SUNGARD PUBLIC SECTOR

NAVIGATION

IFAS
Integrated Financial &
Administrative Solution

NOTICE

SunGard Public Sector Bi-Tech LLC

890 Fortress Street

Chico, CA 95973

Should you wish to make a comment, or if you find an error in the text, please contact us via email:

doc@bi-tech.com

Document Change Log

Version	Date	Change Description
7.9	February 2008	7.9 Version

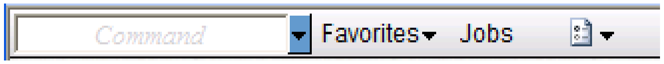
Contents

1 IFAS Navigation

IFAS navigation has three basic components: the menu bar at the top of the screen, the menu tree and command window, and the side bar along the left side of the screen. Menu options will vary from the first navigation page to when you have a screen open.

1.1 Navigation Bar

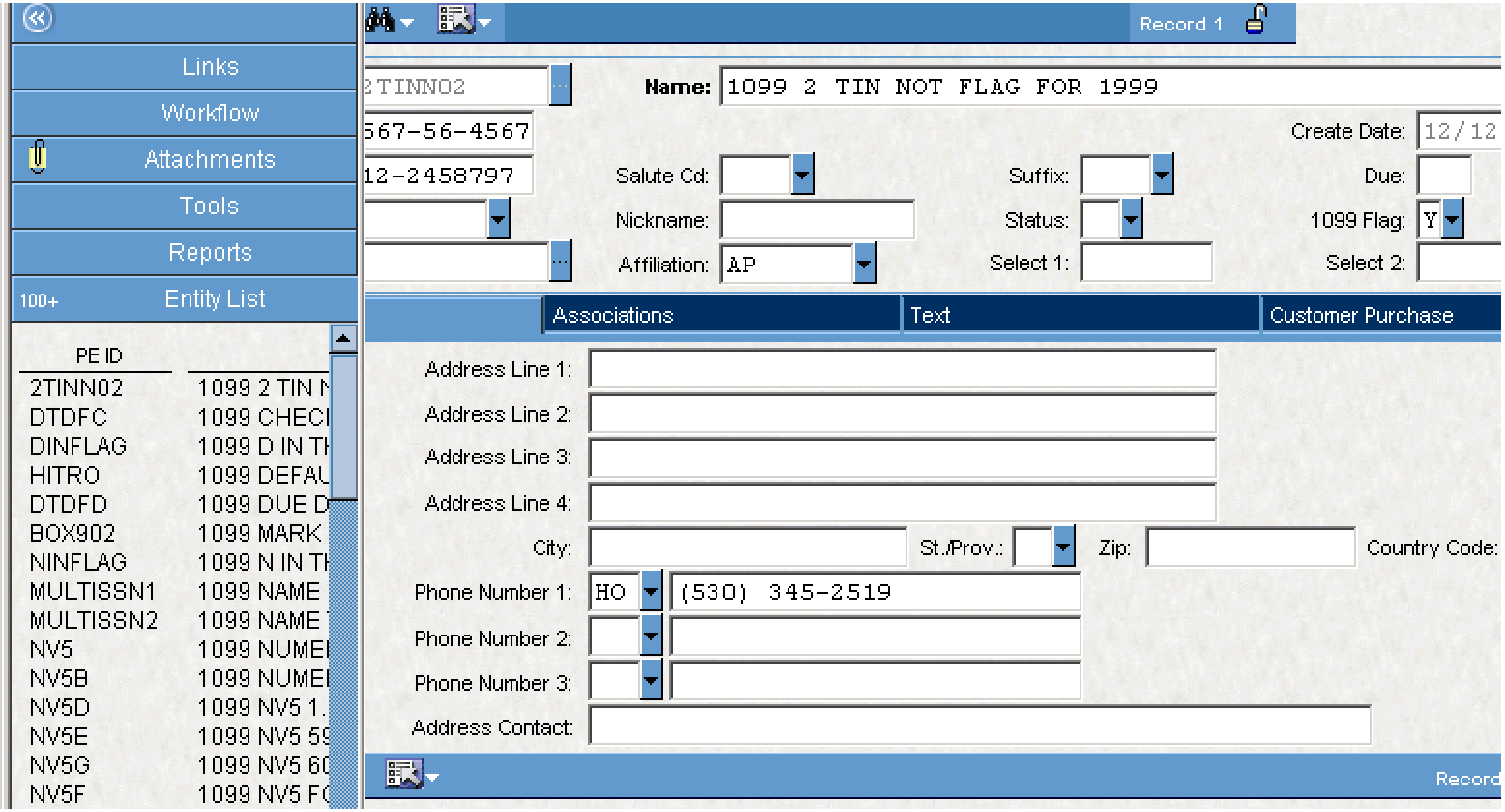
To navigate directly to desired functions or screens, use the Command window shown below. Enter the appropriate mask (e.g., NUUPCD) in the command window and press Enter. For example, to update common code information, enter NUUPCD in the Command window, press Enter, and the screen will be displayed.



1.2 Side Bar

When viewing a mask the navigation side bar appears on the left-hand side of your browser window. Click on the buttons to expand lists. See example for the Attachments option.

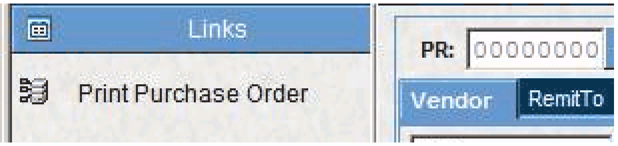
Expanded Attachments List



Side Bar Menu Options

Favorites: Links to 7i screens and IFAS jobs in your current Dashboard favorites folder tree. These will only be shown if the screen has been launched from a Dashboard favorite.

Links: Links to other related 7i screens and related IFAS jobs. Currently, the IFAS Job link is only used in POUPPR (to provide a link to POPO), but we will expand on this use in future releases. The side bar for POUPPR has this "Print Purchase Order" link, as shown below.



Workflow: Allows to access Workflow data.

Attachments: Allows you to view and download attached files. (See the Threaded Notes section below.)

Tools: A list of any additional tools you have available to you.

Reports: A list of available CDD reports that have been attached to this screen.

Entity List: Lists all entities for mask being viewed.

1.3 Accessing Help

You can access Help by using the drop-down Options menu, or by pressing F1 from within any field on any screen to launch a help file.

This first section of navigation options explains the drop-down menus from the navigation bar on the first navigation page in IFAS, prior to opening a screen.

1.4 Favorites

You can access screens with the click of a button by adding them to the Favorites menu. The Favorites menu was designed to provide you with an easy way to return to the screens and launch the IFAS functions that you use regularly. Below is a description of the Favorites options and how they are used.

Pulling down the Favorites Menu allows you to add Personal favorites and Public Favorites.

Adding a Favorite from the pull-down menu will make a new folder appear, nested under Favorites. Be sure to name the folder before adding screens or functions to it. Cntrl+Click+Drag desired functions into the folder you created

You can access screens with the click of a button by adding them to the Favorites menu. The Favorites menu was designed to provide you with an easy way to return to the screens and launch the IFAS functions that you use regularly. Below is a brief description of the Favorites options and how they are used.

The Favorites drop-down includes the following options:

Personal Favorites: A list of all the personal favorite menus created by the current user

[New Personal Favorites]: Use this to create a new menu of personal favorites

Public Favorites: A list of all the public favorite menus (available to all users)

[New Public Favorites]: Use this to create a new menu of public favorites

Note that these "favorite menus" represent an entire tree of favorites (each may contain multiple favorite jobs and nested levels of folders). When you select an option within any of the favorites (in the tree), the following options will be added to the drop-down favorites menu:

New Folder (added within currently selected option/node)

Rename (applies to currently selected option/node)

Delete (applies to currently selected option/node)

Clicking a name in one of the favorite menus (within the drop-down list) will load that menu under the Favorites option of the menu tree. A check mark indicates which favorite menu is loaded. Clicking a "loaded" name will unload that menu. The menus loaded will automatically reload when you launch IFAS.

Be sure to name your new Favorites folder before adding to it. When you create a Favorites menu, it will automatically enter "rename mode" so that you can provide a name for it. After entering the name, press Enter (or click elsewhere on the tree) to save it.

Once your favorite menu exists, you can drag any jobs to it by holding down the control key, clicking on a "terminal node" (a job, a screen, or a report), and dragging it to the desired location (Cntrl+Click+Drag). Similarly, you can drag jobs around within the favorites menu to reorganize it. Changes are automatically saved to the database.

- Dropping an item on a folder will add it to the end of that folder.
- Dropping an item on a job (not a folder) will add the item just before that job.
- Dropping an item in another favorites menu entirely will make a copy instead of a move.

When a job is moved into a Favorites menu, the user responses will go with it. For example, if you have already filled out selection criteria, it will become the default value within the favorite. Within the job, there is a Save Changes button that can be used to alter the default values for that job (this option is only available on jobs within a favorites menu). The defaults are stored within the favorite and will remain unchanged unless you use that button. After dragging jobs into a favorite menu, you may want to rename the jobs so that they make more sense or so they will better describe the default options that were selected. Rename is only available within Favorites menu, not in the standard IFAS options.

1.4.1 The Favorites drop-down includes the following options:

Personal Favorites: A list of all the personal favorite menus created by the current user

[New Personal Favorites]: Use this to create a new menu of personal favorites

Public Favorites: A list of all the public favorite menus (available to all users)

[New Public Favorites]: Use this to create a new menu of public favorites

Note that these "favorite menus" represent an entire tree of favorites (each may contain multiple favorite jobs and nested levels of folders). When you select an option within any of the favorites (in the tree), the following options will be added to the drop-down favorites menu:

New Folder (added within currently selected option/node)

Rename (applies to currently selected option/node)

Delete (applies to currently selected option/node)

Clicking a name in one of the favorite menus (within the drop-down list) will load that menu under the Favorites option of the menu tree. A check mark indicates which favorite menu is loaded. Clicking a "loaded" name will unload that menu. The menus loaded will automatically reload when you launch IFAS.

Be sure to name your new Favorites folder before adding to it. When you create a Favorites menu, it will automatically enter "rename mode" so that you can provide a name for it. After entering the name, press Enter (or click elsewhere on the tree) to save it.

Once your favorite menu exists, you can drag any jobs to it by holding down the control key, clicking on a "terminal node" (a job, a screen, or a report), and dragging it to the desired location (Cntrl+Click+Drag). Similarly, you can drag jobs around within the favorites menu to reorganize it. Changes are automatically saved to the database.

Dropping an item on a folder will add it to the end of that folder.

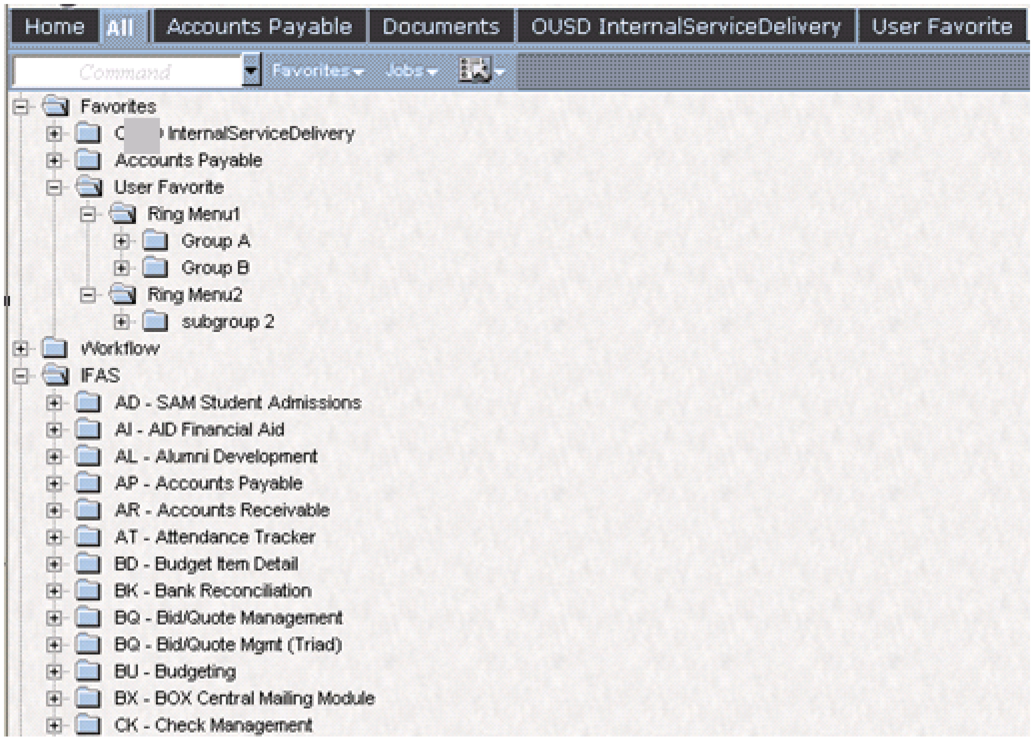
Dropping an item on a job (not a folder) will add the item just before that job.

Dropping an item in another favorites menu entirely will make a copy instead of a move.

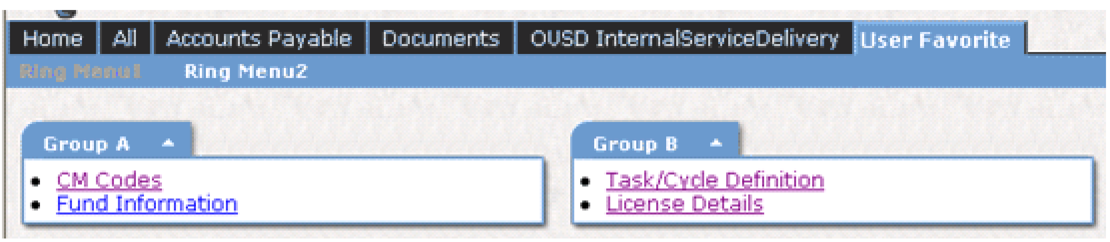
When a job is moved into a Favorites menu, the user responses will go with it. For example, if you have already filled out selection criteria, it will become the default value within the favorite. Within the job, there is a Save Changes button that can be used to alter the default values for that job (this option is only available on jobs within a favorites menu). The defaults are stored within the favorite and will remain unchanged unless you use that button. After dragging jobs into a favorite menu, you may want to rename the jobs so that they make more sense or so they will better describe the default options that were selected. Rename is only available within Favorites menu, not in the standard IFAS options.

