

Infor M3 Core Infrastructure & Technology User Guide

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About this guide

This guide describes how to perform user tasks in M3 CE Core. This document also describes related concepts and features.

Intended audience

This guide is for users and Infor consultants who are responsible for user tasks in M3 CE Core.

Prerequisite knowledge

To fully understand the information presented in this guide, you should must have knowledge and experience in navigating and using M3 Core Infrastructure and Technology.

Organization

This table describes the sections of this guide:

Chapter	Description
Overview	Contains concepts related to M3 CE Core user tasks and chapter descriptions.
Using M3 H5 Enterprise	Explains how to use HTML 5-based user interface for accessing work-related information and appli- cations from the M3 business system.
M3 Metadata Publisher User Tasks	Discusses how to use M3 Metadata Publisher (MDP) to explore M3-related metadata.
Hot keys	Explains how to use keyboard shortcuts.

Related documentation

See <u>docs.infor.com</u> for industry-specific information.

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Chapter 1: M3 H5 user tasks

M3 H5 provides an HTML 5-based user interface for accessing work-related information and applications from the M3 business system.

In M3 H5, you can run M3 programs under predefined workflows. You can also perform other tasks such as:

- Export records to spreadsheets.
- Work with Gantt Charts.
- Access User Documentation for M3 Business Engine.
- Work with different personalization tools for panels and programs.
- Communicate with the context applications of Infor Ming.le[™].

Opening M3 H5

M3 H5 can only be accessed through Infor Ming.le.

- **1** Sign in to Infor Ming.le.
- 2 Click the App Menu icon.

3 Select Infor M3.

Note: To avoid an error, there must only be one instance of M3 H5 running on a browser. M3 H5 opens with the application menu and the landing page:

Region	Description
Application menu	You can make these selections:
	 Favorites: contains favorite M3 programs defined by the user.
	 Administration Tools: provides access to tools and is available to administrators who maintain the H5.
	• M3 Transactions menu : categorized menu which provides access to M3 programs.
	You have the option to hide or show the selections by clicking the application menu.

Region	Description
Landing page	Shows the Favorites and Recent lists which provide quick ac- cess to the user's frequently used programs.
	This page also contains the company information, division in- formation, user ID, environment URL, and the current version of H5 installed in the environment.

Opening M3 programs using the search and start function

Search and start is both applicable to the classic and new H5 user interfaces.

- 1 In M3 H5, press Ctrl + R.
- 2 Specify the name or ID of the M3 program in the Search and Start dialog.For example, a specific name could be 'Item. Open' and the ID of this program is MMS001.
- 3 Press Enter or click OK.

You can also specify a keyword in the **Search and Start** dialog. After you press **Enter**, a list of possible matches is displayed. Select the item from the list that matches your criteria.

Note: In the new H5 UI, the list of matches will be displayed while typing a keyword in the Search and Start dialog. Available items from the Administration Tools, Mashup Library, Favorites, and Recent menu are included in the suggested matches.

The M3 program is displayed in a new tab where you can view or update records. The status bar shows the company or division information by default.

The taskbar shows currently opened M3 programs in tabs. You can click a tab to switch between opened programs.

Opening M3 programs using the application menu

- 1 In the application menu, expand an M3 transaction. For example, select SMS Sales and Marketing Automation > COP Customer Order Processing.
- 2 Click your preferred M3 program, for example 'Customer Order. Open'.

A new tab is created which displays the M3 program. The status bar shows the company or division information by default.

The task bar shows currently opened M3 programs in tabs. You can click a tab to switch between opened programs.

Opening M3 programs using startup

You can open programs quickly by pinning them directly to the taskbar.

- 1 Right-click a program tab.
- 2 Select Launch at Startup. When this feature is activated, a check mark is displayed beside this option.
- **3** Restart H5 for this setting to take effect.
- 4 Click the tab of the pinned program to open.

Closing M3 programs

Use any of the steps to close M3 programs individually:

- Click the **x** icon on the program tab.
- Right-click a program tab and click Close.
- In the menu of the opened M3 program, select Actions > Close.

