand side, for example:

Order date:  

Select the Date Button with the mouse (or press Alt + Down Arrow when the edit field has focus) to activate the Date-picker Control, for example:



On entry, the date entered in the associated Edit Field will be highlighted with an blue square or, if the date is empty or invalid, the current date. To highlight another date within the current month use the keyboard cursor keys to move the highlight.

To change the month/year, use the arrow buttons or the page/up down keys or the up/down cursor keys.

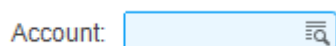
Press the **Today** button to select the current date and close the date control.

To select a date, click on the appropriate day number with the mouse or press the Enter key.

To close the Date-picker Control without selecting a date, press the Escape key.

## Prompt button

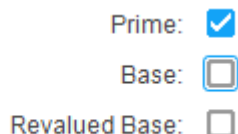
The Prompt Button will usually be positioned to the right-hand side of the Edit Field it is associated with, for example:



Select the Prompt Button with the mouse to activate the prompt action. This will usually cause a popup window to display.

## Checkbox control

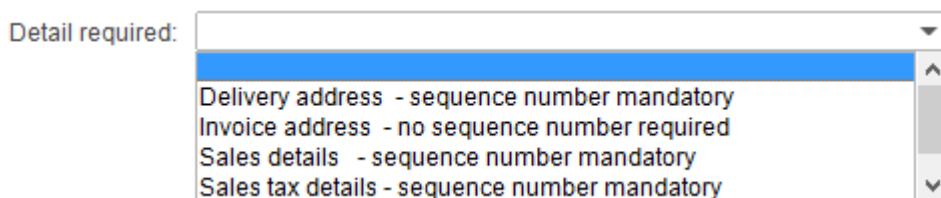
The Checkbox control is used to denote Yes/No or On/Off style options. When the option is set to Off or No, it is empty and when it is set to On or Yes, it contains a tick, for example:



You can either click on the Checkbox to toggle its value or press the **Spacebar** when the field has focus. When the checkbox has the focus, a blue border is placed around it

## Dropdown list control

The Dropdown List control allows you to select from a fixed list of options.



Depending on how the Dropdown List control was configured within Designer, you may or may not manually enter information into the control, but you will always be able to select from the provided

options. You can access the options by clicking on the Dropdown button to the right of the control or, when the Dropdown List field has focus, press the **Alt** plus **Up** or **Down Arrow** keys.

When the Dropdown List is visible, you can use the **Up** and **Down Arrow** keys to select the option or press the first few characters of the option. In the above example, pressing **Sa** would select the *Sales details* option. Press **End** to move to the last item in the list or **Home** to move to the first item in the list.

As you move over an option using the keyboard's **Up** and **Down** arrow keys or typing the first few characters, it is highlighted and the main Dropdown List control is updated with its value.

Pressing **Esc** will close the list with the current item still selected. You can also select the item by clicking on it with the mouse.

## Custom buttons

The panel designer can add buttons to any part of the display. These will appear similar to Command Buttons except that they will not have an associated keyboard shortcut. Selecting the Custom Button will either open a new tab containing a web-page or another System i program or open an external Microsoft Windows program.

See example screen below where a new **Send Mail** was added to the panel.

### Trading Partner Contacts - Maintain

Trading Partner: GC01 000

Name: Reeves Chemist's

Address: 31 Castle Boulevard.  
The Park  
South Nottingham  
Nottingham  
Nottinghamshire

Office: 0221 456 2456

Mobile: 07812 321456

Home: NOT AVAILABLE

Preference: Office










Email address:  
BuyerMG@Reeves.com

Previous Send Mail

## Exportable table data

Your System Administrator may define areas of the display as exportable. When an exportable area has been defined, it will be surrounded by a border, for example:

Trading Partner Contacts - Select GC01 000

Actions         

Trading Partner: GC01 000

Name: Reeves Chemist's.

Address: 31 Castle Boulevard.  
The Park  
South Nottingham  
Nottingham  
Nottinghamshire


Contact Name	Contact Title
<input checked="" type="checkbox"/> Mrs Mavis Gray	Chief Buyer
<input type="checkbox"/> Contact 14	Contact 14
<input type="checkbox"/> Contact 15	Contact 15
<input type="checkbox"/> Contact17	Contact 17
<input type="checkbox"/> Contact 19	Contact 19
<input type="checkbox"/> Contact 20	Contact 20
<input type="checkbox"/> Contact21	Contact 21
<input type="checkbox"/> Contact22	Contact 22

More:

1=Select Contact, 2=Extended Text

Previous

Pressing the right mouse button within the application screen will show the System i Workspace Emulator Context Menu which will include an Export option. Select this option to start the export process. You will be prompted to select the Export Format, for example:



Select Export format

Export to Windows Clipboard

Export to a Microsoft Excel Workbook

Export to a CSV File

Export to a XML File

OK


Cancel

### Export to Windows Clipboard

Copies the table data into the Microsoft Windows Clipboard. Data is formatted as rows of plain text so it can be pasted into other applications.

### Export to a Microsoft Excel Workbook

Open's Microsoft Excel and copies the table data into a new Workbook (does nothing if you do not have Microsoft Excel installed).

The  button within the Toolbar will also activate this function.

### Export to a CSV File

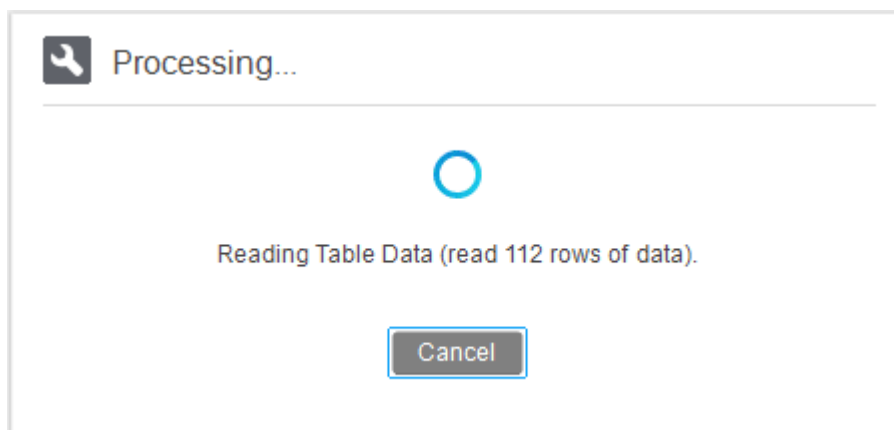
This will export the table data as plain text into a file. Column data is separated by commas. You will be prompted for the location and file name for the CSV file.

### Export to a XML File

This will export the table data as XML into a file. You will be prompted for the location and file name for the XML file.

