



Application Utilities

User Guide

Version 3.0



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Table of Contents

Chapter 1
Software Basics 1

Menus 1
Standardized Options 2
Buttons 2
Work with Screens 3
Common Work with Tasks 3
Function Key Tasks 6
Exit and Cancel (F3 and F12) 6
Prompt (F4) 6
Refresh (F5) 7
Add (F6) 7
Backward (F7) 7
Resequence (F9) 7
Report Defaults (F15) 7
Print (F17) 8
Other Standard Functions 8
OK (Enter) 8
Tab 8
Scroll Bar (F7 and F8) 8
Check Box 8
Radio Set 8
Data Entry Fields 9
Required Fields 9
Promptable Fields 9
Validated Fields 10
Informational Fields 10
Date Prompt 10
Tables and Table Codes 11
Favorite (Logos only) 12
Wildcard Searches (Logos only) 13
Full Exit (F7) (Logos only) 17

Chapter 2
Help Text Processing 21

Online Help Text 21
Overview Help Text 21
Field-Level Help Text 22
Scrolling Help Text Up or Down 22
Exiting Help Text 22
User-Defined Help Text 23
Help Text Index 23

Search Line Function 23
Move Function 24

Chapter 3
Dynamic Menu Processing 25

Dynamic Menu Setup 25
Edit Library List 25
Edit DYNMAIN Screen 29
Set up DYNMAIN Option 2, Work with Users 31
Dynamic Menu Options 35
Dynamic Menu Screens Flowchart 36
Work with Menus 36
Dynamic Menu Maintenance, Screen 1 38
Dynamic Menu Maintenance, Screen 2 40
Menu Code Maintenance 42
Work with Menu Options 42
Option Command Maintenance 44
Quick Entry 45
Copy Option Code 46
Rename Option Code 46
Dynamic Menu Mass Add 47
Work with Users 48
Work with User Menus 48
Menu Master File Listing 50
Menu User File Listing 51

Chapter 4
Work with Tables 53

Table Master Processing 53
Table Entry Processing 53
Adding Table Entries During Prompting 53
User-Defined Table Processing 54
Prompting 54
Work with Tables 55
Add/Change Table 56
Copy Table 56
Delete Table 58
Print Table 58
Work with Table Entries 59
Table Listing 61
Work with Tables Flowchart 61

Chapter 5
Work with Security Authorizations 63

Work with Application Programs 64
Applications Programs Security 64

Work with Security Authorizations **65**
User/Group Master File 66
Copy Authorization 67
Delete User/Group Master File 68
User Security Authorization Listing 68
Work with Program Authorization 69
Add/Change Program Security 70
Security Toggle Verification **71**
Work with Security Authorizations Flowchart **72**

Chapter 6
Work with Document Processing Control 73

Set up Document Control Files **73**
Document Authority and Security **74**
Work with Document Processing Control **74**
Add/Change Document Processing Control 75
Delete Document Processing Control 76
Control File Listing 77
Work with Document Processing Set-Up File 77
Add/Change Document Set-Up File 77
Work with Document User Security Set-Up 80
Work with Document Processing Control Screens Flowchart **82**

Chapter 7
Work with Documents 83

Document Types **83**
Work with Documents **84**
Create Document 85
Free-Form Document 85
Rename Document 86
Change Authority 86
Work with Documents Screens Flowchart **87**

Chapter 8
Work with Report Defaults 89

Base Report Defaults **89**
User Report Defaults **89**
Maintainable Report Attributes **89**
Screen Defaults **90**
Work with Report Defaults **90**
Add/Change Report Defaults 90
Display Defaults 91
Work with Distribution Codes 91
Work with Report Defaults Screens Flowchart **94**

Chapter 9
Available Options (Logos only) 95
User Setup 96
Dynamic Menu Update. 97

Appendix A
Application Utilities Security Table 103

Appendix B
Email Setup 109
Setting up Spooled File Emailing. 118
Sending a Spooled File by Email 120

Index 123

Chapter 1
Software Basics

This chapter provides an overview of the iSeries 400 screen types, processing options, functions and data entry methods that have been standardized throughout New World's software. **All new users should read this chapter.** You will learn the basic information needed to perform basic tasks in the *Application Utilities System*.

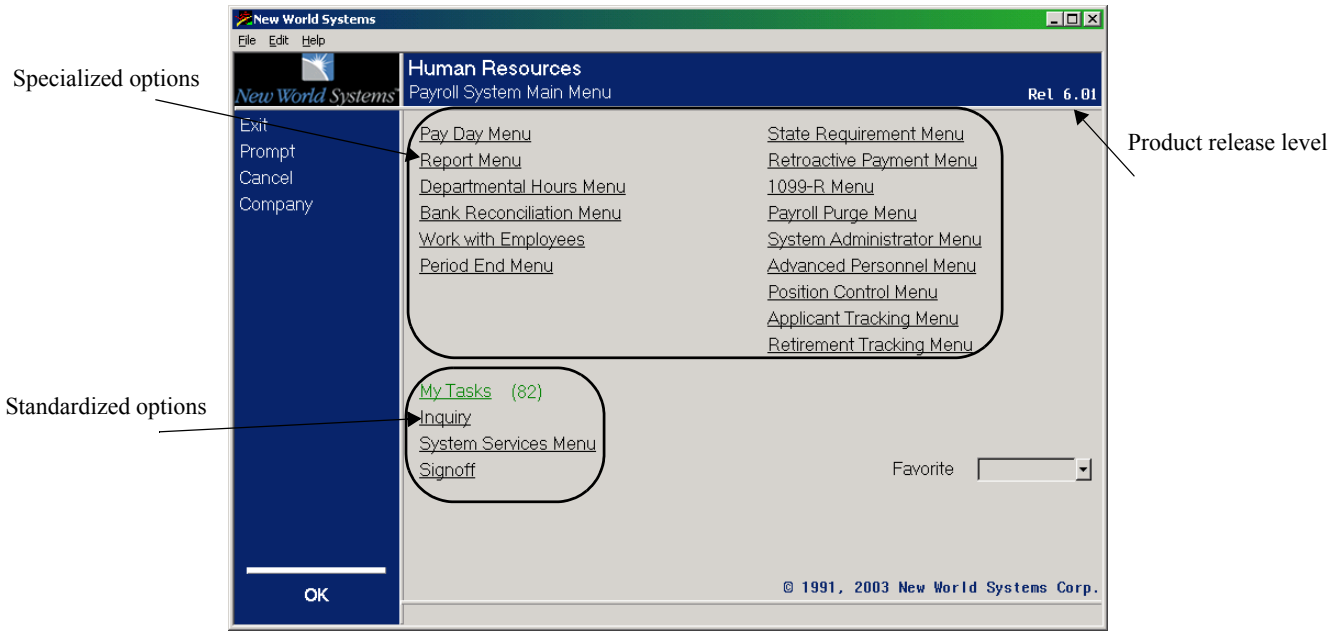
NOTE

Throughout this manual, sample screens are shown in the Graphical User Interface (GUI) format. Options, functions and fields are the same as those on the traditional iSeries 400 screens; however, instead of entering option numbers or pressing function keys, most selections may be made by pointing and clicking. Where appropriate, the equivalent option numbers and function keys are shown in parentheses.

Menus

Menus let you access different options within an application. A list of specialized and standardized options appears on a menu. Click an option to select it.

Below is an example of a menu:



The product release level is displayed in the top right corner of the screen.

Standardized Options

Unless otherwise noted, the following options are available on all main menus (the equivalent option numbers are shown in parentheses):

My Tasks (60) *(Logos Only)*

This option contains notifications that are generated when follow-up responses to automatic system processes are required or when data has changed as a result of system processes. When you select this option, all of the active notifications specifically related to your work will be displayed. You also may choose to receive notifications by e-mail.

Inquiry (70)

The *Inquiry Menu* provides a convenient route to system-wide information in display format only. The options on this menu let you access nearly all of the information in the application.

System Services Menu (80)

System services refer to iSeries-related activities, such as working with printers, operator messages and a variety of other technical issues. (For more information on system services, please see your IBM iSeries 400 documentation.)

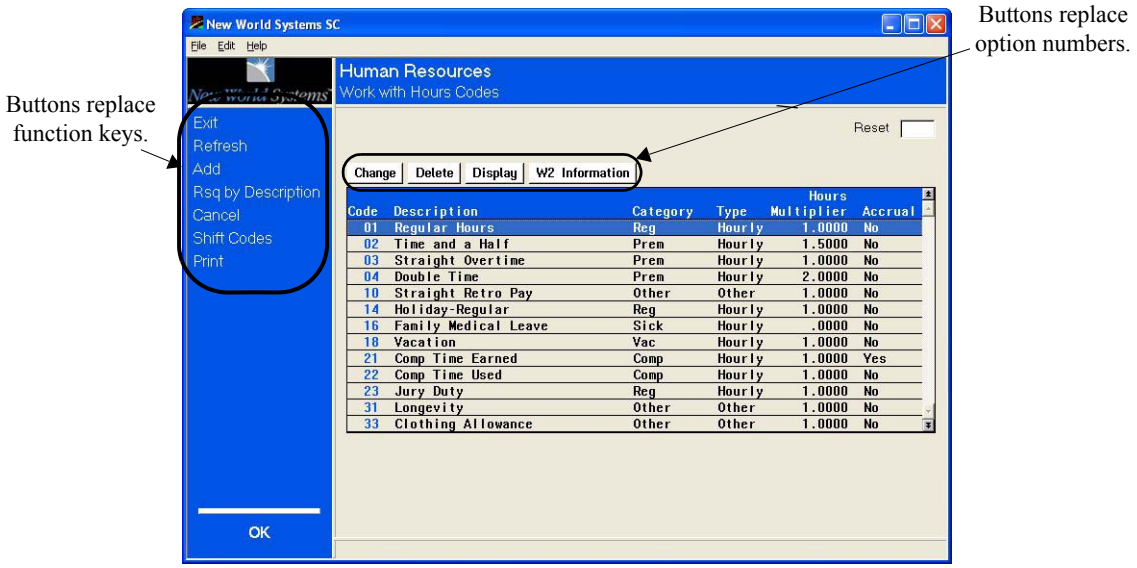
Signoff (90)

Click this option to exit the application. Your current job will end and the original sign-on screen will be re-displayed.

Buttons

Buttons perform functions previously assigned to function keys and option numbers.

Here is a sample of a screen where the functions are represented by buttons:



The buttons that duplicate function key tasks are displayed on the left sides of most screens. Refer to this area to see which functions are available. If you let the cursor hover over a button, the function key equivalent will display. This key also may be used.

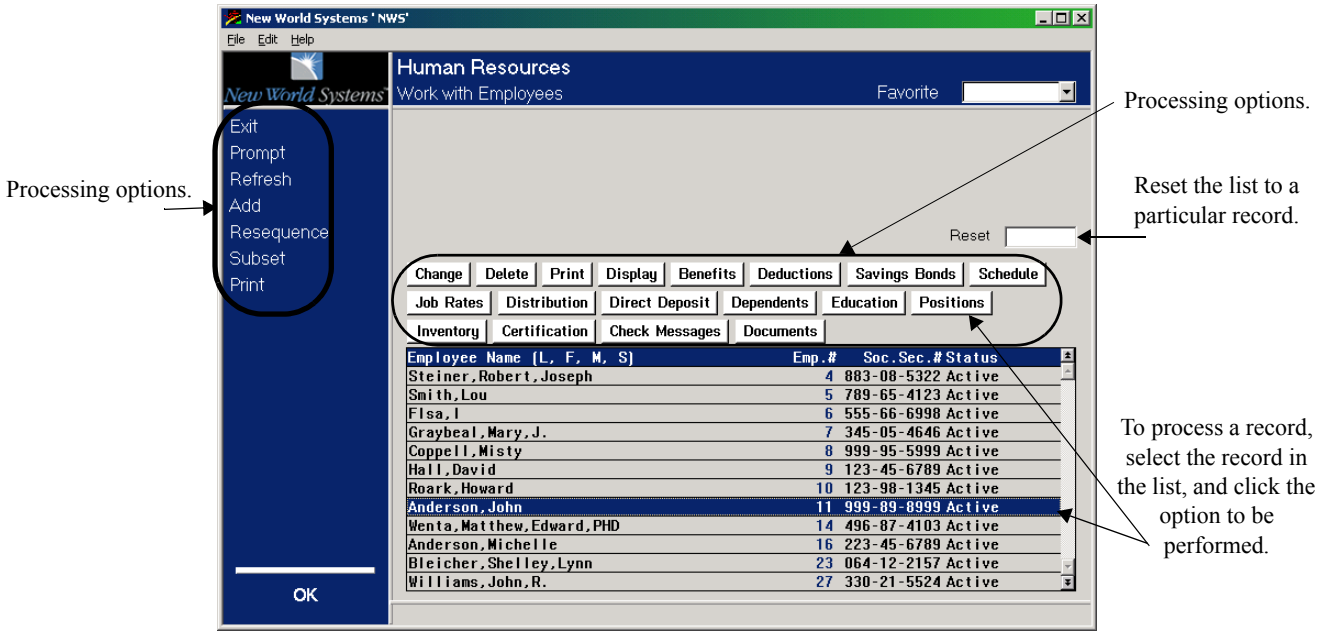
On *Work with* screens, the buttons that duplicate option numbers are displayed above the list of records.

Work with Screens

A *Work with* screen is comparable to a file cabinet for your records. When you go to a *Work with* screen, a list of records will be displayed from top to bottom (unless your system does not yet contain data).

Work with records are sequenced according to the highlighted column; for example, if the Employee Name column is highlighted, the list will be ordered alphabetically by the employee name. In many cases, the sequencing scheme of a *Work with* screen may be changed by clicking **Resequence** (see page 7).

The figure on the next page shows a typical *Work with* screen:



When you first enter a *Work with* screen, the buttons displayed above the list of records are "dimmed," or not available for use, because a record has not been selected in the list. To select a record, click anywhere on the row of the record you want to select. This action will activate the buttons, and you may then select one to work with a particular set of data or perform a particular function.

Common *Work with* Tasks

The following procedures may be performed from most *Work with* screens (the equivalent option numbers and function keys are shown in parentheses):

Add (F6)

To create a new data record, click this button. A blank record will be displayed in "Add" mode.

Change (2)

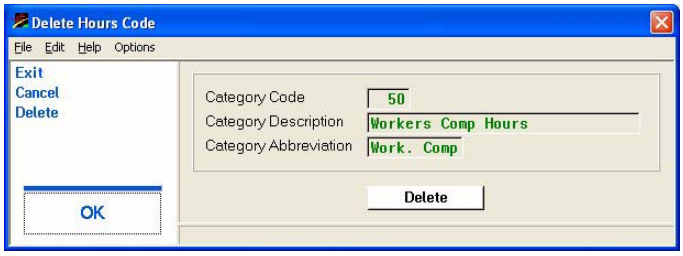
To change an existing data record, select the row that represents the record you want to change, and click this button, or double-click the row. The record will be displayed in "Change" mode.

NOTE

You can determine the mode of a screen by looking at the title in the upper-left corner. Examples of titles are "Add Employee's Benefits" and "Change Employee's Deductions."

Delete (4)

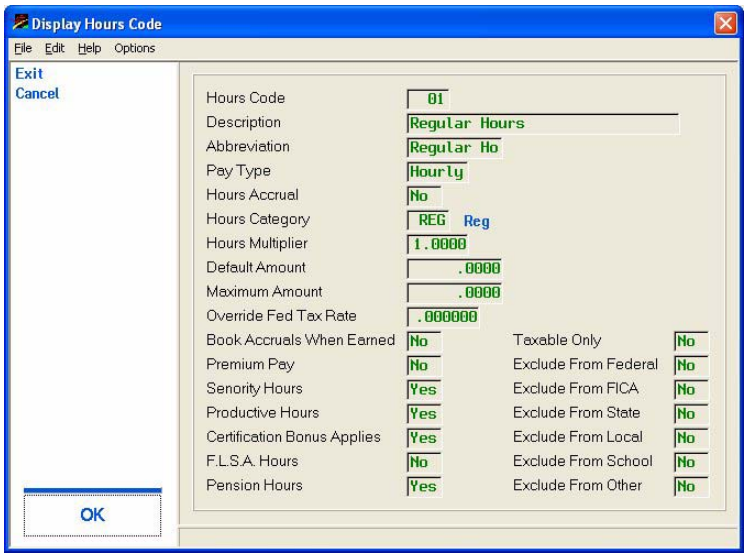
To delete an existing data record, select the row that represents the record you want to delete, and click this button. You will see a screen like the following:



To confirm the delete, click **Delete**. To cancel the delete, click **Exit** or **Cancel**.

Display (5)

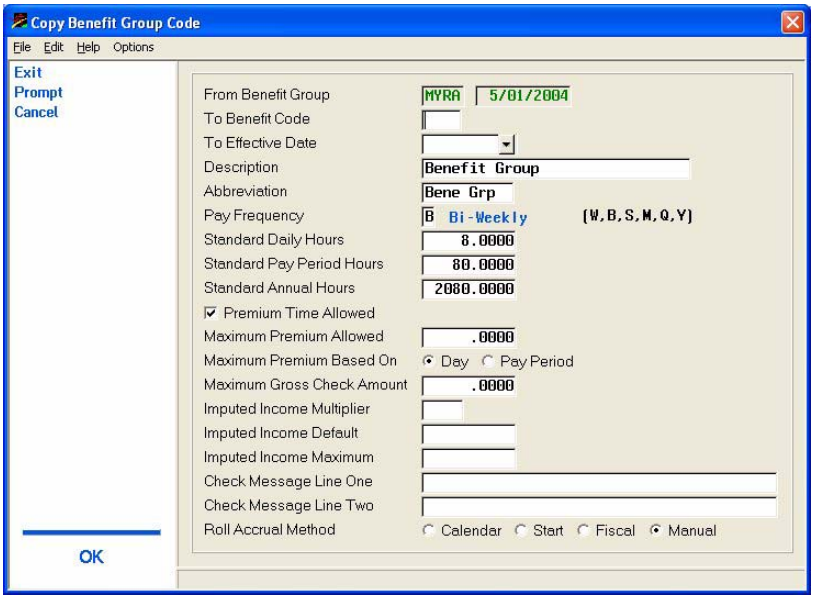
To display an existing data record, select the record you want to display, and click the **Display** button. You will see a screen like the following:



Data on a display screen cannot be changed.

Copy (3)

To create a new record by copying an existing record, select the row that represents the record you want to copy, and click the **Copy** button. You will see a screen like the following:

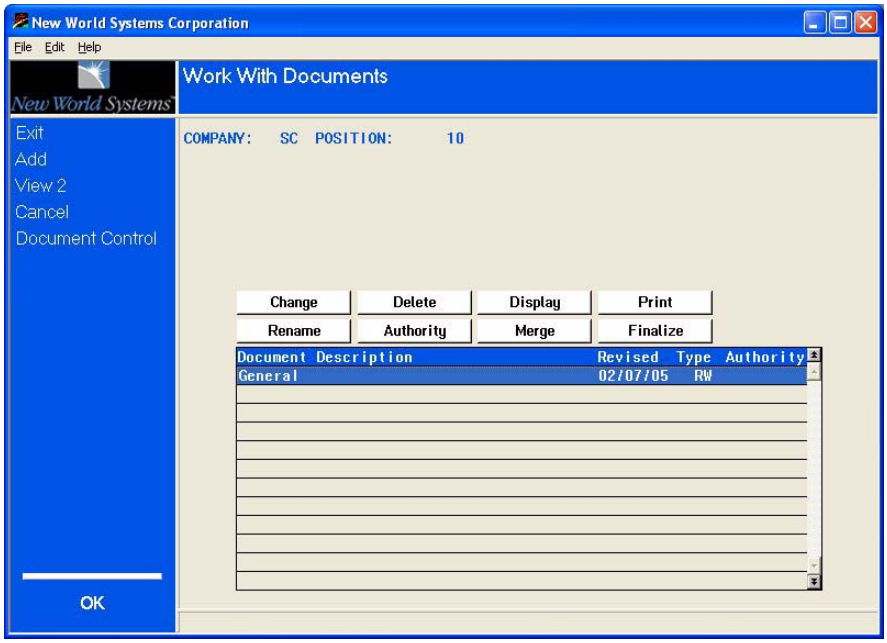


Print (6)

To print the data from an existing record, select the row that represents the record you want to print, and click the **Print** button. In most cases, a "report definition" screen will be displayed, letting you define the type and scope of the information to be included on the report.

Work with User-Defined Documents or Narrative (24)

To work with user-defined documents or narrative associated with a record, select the row that represents the record you want to work with, and click the **Documents** button. The *Work with Documents* screen will be displayed:



Function Key Tasks

Following is a list of the most common buttons that duplicate function key tasks (function key equivalents are shown in parentheses). These buttons are available on the left sides of most screens:

Exit and Cancel (F3 and F12)

Click **Exit** to go back to the original *Work with* screen (see *Work with* Screens, page 3) or **Cancel** to go back one screen. In both cases, unsaved entries will be lost. If you click the **Exit** button while processing multiple records from a *Work with* screen, the system will take you back to that screen, where the next unprocessed record will be positioned at the top. If you click the **Cancel** button in the same situation, the system will take you directly to the next unprocessed record.

Prompt (F4)

Place the cursor in a promptable field, and click this button to display and select from a list of valid entries for the field. Your selection will be entered automatically in the field.

Refresh (F5)

Click the **Refresh** button to update a *Work with* screen with information that recently has been added, changed or deleted.

Add (F6)

From almost any *Work with* screen, click this button to create a new record and add it to the *Work with* screen.

Backward (F7)

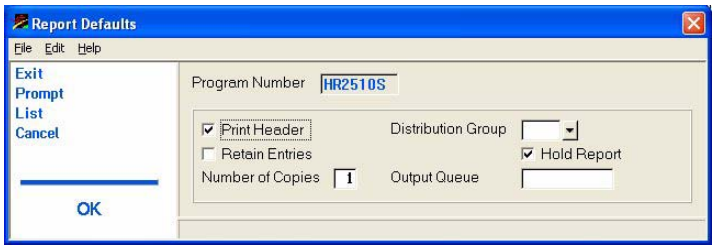
When you are in a maintenance program that has multiple screens, you may click the **Backward** button to go back to the screen immediately preceding the one displayed. This function is not offered on all screens.

Resequence (F9)

You may change the ordering scheme of the records listed on a *Work with* screen by clicking the **Resequence** button. This action will toggle the display between different ordering schemes or will open a window with several reset fields to use in resequencing the records.

Report Defaults (F15)

Many report screens have a **Defaults** button. Click this button to display the *Report Defaults* screen and change the printing defaults for a report. The figure below is an example of the *Report Defaults* screen:



The original defaults that appear for each report have been set up through the System Administrator Menu. To change the original defaults for a report, follow these steps:

1. From the *System Administrator Menu*, click **Security**.
2. Click *Work with Report Defaults*.
3. Select the report you want, and click **Change**. The *Report Defaults* screen for that report will be displayed.
4. After making your changes, click **OK** to save them. From that point, whenever a user selects the **Defaults** function for that report, the new defaults will be displayed.

Print (F17)

This button lets you print a report of all or part of the information contained in the records stored on a *Work with* screen. In most cases, a "report definition" screen will be displayed, letting you define the type and scope of the information to be included on the report.

Other Standard Functions

The following section describes additional functions that are standard for each application.

OK (Enter)

On the bottom left of the screen, the **OK** button functions the same as the **Enter** key on standard iSeries 400 screens. Click the **OK** button to save the entries you made on a screen or to make a program perform a task.

Tab

Whenever you fill a data entry field, press the **Tab** key to move the cursor automatically to the next field. This key also right-justifies all numeric and table fields.

Scroll Bar (F7 and F8)

If all data does not fit on one screen, a scroll bar is provided on the right side of the screen. Click the down or up arrow to move through the data. The system will display messages to let you know when you have reached the top or bottom of the data. Scroll bars generally are used on *Work with* screens that contain numerous records.

Check Box

During data entry, a check box lets you mark or unmark an item for selection. An example of a marked check box is displayed below:



To mark or unmark an item, point inside the box and click.

Radio Set

A radio set groups a related list of mutually exclusive items. An example of a radio set is displayed below:



To mark an item, point inside the related circle and click.

Data Entry Fields

In maintenance screens, data fields are the blank areas where you type information. Data fields may be one or more of the following types:

- Required
- Promptable
- Validated
- Informational

Required Fields

Required fields must contain data before you can add a new record or advance to another screen. If you click **OK** to add a record before completing a required field, the field will be highlighted and an error message will be displayed at the bottom of the screen.

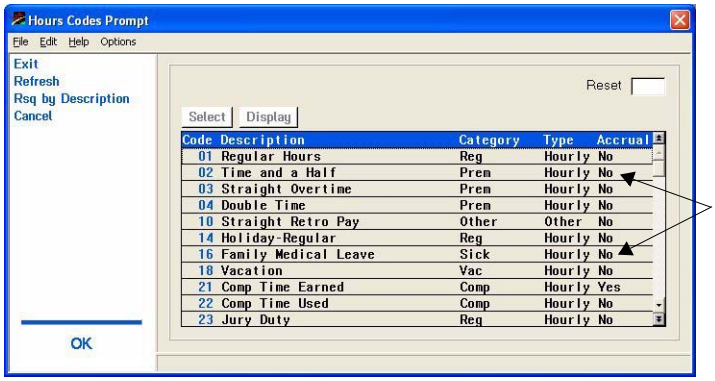
Promptable Fields

These fields may be "prompted" to display valid entries. A promptable field is identified by a button (+) to the right of the field:



Prompt button. Click to display valid entries.

To prompt the field, click the button (**F4**). A table of valid entries will be displayed:



Prompted list of valid entries. Select the entry you want, and click the **Select** button.

Select the entry you want, and click the **Select** button. The table will disappear, and the original screen will be re-displayed with the prompted field containing the entry you selected.

NOTE

If you prompt a field that already contains an entry and decide to exit the table without making a selection, the previous entry will be cleared.

Validated Fields

The system checks validated fields to ensure that you type information in the proper format; for example, the system validates all promptable fields against codes found in their corresponding tables. Other validated fields include the following:

Date Fields

Use only numbers and omit spaces, as in these examples for January 10, 2005, and October 1, 2005, respectively:

`011005` or `01102005`
`100105` or `10012005`

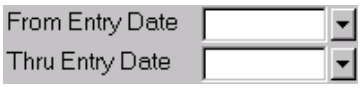
Time Fields

Use the 24-hour clock and the HHMMSS (Hours, Minutes, Seconds) format for all time entries; for example, enter 2:40:09 a.m. as **`24009`** and 2:40:09 p.m. as **`144009`**.

NOTE

Seconds are required for all time entry fields that are six characters in length.

Date and time ranges are used in many places throughout an application, particularly in report programs. Most ranges include "From" and "Thru" in the field names, as in this example of a date range:



All data that falls within the From and Thru range will be included in the program you run. To run the program for one date, enter the date in both fields. You also have the option of using the "Date Prompt" (see below) when entering dates.

Phone Numbers

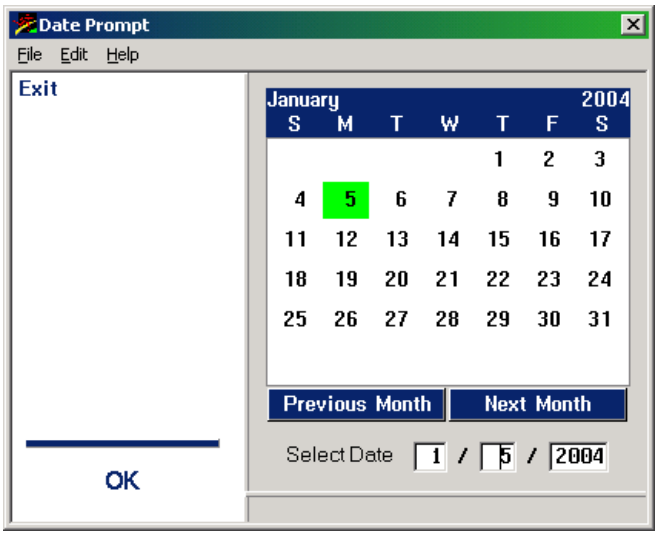
Include the area code and omit spaces, dashes and parentheses when entering phone numbers. For example, enter (248) 269-1000 as **`2482691000`**.

Informational Fields

Informational fields are data fields that are not required, promptable or validated. These fields also may be called optional because they do not need to be completed.

Date Prompt

The *Date Prompt* is displayed when you click the prompt button (**F4**) from a date field. The current month and year will be displayed, with today's date highlighted. Use the **Previous Month** button (**Roll Up**) to display the previous month, the **Next Month** button (**Roll Down**) to display the next month. Click the date you want, and it will be displayed in the ***Select Date*** fields:



NOTE

On the Date Prompt of a traditional screen, you must enter the date in the Select Date field manually.

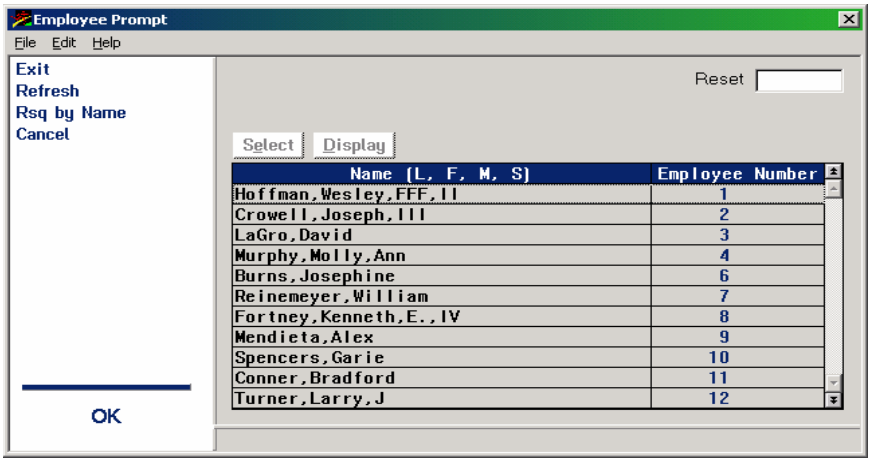
When the *Date Prompt* first is displayed, the ***Select Date*** fields will be defaulted with the current month, day and year. If you want, you may enter any part of the date manually.

After you have selected the date, click **OK** to have it entered automatically in the date field you prompted.

Tables and Table Codes

Throughout an application, tables and table codes are used to standardize entries you will make during the processing of records and related information. All tables contain table codes.

Any field with a prompt button (+) next to it will access a table and its table codes when you click the button (**F4**). Here is an example of a prompted table:



To select a code from the table, click anywhere on the row of the code you want, and click the **Select** button. (On a traditional screen, type a **1** in front of the row, and press **Enter**.) You also may double-click on the row to select it. The screen on which you were entering information will be re-displayed with the code you selected shown in the field you prompted.

NOTE

*If you are unsure which table code you want, select one, and click the **Display** button to view more details.*

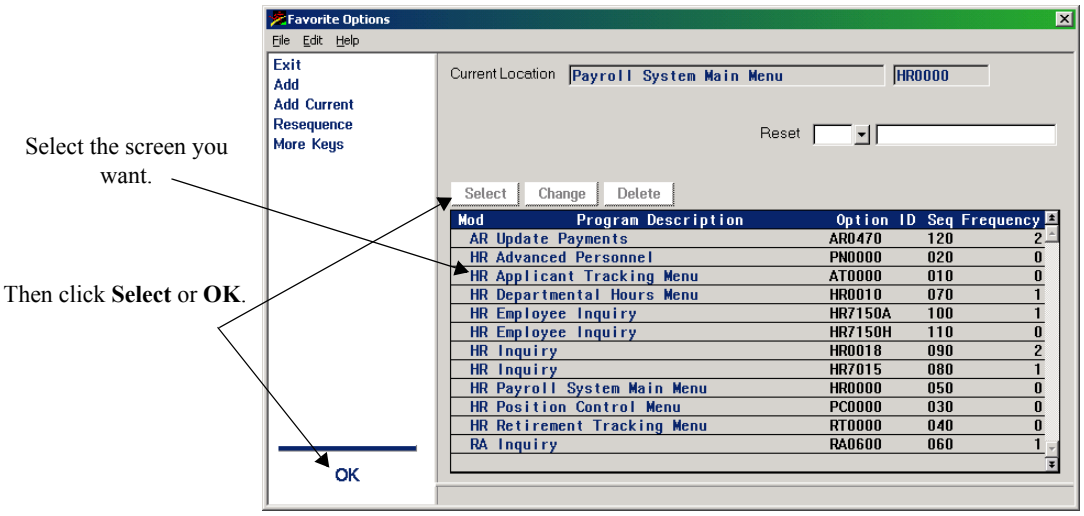
Tables and table codes are explained in depth in Chapter 3, "Work with Tables."

Favorite *(Logos only)*

This feature lets you go straight to the screens you most often use. A ***Favorite*** field is available in the upper right corner of many *Work with* screens and the lower right corner of every menu except the *State Requirements Menu*:



To use this field, enter the ID of the screen you want to go to, and click **OK**. If you do not know the ID, click the prompt button (**F4**) to the right of the field. The *Favorite Options* screen will be displayed:

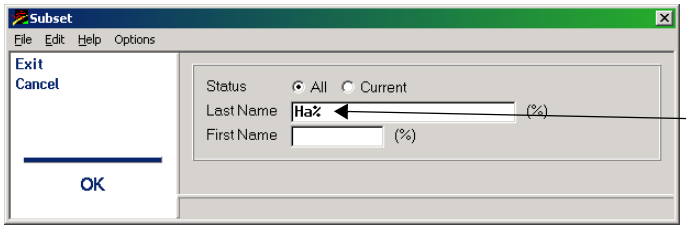


This screen lists all of the screens that have been set up as your favorites. Select the screen you want to go to, and click **Select** or **OK**.

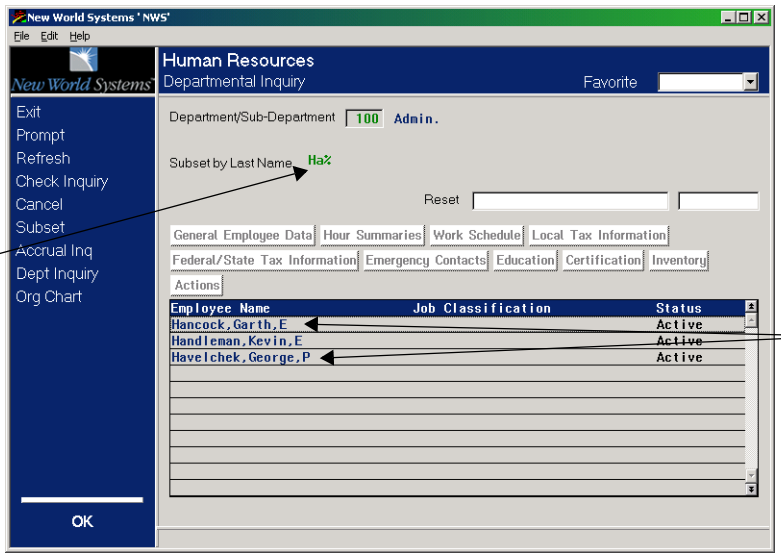
(For information on the setup of this feature, see Chapter 9.)

Wildcard Searches *(Logos only)*

The **Subset** functions of selected prompts and *Work with* screens provide a search feature that uses the percent symbol (`%`) as a wildcard character. Any Subset field that shows the percent (`%`) symbol to its right may be used in a wildcard search. Following are examples of how this feature works using the Subset function of the *Departmental Inquiry* screen:



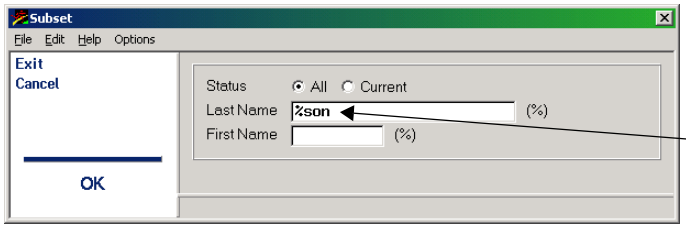
If you want the screen to show all employee last names that begin with the letters, *Ha*, type **`Ha%`** in the ***Last Name*** field, and click **OK**:



Current subset by Last Name, **Ha%**, shown near top left corner of screen.

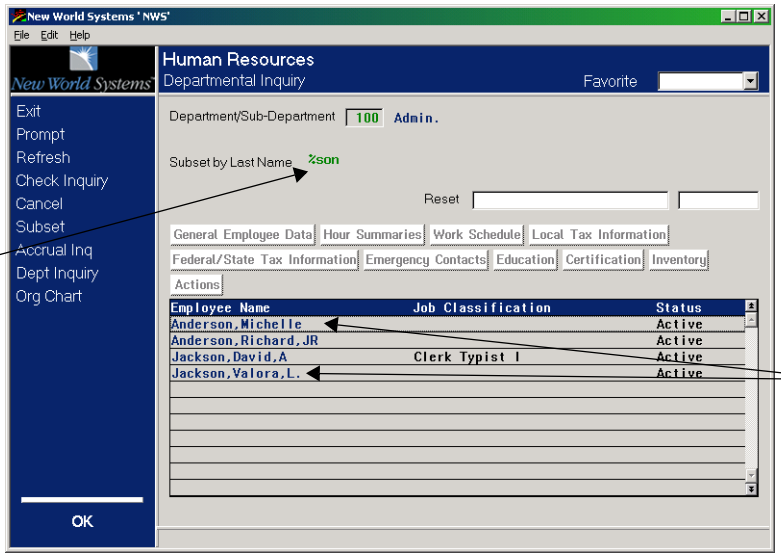
Departmental Inquiry showing all employee last names that begin with *Ha*.

