Become an IFS Super User, IEE Client

Key Exercises -- Student Guide
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0. Your IFS Applications Credentials and Programs

For this class, you will be using the following IFS Applications programs:

1. the IFS Enterprise Explorer for exercises in chapters 1-5;
2. the Base Server Administration Tool for some exercises in chapters 5 and 6.

**NOTE:** On C: drive, open folder NACS, then create shortcut to folder Become An IFS SuperUser; move shortcut to desktop.

You will login with a UserID and Password per the table below which assigns UserID and Password depending upon the session of this class that you are attending. All students in the same session will use the same UserID and Password. Since each user in a class is operating the IFS Applications in their own copy of the database -- and on their own computer -- everybody can use the same UserID and Password and not interfere with other users.

<table>
<thead>
<tr>
<th>Session</th>
<th>Class ID</th>
<th>UserID and Password for Distribution executable</th>
<th>UserID and Password for Admin executable and Solution Manager (IFS Administrator)</th>
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<tbody>
<tr>
<td>8:30AM – 12:00PM WINDOWS</td>
<td>SUPERU, SUPERME</td>
<td>SADMIN</td>
<td></td>
</tr>
<tr>
<td>1:00PM – 4:30PM IEE</td>
<td>SUPERU, SUPERME</td>
<td>SADMIN</td>
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<table>
<thead>
<tr>
<th>Session</th>
<th>Class ID</th>
<th>UserID and Password for 5. Spreadsheet Data Manager</th>
<th>Connect To:</th>
</tr>
</thead>
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<td>8:30AM – 12:00PM WINDOWS</td>
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<td>CuSu001:58080</td>
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</tr>
<tr>
<td>1:00PM – 4:30PM IEE</td>
<td>Alain, alain</td>
<td>CuSu001:58080</td>
<td></td>
</tr>
</tbody>
</table>
CHAPTER 1

1-1. Navigation Exercises

Purpose: The purpose of these exercises is to help you become familiar with some of these IFS Enterprise Explorer Navigation features:

- IEE Workspace
- the Navigator Panel, Navigator Page and Navigator Filter
- Shortcuts
- Breadcrumbs
- Form Startup Behavior
- Multiple windows and Recent Screens
- the Context Panel: Help and Output;
- Attachments: Connected Objects, Virtual Map and Media Library; IEE Shortcut Keys

Presentation Reference: See the Navigate section of the slide presentation (slides 14-84).

Log into IFS Enterprise Explorer with the Username and password assigned to you.

Purpose: The purpose of these three exercises is to help you become familiar with the IFS Enterprise Explorer Navigator.

1. Locate Voucher Entry using the Navigator
2. Locate Customer Order using the Navigator Page
3. Use Breadcrumbs to navigate your way deeper in the Sales structure

Purpose: The purpose of these two exercises is to help you become familiar with changing the startup behavior of a form in IFS Enterprise Explorer.

4. Configure the Customer Orders page to open with the search dialog
5. Configure the Customer Order page to open and populate data.

Purpose: The purpose of these three exercises is to help you become familiar with managing the content of the IFS Enterprise Explorer Navigator Panel.

6. Hide the Financials folder.
7. Move folders from one node to another.
8. Rename a folder.
9. Undo what you’ve done when you make a mess.

**Purpose:** The purpose of these five exercises is to help you become familiar with the IFS Enterprise Explorer Navigator Filter.

10. Find the page for an Expense Report (it might not be called Expense Report).
11. Find the Resource Breaks page. Can you use the filter to find just a single occurrence?
12. Find the *Manual Supplier Invoice* page.
13. Find the *Part* page.
14. Clear the filter using the context menu.

**Purpose:** The purpose of these three exercises is to help you become familiar managing shortcuts.

15. Create a shortcut for the page *Expense Report*.
16. Create a shortcut for the folder *Customer Order/Analysis*.
17. Change the icon for one of your shortcuts

**Purpose:** The purpose of these three exercises is to help you become familiar managing the shortcut layout.

18. Show all *Shortcuts* in a 5x5 grid.
19. Show the *Text size* of your Shortcuts to large.
20. Show all *Shortcuts* in one column.