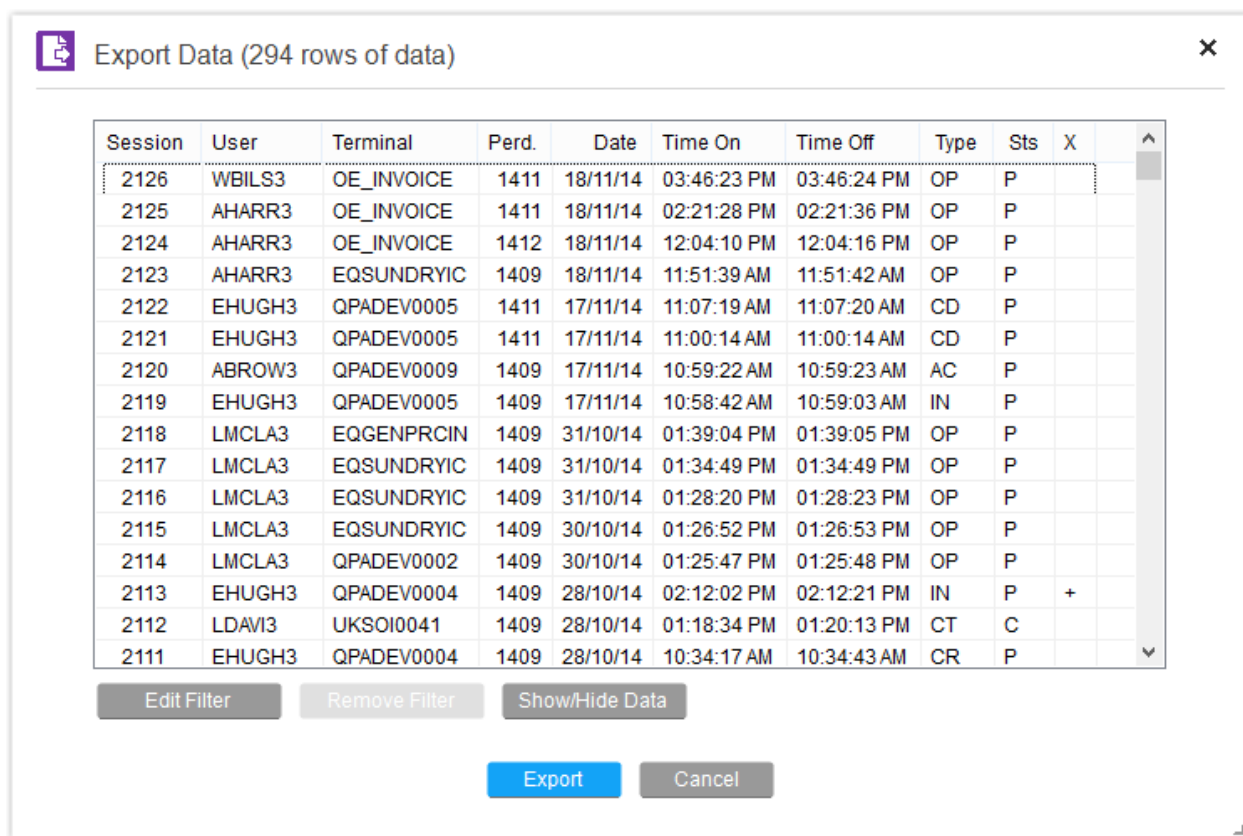
Select **OK** to start the data retrieval process or **Cancel** to abort.

During the data retrieval process, input to the current Infor ERP System i application will be suspended and a progress dialog will be displayed, for example:

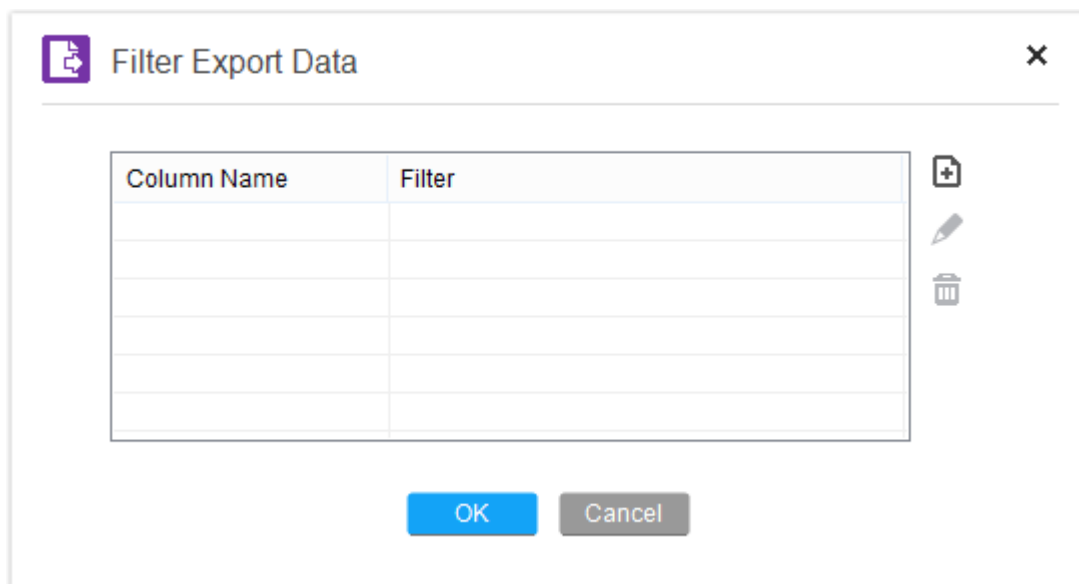


You can select **Cancel** at any time to terminate the data retrieval process.

If one or more row of data was retrieved, the Export Data dialog will be displayed, for example:

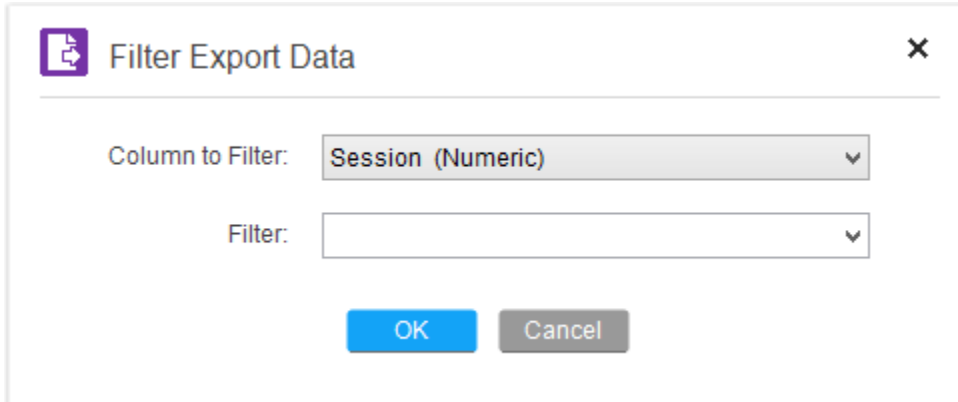


Select the **Edit Filter** button to limit the exported data using the Filter Export Data dialog. Data is filtered by column.



To add a column to the list of filters, press the  button to display this dialog:





**Filter Export Data**

Column to Filter: Session (Numeric) ▼

Filter: ▼

**OK** **Cancel**

### Column to Filter

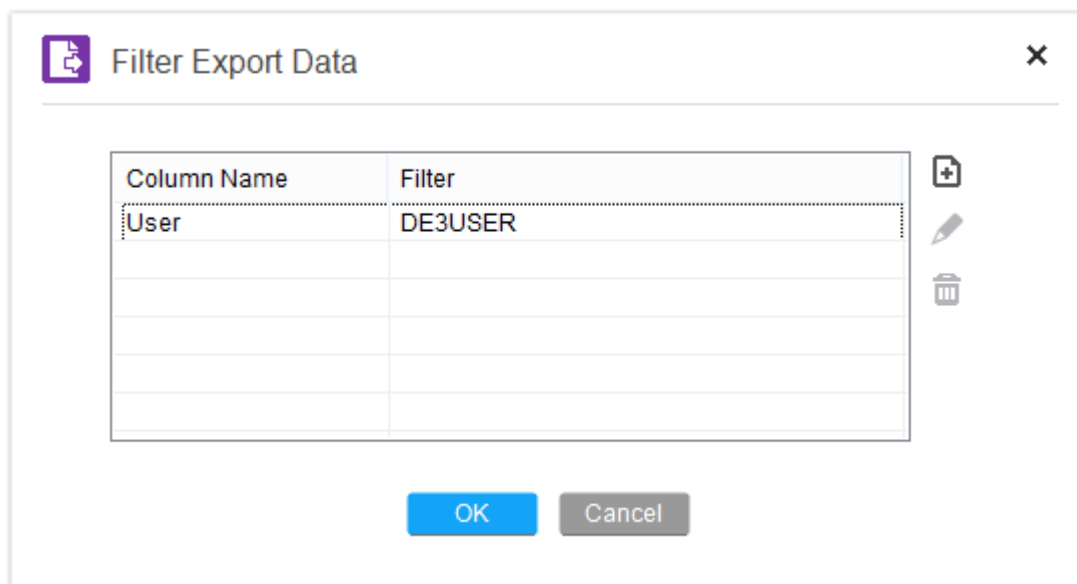
Select the column from the drop-down list that you wish to apply the filter too. The list contains the column headings plus their data type in brackets. There are three data types; Text, Numeric and Date.