The current subset of the *Departmental Inquiry* screen, **`Ha%`**, is displayed as the active subset near the top left corner of the screen. Until changed, the active subset will remain all last names that begin with *Ha*.



`%son` typed in the ***Last Name*** field.

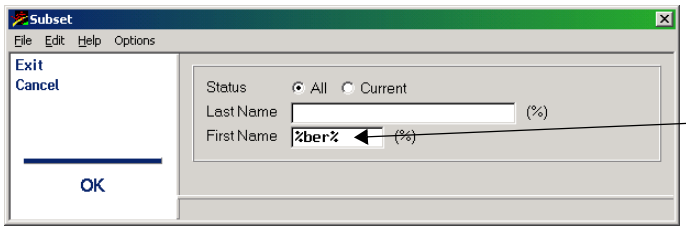
If you want to show all employee last names that <u>end</u> in *son*, type **`%son`** in the ***Last Name*** field of the Subset screen, and click **OK**:



Current subset by Last Name, **%son**, shown near top left corner of screen.

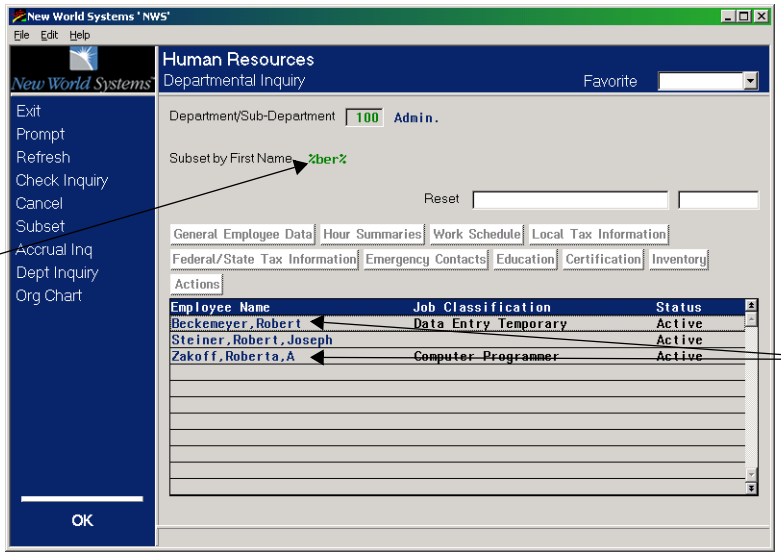
Departmental Inquiry showing all employee last names that end in *son*.

The current subset of the *Departmental Inquiry* screen, **%son**, is displayed as the active subset near the top left corner of the screen. Until changed, the active subset will remain all employee last names that end in *son*.



%ber% typed in ***First Name*** field.

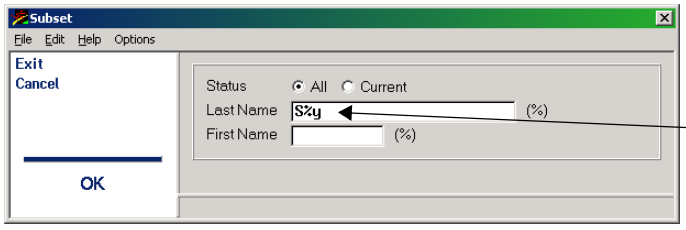
If you want to show all employees with first names that contain the consecutive letters, *ber*, type **%ber%** in the ***First Name*** field of the Subset screen, and click **OK**:



Current subset by First Name, **%son%**, shown near top left corner of screen.

Departmental Inquiry showing all first names that contain the consecutive letters, *ber.*

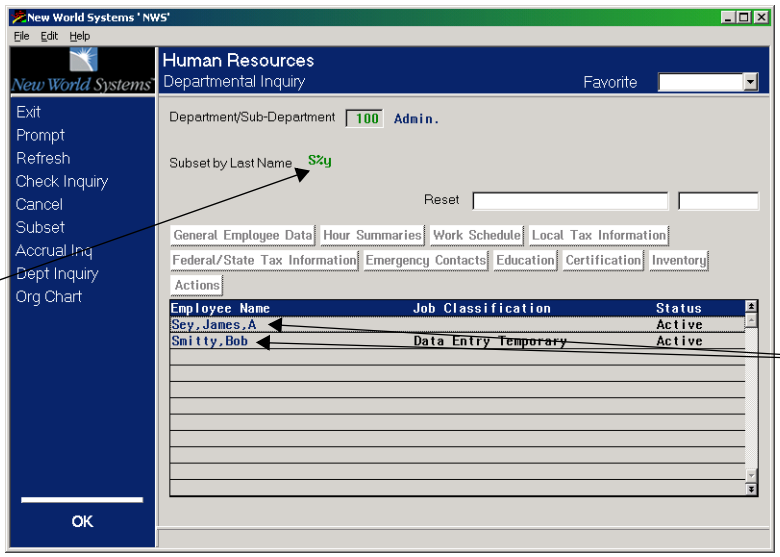
The current subset of the *Departmental Inquiry* screen, **%ber%**, is displayed as the active subset near the top left corner of the screen. Until changed, the active subset will remain all employee first names that contain the consecutive letters, *ber.*



S%y typed in ***Last Name*** field.

You also may use the wildcard **%** symbol to show all last names that begin with one letter, such as *S*, and end in another, such as *y*. To do so, type **S%y** in the ***Last Name*** field of the Subset screen, and click **OK**:

Current subset by Last Name, **S%y**, shown near top left corner of screen.



Departmental Inquiry showing all last names that begin with *S* and end in *y*.

The current subset of the *Departmental Inquiry* screen, **S%y**, is displayed as the active subset near the top left corner of the screen. Until changed, the active subset will remain all employee last names that begin with *S* and end in *y*.

In addition to *Departmental Inquiry*, the following screens offer the new Wildcard feature:

Screen	Screen Number	Wildcard Field(s)
Vendor Inquiry	AP0700	***Vendor Name***
Work with Customer	AR0120	***Customer Last Name, Customer First Name***
Customer Prompt	AR0270	***Customer Last Name, Customer First Name***
Accounts Receivable Inquiry	AR0365	***Customer Last Name, Customer First Name***
Accounts Receivable Payment Prompt	AR0455	***Customer Last Name, Customer First Name***
Work with G/L Accounts	GL0510	***Account Description***
G/L Account Prompt	GL0660	***Description***
Work with Vendors	GL0860	***Vendor Name***
Vendor Prompt	GL0980	***Vendor Name, Vendor Contact Name***
Financial Inquiry	GL1300	***Subset by Description***
Work with Employees	HR1070	***Last Name, First Name***
Employee Prompt	HR1095	***Employee Name***
Work with Employee Hours	HR2020	***Last Name, First Name***
Employee Inquiry	HR7150	***Last Name, First Name***
Departmental Check Inquiry	HR7440	***Employee Last Name, Employee First Name***

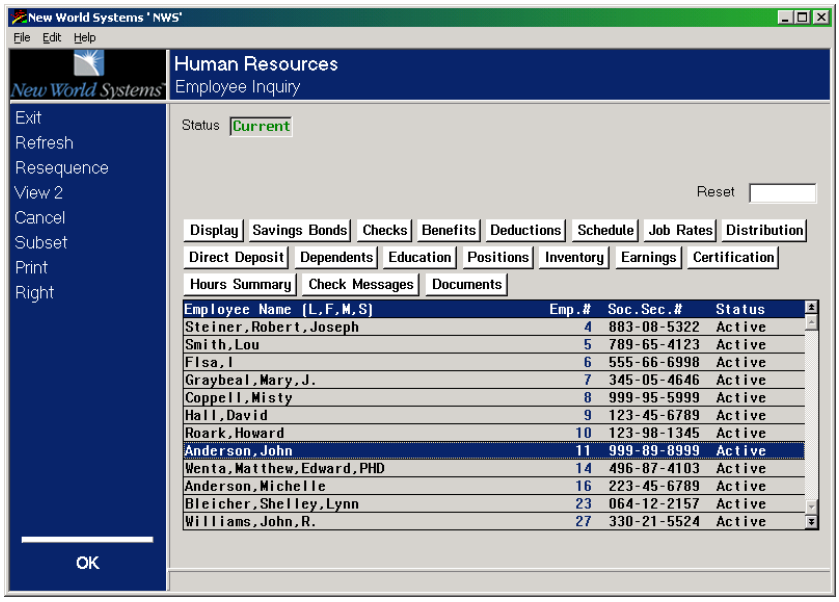
Screen	Screen Number	Wildcard Field(s)
Departmental Hours Category Inquiry	HR7450	***Last Name, First Name***
Revenue Accounting Inquiry	RA0610	***Received From***

Full Exit (F7) *(Logos only)*

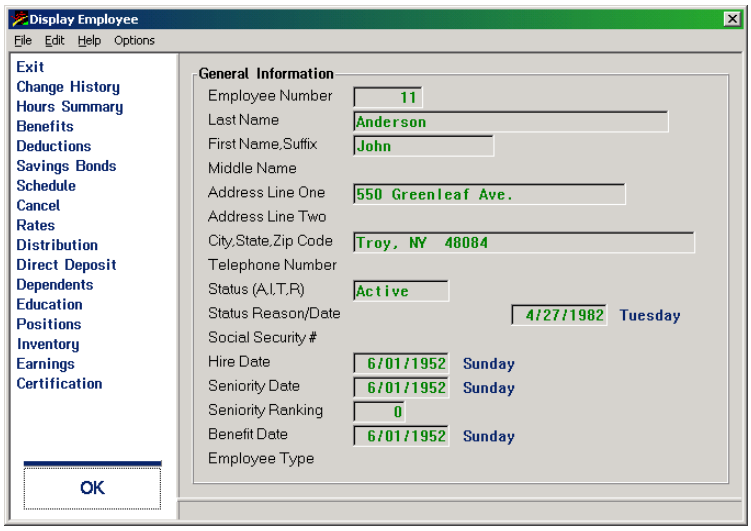
If you have entered through a series of Inquiry screens and need to return to the originating screen, the **Full Exit** function lets you do so in one step.

The following is a brief example of how this function may be used:

1. From the *Payroll System Main Menu*, select *Inquiry.*
2. Select *Employee Inquiry*:

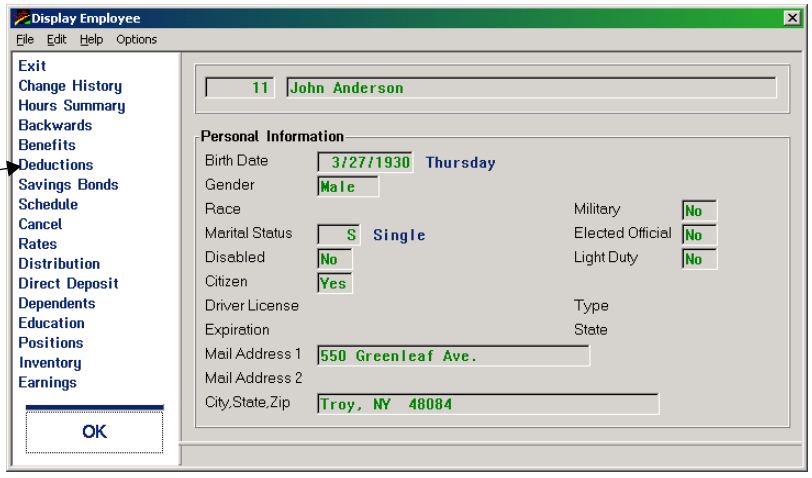


3. Select the employee record you want, and click **Display** (**5**). The first *Display Employee* screen will be displayed:



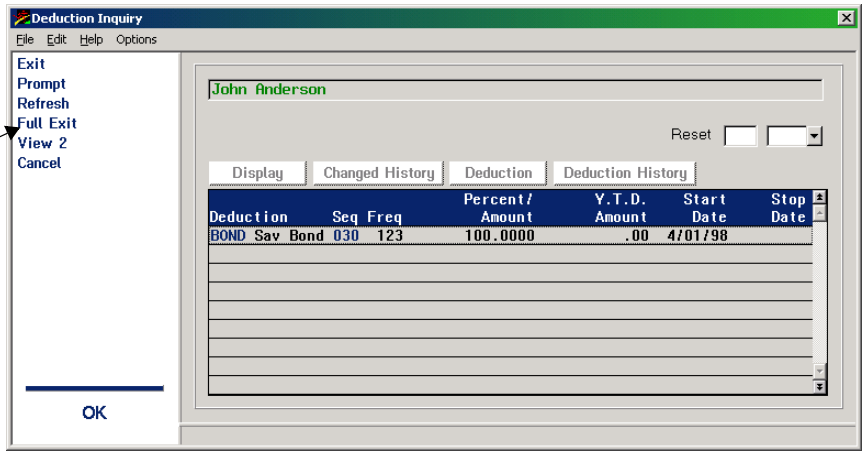
4. Click **OK** to go to the second *Display Employee* screen:

Deductions button.

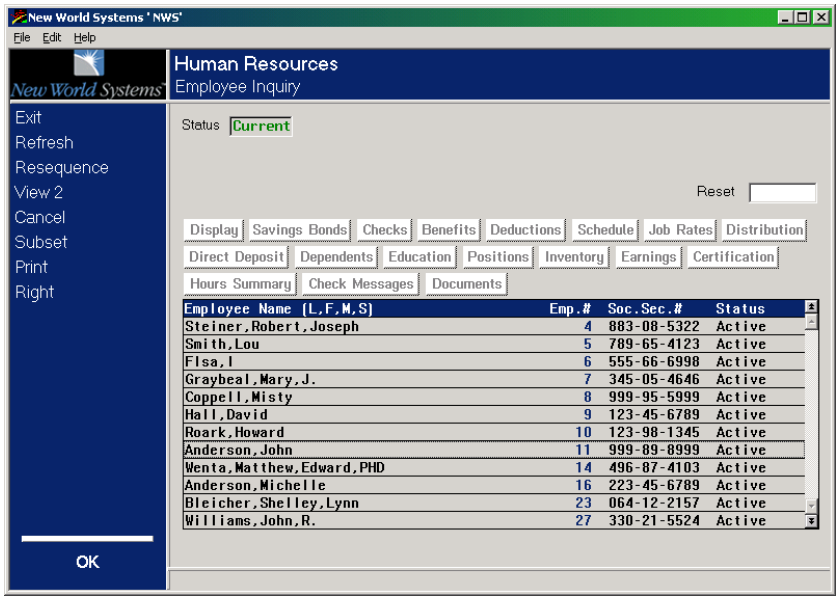


5. Click the **Deductions** button (**F9**). The *Deduction Inquiry* screen will be displayed:

Full Exit button.



6. Click **Full Exit** (**F7**). The original *Employee Inquiry* screen will be re-displayed:



Chapter 2
Help Text Processing

If you design your own menus using Dynamic Menu Processing, you also may write your own help text to go with them. This chapter of *Application Utilities 3.0* provides basic information that is necessary to understand the **help text** function. It takes you step-by-step through all of the standard help text features.

Online Help Text

All of New World's software comes with an online help text feature. There are two types of help text: overview and field level. The online help text is a helpful and informative feature that should be used whenever you need information about a screen or field. If the help text does not answer your question, please see the corresponding section in the application user guide; it may contain additional information that does not appear in the help text.

Unless the help text administrator chooses to set up the help window so that it always appears in a particular location of the display, it typically will be displayed immediately below or above the field for which help was selected.

NOTE

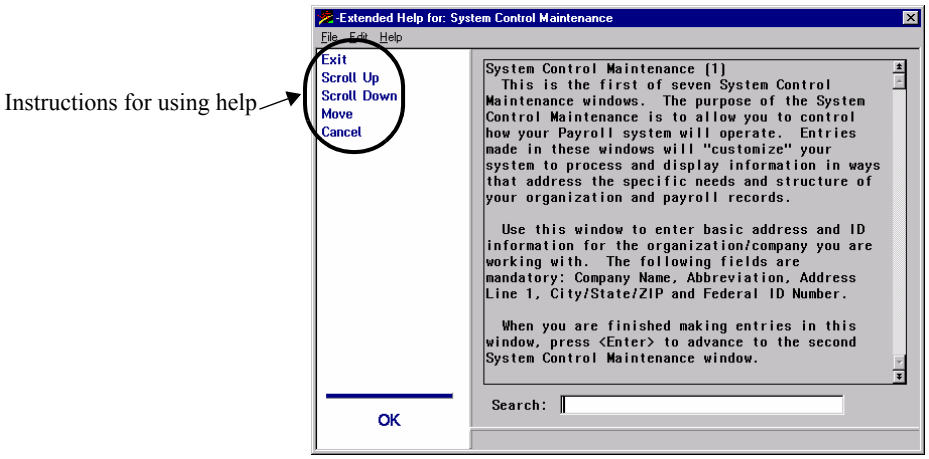
Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

Overview Help Text

The overview help text gives a general description of the current screen that includes special instructions on using that screen. It also provides details on processing options and function keys that may be used.

To access the overview help text from a GUI screen, click **Help (F1)** at the top of the screen, then **Screen Help**. A help window will be displayed with the help text inside. Click **Extended Help (F2)** to increase the size of the window and view more help text.

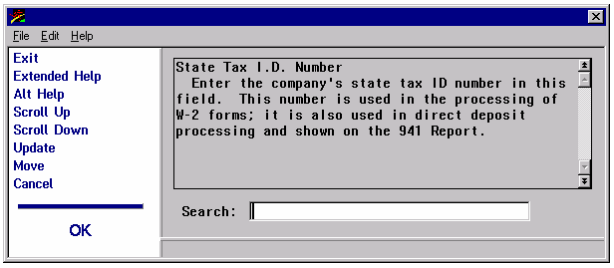
Below is an example of overview help text:



Instructions for using the help features are found in the same window as the help text itself.

Field-Level Help Text

The field-level help text describes a particular field and gives instructions on typing information in that field. To access field-level help for a particular field, place the cursor in the field and press **F1**. As with the overview help text, a window containing help text will be displayed:



If you click **Extended Help** (**F2**) while viewing field-level help text, the overview help text will be displayed.

Scrolling Help Text Up or Down

If all of the help information does not fit in one window, click **Scroll Down (F8)** to display the next page of help text. When the end of the help text has been reached, click **Scroll Up (F7)** to display previous pages of help text.

Exiting Help Text

To exit the online help text and return to the screen from which you started, click **Exit (F3)**, **Cancel (F12)**, or press **Enter.** Cancel and Enter will end each section of the help display one at a time; for example, if the help text **Index** (see page 23) is displayed, Cancel or Enter will end the Index portion and return you to the help window from which the Index was accessed.

Exit will close the help window and return you to the application program.

NOTE

*The **Enter** key and function key F12, though not displayed on the bottom of a traditional iSeries 400 help window, are in fact activated.*

User-Defined Help Text

If you are authorized to maintain New World help text, clicking **Update (F9)** will let you add, change or delete help text interactively. If you are not authorized, this function will not be available on the help text window and will not be activated; however, you may enter alternative, or user-defined, help text by clicking **Alt Help (F4)** from an overview or field-level help window.

When you click **Alt Help**, the yellow *Alternative Help* window will be displayed. Click **Update**. A help window of blank lines will be displayed. Use these lines to enter help. To save the new help and return to the *Alternative Help* window, press **Enter**.

NOTE

All New World help text windows are red; all user-defined help text windows are yellow.

Help Text Index

The Help Text Index is a list of all help text for an application. This feature lets you search and display help label descriptions. Pressing **F11** from an overview or field-level help window will display the list of labels, beginning with the label that currently is in the help text window.

You may view multiple index descriptions simultaneously. Use the **Enter** key to end one detailed help display and go to the next one selected. After all detailed help has been displayed, the system will return you to the Help Text Index.

You may use the ***Search*** line (see below) to limit the list by entering a word or partial word. The list will display only those index descriptions that contain the word or partial word entered.

To view the detailed help text for any help label, enter a **1** in the **OP** column to the left of the description, and press **Enter**. Once you have selected the detailed help text, all of the normal help text features and function keys will be operational.

Search Line Function

The ***Search*** line lets you search for a word or partial word in the help text. You may use this function to go directly to a particular word or to display only the lines of help text containing that word.

To display all lines in which a particular word appears, type the word in the Search line, and press **Enter**.

Use the word *Go* in front of the search word to position the help text at the first occurrence of the word. If you enter *Go State* in the Search line, the help text will be positioned at the first occurrence of the word *State*. This feature is not case sensitive. Upper and lower case letters are interpreted the same.

Similar to the Search line within a help text window, the Search line within the Help Text Index will search the index descriptions. You may narrow the list of index descriptions or use the word *Go* to go to a specific index description.

Move Function

Use the Move function to move any line of help text to the top of the help window. Place the cursor on the line of help that you want to be the top line, and click **Move** (**F10**).

The Move function also may be used with the Help Text Index. If you place the cursor on an index description and click **Move**, the Help Text Index will be reset with the selected index description at the top of the list.

Chapter 3
Dynamic Menu Processing

Dynamic Menu Processing is a utility that lets you define and maintain menus, including layouts, wording, colors, valid options, function keys, help text and other characteristics. This utility may be used as a complete menu system for all users, providing access only to those options, menus and programs that you select. Menus include those provided with New World applications and those you create.

Your system comes with a dynamic menu, *Dynamic Master File Maintenance* (*DYNMAIN*), that gives you access to the following dynamic menu processes:

- Adding and changing dynamic menus.
- Adding and changing menu codes.
- Specifying the dynamic menus that are accessible to each user.
- Printing reports that show the text of dynamic menus, menus codes, options and functions.
- Printing reports that show the menus to which each user has access.

As part of the installation of New World software applications, your Customer Support Representative will have set up the initial menu for the user NWS or another user as appropriate. When this user signs on, the initial screen will provide access to the *DYNMAIN*. From there, all necessary dynamic menu setup options may be executed. If you are unsure how to access *DYNMAIN*, contact your Customer Support Representative for assistance.

Dynamic Menu Setup

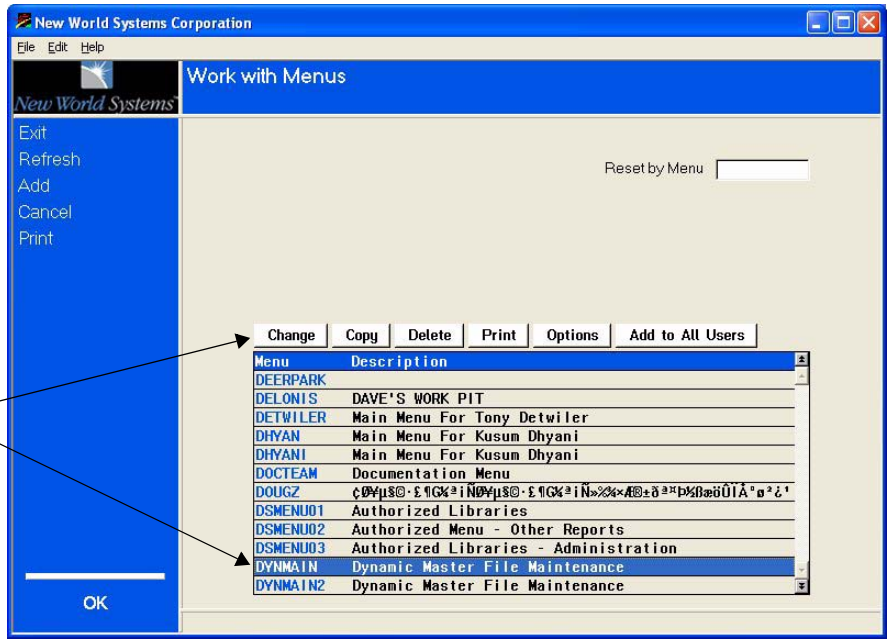
The *DYNMAIN* options that were in use prior to **Logos PTF 6.011** and **Aegis PTF 7.05** have been redesigned to comply with New World's standard "Work-with" process. To use your new *DYNMAIN*, follow these one-time setup instructions:

Edit Library List

1. On the command line of your current *DYNMAIN*, type **EDTLIBL**.
2. Click **OK**. The *Edit Library List* screen will be displayed, showing the list of your current libraries.
3. You will need to place the latest PTF library at the top of the list. Press **<Tab>** to move the cursor to the ***Library*** field to the right of ***Sequence Number* 0**.
4. If you are a Logos customer, type **NWSPAPTF** in the field. If you are an Aegis customer, type **NWSPSPTF**.

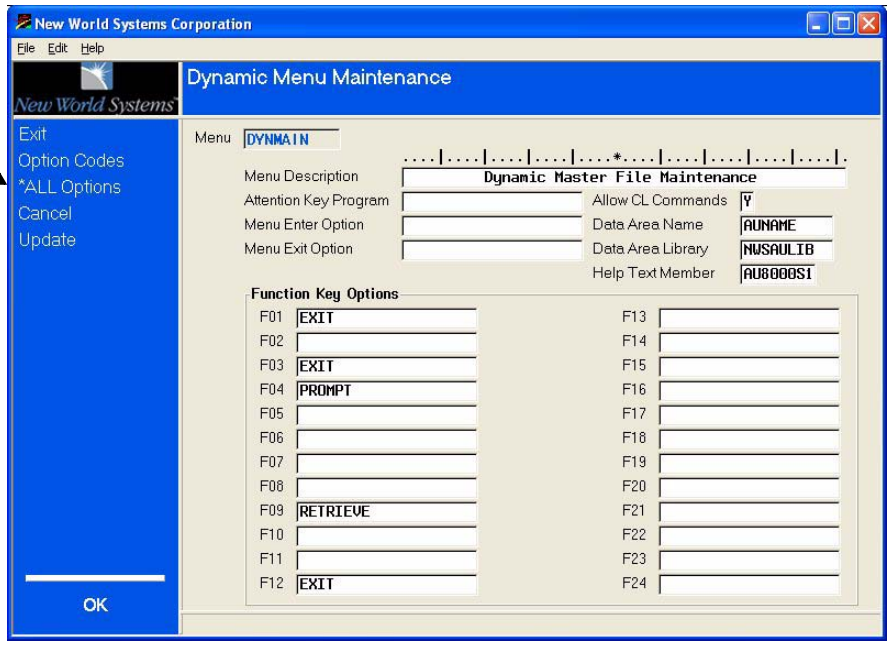
5. Click **OK**. The list will shift downward, moving the PTF library to ***Sequence Number* 10**, the top position.
6. Click **OK**. The *DYNMAIN* will be re-displayed.
7. Type a **1** on the command line to select the *Menu Master File Maintenance* option.
8. Click **OK**. The *Work with Menus* screen will be displayed:

Select **DYNMAIN**, and click **Change**.



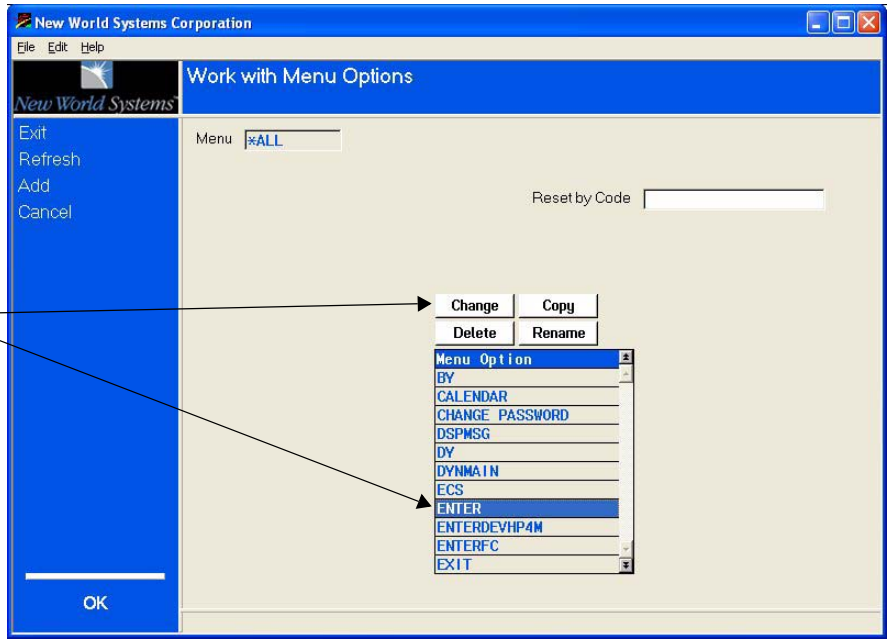
9. Select the **DYMAIN** row.
10. Click **Change**. The *Dynamic Menu Maintenance* screen will be displayed:

Click ***ALL Options** to work with *DYNMAIN* options.



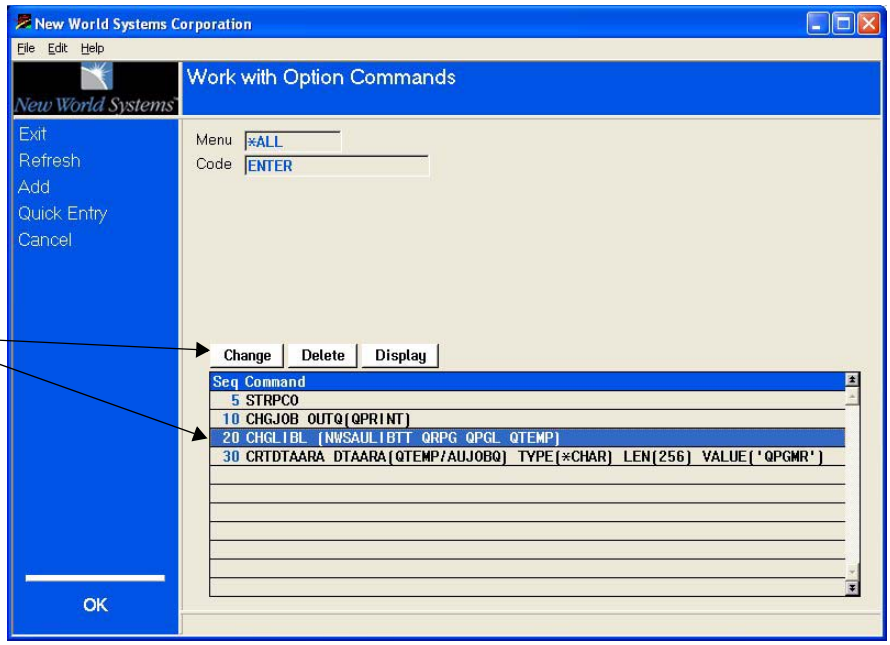
11. Click ***ALL Options**. The *Work with Menu Options* screen for the *DYNMAIN* will be displayed:

Select **ENTER**, and click **Change**.



12. Select **ENTER**.

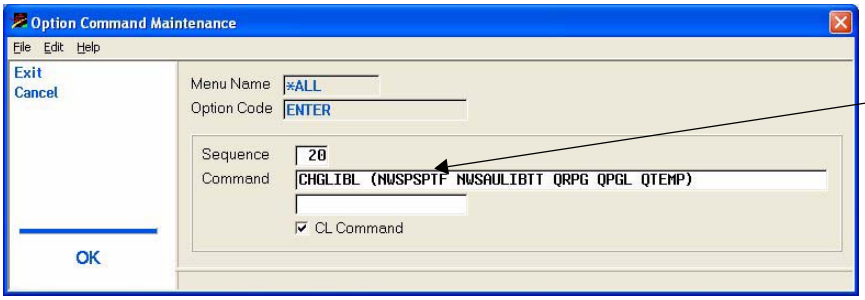
13. Click **Change**. The *Work with Option Commands* screen will be displayed:



Select **CHGLIBL** command, and click **Change**.

14. Select the command line that begins with **CHGLIBL**.

15. Click **Change**. The *Option Command Maintenance* window for that command will be displayed:

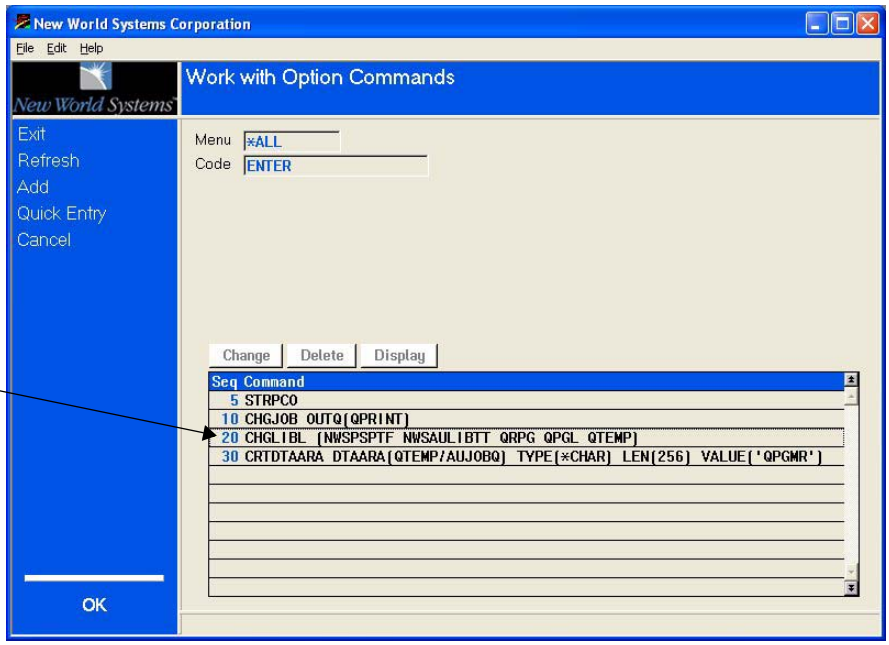


If Logos, insert **NWSPAPTF** as first library in parentheses; if Aegis, insert **NWSPSPTF**.

16. In the ***Command*** field, if you are a Logos customer, insert **NWSPAPTF** as the first library in the parentheses. If you are an Aegis customer, insert **NWSPSPTF**.

17. Click **OK**. The *Work with Option Commands* screen will be re-displayed, showing the new CHGLIBL command:

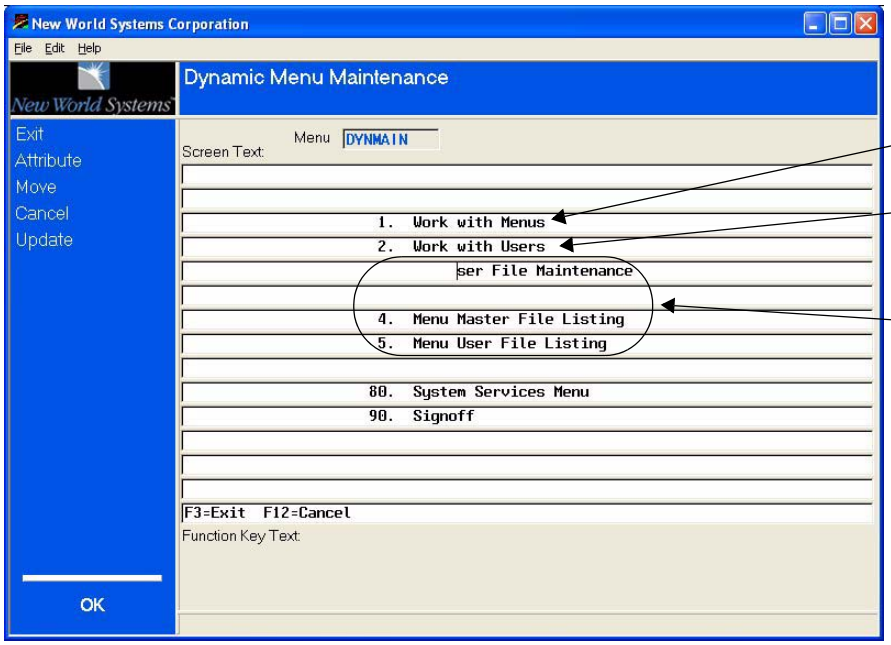
New **CHGLIBL** command.



18. Click **Exit** until you are returned to the *DYNMAIN*.
19. On the command line, type **EDTLIBL**.
20. Click **OK**. The *Edit Library List* screen will be displayed.
21. Make sure the PTF library you just added (**NWSPAPTF** or **NWSPSPTF**) appears at the top of the list of libraries.