To close all M3 programs, perform this procedure:

- 1 Right-click a program tab and select **Close All**.
- 2 To exclude the current program you are working on, right-click a program tab and click **Close Others**.

Displaying M3 programs simultaneously

Users can display M3 forms simultaneously by pairing tabs. You can only pair two program tabs but you can form several pairs simultaneously.

Pairing M3 program tabs

- 1 Open the M3 programs to pair.
- Click the program tab and drag over to the center section of another tab. Ensure that the tab where you can form a pair is highlighted with a blue transparent indicator.The dragged tab is positioned in the right of the tab pair by default.
- **3** The M3 programs are displayed simultaneously. Both program tabs are displayed in an active state.
- 4 By default, a paired tab is always formed in vertical split. To pair the M3 programs horizontally, access the context menu by right-clicking the tab header of a program and select **Split horizontally**.

Note: The context menu can only be accessed in an active paired tab.

5 Optionally, you can exchange the position of the programs whether in vertical or horizontal arrangement. Right-click the tab header and select **Exchange positions**.

Decoupling M3 program tabs

- 1 Click one of the tabs of an active tab pair.
- 2 Drag and move the tab to the preferred location. When you start the drag movement, the tab will automatically become a separate tab.
- 3 Release the tab to your new location.
 - a To place the tab to an empty space, drag the tab further beside another tab or to the edge section where a drop indication filled with blue highlight is displayed. The underlying tabs automatically create space for the dragged tab.
 - b To create a new pair formation, drag the tab over to the center section of another tab.
- 4 When released, the tab returns to its standard form or creates a new pair formation.

Changing the language of M3 H5

 To change the language of M3, update the user's language in the E panel of MNS150 then sign out of M3 H5. Sign in to M3 H5 again and check if the new language is displayed.
 Note: You can also use the Change option to directly change the language.

See creating a user to know the details on accessing the system language in the M3 Application Foundation User Guide.

- To switch the M3 language temporarily, use the LNG command. For example, to change the language to Swedish, press **Ctrl** + **R** and specify **LNGSE**.
- To display content in H5 based from the language used by Infor Ming.le, you must enable Use Infor Ming.le Language in the User settings.

See information about changing the site default language of Infor Ming.le in *Infor Ming.le User Guide*.

Note: UDI content is displayed only in English.

Signing out from M3 H5

- 1 Click your user ID on the top navigation panel and select **Sign Out**.
- 2 When a message is displayed, click **OK** or click **Leave this Page**.
- **3** To complete the sign out process, close the browser.

Panels

Panels guide the user on how to move through an M3 program. Each program has a predefined workflow, that is, by default, a program displays specific panels in a certain order. Although, the workflow of a current session may be modified by adding, deleting, or reordering the panels.

A panel is designated either by a letter or a number. A letter represents the type of information that is displayed in the panel. By contrast, a number indicates that a panel is associated with another program, but this panel can also be accessed from the program you are currently working with.

Panel let- ter assign- ment	Туре	Description
А	Entry	Used for specifying information, especially when object ID is known
		Serves as an opening panel for some programs
В	Browse	Shows records in the list view
		Serves as an opening panel for some programs
		User can expand or collapse the filter options to maximize the available space for viewing the records list
С	Сору	Panel is displayed when user is asked where to copy the record that is being duplicated
D	Delete	Panel is displayed when user is being asked to confirm the deletion of a record
E–N	Detail	Shows detailed information of records
		Use E panel as an opening panel for report orders
		Use F panel as an opening panel for document printouts
0	Output	Used for selecting the method for delivering the output of a record
		The available methods are mail, printer, fax,or file.
Р	Parame-	To access, go to Actions > Settings
	ter	Available when there are parameters to be set for a program
Т	Text	Where user can specify data that is related to a record
U	User	Reserved for Infor Partners and customer-specific modifications
V	User	Used for specifying the corresponding item type of an item number
		This panel applies only to M3 Business Engine 15.1.x

This table shows the panel types:

Setting the default panel sequence

Use this procedure to define the panel sequence that is displayed in a program by default. The available panels may vary depending on the selected program.