**Purpose:** The purpose of these six exercises is to help you become familiar working with multiple windows.

21. Open a page in a new window from the Navigator.
22. Open a page in a new window from the Context Menu
23. Open a new window from the Toolbar
24. Arrange the windows on your screen

25. Try the Zoom button. For example, start entering a purchase order then Zoom from the Supplier field

26. Close the other open IEE windows that you no longer need open (like the Supplier window).

**Purpose:** The purpose of these two exercises is to help you become familiar with the Context Panel, output channels and attachments.

27. Export a list of customer order lines to an Excel Spreadsheet.

28. Connect a document to a customer order.
CHAPTER 2

2-1. Appearance/Personalization Exercises

**Purpose:** The purpose of these exercises is to help you become familiar with these IFS Enterprise Explorer Appearance Personalization features:

- Application Options
- Themes
- Home Page
- Text Color
- Regional Settings
- User Profile
- Clock(s)
- Form Personalization (layout; mandatory, default and concealed fields; tabs)
- Full Screen View
- Context Panel: System Information
- Your Personal Portal

**Presentation Reference:** See the *Personalize the Appearance of your Client* section of the slide presentation (slides 90-140).

**Purpose:** The purpose of these 2 exercises is to help you become familiar with setting field colors in IFS Enterprise Explorer.

1. Set the color for READ-ONLY text.
2. Set the color for EDITED text.
3. On which tab of the Options dialog box can you select a theme?

**Purpose:** The purpose of this exercise is to help you become familiar with Regional Settings in IFS Enterprise Explorer.

4. Setup your IFS calendar to show week numbers.

**Purpose:** The purpose of these two exercise is to help you become familiar with personalizing a form in IFS Enterprise Explorer. There are many options available for controlling how information displays in an IEE *form* page. You will make some fields mandatory, some read-only and establish a default value for a field. Then you will rearrange how the header section of the form appears. Finally, you will remove some of the tabs from the form.
5. Make a copy of the standard Sales Quotation window so that you have it twice in your
folder. Rename it to "Sales Quotation - [your first name]." Change the Sales Quotation
form as follows:
   a. Make the header field "Additional Discount%" disappear.
   b. Make a value in the "Reference" field mandatory.
   c. Move the field "Quotation No." off to the far right.
   d. Hide the tabs named "Competitors" and "Misc Quotation Info"

6. BONUS: Make a copy of the Customer Order window so you have it twice in the folder.
Rename it to "Customer Order - [your first name]."
   a. Open the window. On the header section of the form RMB: Properties – the
      Object Properties window opens.
   b. Click the Layout tab and tick the checkbox [x]Enable this layout on current data
      source. Click the [Apply] button. Move the dialog box beside the Customer Order
      window so you can see both windows.
   c. Make the Customer's PO No field mandatory: click the Mandatory tab and tick
      the checkbox preceding the field, then click the [Apply] button.
   d. Make the Priority field and Additional Discount(%) field Read-Only: click the Read
      Only tab and tick the checkbox preceding each field, then click the [Apply] button.
   e. Set a default for the Coordinator field: use LOV or type ALAIN, then click the
      [Apply] button.
   f. Now, let’s rearrange how the fields display in the header section: click the Layout
      tab.
   g. Move the Notes and Document Text checkboxes to a more prominent location at
      the right-hand side of the form. Move Priority also to the top right corner to the
      right of Wanted Delivery Date/Time. Move Customer PO No to where Reference
      was .
   h. Make the Reference field disappear from the form: Highlight Reference in the
      panel titled Objects on ‘frmCustomerOrder’: then untick the Visible checkbox and
      watch it be removed from the form immediately. Click the [Apply] button then
      click the [OK] button.
i. Remove tabs you don’t use: on the Layout tab, click ‘Change the tab visibility’ and un-tick the checkboxes for Charges, Delivery Information, References and Order History, then click the [OK] button. Click the [Apply] button. You should receive a message that ‘The tabs visibility has been changed and the changes will be noticed first when the window is opened the next time.’ Click [OK]. Now click the [OK] button to exit the Object Properties window. You’ll see a popup Warning Message: The tabs visibility has been changed and the changes will be noticed first when the window is opened the next time. Click [OK]. Close the form.

j. Reopen the form. How many tabs appear? ____. Add a new customer order (for customer 1000) and do not enter anything in the Customer PO No field. Notice the coordinator has been set to ALAIN (or whatever you determined to be your default value). Save (F12). You should get a popup message “The field [Customer’s PO no] must have a value.” Click OK, enter a value in that field and try to save again.

k. EXTRA BONUS. There’s any easy way to swap field placement instead of repositioning each field independently. On which tab do you do this? How?