Edit DYNMAIN Screen

1. On the command line of the *DYNMAIN* screen, type a **1** to select the *Menu Master File Maintenance* option.
2. Click **OK**. The *Work with Menus* screen will be displayed.
3. Select the *DYNMAIN* row.
4. Click **OK**. The *Dynamic Menu Maintenance* screen will be displayed.
5. Click **OK**. A second *Dynamic Menu Maintenance* screen will display the *DYNMAIN* in edit mode:

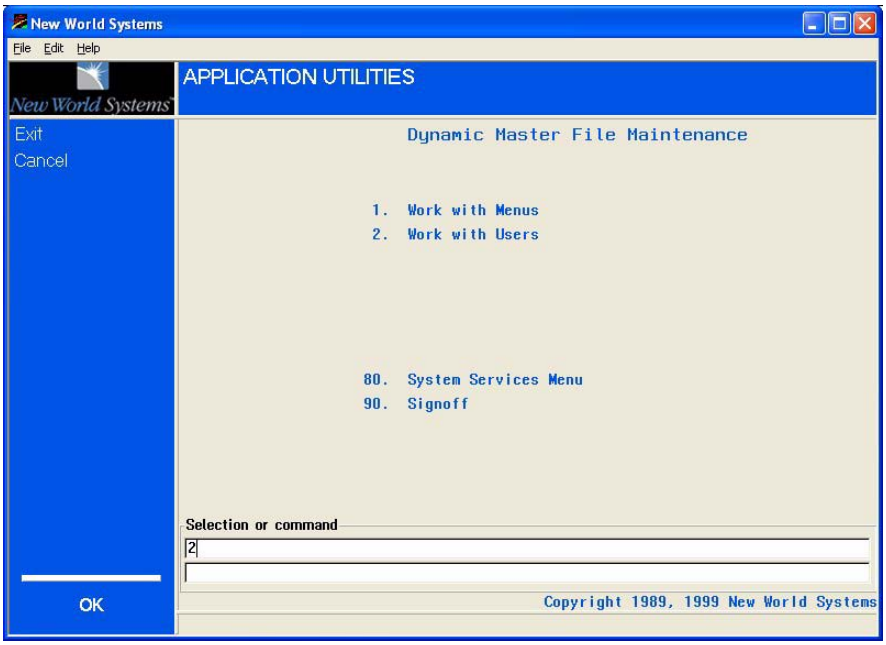


6. Change option **1** from *Menu Master File Maintenance* to *Work with Menus*.
7. Change option **2** to *Work with Users*.
8. Delete options **3**, **4** and **5**.

NOTE

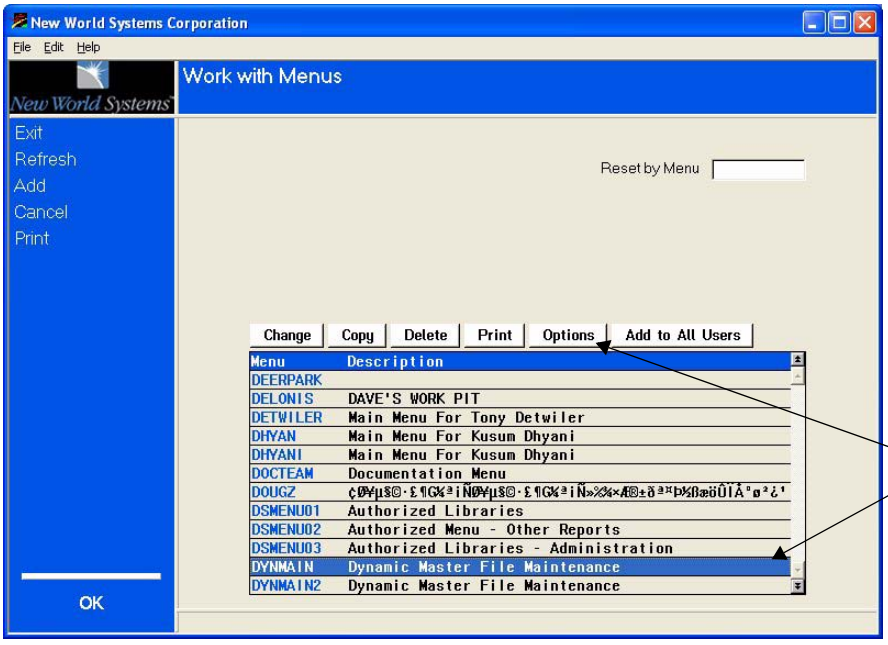
*If you want to move text from one location to another, click the **Move** button (**F10**). Place an **M** before and after the text to be moved, place an **A** at the new location, and click **OK**.*

9. After making your changes, click the **Update** button (**F20**) to save them.
10. Click **Exit** to return to the edited *DYNMAIN*, where the new options will be displayed**:**



Set up DYNMAIN Option 2, *Work with Users*

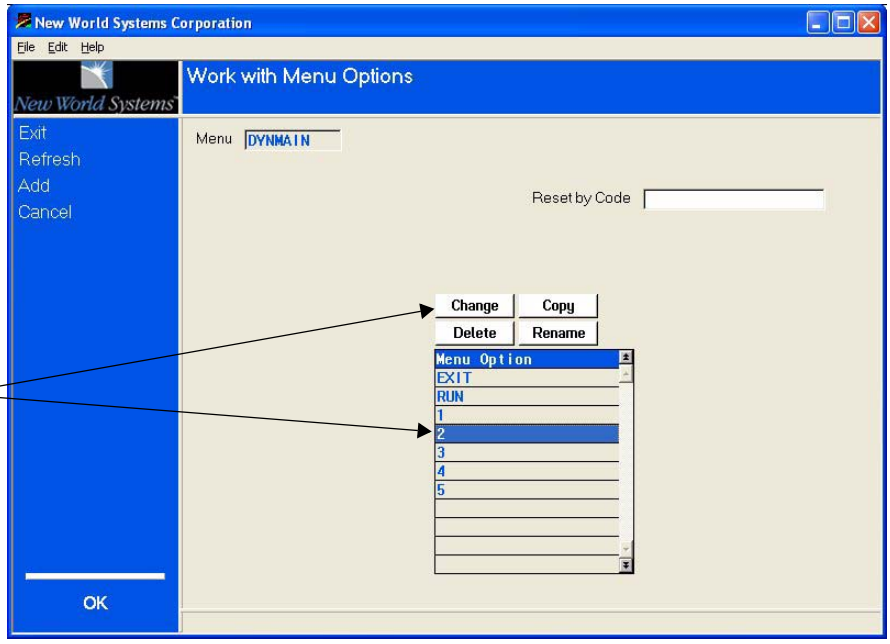
1. Option **1**, *Work with Menus*, will be ready for use; however, option **2**, *Work with Users*, will need to be "pointed" to the correct programs. On the command line of the *DYNMAIN* screen, type a **2** to select the *Work with Users* option, and click **OK**. The *Work with Menus* screen will be displayed:



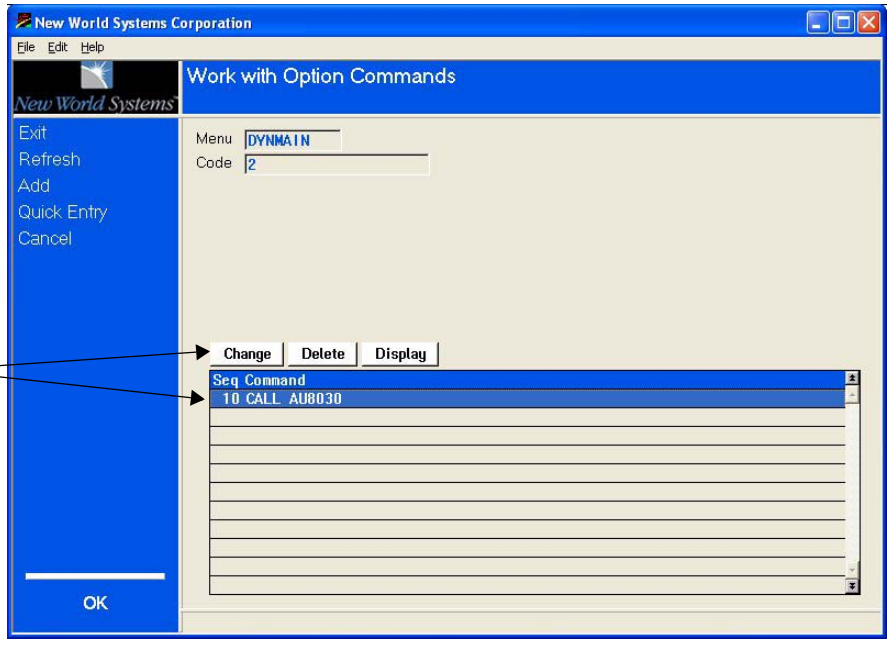
Select **DYNMAIN** row, and click **Options**.

2. Select the **DYNMAIN** row.

3. Click **Options**. The *Work with Menu Options* screen will be displayed:

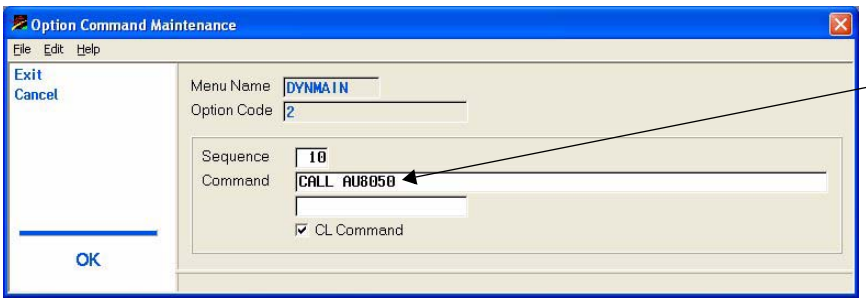


4. Select Menu Option **2**.
5. Click **Change**. The *Work with Option Commands* screen will be displayed:

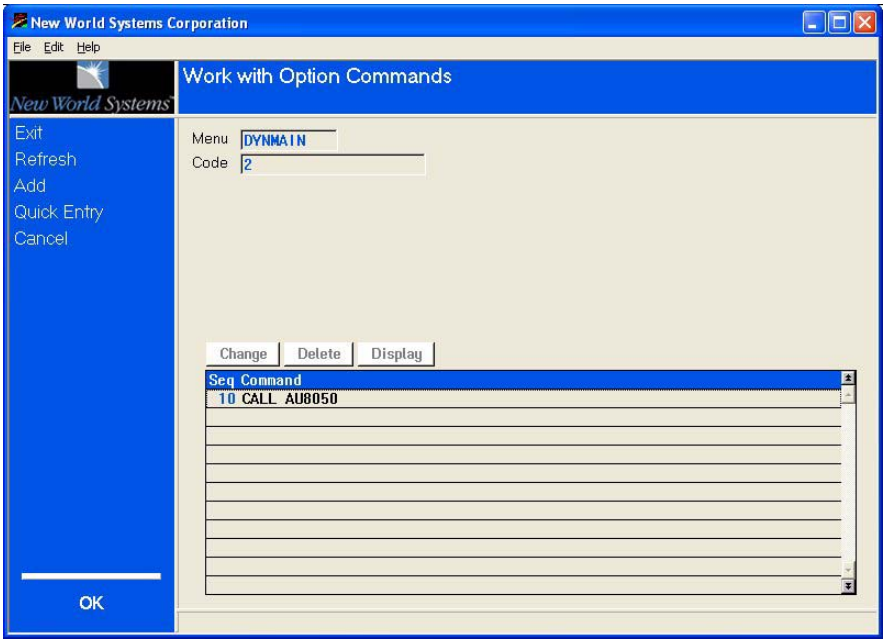


6. Select the **CALL AU8030** Command.

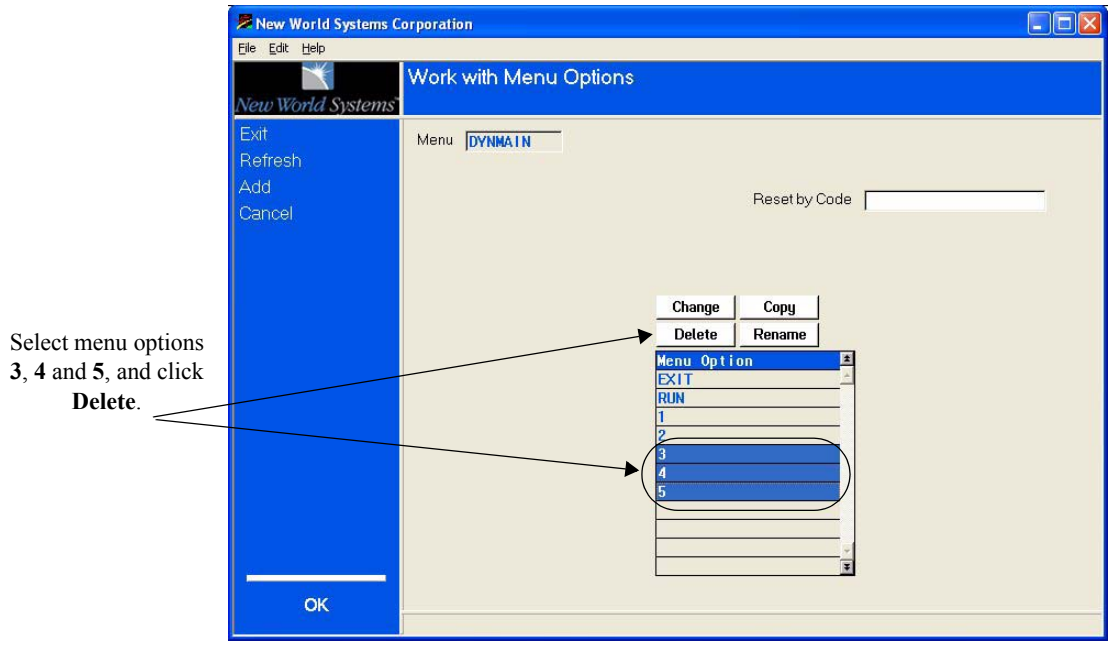
7. Click **Change**. The *Option Command Maintenance* window for that command will be displayed:



8. In the ***Command*** field, change **CALL AU8030** to **CALL AU8050**.
9. Click **OK**. *Work with Option Commands* will be re-displayed, showing the changed command:

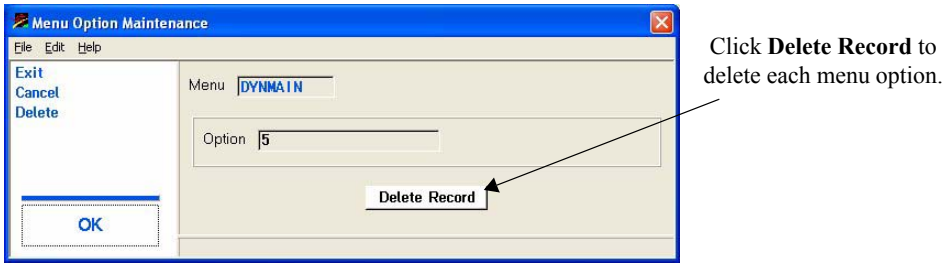


10. Click **Exit** to return to *Work with Menu Options*:



11. Hold down the **Ctrl** key, and select menu options ***3***, ***4*** and ***5*** (so that each option is highlighted).

12. Click **OK**. Before each option is deleted, a delete confirmation window will be displayed:



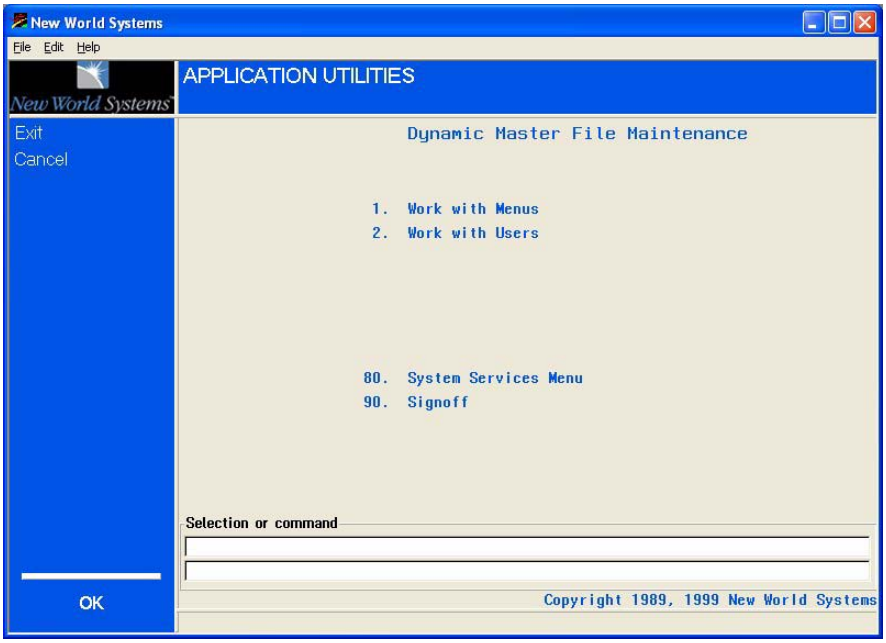
13. Click **Delete Record** to delete each option. After you have deleted the menu options, the only options displayed should be ***EXIT, RUN***, ***1*** and ***2***.

14. Click **Exit** until you return to the *DYNMAIN*. Option **2** will be ready for use. When you select it, the *Work with Users* screen will be displayed.

NOTE

All of the Dynamic Menu screens may be reached through options 1 and 2 of the DYNMAIN. The following pages will proceed in order through each pertinent screen, telling you how to access it and outlining its functionality.

Dynamic Menu Options



1. Work with Menus

Use the *Work with Menus* option to create menus, define the option codes for menus and generate listings of the text and option codes for individual menus or all menus. Option codes must be defined before they can be associated with a menu. To aid in the process of setting up a new menu, you also may copy an existing menu and make appropriate modifications.

2. Work with Users

Use the *Work with Users* option to select the menus a user may access, to select the user's initial menu and to produce a listing of all the menus associated with a particular user or all users and their associated menus. The menus must be defined before you use this option.

80. System Services Menu

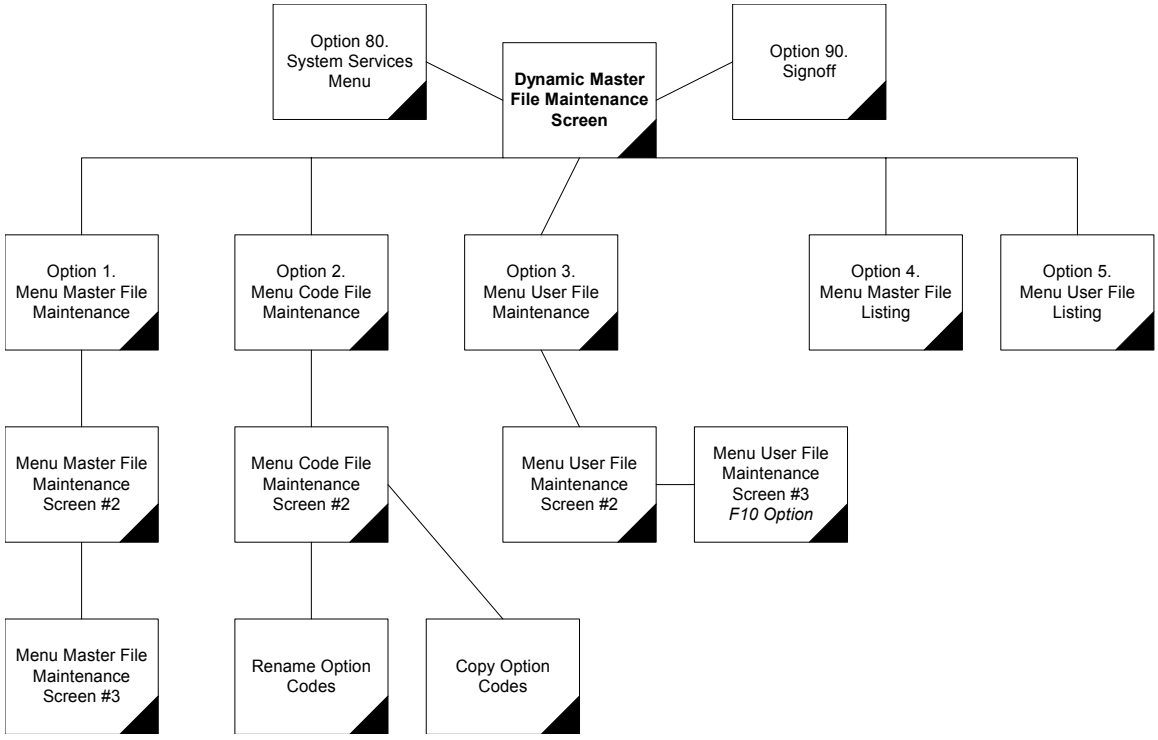
Use the *System Services Menu* to work with your jobs and outputs. (Consult your IBM iSeries 400 documentation for further instruction regarding the use of this option.)

90. Signoff

Use the *Signoff* option to end your iSeries 400 session and return to the sign-on screen.

Dynamic Menu Screens Flowchart

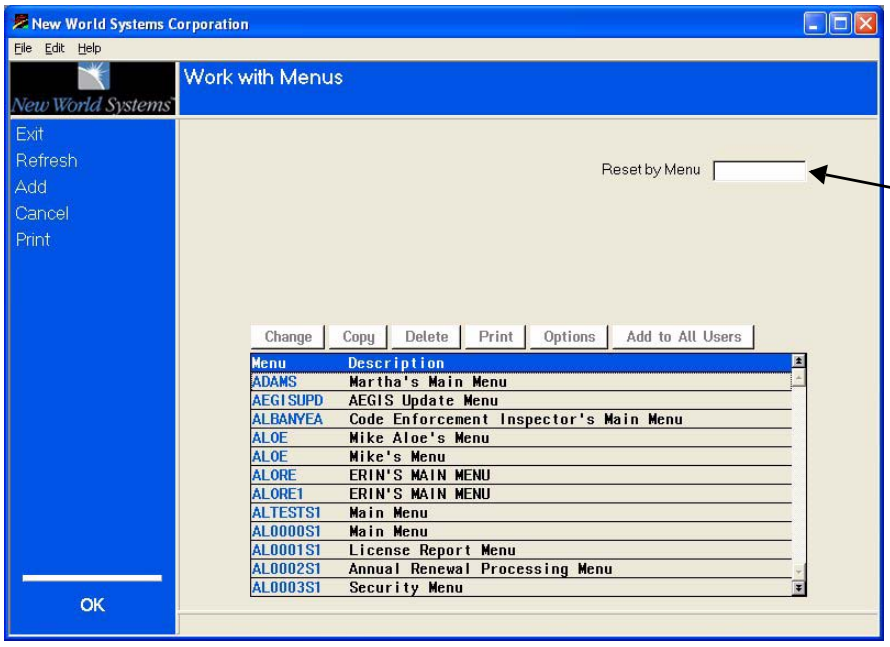
Below is a flowchart showing the relationship of all Dynamic Menu screens:



Work with Menus

Use the *Work with Menus* option to create a menu and define its characteristics, including the text to be displayed, **Enter** and **Exit** option codes, the **Attention Key** program, function keys and the data area control parameters. Also use this option to determine whether Command Language (CL) commands will be permitted from the menu and to print the *Menu Master File Listing*.

To access the *Work with Menus* screen, select *Work with Menus* from the *Dynamic Master File Maintenance* menu:



To move a particular menu to the top of the list, type the menu name in this field, and click **OK**.

When creating a new menu, click **Add** (**F6**) to display the *Menu Maintenance* window in the lower right corner of this screen, type the name of the new menu in the ***Menu*** field, and click **OK**. If you want, you may use the **Copy** (**3**) button to copy a previously defined menu as a base and make the necessary changes. Type the name of the menu to be copied in the (Copy to) ***Menu*** field. To copy the options associated with that menu, select (**Y**) the ***Copy Options*** field.

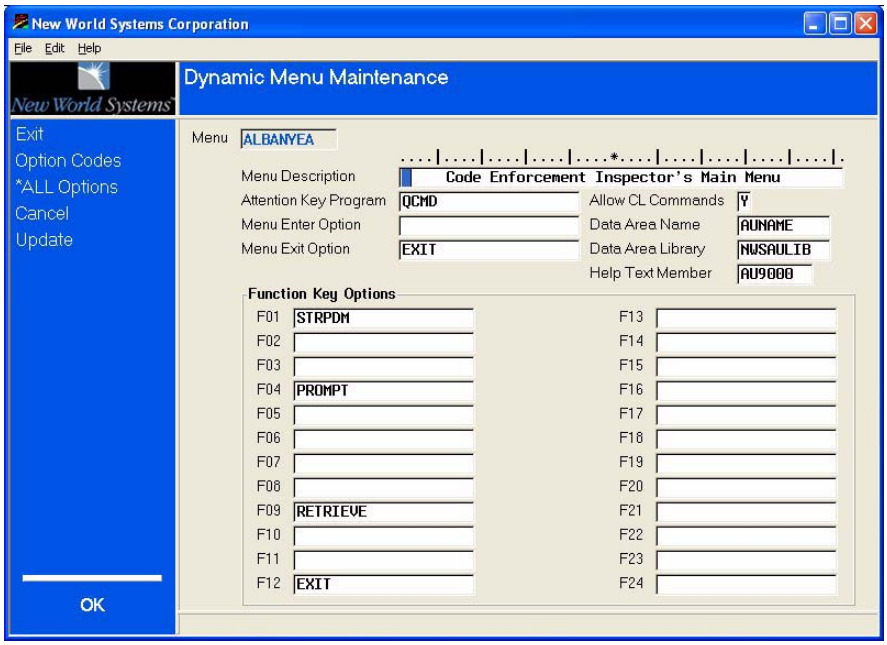
Click **OK**. The options on the menu named in the (Copy to) Menu field will be copied to the new menu.

If the menu you want is part of a long list and does not appear on the screen, use the **<Page Down>** key or the ***Reset by Menu*** field to find it. To use the Reset by Menu field, type the name of the menu in the field, and click **OK**. The list will be reset so that the new menu appears at the top.

After making your entries, click **OK** to go to the first *Dynamic Menu Maintenance* screen, where you may modify the contents of the menu, if necessary.

Dynamic Menu Maintenance, Screen 1

Use this screen to associate option codes with the menu specified:



All of the functions and fields listed below are defined on this screen:

- Menu Description
- Attention Key Program
- Menu Enter Option
- Menu Exit Option
- Allow CL Commands
- Data Area Name
- Data Area Library
- Help Text Member
- Command Key Options

Use the ***Menu Description*** field to create a title for your menu. *Dynamic Master File Maintenance* is an example of a menu title. Although there are no constraints on what may be entered here (it may be left blank), the entry in this field typically is a short phrase describing the contents or functionality of the screen. Examples may be "Detective Menu" and "John O'Conner's Main Menu." Use the scale above the description line to center the title. The asterisk (*) marks the center of the title as it will appear on the menu it represents. Once you have typed the title, use the **Insert**, **Space** and **Delete** keys to center it.

Most IBM keyboards have an **Attn** (Attention) key in the upper left corner. It may or may not be combined with the letters ***SysRq***, or instead of Attn, it may say **Esc**. The Attention key gives the user of this menu access to simple iSeries 400 tasks, such as managing printed output, send-

ing messages and changing passwords. Use the ***Attention Key Program*** field to define what will occur when the Attention key is pressed. This field is not a menu code field, so you should not enter a menu code; instead, enter the program to be run. Possible entries in this field are as follows:

- **QEZMAIN**: This entry will take the user to IBM's Operational Assistant, a good, safe program to put on menus for data-entry users who do not have IBM command line authority. This program should appear on most of the menus you create.
- **QUSCMDLN** or **QCMD**: These programs will call an IBM command line on which any IBM function may be performed. These programs should be put into the menus of those who are considered system administrators and have command line authority. Special care must be taken to prevent end-users from accessing menus with this authority.

The ***Menu Enter Option*** is a user-created function that is executed when users bring the menu onto their screens. The enter option may be used to define where user output is sent, add or remove extra libraries from a user's library list or automatically display user messages to the user. When first creating menus, simply type the word "Enter" into this field.

Designed as a sort of Enter Option in reverse, the ***Menu Exit Option*** is a user-created function that is executed when a user selects a menu option and thus "exits" the menu; however, experience indicates that an exit option provides little use and, indeed, using it without a full understanding of its functionality can negatively affect the performance of the software; therefore, we strongly recommend that you leave this field blank.

At the bottom of any dynamic menu, you will find a command line identical to an IBM command line. The ***Allow CL Commands*** field lets you determine whether IBM Command Language (CL commands) may be executed from each dynamic menu, or whether a menu should be limited to the execution of menu codes only. Because CL commands may be used to clear and delete files, delete programs and perform other operations that may produce unwanted results, most user menus will not include this capability. Use of CL commands usually is limited to security officers and system programmers. Select (**`Y`**) the Allow CL Commands field to allow the command line to accept IBM CL commands.

Type "AUNAME" in the ***Data Area Name*** field.

Type "NWSAULIB" in the ***Data Area Library*** field.

Use the ***Help Text Member*** field to name the member that contains the help text. This member resides in source file AUTXTSRC, which resides in library NWSAULIB. Type "AU8000S1" in the Help Text Member field.

Use the ***Function Key Options*** fields to describe how function keys will be used on the menu. You may define a function key to do anything that a menu option does. Function key descriptions will be displayed on the left side of the menu. (On a traditional iSeries 400 menu, function keys will be displayed on the bottom of the menu.)

When a function key is pressed, the corresponding menu code, defined through the *Menu Code Maintenance* option, will be executed. Function keys will work only when the user is viewing the menu screen for which they have been defined.

When first creating menus, type the word *EXIT* in the ***F03*** field.

If the text for a function key appears on a menu but the function key is not defined for that menu, nothing will happen when you press the function key. Also, a function key that is defined through Menu Master File Maintenance does not have to appear in the text for that menu; it may

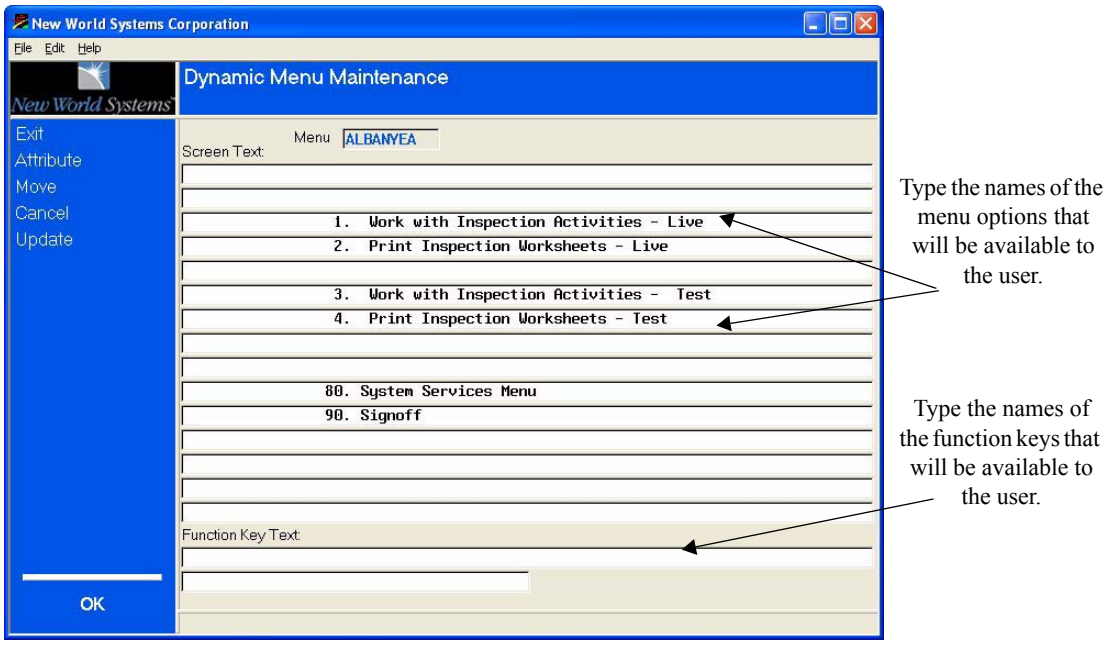
be "hidden," so that a user would not have to see the text to use the function key. (For information on how the text for a function key is defined for a menu, see the "Menu Code Maintenance" section in this chapter.)

The **Option Codes** button (**F7**) on the first *Dynamic Menu Maintenance* screen will take you to the *Work with Menu Options* screen, where you may add, change and delete menu codes.

Dynamic Menu Maintenance, Screen 2

Part of setting up a menu includes composing the actual text that appears on the screen when the menu is displayed. Typically, this text will be a list of the available options and function keys for the menu.

Use screen 2 of *Dynamic Menu Maintenance* to enter the menu screen text and function key text. This text is displayed to the user as the menu. The options displayed here should correspond to the option codes previously defined for this menu or for all menus:



In the ***Screen Text*** area, type the names of the options that will be available to the user on this menu. In the ***Function Key Text*** area, type the names of the buttons (function keys) that will be available.

The options may be positioned on the screen in any manner desired (left justified, centered, etc.). Their positioning will not affect the way the menu operates.

NOTE

The appearance of an option in the text of a menu does not ensure the option can be executed from that menu.

If you want to assign special attributes to set off or emphasize strings of text, click **Attribute (F6).** Below the menu title, "*** Attribute Mode ***" will be displayed. You may set the color of a string of text, display it in reverse image, underscore it and make it blink.

The following attribute characters are available:

Character	Appearance
g	Green
G	Green / Reverse Image
h	Green / Underscore
H	Green / Underscore / Reverse Image
w	White
W	White / Reverse Image
x	White / Underscore
r	Red
R	Red / Reverse Image
k	Red / Blink
K	Red / Reverse Image / Blink
s	Red / Underscore
S	Red / Underscore / Reverse Image
J	Red / Underscore / Blink
t	Turquoise
T	Turquoise / Reverse Image
u	Turquoise / Underscore
U	Turquoise / Underscore / Reverse Image
y	Yellow
Y	Yellow / Reverse Image
z	Yellow / Underscore
p	Pink
P	Pink / Reverse Image
q	Pink / Underscore
Q	Pink / Underscore / Reverse Image
b	Blue
B	Blue / Reverse Image

To change an attribute, type the appropriate attribute character in the space directly in front of the first character of the string of text you want to change, and click **OK**. This action will end Attribute Mode, and the attribute you added will be applied to the text.

To change the appearance of multiple strings of text at the same time, type the appropriate attribute character in front of each string of text you want to change, and click **OK**.

When you change an attribute, a hidden character is added to the menu. If you want to remove an attribute, click Attribute (F6), place the cursor on this character, and press the **Space Bar**. This action will replace the character with a blank, removing the attribute.

To move text from one location to another, click the **Move** button (**F10**). Place an *M* before and after the text to be moved, place an *A* at the new location, and click **OK**.

To save the current menu screen text and function key text, click **Update** (**F20**).

Menu Code Maintenance

The basic building block in Dynamic Menu Processing is the option code. An option code is an instruction or list of instructions that are executed every time a menu option or function key is selected; for example, an option code may change the job queue a particular application will use. An option code may include CL commands, calls to application programs or menus and calls to other dynamic menus.

Work with Menu Options lets you specify exactly what should occur when each option is selected from a menu. If an option appears in the text for a menu but is not defined for that menu, nothing will happen.

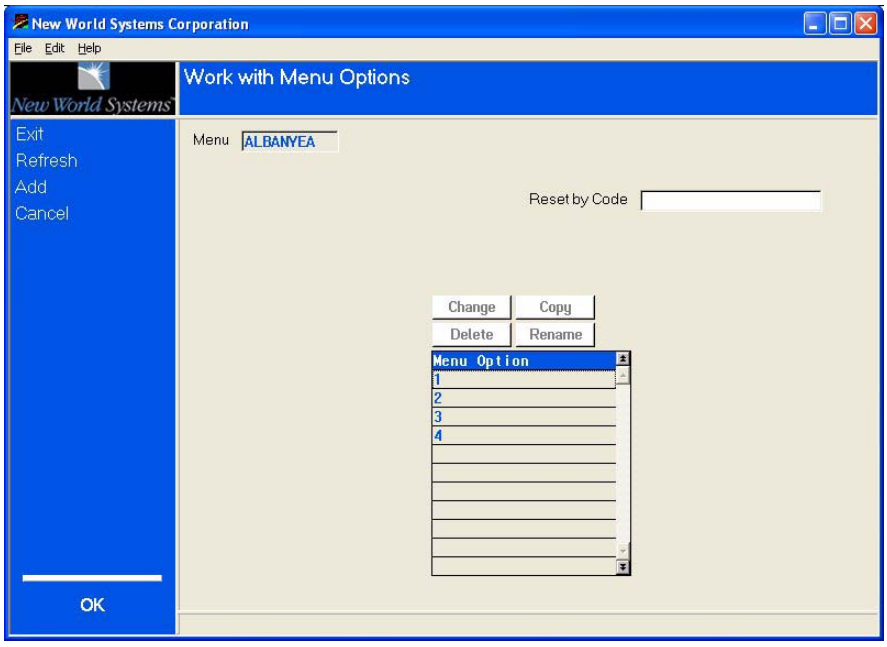
You may associate a menu code with a dynamic menu in three ways:

1. As a valid option entered from a dynamic menu. Each option typically will be numbered to correspond with what is entered from a dynamic menu to execute the menu code.
2. As an **Enter** or **Exit** option for a menu. If specified as an Enter option, it will be executed just prior to the display of the dynamic menu. If specified as an Exit option, it will be executed when a dynamic menu is exited.
3. As one of the function keys for that menu. You may specify a separate menu code for each of the 24 function keys. When a function key is pressed from the menu, the associated menu code will be executed.

