

SouthWare QuickScreens Menu

The SouthWare QuickScreens Menu is a portal that provides an integrated menu environment for users logged into SouthWare. The portal integrates one-click access to SouthWare web portals, full access to the complete SouthWare classic menu, and global find/navigate features. Whether you are a new or a long-time SouthWare user, the QuickScreens menu gives you efficient and easily-navigated access to SouthWare functions.

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Feature Highlights

Highlights of features included in the portal include:

- Launch web portals and standard programs from the same menu and keep them all active
 - Top row of tabs provides access to all open web portals
 - Bottom row of tabs provides access to all open programs
 - Operator security access determines which menu options appear for both portals and standard programs
- One-click menu access to web portals
 - Multiple view modes for web portals
 - Icons view – displays portals as app icons
 - List view – displays portals in a grid
 - Powerful filtering of web portals
 - One or all roles
 - Portal category selection
 - Roles-oriented, people-oriented, entry-oriented, analysis-oriented
 - Multiple sort options
 - Operator-specific defaults
 - Web portals are opened in full-screen tabs to maximize available work space
- Info Pane – Built-in display of updated news, reminders, and tips
 - Configurable display
 - Customizable URL for info source
- Classic Menu – Standard SouthWare menu tree
 - Launch programs from tree
- Global Find/Navigate – You can find and view data without first navigating to a portal
 - Built-in global search of key SouthWare files
 - Search by document or name
 - List of search results provides zoom to related portal
- Status bar to show current TaskWise counts

Setup Requirements

The QuickScreens Menu Portal must be run within a normal SouthWare login session (SouthWare's browser) and is not available to external users. It also requires NetLink Server mode - Processor mode is NOT supported.

When you install this portal you are ready to use it. We recommend you make this portal your Start Page for your browser menu as outlined below.

Product Licensing

- Requires SouthWare SwiftMate license
- Requires use of NetLink Server mode (not Processor mode)

Accessing the QuickScreens Menu

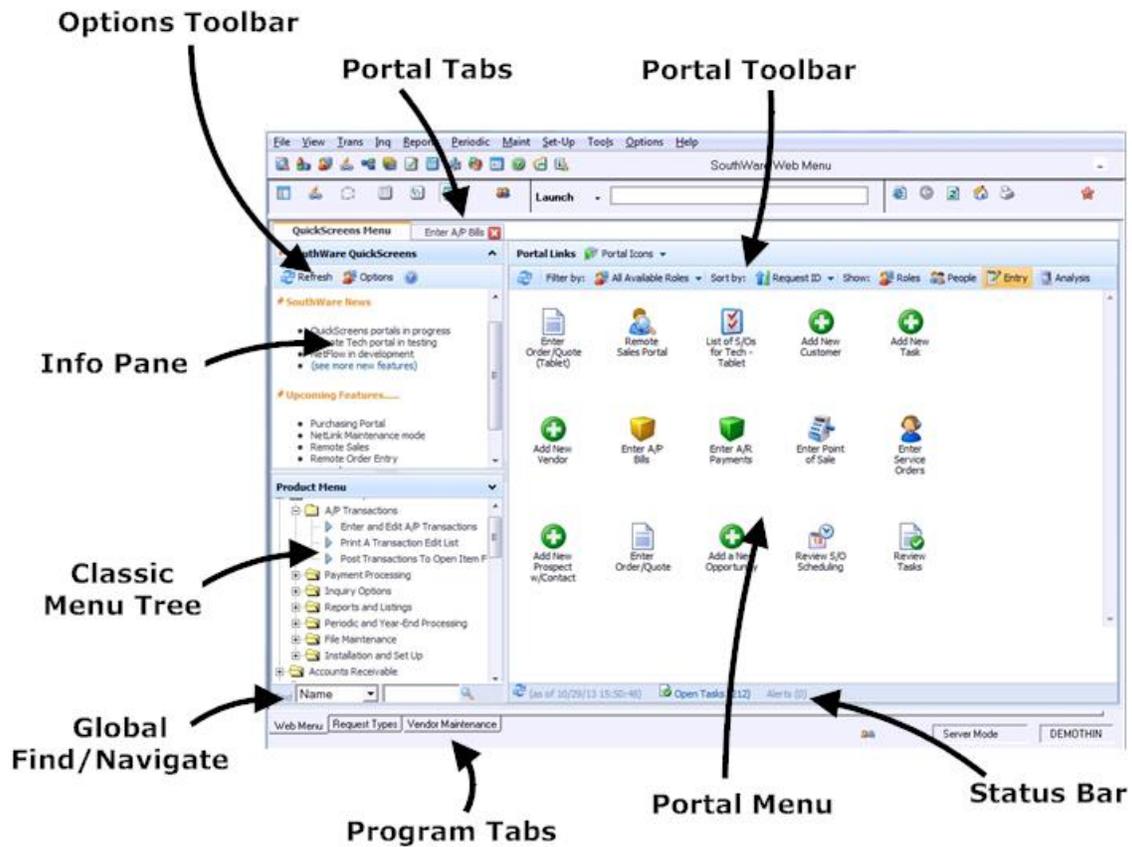
You may access this portal via the P_QSMENU WebView ID .