2-2. User Profile Exercises

Purpose: The purpose of this exercise is to familiarize you with how to save the user profile you have setup for yourself in IFS Enterprise Explorer.

1. Use Options then click on the User Profiles tab.

2. How do you save your user profile immediately to the database? __________

3. How do you export a user profile to an external device (flash drive) for safekeeping? __________
CHAPTER 3

3-1. Search for Information Exercises

Purpose: The purpose of these exercises is to help you become familiar with these IFS Enterprise Explorer Personalization features:

- EAS: Enterprise Application Search
- Simple, Advanced and Configured Search
- Saved Searches
- Column Sorting
- Sorting LOV choices

Presentation Reference: See the Search for Information section of the slide presentation (slides 143-168).

Purpose: The purpose of these 4 exercises is to help you become familiar with using Enterprise Application Search (EAS).

1. Find a specific customer order for steel wheel:
   a. Select search domains Customer Orders, Customers and Sales Parts
   b. Search for steel wheel; how many items found? _________
   c. Limit your search by entering +"Steel Wheel" +Mercedes; how many? ___
   d. Limit your search again by entering +"Steel Wheel" +Mercedes +mario; ___
   e. Select all customer orders and select Show Details via the context menu

2. Search for a specific order by entering order number:
   a. Use same search domains as in Scenario1
   b. Search for BP10061
   c. Click on the link to open the order in the customer order page

3. Find out how many different fuel pumps exist:
   a. Add search domain Part Catalog
b. Search for fuel pump; how many are found?

c. Limit your search by entering "fuel pump" - how many?

4. BONUS: Use the Enterprise Application Search to locate all the entities containing ‘1000’ as an identifier.

   a. Check which domains you are searching by using the pulldown to the right of the search box and select the following under Options: Customer Orders, Customers and Suppliers.

   b. Search for Customer 1000 (or "Customer 1000").

   c. When the results are displayed in the Search Results box, find Customer 1000. What happens when you click the Customer 1000?

   How could you prevent this from happening?

Purpose: The purpose of these 3 exercises is to help you become familiar with the search function and saved searches in IFS Enterprise Explorer.

5. Configure the Search dialog:

   a. Open the search dialog Customer Orders page

   b. Configure the search dialog by adding the following fields: Customer No, Order No, Status, Wanted Delivery Date, Sales Contract No. and click OK

   c. Click Cancel in the search ox, then start a search again.

6. Add fields to the Search dialog without configuring:

   a. Open the search dialog in Customer Orders page

   b. Show all fields and enter search criteria in some fields: Site and Customer Name

   c. Hide empty fields and search

7. Create saved searches:

   a. Open the search dialog in Customer Orders page
b. Create saved searches for orders in status *Planned, Delivered, Picked*

c. Notice that the saved searches are available from the navigator (new entry appears in orange); from the search button drop down list and from the search dialog (Saved Searches)

d. Create shortcuts for the saved searches

e. What are your saved searches (how can you find them)?

**Purpose:** The purpose of this exercise is to help you become familiar with the substitution variables available in the search function in IFS Enterprise Explorer.

8. Open the Customer Order Lines window.

   a. Create and save a query to find all of the released orders for customer NA1000 sorted by the Wanted Delivery Date/Time with the most recent order to be delivered appearing first. How many orders are there?

   b. Create and save another query to find all the planned/released order lines sorted by total cost, with the most expensive orders appearing at the top of the list, for any one of these customers without specifying their customer ID ahead of time in the saved query: 1000, NA1000, 6100, 6200. How many orders are there for each customer

   c. Create and save another query to pull up all of customer NA1000’s order lines which are to ship this month; but, setup the query so you can use it any day without changing the date values in the query. How many order lines ship this month?

**Purpose:** The purpose of these 2 exercises is to help you become familiar with sorting columns in the overview page and sorting choices in an LOV dialog in IFS Enterprise Explorer.