### Filter

Enter the filter you wish to apply. The drop-down list will contain all the unique values within the column for you to select from. The filter supports the following formats...

Data Type	Filter	Description
Text/Numeric/Date	NNN	Only show records that match NNN
Text/Numeric/Date	>NNN	Only shows records that is greater than NNN
Text/Numeric/Date	<NNN	Only shows records that is less than NNN
Text	NNN*	Only show records that start with NNN
Text	*NNN	Only show records that end with NNN
Text	*NNN*	Only show records that contain NNN
Numeric	NNN to MMM	Only show records that are equal or greater than NNN and less than or equal to MMM
Date	NNN to MMM	Only show records that lie within the date range NNN to MMM (inclusive)

Select **OK** to select the filter. The Filter Export Data grid will be updated.



To edit a filter, select the filter in the grid and click the button.

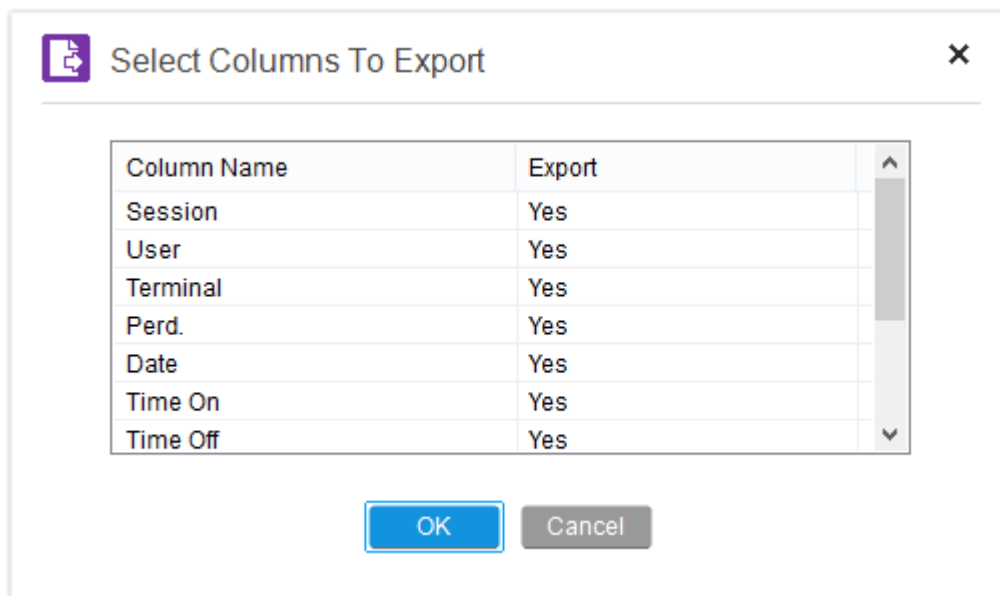
To remove a filter, select the filter in the grid and click the button.

Select **OK** to apply the filter. The Export Dialog will be updated and the **Remove Filter** button will be enabled. Select **Cancel** to discard the filter.

Select the **Remove Filter** button to remove the current filter show all retrieved data.

If you wish to remove columns of data from the export list, select the **Show/Hide Data** button.

To toggle the export status of a column, either double-click the grid row, or right-click on the grid row and select the Disable/Enable Column Export option from the Context Menu.



Click **OK** to apply the change or **Cancel** to discard it.

In the Export Data dialog, select **Export** to send the data to the desired output format or select **Cancel** to abort. If you have selected either CSV or XML formats, you will be prompted for a destination file using the standard Microsoft Windows Save File dialog.

The size and position of the Export Data dialog will be stored against your user-profile and re-used the next time you perform an export.

If you select **Export**, any filter you have defined will also be saved against your user-profile for the named table. The next time you export from the same table, the filter will be re-applied.

## Utilities

The Utilities menu provides a set of useful tools for you to use as part of your day-to-day tasks. The tools will open as a popup window (which we will refer to as a *widget*) within the current tab. By default there are four options within the Utilities menu; My Notes, My Recent Tasks, My Favourites and Screen Shot Viewer.

**Caution:** If your System Administrator has extended the System i Home tab to include additional columns, you will also see them in the Utilities menu.

## My Notes

Selecting My Notes from the Utilities menu will open a widget containing a free-format text edit field, for example:

## Using the System i Emulator

System i Home [Credit manager enquiry](#)

Credit Manager Enquiry GC01

Actions

Account:

Reeves Chemists.

Debtor days: 2114

Days sales outstanding:

Average days to pay: 110

Average days slow: 80

Overdue days: 2168

OS balance: 801340.89-

Not yet due: 262126.41

0: 1 - 30 : 100.00-

2: 31 - 60 : 337.40

3: 61 - 90 : 1535.40

4: 91 - 120 : 3934.02

5: 121 - 150 : 1188.49

6: 151 + : 1070362.61-

Overdue balance: 1063467.30-

Doubtful balance: .00

AR Items: 809531.72-

Orders alloc.or desp.+ 1597886.25

Collection documents + 8190.83

Total outstanding . = 796545.36

Credit limit: 10000000000.00

Available credit: 9999203454.64

Performance: Z Performance Indicator Z

YTD Net sales: 57706.84

YTD Net credits: 222536.03-

YTD Cash: 30187.50-

YTD Discount: 1126.00-

Highest O/S: 2/02/11 93414.08

Last payment: 18/03/15 1000.00-

Last sale: 12/03/15 1000.00

Statement: 31/07/13 1426601.10-

Interest: .

Dunning: 0/00/00 .00

Exit Contrs 1stCont Diary Open items All items Pay history Transaction More keys

My Notes

Text relating to my job...

The text you enter is shared between all tabs, so for, example, if you enter text into the My Notes widget and then switch back to the System i Home tab, you will see the changes there, for example:

System i Home [Credit manager enquiry](#)

Workspace User -

My Recent Tasks

Company: Demonstration (Z1)

Environment: HTS Environmen...