1.4.2 Organizing Favorites to show only a subset

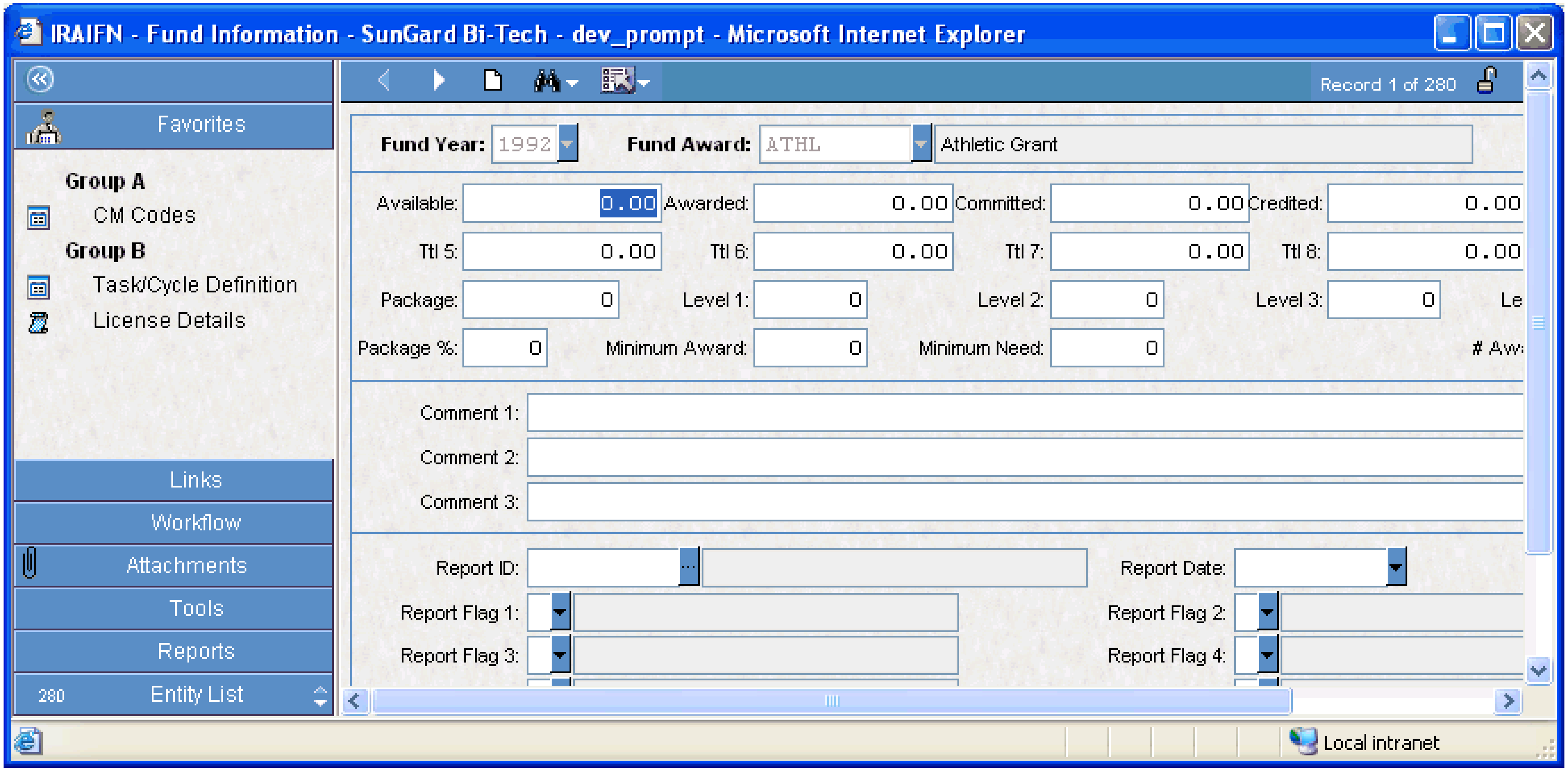
Create Favorite folder in 7i with multiple sub folders as shown in the following screen shot.



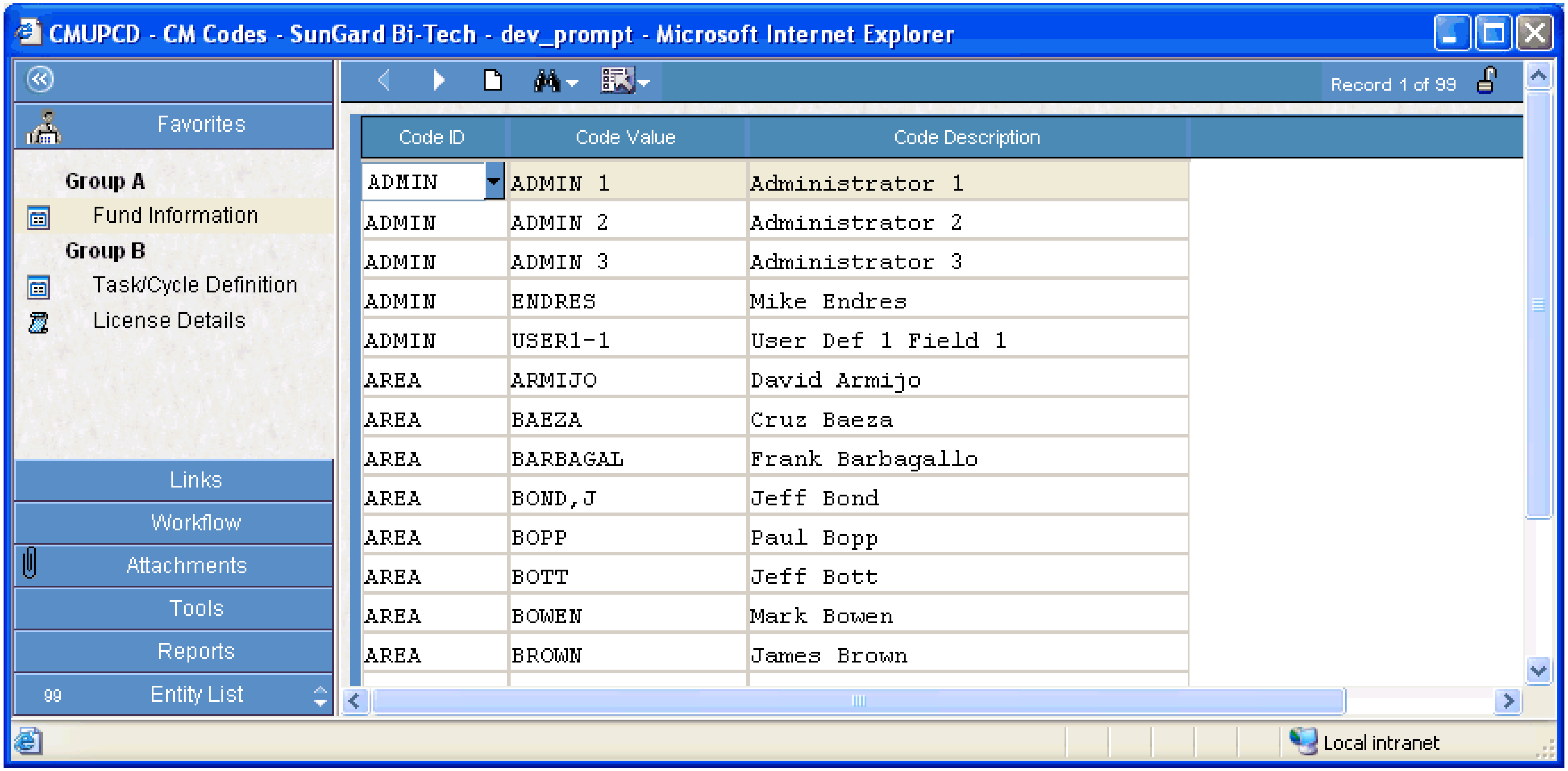
Change to newly created favorite tab and verify subfolders are shown in sub tabs.



Launch one of the 7i screens from the favorites group and verify the favorite side bar shows only the favorite links belong to the current sub folder. (In this example, it should be links belong to 'Ring Menu 1').



Make sure if the screen is launched from the side bar favorites, the subset of favorites are properly shows up in the new screen.



1.5 Jobs

IFAS Jobs represent work that is being done on a user's behalf by the 7i server or the application server. There are several types of jobs, but these are all tracked in the same location and consolidated on the same "Jobs" list. The possible job types are listed below.

Workflow – Jobs processed by the 7i Workflow engine which may be submitted from multiple areas of 7i

Classic Job – Jobs processed by the application server, submitted either through the Home page, the Dashboard, or a classic session

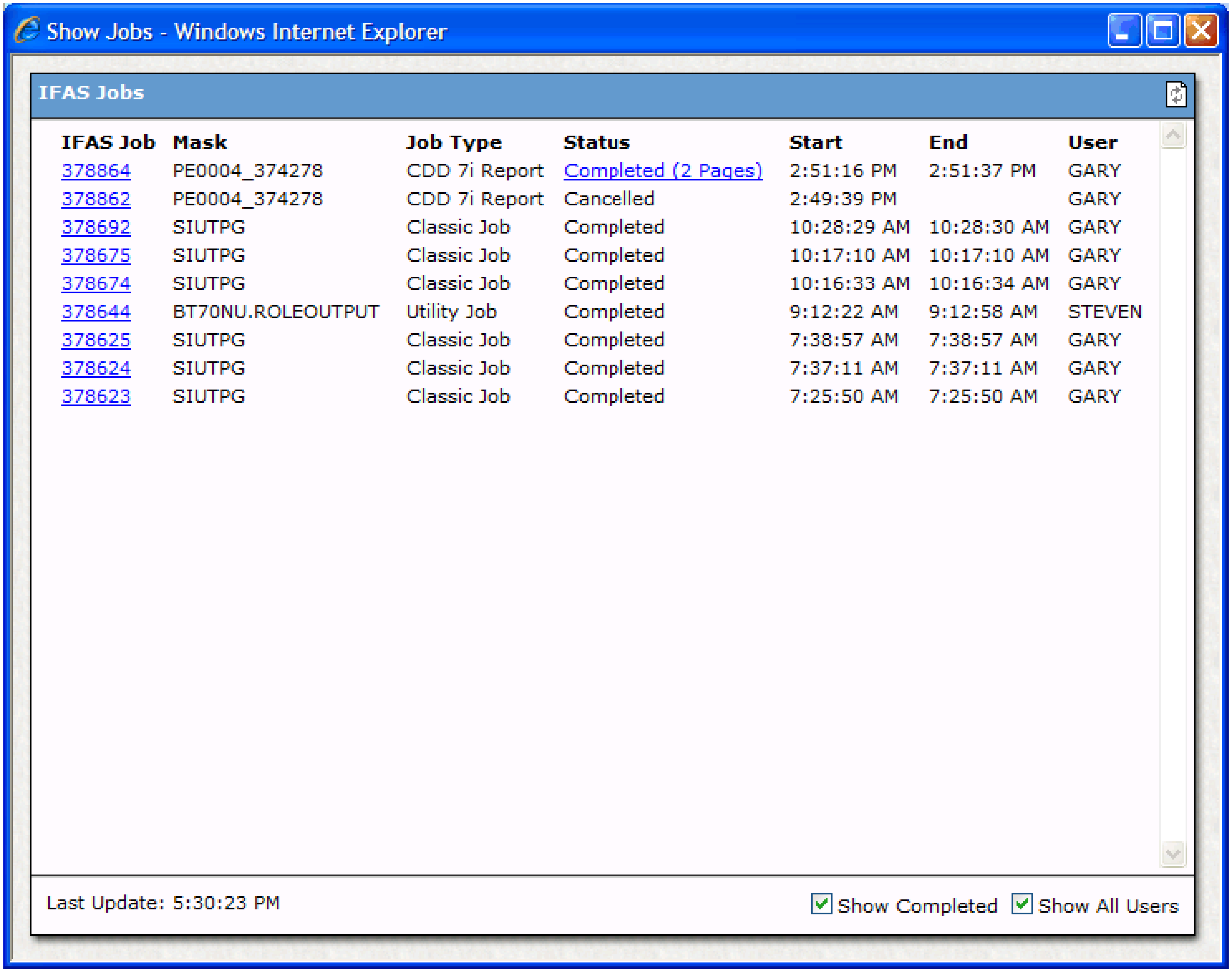
Classic Interactive Job – Jobs run interactively through a classic session (Insight, telnet, or Reflection)

CDD Report – Reports run from CDD installed on a client PC

CDD 7i Report – Reports run through 7i

Tool Execution – Tools requested from the options bar on a 7i screen

Clicking the “Jobs” button on the toolbar will bring up the “IFAS Jobs” page which displays the current status of jobs, reports, and tools being processed by IFAS.

