Version 25 | Trapeze Enterprise Asset Management

Enterprise Portal

Administrator Guide

Trade Secret | February 2025

Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone:	1-877-411-8727
E-mail:	cc@trapezegroup.com
FTP Site:	https://ftps.trapezegroup.com/
Web Site:	https://collaborate.trapezegroup.com

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest Product Compatibility information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Enterprise Portal - Administrator Guide

Version 25.x

February 2025

Contents

1. Overview

The Enterprise Portal module is a web-based alternate end user interface to the base application logic. To users familiar with the graphic user interface (GUI) screens, it provides a familiar look-and-feel to grid and tabs, function buttons, and screen menus, while removing the need for a client-side installation. Users have access to all the same screens and functions as through the GUI but access the screens through a standard web browser.

Requirements

This software requires the software Application and Web Modules as outlined in the *Administrator Guide*. Please refer to the *Compatibility Matrix* for a compatibility list for the software. The machine on which the Enterprise Portal is to be installed must meet the following minimum hardware prerequisites:

- Minimum Pentium III 1GHz processor or equivalent.
- Minimum 512 MB, 1 GB RAM recommended.
- Minimum 100 MB available hard disk space.

⚠ The Web Modules must be installed to access the Enterprise Portal screens. If, for some reason you cannot access the Enterprise Portal, refer to the *Installation and Access Guide, Section 2. Installation,* and *Section 3. Enable Access* sections to ensure the Web Modules are set up correctly, and access has been granted for the Enterprise Portal.

⚠ The Enterprise Portal module does NOT support anonymous access to “All Users”. To access Enterprise Portal screens, an individual user must be logged into Web Modules.

⚠ The administrator must extract the zipped Help files (located in the Help directory). Please ensure that the extracted files are kept in the Help directory.

Assumptions

This guide assumes familiarity with workflows and configurations of the application.

- User defined required fields that do not appear in Web Modules will return validation messages.
- The intended audience for this Enterprise Portal Administrator Guide includes IT (Information Technology) staff. Please ensure that the individual installing and configuring the Enterprise Portal is from your IT department.

Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.

Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Configure Enterprise Portal

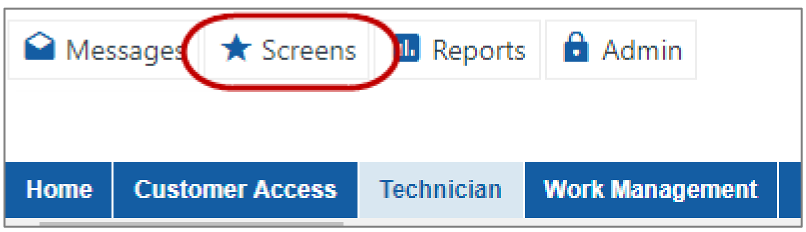
To access the Enterprise Portal, use the Enterprise Portal Shortcut, the Screens button. The Enterprise Portal shortcut allows you to customize different menus viewed by different user groups.

Refer to the *Administrator Guide, Section 2. Initial Configuration, Accessing Administrative Features, The Admin Center, Managing Shortcuts* section for detailed instructions on adding shortcuts and configuring security access to those shortcuts.

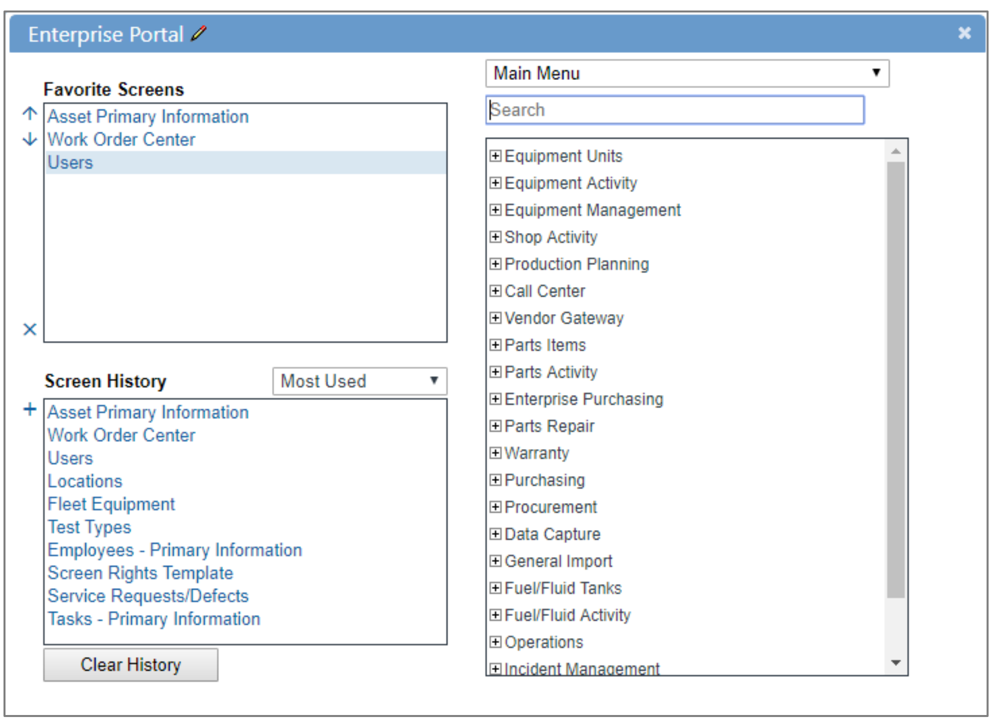
Enterprise Portal Shortcut

To open the Enterprise Portal Shortcut:

1. While logged into Web Modules as the administrator, click on the **star** icon for the Enterprise Portal Shortcut.



The initial Enterprise Portal Shortcut displays.



If you see a message stating that no menu file has been specified, you need to configure the screen menu .xml file as outlined in the following section.

Selecting a Screen Menu .xml File

The menu that is displayed in the Enterprise Portal Shortcut is more flexible than the menu structure in the GUI. Through the Enterprise Portal Menu Settings page and an easy-to-create .xml file, you can create different menus for different user groups and determine precisely:

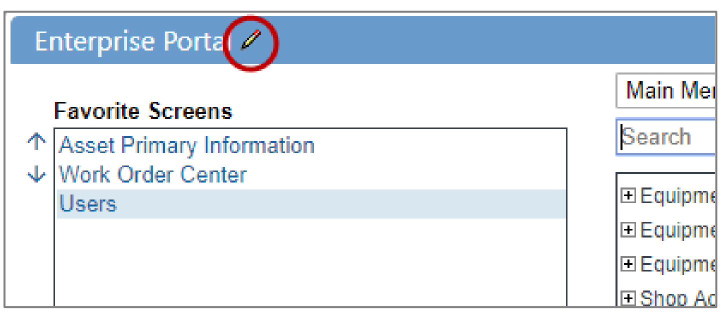
- What screens are shown
- What folders and subfolders exist
- What screens exist in which folders
- What screens are named

Out of the box, there are three screen menu .xml files (all located in your InfoCenter\Web\FAScreen folder): FAMenu.xml, FAMenuFull.xml, and MechanicMenu.xml. These are simple examples that provide a starting point for your Enterprise Portal Shortcut menus.

Appendix A describes how these screen menu .xml files can be edited to meet your needs. Until you become familiar with how to edit these files, select FAMenuFull.xml.

To select the .xml file.

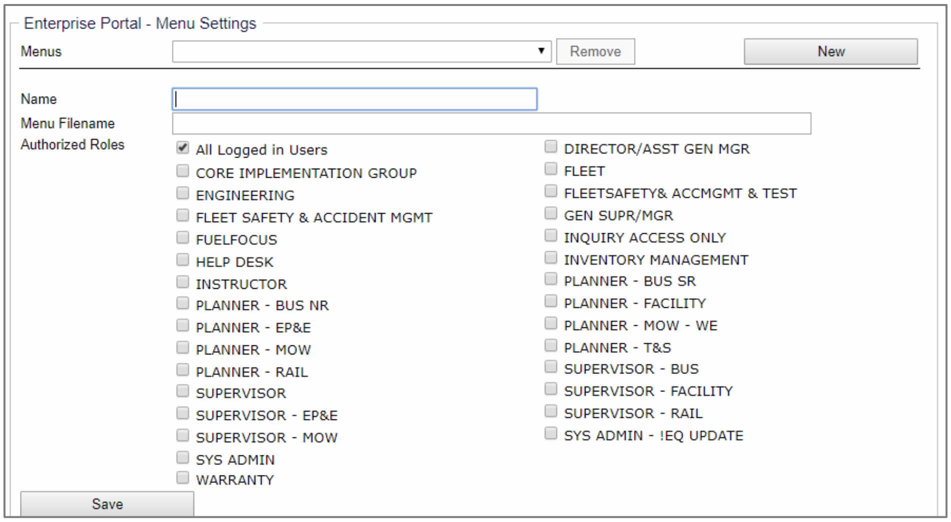
1. In the Enterprise Portal screen menu, click the pencil icon.



The Enterprise Portal - Menu Settings page displays.

2. Click **New**.

The Enterprise Portal – Menu Settings page displays.



This page is where you can restrict access to custom menus to specific user groups. For example, you can have one menu show for Engineering, a different menu show for Fleet, and yet another show for Sys Admin.

i. In the **Name** field, enter a title for the menu.

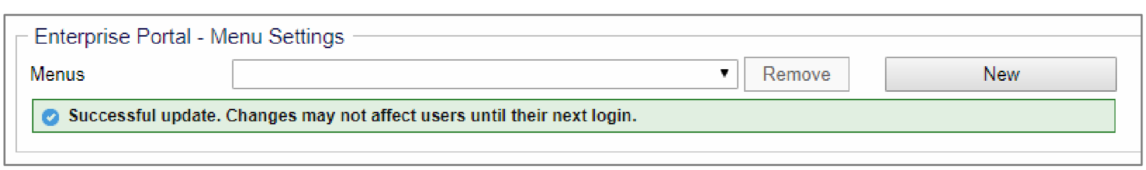
ii. In the **Menu Filename** field, type the filename for the menu. In this example, we will use: < ~/fascreen/famenufull.xml>. You may experiment with the other out-of-the-box screen menu .xml files (Menu.xml and MechanicMenu.xml) to see differences. To create your own screen menu .xml files, see Appendix A below.

iii. In the Authorized Roles section, select the user groups to provide the menu access.

3. At the bottom of the page, click **Save**.

This example uses the .xml code in the FAMenuFull.xml screen menu XML file to determine which screens to display (and in which menus and submenus). Viewing the file FAMenuFull.xml with a simple text editor will show how the menu is structured.

*After clicking **Save**, you return to the Enterprise Portal – Menu Settings page, where the menu now displays in the drop-down list.*



You now have a designated, specific menu for a user group. When a member of that user group clicks the Enterprise Portal Shortcut, the Screens button, Enterprise Portal opens.

3. Understanding the Enterprise Portal

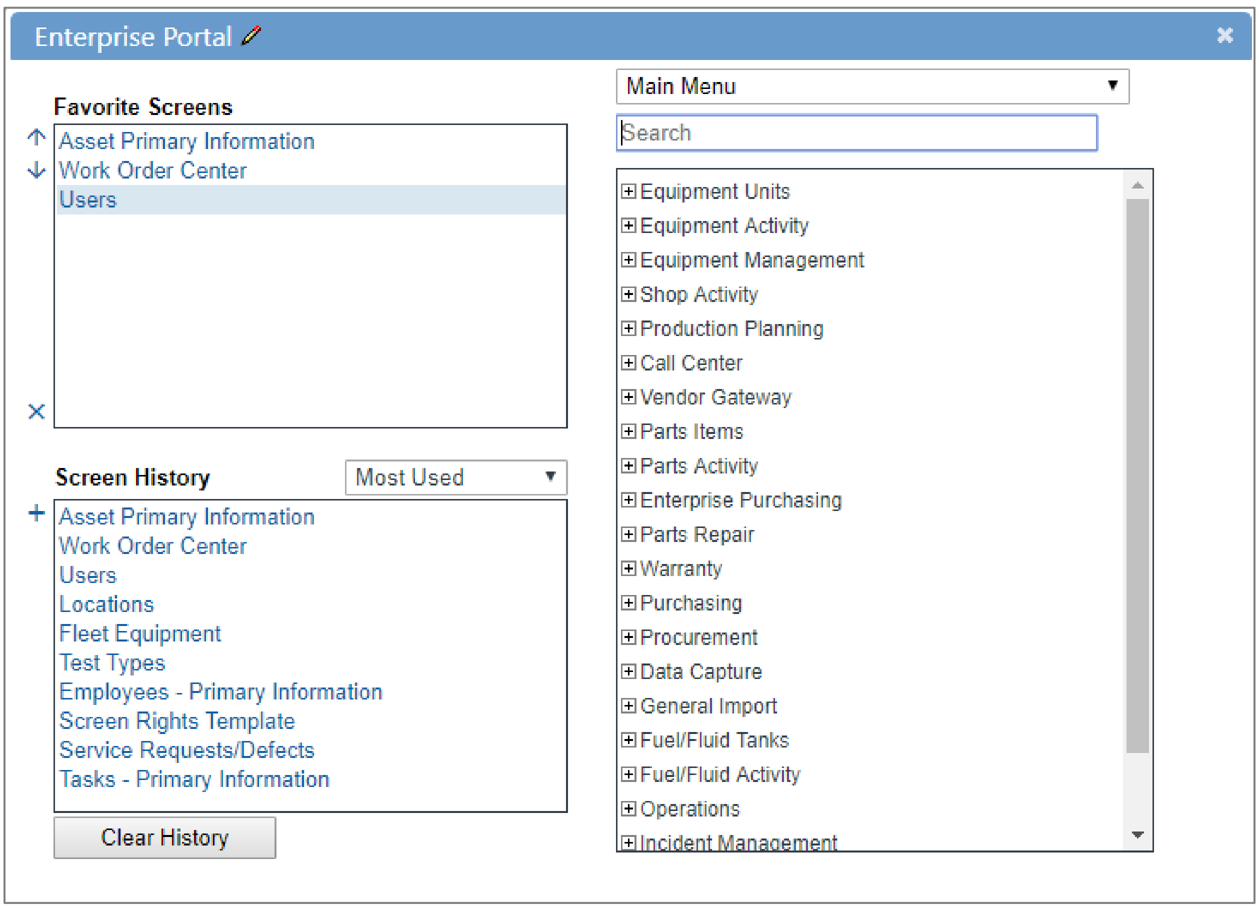
The aim of the Enterprise Portal module is to provide basic screen-level access to the core application logic and features. It allows users to open screens to view, insert, update, copy, or delete information (controlled by system access rights). Users may define default filters and sort criteria, export data to Excel, and perform other tasks.

Main Menu Screen

The Enterprise Portal menu screen typically consists of a screen list, a Favorite Screens list, and a Screen History list. Based on your organization's individual configuration, there may be additional or fewer elements on your screen.

The shortcut offers alphabetical and screen list searchable menus with a quick search that displays results while typing.

⚠ It is necessary to allow popup blockers for your web instance to ensure the menus work as designed.



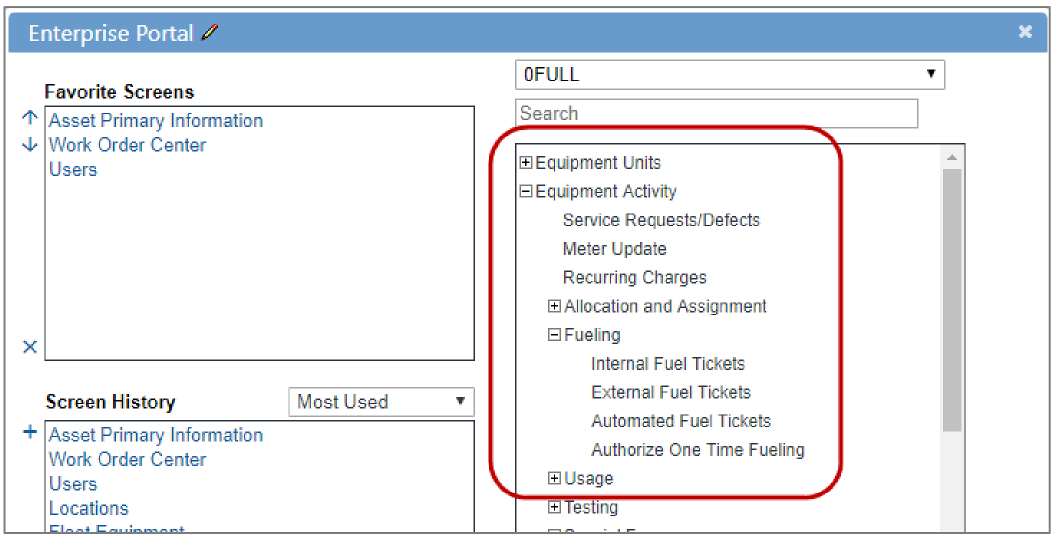
The shortcut's search feature increases efficiency and works with out-of-the-box and custom menus. Use the keyboard arrows or the mouse to select the desired search result.

The Enterprise Portal remains open until the user closes it with the X in the upper right corner or selects a menu item. The menu also remains down and selected for the item most recently chosen when you return to Enterprise Portal (assuming the context has not changed since the last search).

Screen List

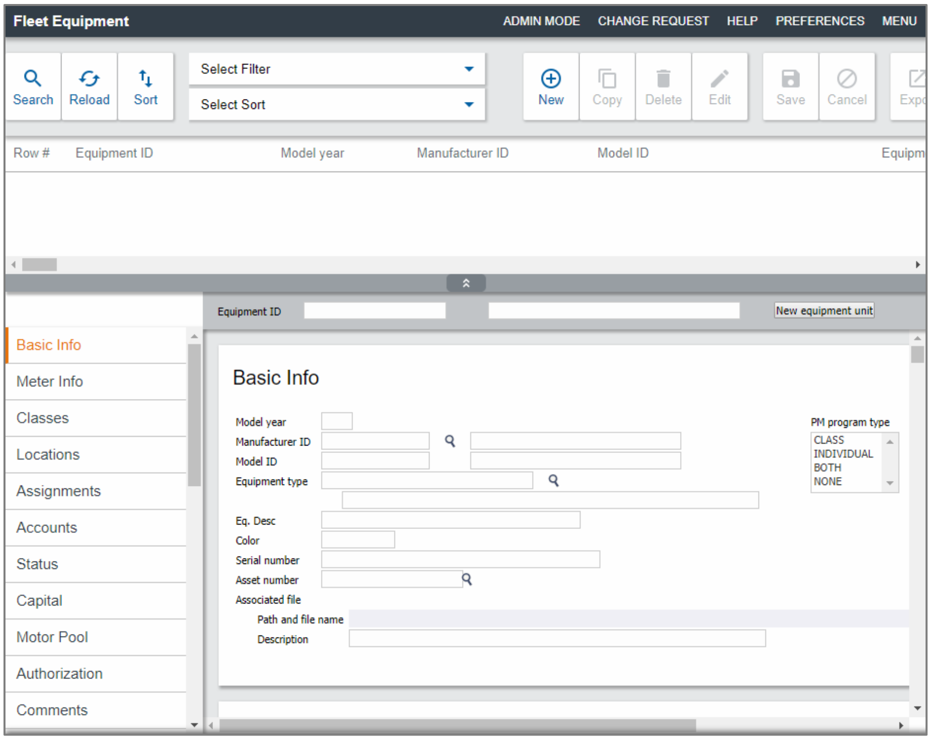
The screen list provides the main access into base functionality. The structure of menus, submenus, and screens is configurable by your organization.

1. Menus have expandable plus ⊞ icons next to them. Click on the icon to drill into the menu.



2. Click a screen name to open the screen.

   For example, when you click the Fleet Equipment screen link in the menu, the Fleet Equipment screen opens in a new window as shown in the screenshots below:



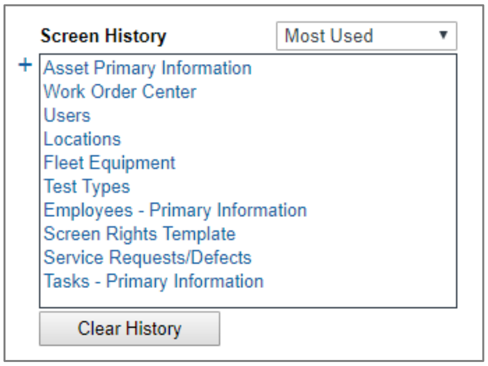
⚠ If you open a screen from the menu, a new window opens for the screen. If that screen is already open, a dialogue box opens. This dialogue gives you three options:

- **Cancel:** Cancel closes the dialogue and does nothing.
- **New Screen:** New screen opens a new EP window to the screen.
- **Use Open Screen:** Reuses the currently open screen.

See the Enterprise Portal Screen Basics section below for details about interacting with an Enterprise Portal screen.

History

Enterprise Portal keeps track of which screens you open (as an individual user ID) and the number of times you open each window. Once you've opened the Fleet Equipment screen as in the example above, you will see Fleet Equipment listed in your History list upon returning to the Main Menu screen (and refreshing your browser).