My Favourites

Product Guide

Order entry

Task Search

Search for: All items

with ALL of the words:

with NONE of the words:

results: 50

Task Search Results

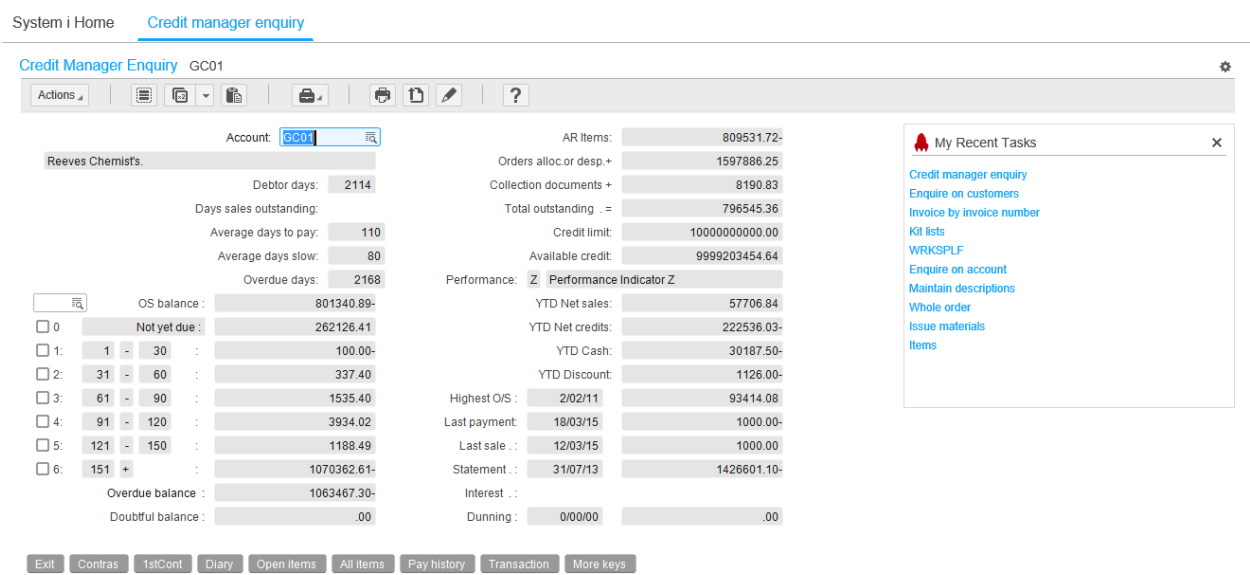
My Notes

Text relating to my job...

Selecting My Notes from the Utilities menu, again, or using the X in the top right of the widget window, will close the widget window.

# My Recent Tasks

Selecting My Recent Tasks from the Utilities menu will open a widget containing a list of your ten previous tasks, for example:



Click on any entry in the list to open that option within a new tab. As you launch tasks from this and other parts of the system, such as the System i Home tab, the list will be updated so that the most recent task is placed at the top of the list.

Selecting My Recent Tasks from the Utilities menu, again, or using the X in the top right of the widget window, will close the widget window.

# My Favourites

Selecting My Favourites from the Utilities menu will open a widget containing a read-only tree view of the folders and tasks you have stored within My Favourites section of the System i Home tab, for example:

System i Home [Credit manager enquiry](#)

**Credit Manager Enquiry** GC01

Account: GC01

Reeves Chemists.

Debtor days: 2114

Days sales outstanding:

Average days to pay: 110

Average days slow: 80

Overdue days: 2168

OS balance: 801340.89-

Not yet due: 262126.41

1: 1 - 30 : 100.00-

2: 31 - 60 : 337.40

3: 61 - 90 : 1535.40

4: 91 - 120 : 3934.02

5: 121 - 150 : 1188.49

6: 151 + : 1070362.61-

Overdue balance: 1063467.30-

Doubtful balance: .00

AR Items: 809531.72-

Orders alloc or desp.+: 1597886.25

Collection documents +: 8190.83

Total outstanding .=: 796545.36

Credit limit: 10000000000.00

Available credit: 9999203454.64

Performance: Z Performance Indicator Z

YTD Net sales: 57706.84

YTD Net credits: 222536.03-

YTD Cash: 30187.50-

YTD Discount: 1126.00-

Highest O/S: 2/02/11 93414.08

Last payment: 18/03/15 1000.00-

Last sale: 12/03/15 1000.00

Statement: 31/07/13 1426601.10-

Interest: .

Dunning: 0/00/00 .00

Exit Contrs 1stCont Diary Open items All items Pay history Transaction More keys

**My Favourites**

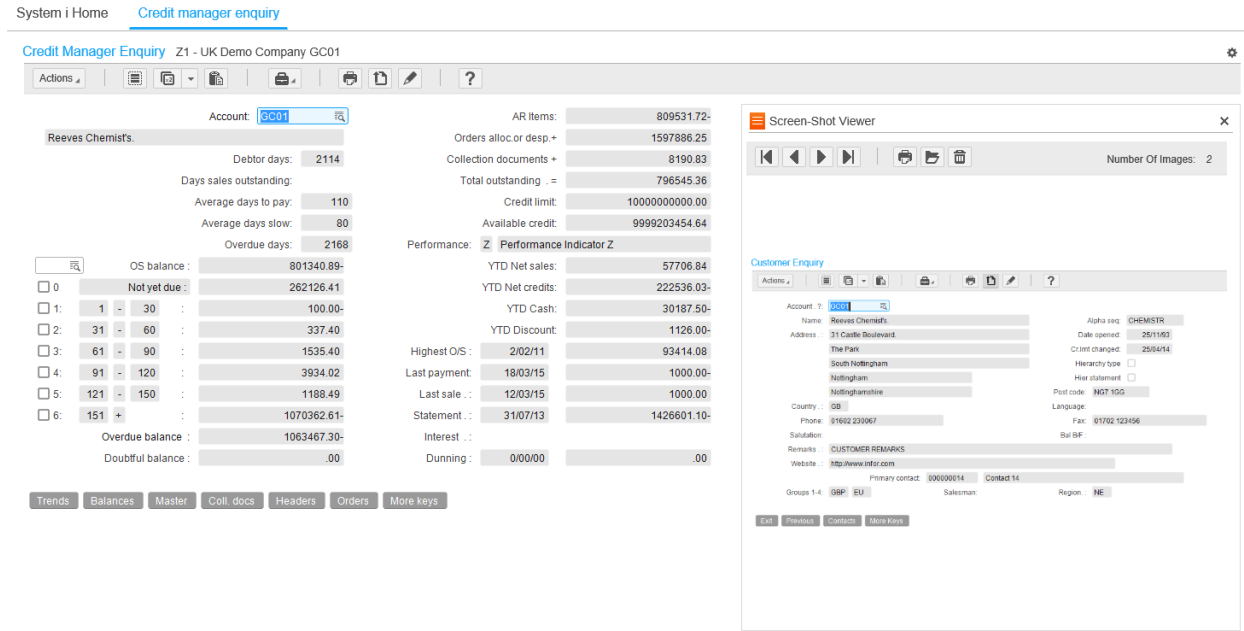
- Product Guide
- System i Commands
  - WRKSPLF
  - WRKUSRJOB
  - WRKMSG
- AOP AO Processing
  - 1 Order entry
  - 2 Order amend
- Company Home Page
- ARE AR Enquiries and Reports


Click on any task entry in the tree view to open that option within a new tab. If you make changes to the My Favourites section within the System i Home tab, the tree view within the widget will be updated to match. You cannot alter the My Favourites content within the widget display.








Selecting My Favourites from the Utilities menu, again, or using the X in the top right of the widget window, will close the widget window.

## Screen Shot Viewer


Selecting Screen-Shot Viewer from the Utilities menu will open a widget containing any screen images that you have “grabbed” in the current System i Workspace session, for example:



When you click the  icon on the toolbar, System i Workspace will take an image of the current active screen or popup window. As well as sending this image to the Microsoft Windows Clipboard for use in other applications, it saves a copy of the image to an internal Screen-Shot Image buffer. The Screen Shot Viewer provides a way to examine and use these images. The Screen Shot Viewer has its own toolbar which contains the following functions...

Icon	Description
	Move to first (earliest) image in the buffer
	Move to previous image in the buffer
	Move to next image in the buffer
	Move to last (newest) image in the buffer
	Print the selected image
	Open the selected image in a popup window outside the System i Workspace interface
	Delete the selected image from the buffer

The Screen-Shot Image buffer holds up to twenty images. If the buffer is full, and you create a new screen shot, the oldest image will be removed from the buffer to make room for the new one.


The  option is especially useful if you have multiple display monitors for your PC, as you can move and expand the popup window containing the image to the 2<sup>nd</sup> monitor and use it to reference common enquiry information.