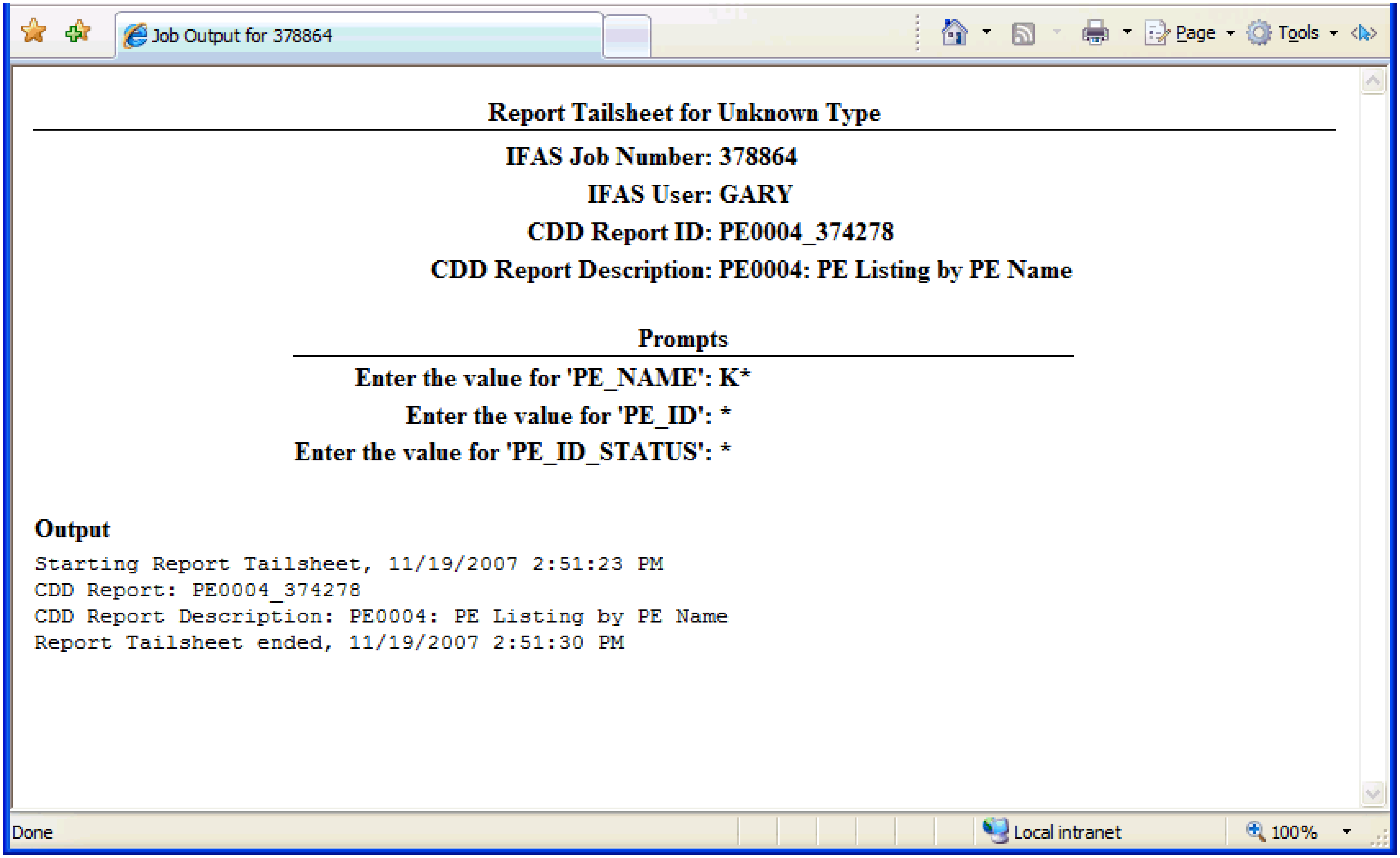


The IFAS Jobs page displays the unique IFAS job number, the mask used to request the job, the type of job, its current status, the start/end times, and the requesting user. In the case of current 7i CDD reports which are still available for viewing, a link to the report output will also be provided.

The page will refresh periodically to display the latest job updates. There is also a “Refresh” button near the upper right corner of the page, which may be used to force an immediate refresh of the job status information.

Initially the jobs page will show current and pending job activity for the current user. If the “Show Completed” option is selected, recently completed jobs will also be shown. If the “Show All Users” option is selected, jobs submitted by all users will be shown.

Clicking on the IFAS Job number will display the "tailsheet" output for the job, if available. The tailsheet is a quick summary of the job request and its results. Typically this information is stored in the Documents Online system. Here is a sample tailsheet for a 7i CDD report:

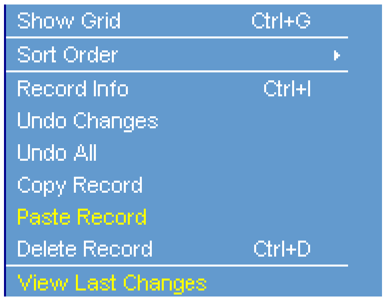


In the case of classic jobs, the "View Tailsheet" option will attempt to contact the application server to obtain the first 100 lines of the tailsheet. Note: This option requires some configuration on the server to ensure that copies of all tailsheets are maintained in a known location.

In the case of Workflow Jobs which are in progress, the “View Tailsheet” option will present the incomplete tailsheet information for the job in progress.

1.6 Options

The Options Menu drop-down allows you to choose from these basic functions:



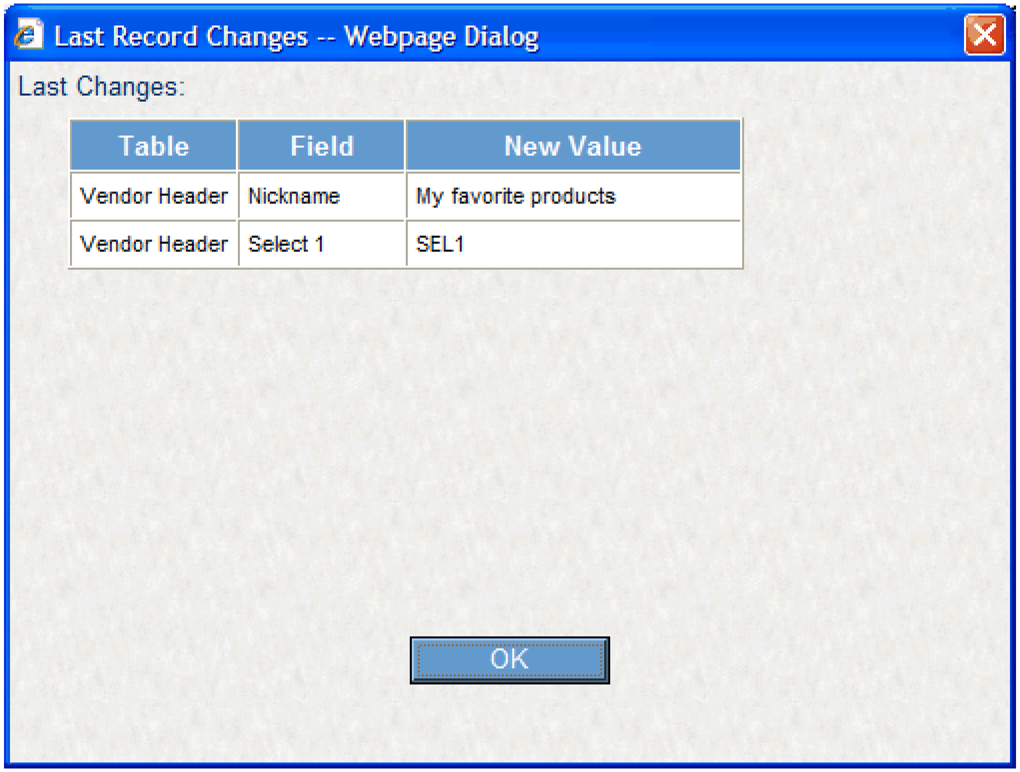
1.6.1 Global Changes

The Global Changes tool allows a set of specific changes to be defined on one record and then applied easily to a set of selected records. This is a matter of showing the system what changes are needed, and then specifying what set of records is to receive those same changes. This tool is available in the Options Menu of most standard 7i screens.

To utilize this feature, first make the desired “Global” changes to a single record on a 7i data entry screen, and save the record. All desired changes must be made as a single update. At this point it is possible to view the specific changes that were last applied, using the View Last Changes feature.

View Last Changes

Selecting "View Last Changes" from the Options Menu will display a list of the most recent set of changes. In this example, the Person/Entity Update screen was used (PEUPPE), and the Vendor Nickname and Select Code 1 were updated.

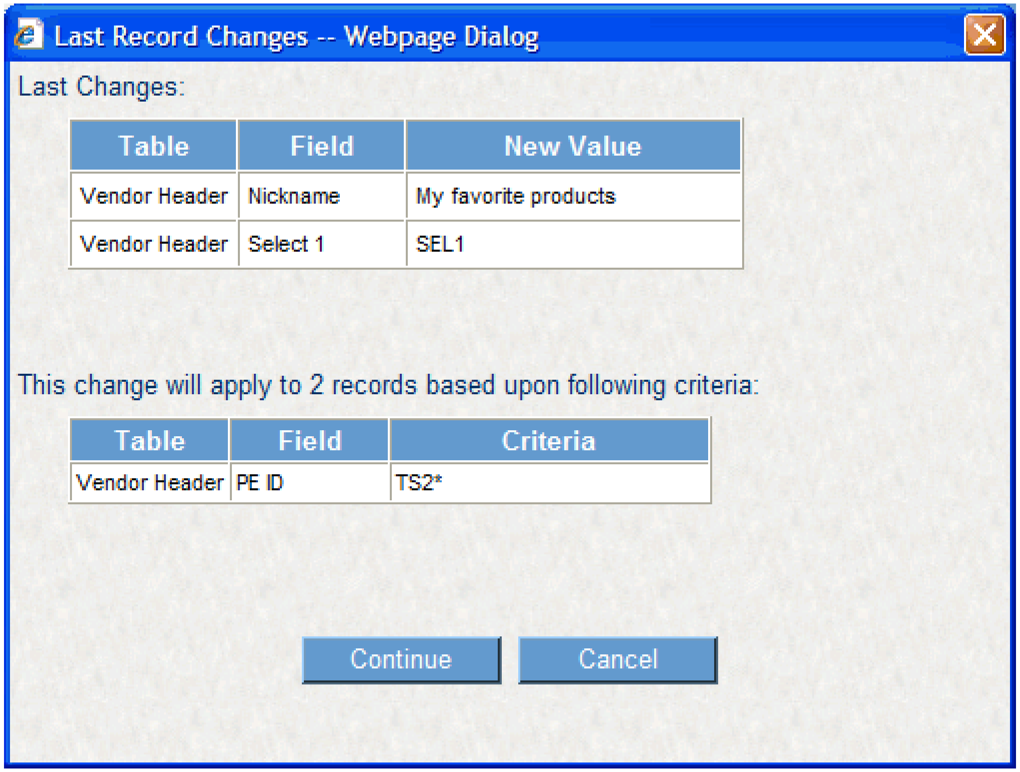


This most recent set of changes can then be applied to a set of selected records. To accomplish this, use "Find mode" to select a set of records, then select the "Repeat Last Changes On Selected Records" option.

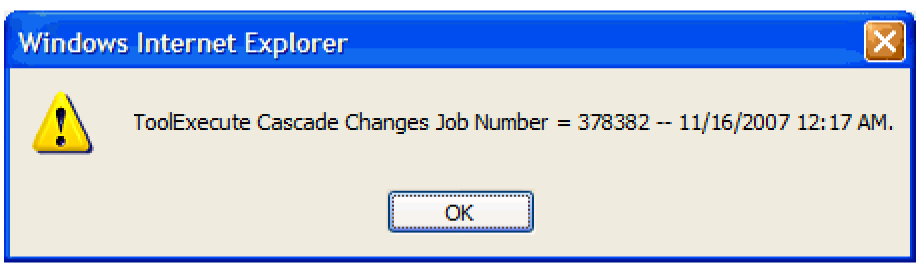
Repeat Last Changes On Selected Records

Selecting this option will apply the most recent set of changes to the entire working set of records, as selected in Find mode. In this example, all PE ID's matching the pattern "TS*" were selected, so the prior changes to the Nickname and Select Code will be applied to the two matching Person/Entity records.

Selecting the "Repeat Last Change" option will present a confirmation dialog similar to the following:



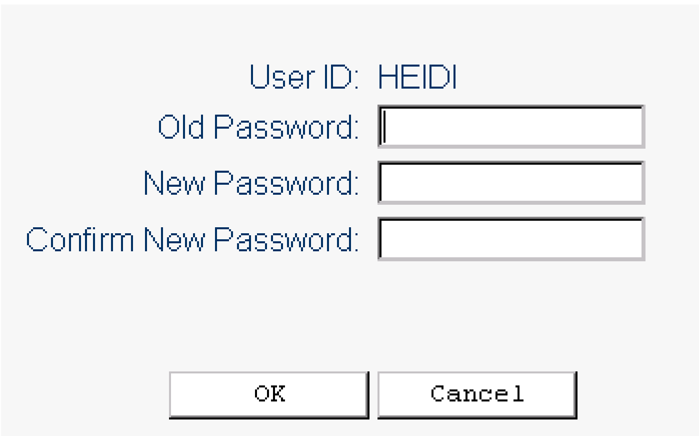
This confirmation is provided in order to verify the specific changes that will be made, and the criteria and count of the records that will be selected. If the changes and the selected record set are correct, click the "Continue" button to apply the changes. This tool will run on the 7i server. A confirmation of the request will appear, similar to this:



The status of this process can be confirmed by locating the tool request on the 7i “Jobs” page, by job number. Once this background process has completed, the requested changes can be seen by re-querying the relevant records.

1.7 Change Password

This provides you with the opportunity to change your password.