9. Sort data in overview page

   a. Open *Purchase Orders* page and populate

   b. Try sorting by *Status, Supplier, Site and Wanted Receipt date*

10. Sort data in a LoV dialog

    a. Open *Purchase Order* page

    b. Click New button to enter a new purchase order
c. Click List of Values in *Supplier* field

d. Try sorting the list by *Supplier, Supplier Name*
CHAPTER 4

4-1. Organize your Information Exercises

**Purpose:** The purpose of these exercises is to help you become familiar with these IFS Enterprise Explorer Information Organization features:

- Column Chooser
- New Folders
- Unique Views
- Selections
- Templates
- Drafts
- Conditional Formatting
- Info Services

**Presentation Reference:** See the Organize your Information section of the slide presentation (slides 172-232).

**Purpose:** The purpose of these two exercises is to help you become familiar with creating your own folders in IFS Enterprise Explorer.

1. Create a New Folder for yourself that appears within another folder.

2. Create a New Folder for yourself that will appear as a top node in the Navigator.

**Purpose:** The purpose of these two exercises is to help you become familiar with managing selections in IFS Enterprise Explorer.

3. Create a Selection with critical orders
   
   a. Open Customer Orders page and add all orders with Coordinator: ALAIN or Salesman USDEMO1 to a Selection

   b. View/use your selections

**Purpose:** The purpose of this exercise is to help you become familiar with drafts in IFS Enterprise Explorer.

4. Create a draft, then complete your draft:
   
   a. Create a Sales Quotation; do not save it.

   b. Save it unfinished as a Draft.
c. Send the Task to your colleague with Person_ID USDEMO9.

d. Login as USDEMO9, password is USDEMO9

e. Open tasks, open the specific task, finish the draft (notice the different color IFS page header?) and tell SUPERU about it.

f. Login as SUPERU and check your SENT tasks. "The draft has been removed."

g. Check your tasks -- see the completed Sales Quotation.

Purpose: The purpose of this exercise is to help you become familiar with conditional formatting in IFS Enterprise Explorer.

5. Open Activity Resources and create a Conditional Formatting rule

a. Create a rule for all activity resources with more than 100 planned hours. Use Text style: Bold, and Text color: Black; apply this rule to the entire row

b. Create a rule for all activity resources with Resource ID: MECHENG. Use Background color: Purple; apply this rule to the entire row.

Purpose: The purpose of these exercises is to make you familiar with the method of creating an alternate version (or multiple alternate versions) of a page in IFS Enterprise Explorer.

6. Make a copy of Inventory Parts and change its name. (Edit: Copy; Edit: Paste)

a. Specify that this window format is a unique one Where do you set this?

b. Change the column order, hide and resize some columns (display only Part No, Part Description, Site, Net Weight, On Hand Qty and Part Type), then close the window. Open the other original view and the new view of the window. Are the columns the same in both views?

c. BONUS: Have this alternate version start the query dialog automatically and allow query only on the fields defined above
CHAPTER 5

5-1. Collaboration Exercises

**Purpose:** The purpose of these exercises is to help you become familiar with these IFS Enterprise Explorer Collaboration features:

- Sticky Notes (and color choice)
- Send to colleague via Task or E-mail
- Tasks
- Events

**Presentation Reference:** See the **Collaborate** section of the slide presentation (slides 236-294).

1. Use the Sticky Note and send a task to a colleague.
   a. Create a sales quotation.
   b. Attach a sticky note to the sales quotation.
   c. Use the Send-To Colleague and send a task to user SUPERME.
   d. Login as SUPERME and open Tasks in the Context Panel with a shortcut key.

5-2. Event Manager Exercises

**Purpose:** The purpose of this exercise is to make you familiar with how to setup messages to be handled automatically through the IFS Event Server when some condition occurs. You will create an Event Action which will generate an IFS Personal Message to be sent to your UserID whenever a customer order is released.

**Presentation Reference:** See the **Collaborate** section of the slide presentation (slides 236-294).

1. Expand folder IFS Solution Manager then expand folder Configuration and click Event Actions which will open the Manage Event Actions window. Click Create New Action Event. Use the Perform Event Upon select button [ … ] to list all the pre-defined events.

2. Highlight the row which has the Event ID = ORDER_RELEASED. Hint: it happens to be the only one of the CustomerOrder group with the Event Enabled checkbox not ticked. RMB: Create New Action for Event. Use the pull-down for Action Type: to select
Personal Message, then enter an Action Description such as “Send a Personal Message to me whenever customer orders are released.”