Selecting Screen Shot Viewer from the Utilities menu again, or using the X in the top right of the widget window, will close the widget window.

## Application help

**Caution:** Application Help requires additional System i Workspace installation and configuration by your System Administrator and may not be available within your enterprise.

**Caution:** Application Help in the System I Emulator is not available for all Infor System i applications.

Selecting the  button from the toolbar will open the Application Help popup window, for example:

System i Home [Credit manager enquiry](#)

Credit Manager Enquiry GC01

Account:  Reeves Chemists.

Debtor days: 2114

Days sales outstanding: 110

Average days to pay: 80

Average days slow: 2168

Overdue days: 2168

OS balance: 801340.89-

Not yet due: 262126.41

1: 1 - 30 : 100.00-

2: 31 - 60 : 337.40

3: 61 - 90 : 1535.40

4: 91 - 120 : 3934.02

5: 121 - 150 : 1188.49

6: 151 + : 1070362.61-

Overdue balance: 1063467.30-

Doubtful balance: .00

AR Items: 809531.72-

Orders alloc. or desp. + 1597886.25

Collection documents + 8190.83

Total outstanding = 796545.36

Credit limit: 10000000000.00

Available credit: 9999203454.64

Performance: Z Performance Indicator Z

YTD Net sales: 57706.84

YTD Net credits: 222536.03-

YTD Cash: 30187.50-

YTD Discount: 1126.00-

Highest O/S: 2/02/11 93414.08

Last payment: 18/03/15 1000.00-

Last sale: 12/03/15 1000.00

Statement: 31/07/13 1426601.10-

Interest: .00

Dunning: 000/00 .00

Exit Contrs 1stCent Diary Open Items All Items Pay history Transaction More keys

Help

**Credit Manager Enquiry Window**

To display this window, enter a customer code and then press Enter on the Credit Manager Enquiry Selection window.

Each quarter of the window displays a different kind of information:

- The top left-hand quarter displays common performance ratios.
- The top right-hand quarter displays credit information.
- The bottom left-hand quarter displays balances, by overdue category.
- The bottom right-hand quarter displays posting information, and details of the status of the account.

**Fields**

**Note:** All the fields described below are output only unless otherwise stated.

**Level**

This field will only be displayed if the customer is a hierarchy customer. It shows the hierarchy level number of the customer.

**Debtor Days**

**Note:** All Credit Manager ratios hold a maximum of 99,999 days

The figure shown here represents the weighted average number of days outstanding for the customer's outstanding debt.

Take all open items for the customer. For each item, multiply the number of days between document and current date by

The content of the help will change as you move through your System i Application screens, for example:



Credit Manager Enquiry    GC01

Actions

Customer Selection: by account code

Search argument:

Alpha sequence field:

Post code 1:

Exclude: Deleted ☐ Inactive ☐ Suspended ☐ Uncertain ☐ Legal ☐ Active ☐

Account	Name & Address	Alpha seq.
<input type="checkbox"/> AA CONTA	aa contact 2	AACONTACT
<input type="checkbox"/> AAACONT	aaacount 521	AAACONT
<input type="checkbox"/> AALAUURA	aalaura no contacts	AALAUURA
<input type="checkbox"/> ACCEPT	Test acceptance 17A Rue de Rivoli Lyons 69018 France	AGNES
<input type="checkbox"/> ACCEPT2	Test acceptance 17A Rue de Rivoli Lyons 69018 France	AGNES
<input type="checkbox"/> ACCEPT3	Test acceptance 17A Rue de Rivoli Lyons 69018 France	AGNES
<input type="checkbox"/> ACHSTD	Reeves Chemists. 31 Castle Boulevard The Park Sout	CHEMISTR
<input type="checkbox"/> ADDRESS	test address line 2 only	TEST1
<input type="checkbox"/> AJTEST	Reeves Chemists. 31 Castle Boulevard The Park Sout	CHEMISTR
<input type="checkbox"/> ALLOC	Test allocation 1 High St	TEST

Previous

Search on bank account

Position to... alpha sequence

Search on IBAN

Alpha search

Position to... account code

Help

Customer Selection by Account Code Pop-up

The customer search facility is available in Accounts Receivable maintenance, processing, report, enquiry and other tasks in which you can select a customer or range of customers.

You can select a customer by bank account, by entering the first character or first few characters of the alpha sequence code, or by entering a known account code.

Your alpha search facility can be customised by the inclusion of two additional fields from the customer details as search [items](#). For example, you can want to select on company name or customer group code or both.

**Note:** The additional alpha search fields are selected on the Maintain Company Profile Alpha Search Details window.


Fields

Search Argument






Enter the first character or first few characters with which to search. Then select **Alpha Search on Customer Name (F17)** to select all customers that meet the criteria. Select **Position to Alpha Sequence (F19)** and the display will begin at the position of the selected [item](#).

Customised Fields

Two fields can be displayed after the Search Argument field. These fields are defined on the Maintain [Company Profile](#) Alpha Search Details window. For example, you could select on the customer name and town if you use your Address 1 line

Selecting the  button from the toolbar again will close the Application Help popup window

The toolbar within the Application Help window contains the following options...

Option	Description
	Go to the Chapter List for this application.
	Go to the previous section.
	Go to the Previous Chapter.
	Go to the Next Chapter.
	Print the current Help page.