As you open other screens, those screens will also appear in your History list.

By default, your History list is sorted with the **Most Used** screens on top (based on number of times the screen has been opened by you). You may use the drop-down to switch your History list to sort by **Most Recent**, with the screens opened most recently on top:

To operate in the History list:

1. To open a screen in your History list, double-click it. The screen will open as if it were clicked in the Main Menu.

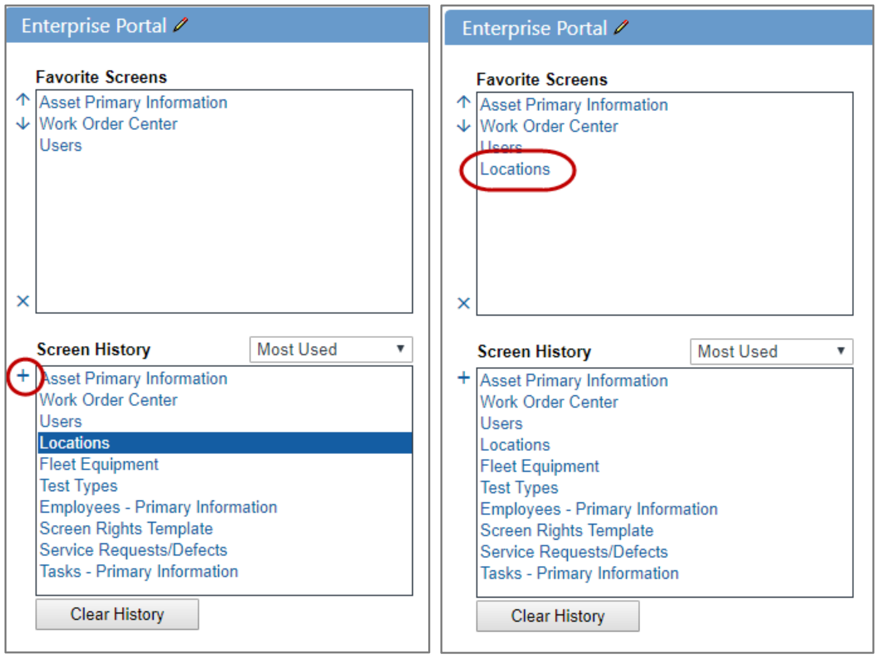
2. To clear the history, click **Clear History**.

   Your History list will follow your login wherever you go. It is stored in the database and not on the local client machine.

Favorites

Screens that you access the most often may be added to your Favorites list for easy access. Screens are upgraded from your History list into your Favorites list (i.e., a screen must first be accessed and in your History list before you can add it to your Favorites).

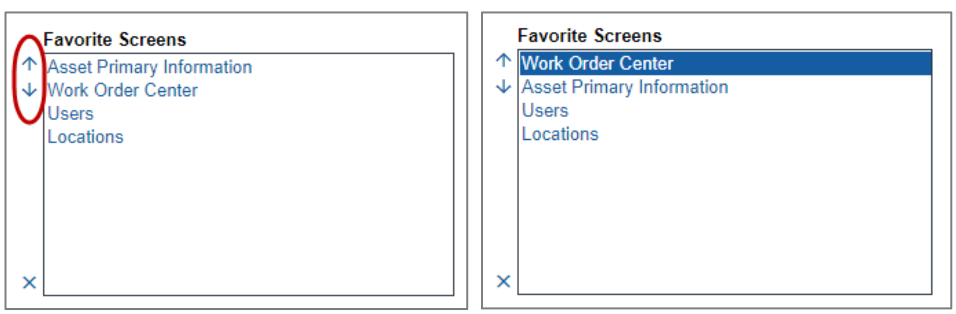
1. To add a screen to your Favorites list, highlight the screen in your History list and click the icon as shown in the screenshots below.



2. When you have multiple screens in your Favorites list, you can rearrange the order of those screens.

   i. Highlighting a screen you want to move.

   ii. Click the up or down arrow icons as shown in the screenshots below.



3. To open a screen in your Favorites list, double-click the screen name.

   The screen opens as if it were clicked in the Main Menu.

   Your Favorites list will follow your login wherever you go. It is stored in the database and not on the local client machine.

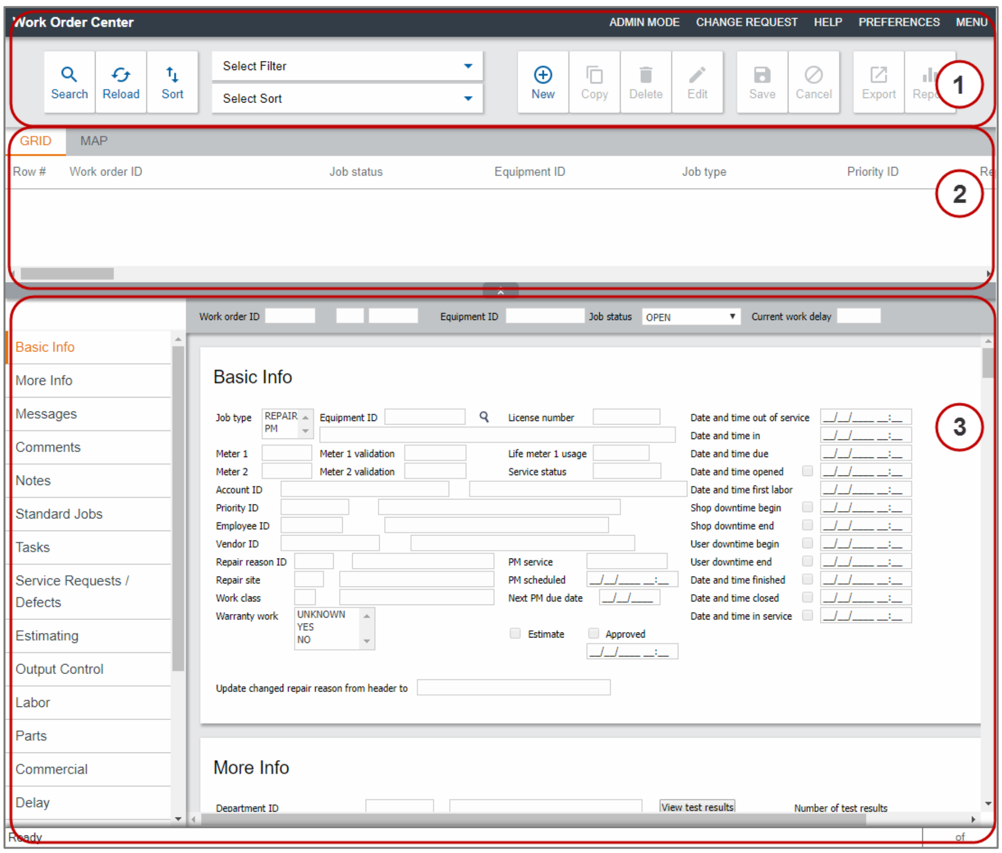
4. To delete a Favorite screen from the Favorites List, select the screen and click the **x** icon.

Enterprise Portal Screen Basics

This section describes how to use the Enterprise Portal screens. If you are familiar with the GUI, many of the features will be familiar to you.

All Enterprise Portal screens have been designed to have the same look and feel as the GUI. It was designed intentionally to ensure that once you understand how to use one screen, you understand how to use them all (for example=, looking up a fleet equipment record is the same as looking up a part record; adding a new work order is the same as adding a new fuel ticket, etc.).

Each Enterprise Portal screen consists of three basic areas:

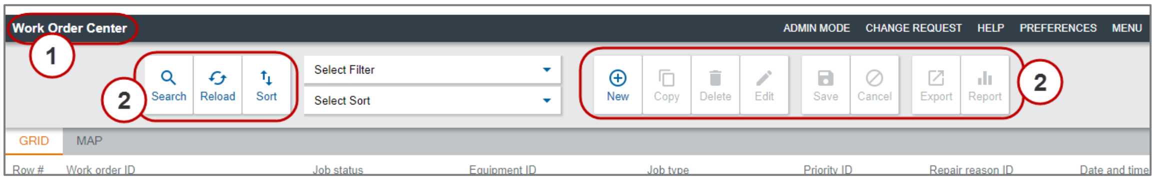


- **1 - The Toolbar** contains a grouping of buttons, hyperlinks, and choice lists that provide all screen functions and actions.
- **2 - The Grid** is where data, when pulled up through the Filter feature, appears. Click on a data record in the Grid to have detailed data about that record displayed below in the Main Screen. The order and width of columns in the Grid may be customized by each user. If configured, the Grid area may also display other tabs for different options to view data. The different views (Grid, List and Map) are explained in the View Tabs section.

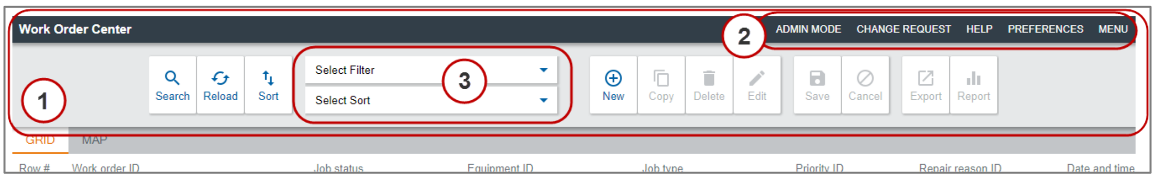
- **3 - The Main Screen** serves as the area of full detail display, data update, and new data input.

The following screenshots provide more detailed overview of the Basic Enterprise Portal screen and each of the three basic areas:

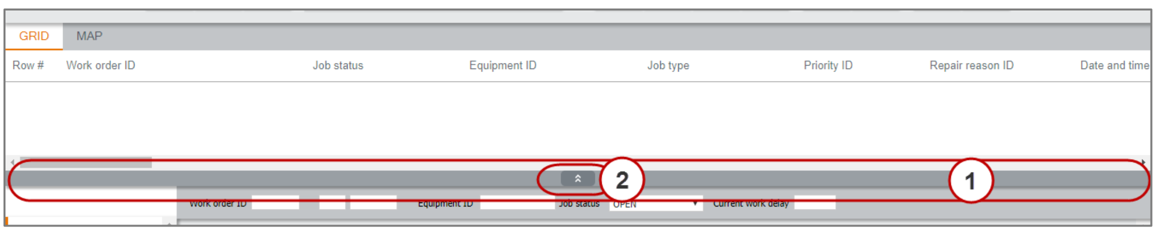
- Screen Name (1) and Screen Data Buttons (2)



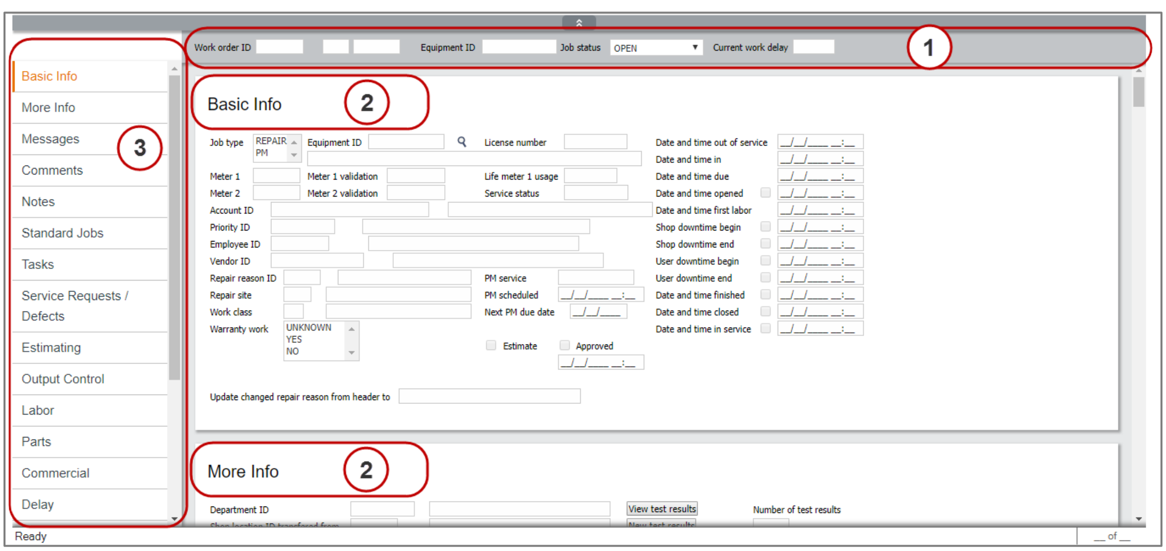
- Toolbar (1), Menus (2), and Filters/Sort (3)



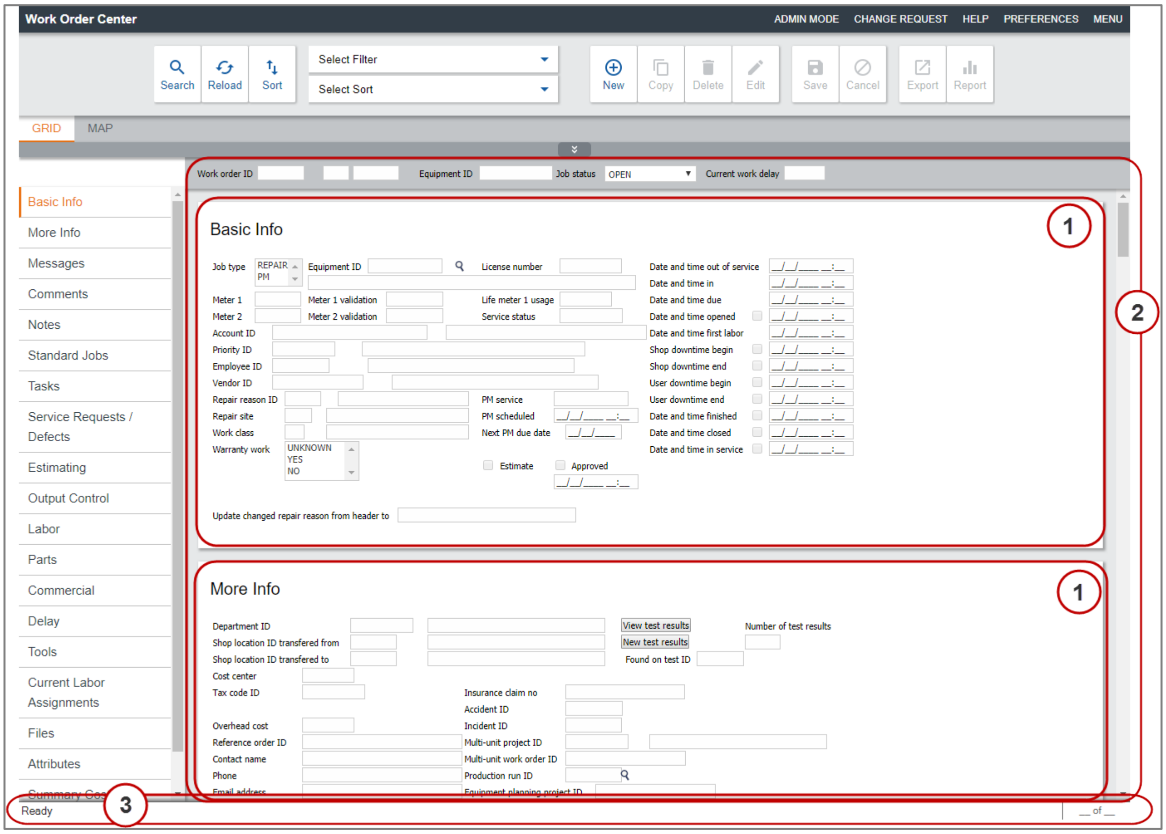
- Grid Resizer (1) and Grid Toggler (2): Click and drag the resizer to resize the grid at the top of the screeen where the data list displays. Click the toggler to expand or hide the grid.



- Detail Header (1), Tab Name (2), and Tabs List (3): The detail header is always visible no matter where you scroll in the tabs.



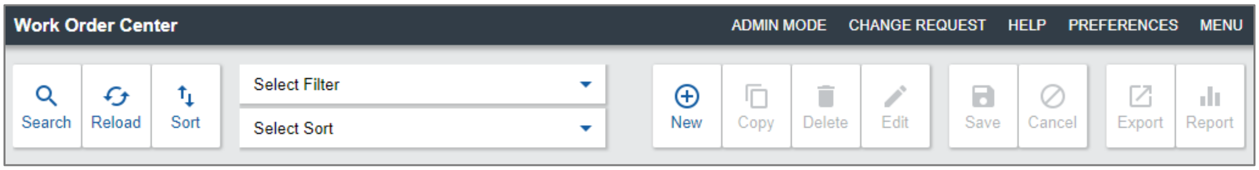
- Tabs (1), Detail area (2), and Status Bar (3): The status bar displays errors and feedback for the screens.



The sections below provide an in depth look at each of the 3 basic Enterprise Portal screen areas.

The Toolbar

Here is an overview of the buttons and links available in the Enterprise Portal Toolbar. You will notice that many action buttons have keyboard shortcuts to allow data access without using your mouse:



Search (Filter and Get Data)

Keyboard shortcut: **Alt-F**

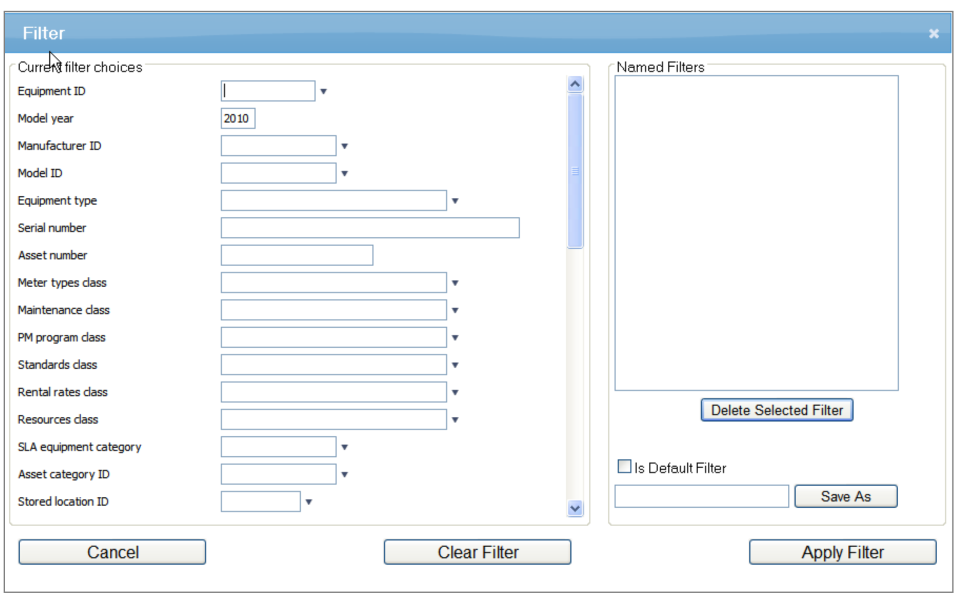
Click **Search** to query the database and return records of data that match your request.

Most screen lookups are performed using the search button (using **Reload** alone usually provides more data than one needs).

If there are no filter options entered, the filter cannot be saved.

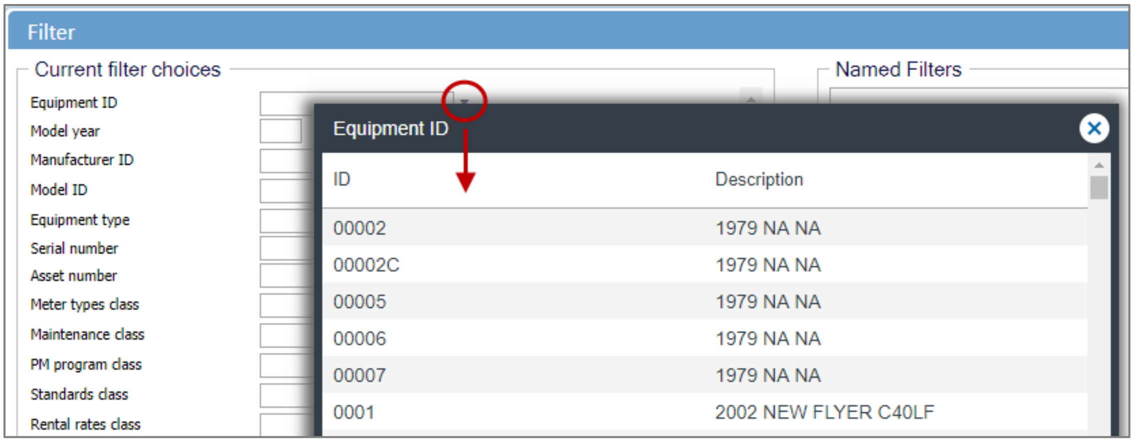
Each Enterprise Portal screen has a different Filter dialog box, with search criteria matching the screen. The search elements that appear on any given screen are editable (i.e., system administrators have the ability to add or remove fields from the Filter dialog.)