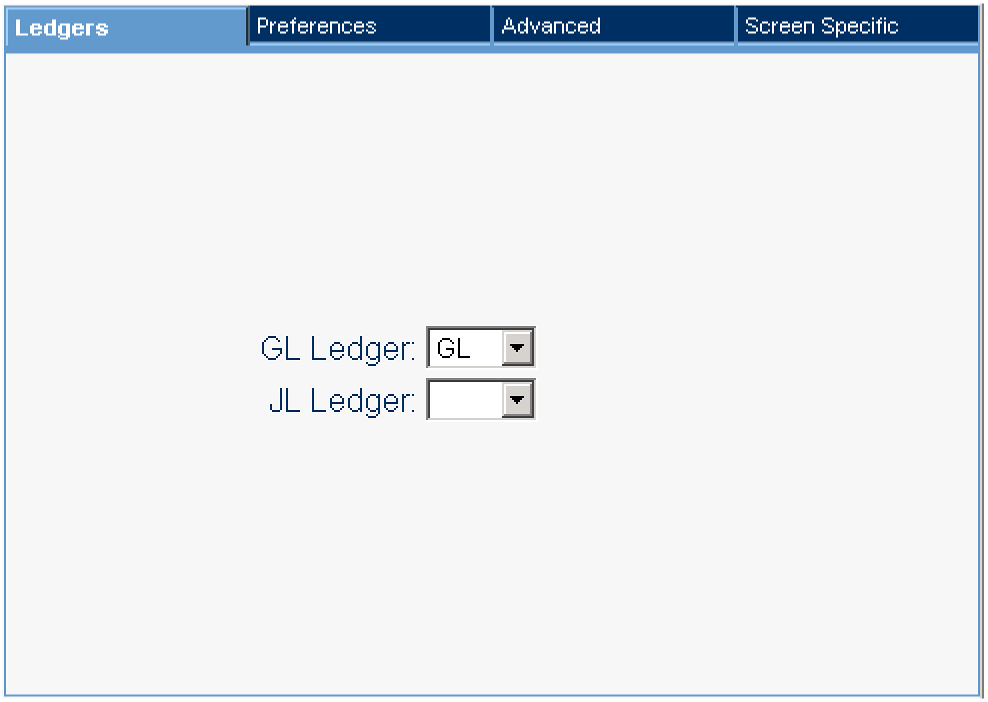


1.8 Settings

The Settings option allows you to make changes to 7i. There are four tabs under the Settings option: Ledgers, Preferences, Advanced, and Screen Specific. When you have finished making your selections, click the Apply Changes button at the bottom of the screen.

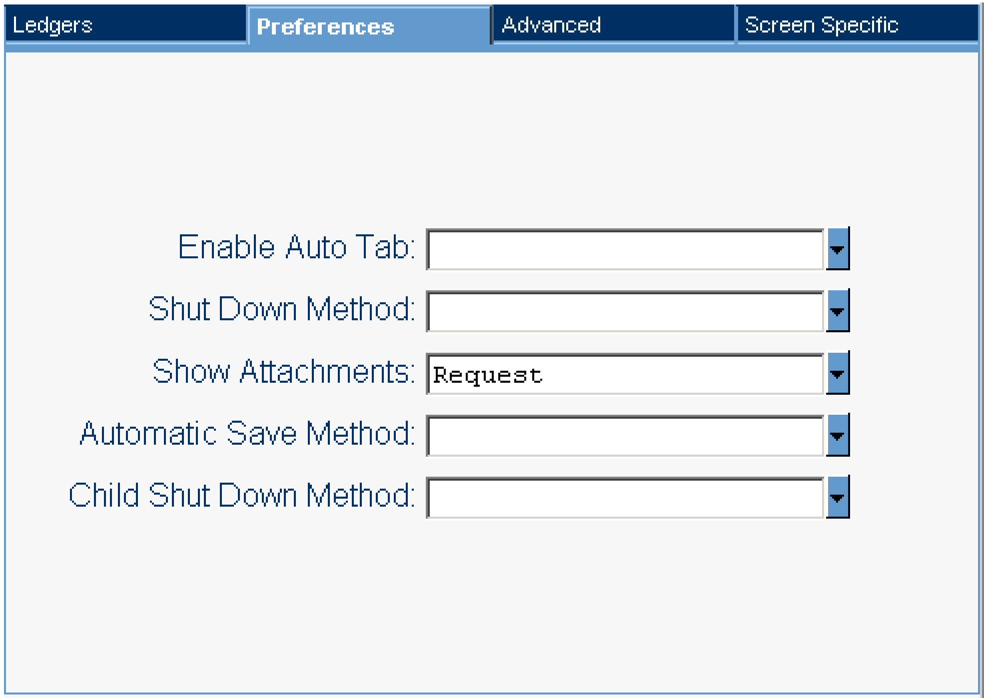
1.9 Options Ledgers Tab

From this tab you can select codes for GL Ledger, and JL Ledger.



1.10 Options Preferences Tab

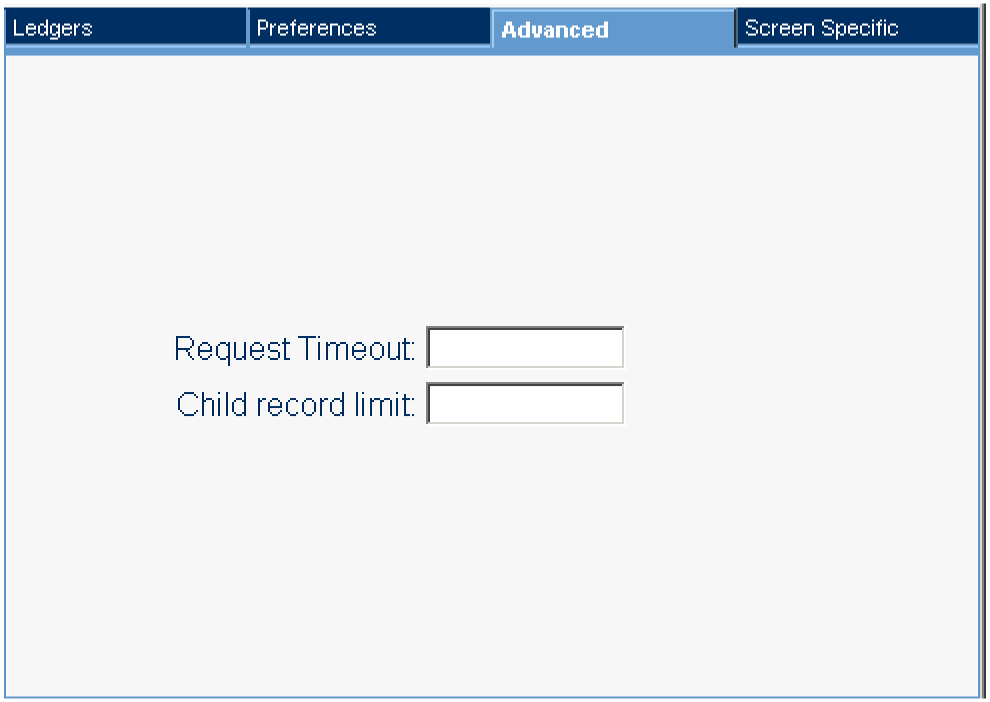
From this tab you can make changes to the preference displayed in the graphic.



The timeout value is the amount of time the system has to retrieve information before the system enters ‘timeout’ mode. You may use this option to define a timeout value (in seconds) greater than the default, which is 30 seconds.

Use the Child record limit box to limit the number of child records that may be opened at one time. This will help avoid system overload that may occur when opening many child records at one time.

1.11 Options Advanced Tab

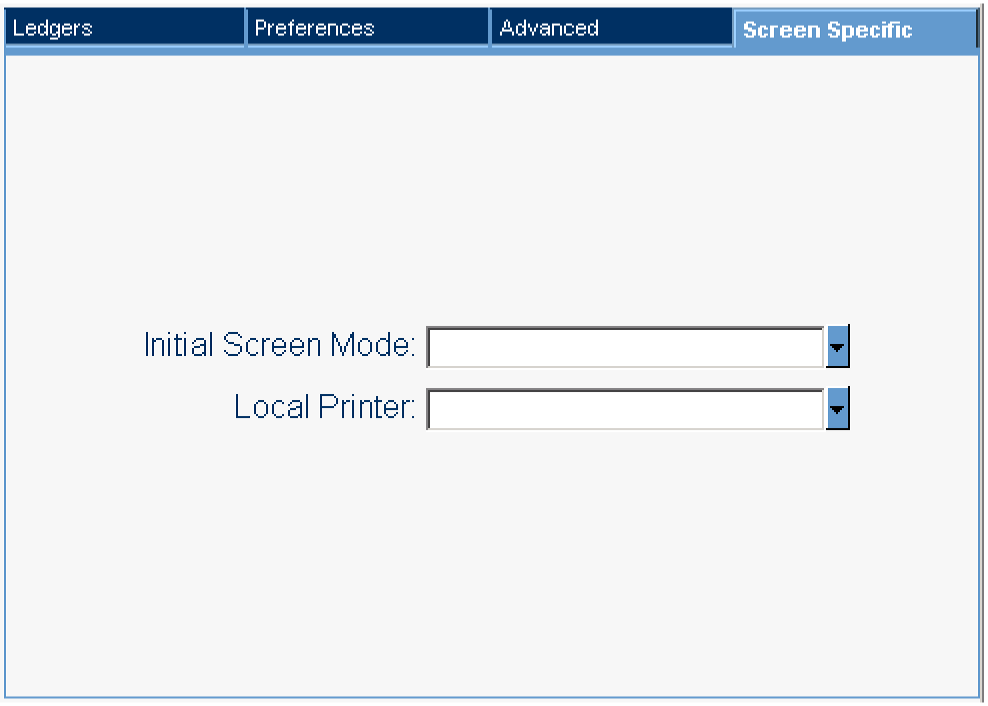


1.12 Screen Specific Tab

The screen specific tab enables you to modify the options on selected screens. For example, Initial Screen Mode enables you to open the screen in browse mode by selecting “Screen initially regular” or in select mode by selecting “Screen initially in QBE.” Opening the screen in QBE will cause it to display faster as no records are displayed until you perform your QBE.

The "Local Printers" drop-down lists the printers defined on the user's PC. The printer selected from the list (and "Apply Changes" is clicked) designates the printer that will be used when printing cash receipts via ARBTCRIC, the "Interactive Cash Receipts" screen. It will say "Not applicable." if the user clicked "No" when prompted to download the "SunGard Bi-Tech Printing Control" upon bringing up the Interactive Cash Receipts screen for the first time (if the user is not getting prompted and "Not applicable." still shows, Internet Explorer's security settings may be too tight). For further details on the "SunGard Bi-Tech Printing Control" and Internet Explorer's security settings, search for "btieprnt" and/or "local printers" in the online SunGard Bi-Tech Knowledge Base available on IFAS Insider.

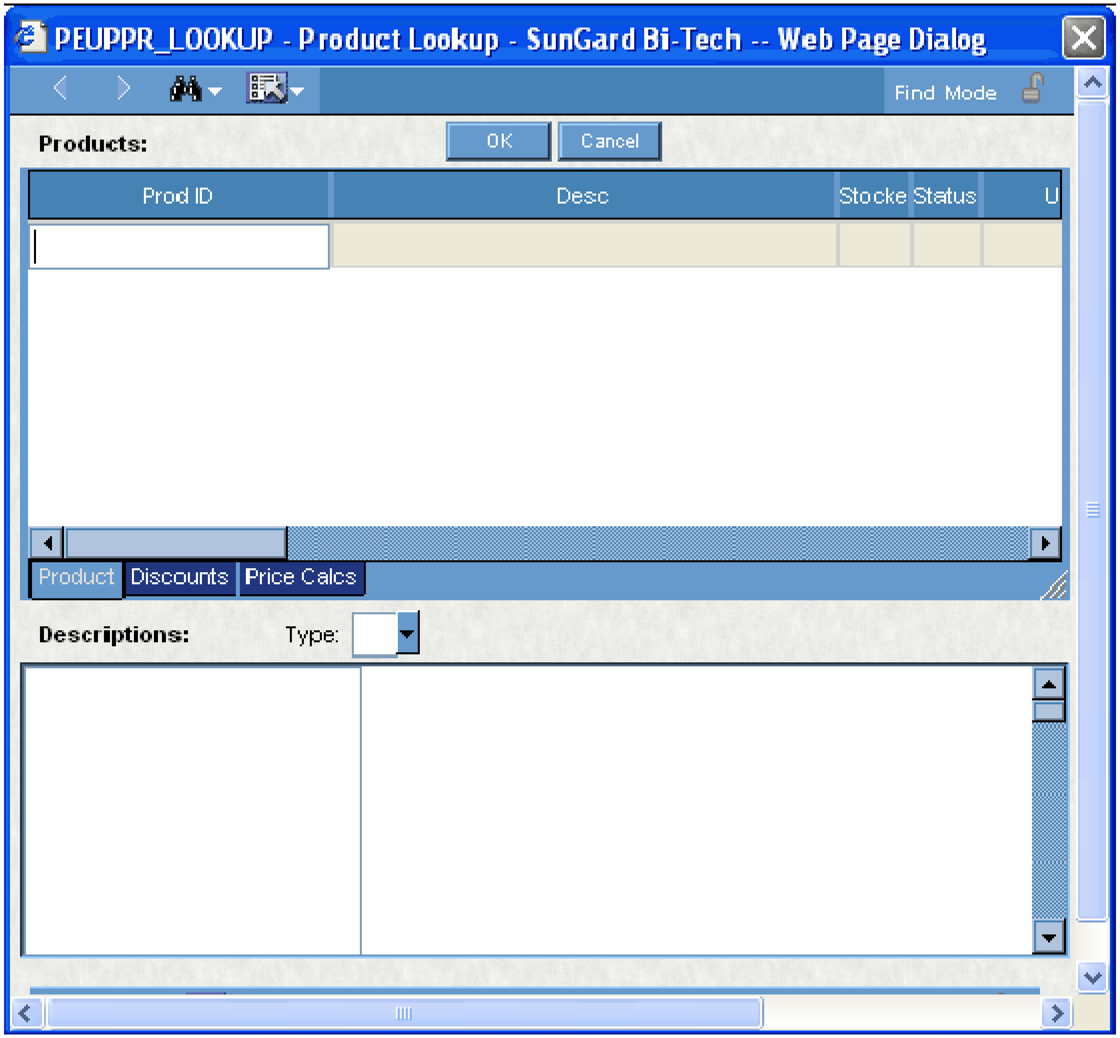
Note: Screens that are able to print to a local printer, such as CDD or Interactive Cash Receipts, require a special SBI print control that is downloaded one time (typically, when the user first enters one of these screens).