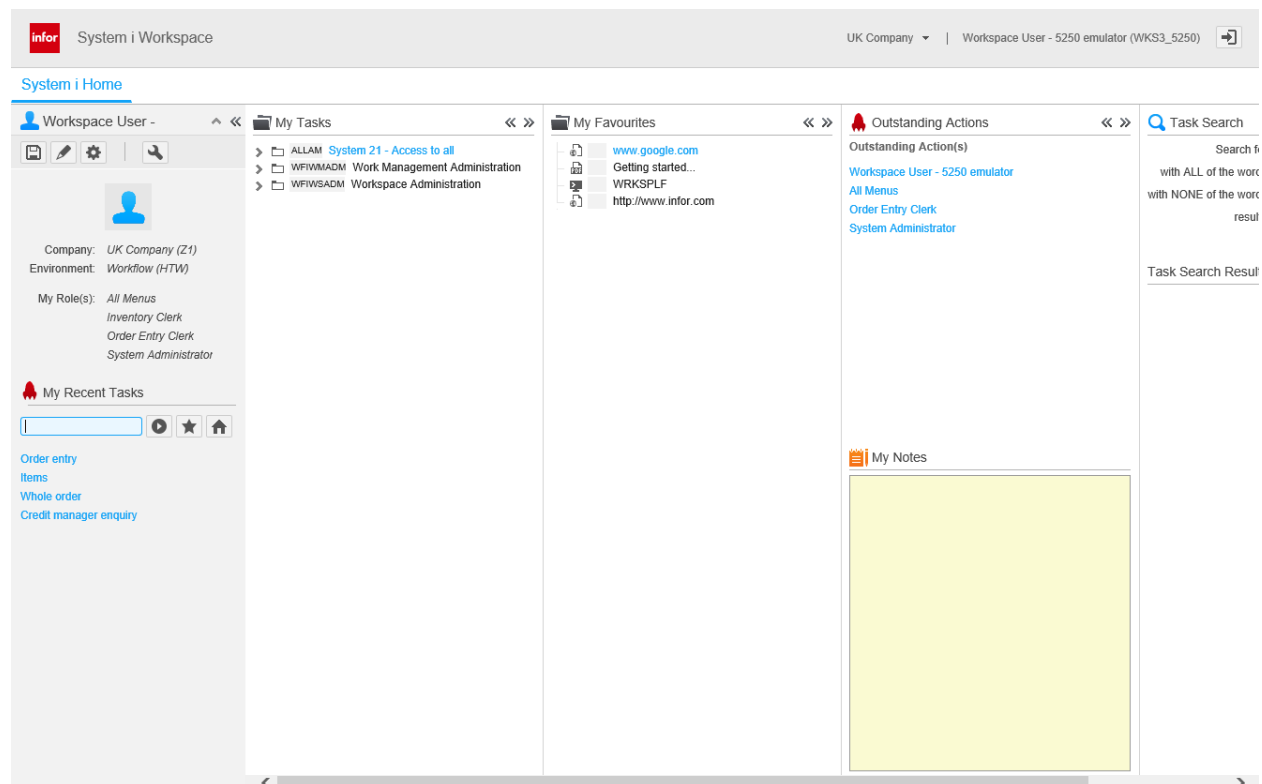
### Introduction

WFi (formerly known as process.connect or Work Management) is the name of the workflow application set that can be used with System i ERP applications. It provides a process-modeling tool to create business processes that can then be activated into the WFi Engine application, which will execute and manage the processes. As part of the process modeling definition, the designer can assign tasks to users and/or roles. These tasks, or Actions, are presented to the recipient through System i Workspace as an Action List. An Action List will contain all the outstanding (pending or work-in-progress) tasks assigned to that role or user.

If WFi is enabled for your current profile and environment, you will see some additional information on your System i Home tab.

# Outstanding actions

When you sign in to a WFi-enabled environment, an additional Outstanding Actions section will be added into the second zone of the System i Home tab, for example:



In the Outstanding Actions box, you will see information about your outstanding actions in one of two styles (depending on how your System Administrator has configured your system). The above style allows you to launch any of your Action Lists that have actions assigned to them, even if those actions are “in-progress” and not accessible. The style below only shows Action Lists (if any) which have accessible actions against them, along with a count of the actions pending.

When new actions arrive for one of your Action Lists, they will be shown by a star character to the right of the description: E.g.

If you are working inside another tab when a new action arrives, you will see an animated envelope next to the System i Home tab heading to indicate that something has changed on that tab.

# The action list

Regardless of which Outstanding Actions style you are using, when you click on the Role or User name, the Action List for that particular role will be displayed.

System i Workspace
 

★ UK Company | Workspace User - 5250 emulator (WKS3\_5250)

System i Home
[Order Entry Clerk](#)

Maximum Rows: 40

Refresh

Show All Columns

Table Width: 100%

Complete All Selected

SetWIP All Selected

Release All Selected

Unlock All Selected

Trace All Selected

Select	Icon	Status	View	Description	Date and time <sup>*</sup>	Business Object Reference	Business Object Description	Priority	Company
<input type="checkbox"/>		Pending		MA Sent to a Role	08/05/2013 11:12:06	ROLE TEST 2	Sales Order	Medium	Z1
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer	22/07/2013 12:41:46	TOR TEST PROCESS 1	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Work in progress - Richard Sankey - Aurora 3.x		More Than 10	11/12/2013 10:40:22	WFA1017101/1/2	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Pending		More Than 100	02/01/2014 09:30:07	WFA1017101/1/2	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer	24/09/2014 09:32:32	TEST ALERT 3	WFI Example Document	Medium	Z1

The top section of the Action List contains all the configuration and commands that can be carried out against your actions. This is followed by a table containing all the current activities associated with the role/user's Action List.

The **Maximum Rows** option controls the number of Action List activities that will be retrieved and shown within the table.

The **Table Width** option controls how wide the table will be within the tab. Depending on your process data, rows may be two or three lines high because the text has wrapped. Setting this to a higher value will prevent the wrapping of text but may result in a scroll bar appearing to access the data to the right of the table, as shown below.

System i Workspace
 

★ UK Company | Workspace User - 5250 emulator (WKS3\_5250)

System i Home
[Order Entry Clerk](#)

Maximum Rows: 40

Refresh

Show All Columns

Table Width: 200%

Complete All Selected

SetWIP All Selected

Release All Selected

Unlock All Selected

Trace All Selected

Select	Icon	Status	View	Description
<input type="checkbox"/>		Pending		MA Sent to a Role
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer
<input type="checkbox"/>		Work in progress - Richard Sankey - Aurora 3.x		More Than 10
<input type="checkbox"/>		Pending		More Than 100
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer

These values are not applied until the Refresh button is selected.

## Action list data

By default, the Action List contains a set number of columns. These are defined as follows:

Column	Description
Select	This checkbox field is used to put a mark against the activities against which you wish to perform one of the Action List commands (see below). The checkbox in the heading can be used to select all or none Action List entries.
Icon	This is a visual indicator of the status and recipient type of the activity.
Status	This describes whether an activity is Pending or Work-In-Progress.
View	Clicking on this icon will open the associated activity in a new tab. The activity will either be a System i Application or a Manual Activity (see below).
Description	This is the activity's description, as defined in the business process.
Date & Time	This is the date and time at which the activity was last updated.
Business Object Reference	This is the business process defined reference for this activity (e.g. a customer order reference).
Business Object Description	This is the business object (document) with which this activity is associated (e.g. a Sales Order).
Priority	This is the importance of this activity. Values are Urgent, High, Medium and Low. Usually, activities should be tackled in priority order.
Company	This is the System Manager company associated with this activity.

Clicking on a column heading will sort the table based on the data within that column. A double arrow (up or down) is shown in the sorted column to indicate that it is sorted as shown below.

Sort Order	Icon Displayed
Ascending	Date and time ▲
Descending	Date and time ▼

The order of the columns can be altered and columns can be removed (as described the Customizing Action Tracker Queries section below).

**Caution:** The changes will be lost if you close the Action List or open a new Action List from the Outstanding Actions.

## Action list commands

The following commands can be performed against the Action List:

Command	Description
Refresh	This will update the table of activities from your Work Management server
Show All Columns	This will show any columns that you have hidden (see the Customizing Action Tracker Queries section below).