The following Filter dialog example is from the Fleet Equipment screen:



To look up data on the screen:

1. Complete the Filter dialog with appropriate criteria
2. Click the **Apply Filter** button.
3. On fields showing drop-down buttons to the right, select criteria from the lookup dialog:



When using a choice-list, the values come into the list gradually, working similar to the GUI.

4. When you see the data you want, click on the record to stop the additional records from coming in.
5. At any time you can also enter additional filter information and click the **Apply Filter** button to refresh the choice list values.
6. You can use wildcards in the Filter dialog to enhance your search capabilities:
   - The percent wildcard (“%”) may be used in place of any number of unknown characters. For example, searching for Maintenance Class = “HVY%” will return records where Maintenance Class is equal to “HVY-001”, “HVY-SPECIAL”, and “HVY”.
   - The underscore wildcard (“_”) may be used in place of a single unknown character. For example, searching for Maintenance Class = “BUS-_” will return records where Maintenance Class is equal to “BUS-1” and “BUS-B”, but will not return records where Maintenance Class is equal to “BUS” or “BUS-PARA”.
   - The above two wildcards may be used together in any combination. For example, searching for Maintenance Class = “%BUS%-_ _” will return records where Maintenance Class is equal to “FIXED BUS-91” and “BUS-PARA-03”.

Reload (Get Data)

Keyboard shortcut: **Alt-G**

The **Reload** button queries the database and fills the Grid with rows of data. As the data loads, a message indicates it is loading and a **Stop** button displays. Click the **Stop** button to stop the reload process.

If filter criteria is already set in the Filter dialog, then this filter criteria is used. If no filter criteria are set, an unrestricted query (i.e., “select all”) is performed.

If sort criteria is already set in the Filter dialog, then this sort criteria is used. If no sort criteria are set, the screen’s default sort order is used.

- Use one of the following methods to perform an unrestricted Get Data search:
    - Click the **Reload** button before applying any filters (including saved filters)
    - Click the **Search** button and then click **Apply Filter** (with no filters set).

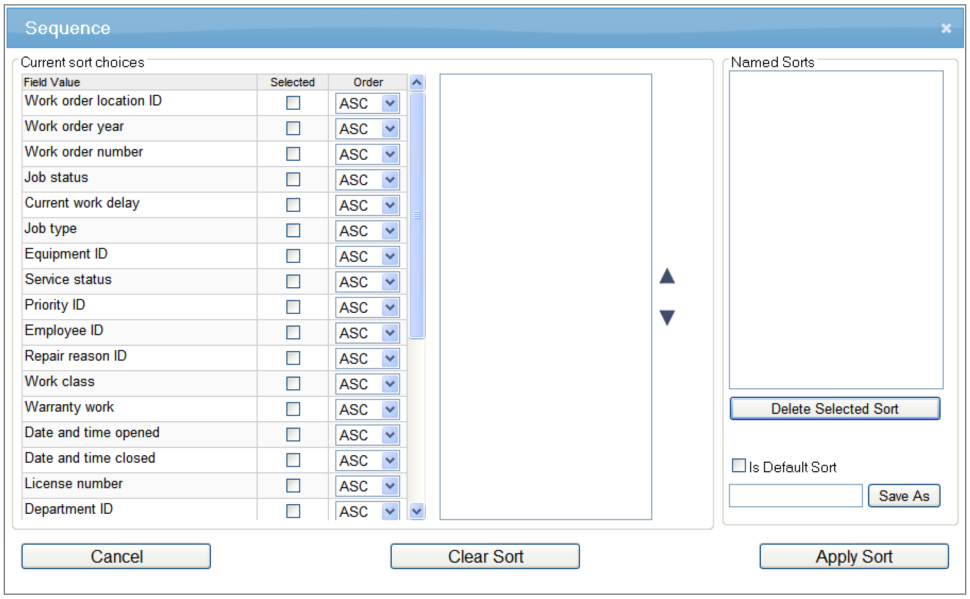
Sort Data

Keyboard shortcut: **Alt-O**

When you click the **Sort** button, the Sequence dialog displays. You may use the Sequence dialog to present data in the Grid sorted in an order other than the screen’s default. For example, the Work Order Center’s default sort order is by datetime in, descending. To change this to sort by work order status, open the sequence dialog.

Each Enterprise Portal screen has a different Sequence dialog box with criteria that matches the screen. The elements that appear on any given screen are editable (system administrators have the ability to add or remove fields from the Sort dialog).

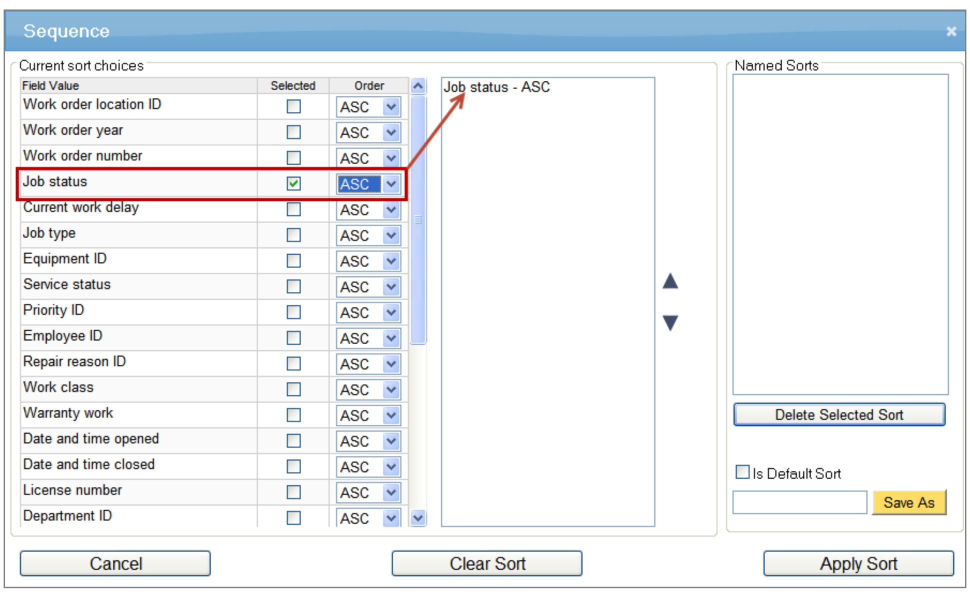
The following Sequence dialog example is from the Work Order Center screen.



To change the sort order:

1. Check the **Selected** box next to that field in the Sequence dialog that you wish to sort by. In the example below, the sort will now be done by job status.

   The sort criteria will be added to the area to the right of the field list.

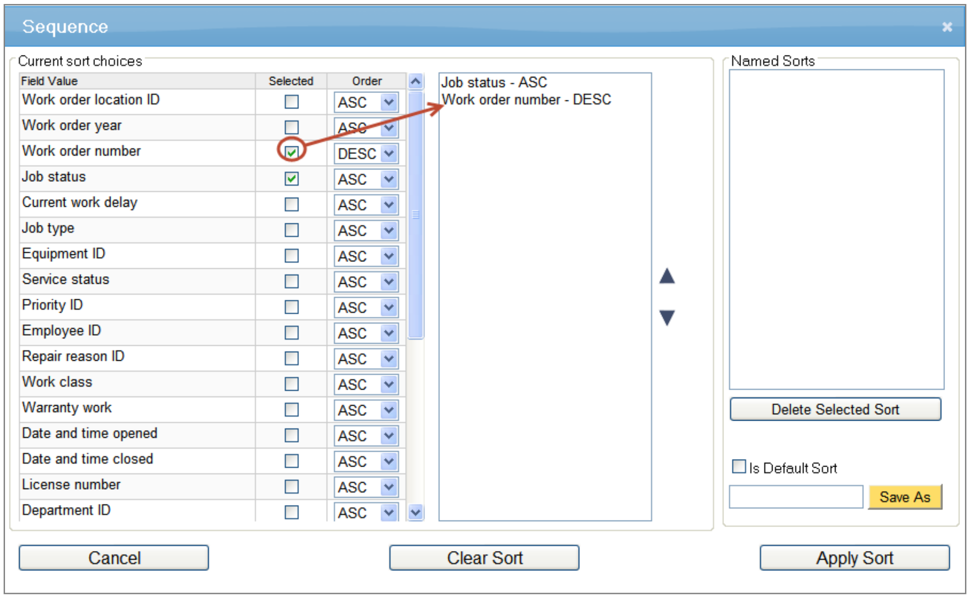


Check the Selected box next to a field to change the sort order to the field

2. At this point, when you click the **Apply Sort** button, you return to the Grid, but retrieved data will sort according to job status.

3. Any number of sub-sort criteria may be defined in the Sequence dialog. For example, to have the work order list sort first by Job Status, and then within Job Status by Work

Order Number, Descending (i.e., higher Work Order Number at the top), simply add the sort criteria to the dialog. For the Work Order Number field, first change the **Order** to DESC using the drop-down list, then click the **Selected** checkbox.

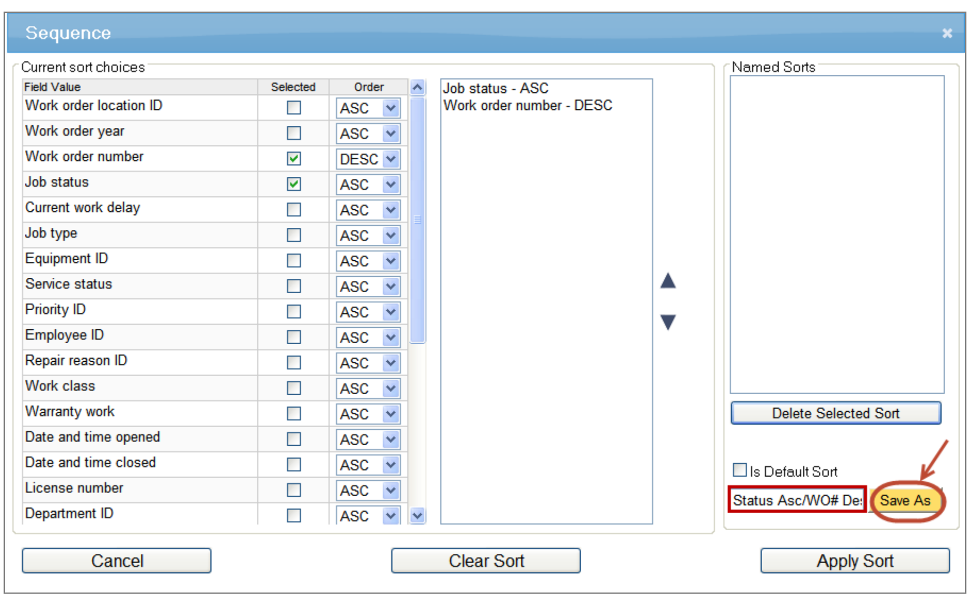


To change the sort criteria.

1. In the list of defined sort criteria, you may change the order of sorts and sub-sorts. To do this, select the sort criteria row.

2. Click the **Up** or **Down** buttons.

3. Enter a name for the sort and click the **Save As** button to save the newly-named sort.



The newly Named Sort shows in the Named Sorts section of the Sequence dialog and in the Sort field on the toolbar.

Filter/Sort Drop-Downs

Several filter and sort requests will be used only one-time, but there are many examples of filter and sort requests that you need to make every day, or jump between during the course of any given day.

Examples include the following:

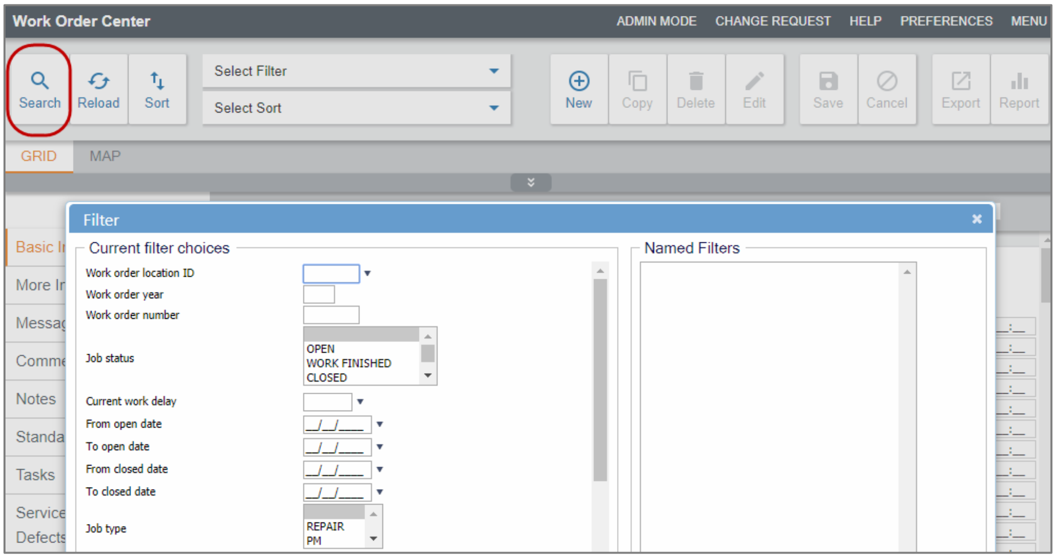
Common Filter Options	Common Sort Options
Open work orders at my shop	Work orders by date due
Active equipment in my department	Equipment by serial number
Outstanding purchase orders	Parts by keyword

Each Enterprise Portal user has the ability to define, save, and use any number of saved Filters and Sorts using the **Named Filters** and **Named Sorts** areas of the Filter and Sort dialogs, and the predefined Filter/Sort drop-downs on the toolbar.

To create a Named Filter, follow the steps below:

1. Click the **Search** button.

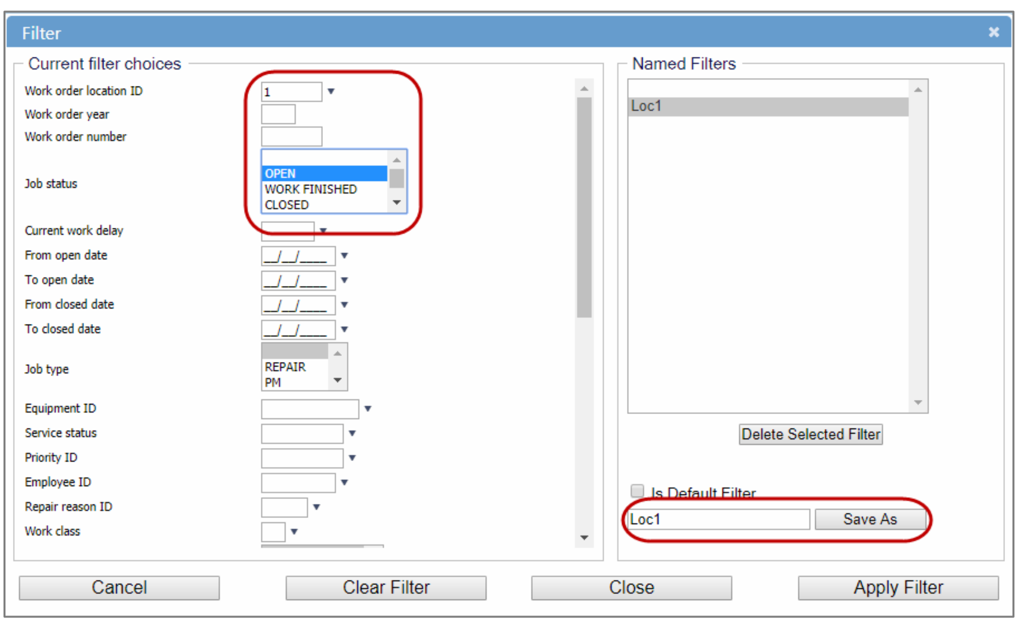
   The Filter dialog appears.



   i. Enter the filter criteria on the left side of the Filter dialog.

   ii. In the Named Filters area, enter a name for the filter in the field.

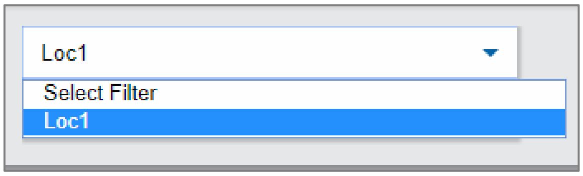
   iii. Click the **Save As** button.



   The new filter displays in the Named Filters list after you click ***Save As****.*

*The **Named Filter** now displays on your Enterprise Portal drop-down list of predefined filter criteria.*

2. To use this filter, select it from the list.

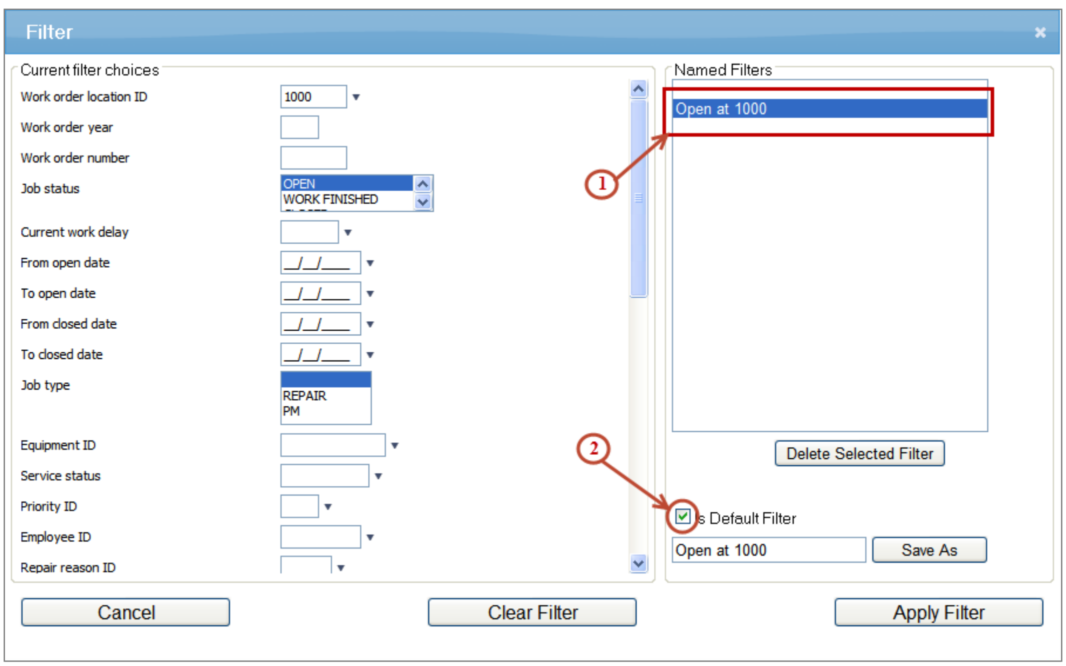


The filter loads data automatically after selected.

3. To create a named sort, follow the same steps as creating a named filter.

Named filters and named sorts may be used in conjunction with each other. For example, you could select a named filter of **Open Work Orders** and a Named Sort of **Date Due - Descending**.

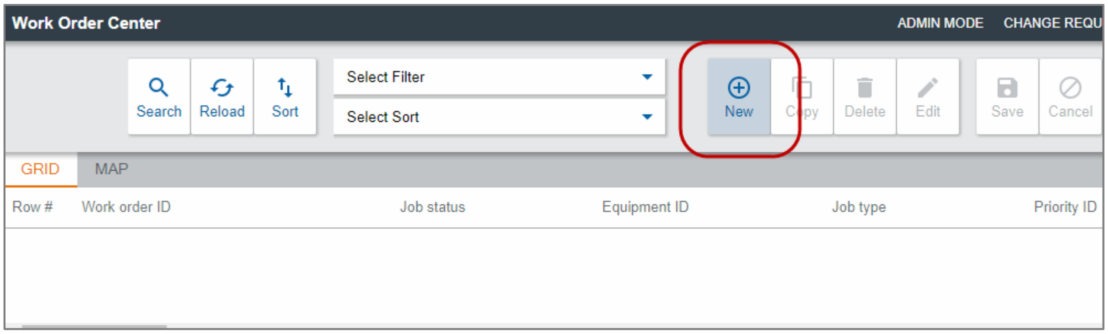
4. To declare a named filter or named sort as a user's Default Filter/Sort, select the named filter and sort in the Filter/Sort dialogs, and check the **Is Default Filter/Sort** box at the bottom of the page.