- 1 Open a program. The program must be in the opening panel.
- 2 Select Actions > Settings.
- 3 Specify this information. These fields are available for editing depending on the current program.

Opening panel

Select the panel that is displayed first when the program is started.

Panel sequence

- **a** Click the arrow to see the list of applicable panels.
- b Select a panel and click Add. Select and add panels in the preferred sequence.Optionally, you can clear the available sequence and add the panels that will show by default.You can add one panel at a time. Select in the order in which the panels will display.
- c Click Close from the panels list.
- 4 Click Next.
- **5** Verify that the panels follow the preferred sequence.

Moving through the panel sequence

Use this procedure for programs that display records in a list view and have a workflow with two or more panels.

- 1 Open a program.
- 2 Select a record from the list. A record must be selected to be able to move through the panel sequence of a program.
- **3** You can also view the panel sequence by performing any of these actions:
 - Double-click the record.
 - Press Enter.
 - Click the default option button.
 - Click the **Display** or **Change** icons from the menu bar.
 - Select display or change from the context menu of the selected record.

When a record is opened, all succeeding panels become active. You can click **Next** to move forward, or you can click an active panel to go to that panel.

4 To move back in the panel sequence, click **Previous** or click the previous panels.

Modifying the panel sequence

Use this procedure to modify the sequence of the panels through the panel navigator. Reordering the panels only applies to the current session.

- Open a program. The program must be in the B panel.
 Panel navigator is displayed only in the detail panels. Whereas, the dialog box for editing the panel navigator can only be accessed from the B panel.
- 2 From the menu bar, click **Panel Navigator**. The **Edit Panel Navigator** dialog box is displayed.
 - To reorder the panels, click **Direct Change**. Specify the new panel order and press Enter. You can access **Direct Change** immediately by pressing Ctrl+D.
 - To reorder panels manually, drag and drop the panels in the preferred sequence.
 - To add a panel to the current sequence, click Add Panel and select from the list.
 - To delete a panel, drag and drop the panel vertically from the sequence.

3 Click Save.

Note: The panels will return to the default standard sequence when you start a new session of the program.

Changing the panel view icons

Use this procedure to change how the panel navigator is displayed on the detail panels.

The panel navigator contains small, round icons which represent each panel in a program. To show the large view, with descriptions for each panel, you must clear the **Use small view for panel navigator** option.

- 1 Open a program. The program must be in the B panel.
- 2 Select Tools > User Settings or click the Panel Navigator to access the option.
- 3 Clear **Use small view for panel navigator**. The selected panel view remain in effect until you change it.

Copying bookmark links

- 1 Open a program.
- 2 In the opening panel, move the pointer to a blank area where you can right-click and select Bookmarks > Copy to clipboard. A bookmark URL that you can use to open the M3 program is copied.

Note: You can add the bookmark link in the shortcut panel of another M3 program. When adding the copied bookmark link in the **Target or URL** field, follow this format: mforms://<*bookmark URL*>. To add shortcuts, see <u>Adding shortcuts</u> on page 30.

Lists and records

Most M3 programs display a list of records. A record pertains to each individual entry in the B panel or list view. Each record is composed of a group of related fields that contain individual pieces of data. For example, in 'Item. Open' - MMS001/B, each item is considered a record, and each record includes data such as Item number, Status, Name, or Item group.

Displaying information in list panels

In some programs, you can select which data or fields are displayed in the B panel. To do this, a user selects the appropriate inquiry type in the Sorting order box. Each inquiry type returns a specific set of fields.

Some programs support a user-defined panel version. The panel version is a customized view where you can select the data or fields to be displayed in the B panel. For example, if you run a query in a program that contains 10 fields, you can customize your view to see only the fields you are interested in. If panel versions are supported, you will see a View box beside the Sorting order box. You can expand the View box and select a panel version from the list.

See Customizing list views on page 34.

Using the Advanced context menu options

The Advanced context menu contains two options: **Show Field Information** and **Copy Field Information**. The **Show Field Information** displays a new window with a text box that contains field information. The **Copy Field Information** copies the field information to the Windows clipboard.