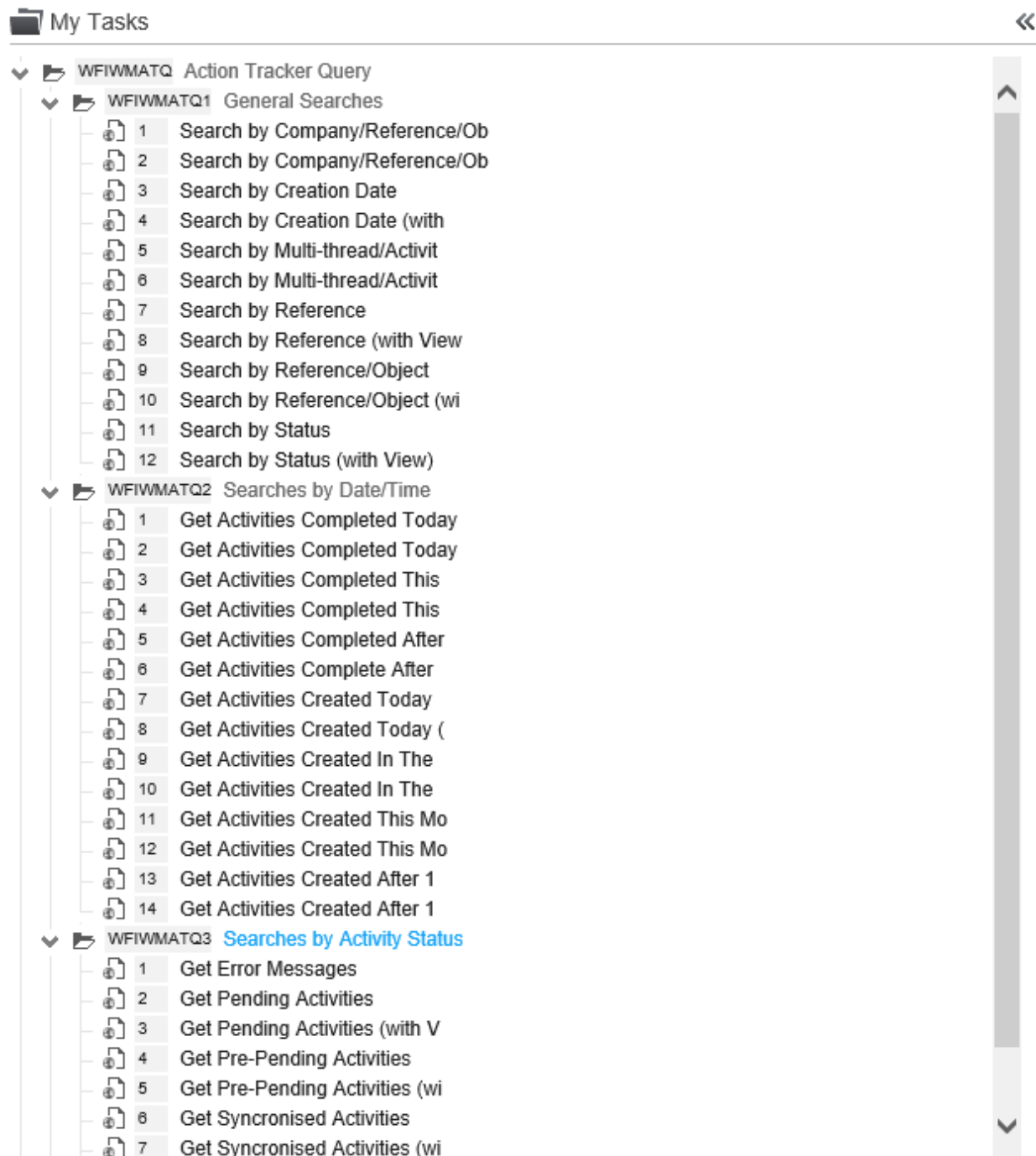
The following commands can only be performed against selected activities within the Action List:

Command	Description
Complete All Selected	Complete all the selected activities, via their default completion route.
Set WIP All Selected	Mark all the selected activities as work-in-progress and lock them to your user profile.
Release All Selected	Release any selected activities that are awaiting synchronization.
Unlock All Selected	Unlock any selected work-in-progress activities.
Trace All Selected	Retrieve all business process data associated with the selected activities.

## Launching other queries

By default, System i Workspace is shipped with a number of pre-set queries (also known as Action Tracker queries) over the process data, for use by advanced WFi users.





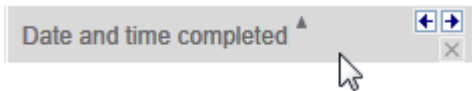
If your System Administrator has authorized you to these tasks, you can find them using your System i Workspace tab. You can either perform a search, or type /WFIWMATQ in the Quick Launch box then press **Enter**.

**Caution:** There is a tool available for your System Administrator to create new queries from scratch if you cannot find a suitable query to meet your business requirements.

Selecting an Action Tracker query will open a new tab containing the associated activity information, as with an Action List.

## Customizing action tracker queries

You can re-arrange (or remove) the columns on any Action List table by using the icons which appear when you move the mouse over a column heading.



The two arrow icons move the column left or right.

The cross icon deletes the column.

To add back a column that you have previously removed (or to add a new column), click on the *Show All Columns* button.

Click on the downward-pointing arrow ▼ to show the search criteria.

System i Workspace

★ UK Company ▼ | Workspace User - 5250 emulator (WKS3\_5250)

System i Home
[Order Entry Clerk](#)

**Action List**

Maximum Rows: 40  
Table Width: 100%

Refresh Show All Columns  
Complete All Selected SetWIP All Selected Release All Selected Unlock All Selected Trace All Selected

Company:

Style Company (Z5)  
UK Company (Z1)

Current roles:

Workspace User - 5250 emulator (WKS3\_5250)  
All Menus (ALLMENUS)  
Inventory Clerk (INVCLERK)  
Order Entry Clerk (OECLERK)  
System Administrator (SYSADMIN)  
IDF user (IDFUSER)  
System Commands (WFISYS)


Date and time effective: Current

Status:

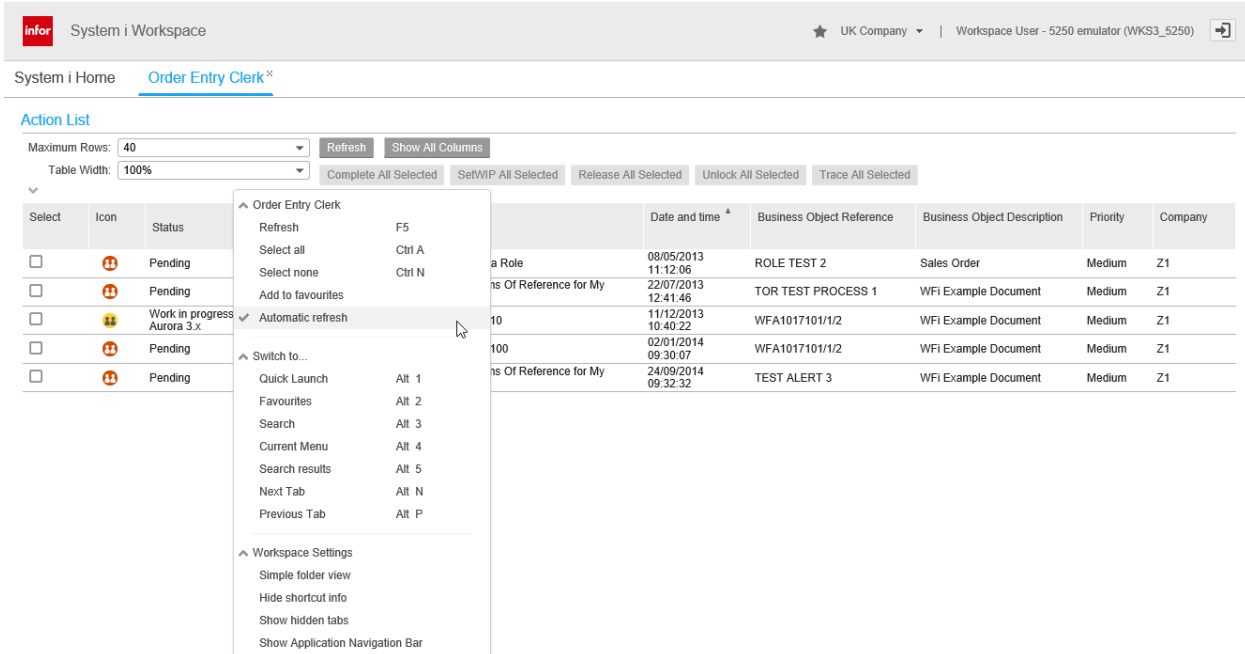
Pending (1)  
Active (2)  
Work in progress (4)

Select	Icon	Status	View	Description	Date and time *	Business Object Reference	Business Object Description	Priority	Company
<input type="checkbox"/>		Pending		MA Sent to a Role	08/05/2013 11:12:06	ROLE TEST 2	Sales Order	Medium	Z1
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer	22/07/2013 12:41:46	TOR TEST PROCESS 1	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Work in progress - Richard Sankey - Aurora 3.x		More Than 10	11/12/2013 10:40:22	WFA1017101/1/2	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Pending		More Than 100	02/01/2014 09:30:07	WFA1017101/1/2	WFI Example Document	Medium	Z1
<input type="checkbox"/>		Pending		Create Terms Of Reference for My Customer	24/09/2014 09:32:32	TEST ALERT 3	WFI Example Document	Medium	Z1

Changing the selected (highlighted) values in the provided lists will alter the data that is brought back from the WFi server. Multiple selections can be made.