New

Keyboard shortcut: **Alt-N**

1. To add a new record into the screen, click **New**.

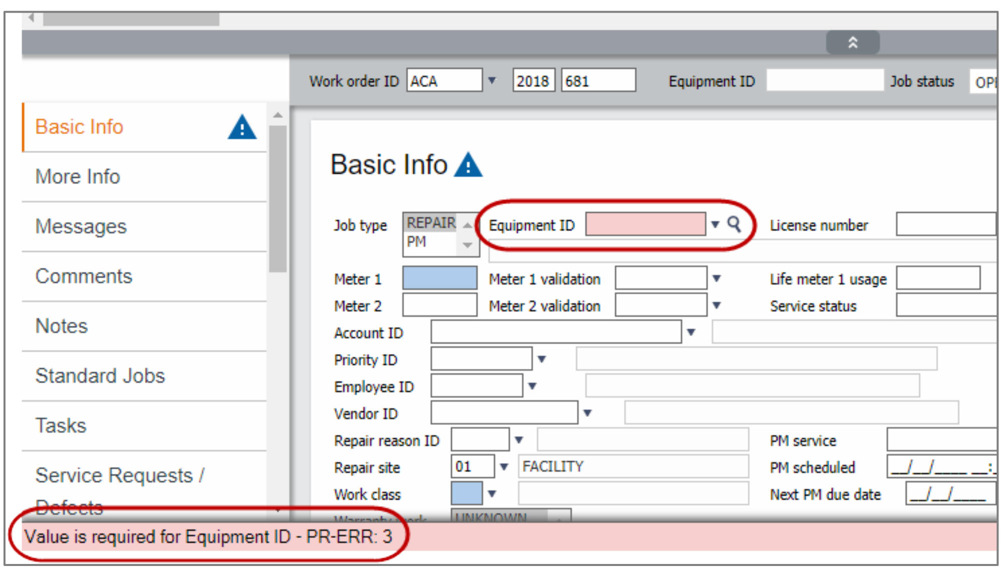


All fields in the Detail area of the screen clear, allowing user entry.

Fields that are flagged as required through the Administrator Mode via the GUI may be highlighted.

2. After you finish entering all data as needed, click the **Save Data** button to add the record to the database.

If any errors or unfulfilled requirements are determined, they will display along the bottom of the screen.



*When all fields are correct and the record has been added to the database, you will receive a **Successful Insert** message in the Message Display window:*

3. If you wish to back out of your data insert without adding the record to your database, click the **Cancel Update** button, or use the keyboard shortcut **Alt-Q**.

Copy

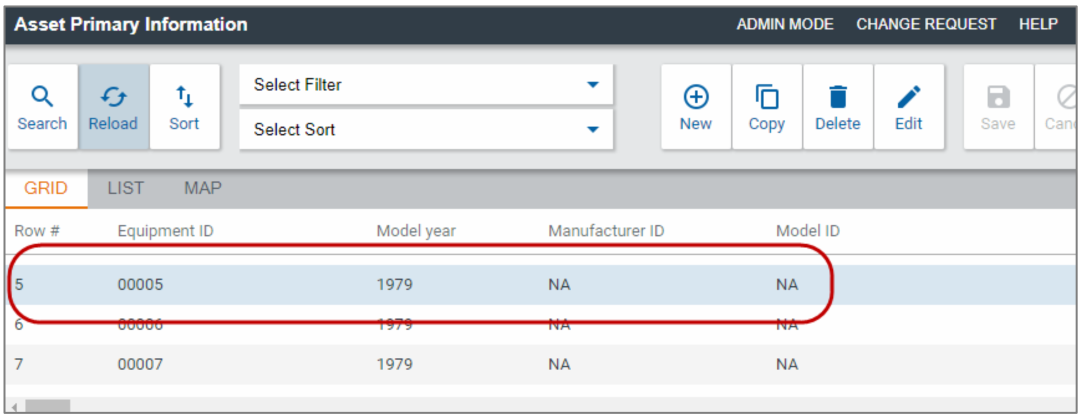
Keyboard shortcut: **Alt-Y**

Often, when adding new records to the database, it is useful to start from an already-entered record rather than starting from scratch.

To add a new record based on a previous record:

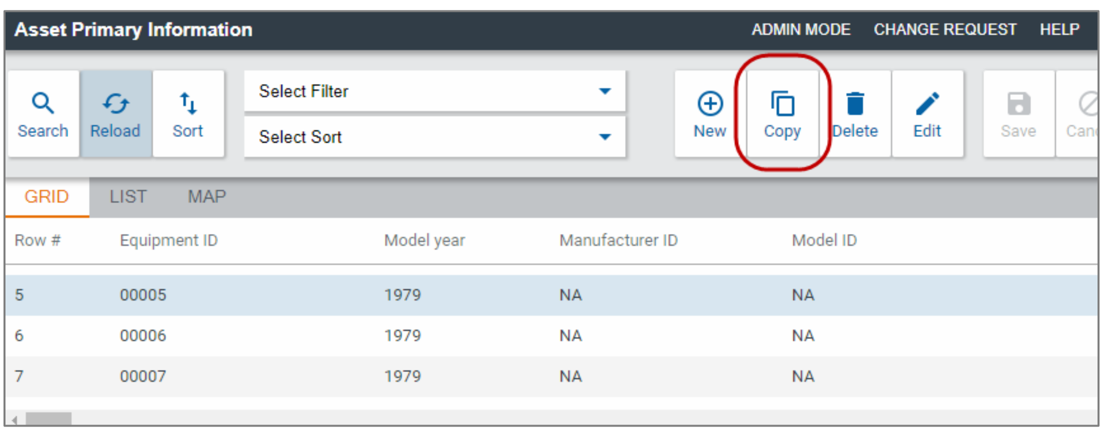
1. Filter on the record you wish to use as a starting point.

2. Highlight that record in the Grid.



3. Click **Copy**.

   This clears only those fields in the Main Screen that are required for re-entry, leaving all other data values in place.



4. Continue to add data just like when adding a new record. Copying records is simply an easy way to add multiple similar records to the database.

5. If you wish to back out of your data copy without adding the record to your database, click the **Cancel Update** button or use the keyboard shortcut **Alt-Q**.

Delete

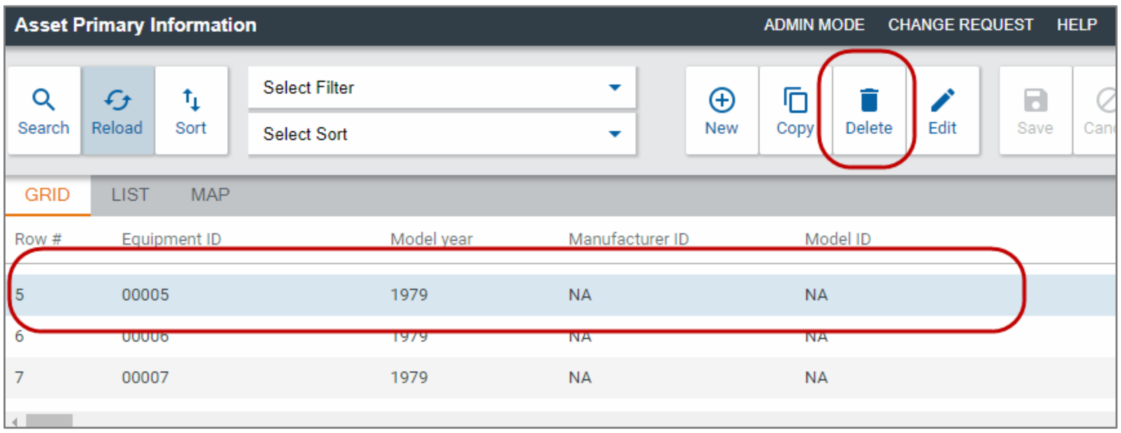
Keyboard shortcut: **Alt-D**

Use this button to remove a record from the database.

Typically, very few system users are given access to this button.

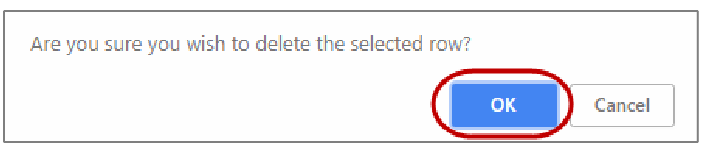
To delete a record from the database:

1. Filter to retrieve the necessary records.
2. Select the row in the grid and click **Delete**.



You are prompted with an "Are you sure…?" dialog.

3. Click **OK** to continue.



The record is deleted and Successful Delete shows at the bottom of the screen.

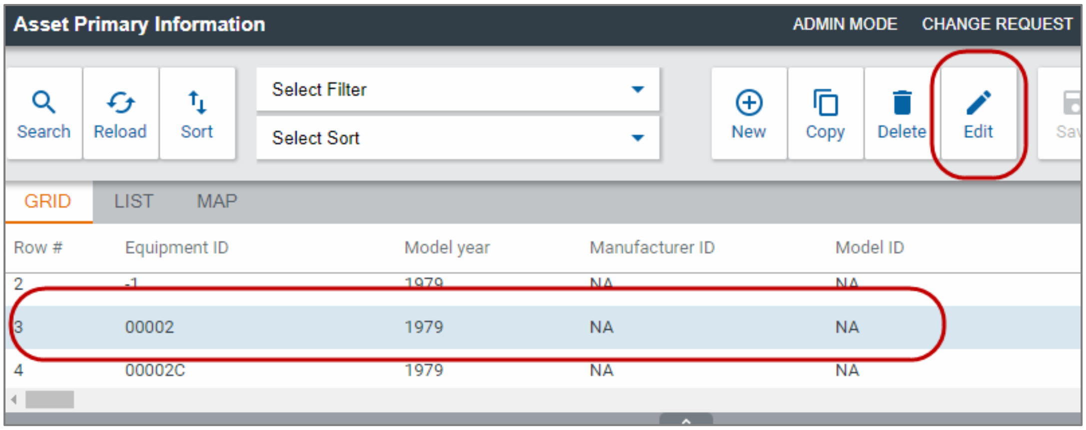
Edit

Keyboard shortcut: **Alt-U**

Single Record Editing

To update an existing record in the database:

1. Filter to obtain the desired data records.
2. Highlight the row in the Grid.
3. Click the **Edit** button.



This unlocks all data fields in the Main Screen and allows you to make changes to the fields that allow updating.

4. To save your changes, click **Save** or use the keyboard shortcut **Alt-S**. All normal data validation rules apply.

5. If you wish to back out of your data insert without adding the row to your database, click **Cancel** or use the keyboard shortcut **Alt-Q**.

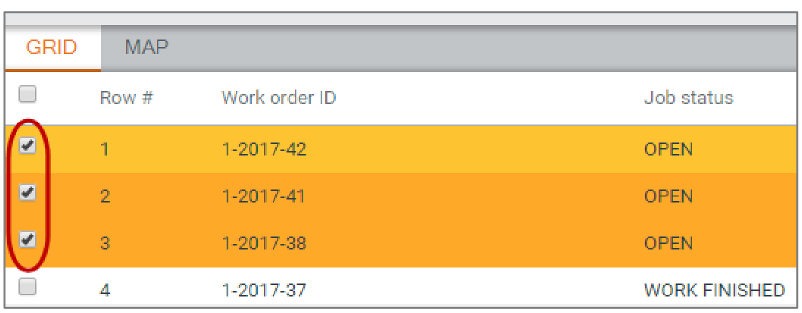
Bulk Record Editing

Bulk record editing allows you to edit more than one record at a time. To perform bulk editing, the screen must have the **Bulk edit** option enabled on the Screen Rights Template screen.

To update multiple records in the database:

1. Search or filter to obtain the desired data records.

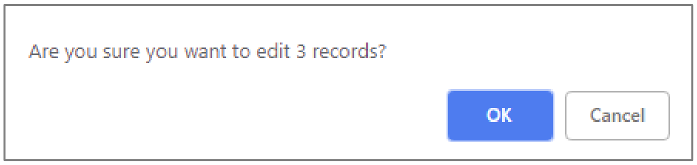
2. Check the boxes to highlight the rows in the Grid.



Records that are selected for bulk editing are highlighted in yellow.

3. Click **Edit**.

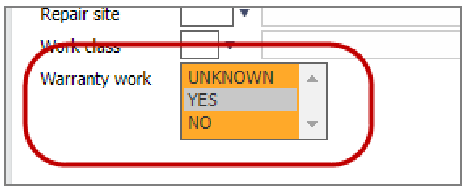
A message displays verifying that you want to edit the selected records.



4. Click **OK**.

5. Edit the fields as needed. Information entered in these fields will be edited in all selected records as entered.

   If you select an option in a list box that does not have a blank setting, you cannot undo editing this option. To cancel editing a list such as the one below, you must cancel the bulk editing, and start over. You will lose any unsaved changes.

   Note: Previously entered table data rows cannot be updated with bulk editing. However, you can enter new data rows in this mode.

   Note: In bulk editing mode, you cannot bulk remove existing data from fields. If a field is left blank in bulk editing mode, the system ignores that field as not having changes to apply. There are no changes made to an individual record's values for any ignored fields. If a field has data that needs to be removed in a record, this must be done individually.

6. If you changed a field that you no longer want to change, delete the information from that field. The field will return back to white and will not change any records when saved.

7. Once you are done editing, click **Save**.

   A message displays verifying that you want to change the selected records.

8. Click **OK**.

   The records are updated.

   Note: Since records are changed one by one in the system to ensure data is recording correctly, and checking for errors along the way, this step can take an extended amount of time to process. The system checks while records are updating to avoid timing out during this process.

The following icons will display next to changed records according to their edit status.

Note: Make note of the records that need to be addressed, as the icons will be removed after the next refresh of the page (after either a fresh search, reload, or saving another item).

Status Icon	Description
	An error has occurred with the update for this record and must be fixed manually. If an error occurs, no changes are made to the record and must be fixed manually. Hover over this icon to see the error or reason why the record was not updated.
	The record has been updated successfully.

Save

Keyboard shortcut: **Alt-S**

This button is used in conjunction with the buttons **New, Copy**, and **Edit** defined above. The **Save Data** button takes the updates you have entered and attempts to commit them to the database. If any errors or validations are encountered while processing, they are displayed at the bottom of the Main Screen.

Cancel

Keyboard shortcut: **Alt-Q**

This button is used in conjunction with the buttons **New**, **Copy**, and **Edit** buttons defined above. It is used to back out of a data insert or update. If you are in the middle of entering or changing data and wish to exit the edit mode, use this button.

Export

Once you have data in the Grid, it is often useful to export that data to a file for reporting purposes or emailing to others. The **Export** button exports to CSV (comma-separated values).

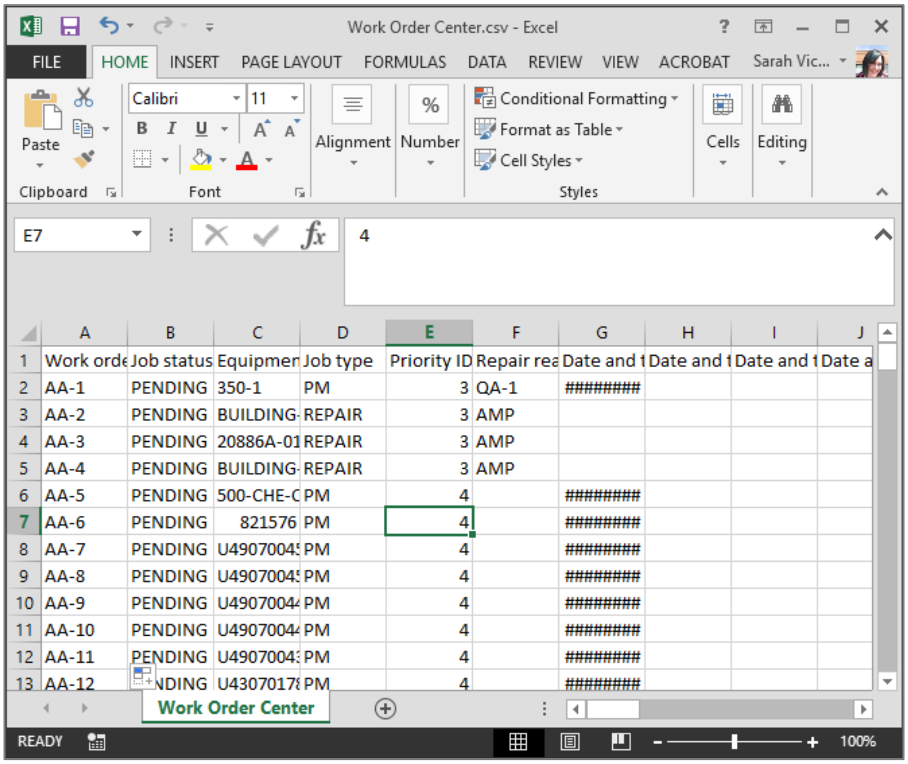
To have the data open in MS Excel automatically, it is necessary to associate MS Excel as the default program for .CSV files

To export data to a file, follow the steps below.

1. Filter on data you want to export.
2. Click the **Export** button.

3. Depending on the browser, the file downloads, or you can select whether you want to save the file to disk or display it on-screen.

   *Once the item is downloaded, and either opens automatically or you click **Open**, the Enterprise Portal opens whatever application is associated with CSV files on your PC (typically, Microsoft Excel) and displays the filtered grid data in that application.*



Report

Keyboard shortcut: **Alt-R**

On any given Enterprise Portal screen, the **View Screen Report** button may be linked to any related Web Modules report and used to execute that report from the screen. Please see [Appendix B – The Enterprise Portal View Screen Report Feature] for a full description of how to set up and use this button.

Stop Button

When using Enterprise Portal, you may click the **Stop** button to stop the data retrieval process once you have come to the data desired.

Admin Mode

Use Admin mode to control UI in the Enterprise Portal screens. You can choose to hide or display fields, change admin options, field titles, etc. To use admin mode, you must have administrative rights in the Enterprise Portal.

For more information, refer to the Admin Mode section.

Change Request

Click this button to make a Change Request. You may choose to make a change request to the Selected Record (updates) or to a New Record (inserts).

For more information on making change requests, see the Web Modules *Change Requests - Reference Guide: Requesting Edits and Requesting New Records sections.*

Help

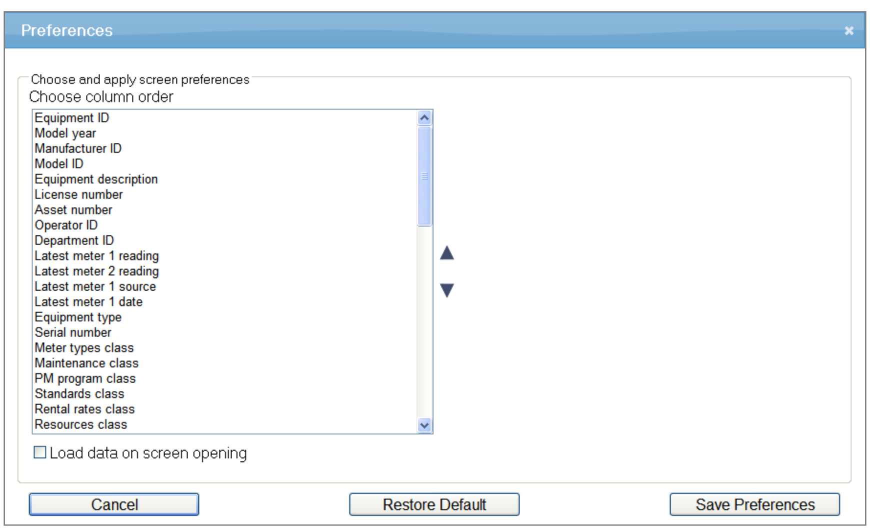
Keyboard shortcut: **Alt-H**

Click this link to access the screen's Online Help page. Enterprise Portal Online Help is a typical online help engine, allowing screen-level help and general help searching/indexing.

Preferences

Keyboard shortcut: **Alt-P**

Each Enterprise Portal user has the ability to set certain screen-related preferences. To access the page where these settings are made, click the **Preferences** link:



The following settings may be adjusted:

- **Column Order:** the order of the columns displayed in the Grid may be adjusted by the user. For example, if on the Fleet Equipment screen, you want the Operator ID to appear closer to the start of the list, highlight Operator ID in the list and click the **Up** button to the right. To return the column order to default, click **Restore Default**;
- **Load data on screen opening:** on certain screens, it may be desirable to have data automatically load when the screen is opened. To have this screen obey this behavior, check this box. If you have determined a Default Filter or Default Sort (see above), they will be used in this automatic load process.

Menu

Keyboard shortcut: **Alt-M**

Often when using Enterprise Portal, you will eventually open several screens. The **Menu** link (available on all screens) is a convenient way to cut through all screens and jump directly back to the Enterprise Portal Main Menu screen.