1.13 QBE Product Lookup

An alternative Product Lookup is available on the Product Id field. If you would prefer to use this type of lookup; there is setting to enable or disable on a screen by screen basis. To enable, go to Options, Settings, Screen Specific tab, QBE Lookups – set to “Enable”. To use the standard lookup, set to “Disable”.

If this lookup is enabled, the following screen will be shown:



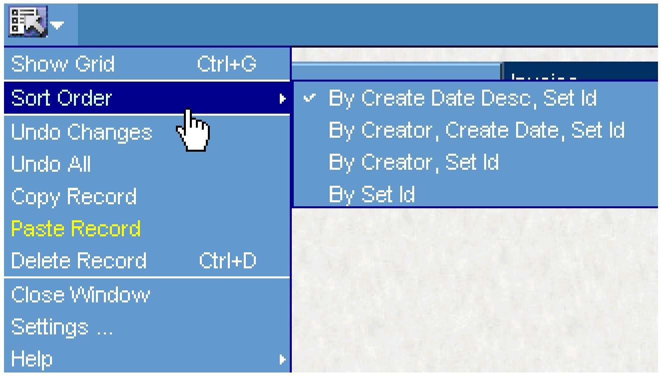
You may search by any field on the screen by entering your search criteria and pressing enter or selecting "Apply Find Criteria". All standard screen selection criteria may be applied (e.g., ABC%, >ABC, <>ABC).

The fields shown on this lookup are the same as what can be found the on the PEUPPR – Product Information screen. Column width and order may be adjusted on this screen at any time (the layout of the grid will be saved for the next time the user enters the lookup screen).

To select a value to bring back to the screen you launched the lookup from – you may highlight the Prod Id row in the grid and hit the OK button at the top of the screen OR you may double click on the highlighted row. To exit the lookup without bringing back a value – you may hit the Cancel button at the top of the screen or just close the window.

1.14 Sort Order

Allows you to select different sort options as shown below.



Undo Changes

This option will undo only the changes associated with a particular record (data source). For example, if you are using POUPPR, there is a header (or POPPvDetail) record, and an item record. Undo Changes will remove changes to the item without changing the header.

Undo All

This option removes all changes made to a record.

Copy Record

Copies the current record.

Paste Record

Paste the copied record.

Paste Cascading

On some screens, “Paste Cascading” can be used to paste the copied record. The difference between this and “Paste Record” is that associated detail records are also pasted (copied). For example, if you are using POUPPR and copy a line item, all associations, text, and split accounts will also be copied (if they exist). On some screens it may be necessary to reselect the record to see all the additional pasted records.

Delete Record (Ctrl+D)

Deletes the current record.

Close Window

Closes the Options menu.

Settings

The Settings option allows you to make changes to 7i. There are four tabs under the Settings option: Ledgers, Preferences, Advanced, and Screen Specific.

Help

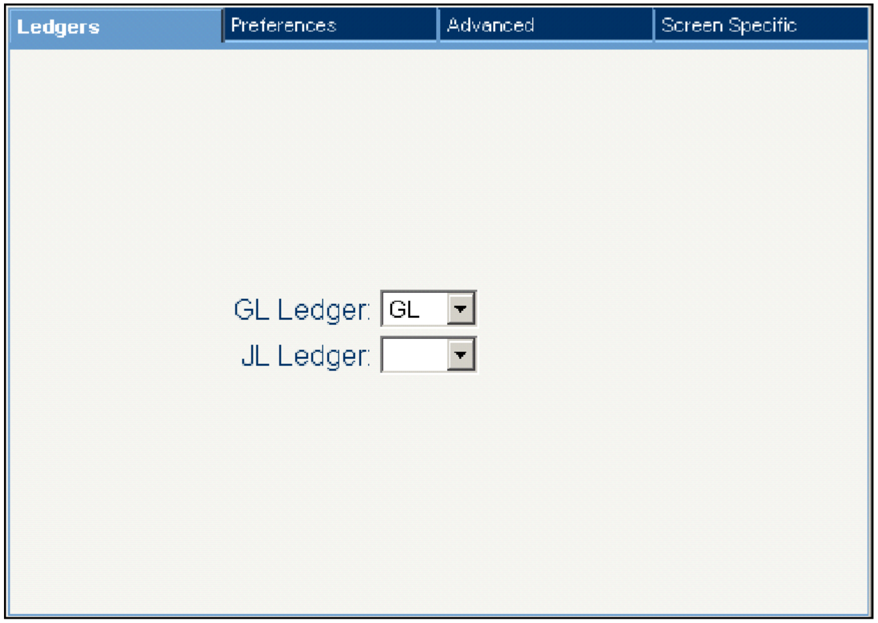
Choosing Help will show as submenu with three options. Help (F1) or pressing the F1 key will bring up the help file for this screen or tab. Navigation Help will bring up this Navigation help document. About will bring up a screen showing the Release and Build you are running along with some connection information.

CDD Reports

Brings up a submenu showing any CDD reports that have been tied to this screen. The report can be launched by selecting it.

1.14.1 Ledgers Tab

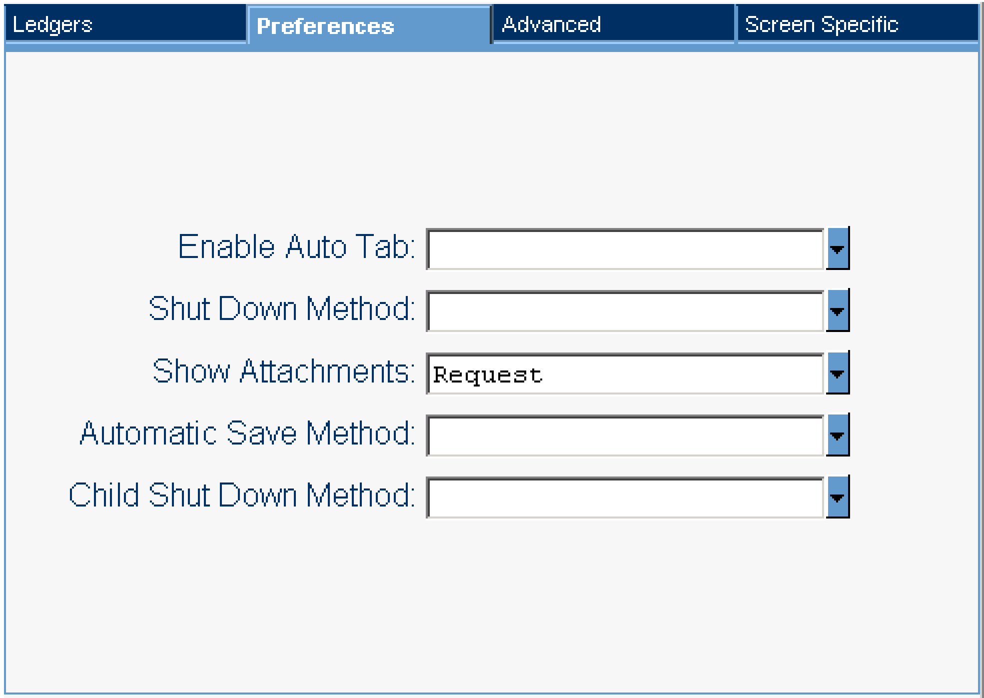
This Options menu is accessed when within a screen, and although it looks similar to the previous Options section, some tabs contain slightly different tools.



From this tab you may select from the pull-down menus to select the appropriate ledger code.

Preferences Tab

This Options menu is accessed when within a screen, and although it looks similar to the previous Options section, some tabs contain slightly different tools.

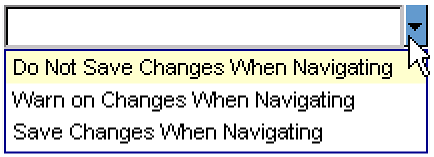


Enable Auto Tab: Allows you to tab from field to field in the default manner. When auto tab is enabled and you completely fill the field that you are in, the cursor will automatically go to next field without the user having to use the tab key. The default is "disable."

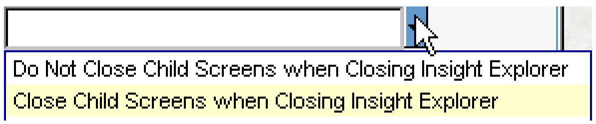
Shut Down Method: Select Shut Down to set a shut down method including saving changes, warn about saving changes, or not saving changes. This setting applies to the entire system and can be set from any screen. The setting seen in the 7i menu screen can become stale if the setting is changed via an individual screen. This is not really a problem in that the last setting change is always used. A refresh of the 7i menu screen will show the current value. The default is "do not save changes."

Show Attachments: Select Attachments to set whether attachments are always shown, shown upon request, or never shown. The default is "never" show attachments.

Automatic Save Method: Allows you to select different Save options. If Automatic Save is set to "Warn" and you move from one item row in the grid to another item row and there has been a change on the original row, you should receive a warning asking whether you'd like to save your changes. When you're in grid mode moving the focus from one row to another is considered a navigation. What's a little tricky on the POUPR screen is that moving focus from a grid row to one of the non grid fields is not a navigation because the original grid row is still the current grid row. Grids do not support batch changes, that is to say changes to a row must be saved before moving to another row. The default is “save changes on navigate.”

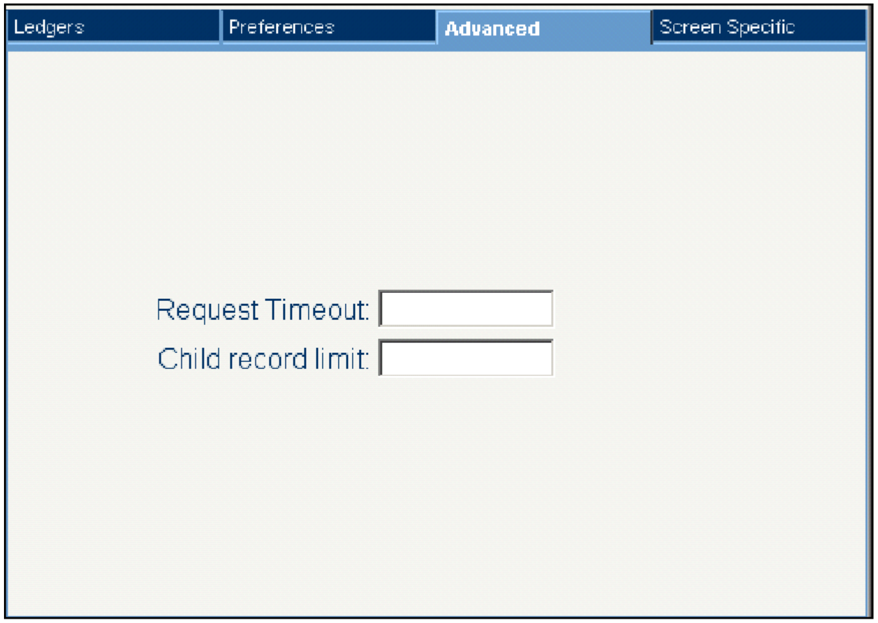


Child Shut Down Method: Allows you to control the shut down of Explorer windows. The default is “do not close children.”



1.14.2 Advanced Tab

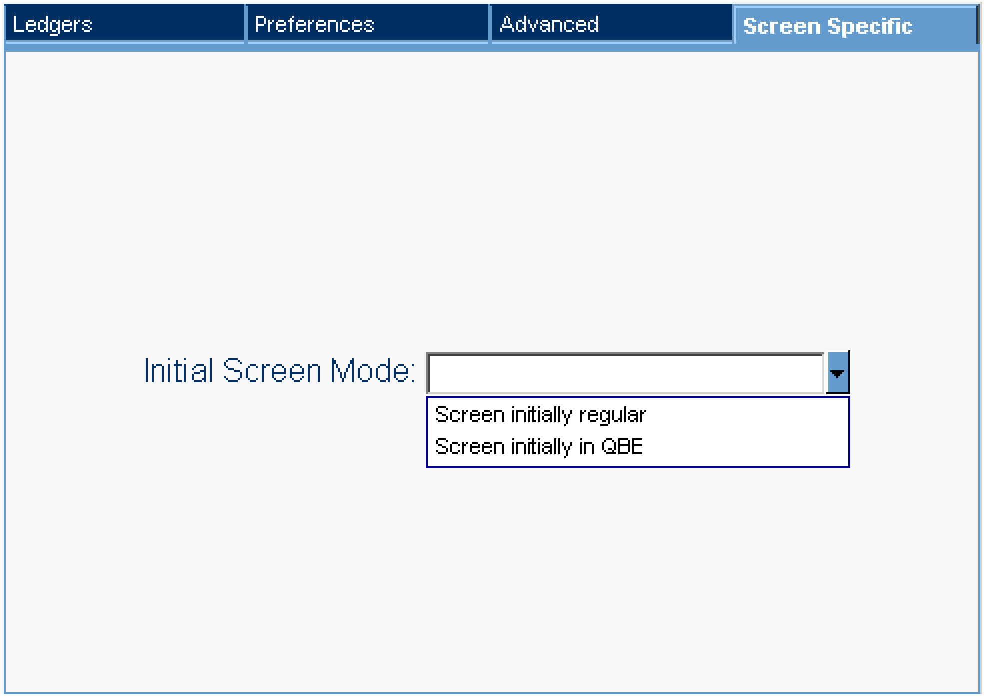
This Options menu is accessed when within a screen, and although it looks similar to the previous Options section, some tabs contain slightly different tools.



Request Timeout: The timeout value is the amount of time the system has to retrieve information before the system enters 'timeout' mode. You may use this option to define a timeout value (in seconds) greater than the default, which is 30 seconds.