3. In ‘To Foundation1 User:’ enter your UserID. Type appropriate message text in the ‘Message:’ field that will help you understand the Personal Message when you receive it. For example, it might be useful to know the order number and customer number and/or name. Use the ‘Available substitution fields:’ panel to customize the message like this: Order number &ORDER_NO for customer &CUSTOMER_NO : &CUSTOMER_NAME with a total base price of &TOTAL_BASE_PRICE has been released. Tick the ‘[X]Enabled’ checkbox. Save.
   a. Open your Personal Messages window; populate the window.
   b. Release a customer order (one you created or any order for customer NA1000 just NOT order P101 or PD-00) and refresh it to see when the order’s status changes from ‘Planned’ to ‘Released’ then refresh your Personal Messages window.
   c. Double-click the message cell to open the message in a window. Exit.
   d. Highlight the new personal message and RMB. Notice that the option for ‘Show Record’ is disabled. Wouldn’t it be nice if you could open that particular order from here? You can! Continue the exercise.

4. Using the event action you just created, add the ability to drill down to the appropriate record from the personal message. As when you created a new custom menu function, you need to know the name of the IFS form you want your personal message to open as well as key field information so that when the IFS form is opened, it populates it with the information you need to see in order to respond to the personal message.
   a. In ‘Reference:’ type the form’s identifier (Customer Order).
   b. In ‘Reference Parameters:’ type the key field name and assign the value of that key to use. Hint: the key fields are listed in the ‘Available substitution fields:’ and their values are assigned using the & character and the key field name.
   c. Release a different customer order When its status has changed to ‘Released’ refresh the Personal Messages window. What happens this time when you highlight the message and use RMB? _________________________________. What happens when you use RMB:Show Record? __________________________________________

5. If your company processes lots of customer orders, can you see where this might be annoying for you to get messages every time an order is released? You can limit the actions so that a message is sent to your UserID only when you are the salesperson responsible for the customer order. Click ‘Conditions for performing this action’ to open an ‘Edit Condition’ window. Click in the ‘Condition’ column for a field and use the pull-down to select a condition, then enter an appropriate value in the ‘Value’ column. Remember: you can use the Available substitution fields. When you close the condition window, you will see the Condition you just specified appear on the main screen of Event Action. Use condition SALESMAN = ALEX then release two orders, one with ALEX as salesman, another order with a different salesman or no salesman. Which one triggers the message? ____________ Why? __________________________________________

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6. BONUS: Create a completely new event to monitor changes to the price of a sales part. Hint: This is a custom event. Show new and former (old) list price and change date as well as the sales part number, inventory part number and site.

h. .
CHAPTER 6

6-1. Really Neat Stuff Exercises

Purpose: The purpose of these exercises is to help you become familiar with some of these IFS Enterprise Explorer 'cool stuff' features to help you with data entry and manipulation:

- Date Field Calendar
- ZOOM
- Custom Help
- Smart LOV
- Math in decimal fields
- Find & Replace
- Support for High DPI
- Support for Right to Left Languages

Presentation Reference: See the Do Some Really Neat Stuff section of the slide presentation (slides 296-356).

1. Calendar. The customer is on the phone with you as you enter the order; they indicate they want a delivery next Monday and you don’t have your calendar in front of you – not a problem! Just double-click the Wanted Delivery Date/Time field to popup a calendar. Use the arrows to navigate to other months. Select the date by clicking it.

2. ZOOM. The customer informs you that they have moved and would like you to change their delivery or document address. To open the Customer window so you can make these edits, you do NOT need to use the IFS navigator or even your Links. Just position the cursor in the Customer: field in the header and press SHIFT+F9 (or click the Zoom icon which is the magnifier glass); this opens the Customer window for you. In the Customer window; you could change the customer address on the Address tab. You may also continue zooming. For example, click the Order tab and go to the Market field. Click ZOOM. Now you have three windows open and only used the Navigator to open the first one.