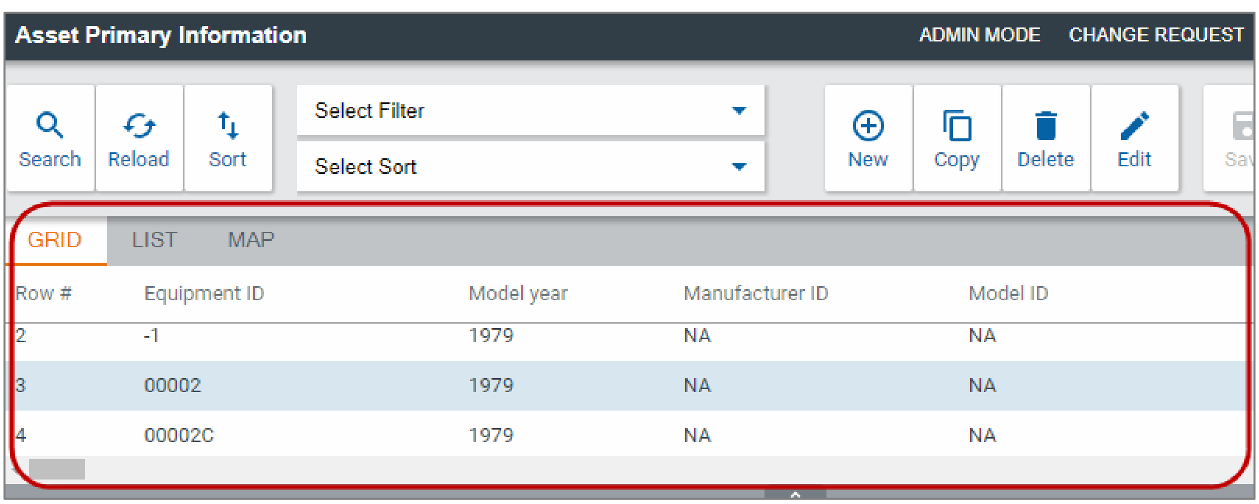
If your Web Modules session has expired (timed out), clicking this link will take you to the Web Modules login page.

View Tabs

When you request data from the database, the information is displayed in the area below the toolbar. Data defaults in the Grid view. Depending on your configuration, your organization may also choose to show data in the List or Map view. All three view options are outlined below.

Grid View

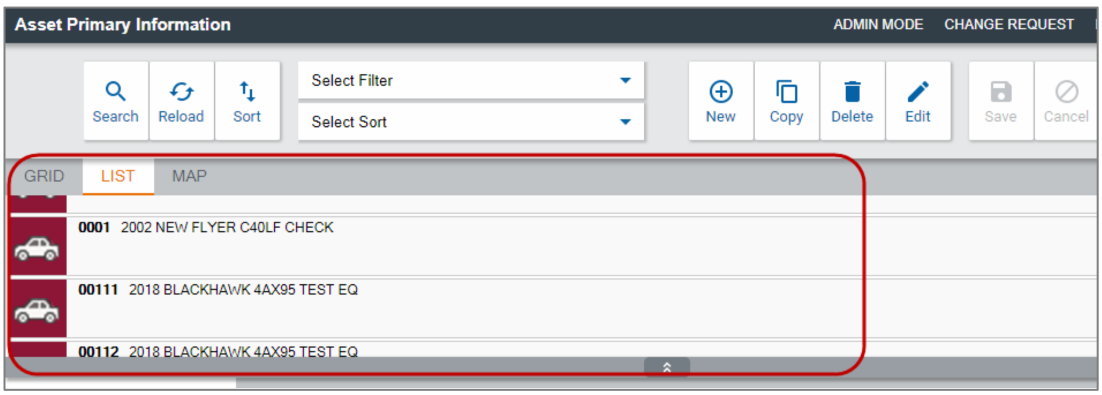
When data is requested from the database, each record is populated in the Grid view. It is a scrollable region that displays a subset of all data available for each record.



- The Grid column order may be adjusted by the user through the screen's Preferences (see above).
- The Grid column width may be altered by moving the grab arrow to the left or right at the column title.
- The data in the Grid may be exported to file using the **Export** button (see above).
- Click a record to display data related to that record in the Grid. Doing so causes all detail regarding that record to be displayed in the Main Screen.

List View

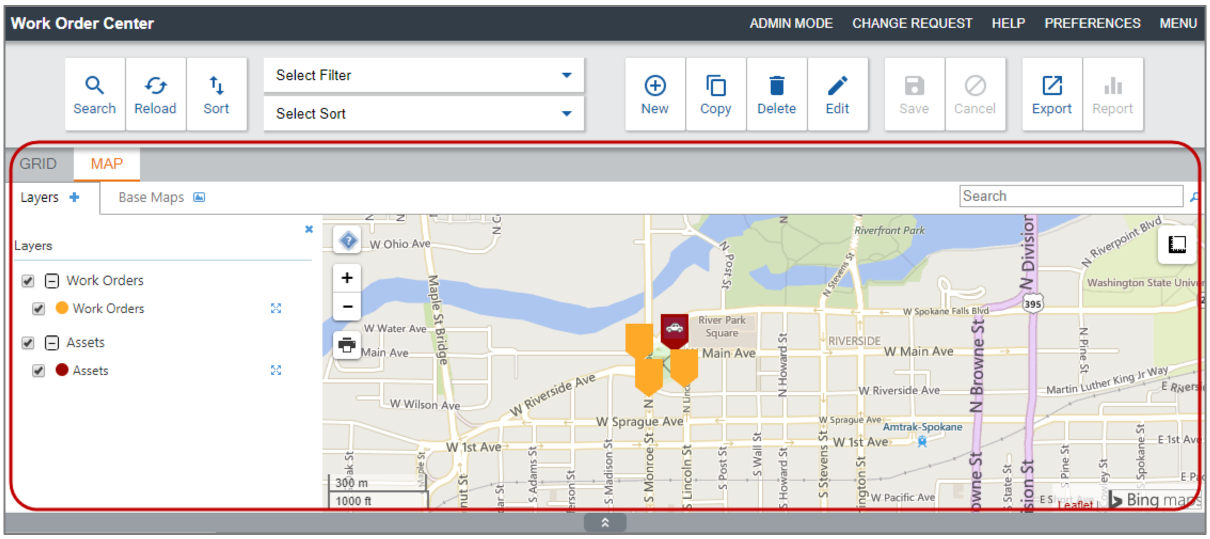
The List view can show different columns based on different data conditions for each record, and can optionally hide data from columns that are empty. The List view achieves this by displaying each record in a card catalog format instead of a tabular format.



Map View

A Map tab displays on screens where Map view is implemented. Select the **Map** tab to view the map and the associated information. The map includes options to view different layers, use different maps, make measurements, and more.

Refer to the Mapping Administrator and User Guide for more information regarding specific mapping features and buttons.



Currently, to display linear assets, the linear asset must have an associated Shape ID assigned. In the example below, The Linear Assets – Primary Information screen shows where assets are located by the red, circled number . Clicking on the number brings up a clearer view of where the assets are located, i.e., cross streets, etc. In this example, six linear assets are located at the location. Each asset is represented by a shape. Click on an asset to automatically refresh the main screen with its data.

Admin Mode

Use Admin mode to control UI in the Enterprise Portal screens and Web Modules. You can choose to hide or display fields, change admin options, field titles, etc. To use admin mode, you must have administrative rights in the Enterprise Portal.

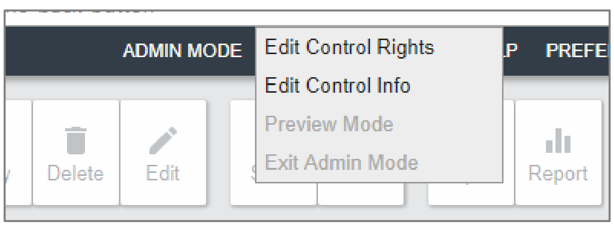
Note: Changes done in Admin mode display once you save the change in real-time without having to refresh the screen to see changes.

Starting Admin Mode

To start Admin mode:

1. On an Enterprise Portal screen, click **ADMIN MODE**.

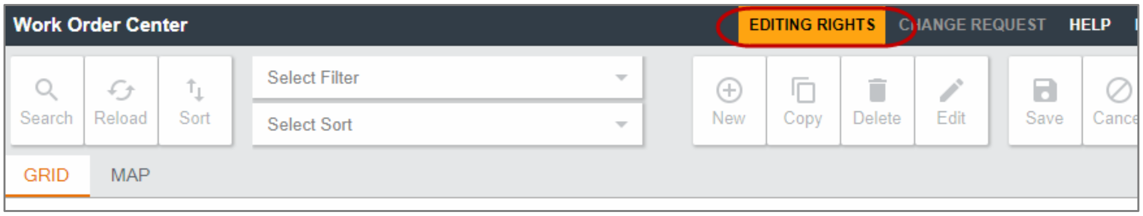
2. Four options display:



   - **Edit Control Rights:** Edit user control rights for selected fields.
   - **Edit Control Info:** Edit control information such as hiding fields and tabs.
   - **Preview Mode:** Choose a user group while in preview mode to see what that user group will see when using that page.
   - **Exit Admin Mode:** Exit any admin mode you are currently using. This option is greyed out unless you are currently in an admin mode and click **Admin Mode**.

3. Select the needed admin option.

   Admin mode changes to Editing Rights, Editing Info, or Preview Mode depending on the option chosen.



4. For more information on using the different options, refer to the options below.

Using Edit Control Rights

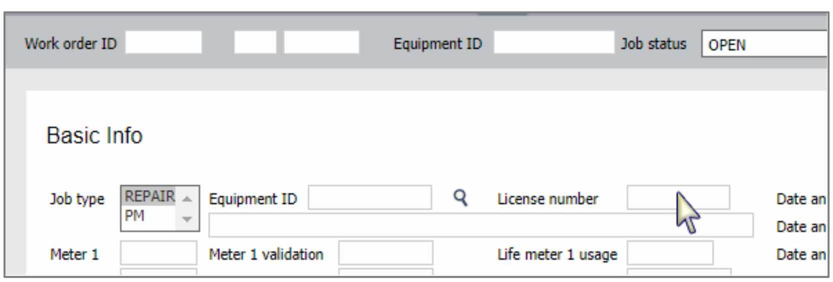
The option for editing control rights allows you to edit the rights for user groups. This changes what user groups have access rights to pages. Editing control rights cannot be accessed while editing a record or inserting a new record.

To edit rights:

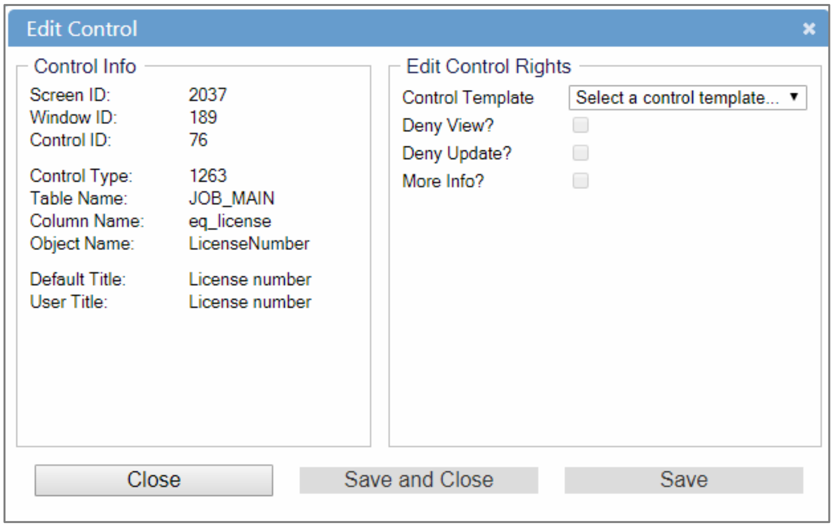
1. Start the **Edit Control Rights** mode as explained in the Starting Admin Mode section.
2. Select a template from the **Select a control template** drop-down field.

   This applies the template screen rights to allow you to see what a user assigned to the template will see on the screen. When selecting a field below, the template also loads the current options for this field as well, based on the template.

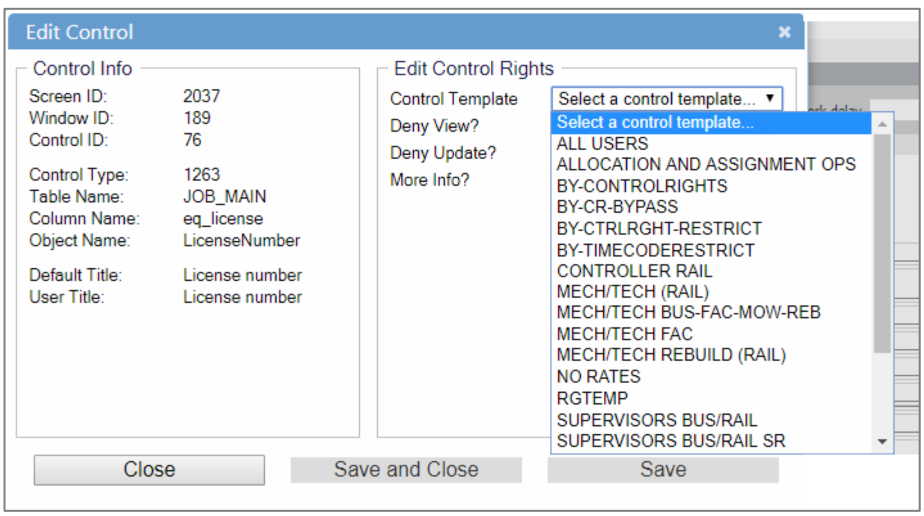
3. To select a field or tab to edit rights to, press and hold **Shift**, and then click the field.



The Edit Control dialogue displays with control information on the left side of the dialogue, and options for editing control rights on the right.



4. From the **Control Template** drop-down field, select a control template. This is the user group template (applied through the User Groups screen) that controls user access rights to screens, their tabs, data, and reports. For more information on user groups, refer to the help for the User Group screen.



5. Select **Deny View?**, **Deny Update?**, or **More Info?**.

    - **Deny View?:** Check this box to turn off access to the field. This hides the field on the screen.
    - **Deny Update?:** Check this box to turn off access to update the field. The user can see the field, but not edit.
    - **More Info?:** Check this box to make this field a more-info type field. More info fields are hidden, or minimized on the web screen until a user clicks the button to expand those fields. This field applies to fields that display in the web screen only.

6. When you are done making changes, click one of the options at the bottom of the pop-in.
    - **Close:** Closes the pop-in without saving changes.
    - **Save and Close:** Saves the settings and closes the pop-in. This button is greyed out until a setting is changed.
    - **Save:** Saves the settings, but keeps the pop-in open (this also can be used while you are in progress to save the current changes without exiting). This button is greyed out until a setting is changed.

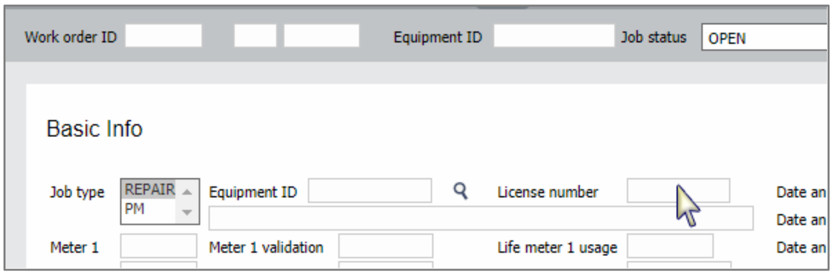
Using Edit Control Info

The option for editing control info allows you to change default text of a label, set a control as required or highlighted on the screen, and other options that change the way users interact with that control.

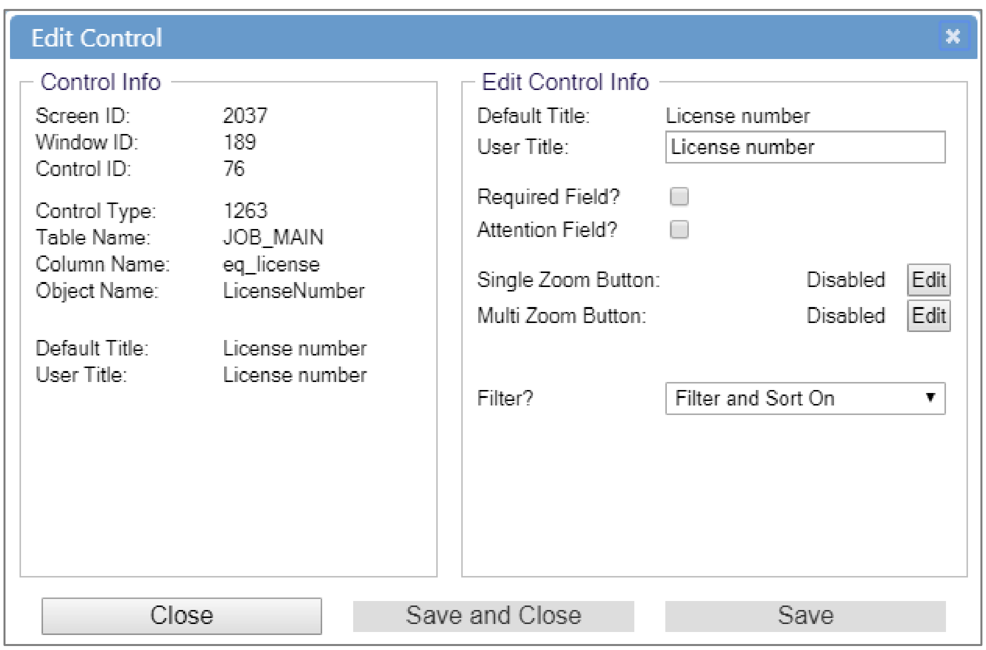
To edit control info:

1. Start the **Edit Control Info** mode as explained in the Starting Admin Mode section.

2. To select a field or tab to edit info for, press and hold **Shift**, and then click the field.



The Edit Control dialogue displays with control information on the left side of the dialogue, and your options for editing control info on the right.

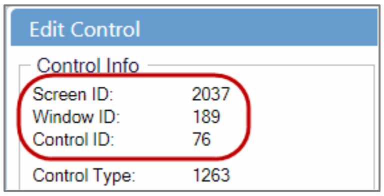


3. Edit the necessary information fields. These fields can vary from control to control as to which options are available to edit:

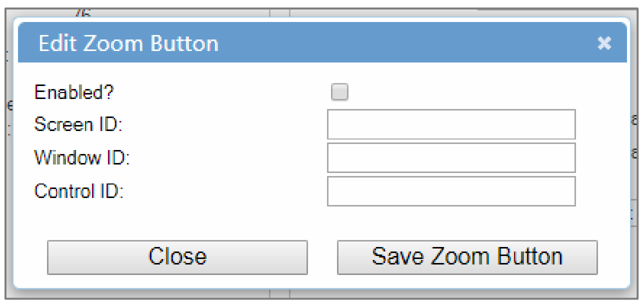
   - **User Title:** Enter a title for the field to override the default title. For label controls, this changes the text shown to the user.

   - **Required Field?:** Check this box to make this a required field.

- **Attention Field?:** Check this box to make this a field that is highlighted.
- **Zoom Buttons:** Zoom buttons display as magnifying glasses and open a specific screen in the Enterprise Portal. These buttons use the screen, window, and control IDs found for specific areas when you are in admin mode. These buttons either show status of Enabled or Disabled on the Edit Control pop-in. You can only have one zoom button set at a time for a field, either single zoom or multi-zoom.



  - **Single Zoom Button:** Add a zoom button to the field. Click **Edit** to add or edit a zoom button. When you are done entering the following information, click **Save Zoom Button**, or click **Close** at any time to cancel out of this pop-in.



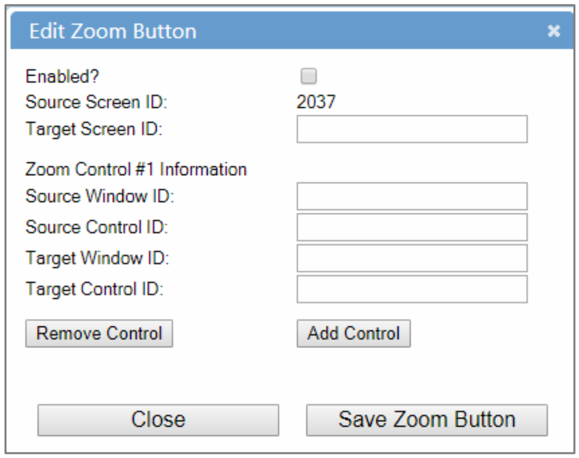
Enabled?: Check this box to enable the zoom button.

Screen ID: Enter the ID of the screen to open with the zoom button.

Window ID: Enter the window ID.

Control ID: Enter the control ID.

- **Multi Zoom Button:** Add a zoom button to the field. When you are done entering the following information, click **Save Zoom Button**, or click **Close** at any time to cancel out of this pop-in.



  Add Control: Add a zoom control.

  Remove Control: Remove the last zoom control on the list.

  Enabled?: Check this box to enable the zoom button.

  Screen ID: Enter the ID of the screen to open with the zoom button.

  Window ID: Enter the window ID.

  Control ID: Enter the control ID.

  Source Window ID: The window ID of the item you want to fill in the target screen.

  Source Control ID: The control ID of the item you want to fill in the target screen.

  Target Window ID: The window ID of the field you want to fill with the source information.

  Target Control ID: The control ID of the item you want to fill in with the source information.

- **Filter?:** This section enables you to set whether this field displays for the filter and sort buttons of the Enterprise Portal. Options allow you to turn on this field for both filter and sort, or only one or the other.
- **Custom List:** This drop-down contains the custom lists defined in your environment. Selecting a list from the drop-down allows users to access that list as their choice-list from the field.