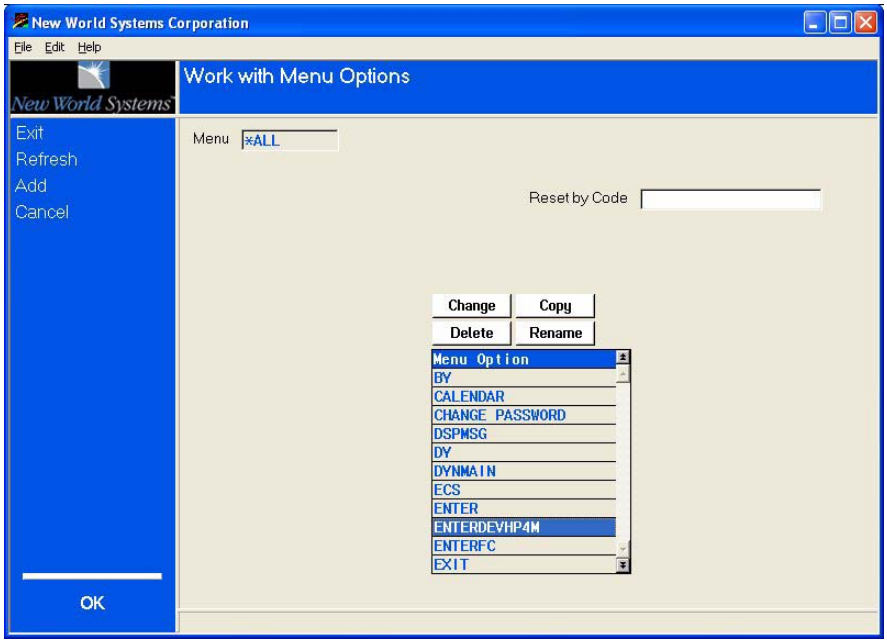
An option defined through *Work with Menu Options* does not have to appear in the text for that menu; it may be "hidden." A user would not see the option but could use it.

Work with Menu Options

To access the *Work with Menu Options* screen, go to *Work with Menus*, select the menu you want, and click **Options**. You also may click **Option Codes** (**F7**) on the first *Dynamic Menu Maintenance* screen:



Use this screen to name a new option code for the menu selected or to change, copy, delete or rename an existing option code. To process an option code for all menus, so that any user may access the code from any menu, click ***ALL Options** (**F8**) from the first *Dynamic Menu Maintenance* screen for the menu selected:

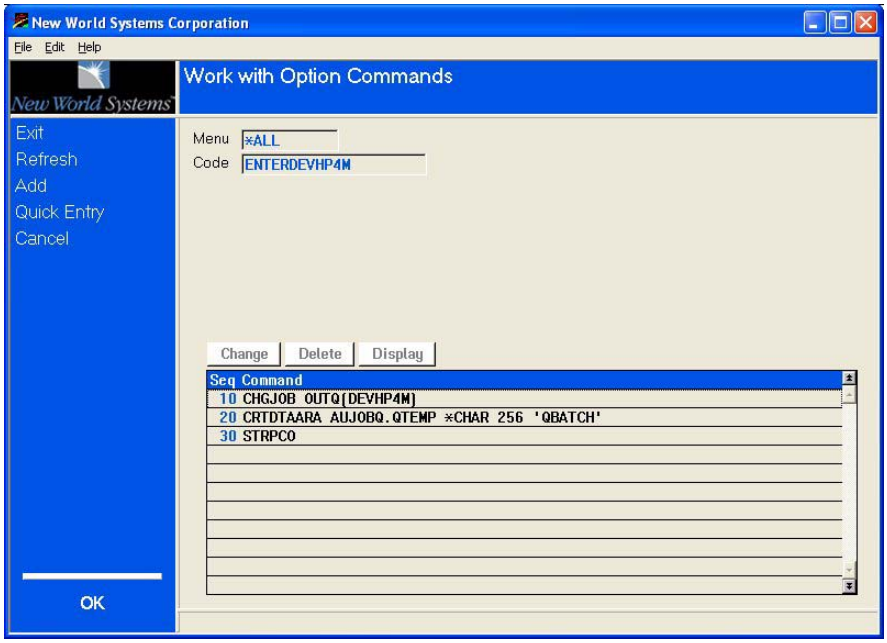


From this screen, you may add, change, copy, rename and delete option codes for the menu specified. The current options for the menu are displayed on the left side of the screen.

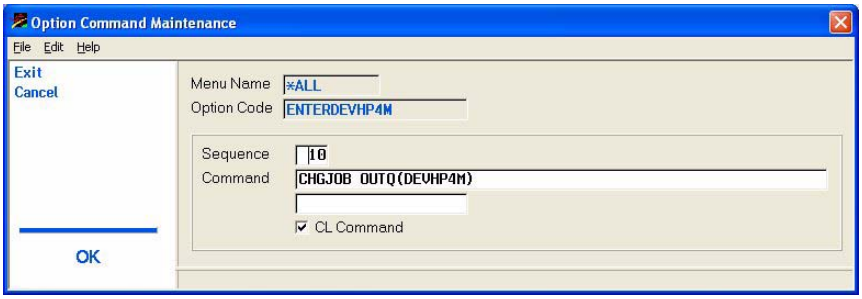
To add an option code, click **Add** (**F6**)**.** The *Menu Option Maintenance* window will be displayed in the lower right corner. In the ***Option*** field, type the name of the option code, and click **OK.** The entry will be saved and the field cleared so that you may enter another code, if necessary. Each time you enter a code, the field will be cleared. When you click **Exit** (**F3**) or **Cancel** (**F12**), all of the codes you have named will be listed on the *Work with Menu Options* screen.

Option Command Maintenance

To enter the actual commands that will determine what happens when an option is selected from the menu, select the option code on the *Work with Menu Options* screen, and click **Change** (**2**). The *Work with Option Commands* screen will be displayed:



This screen contains the commands associated with an option code. To add a command, click **Add** (**F6**). To change a command, select it (**2**), and click **Change** (**Enter**). The *Option Command Maintenance* window will be displayed:



Each command consists of a ***Sequence*** (***Seq***) number, the ***Command*** itself and a check box (Yes/No flag) that tells whether the command is a ***CL Command***.

The sequence number acts like a line number in a program. Commands for an option code are executed in ascending, numerical order. Leave a large enough interval between sequence numbers to allow additional commands to be added later. Each option code may contain a maximum of 999 commands.

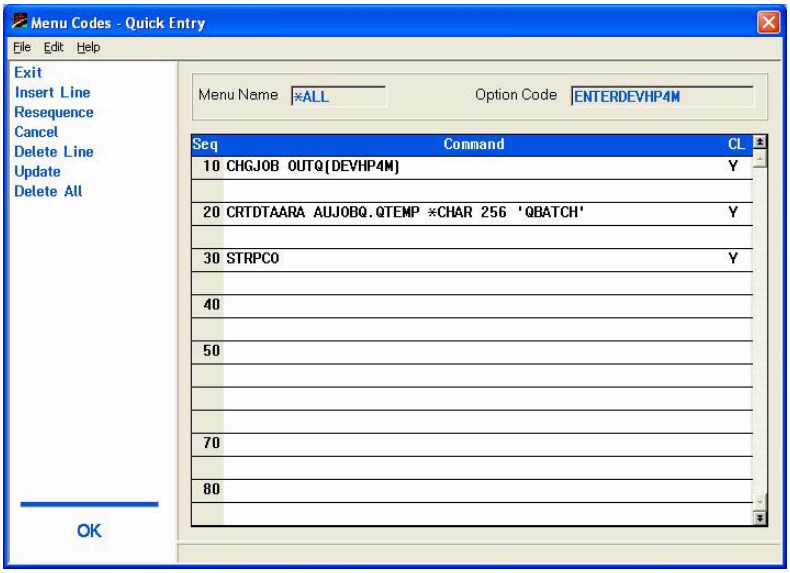
The command text itself may be a CL command, another menu name or a blank line. If the command entered is a CL command, the CL Command box must be checked (**Y**), so that the syntax and required parameters of the command will be validated; for example, to create a CL command that will change the current job queue, do the following:

1. From the *Work with Option Commands* screen, click **Add** (**F6**). The *Option Command Maintenance* window will be displayed.
2. Select an appropriate sequence number in the ***Sequence*** field.
3. In the ***Command*** field, enter **`CHGDTAARA (AUJOBQ (1 10) VALUE('<jobq>')`**, where <jobq> is the name of the new job queue. The name of the job queue may contain 10 characters.
4. Check (**Y**) the ***CL Command*** box.
5. Click **OK**.

If the command is entered incorrectly, an error message will be displayed when the option is selected from the menu.

Quick Entry

If you want to add multiple commands to an existing series of commands, you may want to use the **Quick Entry** (**F8**) button from the *Work with Option Commands* screen*:*



The *Quick Entry* window works the same as an *Option Command Maintenance* window, except that it lets you edit the complete series of existing commands on the same window and provides blank command lines for additional commands.

If necessary, use the **<Page Up>/<Page Down>** keys to roll through the commands listed.

When you are finished entering commands, click **Update** (**F20**) to update the option code.

Copy Option Code

To copy an option code from one menu to another, go to *Work with Menu Options*, select (**3**) the option code you want to copy, and click **Copy** (**Enter**). The following window will be displayed:



In the (**Copy To**) ***Menu*** field, type the name of the menu (or **All* if all menus) to which the new option code is to be attached. In the (**Copy To**) ***Option*** field, type the name of the option code that will be created with the same characteristics as the option code in the (**Copy From**) ***Option*** field.

The dynamic menu to which the new menu code will be copied will default to the same dynamic menu that contains the code being copied; you may, however, specify another dynamic menu, attaching the newly created menu code to it.

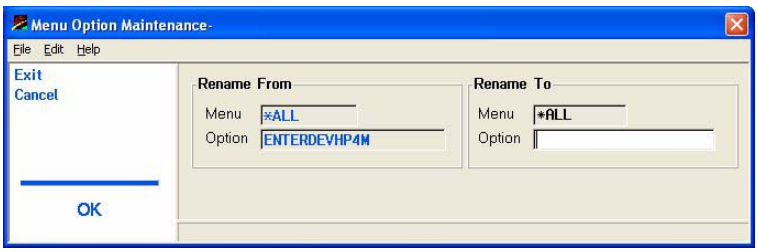
NOTE

*The **Copy** option will create a new option code, leaving the option code that was copied unchanged.*

Rename Option Code

When renaming an option code, you may preserve its association with the current dynamic menu, or you may associate it with another dynamic menu.

To rename an option code already attached to a menu, select it (**7**), and click **Rename** (**Enter**). The following window will be displayed:

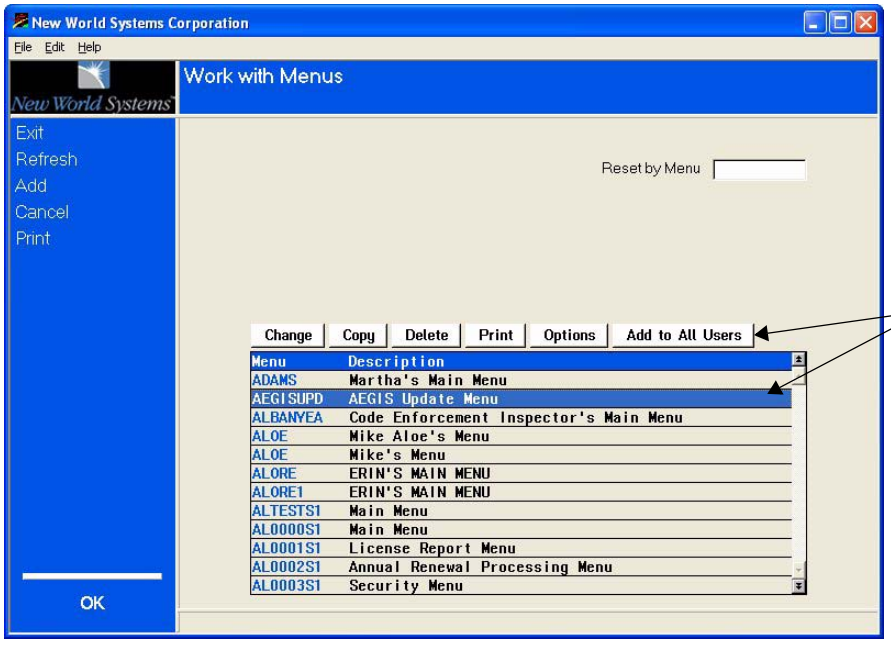


In the (**Rename To**) ***Menu*** field, name the menu to which the new code is to be attached. Type a valid code in the (**Rename To**) ***Option*** field. This code will replace the (**Rename From**) ***Option*** that is displayed.

NOTE

*The **Rename** option will not create a new option code; it only will change the name of the option code selected.*

Dynamic Menu Mass Add



To add a menu to all users, select the menu, and click **Add to All Users**.

If you want to add a dynamic menu to all users, go to *Work with Menus*, select the menu you want to add, and click the **Add to All Users** button. The message "Menu added to all Users" will be displayed at the bottom of the screen. No further actions are required.

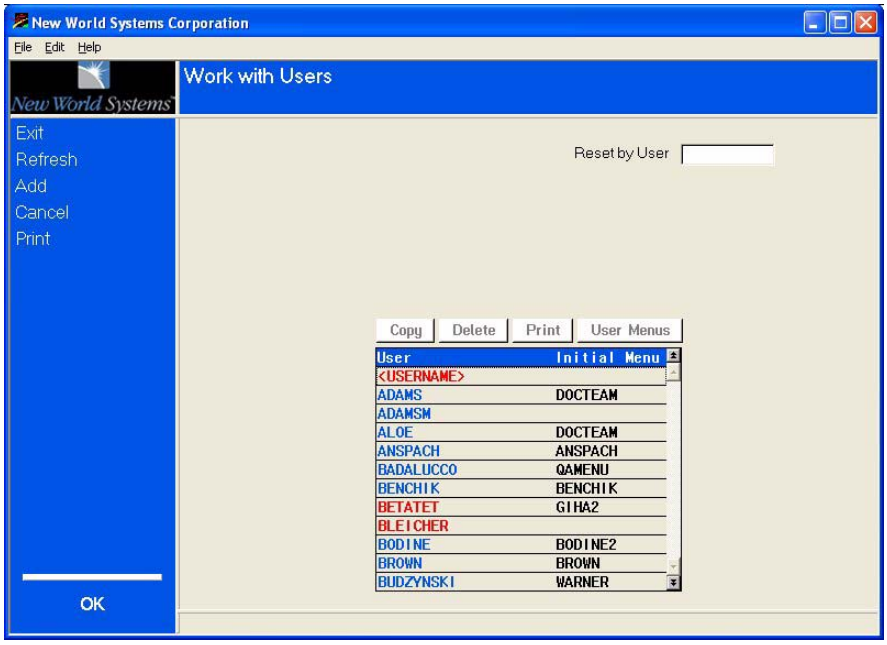
NOTE

Add authority for program AU8130, User Menu Maintenance, must be assigned to any user who is to use this option.

Work with Users

The *Work with Users* option lets you grant access to dynamic menus by individual user. Each user will be granted access only to the menu(s) you specify here. You also may specify the initial menu displayed when a user signs on.

To access the *Work with Users* screen, select *Work with Users* from the *Dynamic Master File Maintenance* menu:



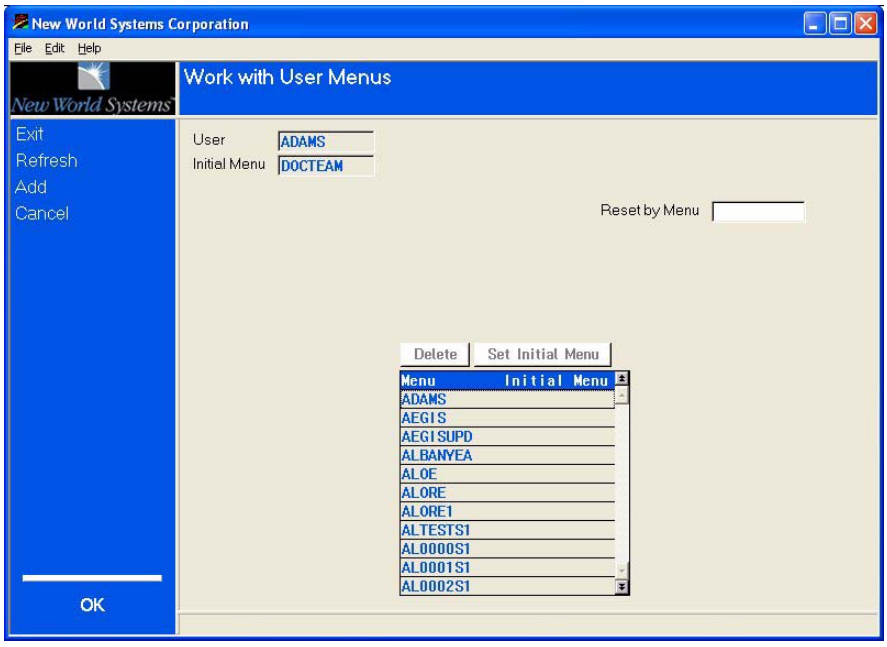
This screen lets you associate menus with users. The menu names will be validated, so they must exist prior to an attempt to associate them with a user ID. Only one menu may be added to a user ID with the ***Initial Menu*** field selected. This menu will be the user's main menu and the first menu displayed when the user signs on.

NOTE

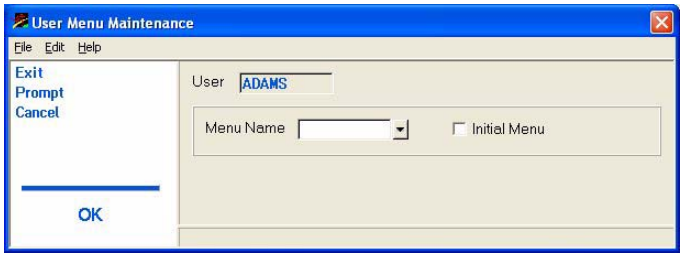
User menus that no longer are valid will be displayed in red.

Work with User Menus

To work with a user's menus, select (**11**) the User from the list on the Work with Users screen, and click **User Menus** (**Enter**). The *Work with User Menus* screen will be displayed:



To add a menu, click **Add** (**F6**).The following window will be displayed in the lower right corner:



In the ***Menu Name*** field, enter the name of the new menu to be associated with the user selected. If it will be the initial menu displayed each time the user signs on, select the ***Initial Menu*** field (**Y**). The default is deselected (**N**). Only one initial menu is permitted, and this condition will be validated. If you try to select an initial menu when one already exists, the Initial Menu field will be highlighted.

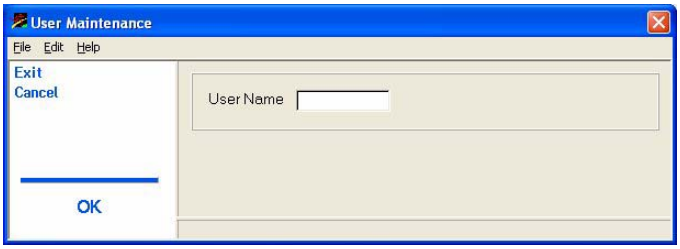
NOTE

It is imperative to select an initial menu that will greet the user when Dynamic Menu Processing begins.

Click **OK**. The menu name will be displayed alphabetically in the list of menus on the Work with User Menus screen. You may have to use the **Page Up/Page Down** keys or the ***Reset to Menu*** field to view the location of the menu in the list.

If an initial menu has been selected, it will be displayed in the **Initial Menu** column. To select a different initial menu, select it (**8**) from the list, and click **Set Initial Menu** (**Enter**). The menu then will be displayed in the **Initial Menu** column.

Another way to add a menu to a user's menu list is to assign the same menu another user has. To add menus in this way, select (**3**) the user from the *Work with Users* screen, and click **Copy** (**Enter**). The following window will be displayed in the lower right corner of the screen

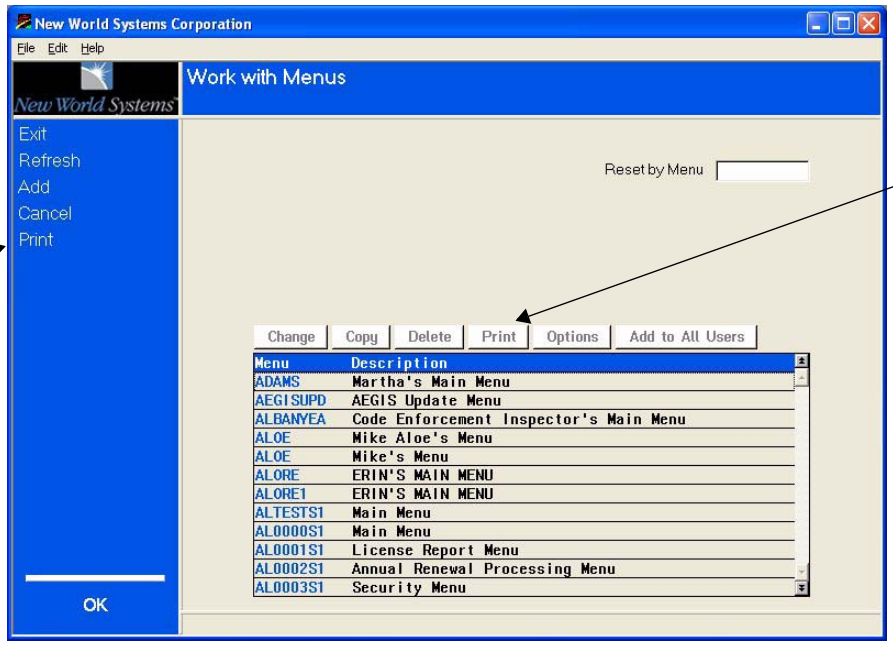


In the ***User Name*** field, type the ID of the user whose menu will be assigned to the selected user, and click **OK**. This action will copy all of the first user's menus to the second user's menu first. **Caution: using this option will not guard against duplicate menu names.**

Menu Master File Listing

The *Menu Master File Listing* is a report of the descriptive information for one or more dynamic menus. This report shows the actual screen layout of a menu, all menu codes, commands defined for menu codes, the program associated with the **Attention** key, menu codes specified for the **Enter** and **Exit** options and menu codes specified for each function key.

To generate a report for a particular menu, select (**6**) the menu on the *Work with Menus* screen, and click the white **Print** button above the list. To generate a report for all menus, click (**F17**) the blue **Print** button to the left of the list:



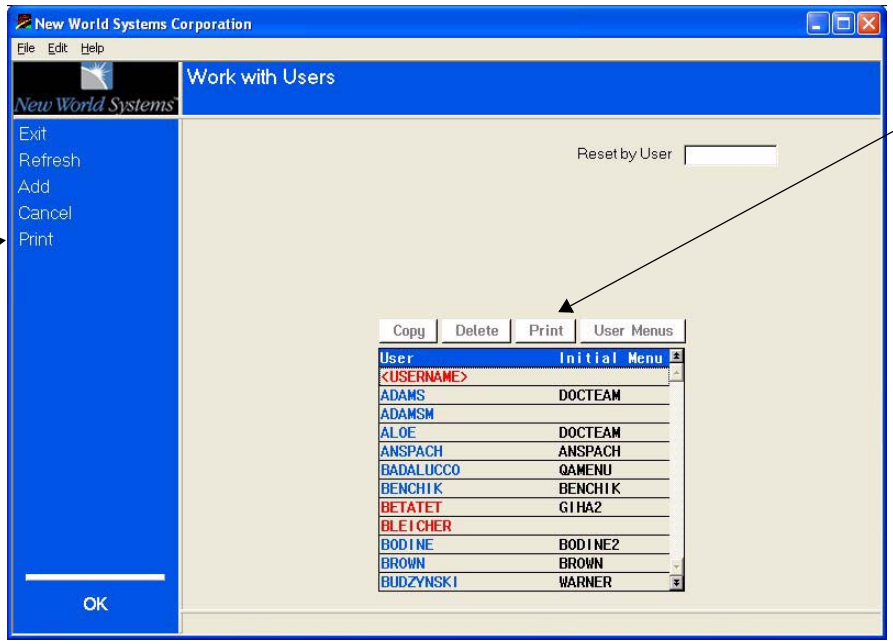
Blue **Print** button generates a report for all menus.

White **Print** button generates a report for a particular menu.

Menu User File Listing

The *Menu User File Listing* is a report of the dynamic menus authorized for a particular user.

To generate a report for a particular user, select (**6**) the User ID on the *Work with Users* menu, and click the white **Print** button above the list. To generate a report for all users, click (**F17**) the blue **Print** button to the left of the list:



Blue **Print** button generates a report for all users.

White **Print** button generates a report for a particular user.

Chapter 4
Work with Tables

All New World Systems software packages make use of table fields. When prompted, these fields provide users with lists of valid entries. In the setup of your software, you will determine the valid entries for table fields. When a user enters information in one of these fields, the system will verify whether it is valid.

NOTE

Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

Table Master Processing

Table Master Processing lets you create a new table, change an existing table or delete an existing table. All tables that a software application uses already will have been set up for you when the software is installed. Each table will have a description, abbreviation and several table entries set up. There should be no need to add, change or delete a table. You have the option to change the descriptions of user-defined tables. Refer to the "User-Defined Table Processing" section of this chapter for details.

Table Entry Processing

Table Entry Processing lets you specify the entries that will be valid for each table. Each entry is a code, often referred to as a **table code** or **table entry**, and may be up to four characters long. The codes you specify as valid entries usually will be created during the setup of your software application. They will not change; however, you may add additional table entries when necessary.

Adding Table Entries During Prompting

If you are using **Program-Level Security Authorization**, you may grant individual users the ability to add a new entry to the list of valid entries while prompting a table field (displaying the list of valid entries for that field). To better manage the creation of new entries for each table, this ability likely will be granted to a limited number of users. A user who is not granted the ability to add new table entries still has the ability to prompt fields for valid entries. (See Chapter 5 for information on authorizing users to add table entries.)

User-Defined Table Processing

Many New World software packages make use of user-defined fields to track additional information when necessary. Each user-defined field is associated with a user-defined table. The wording that will appear on screens and reports for each field will be the abbreviation for the corresponding table. Changing the abbreviation for a user-defined table will change the wording that appears on the screens and reports.

The types of user-defined fields that are used most often are user-defined codes, descriptions, quantities and dates. Each field will be associated with a user-defined table. A user-defined table field will function the same as any other table field. Every entry will be validated against the entries specified for that table. A user-defined table field also may be prompted.

The tables associated with user-defined descriptions, quantities or dates are used only to define the wording that will appear on screens and reports. Table entries are the available options to select to populate a field.

Prompting

Each table field in your New World software application is "promptable," meaning that it may be prompted for a list of all valid entries.

To prompt a table field, click the prompt button to its right, or enter a question mark (**?**) in the field, and press **Enter**. If **F4=Prompt** is displayed at the bottom of the screen, a table field also may be prompted by placing the cursor in the field and pressing function key **F4.** When the list of valid entries is displayed, select the entry you want, and click **OK** or press **Enter**. It will be entered automatically in the table field being prompted.

If the list of valid entries is too long for one screen, use the **Page Down** key to move toward the end of the list and **Page Up** to move toward the beginning. There are a number of other ways to find the code you want:

- Use the **Rsq by** button (**F9**) to sequence the list alphabetically by table code, description or alternate. The sequence of the list is identified by the column that is highlighted in blue. If the list is sequenced by code, that column will be highlighted in blue. If it is sequenced by description, that column will be highlighted, and so on. Each time you click the button, the list will be sequenced by a new column, depending on whether the button is labeled, **Rsq by Code**, **Rsq by Description** or **Rsq by Alternate**.
- Use the ***Reset*** field to go directly to the entry or its general area without having to page up or down multiple times. When the list is sequenced by code, you may reset the list at the desired code; when it is sequenced by description, you may reset the list at the desired description or partial description, and so on.
- Enter a description or partial description in the ***Search*** line at the bottom of the prompt window. Only entries that contain this text will be displayed in the list. To return to the complete list, clear the Search line, and press **Enter**.

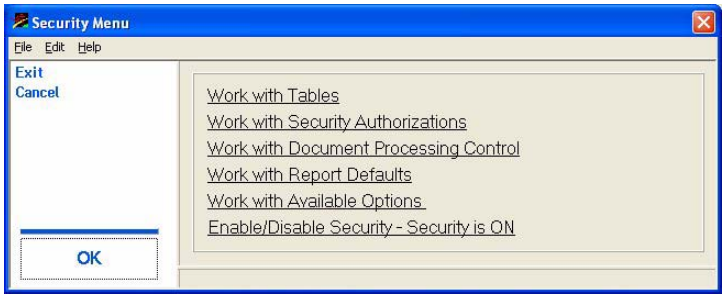
NOTE

If you prompt a field that already contains an entry and decide to exit the prompt without making a selection, the previous entry will be cleared.

Work with Tables

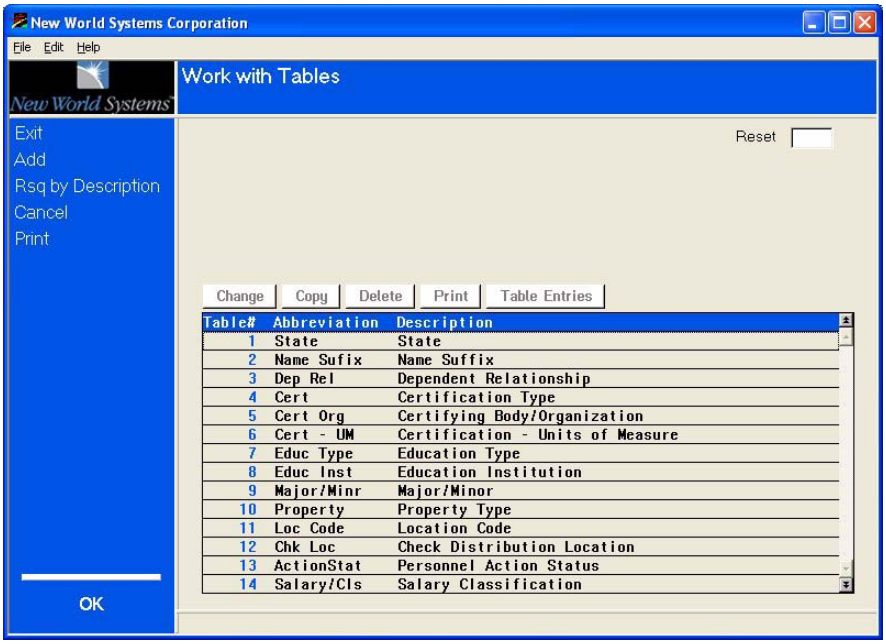
Tables and table code entries are created, changed, copied, deleted and printed through the *Work with Tables* screen. All of the tables used in an application are listed on this screen.

To access this screen, click **Security** from a *System Administrator Menu*. The *Security Menu* will be displayed:



This menu lets you set up and maintain table master information, table codes, program security for each user, document processing, report defaults and available options.

Select *Work with Tables*. The *Work with Tables* screen will be displayed:



To work with a table, select it, and click the button corresponding to the type of work you want to do.

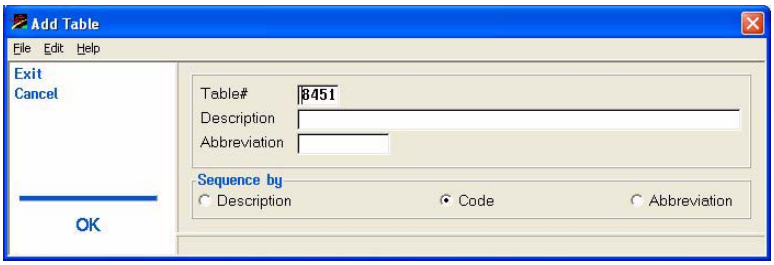
If the list of tables is too long for one screen, there will be a scroll bar to the right of the list. Click the arrows to scroll the list up and down.

You also may use the ***Reset*** field to move a table with a particular code or description to the top of the list. (Click the **Rsq by** button on the left side of the screen if you want to change the Reset function from code to description, or vice-versa.) Type all or part of the code or description in the field, and click **OK**. The list will be reset so that it begins with your entry or the one that most closely matches it. If there is no match, the list will begin with the code or description that immediately would follow the one you entered.

Add/Change Table

Access the *Add Table* and *Change Table* windows from the *Work with Tables* screen. Use these windows to add or change the description and abbreviation for a selected table.

Although they are different windows, they are similar in terms of functionality. The example below is the Add Table window:



In the ***Table#*** field, enter a number for the table. This field may contain a 4-digit number.

In the ***Description*** field, enter text to describe the purpose of the table. Enter a shortened version of the description in the ***Abbreviation*** field.

The ***Sequence by*** radio set controls whether the data in the table will be ordered by **Description**, **Code** or **Alternate**. The recommended selection is **Code**. In all cases, the data will be listed alphabetically.

Copy Table

Use this window to create a new table, new table entries or both from an existing table. To access this window, select a table from the *Work with Tables* screen, and click the **Copy** button (**3**):



You may copy tables to the same table file, to a table file in a different library or to an entirely separate application.

NOTE

This option has the potential to cause unwanted or adverse effects should it be used without a thorough understanding of New World's Table Processing.

Below are three, hypothetical examples that show you how to use the copy function. These examples are not factual, so numbers and values may be inaccurate:

Example One
The system you are using has a Manager Table (34) and an Employee Table (51). During the installation of the system, you create the Manager Table first. Since the Employee Table also will contain the managers, rather than create the Employee Table from scratch, you choose to copy the Manager Table as the basis for creating the Employee Table:

1. Select the Manager Table (34) on the *Work with Tables* screen, and click **Copy** (**3**). The *Copy Table* window will be displayed.
2. Leave the library and the application code the same, and in the **To** section of the window, enter the number of the Employee Table (51) in the ***Table#*** field.
3. In the **Copy** section of the window, select **Entries** (**E**), and click **OK**. The entries will be copied to the Employee Table. The Manager Table will not be affected.

Example Two
You have a set of live files and a set of test files. You find that one of the tables in your test files is out of date. You want to update it with the values from the live files:

1. Delete the table from your test files using the **Delete** button (**4**) from the *Work with Tables* screen.
2. Go to *Work with Tables* in your live files and use the **Copy** button (**3**) on the table you want to copy.
3. In the **To** section of the window, enter the name of your test files library in the ***Library*** field.
4. Leave the default entries in the ***Application Code*** and ***Table#*** fields.
5. Select **Both** (**B**) to copy the table master and its entries.
6. Click **OK**. The table will be copied to your test files.

Example Three
You are setting up a new application, such as *Utility Management*. It has a State Table (61). You have a complete and accurate state table in another application:

1. Select *Work with Tables* in the application with the complete state table.
2. Select the State Table, and click **Copy** (**3**).
3. Enter the name of your Utility Files Library as the copy-to ***Library***.

4. Enter the application code **UT** as the copy-to ***Application Code***.
5. Enter **61** as the copy-to ***Table#***.
6. Select **Entries** (**E**) to copy table entries.
7. Click **OK**.

If you are copying a table from one library to another, specify the name of the copy-to ***Library*** in the **To** section of the window. This library likely will be a files library.

If you want to copy a table from one application to another, specify the copy-to ***Application Code*** in the **To** section of the window. Application codes are two-character codes New World Systems uses to identify different applications.

In the ***Table#*** field, identify the copy-to table.

Use the **Copy** radio set to select a **Table** master (**T**), table **Entries** (**E**) or **Both** (**B**) to be copied.

The ***Sequence by*** radio set controls whether the data in the table will be ordered by **Description**, **Code** or **Alternate**. In all cases, the data will be listed alphabetically.

In the ***Description*** field, enter text to describe the purpose of the table. Enter a shortened version of the description in the ***Abbreviation*** table.

Delete Table

Use this window to delete a table from the list. When a table is deleted, all of the entries for that table also will be deleted. To access this window, select the table on the *Work with Tables* screen, and click the **Delete** button (**4**):



To confirm the deletion, click the **Delete** button (**F13**). To cancel the deletion, click **Cancel** (**F12**)**.** A report of the deleted table will be produced.

Print Table

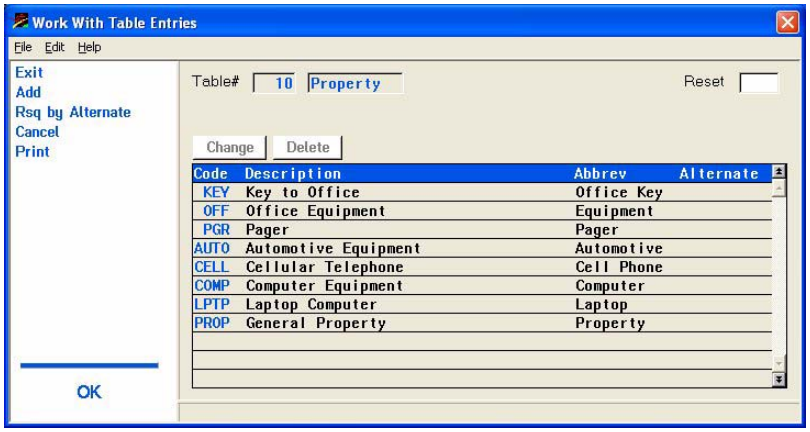
Use this window to produce a listing of the information contained in a particular table. You also may specify whether to include the table entries on the listing:



To submit the listing for printing, click **OK**. To exit without printing, click **Exit** or **Cancel**.