3. Smart LOV (Qualified List of Values). Open the Customer Order form. Create a new Customer Order. In the Customer field, press F8 (LOV) or press the LOV icon. Notice the customers listed. To select NA6200 you must scroll through past a few others. You could now press the [Query] button and type in NA% to return only those Customers that have a Customer No starting with NA. But, let’s make this process quicker and easier by starting out with a LOV containing just the customers starting with NA. Exit the query box and in the Customer field on the Customer Order form, type NA then press CTRL+K. This opens the LOV window for customers displaying only customer numbers beginning with NA instead of all customers on file. Press [End] to select customer number NA6200, then press [OK]. Continue using this Customer Order for the next three steps of this exercise.
4. **Arithmetic in decimal fields.** Enter ‘NO’ in the Order Type field and enter your name in the Customer’s PO No field then save. Create a line item in this customer order and enter BP10 for Sales Part No, then tab past Description and enter 2 for Sales Qty and save the record. You have a current 20% discount promotion so in the customer order header field ‘Additional Discount (%)’ enter 20. But, the sales manager has offered this customer – for this order only -- a multiplier discount. It starts at 20% but then there is another 5% and then another 2%. You’re calculator is not handy – no problem. In the Additional Discount(%) field type \((1-(.8*.95*.98))\)*100 and press save to perform the math. The discount should be 25.52%. (If the sales price of your line item is 100, then the discount should be 25.52 and the net should be 74.48 – you can see this in the line item or at the bottom of the customer order). An ‘=’ sign in front of the equation ignores the length of the field so you can type a lengthy equation in a short field.

5. **Internal mass change – with validation.** You can use the Find and Replace function to handle mass maintenance allowing you to forego the monotony of changing every single object in a large group.
   a. On the Inventory Parts page, you may want to hide all but these columns to make it easy to see what is happening: Part No., Part Description, Site, Type Designation, Commodity Group 2.
   
   b. Search for parts 21-5% at site 1 (there are 8 items).
   
   c. On the Inventory Parts page, position the cursor in column Type Designation, RMB: Edit...Find and Replace (or use CTRL+F);
   
   d. click on the Replace tab; enter Find What: value=A2 and Replace With: B2, for Look In: use the pull-down to choose ‘Type Designation’ (which it should say if you did RMB:Edit or CTRL+F from that column)
   
   e. then select [Replace All]. If you receive the Question ‘IFS Applications has reached the end of the table. N replacements were made. ‘Do you want to continue searching at the beginning’?, then answer Yes. Save.

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6-2. **Custom Menu (RMB) Exercise**

**Purpose:** The purpose of this exercise is to make you familiar with how to add your own right mouse button (RMB) functionality. In these exercises you will learn to open another IFS window as well as how to open a non-IFS application program.

**Presentation Reference:** See the *Do Some Really Neat Stuff* section of the slide presentation (slides 296–356).

**Scenario:** We want to allow users to jump from the Suppliers for Purchase Part window directly to the Inventory Part form and automatically display the part’s information. From the Inventory
Part column on the Suppliers for Purchase Parts, you can ZOOM to open the Purchase Part form and then use a right mouse button to open the Inventory Part form; but, that's two clicks and too many clicks for some users!

1. Open the Suppliers for Purchase Part window and open the query window. Register any value for Site and for Part. Click on the Advanced tab to see their table names. What are they? _____________________

Log into the IFS Base Server Administration Tool (Admin) executable. Remember, it is a different userid and password than you used for the IEE logon. See Page 3.

2. Within the Configuration folder, open the Custom Menu folder; open Custom Menu and create a new record. A menu ID will be assigned for you (460).

3. In the Action Type section choose Create window with transfer.

4. In the Window field, type the screen on which the RMB function should appear. In this example it is the Overview of Suppliers for Purchase Parts – make sure the text is entered exactly as the system has identified it on the Object Properties window.

5. In the Ordering window, enter a numeric value which will be used to sequence the RMB functions on the popup menu in the source window.

6. In the Action Attributes section, in the field Parameter: type the window that is to be opened as a result of using the new RMB function. In this example it is the Inventory Part form.

7. In the Menu Text tab, create a new record. In the Language Code field, use LOV to select the proper dictionary (just use en), then you can enter an appropriate Title for the function you just created. In this example, enter a Title of "Open Inventory Part Form".