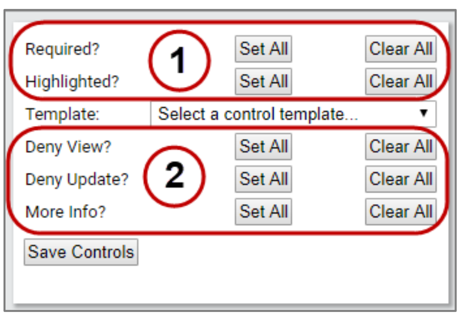
- **Entry must exist in defined list?:** If this box is checked, the user must choose an option from that list when filling in this field (if they enter any other value, a validation error will display). If this is unchecked, users can either select from the defined list or enter any value.

4. When you are done making changes, click one of the options at the bottom of the pop-in.

   - **Close:** Closes the pop-in without saving changes.
   - **Save and Close:** Saves the settings and closes the pop-in. This button is greyed out until a setting is changed.
   - **Save:** Saves the settings, but keeps the pop-in open (this also can be used while you are in progress to save the current changes without exiting). This button is greyed out until a setting is changed.

Using Multi-Control Edit Mode

Use the multi-control edit mode to edit multiple control right or control info items at the same time. With the following editing controls, you can edit both global rights, and rights that are controlled through user groups. In the editing area, these items are separated by the Template drop-down menu.



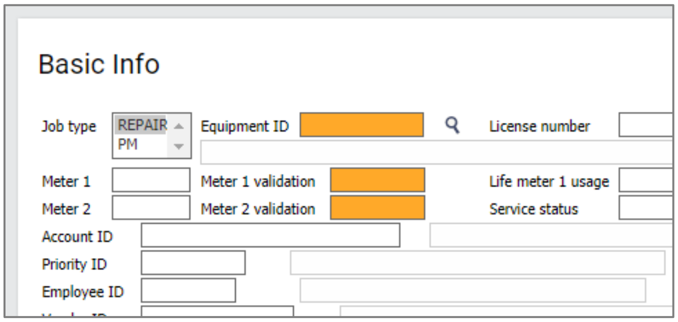
1. Items above the **Template** drop-down affect global rights. Users with rights to the screen affected by these changes, will see the options as they are set up regardless of which user groups they belong to.

2. Items below the **Template** drop-down are affected by the user group template, and changes will differ for users depending on which user groups they belong to. Select a template in this field to choose what those users are able to view, update, and see more info for.

To use multi-control edit mode:

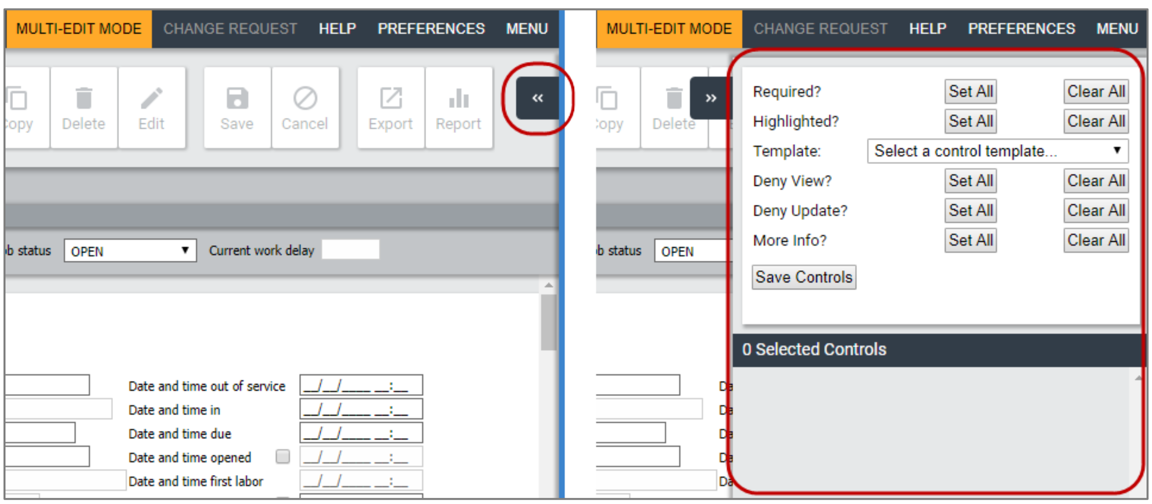
1. Start the **Multi-Control Edit Mode** as explained in the Starting Admin Mode section.

2. Press and hold **Shift,** and click fields to select them.

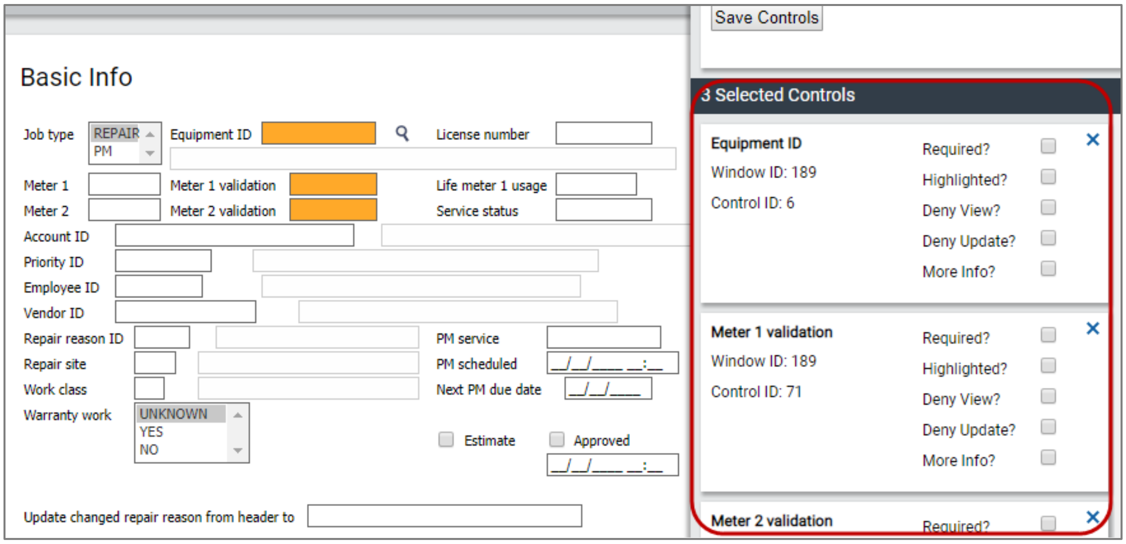


Fields display with yellow highlighting when selected.

3. Click the slider to open the edit menu.



Selected controls display in the bottom section of the edit menu.

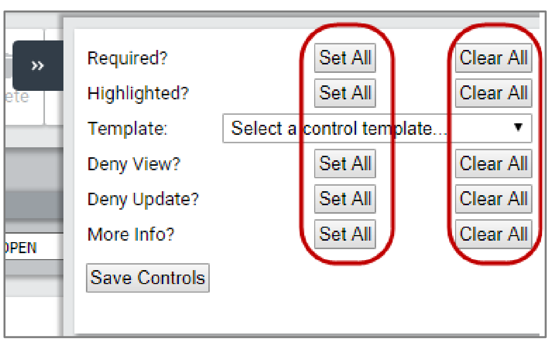


4. To remove a selection, press and hold **Shift** and click the highlighted field, or click the **X** in the top-right corner of the selected control in the slider menu.

5. Edit the items as needed. Edit multiple items with the same edits, or specific controls for individual items.

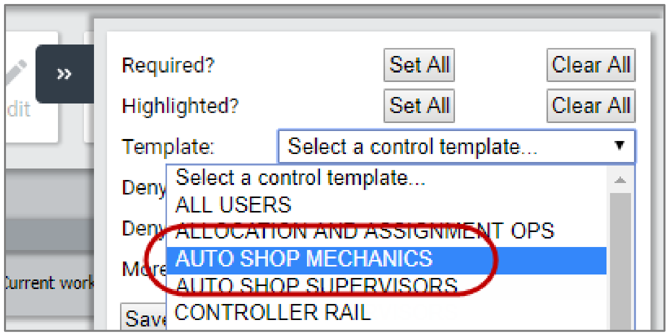
To edit all selected items:

- Click **Set All** or **Clear All** to set all selected controls with the same option. For example, click **Set All** for the **Required?** option to set all of the selected items to be required.



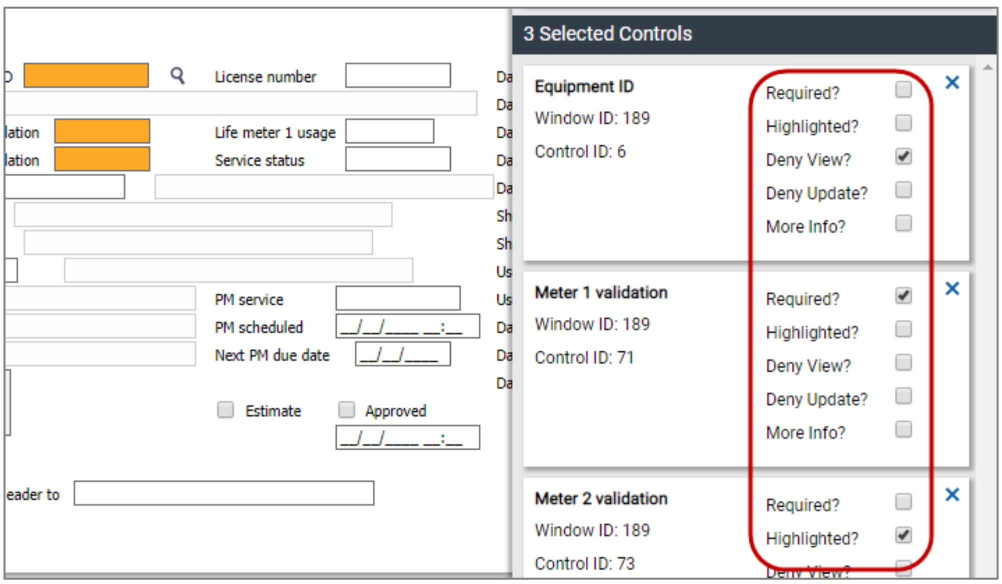
Note: For the user-group affected options (under the **Template** field), you must select a control template before editing controls for the selected user group.

- For example: Select the template for AUTO SHOP MECHANICS. Any changes made to the options below the template drop-down menu will affect only the users in the AUTO SHOP MECHANICS user group.

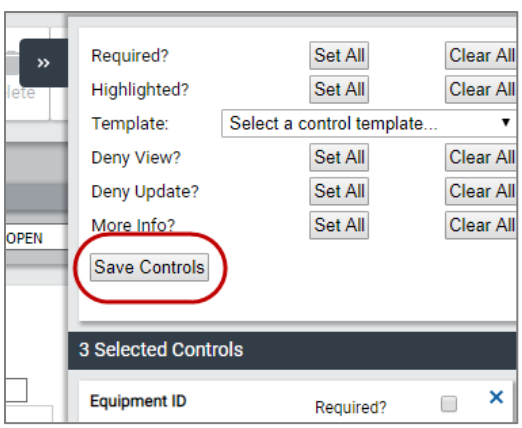


To edit individual items:

- Check or uncheck the options in the individual controls to set each control individually.



6. When you are finished making changes, click **Save Controls**.



The controls are saved and the page refreshes. Your selections will remain selected in case there are other changes to make.

Using Preview Mode

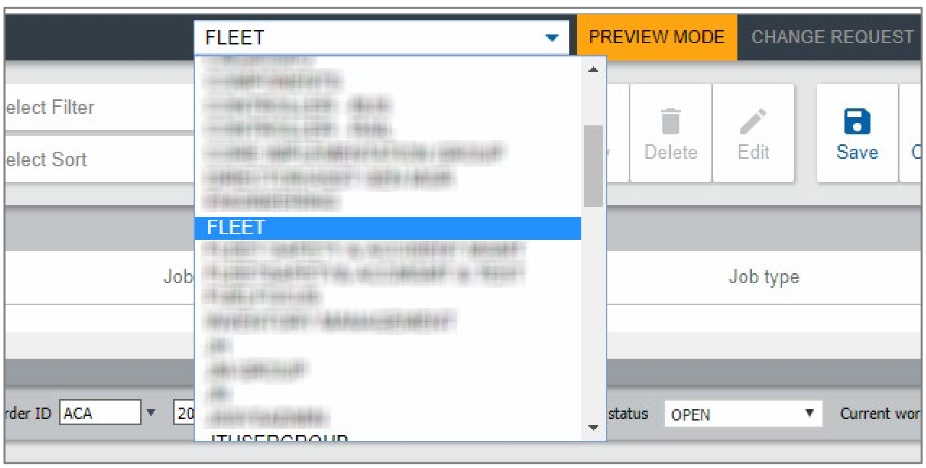
Use the preview mode to view a page with the rights of a specific user group. This allows you to ensure you have the correct settings and available fields, tabs, pages, etc. for the groups that need them.

Note: If your administrative user has other templates applied to the user that limits fields of view, those field will display or not display as set up in the template, even in preview mode. For the best experience, it is best to use preview mode when no other control rights have been specified limiting or changing views.

Note: You must click **New** to create a new record, or click **Edit** to edit the record on the current screen to have access to the preview mode.

To view the preview mode:

1. Start the **Preview Mode** as explained in the Starting Admin Mode section.
2. From the **Select a user group** choice-list, select the user group for this screen.



The screen displays as the selected user group will see when they use the page.

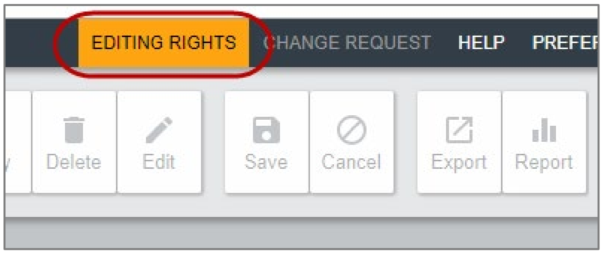
3. Change the user group as needed to see any group's screen views.

Exiting Admin Mode

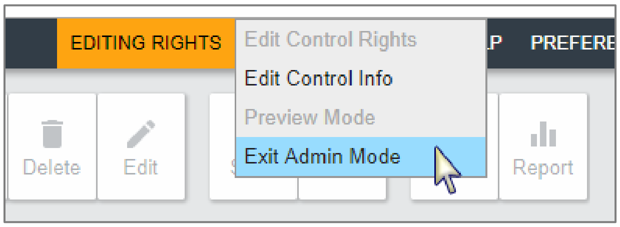
Closes the administration mode and returns the user back to the normal Enterprise Portal mode.

To exit Admin Mode:

1. In the top-right corner of the Enterprise Portal, click **EDITING RIGHTS**.



2. Then click **EXIT ADMIN MODE**.



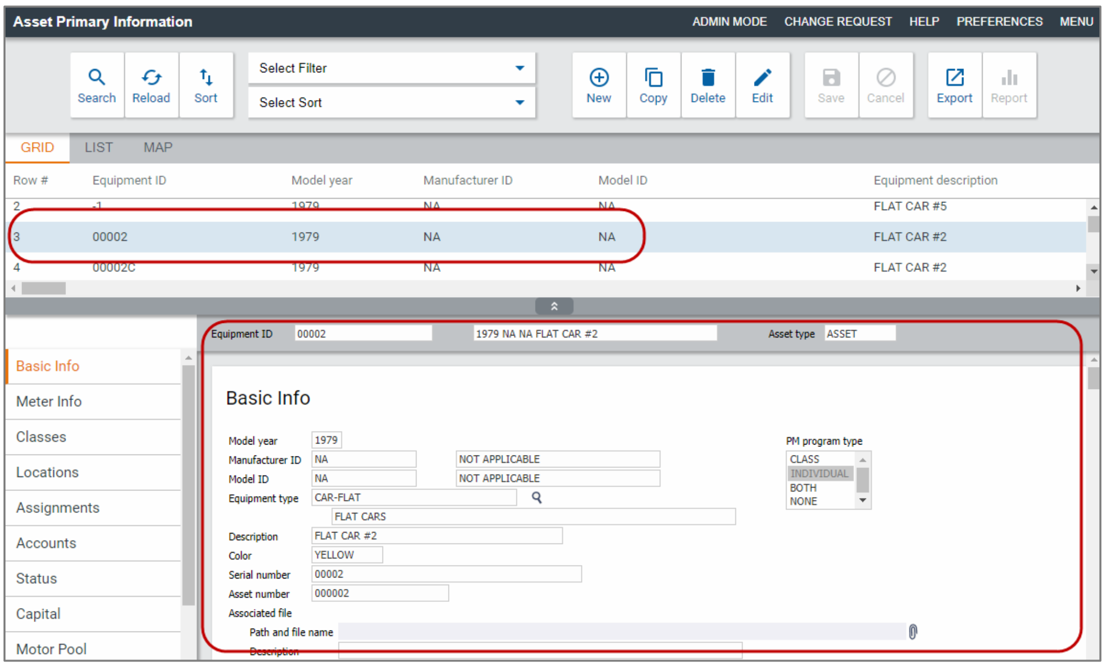
The Enterprise Portal returns to the mode for regular use.

The Main Screen

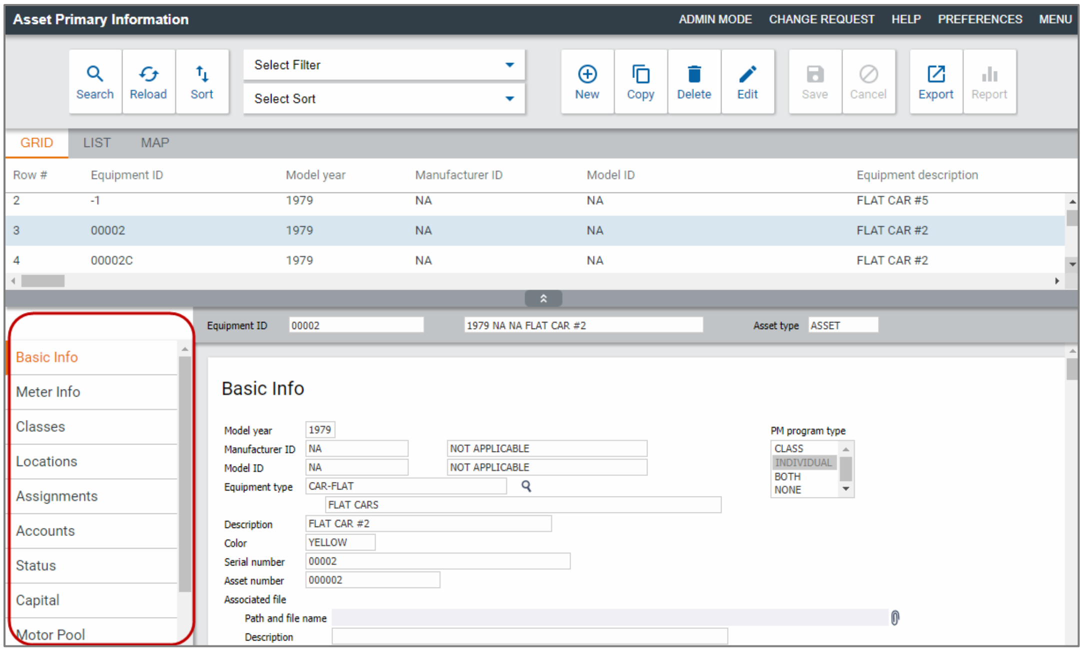
The Enterprise Portal main screen serves three purposes:

- Display full detail about a record of data;
- Provide a form for entry of new records of data;
- Provide a way to update existing records of data

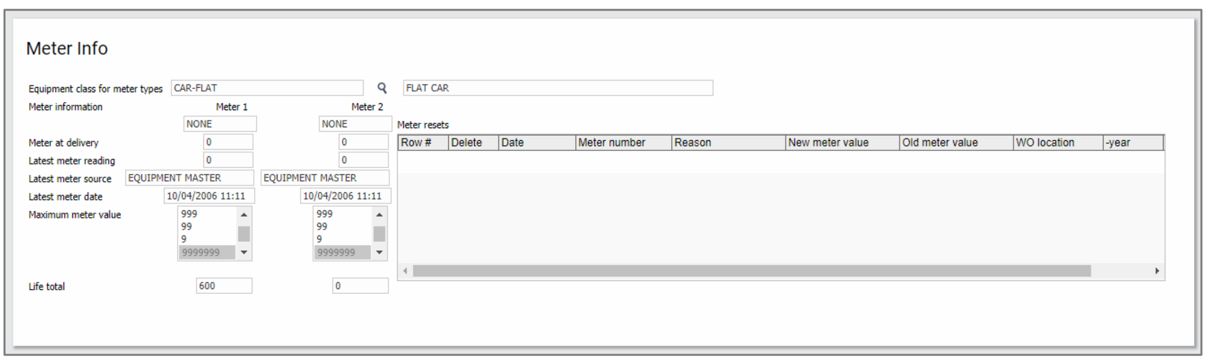
When an existing record from the database is selected in the grid, all detail related to that record is displayed in the main screen:



Once data is displayed in the main screen, you may either scroll through all data using the vertical scrollbar to the right, or you may jump directly to a screen area using the tabs on the left of the screen:



An added benefit to the Enterprise Portal screens is their ability to expand subgroups to the full width of your screen, allowing many columns to be seen at one time.