Work with Table Entries

Use this window to work with the entries of a table. To access this window, select the table on the *Work with Tables* screen, and click the **Table Entries** button:



If the list of table entries is too long for one screen, a scroll bar will be available to the right of the list. Click the arrows to scroll the list up and down.

Use the ***Reset*** field to go directly to the entry or its general area without having to page up or down multiple times. When the list is sequenced by code, you may reset the list at the desired code; when it is sequenced by description, you may reset the list at the desired description or partial description, and so on.

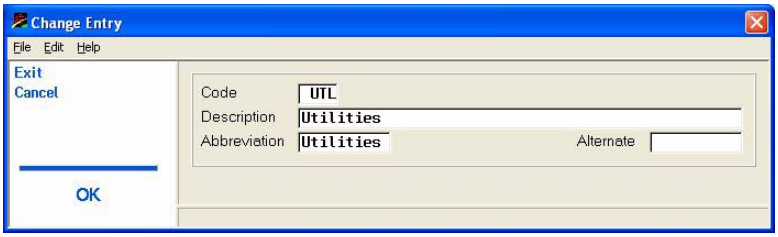
Use the **Change** button (**2**) to change information for the selected table entry, **Delete** (**4**) to delete a table entry from the list or **Add** (**F6**) to add a new table entry to the list.

Use the **Rsq by** button to change the order of the entries in the list. Clicking this button will toggle the sequence of the list from code to alternate, from alternate to description or from description to code.

Use the **Print** button (**F17**) to produce a report that shows the table and its codes.

Change Entry

Use this window to change the code, description or abbreviation of the selected table entry. Access this window by selecting the entry on the *Work with Table Entries* window and clicking the **Change** button (**2**):



In the ***Code*** field, enter an alpha, numeric or alphanumeric code to represent the table entry. It may be 1 to 4 characters in length. **A planned and organized naming convention for table codes is highly recommended.**

Use the ***Description*** field to describe the table entry. Your description should be concise and suggestive of the code's nature or purpose. This field may contain 50 characters.

Due to space limitations, the full description of a code may not fit on the screen, field or report in which it should appear when its associated code is selected; therefore, use the ***Abbreviation*** field to provide a shortened form of the description. The abbreviation may contain 10 characters. Whenever a description exceeds 10 characters, the abbreviation will appear in its place. For the sake of convenience, when creating an abbreviation, keep it simple and as similar to the description as possible; for instance, if the description is "Quarter Inch Thread," make the abbreviation something like "QrtrInThrd." The entry made in this field provides the name of the field that displays on the User Defined Information Maintenance screen.

If necessary, you may use the ***Alternate*** code to call particular programs or reports when the table code is selected. Alternate codes typically are used for reports, *Word Interface* documents and the IBR program. This field may contain 10 characters.

Delete Entry

Use this window to delete a selected table entry. To access this window, select the entry on the *Work with Table Entries* window, and click the **Delete** button (**4**):

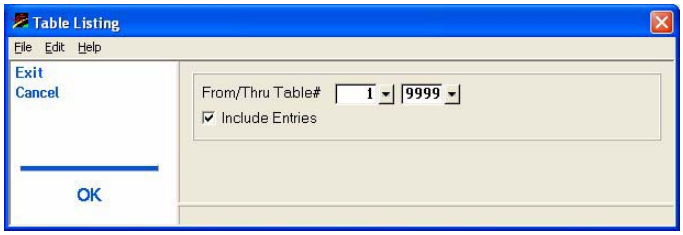


To confirm the deletion of the selected table entry, click the **Delete Record** (**F13**) button. Click **Cancel** (**F12**) to exit the *Delete Entry* window without deleting the code.

Table Listing

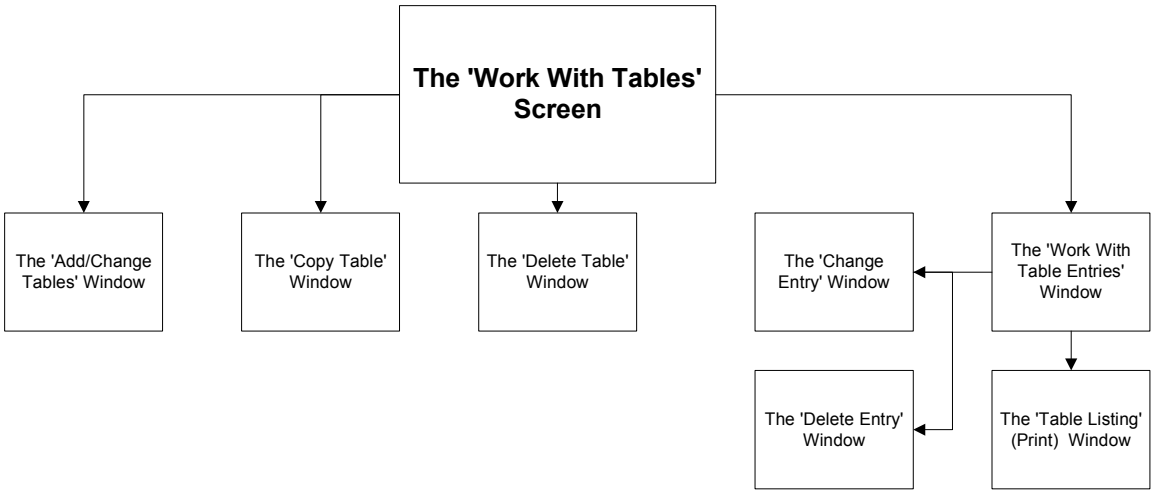
Use this window to produce a report of the information contained in one table, a range of tables or all tables. You also may specify whether to include the table entries in the report.

To access this window, click **Print** (**F17**) from the *Work with Table Entries* window:



To submit the report for printing, click **OK**. To exit without printing, click **Exit** or **Cancel**.

Work with Tables Flowchart



Chapter 5
Work with Security Authorizations

The **Security Authorizations** program lets you specify the operations to which each user is authorized for every program in a software application. These operations include adding, changing, deleting and displaying information and unlocking entries. (Information associated with a locked entry cannot be changed or deleted.)

You may define program authorizations for an individual user or a group of users and select individual users who will be associated with a group.

Security Authorizations also lets you specify the window border characteristics for the options that appear in a pop-up window. You have the ability to define the color of the border, the character that will make up the border and whether the border will be displayed in reverse video. You may define these characteristics for an individual user or a group of users.

NOTE

Caution: Changes to the standard GUI borders may adversely affect the performance of the software.

Another Security Authorizations option lets you set up security information for each user. This information determines whether a user will be associated with a group.

- Group security will give all users in that group the same authority.
- Individual program security is defined specifically for a user who is not associated with a group.

During normal processing of your software application, program security may be turned on or off. If it is turned off, none of the security authorizations defined will be confirmed, and every user may access any process or option.

NOTE

An exception to the above occurs if another process is being used to limit the availability of certain options to certain users. One such process is the use of Dynamic Menu Processing. A combination of Dynamic Menus and Program Security also may be used. (See Chapter 3 for details).

NOTE

Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

Work with Application Programs

Use the *Work with Application Programs* option to define the security characteristics of each program that will check program security. All of the necessary programs and characteristics were defined before your software was installed.

NOTE

This option is not shown on any menu. The information it contains SHOULD NOT be changed. ***Any changes made using this option may render the program security INOPERABLE.***

Applications Programs Security

To work with application programs security, enter a **0** in the entry field of the *Security Menu***.** This option is not shown on the menu.

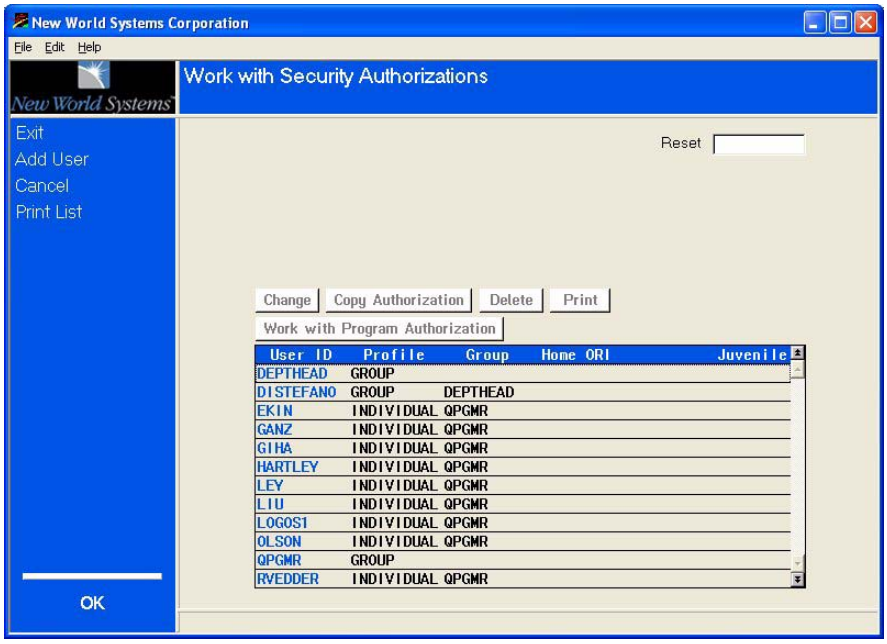
NOTE

The information accessible through this option SHOULD NOT be changed. ***Any changes made through this option may render the Program Security INOPERABLE.*** *If you have questions or need assistance with this program, please call New World Systems Customer Support.*

Work with Security Authorizations

Security authorizations may be defined on two levels: individual (user) and group. Once a security profile has been defined for a user or group of users, you may specify the exact operations the user or group will be allowed to perform for each option in the software application. These operations include the ability to add, change, delete, inquire and lock or unlock certain information.

To set up security authorizations, select *Work with Security Authorizations* from the *Security Menu*:



Use this screen to specify, by program, the operations to which each user will be authorized. You may authorize a user to some, all or none of these operations; for example, you may want to authorize a user to view certain information within a program but not to add, change or delete that information.

You also may set up authorizations for a group of users rather than an individual user--for example, a group called DATA ENTRY for your data entry clerks. Once security has been defined for a group, you may associate individual users with it. The security defined for the group will be the default security defined for each individual associated with the group.

A user may be associated with a group and still have individual security authorizations defined. In such a case, any authorizations for a program that have been defined for the individual will override the group authorization for that program. If the individual does not have security defined for a particular program, the group security for that program will be used.

Regardless of whether an individual is associated with a group, security authorizations always may be specified at the individual level. These securities will override any group security.

To work with security authorizations for an existing user or group, select the **User ID**, and click the option you want.

Use the ***Reset*** field for quick repositioning of the list. Type all or part of the user ID you want to have moved to the top of the list, and click **OK**. The list will be reset to the first user that matches, or most closely matches, your entry. If a match is not found, the list will be reset alphabetically to the user immediately following the one you specified.

Use the **Change** option (**2**) to change the Profile Type or Group Profile of a selected user.

Use the **Copy Authorization** (**3**) option to copy the security information from one user to another.

Use the **Delete** option (**4**) to delete a user from the list. When a user is deleted, all of the security authorizations for that user also will be deleted.

Use the **Print** option (**6**) to produce a report of the security authorities and window border characteristics of each program for a selected user.

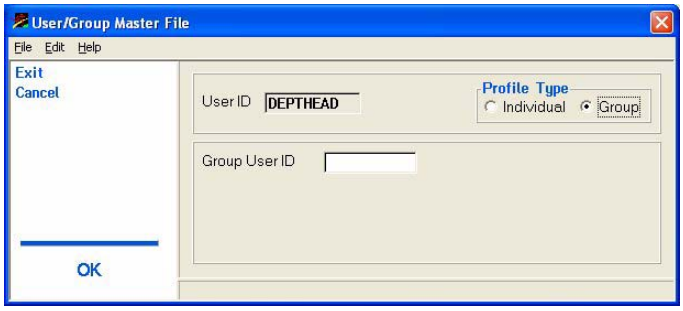
Use the **Work with Program Authorizations** option (**12**) to specify program authorities for a selected user.

Use the **Add User** option (**F6**) to add a new user to the list.

Use the **Print** option (**F17**) to produce a report of the security authorities and window border characteristics of every program for every user in the list.

User/Group Master File

Use this window to add a user or group of users to the security authorizations list or to change information for an existing user or group. If you are changing an existing record, access this window by selecting the user or group in the list and clicking **Change** (**2**). If you are adding a new record, access this window by clicking **Add User** (**F6**):



In the ***User ID*** field, name the user or group for whom program authorizations will be specified. If you are specifying authorizations for a user, the User ID should be the same as the User Profile for the user. If you are specifying authorizations for a group, the name should be representative of the group you are defining, such as CASHIER, DATA ENTRY, CLAIM OFFICER, etc.

In the ***Profile Type*** radio set, select whether the User ID is an **Individual** (**I**) or **Group** (**G**) profile. If the User ID is an individual user, the ***Profile Type*** will be Individual. If the User ID is a group of users, the Profile Type will be Group. This group must exist already.

If the user will not be associated with a group, leave the ***Group User ID*** blank.

You may use a generic name to identify a group of users. Once authorizations have been defined for a group, you may associate individual users with the group, so they have the same authorizations (unless authorization is overridden for an individual program).

The following fields are applicable to Public Safety only:

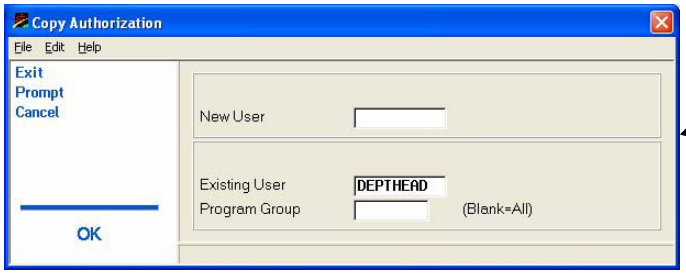
In the ***Home ORI #*** field, identify the home jurisdiction of the specified user.

Use the ***Juvenile Access*** field to specify whether the current user is to have access to juvenile information, ***Officer Access*** to specify whether the user is to have access to officer information and the ***Closed Record Access*** to specify whether the user is to have access to records that have been closed.

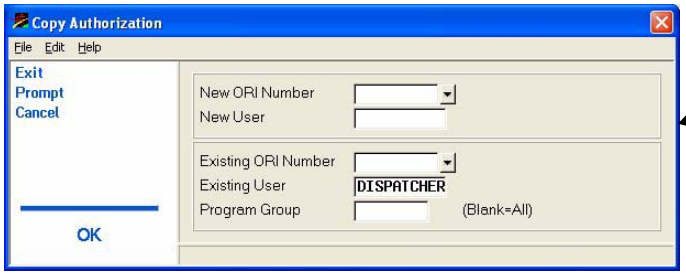
Use the ***Default Court Operator*** field to identify the code of the operator. You may prompt the field for a list of valid codes.

Copy Authorization

Use this window to copy all of the program authorizations from one user to another. To access this window, select the user you want to copy, and click **Copy Authorization** (**3**):



Logos screen.



Aegis screen.

In the ***New User*** field, identify the user who will receive the copied authorizations. (When you select the **Copy Authorization** option, the ***Existing User*** field will be defaulted with the name of the user whose authorizations will be copied.)

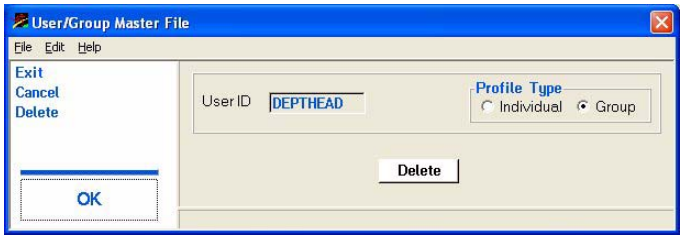
Use the ***Program Group*** field to copy the program security authorizations of a user by program group. Name the group to be copied. Leave the field blank to copy all groups that are attached to the user being copied.

The following fields are applicable to Public Safety only:

In the ***ORI Number*** field, identify the home jurisdiction of the new user. In the ***Existing ORI Number*** field, identify the home jurisdiction of the verified user. Both fields may be prompted for valid entries.

Delete User/Group Master File

Use this window to delete a user or group file from the list. To access this window, select the user or group file you want to delete, and click **Delete** (**4**):



To confirm the deletion of the selected user or group file displayed in this window, click **Delete** (**F13**). To cancel the deletion and return to the preceding screen, click **Exit** (**F13**) or **Cancel** (**F12**).

User Security Authorization Listing

Use this window to print a listing showing the security authorizations for one or all users. To access the *User Security Authorization Listing* window for an individual user, select the user from the *Work with Security Authorizations* screen, and click **Print** (**6**). To access the window for all users, click **Print List** (**F17**) from the *Work with Security Authorizations* screen:



To submit the listing for printing, click **Print Listing** (**F17**). To cancel the listing and return to the preceding screen, click **Exit** (**F3**) or **Cancel** (**F12**).

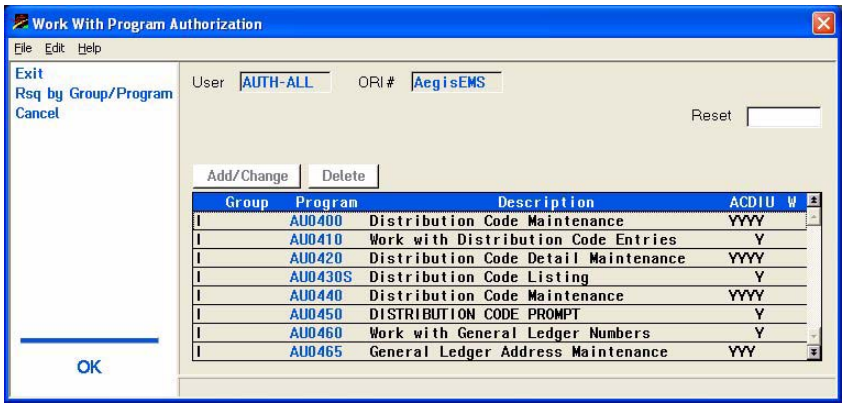
Work with Program Authorization

NOTE

The security processes for public safety and public administration applications differ. Public safety applications include extra fields and processes that public administration applications do not; therefore, the screens in this section may differ from those you see.

Use this option to select the operations (add, change, delete, inquire and unlock) to which a user or group of users will be authorized for each process in your software application. If an authority is not applicable for a given operation, **N/A** will be displayed when program security is added or changed.

To access this window, select a user from the *Work with Security Authorizations* screen, and click the **Work with Program Authorization** button (**12**). If you are a Public Safety user, select an ***ORI#*** from the *Jurisdiction Prompt*:



An alphabetical list of all programs will be displayed, showing the program names, descriptions, program groups (if applicable), authorities granted and window border characteristics.

The list of authorizations will consist of program authorities that are specified for the individual user, the group profile with which a user may be associated or a combination of individual and group.

If the selected user is associated with a group profile, the authorizations displayed for each program will have been granted to the group profile. A **G** will be displayed next to the appropriate program(s), indicating the authorization is for a group profile.

You may have individual security overrides of group security. Individual overrides must be done on a program-by-program basis; therefore, a user may have most of the same authorities as a group (by associating the user to a Group Profile) but individual authorities for selected programs.

An individual authority is marked with an **I** next to the appropriate program.

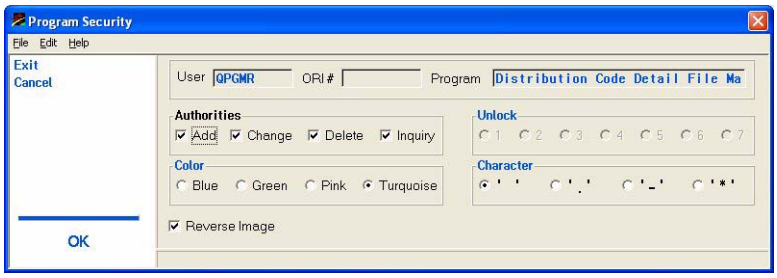
Use the **Add/Change** button (**2**) to specify the program authorizations for the selected user.

Use the **Delete** button (**4**) to delete the individual security authorizations for a program. A group authorization cannot be deleted from here; it must be deleted from *Work with Security Authorizations*.

Use the **Rsq by Group/Program** button (**F9**) to change the sequence of the list from program only to program and group, and vice versa. The appropriate columns will be highlighted to identify current sequencing. You may reposition the list to a particular program by typing the program name in the ***Reset*** field and clicking **OK** or pressing **Enter**.

Add/Change Program Security

Use this window to add or change the security information for a selected program and user or group. To access this window, select a program from the *Work with Program Authorization* window, and click **Add/Change** (**2**):



The information on this window determines the authorizations (add, change, delete, inquire and unlock) the user or group has for the selected program. It also determines the window border characteristics, if applicable.

In the ***Authorities*** section, grant or revoke authority to a function by selecting it (a checked box indicates authority granted). Functions that do not apply to the selected program are disabled.

Use the ***Unlock*** radio set to grant or revoke the authority to unlock information for the program. Select a number (1-7) to specify the level. If the unlock function does not apply to the selected program, this radio set is disabled.

Border Characteristics

For each operation displayed on the Work with Program Authorization screen, the default window border characteristics will have been defined already. They will exist only for those operations that occur as pop-up windows and will determine how the border of the pop-up window looks. Window border characteristics cannot be defined for operations that do not occur as pop-up windows.

The ***Color*** radio set lets you select the color of the window border. The available selections are blue, green, pink and turquoise. This radio set will be displayed only if the selected program has a window border.

The ***Character*** radio set lets you select the character that will be displayed in the window border. The available options are no characters, periods **(.)**, asterisks (*****), dashes **(-)** in the top and bottom borders and center slashes **(|)** in the left and right borders. This radio set will be displayed only if the selected program has a window border.

NOTE

In GUI, the dash (-) is the only available character.

Select the ***Reverse Image*** field if you want the window border to be displayed in reverse image. To select or deselect the field, click it. This field will be displayed only if the selected program has a window border.

Security Toggle Verification

Use this window to turn security on and off. To access this window, select the *Enable/Disable Security* option from the *Security Menu*:

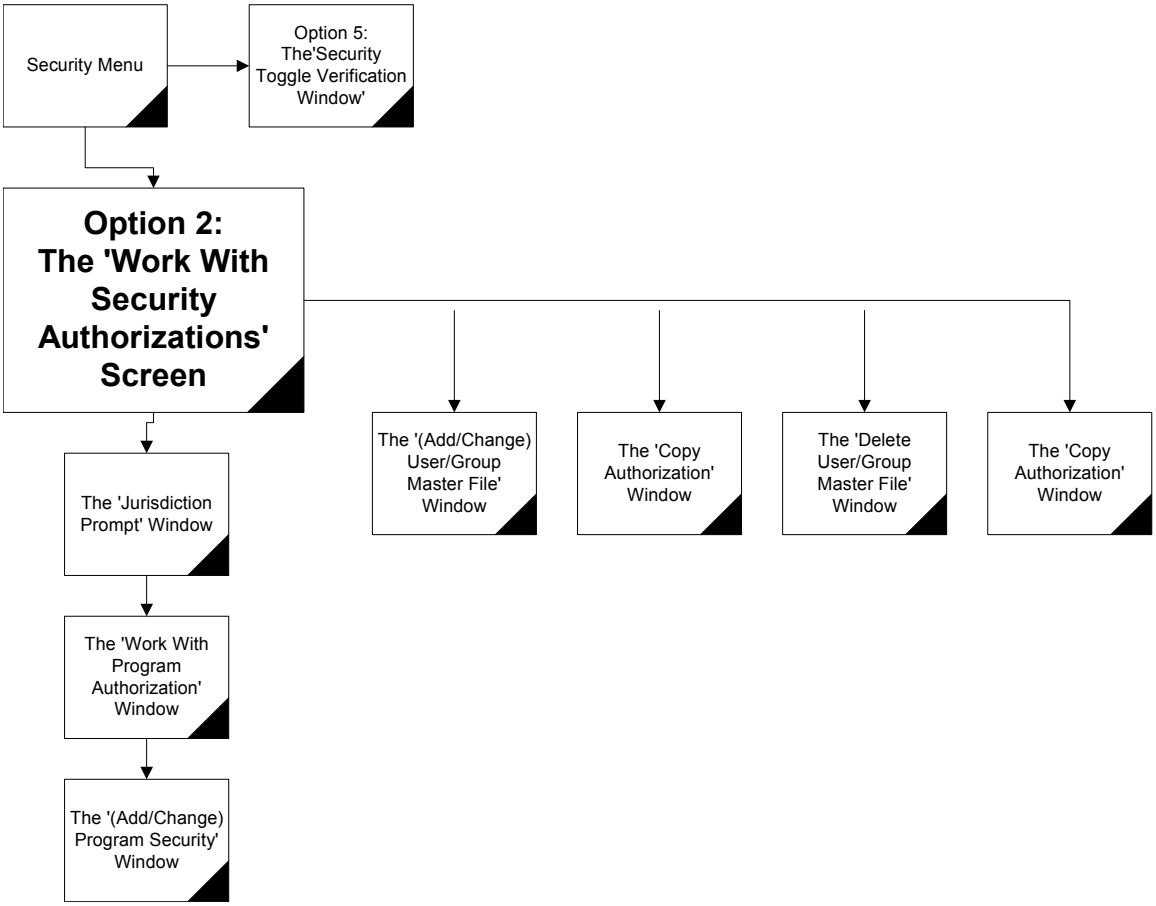


The note above the **Security Toggle** button will tell you whether security currently is turned on or off. Click the button to turn security on or off (**F20**). Click **Exit** (**F3**) or **Cancel** (**F12**) to leave security in its current status.

NOTE

If you turn security on, you must set up authorizations for all of your users using the Work with Security Authorizations option on the Security menu.

Work with Security Authorizations Flowchart



Chapter 6
Work with Document Processing Control

Document Processing gives you easy and common access to all documents associated with a data base record. This feature supports free-form, *Word Interface*, image document and other options for an unlimited number of documents. (See Chapter 7 for a complete list of document types.)

Free-form documents contain free-form text that is typed from the keyboard and stored in a regular data base file. *Word Interface* and image documents are stored in folders and require the setup of control files before they may be used.

> **NOTE**
>
> *Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.*

Set up Document Control Files

When you are using only free-form documents, no setup is required. These types of documents are indexed and stored automatically within the application data base files.

Word Interface will require the following setup before these types of documents may be used:

1. Enroll all of the user profiles that will be creating *Word Interface* documents. Find instructions for this procedure in the *Word Interface* manual.
2. Set up a skeleton document that contains any special attributes, i.e., print sizes and margins, that may be required for your installation. It is best to set up the default document with a ***PUBLIC** security authorization, so that folder security may be enabled as described in the next section.
3. After this default document is created, enter the document name and folder name for each file that will incorporate *Word Interface* narrative. Enter these names from *Document Set Up File Maintenance*.
4. The last step is to create a folder or a folder path where the actual documents will be stored on the iSeries 400. Once it is created and entered in Document Set Up File Maintenance, this folder path should not be changed. You should create a folder for each application. If the application is ORI-based, create a folder for each ORI inside the application folder with the same name as the ORI. Inside each folder, create a folder for each file that will use Document Processing.

You may create an additional level of folders if authority codes are to be used for additional security. To reduce the complexity of document processing, authority-level codes should not be set up during the initial implementation. Authority level codes are explained in the next section.

Document Authority and Security

The standard New World Systems program security has been enabled for all document programs. In addition to standard program security, there is *Word Interface* Document Security and Authority Level Code Security.

NOTE

Adding levels of security is not difficult, but removing them can be time consuming, since each document may need to be changed individually.

You may set up *Word Interface* Document Security for each user profile or authorization list against each folder and then maintain it at the folder level. This folder-level approach to security is the recommended method. If necessary, an individual document may be secured through option 14 of the *Work with Documents* panel without affecting the security already set up for the folder path.

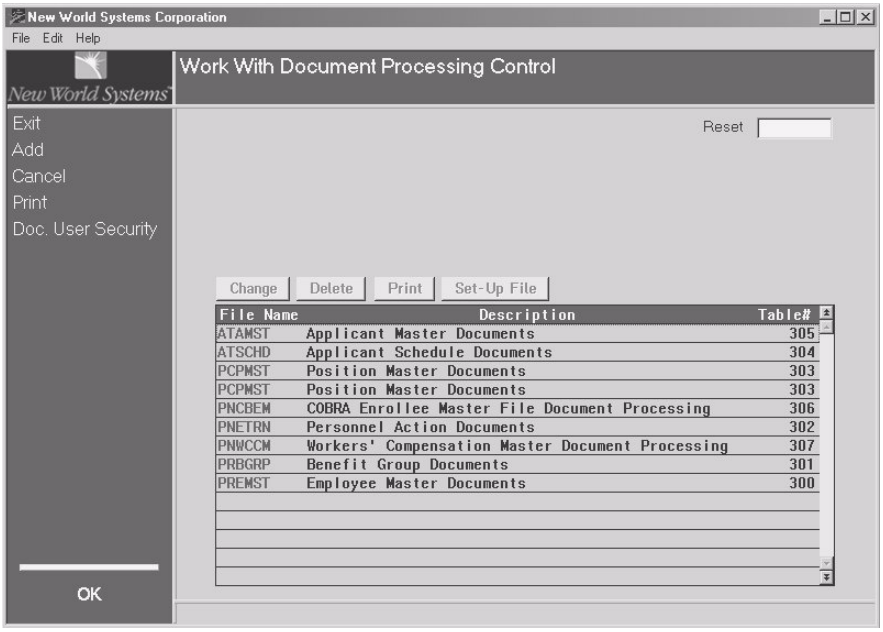
Authority Level Code Security is an optional level of security that lets you attach a list of user profiles to a table code and, in turn, assign that code to an individual document. This security will limit access to the document to the user profiles associated with that particular authority code level. Authority Level Code Security is intended mainly to facilitate a smooth transition from previously released versions of the narrative processing that had narrative sections. Narrative sections no longer are used, since document processing allows for an unlimited number of documents.

Work with Document Processing Control

This screen acts as an index of files and the setup required to use *Word Interface* templates. It is the launching point of all *Work with Document Processing Control* functions. (The flowchart on the last page of this chapter shows you how the subsequent screens are accessed from this point.)

For more information on *Word Interface*, please refer to your *Word Interface* manuals.

To access this screen, select *Work with Document Processing Control* from the *Security Menu*:



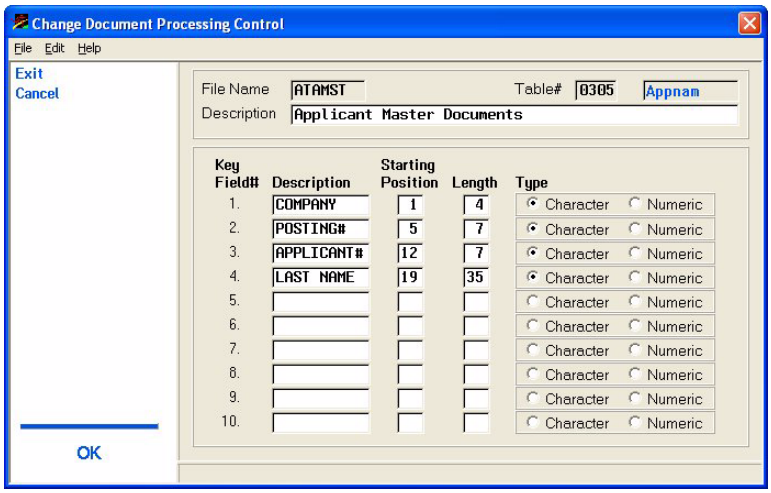
Add/Change Document Processing Control

To access this window, select **Change** (**2**) or click **Add** (**F6**) from the *Work with Document Control Processing* screen. Use this window to add, change or delete the document processing control information associated with a file. This information includes the file name, the table number the file uses to set up authority levels and up to ten key field descriptions, starting positions, lengths and types.

If setup information is associated with an entry that is being deleted, a message will be displayed to let you know. If you confirm the delete option, the setup information will be deleted, along with any user security setup options over the combination of the file and setup entries.

NOTE

Only experienced New World Systems representatives should add, change or delete document processing control information; changes to this information may cause undesirable results.



The ***File Name*** field contains the name of the file that will be associated with Document Processing. The file name must be valid for the product being used.

The ***Table#*** field is required. It contains the number of the table associated with the file entered. Each entry in this table is used to set up an authority level for a particular document.

The first ***Description*** field contains the complete name of the file that will be associated with Document Processing.

In the ***Description*** column, enter a description for each key informational field that will appear when Document Processing is used.

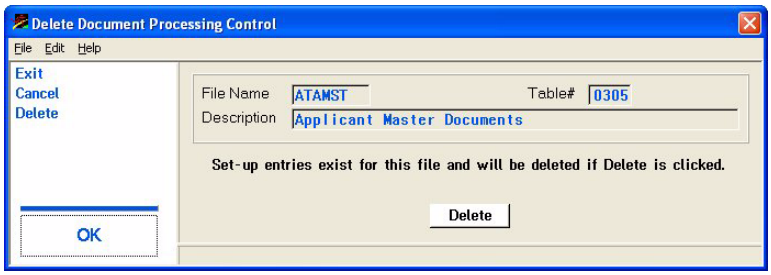
In the ***Starting Position*** column, enter the starting position of each key informational field. This entry may not overlap previous field entries.

In the ***Length*** column, enter the length of each key informational field.

In the ***Type*** column, select whether the type of entry in each key informational field will be character or numeric.

Delete Document Processing Control

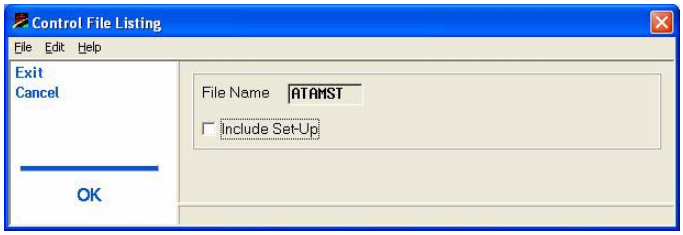
To access this window, click **Delete** (**4**) from *Work with Document Control Processing*:



Click the **Delete** button (**F13**) to delete the selected Document Processing Control record from the system. To cancel the delete and return to the preceding screen, click **Cancel** (**F12**).

Control File Listing

To access this window, select a file on the *Work with Document Processing Control* screen, and click the **Print** button (**6**):

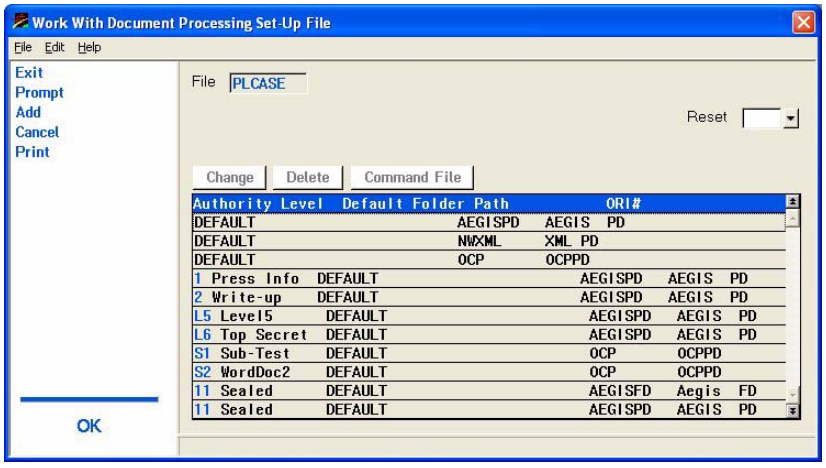


Use this window to produce a listing of information for the selected control file.

Select the ***Include Set-Up*** field if you want to have setup information included on the listing.

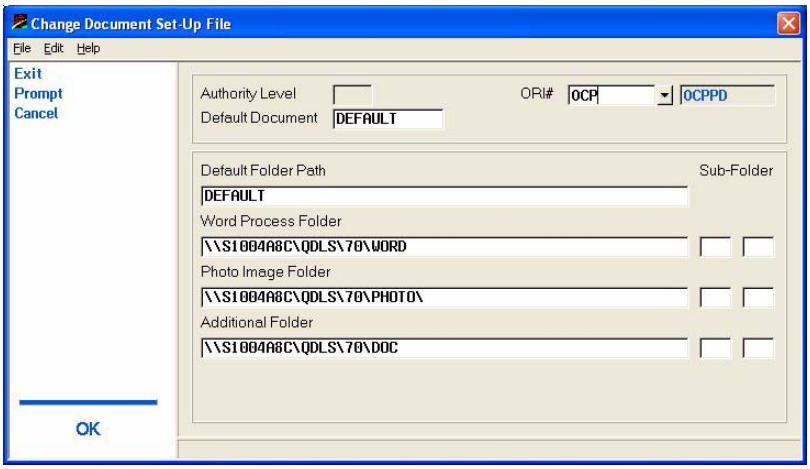
Work with Document Processing Set-Up File

To access this window, click the **Set-Up File** button (**12**) on the *Work with Document Processing Control* screen. Use this window to access other windows that will let you add, change or delete document setup files and work with Command File Maintenance, as explained in the following pages and outlined in the flowchart at the end of the chapter:



Add/Change Document Set-Up File

This window determines the hard drive and folder in which a document will be stored. The hard drive and folder may be determined while the document processing setup file information is added or changed.