8. In the Key Translation tab, enter the names of the key fields in order to ‘pass’ the record from one form to the other. In this example, you need to specify the site and the item number. You can determine these key field names by opening a query in the ‘from’ and ‘to’ windows and entering a value, then click on the Advanced tab to see the field names. Sometimes, different tables have different names for the same field. In this example, enter two rows where Source Key Name and Destination Key Name are the same: one row for the item number and another row for the site. Save.

9. Back in the IEE user interface, open the Suppliers for Purchase Part window and query for any part that starts with a 2 and contains a dash anywhere following the 2 (vs. immediately following the 2). You should find 5 parts for 4 suppliers: 5000, C1000, 29-001 and 29-002).

10. Select any row except the one for part 29-OSP/supplier 29-001, then RMB; do you see your new RMB menu item? If you cannot see your new custom menu option in the pull down menu, do you remember what else you must do after defining the custom menu?
11. Select the row for any of the parts then RMB; does the Inventory Part information display? If you cannot see the Inventory Part information do you know why?

12. BONUS: Add (or change) a custom menu to have the RMB appear only for a single instance of multiple views of the same window. Hint: There’s a PROCESS field in the Custom Menu form. If you look at any menu item’s Object Properties when the [X] Own Process checkbox is ticked, there will also be a value for PROCESS.

13. BONUS: Add a custom menu function to open Customer Agreement form window from the Customer Master. If you populate Customer Agreements you will see there are two of them, both for customer 6100. Close the Customer Agreements window; open the Customer window, query for customer 6100 and use the RMB to display these agreements in the Customer Agreement form. Use the pull-down at the Agreement ID field to see the other one. If this isn’t working, make sure you double-check the names you used for the key-field in the Custom Menu.

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6-3. History Tracking Exercise

**Purpose:** The purpose of this exercise is to help you become familiar with this IFS Enterprise Explorer feature so that the system captures the change history for specific fields in a table:

- History Tracking

**Presentation Reference:** See the *Do Some Really Neat Stuff* section of the slide presentation (slides 296-356).

1. In IEE, open folders IFS Solution Manager / Configuration / Logs and Queues and select Setup History Log. In the ‘Setup History Log’ windows tree navigator panel, scroll to and expand Customer Orders, scroll to and expand Sales Part, then select SALES_PART_TAB. Tick the checkboxes in the appropriate columns (Log Insert, Log Update, Log Delete) for the column (field) name you wish to audit. For this exercise, tick the Log Update checkbox for the Column NOTE_TEXT. Specify a value for ‘Remove history older than (days):’ at the top of the form, save. (548 = 18 months)

2. Change the Discount Group in the Sales Part form. In addition to the event-driven personal message you’ll receive, you can now query the complete history of changes to this field’s value: while in the Sales Part form press CTRL+F9 (or use Commands | History).

3. Query History from the Solution Manager to see all history for all views; query history from a specific window in the Windows client to see only history of changes related to the window’s table(s).
6-4. Spreadsheet Data Manager Exercise

**Purpose:** The purpose of these exercises is to help you become familiar with this IFS Enterprise Explorer 'cool stuff' features to help you with data entry and manipulation:

- Spreadsheet Data Manager

**Presentation Reference:** See the *Do Some Really Neat Stuff* section of the slide presentation (slides 296-356).

**Scenario:** An inventory planner must change the value of the secondary commodity code for a large number of items. Spreadsheet Data Manager allows you to export data from IFS to a Microsoft Excel spreadsheet, manipulate the data, then import it back into the IFS database. As Spreadsheet Data Manager processes the import, it validates the data with the same business logic as if you were entering data through an IFS window. Use IFS Output Channels to export a specific list of items to the IFS Spreadsheet Data Manager (hint: it's a Microsoft Excel add-in); then change the commodity code values and update the information back to the IFS Applications. **Scenario:** You suspect that some paint is misclassified as Commodity Group 2 = 810. Use a query, the Output Channels and IFS/Spreadsheet Data manager to correct this. You should find 10 items that have the wrong Commodity Group 2 code.

- Query for all **black paint** and **white paint** items with this incorrect value for Commodity Group 2 and change it from 810 to **811**.
- Change one of your item's new commodity code to 86 to see what happens. After you have finished processing in the Spreadsheet Data Manager, refresh the Inventory Parts page and observe the changes and the one exception.

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**End of Key exercises.**
IEE Mousepad Reference