We recommend that you set this View as the Start Page for your browser menu. To do this:

- Click on the down arrow beside the "Launch" text at the top of the browser
- Select "Set Zoom View as Start Page" from the menu
- Select the "P_QSMENU" view from the list

QuickScreens Menu Workspace

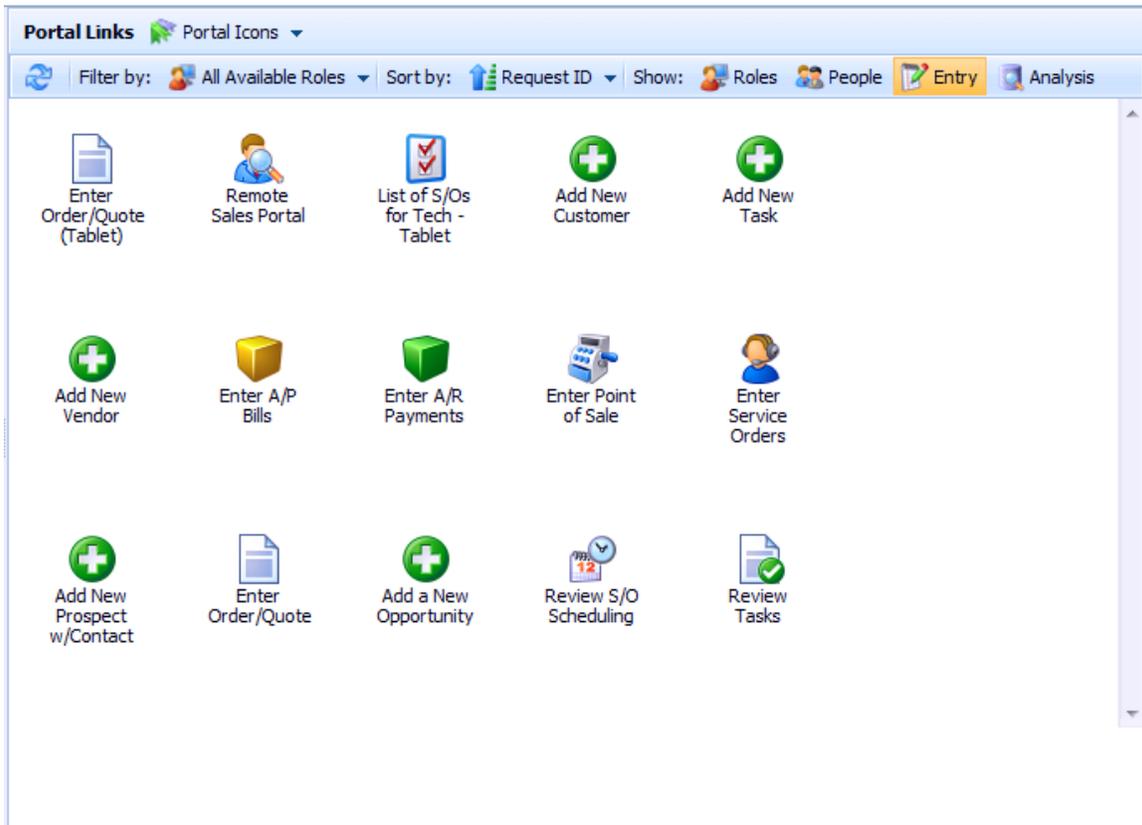
Here is how the QuickScreens menu organizes the workspace for your menu environment:



- **Options Toolbar** – This toolbar provides the following options:
 - **Refresh** – Reload the entire QuickScreens menu portal and reload the related menus
 - **Options** – Display the options window for the Info Pane
 - **Help** – Display this documentation in a browser window
- **Info Pane** – Displays the page specified by the related URL (see “Info Pane” later)
- **Classic Menu Tree** – Displays an expandable/collapsible tree view of the entire classic menu tree
- **Portal Menu** – Shows the icons or list of portal “apps” that can be accessed
- **Portal Toolbar** – Provides filtering and sorting options for the portals to display
- **Portal Tabs** – Shows a tab for each open portal – open tabs may be closed as needed
- **Program Tabs** – Shows a tab for each open program
- **Global Find/Navigate Entry** – Allows entry of a search value for the global find function
- **Status Bar** – Shows current totals for tasks and alerts

Icon Portal Menu

The Icon Menu mode shows each available portal as an image with a related description. Both the image and description are defined in the related NetLink Request record (NL-01-02). The menu shows only the portals allowed by your operator security clearance.



Icon Portal Menu

When you select a portal it is opened as a new tab in the Portal Tabbar.

Icon Portal Toolbar

The Icon Toolbar provides the following options for controlling the icons displayed:

- **Refresh** – Reload the menu
- **Filter by Role** – Select a single role or all roles – if you select a single role the menu will show only portals associated with that role
- **Sort by** – Select a sort sequence for the icons
- **Categories** – You may toggle each category on or off to change the types of portals displayed (Roles, People, Entry, Analysis)

The options you select are automatically saved and are used the next time you display the menu.

List Portal Menu

The List Portal Menu mode shows each available portal in a grid list. The list shows only the portals allowed by your operator security clearance.

	Description	Comment	Request ID	Role	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
➔	Service Order Analysis Hub		WISVCORDHUB	SVMSVO	A
➔	Sales Orders		WIORDERHUB	SLMCFO	A
➔	Project Analysis		WIPROJHUB	SLM	A
➔	Job Analysis		WIJOBHUB	CFO	A
➔	G/L Accounts		QSGGLACCTLST	GLOCFO	A
➔	Financial Statements		QSGGLFSMAIN	GLOCEOCFO	A
➔	Financial Analysis		WIFINHUB	CFOCEOGLO	A
➔	Contract Hub		WICONTRACTHUB	SVM	A
➔	Competitors		WICRMOPPCOMP	SLOSML	A
➔	CRM Reports		WICRMREPORTS	SLOSML	A
➔	CRM Opportunities		WICRMOPPS	SLOSML	A
➔	Available Reports		QSRPTHUB		A

Total Records: 12

List Portal Menu

List Portal Toolbar

The List Toolbar provides the following options for controlling the icons displayed:

- **Refresh** – Reload the menu
- **Filter by Role** – Select a single role or all roles – if you select a single role the menu will show only portals associated with that role
- **Category** – You may select a category (Roles, People, Entry, Analysis) or include all categories

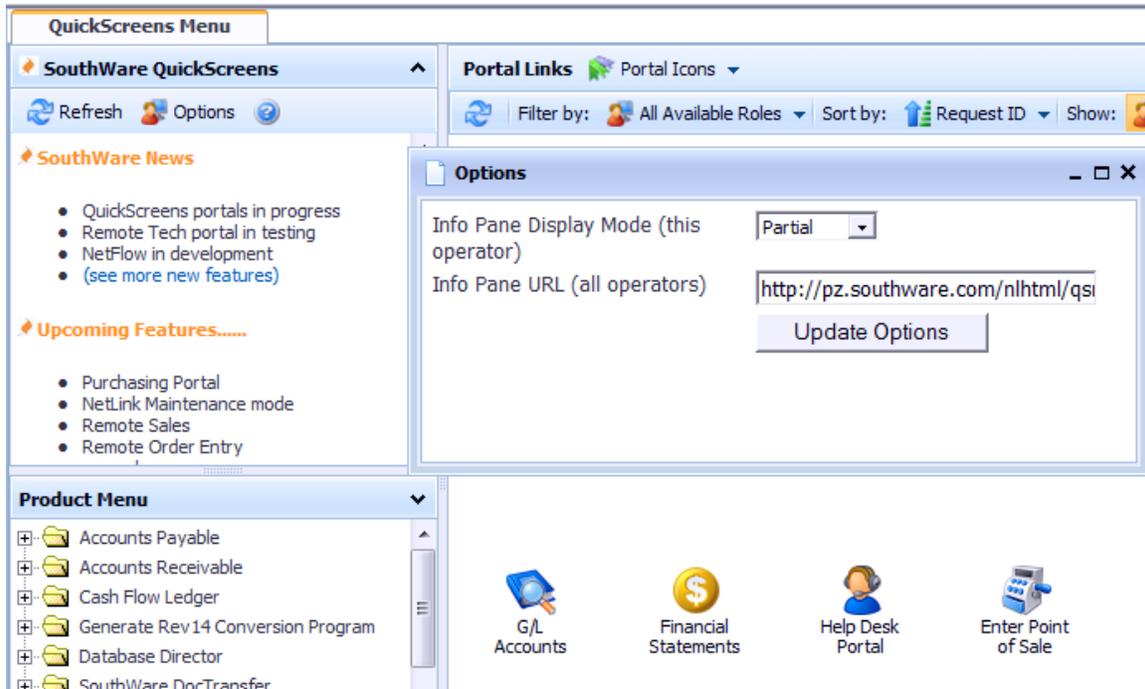
The options you select are automatically saved and are used the next time you display the menu.