Child Record Limit: The "top level" read limit is 100 records, but the system will read all "child" records as well. In extreme situations this may include thousands of child records, which may lead to problems with timeouts and buffer overflows. To avoid such problems you may limit the number of child records that will be returned using this field.

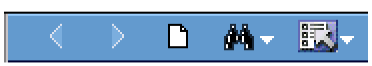
1.14.3 Screen Specific Tab



Initial Screen Mode: Use this field to choose between opening screens in "regular" (browse) mode or in "QBE" mode. Opening the screen in QBE will cause the screen to display faster as no records are displayed.

1.15 Navigation Bar (Within a Screen)

Once you have gone to a mask screen in IFAS, the navigation bar at the top of the screen changes slightly (shown below).



Moving Through Records 

These arrow buttons allow you to move through existing records.

Create a New Record 

This button allows you to create a new record.

Find 

This drop-down menu allows you to perform different search functions.

Find/Search (Ctrl+F)

If not already in Find mode, this option will be shown. Selecting Find/Search or hitting Control<F> puts the screen into Find mode so that you may enter your selection criteria on the screen.

Apply Find Criteria

When in Find mode, this option will be shown. If this option is selected (or enter is pressed), the current selection criteria will be applied and the screen will come up in view mode (if records are found). If no matching records are found, a “No Records Found” warning will be displayed and the screen will remain in Find mode.

Find Extended

Selecting this gives a submenu of tables (depending on screen) that are linked to current table that a Find Extended may be performed upon. When one of these tables are selected, a dialog box will appear which allows you to enter the selection criteria as it relates to that other table. When a Find is performed, the screen will link the selection criteria on the screen with the Find Extended selection criteria to determine the records that will be selected.

Count Records

Reports the number of records currently selected.

Show Totals

Some screens may support special totaling options. If Show Totals is selected, a totals box will be displayed and this option will have a check mark next to it. To hide the totals, select this option again and the check mark will be removed.

Apply Find To Totals

When checked, locks in a query to use for totaling (until it is unchecked). See Show Totals.

Refresh Totals

Select at any time (while totals are shown) to update the totals. See Show Totals.

Load

When you select Load**,** a dialog box is displayed. If you have previously saved definitions, their descriptions will be listed, allowing you to select the definition you need. Click OK after a selection is chosen to load the Find definition.

Save

After creating and finalizing a Find definition, Save the search criteria by selecting Save from the Find menu. The dialog box, to the right, displays for you to enter the description of the Find definition. This description will be listed as a selection when you choose to Load the Find. Click OK after entering a description to save the find definition.

Remove

To remove the loaded Find definition, select Remove from the Find menu.

Reselect

To return to the most recently loaded Find definition, select Reselect from the Find menu.

Select All

When you have loaded a Find/Search, you may return to the unfiltered database by choosing Select All from the Find menu.

Search for records with Find on the navigation menu. To initiate the inquiry, click the Find button (or press CTRL+F) and select the Find/Search command. This will clear all fields on the screen and enter Query By Example (QBE) mode. Enter criteria in the fields on the screen and then select Apply Search under the Find menu (or press CTRL + F). You are able to create Find definitions using multiple sets of criteria to search for records, as described below.

A recent change made to 7i QBE functionality leaves you in find mode if your query is unsuccessful. Previously, it put you in add mode, which meant that you would have to explicitly go back into QBE mode to try another query. To get out of find mode pull down the Find menu and make a selection.

The Escape key is a quick way out of find mode. If your query returned no rows, Escape will put you into add mode. If want to cancel a Find before doing a query, Escape will put you back into browse mode on the record you were on last.

Find mode is where you define the criteria for your query. When you hit enter you've committed to the query. Currently running queries cannot be canceled. They do time out eventually, or the screen can be closed.

If you are entering selection criteria in the detail portion of a screen, you can add the keyword “"OUTER"” to your selection criteria to indicate that you want to fetch all master records, even if they have no associated detail data. For instance, assume the detail portion of the screen contains a “"status"” field, with the possible values of “"A"” and “"I"”, meaning active and inactive, respectively. If you want to fetch only the master/detail data where there is an active detail record, you would enter ""A"" for your QBE. The problem here is that Ifas7i will not fetch records for which there is no detail information yet. If you want these records, you can enter “"A,OUTER"” for your QBE. This will fetch all master records that have Active details, or do not have any details at all (which in standard SQL is known as an “"outer join"”).

Cancel Find (Mode)

Aborts the current Find and returns the screen to the mode identified.

Selecting Sets of Criteria

Each Find definition can be made up of one or more sets of criteria used to determine which records in the database you want presented to you in the inquiry. You may use any field or combination of fields for inquiry by moving the cursor to the desired field and keying in the selections you want to see. You may make more than one selection in a field, separating values with commas. When making more than one selection from a combo box, choose multiple values from the list presented.

Example: When using the Check and Deposit Information screen to select by Bank ID and by Document Number, position the cursor in the Bank ID field and enter the desired bank ID(s) or bank ID range. Then position the cursor in the Doc Number field and enter the desired document number(s) or document number range.

After entering the criteria for the search, select Apply Search from the Find menu (or press CTRL + F) to finalize the definition and launch the inquiry.

Example: Using the same example, you have now instructed the system to find all records where the bank ID and the document number that match the selections given or the range of selections given. The record(s) that match the criteria selected will now be available. Browse the records by clicking Next and Previous.

General Standards for Selection Criteria

Enter selections in desired fields by following the general standards for selection criteria:

1. Enter in all alphabetic information in capital letters, as the filter is case sensitive.
2. To specify a range, use “:”. For example: 123:321 becomes between “123” and “321” (including 123 and 321). For data types that are character, numeric, or date type, they all function the same. For data fields that are date/time data types there is a small difference. From a practical perspective, the user does not specify the time, so the system assumes the time of 12:00 AM for each date value entered. For example: 01/01/03:01/31/03 becomes between 01/01/03 12:00:00 AM and 01/31/03 12:00:00 AM. From a practical perspective, you are not including activity on 01/31/03. To include all activity on 01/31/03, the user should select 01/01/03:02/01/03.

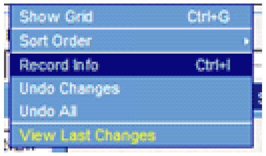
3. The “%” or “*” is used as the wildcard symbol. **“ABC%”** will return all records in which the specified field entry begins with ABC.
4. To specify selections for a field, use the following syntax:

> **>abc** greater than “abc”
>
> **>=abc** greater than or equal to “abc”
>
> **<abc** less than “abc”
>
> **<=abc** less than or equal to “abc”
>
> **<>abc** not equal to “abc”
>
> **a,b,c “a”** or **“b”** or **“c”**
>
> **a|b|c “a”** or **“b”** or **“c”**
>
> **= ab, cdef** Allows you to select text with commas

Example: To select all bank IDs that begin with a letter greater than J and all document numbers beginning with 001, position the cursor in the Bank ID field and enter >J. Then position the cursor in the Doc Number field and enter 001%.

The system will now go search the database for all records where the bank IDs are greater than “J” and the document numbers begin with “001”.

1.16 Options Menu



Show Grid (Ctrl+G) or Hide Grid (Ctrl+G)

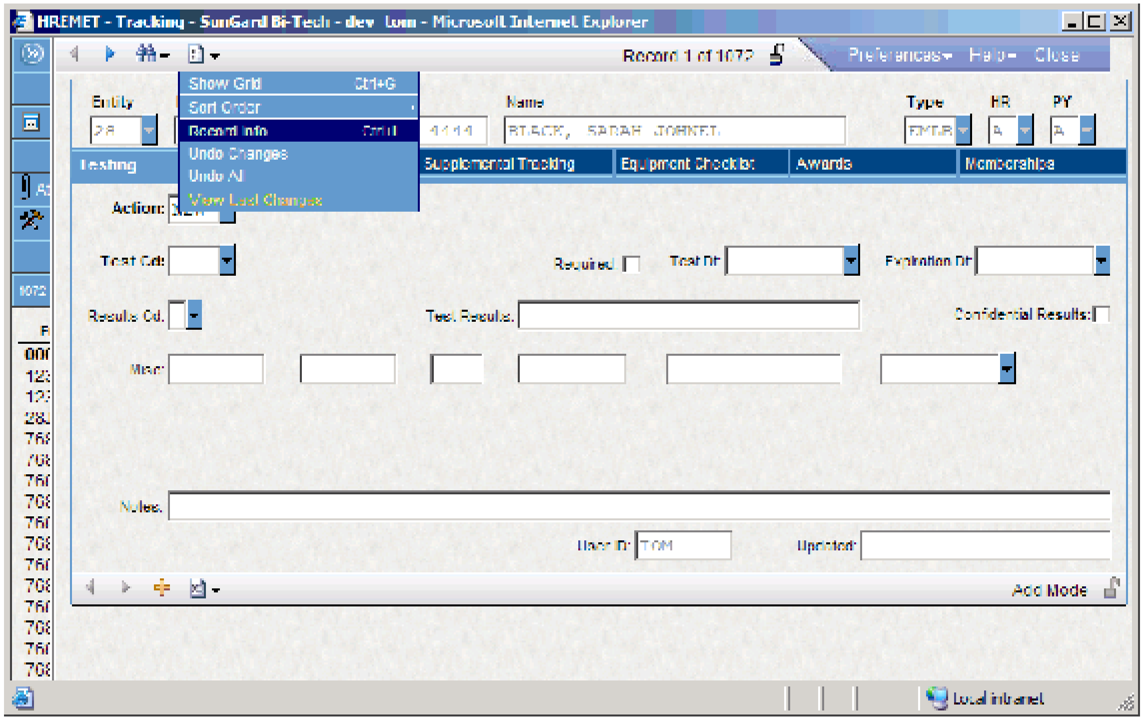
Toggle to and from grid mode and single record view mode. If you make changes to the grid settings, by re-sizing a field for example, the **Restore Default Grid Settings** option will be displayed.

Sort Order

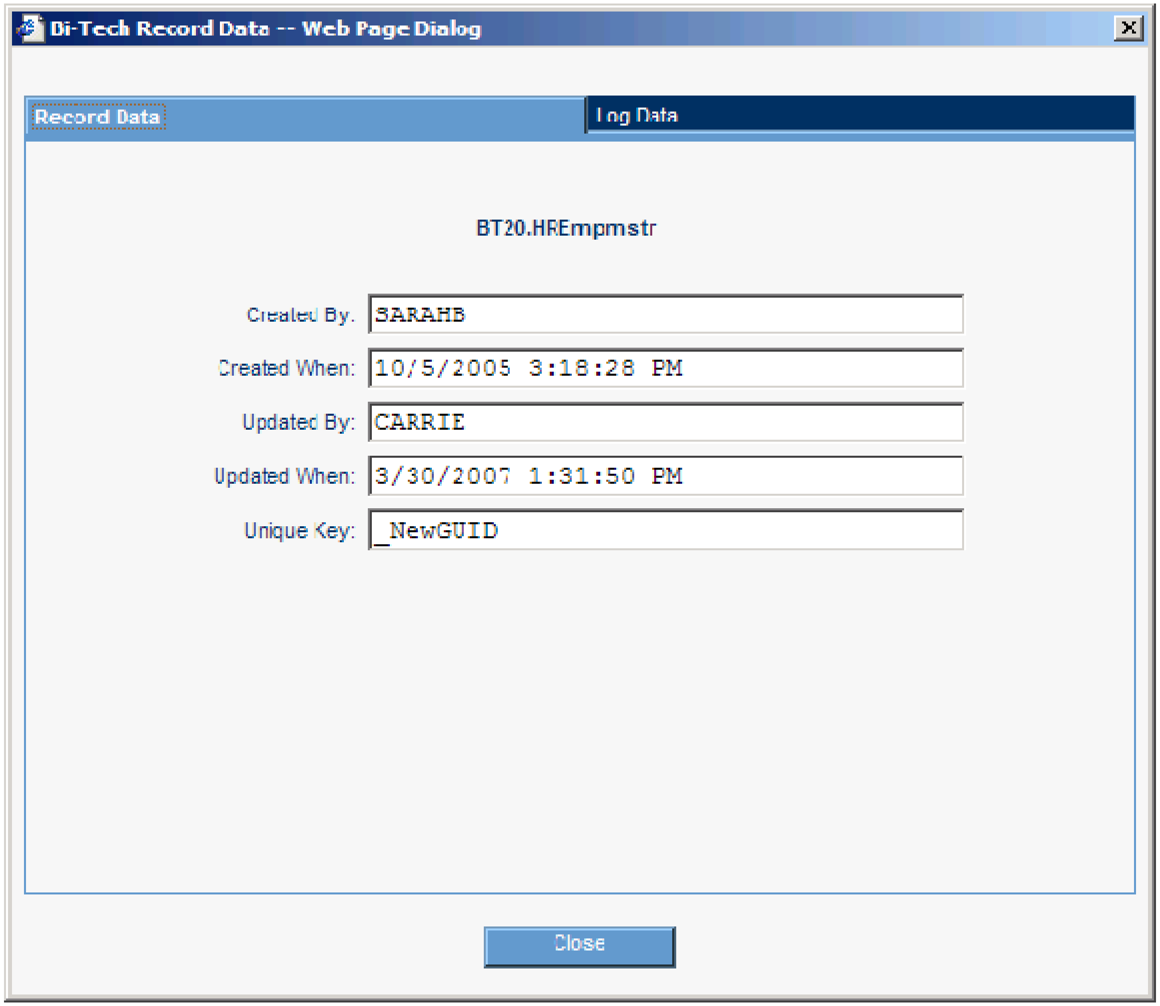
This drop down menu enables you to select the sort order.