Use the ***Authority Level*** field to define the levels of authority over documents for a particular file. Users then may be authorized or not authorized to each authority level for each file. You may leave the field blank to waive security. If you are adding a document setup file, you may prompt the field to select from a list of valid authority levels.

Use the ***ORI#*** field to identify the home jurisdiction for the selected user. This field is displayed in Public Safety applications only.

In the ***Default Document*** field, identify the document to be used as a base for the creation of new documents. This document is kept in the default folder path. It must follow all naming conventions as defined with *Word Interface*. *This entry is required if a default document path is entered*.

NOTE

If the name of the document entered in this field is mapped to a folder path, and that path is entered in the ***Default Folder Path*** *field, a skeleton of that document will be displayed when you create a new Word Interface Document. If you enter "Default" in this field, the program will create a folder called "default" on the iSeries 400.*

If you have entered the name of a default document, a ***Default Folder Path*** is required. It identifies the default folder path that contains the default document. The path name must follow all naming conventions as defined with *Word Interface*. If you enter "Default" in this field, the program will create a folder called "default" on the iSeries 400.

Word Process Folder will determine where all Word Processor and Notepad documents will be stored. This entry may be a folder path on the network, stored in a drive. It does not have to be on the iSeries 400.

Photo Image Folder will determine where all Photo Imaging documents will be stored. This optional entry may be a folder path on the network, stored in a drive. It does not have to be on the iSeries 400.

Additional Folder will determine where miscellaneous documents will be stored. This entry may be a folder path on the network, stored in a drive. It does not have to be on the iSeries 400.

In the ***Sub-Folder*** column, enter **000 000**. The program then will automatically determine when to change to another directory.

NOTE

If an ORI # in one of these fields is longer than 8 characters, you must add a decimal point after the eighth character. As an example, WI0500000 would be entered as WI0500000.0

If many different *Word Interface* documents are stored, it may be necessary at a later time to use an Auxiliary Storage Pool (ASP). An ASP must be set up initially. To do so, call **AUNAME**, fill in the bottom information to use ASPs, and enter the starting position of the ASP name on each line.

NOTE

When you enter information in the Word Interface folder path, begin the ASP at the same point for each file.

Delete Document Set-Up File

To access this window, select the setup file you want to remove from the list, and click the **Delete** button (**4**):



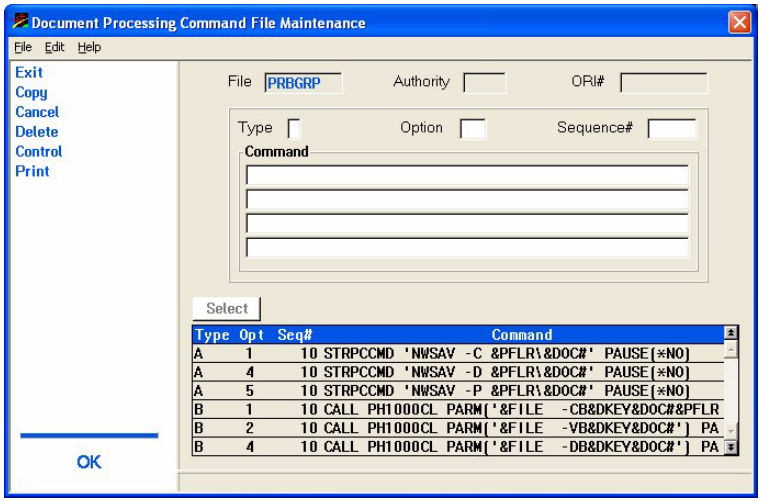
Click **Delete Entry** (**F13**) to delete the entry. Click **Exit** (**F3**) or **Cancel** (**F12**) to exit the window without deleting the entry.

NOTE

When an entry is deleted, all user-defined security setup options for the combination of the file and setup entries will be deleted.

Document Processing Command File Maintenance

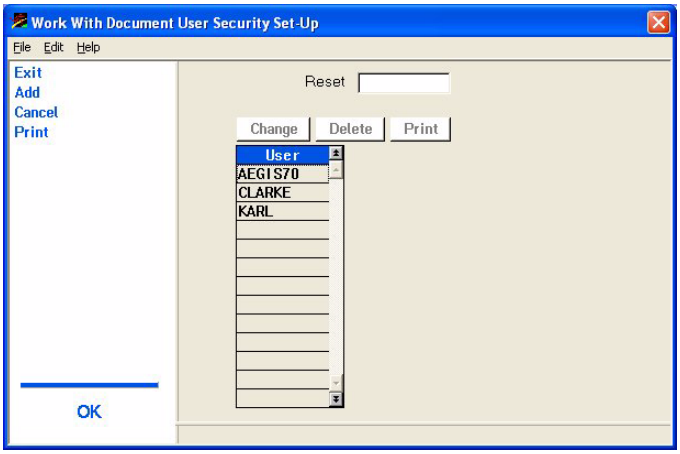
Use this window to write CL commands for different option numbers for the selected file. You may set the commands to activate on a "by option" or a "by type" basis. To access this window, select the setup file you want from the *Work with Document Processing Set-Up File* window, and click the **Command File** (**12**) button:



Enter the ***Type*** and the ***Option*** (number) in the provided fields, and enter the applicable CL command in the ***Command*** field. To copy information to and from another file, click **Copy** (**F6**). To maintain document processing descriptions, click **Control** (**F15**). To produce a report of the control file information in this window, click **Print** (**F17**).

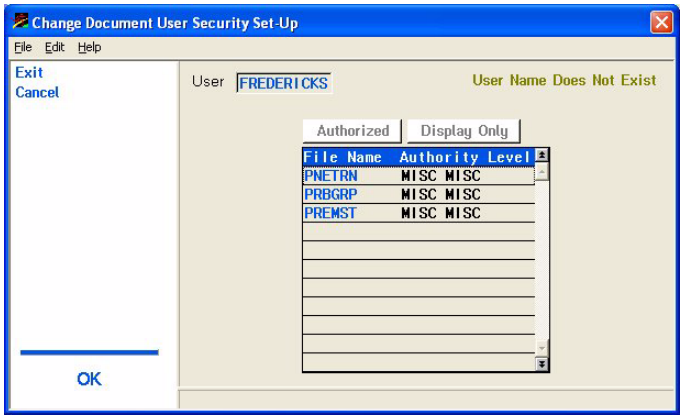
Work with Document User Security Set-Up

To add, change, delete or print a user's security information to documents on your system, press **F20** from the *Work with Document Processing Control* screen. The *Work with Document User Security Set-Up* window will be displayed:



To add a user to the list, click **Add** (**F6**). The *Add User* window will be displayed. On that window, enter the name of the new user in the ***User*** field.

To change a user's security information, select the user, and click the **Change** button (**2**). A window like the following will be displayed:



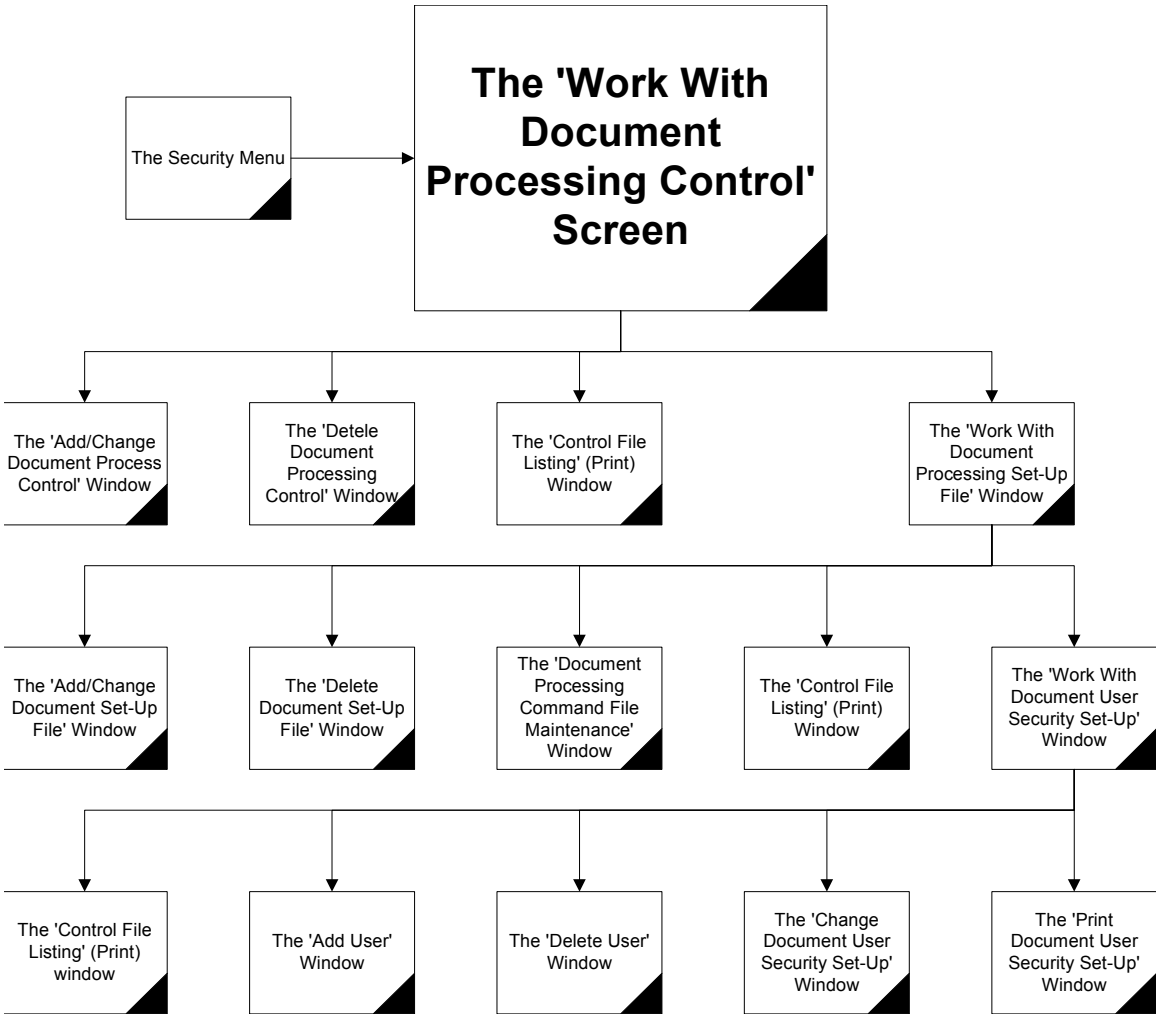
To grant authorization to a file, select the **File Name**, and click the **Authorized** button (**A**). To grant authorization only to display a file, click the **Display Only** button (**D**).

NOTE

*On a traditional iSeries screen, to grant authorization to a file, enter an **A** in the field to the left of the file name. To grant authorization only to display a file, enter a **D**.*

After setting the proper authority levels for the user, click **OK** to save the changes.

Work with Document Processing Control Screens Flowchart



Chapter 7
Work with Documents

Work with Documents is a direct interface with other software packages. When you are working with document types and need additional help, please consult the appropriate manual for each document type; for example, if you need help working with a *Video* document in a Public Safety application, consult the *Aegis Digital Imaging* manual.

NOTE

Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

Document Types

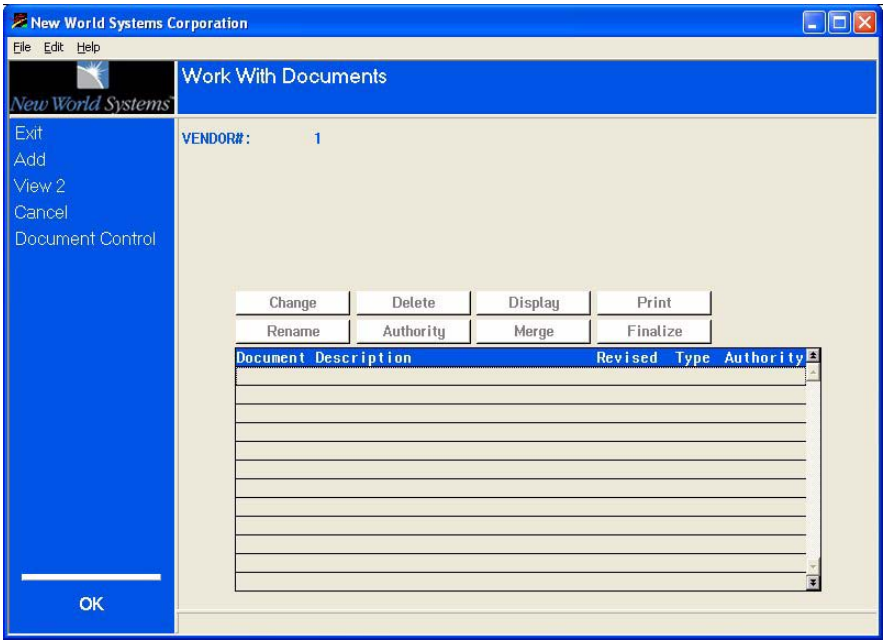
Each document listed on a *Work with Documents* screen will have a **Type**. Each type will be identified by a two-character abbreviation. The first character will be an **R** or an **F**: an R means the document is revisable; an F means the document is finalized and no longer may be changed.

The second character will identify the actual type of the document. There are nine document types:

Character	Type of Document
B	Badge
D	Scanned
F	Free Form
M	Mugshot
R	Original Field Report
S	Snapshot
W	Word Processor
FR	Field Reporting

Work with Documents

This screen is the launching point to all Work with Documents applications. Generally, you may access this screen from any application by clicking the **Documents** button (**24**):



Use the **Change** button (**2**) to change a document. This button is available with revisable documents only.

Use the **Delete** button (**4**) to delete a document from the list displayed. This button is available with all types of documents.

Use the **Display** button (**5**) to display a document for viewing only. This button is available with all types of documents.

Use the **Print** button (**6**) to print a document. This button is available with all types of documents.

Use the **Rename** button (**7**) to assign a different name to an existing document. This option is available with revisable documents only.

Use the **Merge** button (**15**) to combine text and data to create a document that can be revised.

Use the **Finalize** button (**16**) to specify that a document is complete and no longer will accept changes. This button is available with all revisable documents.

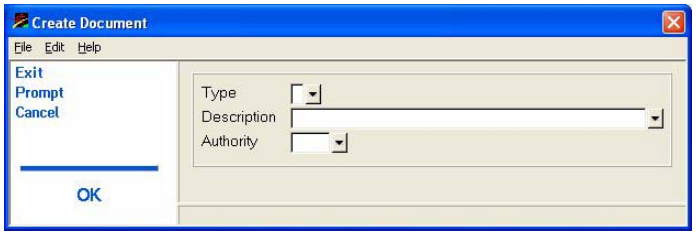
Use the **Add** function (**F6**) to add a new document to the list.

Use the **View** function (**F11**) to change what is displayed on the list portion of your screen. **View 1** displays the revised date, type and the authority level of all documents displayed, and **View 2** displays the creation date, type and document number of all documents displayed.

Use the **Document Control** function (**F14**) to access the Document Processing Control screen.

Create Document

To create a new document, click **Add** (**F6**) on the *Work with Documents* screen. The window below will be displayed:



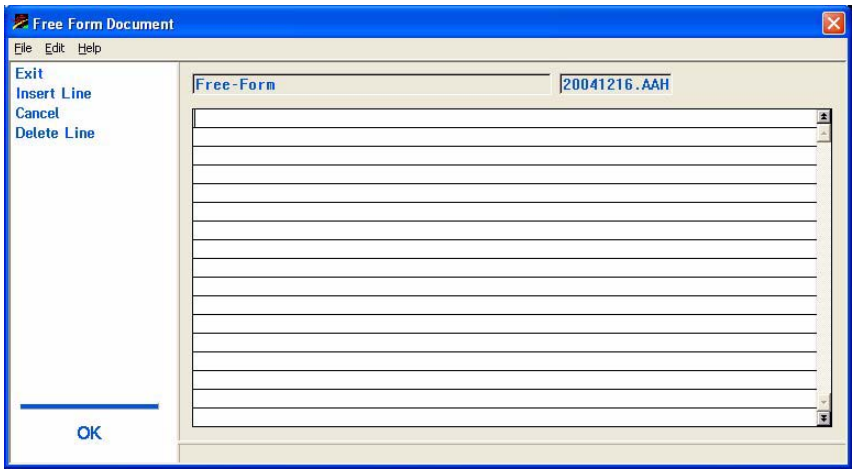
Enter a one-character symbol in the ***Type*** field to identify the type of document you will create. Refer to **Document Types** on page 81, or click the prompt button for a list of valid types.

Enter a ***Description*** of the document you are creating. The description may not exceed 40 characters. You may click the prompt button for a list of valid entries.

Use the ***Authority*** field to define levels of authority over the documents of a particular file. Users may be authorized or not authorized to each authority level for each file. This entry is required if authorities are set up. You may click the prompt button for a list of valid authorities.

Free-Form Document

Use this window to change or create a free-form document. To access this window, enter an **F** (free-form) in the ***Type*** field of the Create Document window:



Whatever text you entered in the ***Description*** field of the Create Document window will appear in the top-left corner of the Free Form Document window.

After entering your text, click **OK** to save it, or click **Exit** or **Cancel** to restore the original text.

Rename Document

Use this window to change the description of a selected document:



Use the ***New Description*** field to enter the new description (name) of the document.

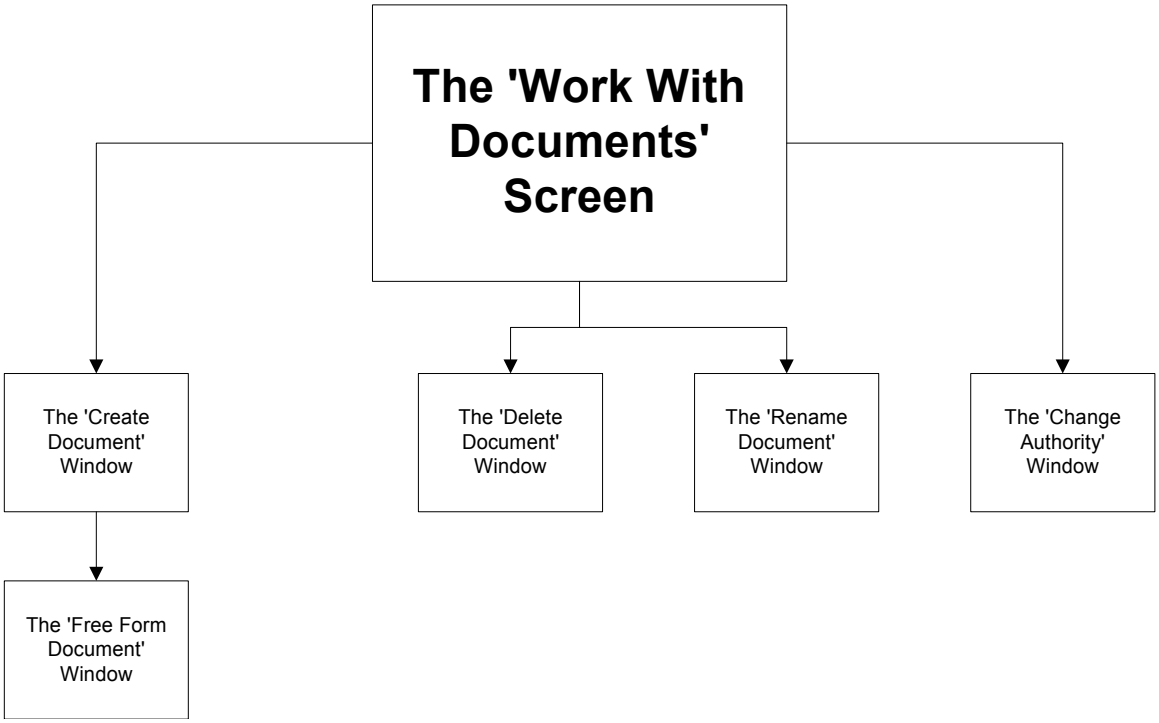
Change Authority

Use this window to change the authority level of a selected document. You must be authorized to the authority level to which the document is being changed:



Use the ***New Authority Level*** field to define the level of authority over the selected document. Users then may be authorized or not authorized to each authority level for the document. This entry is required and must exist in a list of available entries. You may click the prompt button to display this list.

Work with Documents Screens Flowchart



Chapter 8
Work with Report Defaults

The **Report Defaults** feature lets you control the reports produced by a program. You may specify the output queues that will receive the reports, whether to hold the reports, the number of copies and other attributes. Each user may specify the attributes for every report on the system. Once specified, these attributes are retained to be used again the next time the report is produced. With the Report Defaults feature, you are able to custom tailor the handling of spooled files to meet the needs of your installation and avoid programming changes.

NOTE

Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

Base Report Defaults

New World Systems has defined base attributes for each report in the application. If a user does not define the attributes for a given report, the base attributes are used. If desired, these base attributes may be changed.

User Report Defaults

To change the base attributes of a report, click the **Defaults** function (**F15**) from the report screen to bring up the *Report Defaults Maintenance* window. Once you make changes, the new attributes will be used from that point forward. Other users still may use the base attributes or may set their own.

Maintainable Report Attributes

The following attributes may be maintained:

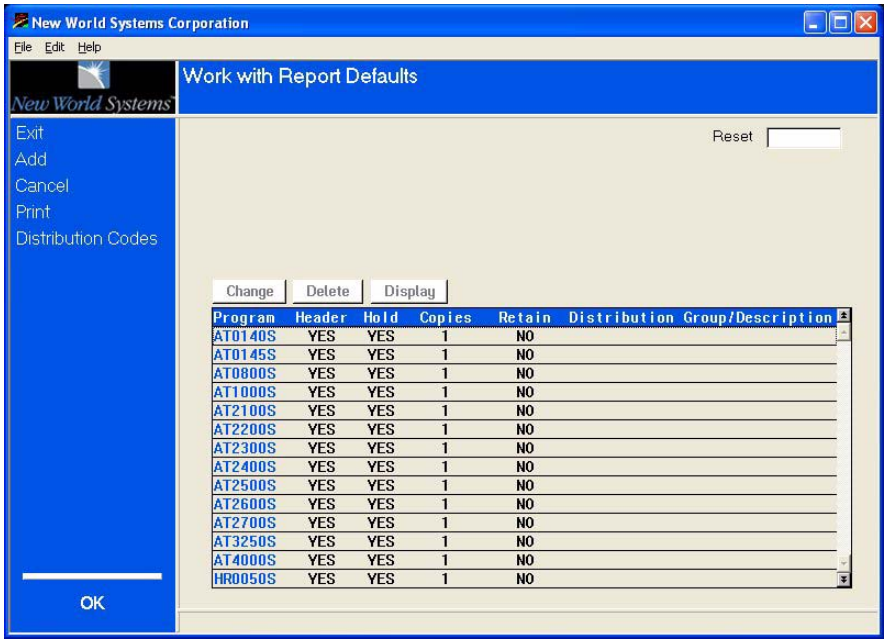
- Header page printing, including the title of the report, user, date and time of the report, report default attributes, selection criteria.
- Distribution group.
- Whether to retain entries.
- Whether to hold or release the spooled file produced.
- Number of copies.
- Output queue to receive the listing.

Screen Defaults

The Retain Entries attribute lets you save the current selection criteria to be defaulted the next time you run the report. Select the ***Retain Entries*** field on the *Change Report Defaults* window to activate this feature.

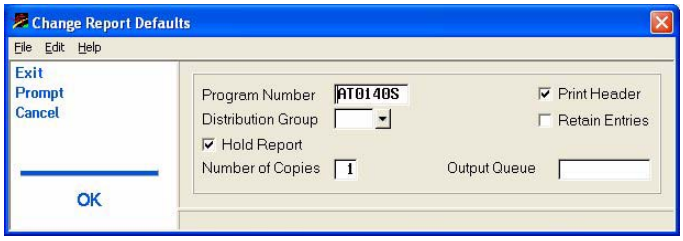
Work with Report Defaults

This screen lists all report programs on file with their attached default information. Use this screen as the launching point to all Work with Report Defaults applications. To access this screen, select *Work with Report Defaults* from the *Security Menu*:



Add/Change Report Defaults

Use this screen to add or change report defaults for a selected report. Every report in the applications must be listed here, or reports will not function. Until each user's defaults have been specified, all defaults for a program will be taken from this list:



To access the *Add Report Defaults* window, click **Add** (**F6**) from the *Work with Report Defaults* screen. To access the *Change Report Defaults* window, select the report you want from the Work with Report Defaults screen, and click the **Change** button (**2**).

In the ***Program Number*** field, enter the report program number.

Select the ***Print Header*** field to have header information listed on the report.

Enter the ***Distribution Group*** that will receive the copies of the listing.

If you select ***Retain Entries***, entries on the report screen will be saved and retained until the next time the report is run.

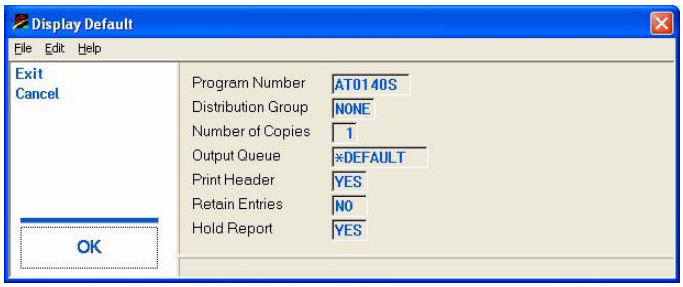
Select the ***Hold Report*** field to have the report output automatically placed on hold when it is created.

Select the ***Number of Copies*** of the report to be generated.

Enter the name of the ***Output Queue*** that will receive the report output. Leaving the field blank will default the report to the output queue from the user profile.

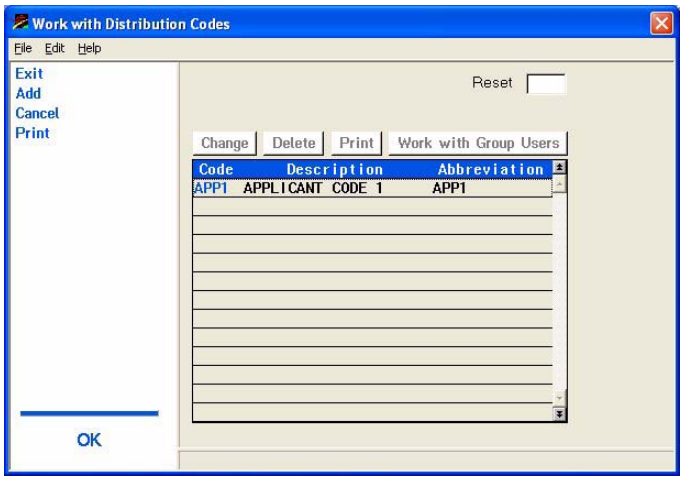
Display Defaults

This window displays the report defaults for a selected document. The defaults are disabled to prevent changes. To access this window, select the report on the *Work with Report Defaults* screen, and click the **Display** button (**5**):



Work with Distribution Codes

A distribution code identifies a group of users who will receive copies of a selected report. The group will be printed on the cover page of the report. Use the *Work with Distribution Codes* window as the beginning point for all distribution code applications:



To access this window, click the **Distribution Codes** function (**F20**) from the *Work with Report Defaults* screen.

Add/Change Distribution Codes

Use this option to add or change distribution codes and their associated information.

To access the *Add Distribution Codes* window, click **Add** (**F6**) from the *Work with Distribution Codes* window. To access the *Change Distribution Codes* window, select the report, and click the **Change** button (**2**) from the Work with Distribution Codes window:

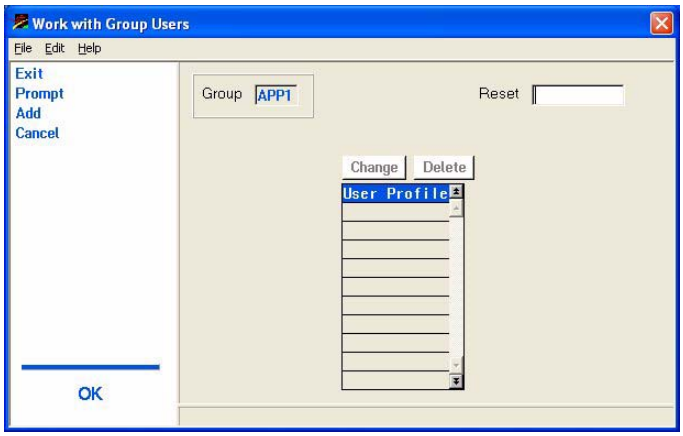


In the ***Group Code*** field, enter the code for the selected distribution group.

Enter the ***Description*** of the distribution code and an ***Abbreviation*** for the description.

Work with Group Users

Use this window to add, change and delete user profiles associated with the distribution codes. To access this window, select a distribution code on the *Work with Distribution Codes* window, and click the **Work with Group Users** button (**12**):



Add/Change User

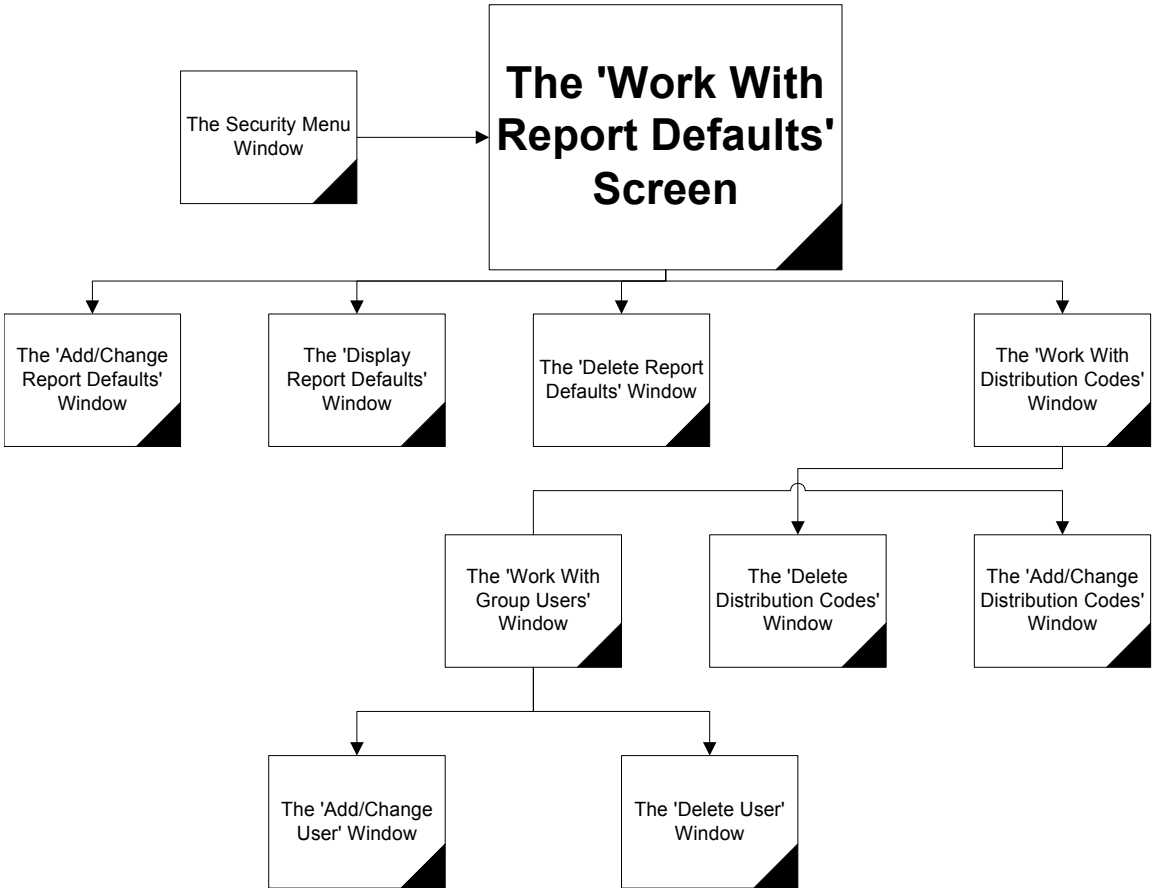
Use this window to add or change a user for the selected distribution group:



To access the *Add User* window, click **Add** (**F6**) from the *Work with Group Users* screen. To access the **Change User** window, select the user profile on the *Work with Group Users* screen, and click the **Change** button (**2**).

In the ***User Profile*** field, enter the name of the user whose profile is being established or changed.

Work with Report Defaults Screens Flowchart



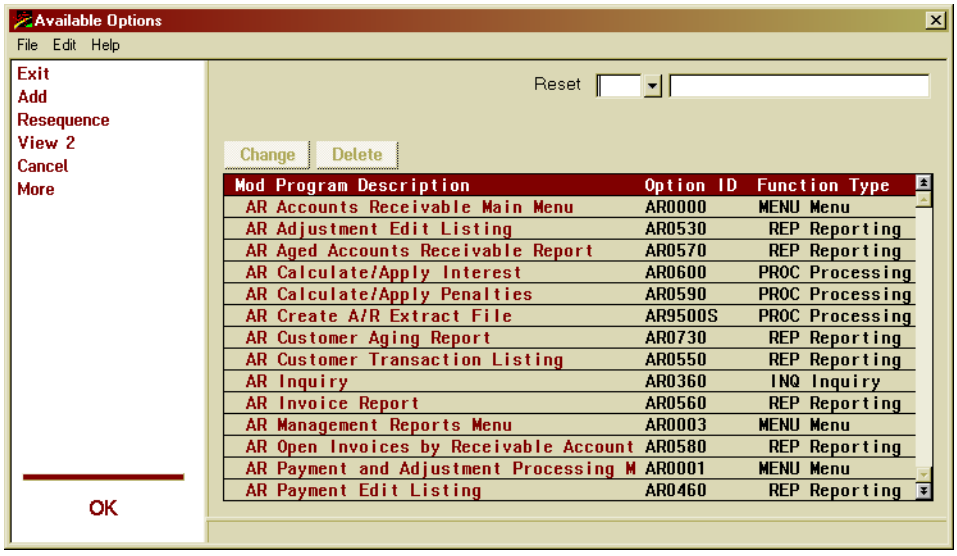
Chapter 9
Available Options *(Logos only)*

The **Available Options** feature maintains the program options that may be selected from the ***Favorite*** field (see Chapter 1).

NOTE

Throughout this chapter, where appropriate, the equivalent keystrokes are shown in parentheses next to the GUI instructions.

To access the Available Options feature, select *Work with Available Options* from the *Security Menu*. You will see a screen like the following:



The programs listed on the screen above will be available for selection from the Favorite field.

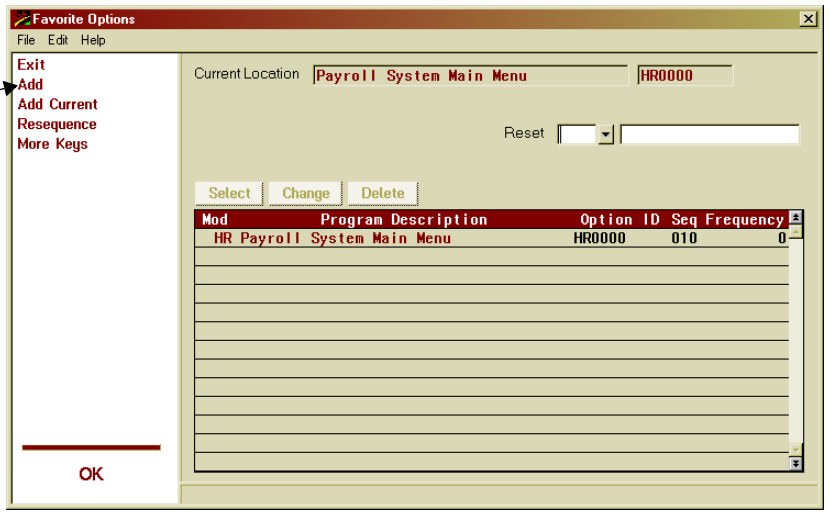
NOTE

These programs already will be set up when the software is installed. If you have custom programs that require changes to these programs, we strongly suggest that you contact New World Systems for assistance. ***Changing available options may render the programs inoperable****.*

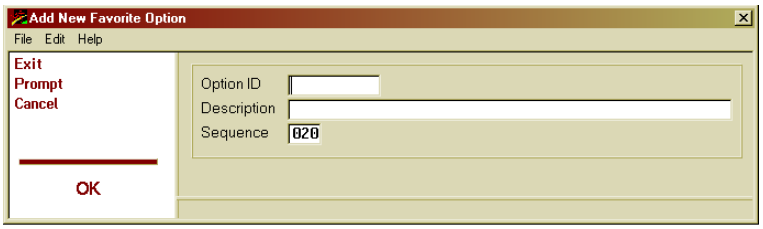
User Setup

Once users are set up in Security, they or their administrator will need to set up their list of favorite options. To do so, go to any screen that has the ***Favorite*** field, and select the prompt option. You will see a screen like the following:

To add favorites, click **Add**.