The grid also allows:

- Filtering for each column by entering a filter value at the top of the column
- Sorting by clicking on the header for a column

Info Pane

The Info Pane displays an informative web area in the upper left of the menu. This is intended to be used for current news, reminders, and tips.



Info Pane/Options

The URL for the Info Pane defaults to a standard info page from SouthWare’s web site. You may change both the display settings and the URL for the page displayed in the Info Pane via the Options button.

Options

The Options button lets you configure the Info Pane options. Click on it to display a window to edit the following options:

Info Pane Display Mode (this operator):

Specify your preference for displaying the info pane:

- **Expanded** – This will collapse the Classic Menu tree and show the Info Pane fully expanded in the left column.
- **Partial** – This will display both the Info Pane and Classic Menu tree in the left column (this is the default).
- **Hidden** – This will collapse the Info Pane and show the Classic Menu tree fully expanded in the left column.

Info Pane URL (all operators):

(Requires SwiftMate security level of at least 6)

Here you may override the Info Pane URL for your company. This will change the URL for all operators in the company, not just the current operator.

Enter any valid URL to display in the Info Pane area. The URL should display a page designed to fit in the narrow width of the Info Pane.

Note on browser caching:

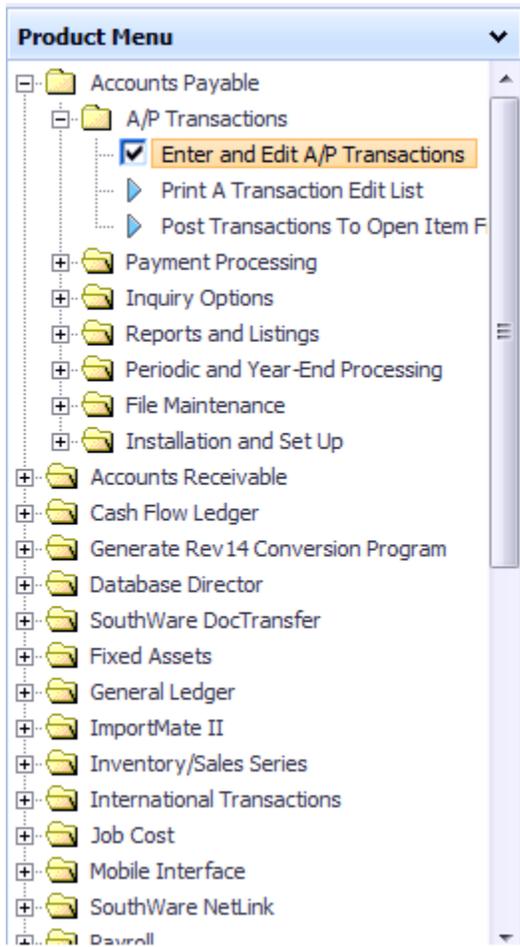
If you are using a static page your browser may cache the page and not show the most current version. You can force the browser to load your page each time by inserting meta tags within the head section at the top of your page:

```
<META HTTP-EQUIV="Pragma" CONTENT="no-cache">  
<META HTTP-EQUIV="Expires" CONTENT="-1">
```

Click the Update button to save your options.

Classic Menu

The classic menu tree displays the standard SouthWare menu options. The menu shows only the options allowed by your operator security clearance.



Classic Menu

If you click on a menu item it expands to show the options within that menu. If you click on a program the program is launched. A checkmark appears beside launched items – this can be helpful in checklist menus to show you which options have already been selected.

Global Find/Navigate

The Global Find/Navigate feature lets you search for documents or other records across all major SouthWare files, then zoom to the related portal for a record. This means you don't have to know which portal to access for a search – you can search and then instantly zoom to the appropriate portal.