Show Field Information

- 1 Open the form to view a field information.
- 2 Right-click a field such as a text box, combo box, or check box.
- 3 Click Advanced > Show Field Information. Information about the field is displayed in a new window.

Copy Field Information

- 1 Open the form where to copy the field information.
- 2 Right-click a field such as a text box, combo box, or check box.
- 3 Click Advanced > Copy Field Information. Information about the field becomes available in the Windows clipboard. You can paste the information in a text editor.

Note: The field information is different depending on the type of field and what is currently available. A list column and a list column position field will show a different set of data. The table and field names are usually only available on detail panel fields.

Search features

The user can perform a simple search by specifying a criteria in the **Search** field box. Records or rows that meet the criteria are displayed.

Other than the simple search, the users can perform the advanced search or use macros while searching. The save search query function saves search criteria or queries. This allows the user to search for similar instances.

These procedures are only applicable to list views where search is enabled.

Advanced search

- 1 Click Advanced Search. The Advanced Search input box is displayed.
- 2 In the Specific Keys section, select the keys to include in the Search.
 - To search text in one or several columns, select One or more of these keys.
 - To be more specific in your search, so that all columns are included, select **All of these** keys.
- 3 Specify your search criteria in the column fields.
- 4 Click Search.

Search using a macro

- 1 Open the list panel of the program where to perform the search.
- 2 Identify which column to base your search on and take note of the column ID.
- 3 Identify the macro that is applicable for your search criteria.

The types of macros that are supported in the search are date macros and user-related macros. You can also include variables in your search, such as *<USID>* for user ID or *<ITNO>* for field ID.

Specify the criteria in the search box. The criteria consists of the column ID and the macro.
 To find records that were created during a specific period of time, you can use date macros.
 Date macros include YEAR(x), MONTH(x), WEEK(x), and DATE(x), where (x) is any positive or

negative number that is relative to the current date.

If you want the list to be filtered against the Order Date column (column ID: ORDT), and to show only the records within the range covering from 30 days before the current date until the current date, use ORDT:[DATE(-30) TO DATE(0)].

Save search query

After performing a simple or advanced search, you have the option to save the search criteria or query.

- 1 Click the arrow beside the notification that shows the number of filtered hits for the search.
- 2 Click Save Search Query.
- 3 When the **Save Search** window is displayed, select one or both of these options to save the search query:
 - Add to Favorites: adds the search query to the Favorites menu
 - Save as Shortcut in the Toolbox Area: adds the search query to the collapsible Toolbox area

Positioning to a specific record

Positioning fields are input fields located under column labels.

- 1 In a positioning field, specify a keyword.
- 2 Press Enter. Records that closely match the keywords are listed first.

Creating a record

Use this procedure for programs that are used to create new records, for example, 'Item Type. Open' (CRS040) is used to create item types.

- 1 Open a program.
- 2 If the program opens in the B panel, specify values in the positioning fields. For example, in (CRS040), the positioning field is in the **ltp** column. Specify a value in this field.

If the program opens in the A panel, specify the values for the required fields.

- 3 Select Options > Create.
- 4 Complete the record with basic details.
- 5 Click Next.

When creating a new record, a program follows a predefined workflow. Specify the values in the required fields until the last Detail panel. If you go to the next panel but you missed a required field in the current panel, you are prompted to specify the information.

6 Optionally, to cancel the changes, select Actions > Cancel.

Caution: If you click **Refresh**, the information is not saved.

7 Verify that the new record is in the list.

Changing a record

Use this procedure to open a record in editable mode.

- 1 Open a program.
- 2 If the program opens in the B panel, select a record to edit. If the program opens in the A panel, specify the values for the required fields.
- 3 Select **Options > Change**.
- 4 Edit information in the fields.

If the record does not open in a detail panel, you can reorder the panel sequence so that the detail panels follow after the opening panel.

See <u>Setting the default panel sequence</u> on page 13.

- 5 To save the changes, click **Next**.
- 6 Optionally, to cancel the changes, select **Actions > Cancel**.