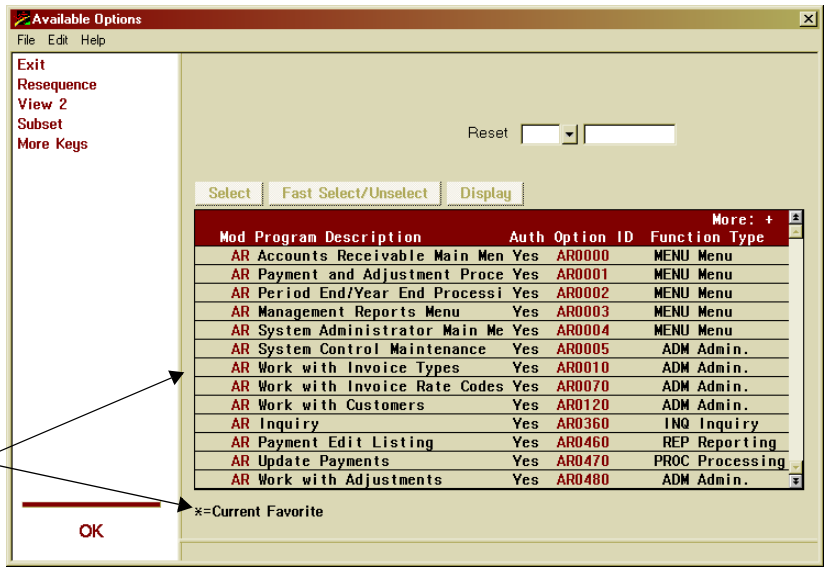
Favorites need to be added to this screen. Select the **Add** option (**F6**). You will see a screen like the following:



Field	Description
Option ID	**This field is mandatory.** Type the program name or use the prompt feature to select the program name. If you select the prompt option, it will bring up the *Available Options* screen. Select the program you want to add and click **OK**.
Description	**This field is mandatory.** If you used the prompt to populate the previous field, this field will also be populated; the value can be changed if you wish. If not, type a description for the favorite, or press **Enter** once and the system will supply it. This value is what you will see when you prompt to select a favorite menu. This field may contain 50 characters.
Sequence	This number indicates the order in which this item will appear in the list. The next sequence number to be used (items are numbered in multiples of ten) will be displayed here. Use the **Resequence** option on the *Favorite Options* screen if you need to change the order of the programs.

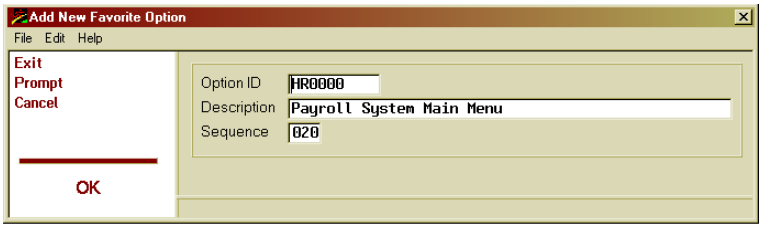
Complete the fields and click **OK**. The *Add New Favorite Option* screen will clear to enable you to add another entry. If you use the prompt (**F4**) a second time on the ***Option ID*** field, you may see the program(s) you previously added marked with an asterisk (*) as on the screen below:

An asterisk (*) will be displayed to the left of any programs that already have been added to the list of favorites.



The asterisk indicates that the program has already been added to the list of favorites. You also may select the **Fast Select/Unselect** (**2**) option for any program on this screen; it will add the program to your favorites list, and the system will remain on this screen so that additional programs may be selected in this way. When you are finished adding entries, select the **Exit** (**F3**) or **Cancel** (**F12**) options to leave this screen.

This feature also includes a quick way to add the current menu to your list of favorites. If you decide to add a menu option while you are on that menu, select the prompt from the ***Favorite*** field. Then select the **Add Current** option (**F8**). You will see a screen like the following:



The details for the menu option already are provided. Click **OK** to add it to your list.

Dynamic Menu Update

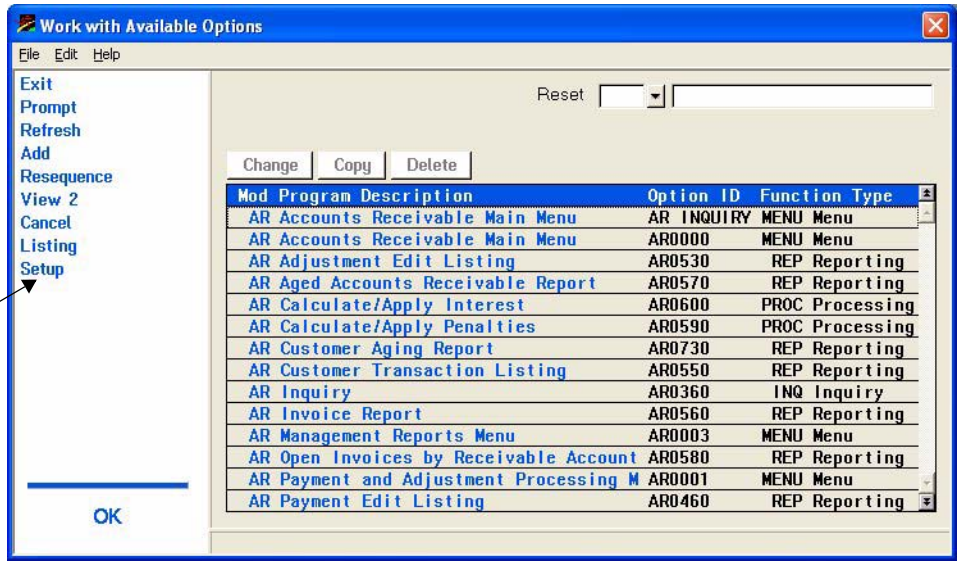
Dynamic menu options that contain direct calls to application menus or menu options that use the new Favorite feature require updating in *Dynamic Menu Maintenance*. A procedure was included in the 6.0 update to make this change. You will need to run this procedure unless all of your calls on your dynamic menus are to application main menus only (menus ending in 0000).

1. Go to the *System Administrator Menu* for the module you want to update. Select the **Security** (**F20**) option. You will see a screen like the following:



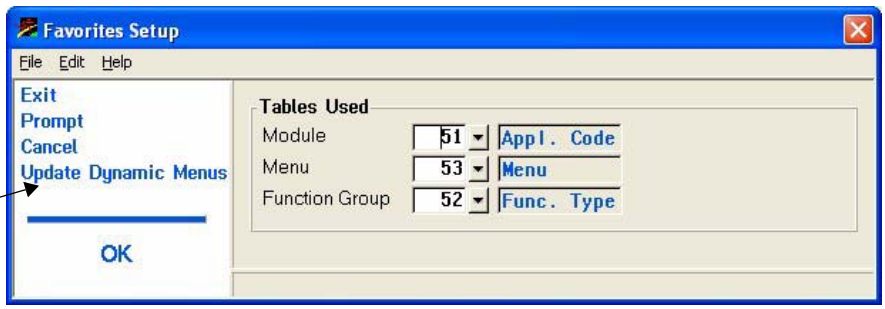
Select *Work with Available Options*.

2. Select *Work with Available Options*. You will see a screen like the following:



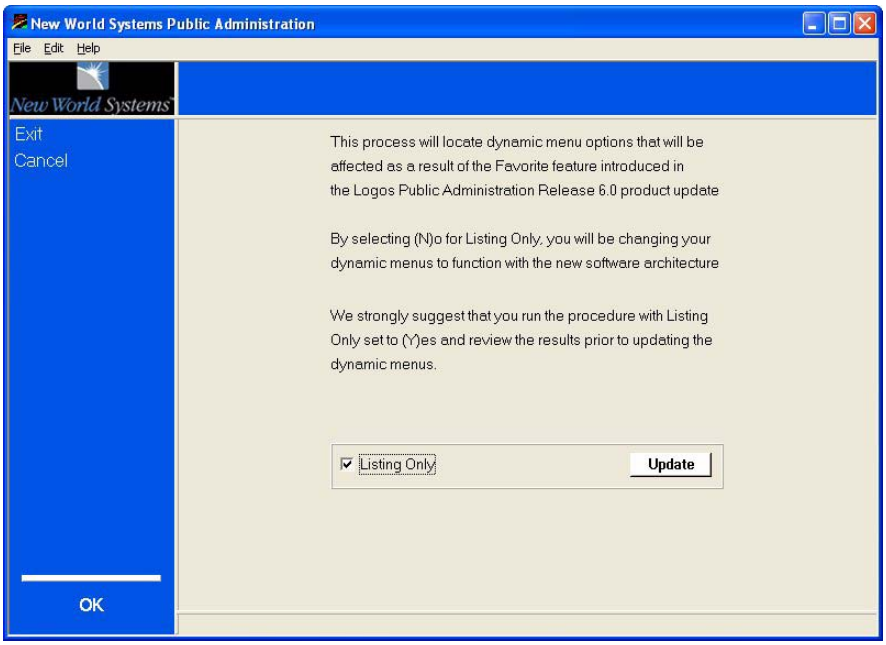
Select **Setup**.

3. Select the **Setup** (**F20**) option. You will see a screen like the following:

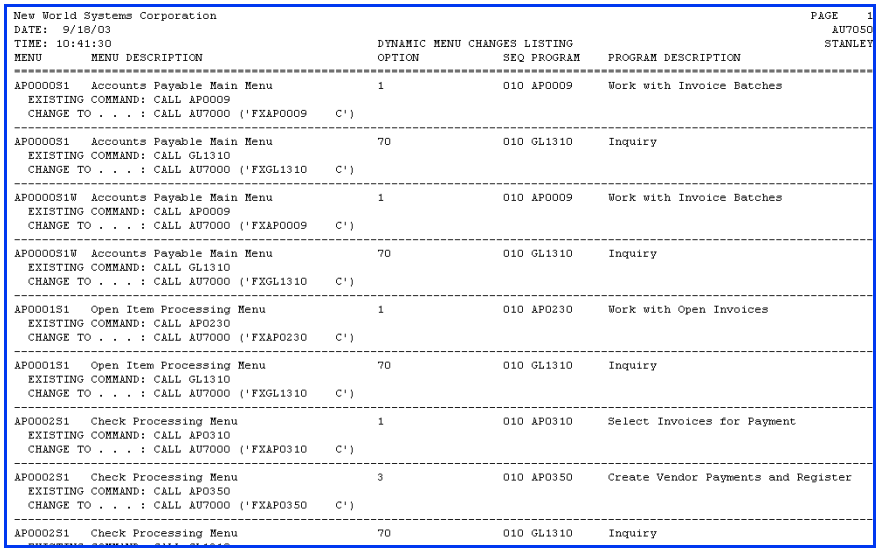


Select **Update Dynamic Menus**.

4. Select the **Update Dynamic Menus** (**F20**) option. You will see a screen like the following:



5. This procedure produces the "Dynamic Menu Changes Listing." Leave ***Listing Only*** selected and run the report. From a menu, go to *System Services* (**80**), **Work with Submitted Jobs** (**2**) to view the results. The report output will resemble the following:

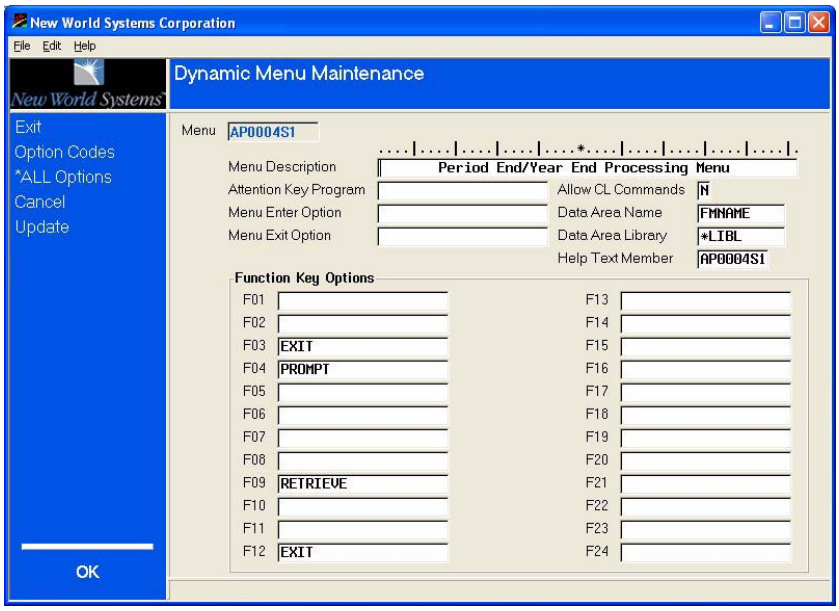


```
New World Systems Corporation                                                                                    PAGE    1
DATE:  9/18/03                                                                                                  AU7050
TIME: 10:41:30                          DYNAMIC MENU CHANGES LISTING                                            STANLEY
MENU          MENU DESCRIPTION          OPTION          SEQ PROGRAM    PROGRAM DESCRIPTION
================================================================================================================================
AP0000S1   Accounts Payable Main Menu   1               010 AP0009     Work with Invoice Batches
  EXISTING COMMAND: CALL AP0009
  CHANGE TO . . . : CALL AU7000 ('FXAP0009    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0000S1   Accounts Payable Main Menu   70              010 GL1310     Inquiry
  EXISTING COMMAND: CALL GL1310
  CHANGE TO . . . : CALL AU7000 ('FXGL1310    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0000S1W  Accounts Payable Main Menu   1               010 AP0009     Work with Invoice Batches
  EXISTING COMMAND: CALL AP0009
  CHANGE TO . . . : CALL AU7000 ('FXAP0009    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0000S1W  Accounts Payable Main Menu   70              010 GL1310     Inquiry
  EXISTING COMMAND: CALL GL1310
  CHANGE TO . . . : CALL AU7000 ('FXGL1310    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0001S1   Open Item Processing Menu    1               010 AP0230     Work with Open Invoices
  EXISTING COMMAND: CALL AP0230
  CHANGE TO . . . : CALL AU7000 ('FXAP0230    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0001S1   Open Item Processing Menu    70              010 GL1310     Inquiry
  EXISTING COMMAND: CALL GL1310
  CHANGE TO . . . : CALL AU7000 ('FXGL1310    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0002S1   Check Processing Menu        1               010 AP0310     Select Invoices for Payment
  EXISTING COMMAND: CALL AP0310
  CHANGE TO . . . : CALL AU7000 ('FXAP0310    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0002S1   Check Processing Menu        3               010 AP0350     Create Vendor Payments and Register
  EXISTING COMMAND: CALL AP0350
  CHANGE TO . . . : CALL AU7000 ('FXAP0350    C')
--------------------------------------------------------------------------------------------------------------------------------
AP0002S1   Check Processing Menu        70              010 GL1310     Inquiry
```

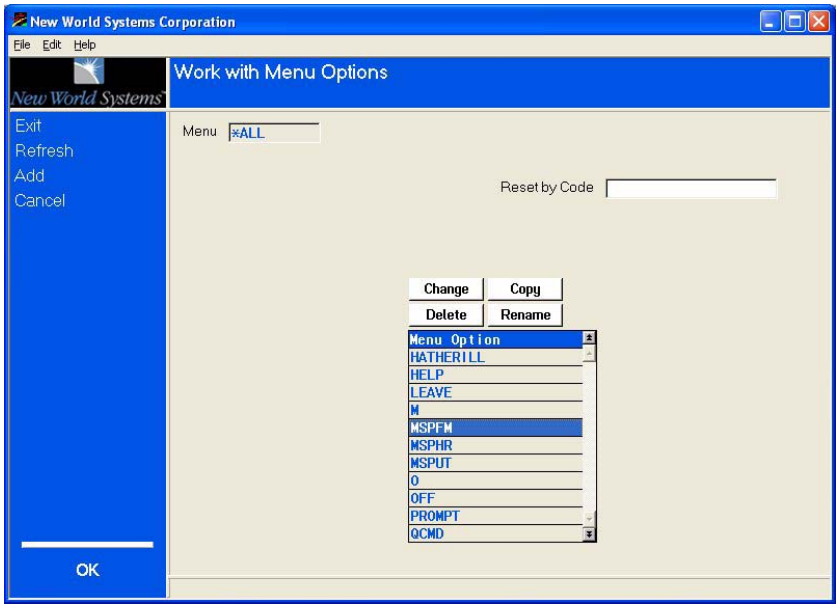
6. Review the report results to make sure you want the update to affect all of the menus listed there. If the list looks correct, run the procedure again with ***Listing Only*** deselected.
7. This procedure can also be run manually, if necessary. The report you generated in Step 5 contains the information necessary to set the correct call up on a menu.

8. Go to the *Work with Menus* screen. Select the menu you need to update, and click **Change**. (The menu is the entry in the **Program** column of the "Dynamic Menu Changes Listing.") The first *Dynamic Menu Maintenance* screen will be displayed:

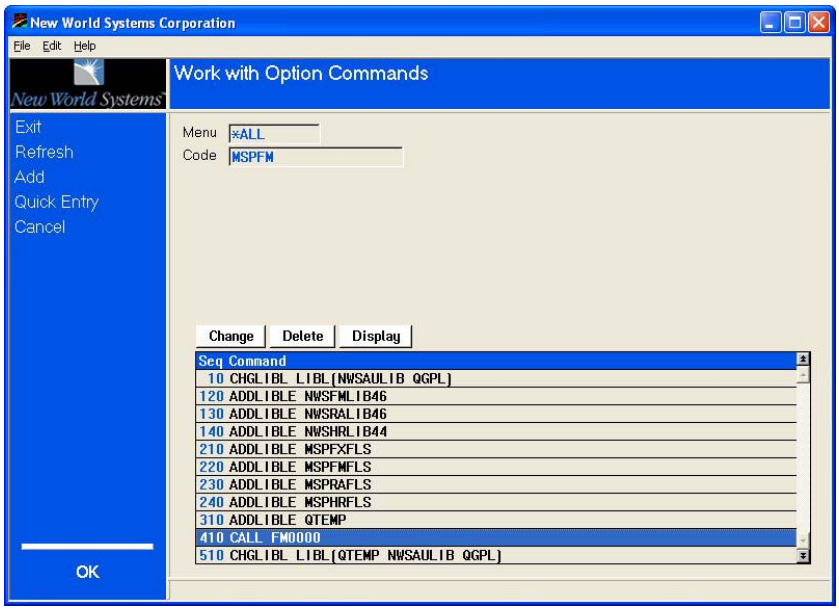
Click ***ALL Options**.



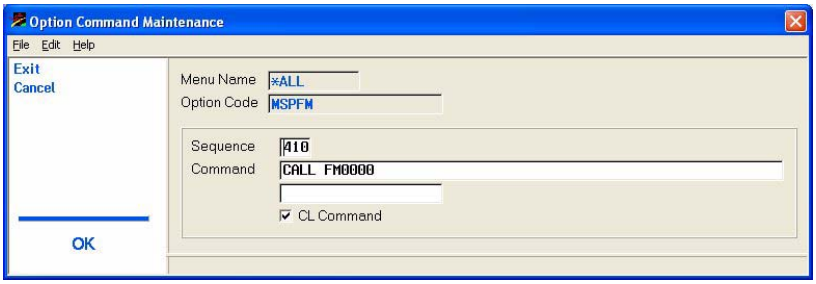
9. Click the ***ALL Options** button. You will see a screen like the following:



10. Use the **Option** column on the report to determine which option will need to have its call command changed. Select the option, and click **Change**. You will see a screen like the following:



11. Use the **Sequence** column value from the report to select the existing call command in the list, and click **Change**. The call will be displayed on the *Option Command Maintenance* screen:



12. Change the command to be formatted like the Change To information on the report. In our example above, the new command would look like the following:

```
CALL AU7000 ('FXPU1060     C')
```

NOTE

*The program number is allowed ten spaces. The characters 'FX are **not** part of the program number. If, as in the example above, the program number uses fewer than ten spaces, insert spaces to total ten before typing the final characters in the command.*

13. Click **OK**. The call command has now changed. Repeat as needed for any other menus.

Appendix A
Application Utilities Security Table

Depending on the products licensed by your agency and the state compliance programs for your state, you will need to determine the security for each user on your system. Until security has been added to your user profiles, these functions will not be available when security is on.

The functions available for each program are marked with an X.

Program	Description	Add	Change	Delete	Inquire	Unlock	Window
AUHELP	User Defined Help		X				
AU0001	Security Menu				X		
AU0400	Work with Distribution Codes				X		
AU0410	Work with Distribution Code Detail File				X		X
AU0420	Distribution Code Detail File Maintenance	X	X	X	X		X
AU0430S	Print Distribution Codes-Submit Job				X		
AU0440	Distribution Code Header Records File Maintenance	X	X	X	X		X
AU0450	Distribution Code Prompt				X		X
AU0460	Work with General Ledger Descriptions				X		
AU0465	Disbursement Information Maintenance	X	X	X	X		X
AU0470	General Ledger Maintenance	X	X	X	X		X
AU0480	General Ledger Prompt				X		X
AU0490S	General Ledger Descriptions Listing-Submit Job				X		X
AU0500	Work with Passwords				X		
AU0510	Password Master File Maintenance	X	X	X			X
AU0520	Work with Banks/Check Validations				X		
AU0530	Bank/Check Validation Master File Maintenance	X	X	X	X		X
AU0535S	Bank Code Master File Listing				X		X

Program	Description	Add	Change	Delete	Inquire	Unlock	Window
AU0540	Work with Revenue Collection Stations				X		
AU0550	Revenue Collection Station File Maintenance	X	X	X	X		X
AU0570	Bank Code Prompt				X		X
AU0580	Revenue Station Prompt				X		X
AU0610	Work with Variable Distribution File				X		X
AU0620	Variable Distribution File Maintenance	X	X	X	X		X
AU0750	Work with On-Line Glossary				X		
AU0760	On-Line Glossary Maintenance	X	X	X	X		X
AU2006	Add Table Entry	X					
AU2350	Document Processing Set-Up File Maintenance				X		X
AU2351	Document Processing Set-Up Add/Change/Delete	X	X	X			X
AU2353S	Document Processing Control Listing				X		X
AU2355	Document Processing Control File Maintenance				X		
AU2356	Document Processing Control Add/Change/Delete	X	X	X			X
AU2358S	Document Processing Control Listing				X		X
AU2360	Document Processing Security File Maintenance	X	X	X	X		X
AU2365S	Print Document User Security Set-Up				X		X
AU2370	Document Processing Command File Maintenance	X	X	X	X		X
AU2375S	Document Processing Command File Print				X		X
AU2385	Document Processing Copy Command File	X					X
AU2398	Document Processing Driver Work with Documents				X		X
AU2610	Work with Security Authorizations-Original				X		
AU2615S	Security Violations Listing-Driver				X		X

Program	Description	Add	Change	Delete	Inquire	Unlock	Window
AU2620	User/Group Master File	X	X	X			X
AU2630	Copy Authorizations				X		X
AU2640	Work with Program Authorization				X		X
AU2650	Enter/Change Program Security	X	X	X			X
AU2665	Work with Authorized Devices				X		X
AU2670	Program Master File Maintenance	X	X	X			X
AU2675	Authorize Devices File Maintenance	X	X	X	X		X
AU2680S	Program Master File Listing				X		X
AU2695S	Purge Security Violations-Driver			X			X
AU2700CL	Security Toggle-CL					X	
AU2710S	User Security Authorization Listing				X		X
AU2720	General Review Date				X	X	
AU2725	Work with General Review History				X		
AU2730	Word Interface Set-Up with User				X		X
AU2740	Word Interface Set-Up Default WD Processor				X		X
AU2760	Find Target	X					X
AU2800	Work with Tables-with Sequence by Description				X		
AU2810	Change Table		X				X
AU2820	Delete Table			X			X
AU2830	Add Table	X					X
AU2840	Copy Table	X					X
AU2850	Work with Table Entries				X		X
AU2860S	Table Listing				X		X
AU2865S	Table Listing-Single Table				X		X
AU2870	Change Table Entry		X				X
AU2880	Delete Table Entry			X			X
AU2890	Add Table Entry	X					X
AU4000	Work with Report Defaults				X		
AU4005	Add/Change User Report Defaults		X				X
AU4010	Add/Change/Delete Report Defaults	X	X	X			X

Program	Description	Add	Change	Delete	Inquire	Unlock	Window
AU4020	Display Report Defaults				X		X
AU4030S	Report Defaults Listing				X		X
AU4040	Work with Distribution Codes				X		X
AU4050	Add/Change/Delete Distribution Codes	X	X	X			X
AU4070S	Distribution Code Listing				X		X
AU4080	Distribution Code Prompt				X		X
AU4090	Work with Group Users				X		X
AU4100	Add/Change/Delete Group Users	X	X	X			X
DP2300	Document Processing Work with Documents	X	X	X	X		
DP2300B	Work with Documents-Badge	X	X	X	X		
DP2300D	Work with Documents-Scanned Documents	X	X	X	X		
DP2300F	Work with Documents-Free Form	X	X	X	X		
DP2300M	Work with Documents-Mugshots	X	X	X	X		
DP2300O	Work with Documents-Office Vision	X	X	X	X		
DP2300S	Work with Documents-Snapshots	X	X	X	X		
DP2300W	Work with Documents-Word Processor	X	X	X	X		
DP2310	Document Processing Create Document	X					X
DP2312	Document Processing Rename Document		X				X
DP2315	Document Processing Delete Document			X			X
DP2317	Document Processing Finalize Document		X				X
DP2320	Document Processing Process Image Documents				X		
DP2325	Document Processing Create/Delete Image Documents	X		X			
DP2327	Photo Image Interface-Dsp Doc Info-Program				X		X
DP2330	Document Processing Process Office Documents		X		X		

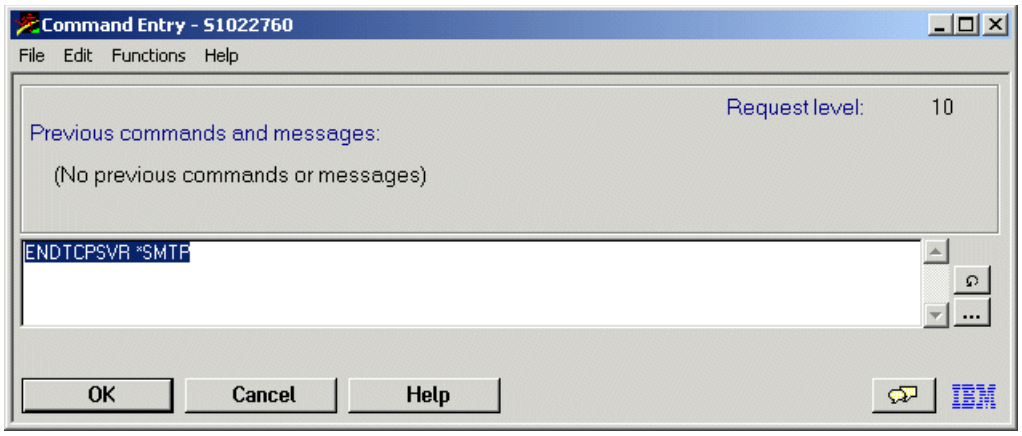
Program	Description	Add	Change	Delete	Inquire	Unlock	Window
DP2335	Document Processing Create/Delete/Finalize Office Documents	X	X	X			
DP2340	Document Processing Process Freeform Documents		X		X		
DP2345	Enter/Change Freeform Documents	X	X				X
DP2346	Document Processing View Free-Form Document				X		X
DP2347	Document Processing Change Authority		X				X
EP0000	Equipment Main Menu				X		
EP0100	Work with Equipment				X		
EP0110	Equipment Maintenance	X	X	X	X		
EP0120	Equipment Maintenance-Detail Information	X	X		X		
EP0130	Work with Reports				X		
EP0140	Equipment User Defined Info	X	X	X	X		
EP0150	Work with Equipment Activity				X		
EP1060	Equipment Activity	X	X	X	X		
EP0170	Equipment Activity Results Maintenance	X	X		X		
EP0900	Work with Equipment System Control				X		
EP0910	Equipment System Control Maintenance	X	X	X	X		
EQ0100	Work with Equipment				X		
FP0500	Work with Buildings				X		
FP0510	Building Maintenance	X	X	X	X		
FP0510C	Building Maintenance-Copy Mode	X					
FP0520	Work with Tanks				X		
FP0530	Tank Maintenance	X	X	X	X		
FP0540	Work with Sprinklers				X		
FP0550	Sprinkler Maintenance	X	X	X	X		
FP0560	Sprinkler Flow Maintenance	X	X	X	X		
FP0570	Work with Suppression Sources				X		

Program	Description	Add	Change	Delete	Inquire	Unlock	Window
FP0580	Suppression Sources Maintenance	X	X	X	X		
FP0600	Work with Auto Extinguishment Systems				X		
FP0610	Auto Extinguishment Maintenance	X	X	X	X		
FP0620	Work with Businesses				X		
FP0630	Business Maintenance (Move/Delete)		X	X			

Appendix B
Email Setup

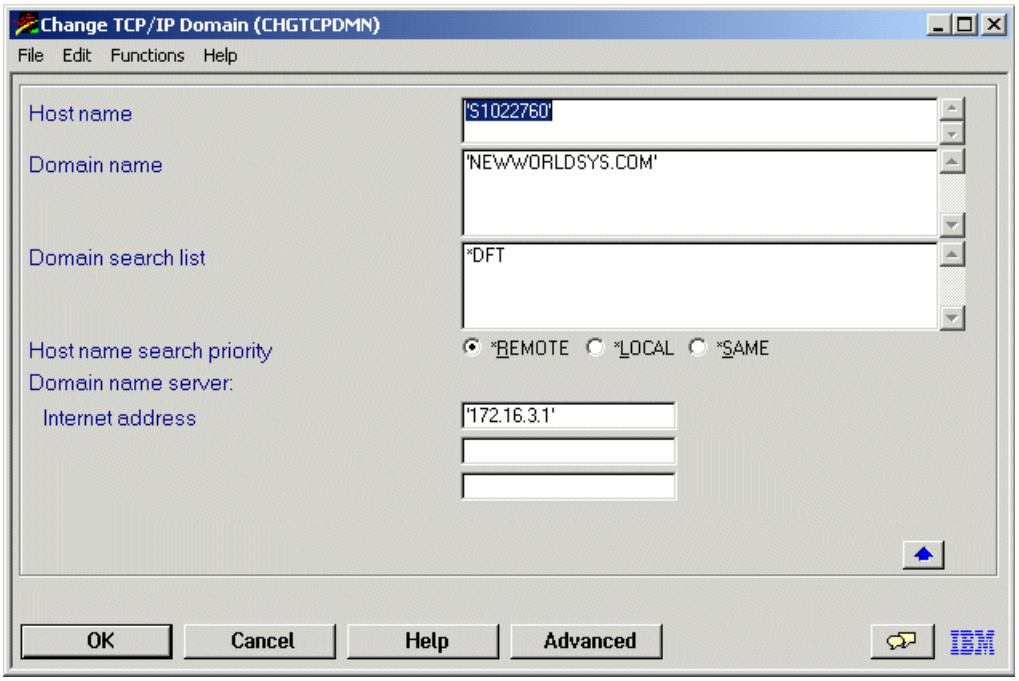
Follow these steps to set up email on the iSeries 400:

1. Sign on as QSECOFR.
2. End the mail server. On a command line, type **`ENDTCPSVR *SMTP`** as seen below:



   Click **OK** or press **<Enter>**.

3. Change the TCP/IP domain information. On a command line, type **`CHGTCPDMN`**; then click on the prompt button (the button to the right of the command line with three periods on it) or press **<F4>**. You will see a screen like the following:

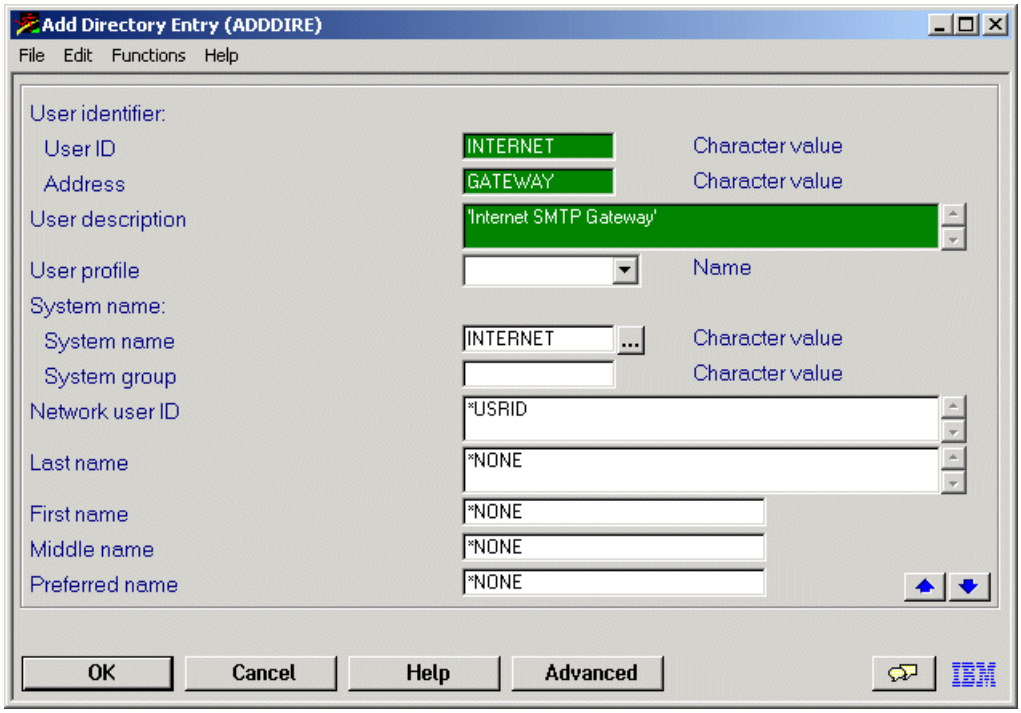


Complete the fields, remembering to put single quotes around each value as in the screen above:

Field	Value
Host Name	Type the name of your AS/400 in this field. This value may be a name or a number. Our example is using an AS/400 named S1022760.
Domain Name	Type the name of your email domain, such as NEWWORLDSYS.COM or CITYOFANYTOWN.COM. The characters that come after the "@" symbol in an email address comprise your domain name.
Domain Name Servers	Type the IP address of your domain name server. You can enter up to three servers. An example would be 123.45.6.789. The IP address is always a series of four numbers separated by periods, but the length of each number in the series can vary from one to three digits.

Click **OK** or press **<Enter>** for these values to take effect.

4. Define INTERNET as a directory entry. On a command line, type **ADDDIRE**. Click the prompt button or press **<F4>**. You will see a screen like the following:

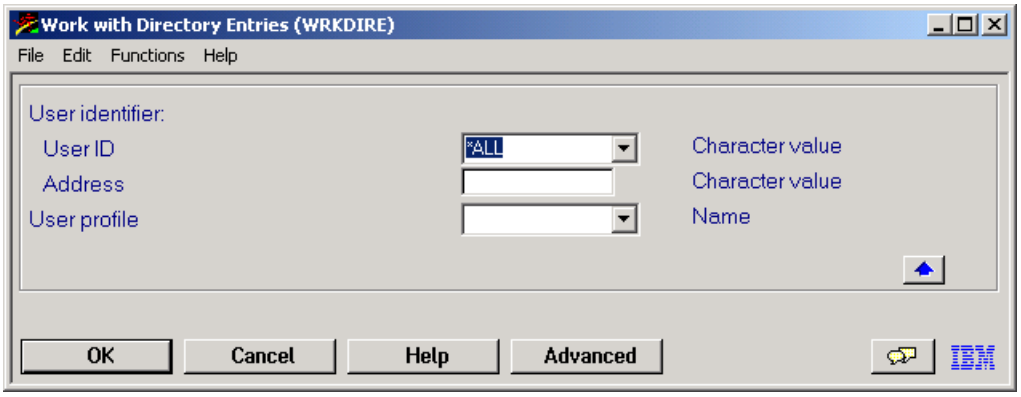


Complete the fields as follows:

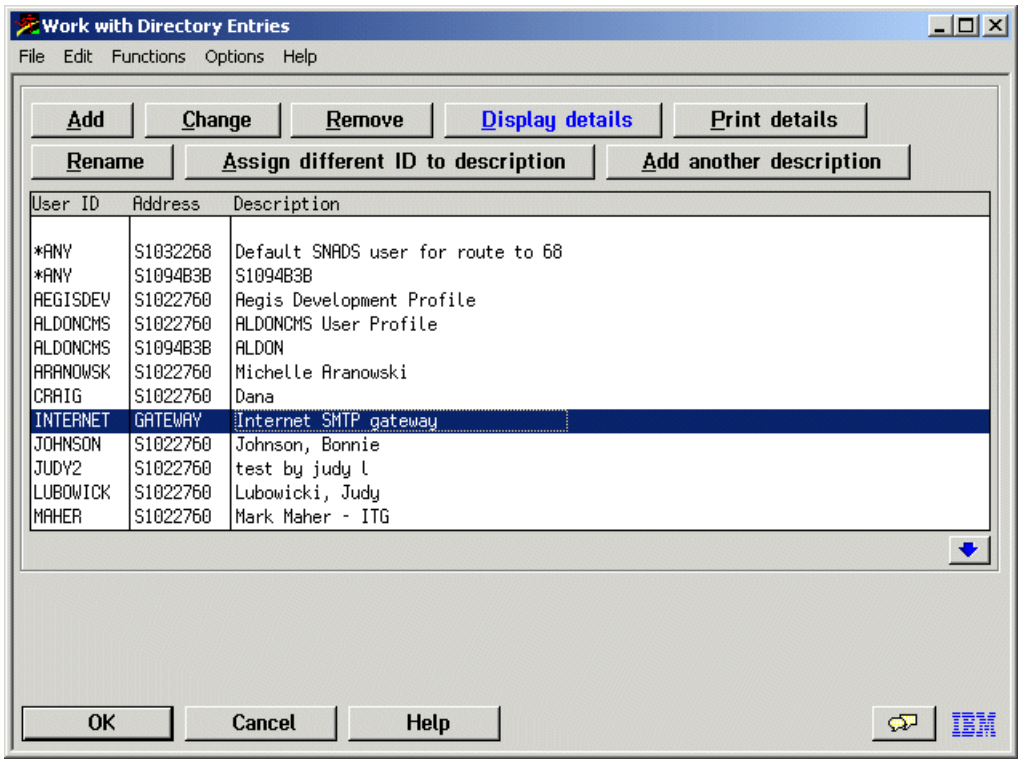
Field	Value
User ID	Type **INTERNET**.
Address	Type **GATEWAY**.
Description	Type **Internet SMTP Gateway**.
System Name	Type **INTERNET**.

a. Click **OK** or press **<Enter>**.