In the Find field you may select the type of search:

- **Name** – Select the Name option and then enter a name or partial name in the search field. This does a mask match (wildcard) search within the following files:
 - Sales order – bill to name and ship to name
 - Service order – service order customer name
 - Job – description lines
 - Stock Item – key word file
 - If using TaskWise:
 - Relationship name
 - Contact name
 - Task reference
 - Project relationship name
 - If not using TaskWise
 - Customer file – name
 - Vendor file – name
 - Employee file - name
- **Document#** - Select the Document# option and enter a document number in the search field. This launches a search for the document number in the following files:
 - Sales order – order # and customer PO #
 - Service order – service order #and customer PO #
 - Invoice – invoice #
 - A/R open items – document #
 - A/R sales transactions – document #
 - A/R cash receipts – check #
 - A/P open items – document #
 - A/P transactions – document #
 - Jobs – job #
 - Purchase orders – purchase order #

Find List

When you launch a find the QuickScreens menu will create a new tab with the resulting search results.

QuickScreens Menu		Find Name com				
Name	Reference	Source Type	Customer #	Vendor #	DD File Name	
	Computer Warehouse Omaha	Vendor #: 81	Vendor	81	AP01	
	Technical Computer Center	Customer #: 43	Customer	43	AR01	
	Johnson Lumber Company	Customer #: 74	Customer	74	AR01	
	Harrelson's Computer Centre	Customer #: 810	Customer	810	AR01	
	Dell Computer System	Stock #:600 Loc:001 Desc:Dell Computer System	Stock		IV01	
	Dell Computer System	Stock #:9298383 Loc:001 Desc:Dell Computer System	Stock		IV01	
	Complete Office System	Stock #:Office System Loc:001 Desc:Complete Office System	Stock		IV01	
	Harrelson's Computer Centre	Order #: 168 Bill-to	Sales Order		RS07	
	Harrelson's Computer Centre	Order #: 263 Bill-to	Sales Order		RS07	
	Johnson Lumber Company	Order #: 1477 Bill-to	Sales Order		RS07	
	Testing Company	Svc Order #: 00100005210 Scheduled: 00/00/00	Service Order		SV04	
	Testing Company	Svc Order #: 00100005224 Deleted: 00/00/00	Service Order		SV04	
	Testing Company	Svc Order #: 00100005226 Scheduled: 00/00/00	Service Order		SV04	
	Testing Company	Svc Order #: 00100005227 Scheduled: 00/00/00	Service Order		SV04	
	Testing Company	Svc Order #: 00100005228 Scheduled: 00/00/00	Service Order		SV04	
Total Records: 15						

Example Find List

The list shows all matching records for the name or document # you entered.

- The “Source Type” column shows the file in which the record was found.
 - If you are using TaskWise, any relationships will show the Source Type as the customer, vendor, or employee file rather than the relationship file.
- If the search results in a large number of records you may use the column filters to further refine the search.

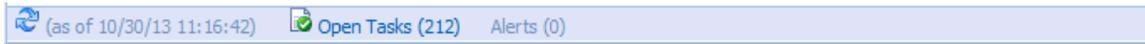
Zoom Options

When you click on the green arrow to zoom to a record the resulting zoom is based on the Source Type. For example, if you choose to zoom on a customer you will go to the related customer portal view.

Status Bar

(If you do not use TaskWise this area will be blank.)

The status bar shows current totals for Tasks and Alerts. The status bar info is automatically refreshed each time you display the QuickScreens menu. You may also click on the Refresh icon to refresh the totals at any time.