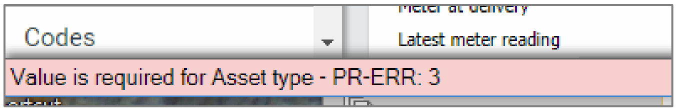
The remaining sections outline viewing messages and uploading files, reports, and URLs to system records.

Messages and Error Handling

In the event of a message or an error while saving a screen (e.g., a validation error), the feedback messages are displayed in the status bar at the bottom of the page.

⚠ Also, when possible (if an offending control ID is sent from the app), the specific field is highlighted and its text contents will be automatically selected so that the user can easily correct the issue.

- The textbox background changes color and displays an important icon ⚠. Hovering over the textbox shows the error detail message as a tooltip.
- As soon as the text value is changed, the color and the tooltip will revert to normal.

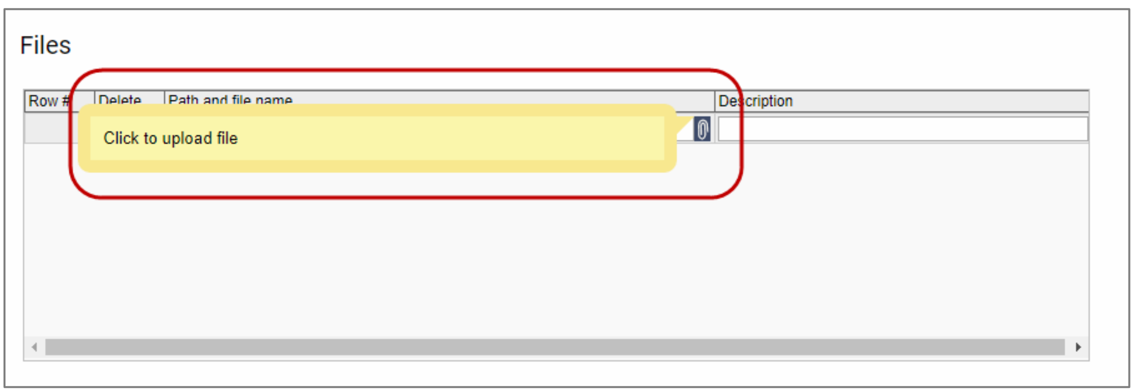


Linking and Uploading Files

In Enterprise Portal, you can add a link to a file or report for a particular work order, asset, etc., by following the steps in the example below. The paperclip is found through several screens, and not only on the Work Order Center screen as shown below.

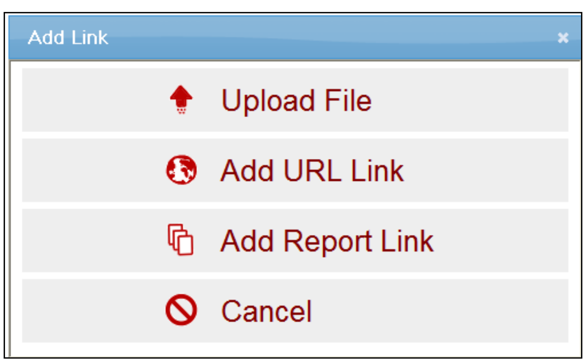
To ready the record to add a file:

1. Click the **Edit** button to edit the record.
2. Go to the **Files** area for a work order. When you hover over the paper clip icon, a yellow message displays to indicate that uploading files can be done by clicking the icon while in edit mode.



3. Click the paper clip icon.

The Add Link dialog displays. You may choose to upload a file, add a URL link, add a report link, or cancel.



The subsequent dialog that displays will be one of the following (for more information, see the appropriate section directly below this list):

- **Upload File:** Enables you to upload a file with an optional title and description.
- **Add URL Link:** Enables you to link to a network resource (e.g., a web site or a shared network file on your company's intranet).
- **Add Report Link:** Enables you to point to a Web Modules report (currently only Crystal Reports are supported).

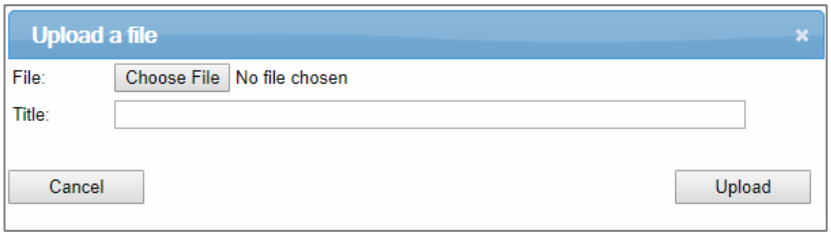
  Note: For report links, farpt:/// is automatically added to the file name when you save.

- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.

Upload File

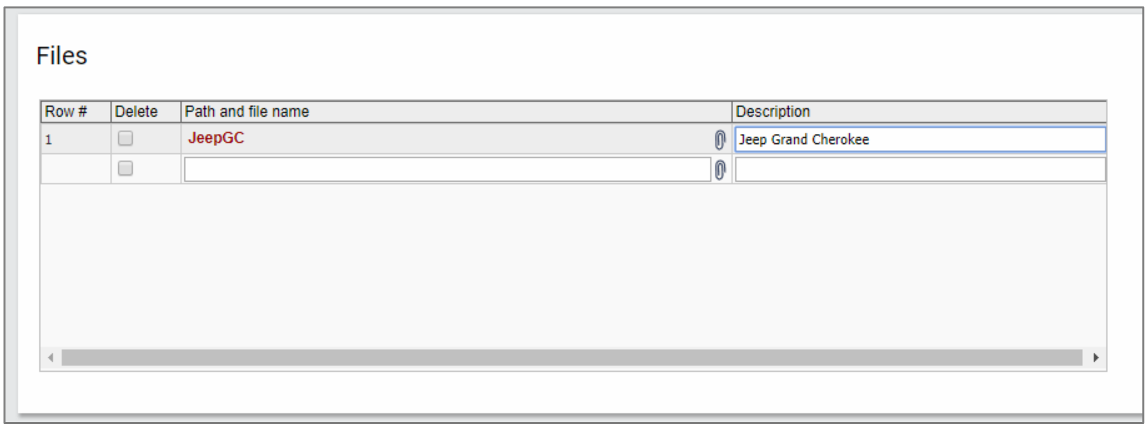
To upload a file:

1. Enter the **File** and **Title,** and click **Upload** to upload the file.



The file is copied to the Uploads directory of the Web Modules' installation where it is renamed to an obfuscated format

The file displays and you may enter a description.



2. Click the **Save** button to process the update.

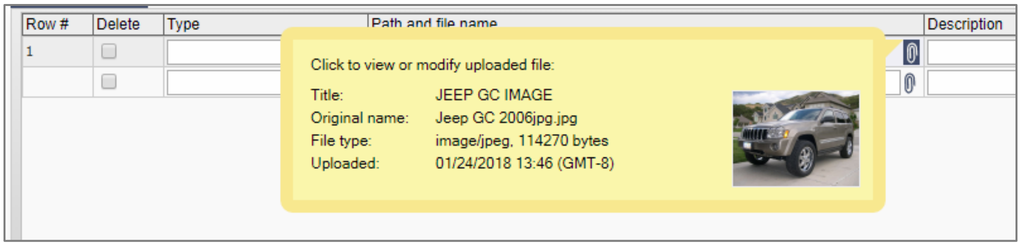
   A successful update message displays at the bottom of the screen.

3. Once a file has been uploaded, click the link or the paper clip icon to view the file.

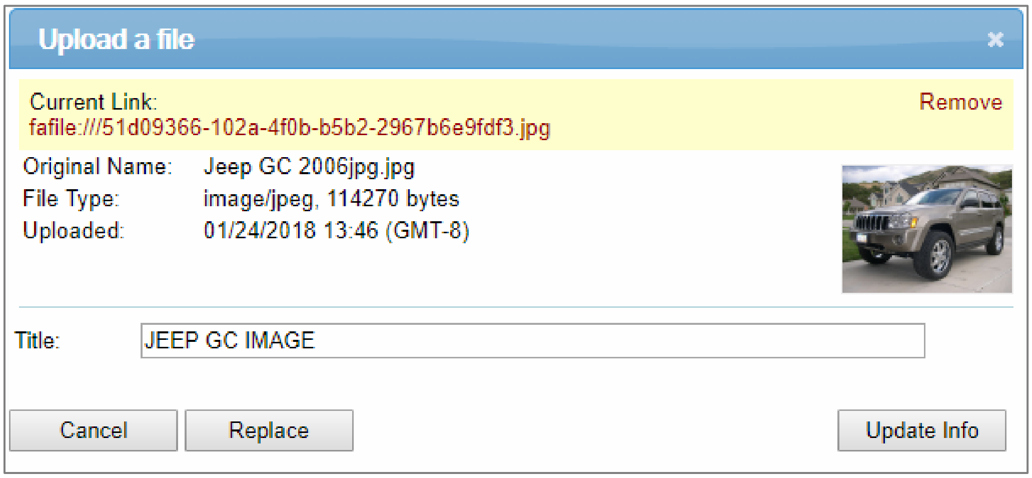
In **Edit** mode, hover over the paperclip icon to see information about the uploaded file. You are also directed to click the paperclip icon to view or modify the uploaded file.

To view or modify the uploaded file:

1. To view the file information, hover over the paperclip icon.



2. To update the file, click the paperclip icon.



The Upload a file Edit dialog displays where you may remove the link, edit the information and replace, or update the information.

Linking Local Files

In previous versions of the software (and with older browsers), you could enter local files and directories as the paths when linking files to equipment, work orders, etc. For example, linking to a file mapped on the local network drive (E:\Files\Test.pdf). When clicking the link in the Application Modules or the Web Modules, the files opens in the appropriate program.

⚠ Important: Recently, modern browser security defaults to block requests to open files and folders on a separate host. Even if the files are present in a network folder, and the web server is hosted on the same network, using the **file://** protocol cannot be used successfully anymore. Although certain security settings will sometimes allow you to still link local files, because this issue is due to modern browser security and it not a limitation of this software, it is the responsibility of your IT department to dictate if this is an acceptable method for file handling, and to configure the browsers and Internet Information Services (IIS) application security to allow these requests.

Hosting and Serving Files on a Web Server

If needed, use the following procedure to preserve the file names and hierarchical structure information.

Warning: If the deployment tool is used to delete the web instance, the files and folders created using this method will be deleted as well.

To use files on the web server:

1. On the web server, navigate to the installation's base web folder. This is the root of the hosted site.

   For example: …\\<*deployment name*>*WebModules**Web*

2. Create a folder to hold the linked files. If needed, create sub-directories inside this folder (for separating asset files from other files, organizing by year, etc.).

   For example, create a folder in the Web folder called Files.

3. Move the files that need to be linked to this directory or sub-directories as needed.

4. When adding these files to records, click **Add URL Link**. For more information on this procedure, refer to the Add URL Link section.

5. Enter the URL of the web server.

   For example:
   If the URL to your web instance is

   http://<ServerName>/<Instance>/FASuitInfoCenter.aspx

   Then enter the following:

   http://<ServerName>/<Instance>/

   After the slash (/), specify the folders and file name of the linked file. For instance, using the server above, the full path becomes http://<ServerName>/<Instance>/Files/<file-name>.

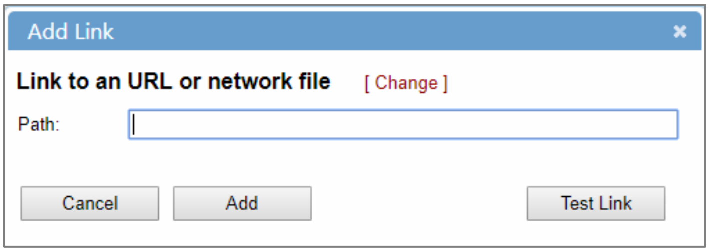
6. Click **Add** and then save the record.

   Note: Files added can always be accessed in the specified folder, and can be organized with sub-directories, you just need to update the link if you reorganize.

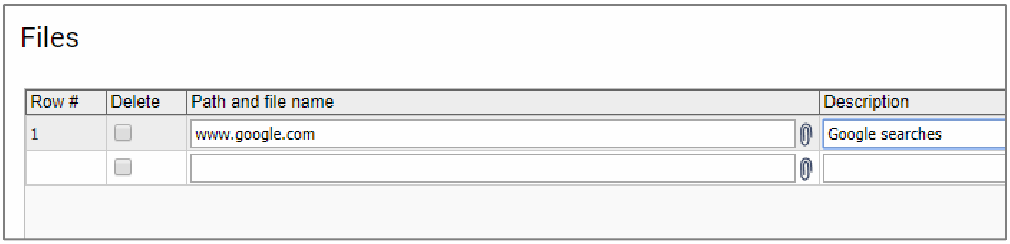
   Note: An alternate method of hosting files is to create a virtual folder hosted by IIS and link in the same way to the hosted file, though, this is not a supported standard.

Add URL Link

1. Enter **Path** and click **Test Link** to test the link. Then click **Add** to add the link.



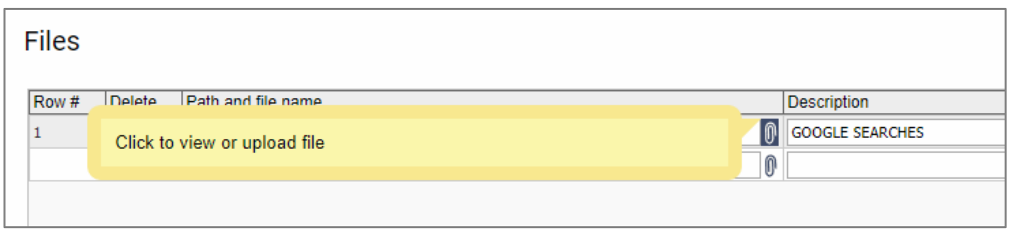
The URL link displays and you may enter a description.



2. Click **Save** to process the update.

The URL link and a Successful Update message display.

When you hover over the paperclip icon, you are directed to click the icon to view the URL in a new window.

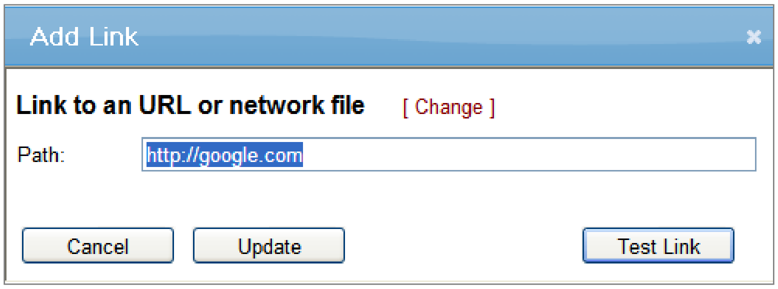


3. Click the icon or the link and the URL opens in a new window.

*Once a URL link has been uploaded, you can edit the file in the **Edit** mode.*

4. In **Edit** mode, hover over the paperclip icon to view information for that item. Click the icon to view or modify the link.

The Add Link Edit dialog displays where you may change the link, edit, or update the information.



Add Report Link

The **Add Report Link** button enables you to point to a web modules report (currently only Crystal Reports are supported).

Note: For report links, farpt:/// is automatically added to the file name when you save.

1. From your web browser, copy the part of the report's URL that identifies the report. This link contains the folder name (seen below as Shop Activity) and the name of the report (Work Order Detail.rpt).

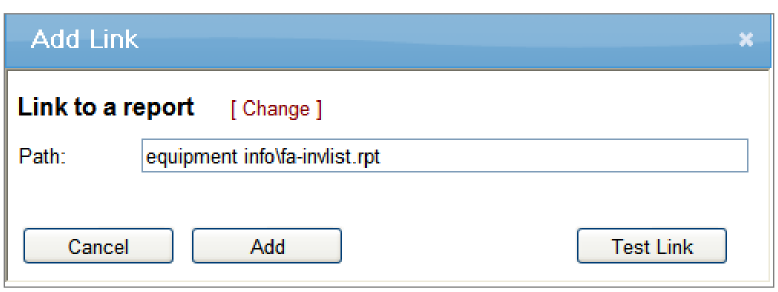
   For example:

   - http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt

     becomes

   - Shop Activity/Work Order Detail.rpt

2. Paste the report identifier string (path) and description in the **Path** field.
3. Click **Test Link** to test the link.
4. Click **Add** to add the report link.

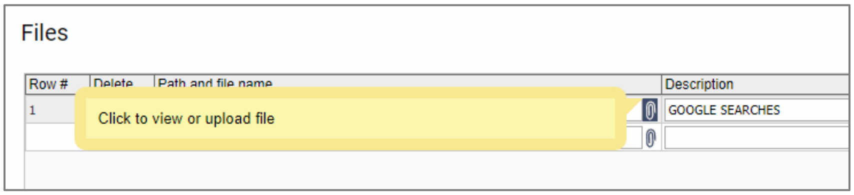


   The Report link displays and you may enter a description.

5. Click **Save** to process the update.

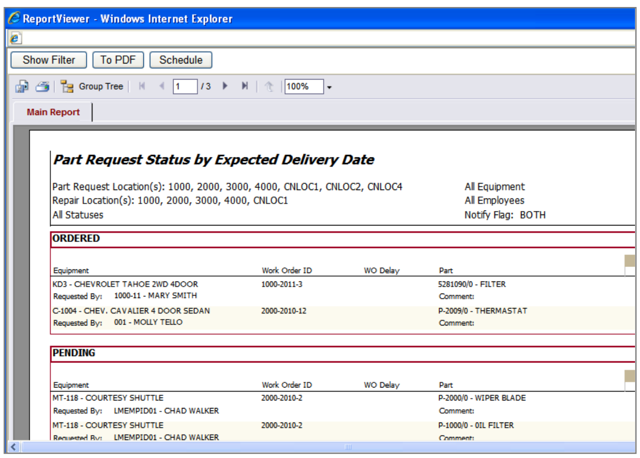
A Successful update message displays along with the report link.

6. When you hover over the paperclip icon, you are directed to click the icon to view the report in a new window.



7. Click the paperclip icon.

The report displays in Report Viewer.

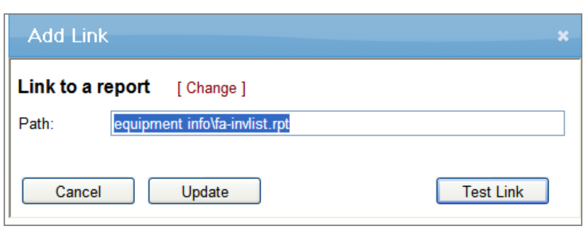


Once a report link has been uploaded, you can edit the file in the ***Edit*** *mode.*

To edit a report link:

1. In **Edit** mode, click the icon or the link to view or modify the link.

   The Add a Link Edit dialog displays where you may change the link or update the information.



2. Click **Update** when you or finished, **Test Link** to test the link, or **Cancel** to leave the link as it is.

Appendix A. Creating/Editing Screen Menu XML Files

The following is a quick overview of Enterprise Portal Screen Menu XML menu files, so you can try creating them yourself:

The XML file is just a text file having an extension of .xml - so you can use any text editor to create/edit these.