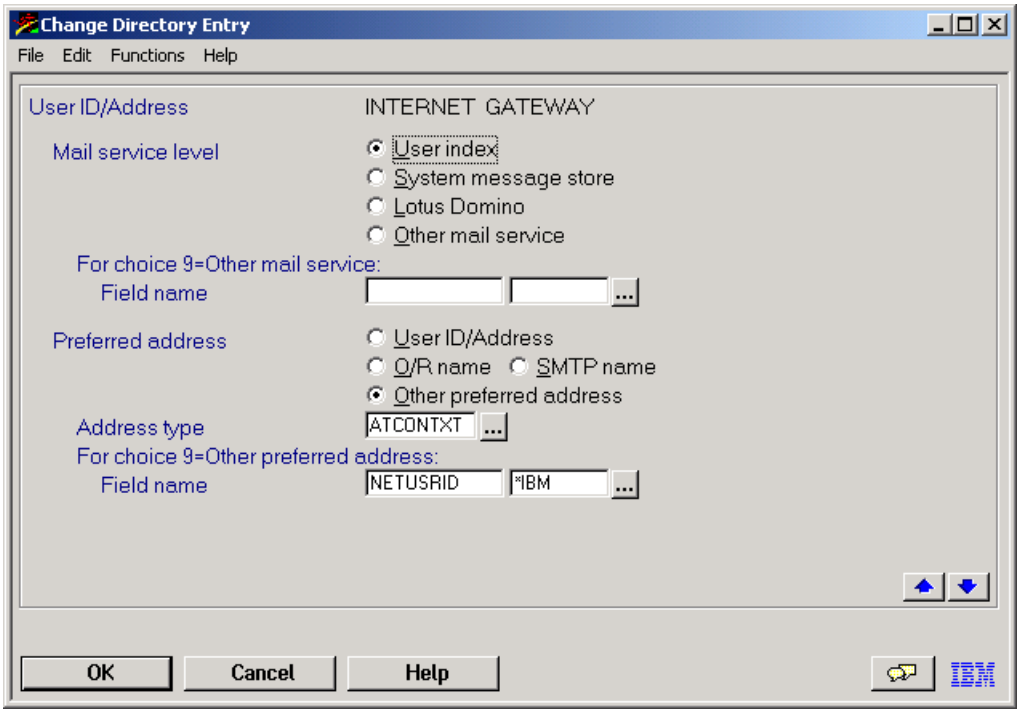
b. On a command line, type **WRKDIRE**. Click the Prompt button or press **<F4>**. You will see a screen like the following:



c. Click **OK**. You will see a screen like the following:



d. Click **Internet** and then the **Change** button. Click the down arrow or press **<Page Down>** until you see the following screen:

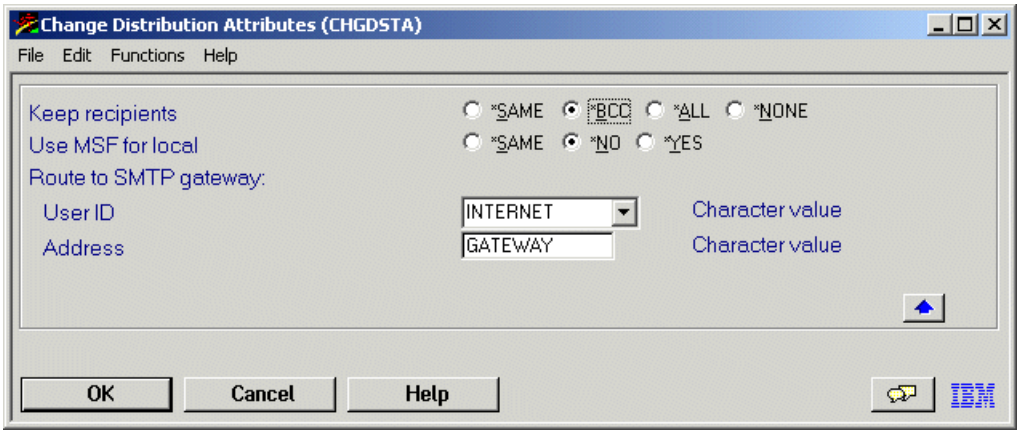


e. Make sure the fields below have the following values:

Field	Value
Address Type	Type **`ATCONTXT`**.
Preferred Address	Select the **Other Preferred Address** radio button.
Field Name (under Preferred Address)	Type **`NETUSRID`** in the first field, then **`*IBM`** in the second.

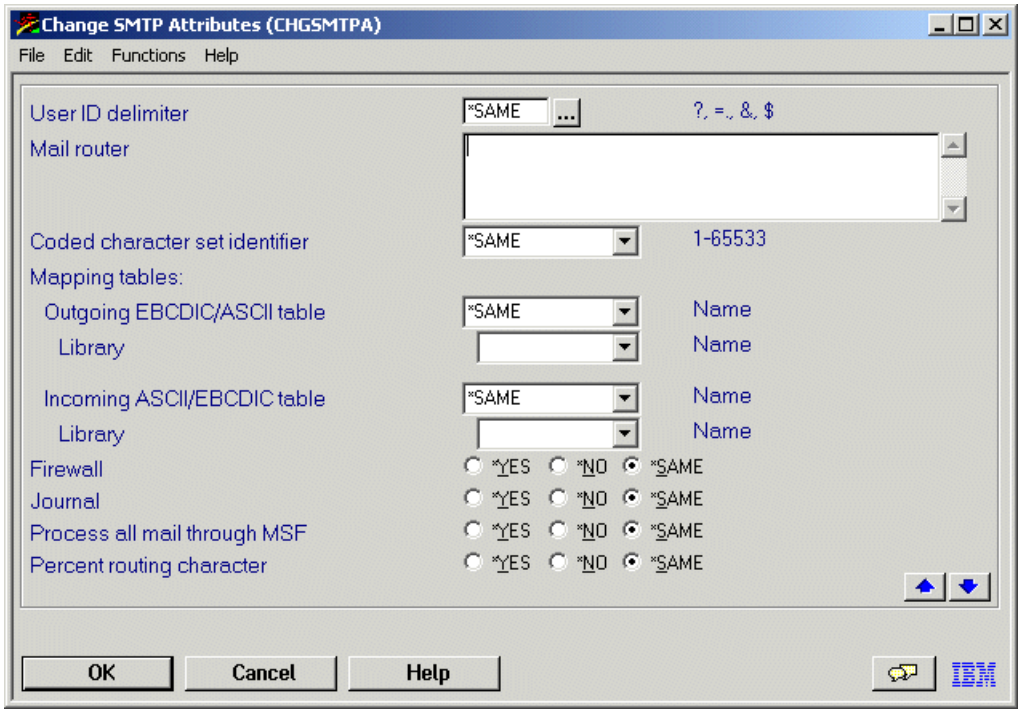
f. Click **OK** or press **<Enter>** for these changes to take effect.

5. Change the distribution attributes. On a command line, type **CHGDSTA**. Click the prompt button or press **<F4>**. You will see a screen like the following:



Complete the fields as shown in the screen above to specify the route to the SMTP gateway. Click **OK** or press **<Enter>** for your changes to take effect.

6. Change the SMTP attributes. On a command line, type **CHGSMTPA**. Click the prompt button or press **<F4>**. Page down until you see the following screen:

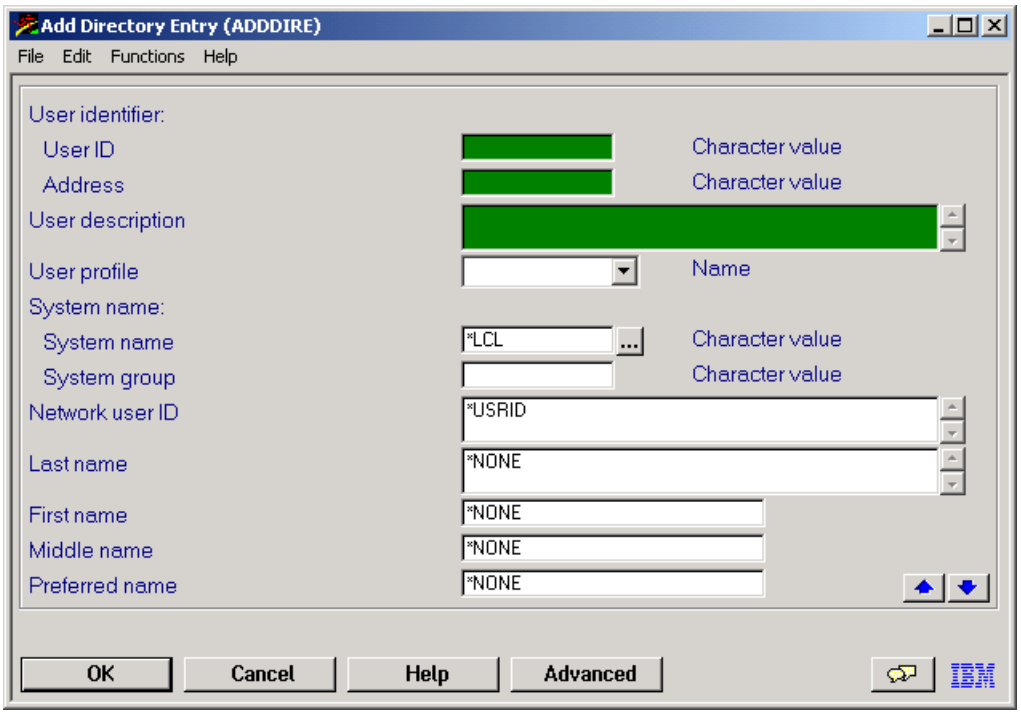


In the ***Mail Router*** field, type the name of your mail router. Enclose the value in single quotes. This could be a name, such as CITYMAIL.MYCITY.COM or an IP address, such as 999.99.999.9. Click **OK** or press **<Enter>**.

7. Start the mail server. On a command line, type **`STRTCPSVR *SMTP`**. Click **OK** or press **<Enter>**.

8. To use the correct return email address, you must modify the directory entry for the users. For each user that will be using email,

   a. Go to a command line and type **`ADDDIRE`**. Click the **Prompt** button or press **<F4>**. You will see a screen like the following:

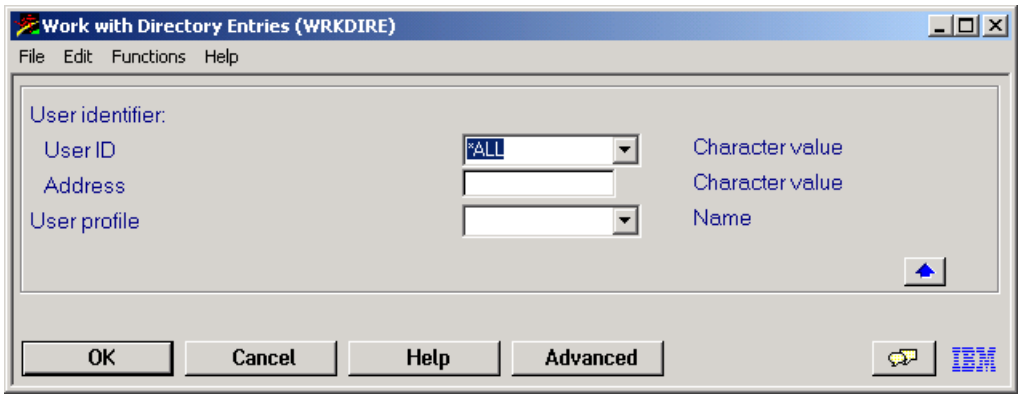


Complete the required fields as follows:

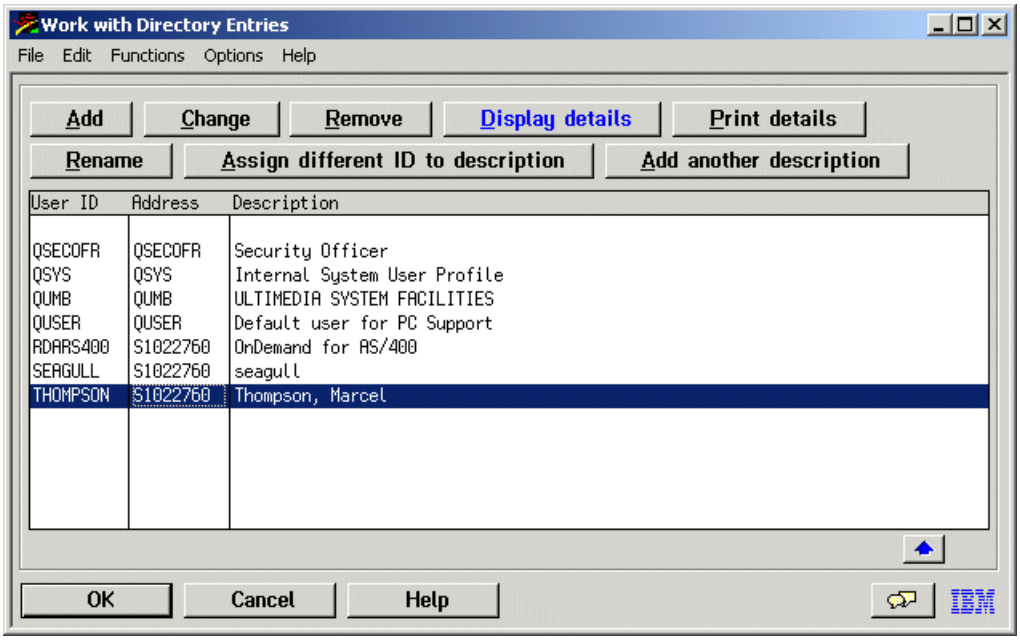
Field	Value
User ID	Type the ID of the user you want to have access to this option. **NOTE:** This field is limited to 8 characters.
Address	Type the machine name.
User Description	Type a brief description, generally the user's name.
User Profile	Type the profile for this user. This may be the same as the user ID; however, you can include 2 more characters in this field to further distinguish this user from others with similar names.

   b. Click **OK** or press **<Enter>**.

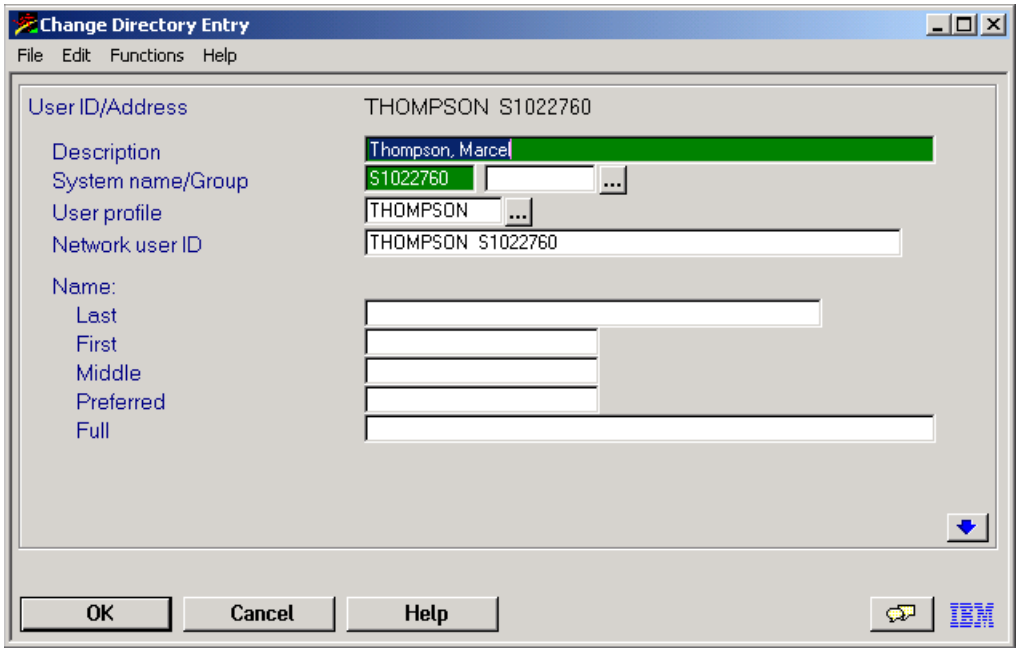
c. Go to a command line and type **WRKDIRE**. Click the **Prompt** button or press **<F4>**. You will see a screen like the following:



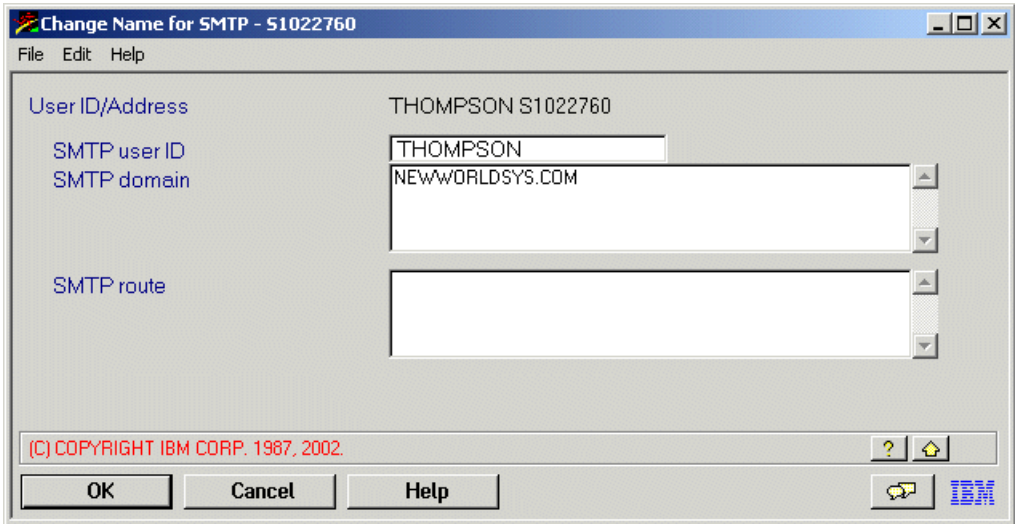
d. Click **OK** or press **<Enter>**. You will see a screen like the following:



e. You will get a list of your users. Click on the user you want to work with, then click the **Change** button. You will see a screen like the following:



9. At the top of the screen, click **Functions**, then **Change Name for SMTP**. You will see a screen like the following:



Your screen will be blank except for the User ID/Address at the top, which cannot be changed. Complete the other fields as follows:

Field	Value
SMTP user ID	Type the first part of the user's email address, up to the "@" symbol. In our example above, "THOMPSON" is the SMTP user ID.

Field	Value
SMTP domain	Type the second part of the email address, which is all of the characters that come after the "@" symbol. In our example above, NEWWORLDSYS.COM is the SMTP domain.
SMTP Route	Leave this field blank. We defined the SMTP route in Step 5 of the AS/400 setup.

With this setup, the return email address for all email generated by the user THOMPSON is thompson@newworldsys.com.

NOTE

*You will need to perform this step for **each** user.*

Setting up Spooled File Emailing

To set up the option to email spooled files, follow these steps:

1. To have an email address default into this program, add the following command to the ENTER option on your dynamic menu:

   CRTDTAARA QTEMP/AUSPLF *CHAR 256 'logoshelp@newworldsystems.com'

   Replace **logoshelp@newworldsystems.com** with the email address you want as the default.

NOTE

Before this change can take effect, the user must sign off and sign back on the system.

2. To set up the capability to send large email attachments, run the following command:

   CHGPOPA MSGSPLIT(*NOMAX)

   This command needs to be run only once; it does not need to be run each time an email with a large attachment is sent.

3. Run the following command to create an NWSEMAIL folder:

   CRTFLR FLR(NWSEMAIL)

   This command also needs to be run only once.

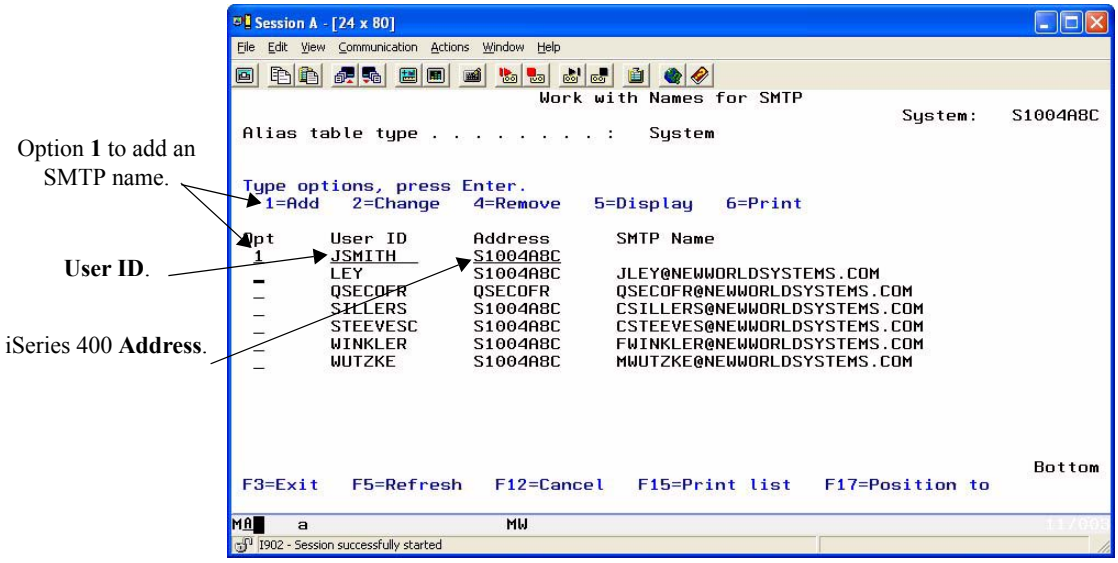
4. To set up the system so that, when you email a spooled file, the return email address will be your own, follow these steps:

> **NOTE**
>
> *You may need the security officer (**QSECOFR**) to perform this part of the setup.*

On a command line, type the following command:

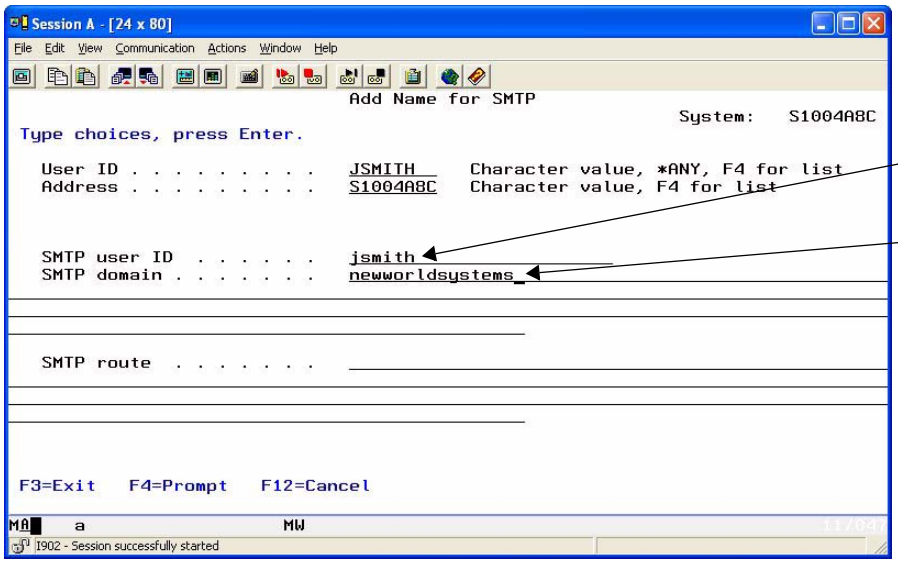
WRKNAMSMTP TBLTYPE(*SYSTEM)

The *Work with Names for SMTP* screen will be displayed:



Use the **Add** option (**1**) to add a **User ID** and iSeries 400 **Address** (System Name, ex. S1004A8C).

Press **<Enter>**. The *Add Name for SMTP* screen will be displayed:



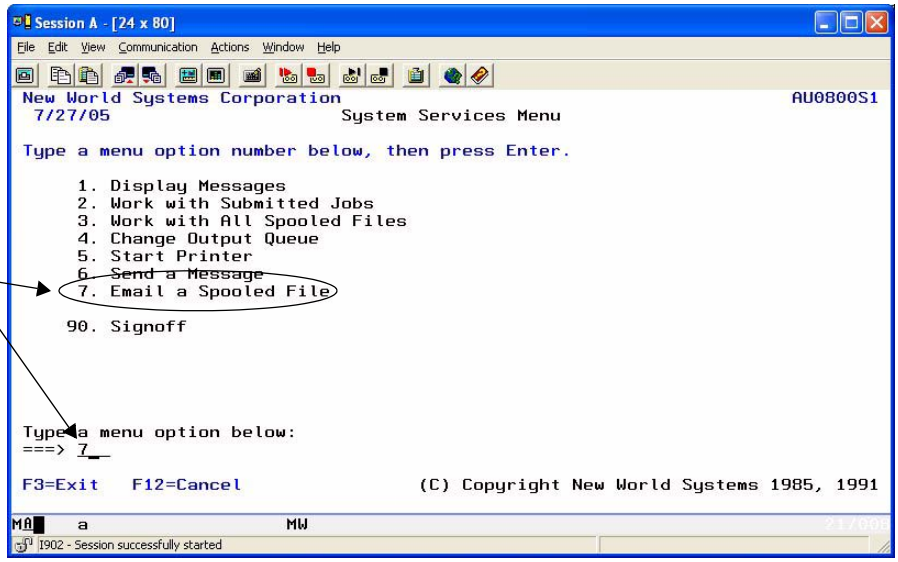
In the ***SMTP user ID*** field, type the first part of your email address (ex. jsmith). In the ***SMTP domain*** field, type the last part of your email address (ex. newworldsystems).

Press **<Enter>**. The *Work with Names for SMTP* screen will be re-displayed, with the new SMTP name added to the list.

Sending a Spooled File by Email

Once you have set up the new emailing feature, follow these steps to send a spooled file by email:

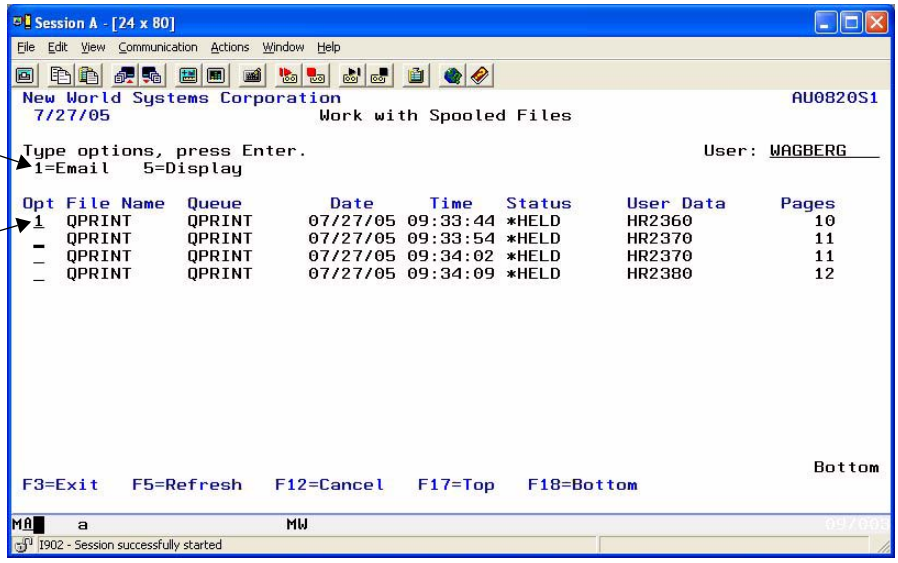
1. From a main menu, select *System Services Menu* (option 80). The following screen will be displayed:



2. Select *Email a Spooled File* (option 7), and press **<Enter>**. The *Work with Spooled Files* screen will be displayed:

New *Email* option (**1**).

Select a spooled file with the *Email* option.

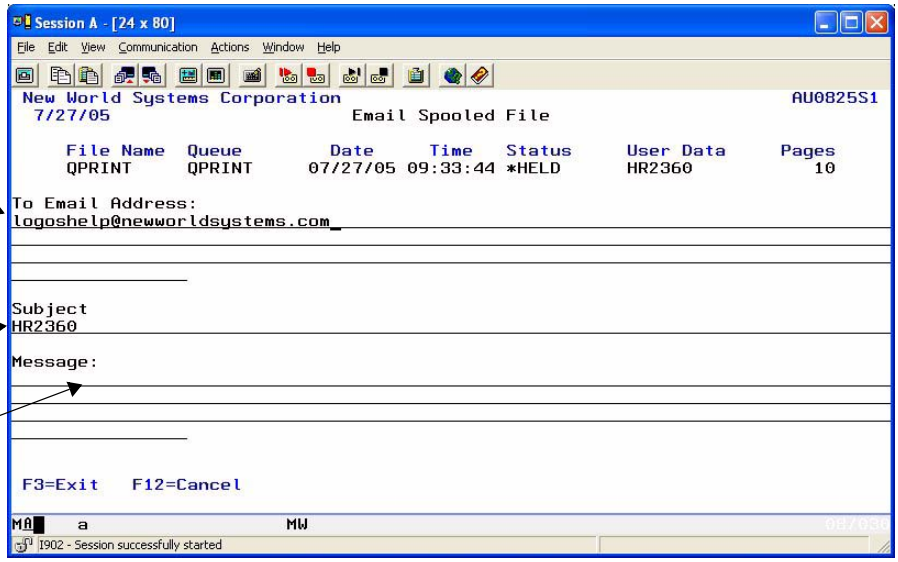


3. To email a spooled file, select it with option **1** (Email), and press **<Enter>**.The *Email Spooled File* screen will be displayed:

To Email Address (recipient of the spooled file).

Name of the spooled file to be attached to email as .TXT file.

Optional message may be attached to file.



4. The spooled file you selected to send will be displayed in the ***Subject*** field. This entry is required. In the ***To Email Address*** field, enter the email address of the recipient of the spooled file. This entry also is required. Use the ***Message*** field to attach a message to the file. This entry is optional.

5. After making your entries, press **<Enter>**. The spooled file will be sent to the recipient as a .TXT attachment.

NOTE

If authorized, you may change the current user to access other spooled files.

NOTE

Important: *Before installing PTF 6.011, make sure your spooled files are properly secured.*

Index

A

Abbreviation 60
Add 4, 7, 92, 93
Add Current 97
Add User 66
Add/Change
Distribution Codes 92
Document Processing Control 75
Document Set-Up File 77
Program Security 70
Report Defaults 90
Table 56
User 93
Adding 53
Adding table entries during prompting 53
Additional Folder 78
Allow CL Commands 39
Alternate 60
Applications 64
Attention Key Program 39
Attn key 38
attribute characters, table of 41
Attribute Mode 41
Authorities 70
Authority 85
Authority Level 78
Authority Level Code Security 74
Available Options 95

B

Backward 7
base report defaults 89
Border Characteristics 70
buttons 2

C

Cancel and Exit 6
Change 4, 60, 86
Change Authority 86
Change Entry 60
Character 70
check box 8
CL Command 44
Closed Record Access 67
Color 70
Command 80
Command File 80
Command Key Options 39
Control 77
Control File Listing 77
Copy 5
Authorization 67
Menu 37
Option Code 46
Table 56
User 50
Create 85
Create Document 85

D

Data Area Libr 39
Data Area Name 39
data entry fields 9
promptable 9
required 9
validated 10
date fields 10
Date Prompt 10
Default Court Operator 67
Default Document 78
Default Folder Path 78

Delete 4
Document Processing Control 76
Document Set-Up File 79
Entry 60, 79
Table 58
User/Group Master File 68
Description 60, 76
Description, Favorite 96
Device Security 64
Display 4, 91
display report defaults 91
Distribution Group 91
Document 74, 80, 83
document authority and security 74
document control files 73
Document Processing 73
Document Processing Command File Maintenance 80
Document Types 83
Dynamic Menu
options 35
screens flowchart 36
setup 25
Dynamic Menu Maintenance 38
Dynamic Menu Processing 25
Dynamic Menu update for Favorite 97
DYNMAIN 25

E

Edit DYNMAIN Screen 29
Edit Library List 25
Existing ORI Number 68
Existing User 67
Exit and Cancel 6

F

F4=Prompt 54
Fast Select/Unselect 97
Favorite 12
Favorite Description 96
Favorite Option ID 96
Favorite Sequence 96
Favorite Setup 96
File Name 76
Free 85
Free-Form Document 85
From Code 46, 47
Full Exit 17
function key tasks 6
Function Key Text 40
functions, other standard 8

G

Group 66
Group User ID 66
GUI borders 63

H

help text
exiting 22
field-level 22
member 39
overview 21
scrolling 22
update 23
user-defined 23
Help Text Index 23
Help Text Processing 21
Hold Report 91
Home ORI # 67

I

Include Set-Up 77
Individual 66
informational fields 10
Initial Menu 48, 49
Inquiry 2

J

Jurisdiction Prompt 69
Juvenile Access 67

L

Length 76

M

Maintainable 89
Menu 42, 50, 51
Menu Code File Maintenance 42
Menu Code Maintenance 42
Menu Description 38
Menu Enter Option 39
Menu Exit Option 39
Menu Master File Listing 50
Menu Name 37, 49
Menu User File Listing 51
Menu User File Maintenance 48
menus 1
Move function 24
My Tasks 2

N

New Authority Level 86
New User 67

O

Officer Access 67
OK (Enter) 8
online help text 21
Option 44, 80
Option Code 44
option code
    copying 46
    renaming 46
Option Code Maintenance 42, 100
Option Command Maintenance 44
Option ID, Favorite 96
options, standardized 2
ORI Number 68
ORI# 78
Output Queue 91

P

phone numbers 10
Photo Image Folder 78
Print 5, 8
Print Header 91
Print List 68
print table 58
Profile Type 66
Program Group 67
Program-Level Security Authorization 53
Prompt 6, 54
promptable fields 9
Prompting 54
prompting 54

Q

QCMD 39
QEZMAIN 39
Quick Entry 45
QUSCMDLN 39

R

radio set 8
Refresh 7
Rename 86
Rename Document 86
Rename Option Code 46
report attributes 89
Report Defaults 7, 89
    base 89
    user 89
required fields 9
Resequence 7
Reset 54, 56
Retain Entries 91
Reverse Image 71
Rsq by 54

S

Screen 90
Screen Defaults 90
Screen Text 40
Scroll Bar 8
Search line function 23
Security 55, 71
Security Authorizations 63
Security Toggle Verification 71
Sequence Number 26
Sequence, Favorite 96
Set 73
Set up DYNMAIN Option 2, Work with Users 31
Set-Up File 77
Signoff 2
Software Basics 1
standardized options 2
Starting Position 76
Sub-Folder 79
SysRq 38
System Services 2

T

Tab 8
Table 53, 61
table
- *abbreviation* 60
- *alternate* 60
- *code* 53
- *description* 60
- *entries* 59
- *entry* 53

table entries, adding during prompting 53
Table Entry Processing 53
Table Listing 61
Table Master Processing 53
Table# 76
tables and table codes 11
time fields 10
To Code 46, 47
To Menu 46, 47
Type 76, 80

U

Unlock 70
Update Dynamic Menus for Favorite 98
Use 68
User 54, 66, 68, 89
User ID 66
User Report Defaults 89
User Security Authorization Listing 68
User/Group Master File 66, 68
user-defined table processing 54

V

validated fields 10

W

wildcard searches 13
Word Interface Document Security 74
Word Process Folder 78
Work 36, 48, 84, 90, 91
Work with
- *Application Programs* 64
- *Distribution Codes* 91
- *Document Processing Control Screens Flowchart* 82
- *Document Processing Set-Up File* 77
- *Document User Security Set-Up* 80
- *Documents* 84
- *Documents Screens Flowchart* 87
- *Menu Options* 42
- *Menus* 35, 36
- *Program Authorization* 69
- *Report Defaults* 90
- *Report Defaults Screens Flowchart* 94
- *screens* 3
- *Security Authorizations* 65
- *Security Authorizations Flowchart* 72
- *Submitted Jobs* 99
- *Table Entries* 59
- *Tables* 55
- *Tables Flowchart* 61

Tasks 3
User Menus 48
user-defined documents or narrative 6
Users 35, 48
Work with Document Processing Control 73
Work with Documents 83
Work with Report Defaults 89
Work with Security Authorizations 63
Work with Tables 53