Record Info Menu

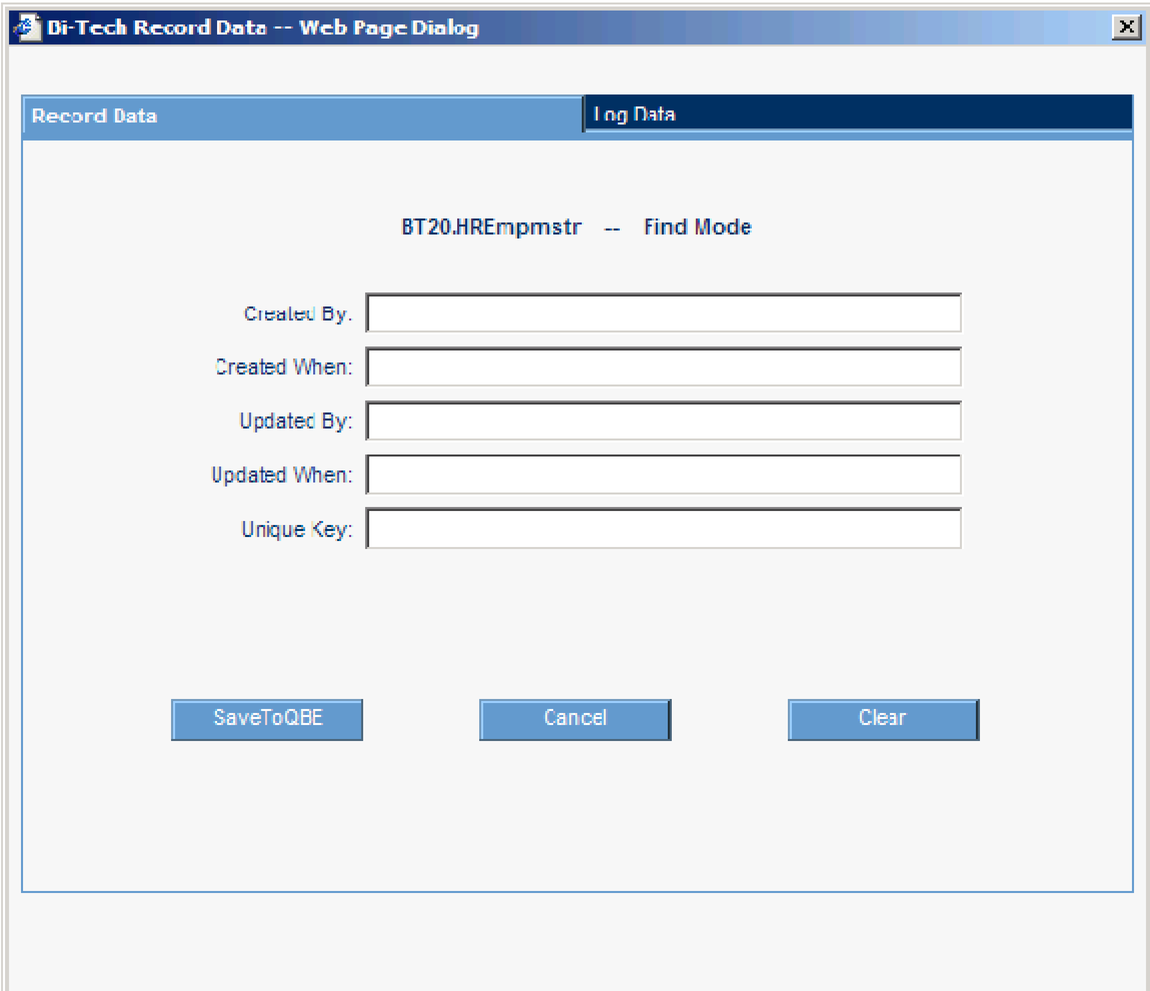
On each Nav Bar Options Menu there is a Record Info selection that can be used to bring up a pop up window.



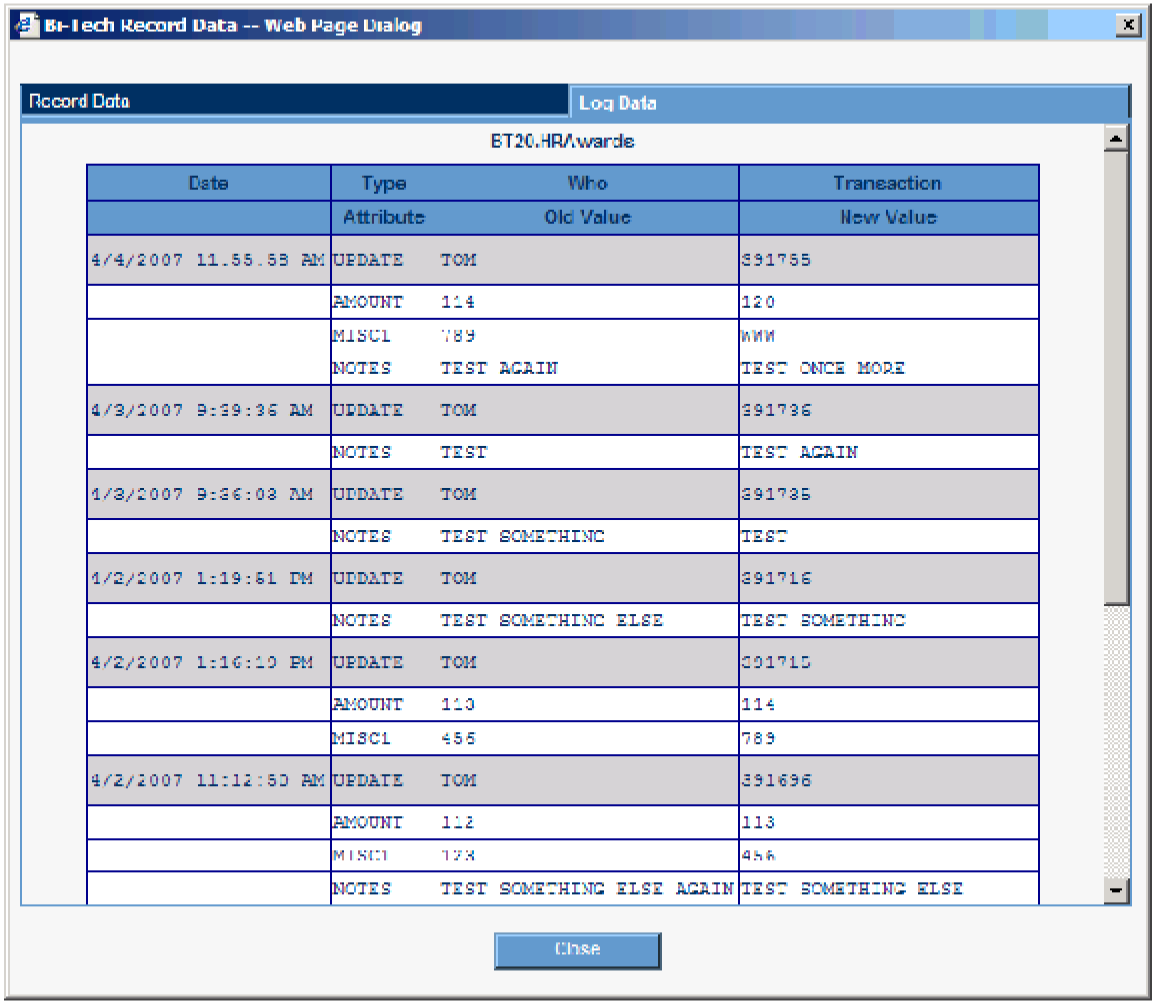
This popup has two tabs. The first tab, Record Data, shows properties on the record that might not show on the screen: Created By, Created When, Update By, Updated When, and the Unique Key identifier for the record.



If the underlying 7i screen is in QBE mode then the Record Data tab can be used to add QBE values.


Di-Tech Record Data -- Web Page Dialog
Record Data
Log Data
BT20.HREmpmstr -- Find Mode
Created By:
Created When:
Updated By:
Updated When:
Unique Key:
SaveToQBE
Cancel
Clear

The second tab, Log Data, provides a view into the change history for the record. Logging is setup via the Admin Console. Logging causes a record of changes to be saved for selected columns within a table. For more information about Logging see the Logging Setup portion of the documentation.



Date	Type / Attribute	Who / Old Value	Transaction / New Value
4/4/2007 11:55:53 AM	UPDATE	TOM	391755
	AMOUNT	114	120
	MISC1	789	WWW
	NOTES	TEST AGAIN	TEST ONCE MORE
4/3/2007 9:39:36 AM	UPDATE	TOM	391736
	NOTES	TEST	TEST AGAIN
4/3/2007 9:36:08 AM	UPDATE	TOM	391735
	NOTES	TEST SOMETHING	TEST
4/2/2007 1:19:51 PM	UPDATE	TOM	391716
	NOTES	TEST SOMETHING ELSE	TEST SOMETHING
4/2/2007 1:16:10 PM	UPDATE	TOM	391715
	AMOUNT	113	114
	MISC1	456	789
4/2/2007 11:12:50 AM	UPDATE	TOM	391696
	AMOUNT	112	113
	MISC1	123	456
	NOTES	TEST SOMETHING ELSE AGAIN	TEST SOMETHING ELSE

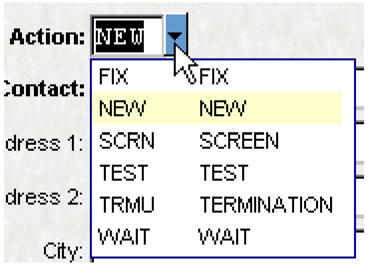
The Log Events, Insert or Update, are shown with grey background. The columns being logged are shown with a white background with their old and new values. The Log Events are sorted in descending order by date.

1.17 Selecting Options for Screen Fields

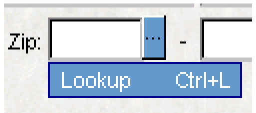
Navigating IFAS

Some fields will have lists of options (or combo boxes) that will drop down from the field when you press the arrow or ellipse to the right of the field.

The **arrow** indicates a list or “picklist” of options available for this field. Press the arrow or select the **Lookup** (CTRL+L) and a drop-down box of options will appear.



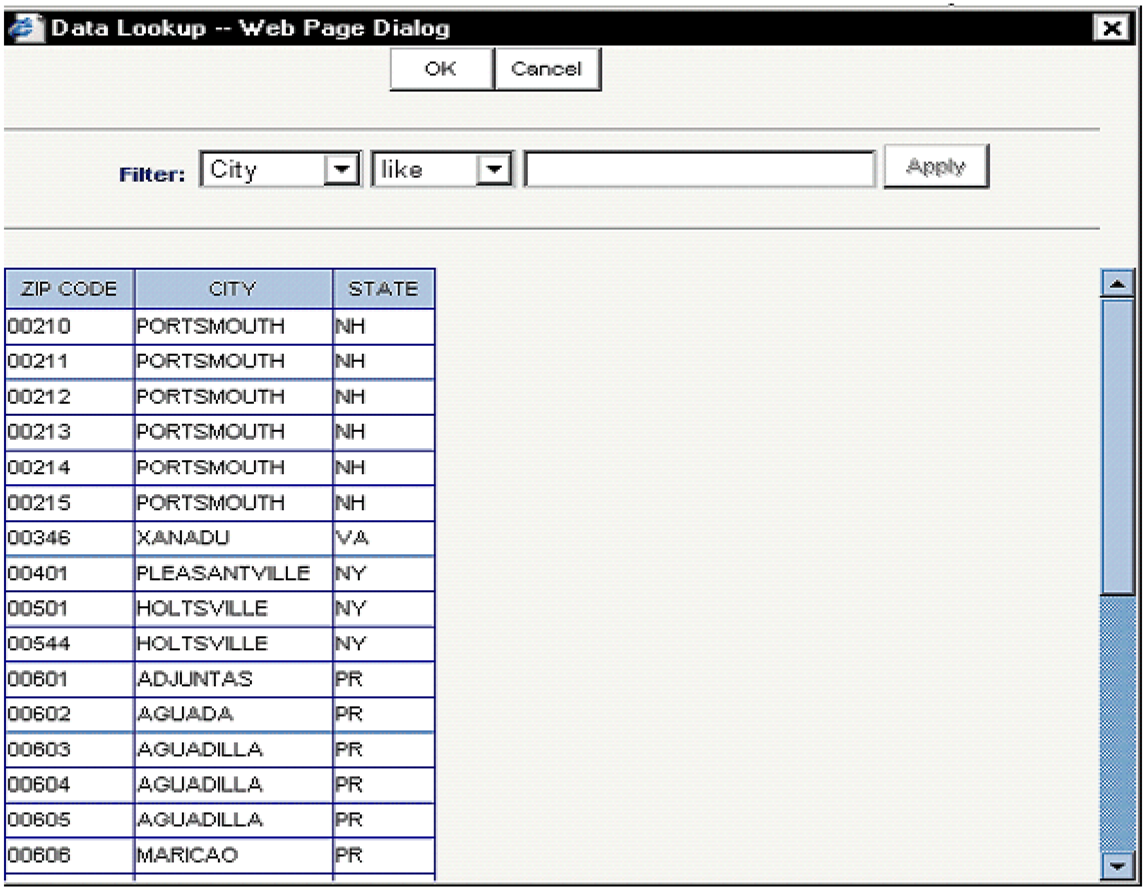
The **ellipsis** indicates there are options for this field that include auto-generated seed values or data lookups. Also, “account control” provides options using the ellipse indicator. The account control enables users to designate the proper account format (i.e., ledger, key, object; fully qualified, etc.).



Press the button and then to view a drop-down box of auto-generated seed choices such as the one below:

The option with “Ctrl+T” printed next to it is the entry you last used. The option with “Ctrl+T” beside it can be selected without using the Auto drop-down box. To select the last used entry, place your cursor in the empty field and press CTRL+T. In some cases, using the **Lookup** (CTRL+L) command in an ellipse field will cause a Data Lookup Dialog Box (shown below) to drop down.