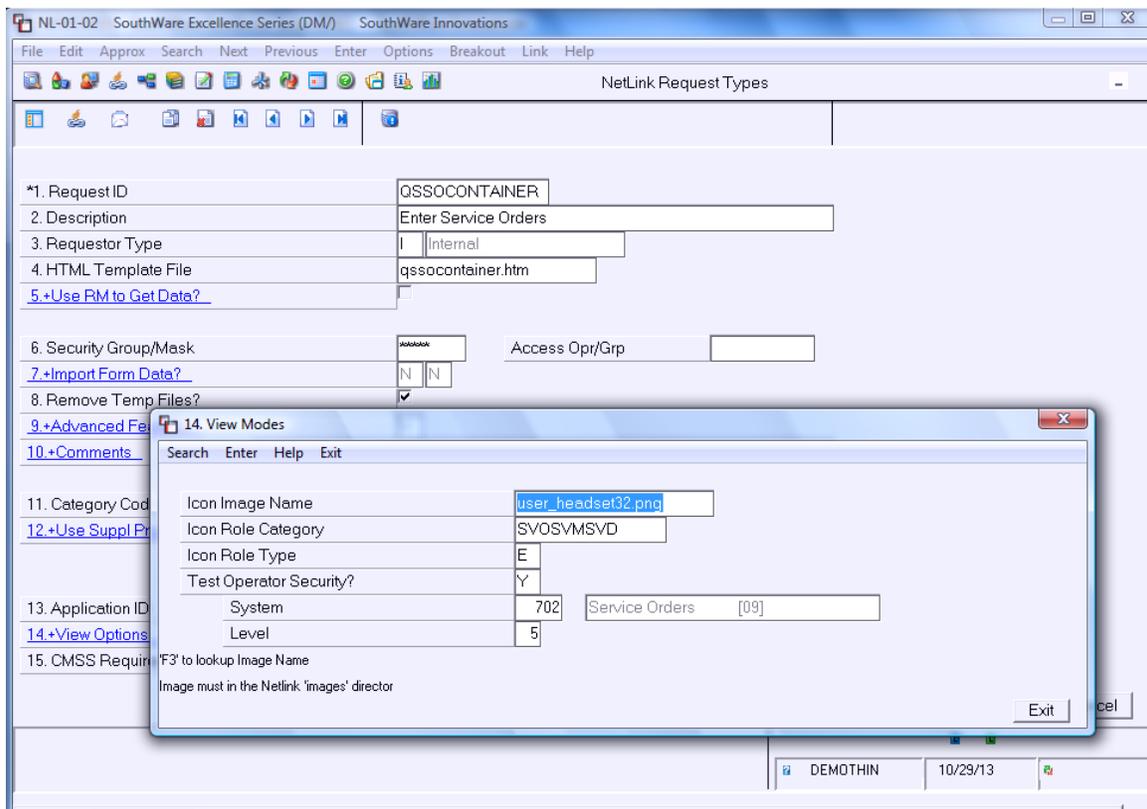
Configuration Options

The only configuration for the QuickScreens menu is the options for the Info Pane. See the Info Pane discussion for more details.

If you change portal menu style the system remembers this and will automatically make this your default.

Portal-Related NetLink Request Features

The Portal menus display the NetLink requests that are specified to be portal views. These are requests that are designed to be called directly as stand-alone pages. This is configured in field 14 of the NetLink request data (NL-01-02).



Example View Options

Icon Image Name:

Enter an image name of an image file located in the NetLink images directory. The standard images are 32x32 icons. *If you do not enter an image for a request, the request will not appear in the portal menu.*

Icon Role Category

Specify which role(s) are appropriate for this request. You may enter up to five three-character role codes. The filter options in the portal menus match the selected role to the values in this field.

The standard role codes are:

- APO – A/P operator
- ARO – A/R operator
- AUD – Auditor
- BUY – Buyer
- CFO – CFO Financial officer
- CEO – CEO Executive officer
- DIR – Director
- CSV – Customer Service Rep
- EQU – Equipment Management
- GLO – G/L operator
- INV – Inventory Management
- OEO – Order Entry operator
- POS – Point of Sale operator
- PRO – Payroll operator
- SLO – Salesperson
- SLM – Sales Management
- SVO – Service Order operator
- SVD – Service Order Dispatcher
- SVM – Service Order Management
- TEC – Technician
- WHO – Warehouse operator
- ADM – System Administrator
- DEV – Tools Developer
- OPR – Logon Operator Settings

Special role codes are:

- ALL – shows for all roles
- (blank) – shows only if you select “All Available Roles” for the filter

Icon Role Type

Specify the category that indicates the general purpose of this request. This is used in filtering the portal menus.

Valid types are:

- R – Role – designed to be a role portal
- P – People – designed to display people-oriented info
- E – Entry – designed for data entry
- A – Analysis – designed for analysis of data

Test Operator Security

Specify whether you want NetLink to test the operator security clearance before processing this request. If you enter "Y" you must enter the following fields:

- System

Specify the SouthWare system number (or use the lookup feature).

- Level

Specify the security level required for the specified system.

Technical Notes

Below is a list of the NetLink request pages specifically for this portal:

- QSMENU – main page
- QSMENUOPTS – pop up window of options
- QSMENUFIND – list results from global find
- QSMENUGET – build standard menu tree
- QSMENUGETSTS – update Status bar
- QSMENUICONS – portal icon menu
- QSMENULIST – portal list menu