Enter the first two lines of the text file EXACTLY as follows:

```
<?xml version="1.0" encoding="utf-8" ?>

<FAMenu>
```

The last line of the text file MUST be entered as:

```
</FAMenu>
```

The remaining lines in the text file do one of the following:

- Create a menu or sub-menu
- Create a screen link

A.1 Creating a Screen Link

To create a screen link, the format of the text line is:

```
<MenuItem name="Screen Name" screenId="Screen ID"/>
```

Example 1:

```
<MenuItem name="Fleet Equipment" screenId="2024"/>
```

The screen name is up to you. You can name the screen what it's called in the GUI or Enterprise Portal, or anything else. This is useful in case a customer is using a standard screen in a non-standard way, or for when you want to take a long complicated screen name (for example, **Meter Readings -> Assignments -> Usage**) and present it in a simpler way (Meter Readings and Usage)

Example 2

If you wanted to (as a simple example), you could create a whole menu.xml file with just screens, no menus or submenus. So for example, the following xml file:

```
<?xml version="1.0" encoding="utf-8" ?>
<FAMenu>
```

```
<MenuItem name="Work Order Center" screenId="2037"/>
<MenuItem name="Work Order - Short Form" screenId="2155"/>
<MenuItem name="Time Cards" screenId="2058"/>
<MenuItem name="Parts Issues" screenId="2160"/>
<MenuItem name="Fleet Equipment" screenId="2024"/>
<MenuItem name="Subsystems and Parts" screenId="2025"/>
</FAMenu>
```

Would look like this in the Enterprise Portal:

A.2 Creating a Menu/Submenu

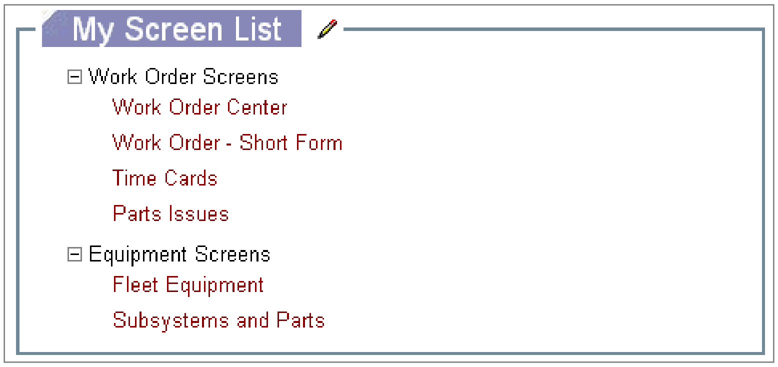
Menus and submenus are created by wrapping screen lines (rows in the text file) in the following format:

```
<Menu name="Menu Name">
...any number of screen lines or sub-menus...
</Menu>
```

So, the following xml file:

```
<?xml version="1.0" encoding="utf-8" ?>
<FAMenu>
<Menu name="Work Order Screens">
<MenuItem name="Work Order Center" screenId="2037"/>
<MenuItem name="Work Order - Short Form" screenId="2155"/>
<MenuItem name="Time Cards" screenId="2058"/>
<MenuItem name="Parts Issues" screenId="2160"/>
</Menu>
</Menu name="Equipment Screens">
<MenuItem name="Fleet Equipment" screenId="2024"/>
<MenuItem name="Subsystems and Parts" screenId="2025"/>
</Menu>
</FAMenu>
```

Looks like this in Enterprise Portal:

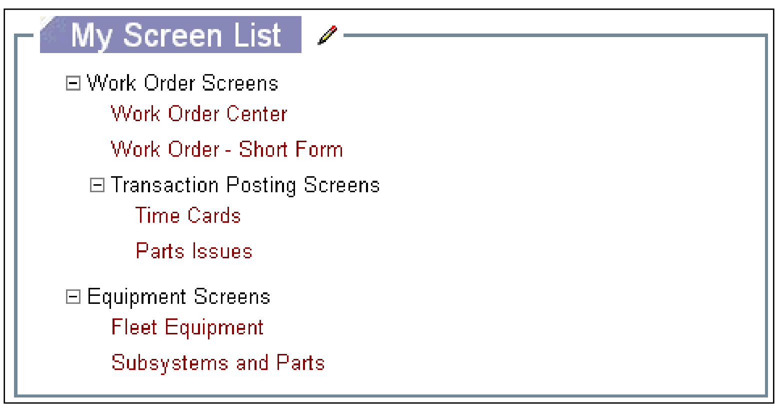


You can nest menus within menus to create sub-menus.

So the following xml:

```
<?xml version="1.0" encoding="utf-8" ?>
<FAMenu>
<Menu name="Work Order Screens">
<MenuItem name="Work Order Center" screenId="2037"/>
<MenuItem name="Work Order - Short Form" screenId="2155"/>
<Menu name="Transaction Posting Screens">
<MenuItem name="Time Cards" screenId="2058"/>
<MenuItem name="Parts Issues" screenId="2160"/>
</Menu>
</Menu>
<Menu name="Equipment Screens">
<MenuItem name="Fleet Equipment" screenId="2024"/>
<MenuItem name="Subsystems and Parts" screenId="2025"/>
</Menu>
</FAMenu>
```

Looks like this in Enterprise Portal:



The tricky part in creating these menus and sub-menus (and sub-sub-menus, etc.) in screen menu XML files is keeping straight which <Menu ...> line (starting a menu) corresponds with what </Menu> line (ending a menu). So typically (although it's optional), it is better to indent these menus and submenus with tabs, just so that the starting line (<Menu ...>) vertically lines up with its corresponding ending line (</Menu>). Again, it's not required, it just makes it cleaner, easier to understand, and less prone to error.

Using indentation, the xml example from above in #8 would look like the following:

```
<?xml version="1.0" encoding="utf-8" ?>
<FAMenu>
<Menu name="Work Order Screens">
	<MenuItem name="Work Order Center" screenId="2037"/>
```

```
            <MenuItem name="Work Order - Short Form" screenId="2155"/>
            <Menu name="Transaction Posting Screens">
            <MenuItem name="Time Cards" screenId="2058"/>
            <MenuItem name="Parts Issues" screenId="2160"/>
            </Menu>
    </Menu>
    <Menu name="Equipment Screens">
            <MenuItem name="Fleet Equipment" screenId="2024"/>
            <MenuItem name="Subsystems and Parts" screenId="2025"/>
    </Menu>
    </FAMenu>
```

Those are the basics. The rest is up to your imagination and your organization’s needs. With this primer, you should be able to understand what's going on in the sample menu files (FAMenuFull.xml, FAMenu.xml, and MechanicMenu.xml) and make whatever changes you need.

Appendix B. The Enterprise Portal View Screen Report Feature

The View Screen Report icon allows Enterprise Portal users to quickly launch and print Crystal reports directly from their current Enterprise Portal screen. The report runs automatically and is displayed in Adobe Acrobat (as a .PDF file) where it can easily be printed.

The difference between this functionality and the Execute Screen Report ability in the GUI is that the Enterprise Portal version prints the report based upon the record that is selected in the grid. Whereas, the GUI version prints the report for all of the records that match the criteria entered into the screen’s filter.

B.1 Setup the View Screen Report feature

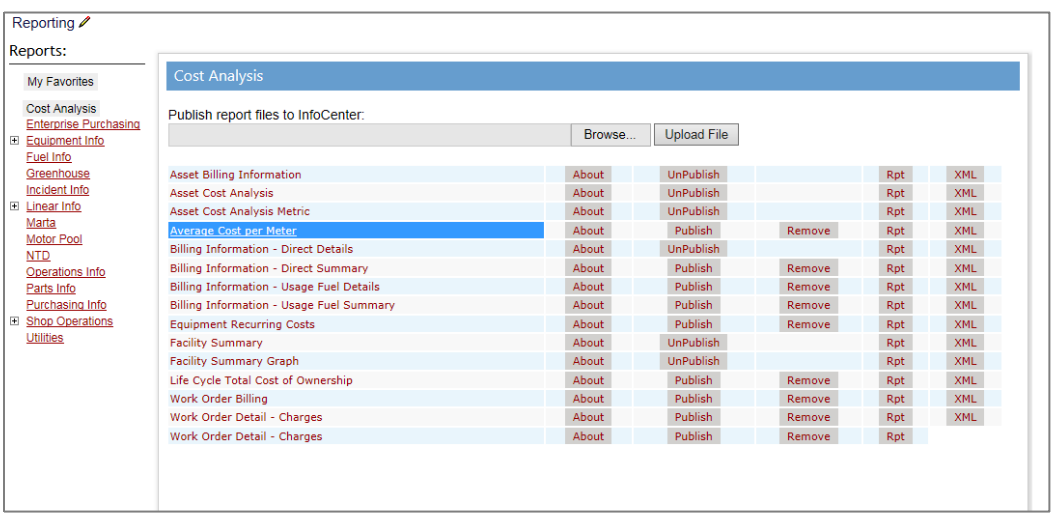
To use the View Screen Report feature, you will need to perform the following setup steps.

1. Publish the desired report in the Reporting Module by completing the following steps.

   When a report is published, it means that the report is now available to be viewed by users with the rights to view the report. Each report that needs to be made available to users must first be published before security rights can be applied for the User Group.

   i. To publish reports, click on a report group to see the list of available reports.

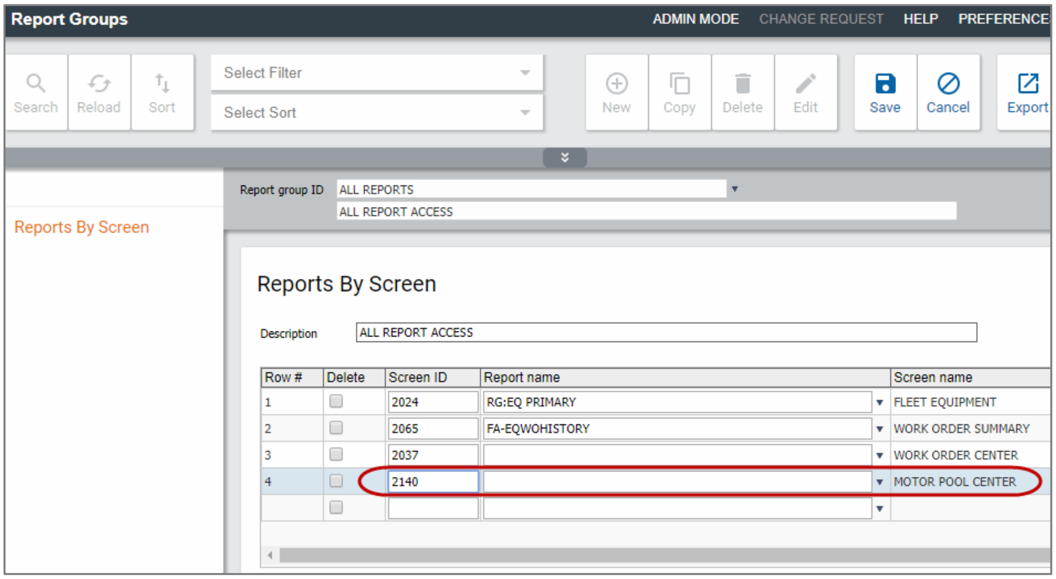
   ii. Next, click on the **Publish** button next to each report you would like to publish. The **Publish** button turns into an **UnPublish** button upon clicking on it. If you later determine a report should no longer be visible to users you can unpublish the report by clicking the **UnPublish** button.



You must publish each report prior to defining security rights.

2. On the Report Groups screen, add the desired report (i.e., the custom Motorpool Trip Ticket) to an existing report group or create a new report group.

    i. Associate the report to the screen that you will be running it from by entering the screen ID (e.g., for MotorPool Center the screen ID is 2140).



    ii. Click **Save** when you are done entering the reports.

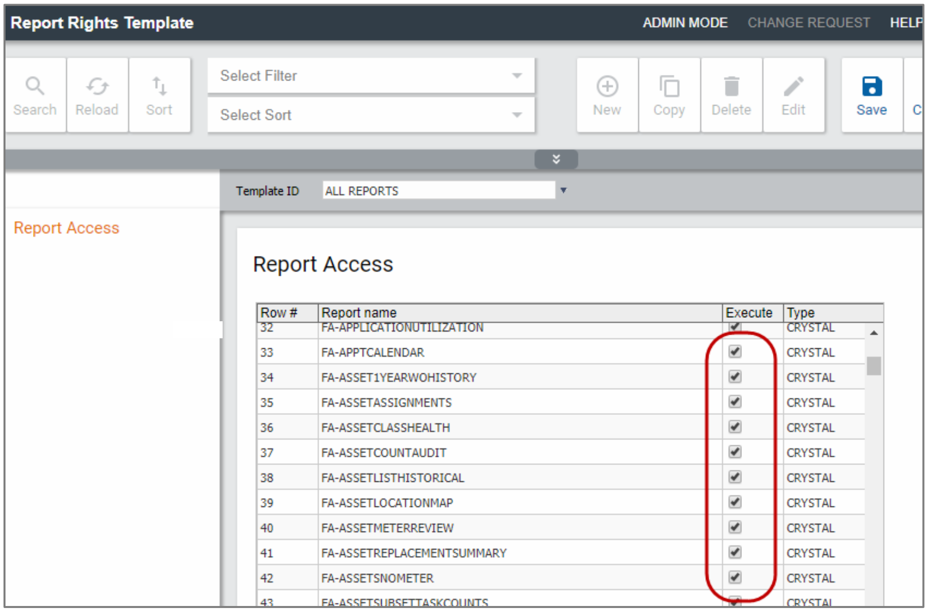
3. For the user group that will be executing this screen report:

    i. Open the Report Rights Template (Report Access) screen.

    ii. Filter on the appropriate template in the Report Access screen.

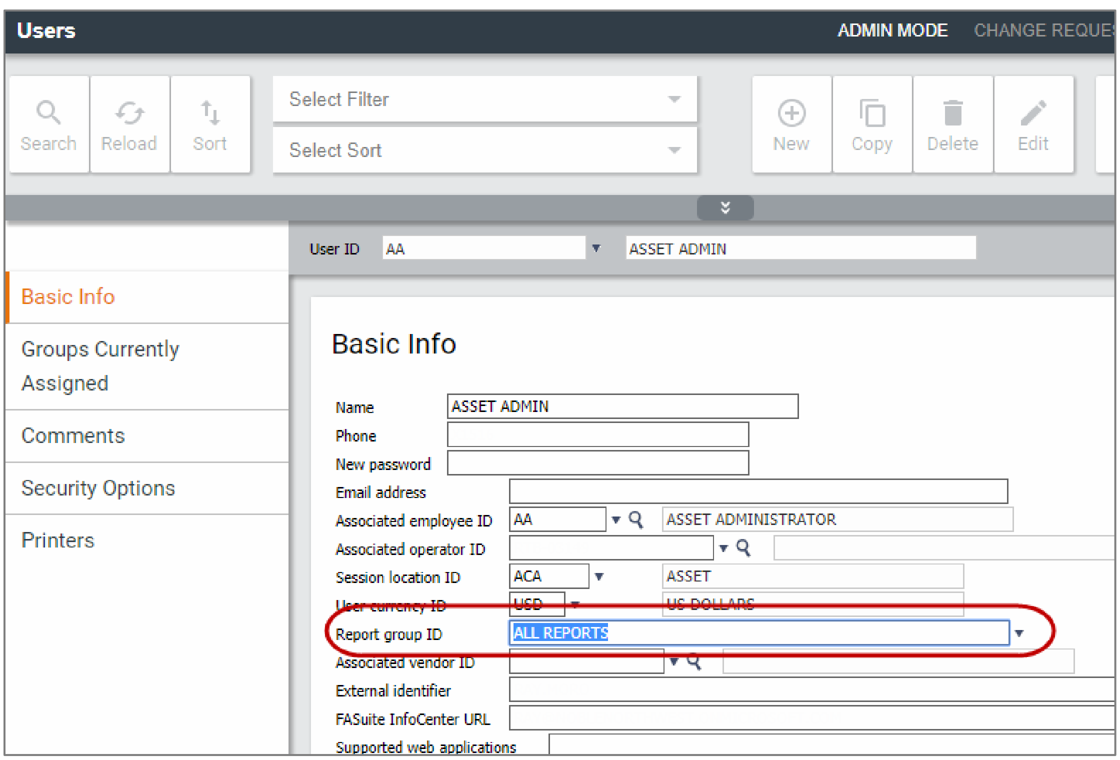
    iii. Click Edit to unlock the record.

iv. Check each box in the Execute column to add execute permissions to each needed report (i.e., the custom Motorpool Trip Ticket report).

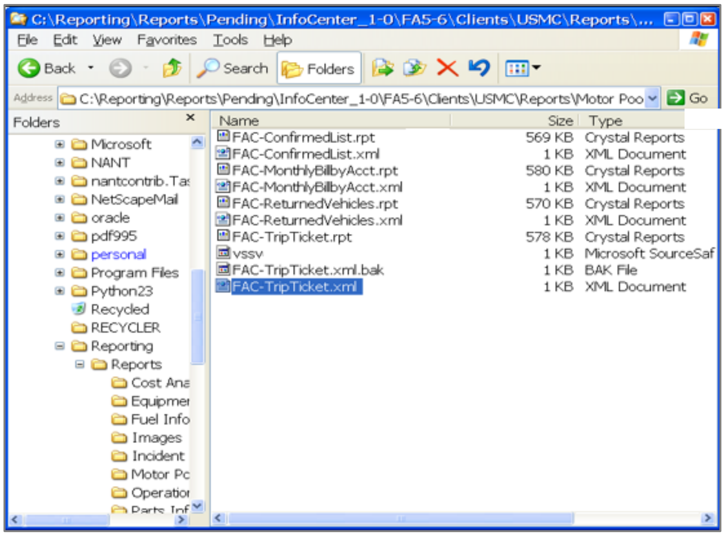


v. Click **Save** when you are done.

4. In order for a user to launch the screen report, you must first verify that they are associated with the proper report group from Step 2.



5. Confirm the existence and format of the xml file for the screen report.



6. Map the report parameters to matching Controls. In the ScreenDetails line below, screen ID 2140 refers to the Motor Pool Center screen, and the Window/Control values of 599/2 refer to the reservation ID field.

   If the XML setup (below) is not complete, when the icon is pressed the user will be required to enter criteria in the report filter in order for the report to run. Depending upon the way the XML file is setup, it can also be configured to run in the Crystal Report module. This option allows for drill-thru capabilities to other reports (which the direct-to-Acrobat option does not), whereas the direct-to-Acrobat option offers more streamlined printing.

   <ReportSettings>

   <FilterItem>
   <Name>ReservationID</Name>
   <ScreenDetails screenId="2140" windowId="599" controlId="2" groupRow="-1" toPDF="true"/>
   </FilterItem>

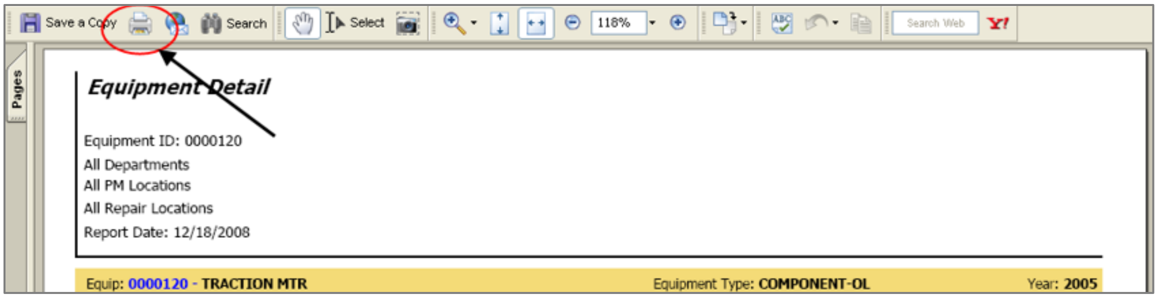
   </ReportSettings>

B.2 Using the View Screen Report Icon to Print

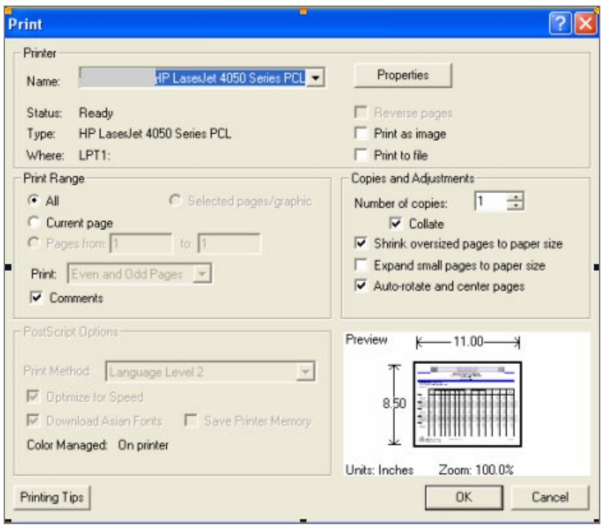
After the setup is complete, perform the following steps to print from the screen that you configured for the View Screen Report icon.

1. Select the desired record in the grid for printing and click the View Screen Report icon.

2. When the report displays in the browser, click the Adobe plug-in Print button.



3. When prompted with the Print dialog box, verify the information and click **OK** to print the report to the default printer.



Appendix C. Web Modules Shortcuts

C.1 Data Entry and Look-Up Shortcut Keys

Get Data = **Alt-G**
Sort Records = **Alt-O**
Filter Records = **Alt-F**
New Record = **Alt-N**
Copy Record = **Alt-Y**
Process Update = **Alt-S**
Cancel Update (Undo) = **Alt-Q**
Edit Record = **Alt-U**
Delete Record = **Alt-D**

C.2 Additional Shortcuts

Jump down to next section = **Alt – J**. If the screen is in update or insert mode, Focus will be set to the first unlocked control in the next section.

Jump up to previous section = **Alt – K**. If the screen is in update or insert mode, Focus will be set to the first unlocked control in the previous section.

For Text Boxes – these keys only work if applicable:

- Open Choice List = **Alt – C**
- Open Date-Time Picker = **Alt – T**
- Open Zoom window = **Alt – X**
- Insert “Now” in to date, date-time of time fields = **Shift – N**
- Jump out of Group Section = **Shift – (right arrow).** This currently moves to the next section.
- Move up a row when in a Group Section = **Shift – (up arrow)**.
- Move down a row when in a Group Section = **Shift – (down arrow)**.
- Copy the cell above into the current cell: = **Ctrl – Shift – “ (quote)**
- Clear the entire row of data = **Alt – B**
- Paste into text area and input fields = **Right-click – Paste** (you must add a space after the pasted text with this paste method), OR **Ctrl – V**.

For Check Boxes:

- Check or Uncheck = **Space Bar** (this is normal browser – check box functionality)