Data Lookup Dialog Box



To create a filter to search for data in the Lookup Dialog box, you must enter information on the three fields in the box. In the first field, select the type of information by which you want to search. In the second field, select a qualifier (e.g., “=”, “>”, etc.). In the third field, enter the data that you would like to find. Then press the Apply button. For example, if you want to look up all the keys with codes less than the number 1000000, you would enter “KEY” in the first field, “<” in the second field, and “1000000” in the third field.

Note: when searching for numeric values, the "like" option is not available.

1.18IFAS Keyboard Commands

Keys	Function
CTRL+A	Add button for the nav bar associated with the field that currently has focus
CTRL+D	Selects the Delete option for the nav bar associated with the field that currently has focus
CTRL +F	Toggles Find mode
CTRL +G	Toggles grid mode for the grid associated with the field that currently has focus
CTRL +L	View the list box attached to a field with an arrow
CTRL +T	Display the last used auto-generated seed value for a field
CTRL +N	Next button for the nav bar associated with the field that currently has focus
CTRL +P	Previous button for the nav bar associated with the field that currently has focus
CTRL +1, 2, 3, 4, etc.	Move to another tabbed page on a screen. For example, if there are four tabbed pages, press **CTRL +3** to move to the third tab from the left.
F1	Press F1 to display the help file associated with the screen you are viewing
F5	Refreshes the screen.
TAB	Press the Tab key to move through the fields on a screen.
Shift+TAB	Holding the shift key when pressing Tab will move backwards through the fields on the screen.
Shift-CTRL-T	Toggles debug tracing

2 Threaded Notes

Most 7i data entry screens now include Threaded Notes references in the options bar on the left side of the screen (in the Attachments section). With this feature, anyone can provide free form notes to any record in the system. The notes are organized by thread. For instance, on a particular purchase request, the purchasing agent may want to record notes they took during a discussions he had with a particular vendor on a particular topic. The topic would be considered the Thread, and each conversation could be recorded on a separate note. As well, another thread on a different topic could be created, and related notes recorded. No setup is needed to configure whether or not Threaded Notes are available on any particular screen. Threaded Notes can be reported on CDD reports.

3 Custom Tab Order in 7i

Previously, tab order was controlled by the order in which the controls appeared in the screen .asp page which is created during screen compile. Usually, this order just represented the order that the controls occurred in our xml definition file. You could explicitly manage the order by setting the <TabOrder> element on a control to a number. This number was used by screen compile to sort the elements as they were placed into the screen .asp page.

Custom Tab Order leaves the old tab method in place, but provides a way to define additional tab orders that a user can choose to activate at any time while working on a screen. It also allows for the use of default values which automatically populate fields when a Tab Order is in place. It is hoped that the capabilities provided by Custom Tab Orders will greatly increase the ease with which users can do certain activities on 7i screens.

These Tab Orders are defined in an xml file which lives on the 7i server. The naming convention for the file is <ScreenMask>TabOrderdefs.xml. We support a standard version of this file in which SunGard Bi-tech can define TabOrders that we find useful. If it exists, it will be located in <ifas7root>/screens/<moduleName>/. We also allow clients to define site specific Tab Orders. These site specific Tab Orders should be placed in <ifas7root>/Custom/screens/<moduleName>/ directory.

To make the naming conventions concrete, using our development directory structure, the standard Custom Tab Order for the TDHREMEN screen would be found in netsight7screens/screens/humanresources/TDHREMENTabOrderDefs.xml. The client specific Tab Order will be in netsight7screens/custom/screens/humanresources/TDHREMENTabOrderDefs.xml.

If Custom Tab Orders are defined on a screen, they can be selected via the Options Menu drop down. The first entry, labeled Default Tab Order, represents the old tab behavior that exists on the screen now. The other entries represent Custom Tab Order choices that have been defined for different tasks or users of this screen. An accelerator key, ctrl-o (for order), can be used to toggle between a Custom Tab Order and the Default Tab Order. This provides a quick way of getting into and out of a Custom Tab Order.

Here's an example of what a standard Custom Tab Order definition might look like.

```
<sbixml>
  <TabOrderDefs>
    <TabOrderMask mask="ARBTCRIC" >
      <TabOrderDef id="_tab1" desc="Back Order Parking Tickets $7.00" ifasUser="@">
        <Tabs>
          <Tab elementId="BTDirectCashCRController_Desc_BTEditControl"  firstElement="Y" />
          <Tab elementId="BTDirectCashCRController_Price_BTEditControl"  />
          <Tab elementId="BTDirectCashCRController_Account_BTEditControl" defaultValue="Y" forceDefault="Y" GlGr="GL"
GlKey="101201" GlObj="1301" JlGr="GL" JlKey="101211" JlObj="1311" Wo="4" Level="10"/>-->
          <Tab elementId="BTPaymentCRController_Amt_BTEditControl" />
        </Tabs>
        <RecordDefaults>
        </RecordDefaults>
      </TabOrderDef>

      <TabOrderDef id="_tab2" desc="Back Order Parking Tickets" ifasUser="TOM">
        <Tabs>
          <Tab elementId="BTDirectCashCRController_Desc_BTEditControl"  setRecordDefaults= "Y" firstElement="Y" />
          <Tab elementId="BTDirectCashCRController_Price_BTEditControl"  />
          <Tab elementId="BTPaymentCRController_Amt_BTEditControl"
nextElement="BTDirectCashCRController_Desc_BTEditControl" />

          <Tab elementId="ARBirMasterCrippledDSC_Ref_BTEditControl"   />
        </Tabs>
        <RecordDefaults>
          <Default elementId="BTDirectCashCRController__FinCd_BTComboBox" defaultValue="PARKING"/>
          <Default elementId="BTPaymentCRController_Type_BTEditControl" defaultValue="CK"/>
        </RecordDefaults>
      </TabOrderDef>
      <TabOrderDef id="_tab3" desc="Back Order Water Payments" ifasUser="MARY">
        <Tabs>
          <Tab elementId="BTDirectCashCRController_Price_BTEditControl" firstElement="Y"  setRecordDefaults= "Y" />
          <Tab elementId="PeId" />
          <Tab elementId="BTPaymentCRController_Amt_BTEditControl"  />
        </Tabs>
        <RecordDefaults>
          <Default elementId="BTDirectCashCRController__FinCd_BTComboBox" defaultValue="FC01"/>
          <Default elementId="BTPaymentCRController_Type_BTEditControl" defaultValue="CK"/>
        </RecordDefaults>
      </TabOrderDef>
    </TabOrderMask>
  </TabOrderDefs>
</sbixml>
```

Here's a Node and attribute dictionary:

<sbixml>

Root node, follows our standard convention.

<TabOrderDefs>
<TabOrderMask mask="ARBTCRIC">

Strictly speaking, these nodes are not needed given the naming convention for the xml file. If we ever merge Custom Tab Orders from several screens then these will help separate the definitions. Obviously the mask attribute should contain the actual mask for the screen in question.

<TabOrderDef id="_tab1" desc="Back Order Parking Tickets $7.00" ifasUser="@">

Represents a Custom Tab Order definition. These are the nodes that define the choices that the user will see from the Tab Order selection under the Options Menu on the Nav bar. If this is from the standard SunGard Bi-tech provided Custom Tab Order then the id attribute should be given a name starting with '_'. For Client specific Tab Order definitions the id attribute should start with an alphanumeric. The user sees the values of the desc attribute in the Tab Order selection from the Options Menu. The ifasUser attribute should be set to '@' if this definition is to be visible for all users. To make the definition visible only for a particular user then set ifasUser to that user's ifas login name (in upper case).

<Tab elementId="BTDirectCashCRController_Desc_BTEditControl" firstElement="Y" />

The <Tab> node defines a screen element that participates in the Custom Tab Order. The elementId attribute should contain the ID of the element which can be found either in the screen definition xml or the screen asp page generated by screencompile.js. Currently, we only support a subset of screen elements that map to our HTC control definitions. We don't support custom tabbing to BTButton elements or tabStrips.

The order of the <Tab> elements within a definition provides the tab transitions that will be used unless other directives are present. In other words, the Custom Tab transitions will follow the order of the <Tab> elements in the xml file. When the user is on the last element in the Tab Definition and hits tab, then the tab order will wrap around to the first <Tab> element. Shift Tab is also supported and works the transitions in reverse order.

Attributes on the <Tab> element can change the way Custom Tab transitions are handled. One such directive is the firstElement attribute. There should only be 1 firstElement defined for a given <TabOrderDef>. The presence of this attribute set to "Y" tells Custom Tab Order that focus should be initially set in this element after a screen navigation event (i.e., selecting at Custom Tab Order from the menu, pressing enter, or navigating to the next record).

<Tab elementId="BTPaymentCRController_Amt_BTEditControl" nextElement="BTDirectCashCRController_Desc_BTEditControl" />

Here's another example of a <Tab> node attribute that modifies the transitions that Custom Tab Order will provide. The nextElement attribute contains the element ID of the control to which we will tab from the present control. Usually, this will be an element that participates in the Custom Tab Order (exists as a <Tab> node within the definition). However, it can be any arbitrary element on the screen. If the value of the nextElement attribute is "default" then the underlying default tab order of the screen is used to determine the transition.

If a Custom Tab Order is in effect and the user is presently on a screen element that is not part of the Tab Order definition then the normal tab transition will be used. Once the focus lands on an element that participates in the Custom Tab Order then the custom transitions will be used.

<Tab elementId="BTDirectCashCRController_Account_BTEditControl" defaultValue="Y" forceDefault="Y"

GlGr="GL" GlKey="101201" GlObj="1301" JlGr="GL" JlKey="101211" JlObj="1311" Wo="4" Level="10"/>

This <Tab> element defines some default values that are placed into the element when a Custom Tab Order transition results in focus on that control. Normally the defaultValue attribute would hold the value that you'd like to place into the control. This particular control is an EditAccount control which requires special handling, defaultValue is set to "Y" and the actual values to default are given by the following attributes: GlGr, GlKey, GlObj, JlJr, JlKey, JlObj, Wo, and Level. Normally the default values will only be populated when the underlying control is blank (or 0 in the case of numerics). Set the forceDefault attribute to "Y" if you'd like the default values to be populated even if non trivial values are all ready in place.

The phone control, with it's phone code and number is a special default case similar to the EditAccount control. For the phone control set defaultValue to "Y" and then use attributes PhoneCode and/or PhoneNumber to define your defaults.

<Tab elementId="BTDirectCashCRController_Desc_BTEditControl" setRecordDefaults= "Y" firstElement="Y" />

Default values are usually populated when tabbing into a control. If you would like a variety of fields to receive default values all at one time then you can use the setRecordDefaults attribute. When this is set to "Y" and a Custom Tab Order transition results in focus on this control then the Custom Tab Order logic looks for a <RecordDefaults> node. The children of this node define a set of elements to receive default values.

<RecordDefaults>

Children of this node define a set of elements to receive default values when setRecordDefaults is turned on for an element in the Custom Tab Order (see entry immediately above).

<Default elementId="BTDirectCashCRController__FinCd_BTComboBox" defaultValue="FC01"/>

Identifies an element to receive a default value. The actual default value is defined in the defaultValue attribute (just like in a Tab node). You can force the default value into elements that are non blank by setting forceDefault to "Y" (again just like the Tab node defaults).

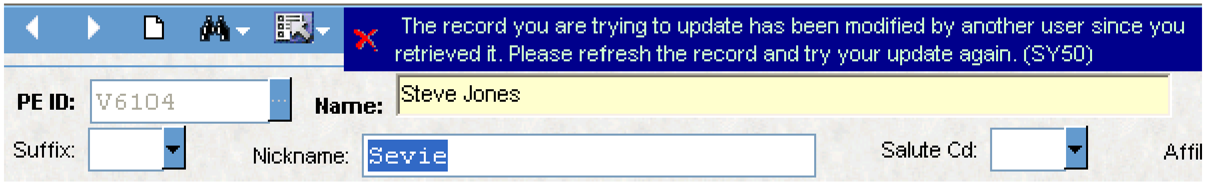
Use caution when defining default values. Defining a default value on a Tab node is safest because it won't happen until you actually tab into the field. When you leave that field the afterfield rules will fire as expected with the new value in place. Defining record level defaults causes the default values to be placed in all the fields defined under the RecordDefaults node. The fields are marked as dirty and the value is placed into the control and it's related data source record if it exists. However, at present, no afterfield rules are fired for these Record Defaults.

Record defaults on custom screen controllers may have unexpected behaviors. Record Defaults should be thoroughly tested before doing real work on the screen.

4 Update Lock

By default, records updated via the 7I screens perform no record locking at the database level. If two users retrieve and update the same record, the last user to perform the update will have their changes committed to the database, and the first user's changes may be overwritten (depending on which columns are updated.)

To prevent this situation, an option has been added to the Nucleus Common Codes that restricts the update from occurring if another user has updated the record between retrieval and update. This option adds a restriction to the update statement that checks the last modification date/time of the record. If the record's modification date/time has changed between retrieval and update, the update attempt fails. The user is notified that the record has been modified between retrieval and update, and they are requested to refresh the record and try their update again.

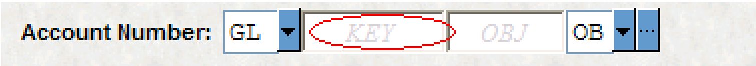


NOTE: In some cases, the table being updated does not contain a column to store the record's last modification date/time. In this case, the update lock option compares every value that was originally retrieved with the record against every value that is currently stored in the database's record. If any values do not match, it is assumed another user has made changes to the record between retrieval and update.

To configure the update restriction, configure the Nucleus SY7I Common Code for UPDTLOCK. See the Common Codes Guide for further information.

5 Account Number Search on Org Key

5.1 BTEditAccount Control



When a user performs a lookup on the Key field in an EditAccount control, the new lookup page "OrgKeyLookup" will be used. The OrgKeyLookup page allows a user to filter the results based on 1 selectable field as well as up to 8 background parts. Each of the selection criteria wll be treated as a 'like' comparison allowing for the use of wildcards in the search. Each additional selection criteria chosen will narrow down the resulting records further.