Click on the upward-pointing arrow  to hide the search criteria.

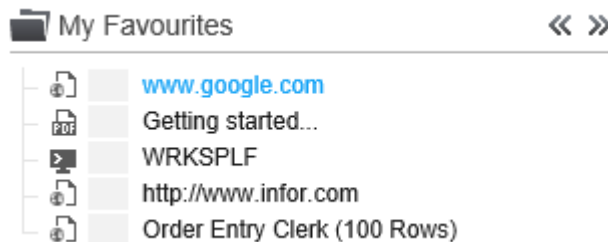
You can make the content of the Action List search refresh every time that you move back to the tab by using the Auto-Refresh option from the Context Menu, for example:



The screenshot shows the Infor System i Workspace interface. The top bar includes the Infor logo, 'System i Workspace', a user selection dropdown (UK Company), and a workspace identifier (Workspace User - 5250 emulator (WKS3\_5250)). Below the top bar, the 'System i Home' and 'Order Entry Clerk' tabs are visible. The 'Action List' section is active, displaying a table with columns: Select, Icon, Status, Date and time, Business Object Reference, Business Object Description, Priority, and Company. A context menu is open over the table, listing options under 'Order Entry Clerk' (Refresh, Select all, Select none, Add to favourites, Automatic refresh, Switch to...) and 'Workspace Settings' (Simple folder view, Hide shortcut info, Show hidden tabs, Show Application Navigation Bar). The 'Automatic refresh' option is highlighted.

The Context Menu option will be checked when enabled, select it again to toggle the function off.

Once you have finished customization, click on Refresh to run the query and then use the Add to Favorites option on the context menu to add your query to your favorites (where you can re-name it to something more appropriate), for example:



The screenshot shows the 'My Favourites' section of the Infor System i Workspace interface. It features a list of favorite items, each with an icon and a name: 'www.google.com', 'Getting started...', 'WRKSPLF', 'http://www.infor.com', and 'Order Entry Clerk (100 Rows)'. The 'Order Entry Clerk (100 Rows)' item is highlighted.

## Manual activities

A Manual Activity is a message that is sent to a User and/or Role containing a specific task that the recipient must perform, for example authorize the purchase of goods.

The message is presented in a similar format to System i Emulator tasks, with a task header, body and command buttons, for example:

The screenshot displays the System i Workspace interface. At the top, the header bar includes the Infor logo, 'System i Workspace', a star icon, 'UK Company', a dropdown arrow, 'Workspace User - 5250 emulator (WKS3\_5250)', and a refresh icon. Below the header, a breadcrumb trail shows 'System i Home' with a folder icon, 'Order Entry Clerk', and 'Create Terms Of Reference for My Customer' with a lock icon. The main content area is titled 'Create Terms Of Reference for My Customer' and contains the following text: 'Please create a new Terms Of Reference document for customer **My Customer** (TOR TEST PROCESS 1 - ).', 'You can find out more about the customer by using the [Enquire On Customers](#) task.', and 'Once you have created the Terms Of Reference document, attach it to this activity and submit it for review.' Below the text are three buttons: 'Submit', 'Set WIP', and 'Close'. At the bottom, there is an 'Attachments' section with a text input field and a file upload icon.

There may also be an optional Attachments section.


The task header will contain the activity title. The lock icon on the task header shows the current usage. When the icon is green, it means you have successfully opened and locked the activity to your user profile; no one else may work on this activity until you have either closed it or completed it.

Within the message body, text in bold is dynamic data specific to the current Role and Business Object (e.g. the Sales Order Number or a Customer Name).

Any blue underlined text denotes a System i Application task that can be clicked on to open it within a new tab.

The message body may also contain single and multi-line text fields; drop down lists, radio buttons and check boxes.

The command buttons provided will vary depending on the Business Process that is being executed but there are two common options;

Button	Description
Set WIP	<p>Set this message as Work-In-Progress (WIP). The activity is assigned to yourself and no other user may work on this activity, even if you close the message.</p> <p>When an activity is set WIP, the icon changes to yellow in the Action List, for example:</p> <p><a href="#">Action List</a></p> 
Close	<p>Close the message. If the activity is not set as WIP, it will be unlocked and returned to the Role/User Action List to be picked up by another user.</p>

## Attachments

The Manual Activity may allow you to view and add Attachments, for example:

System i Home    Order Entry Clerk    [Create Terms Of Reference for My Customer](#)<sup>×</sup>

[Create Terms Of Reference for My Customer](#) 

Please create a new Terms Of Reference document for customer **My Customer** (TOR TEST PROCESS 1 -).

You can find out more about the customer by using the [Enquire On Customers](#) task.

Once you have created the Terms Of Reference document, attach it to this activity and submit it for review.


[Submit](#)   [Close](#)

Attachments


[http://ukshdrsapikey02.infor.com:9081/systemi/static/pdf/Workspace\\_Product\\_Guide.pdf](http://ukshdrsapikey02.infor.com:9081/systemi/static/pdf/Workspace_Product_Guide.pdf) 



Click on the blue underlined link to open any existing attachment within a new tab.

To add a new attachment, enter the URL path to the attachment, such as a PDF, and click the  icon.

**Caution:** You must ensure that the URL syntax is correct and the URL points to a valid document that can be opened within a browser. Local file paths specific to your own PC should not be entered.

You can remove an attachment added manually (e.g. not part of the original Business Process definition) by clicking the  icon next to the attachment link.

### Keyboard shortcuts within System i Workspace

Like many Window applications, System i Workspace can be operated from the keyboard. This chapter provides details of the most useful shortcuts available.

Key Sequence	Description
Alt + 1	Switch focus to Quick Launch box
Alt + 2	Switch focus to Favorites box
Alt + 3	Switch focus to Search box
Alt + 4	Switch focus to Current Menu box
Alt + 5	Switch focus to Search Results box
Alt + N	Switch the display to the active tab to the right of the current tab
Alt + P	Switch the display to the active tab to the left of the current tab
Alt + `	Toggle back to tab that last had the focus

Here are some examples of common operations which use these shortcuts:

Operation	Example Key Sequence
Launch menu option	Press Alt + 1, type 1/OEE and press Enter
Launch web site URL	Press Alt + 1, type <a href="http://www.infor.com">http://www.infor.com</a> and press Enter
Search for a task	Press Alt+3 enter a search phrase and press Enter
Toggle between tasks	Press Alt +1, type 1/OEE and press Enter. When task has loaded, press Alt + 1 and type 1/ARE and press Enter. When task has loaded press Alt + P to switch to 1 <sup>st</sup> task tab, then use Alt + ` to toggle between the two task tabs.





### Available substitution parameters

URLs launched from the Quick Launch box support variable substitution. In other words, you can use dynamic information (such as the current company or username) as part of the URL which you wish to run.

The following substitution parameters are available:

Parameter	Description
company	Company code
company_description	Company description
environment	Environment code
environment_description	Environment description
iseries	System i server name
locale	Locale (for example, en_GB)
pool	Database pool name
profile_description	Profile description
s21lang	User's System Manager language code
user	User name (System i user profile)
user_description	Full user name (System i user profile description)
pass	IBM i token

To use one of these variables as part of a URL, type **%{parameter}** wherever you want the particular value to be substituted.

For example, to run a URL supplying the name of the current System i as the first parameter, you could use the following command:

`http://%{iseries}.infor.com/home`

**Note:** When substituting variables as part of URL parameters, you may prefer to use the uppercase syntax (which forces the variable to be encoded for use as a URL parameter). For example:

`http://somewebsite.com/home?n=%{USER}&c=%{COMPANY}`