Caution: If you click Refresh, the information is not saved.

Copying a record

- 1 Open a program. The program must be in the A or B panel.
- 2 Select a record.
- 3 Select Options > Copy.
- 4 In the **browse** field, specify which record to apply the copied information.
- 5 Click Next.
- **6** Verify that the new record contains the copied information.

Deleting a record

- 1 Open a program. The program must be in the A or B panel.
- 2 Select a record.
- 3 Select **Options > Delete**.
- 4 When you are prompted to confirm, click **OK**.

Click **Previous** or select **Actions > Cancel** to cancel the deletion.

5 Click Next.

In some cases, deletion is not permitted because of data dependencies. For example, in 'Item. Open' (MMS001), deleting an item with a status of "00" is not permitted.

6 Verify that the deleted record is removed from the list. The deleted record is displayed as an unavailable row in the list panel.

Displaying a record from the records list

Use this procedure to open a record in a non-editable mode.

- 1 Open a program. The program must be in the B panel.
- 2 Select a record.
- 3 Select **Options > Display**.

The record opens in the Detail panel where fields are non-editable.

- 4 From the Detail panel, you can scroll to the previous or next record. For example, when you display a record in 'Item. Open' (MMS001), the program opens in panel MMS001/E.
 - a In the Item Number field, select Actions > Scroll Forward or Scroll Backward.
 - b When the program reaches the first or last record and you continuously scroll, a notification is displayed. The notification indicates that you scrolled past the first or last record in file.

Displaying a linked document or web page

Use this procedure to access the Infor Document Management documents or web pages that are linked to a specific record.

- 1 Open a program. The program must be in the B panel.
- 2 Right-click a record and select **Links**. Select either the Web link or the associated information to access.

Note: In iPad, the list of Links is available from the Options menu.

Populating browse fields

Use this procedure to populate browse fields by using the select command.

M3 programs are not always the same and may change based on the view definition. Browse fields are characterized by a light gray arrow located on the edge of the field.

An example of a browse input field is located in 'Item. Connect Warehouse' (MMS002) with the label, Warehouse type.

- 1 Right-click the browse field and select **Browse**.
- 2 In the M3 Browse dialog box, select a record in the list and click **Select**.
- 3 Click the available buttons depending on your required action.

Button	Description
Work With	Click this button to open the M3 program that maintains the list of records in the Browse dialog box.
Refresh	Click this button to update the information in the Browse dialog box.

Button	Description
Selection	Click this button to filter the list in the Browse dialog box.
Next View	Click this button to display the next available browse view.
Select	Click this button to select the record as the input for the browse field.

The available options may vary depending on the current program.

- 4 If you do not see the record that you are browsing for in the Browse box and you need to access the M3 program that maintains the data, follow these steps:
 - a In the M3 Browse dialog box, click **Work With**. The M3 program maintaining the data is displayed.
 - Add the new data.
 See <u>Creating a record</u> on page 17.
 - c When the new record is added in the list, select the record and click **Select** from the menu bar.
- 5 Verify that the browse field is populated with the selected record.

Quick Notes

Quick Note is a way to save notes without having to write them on paper.

Quick Note is only available in M3 panels.

- 1 Click **Quick Note** from the menu bar.
- 2 To create a note, drag the text from the M3 panel and drop it on the **Quick Note** button.
- 3 You can also specify the text in the input field and click Add QuickNote.
- 4 To use the text that you saved from the note box, drag the text and drop in an input field of an M3 panel.
- 5 To remove a note, select an item from the note box and click **Delete**. You can also delete all notes, right-click and select **Remove All**.
- 6 Optionally, if you prefer the Quick Note box to be always visible, select **Keep open**.

Exporting to Excel

We recommend that you use a program that can read the .xls file, such as Microsoft Excel or OpenOffice Calc, so that the user can validate the data.

The administrator can disable this feature for all or selected users.

See administration tasks for H5 in M3 CE Core Administration Guide.

- 1 Open a program. The program must be in the B panel.
- 2 Select the records to export.

- 3 Select Tools > Export to Excel.
- 4 Select the rows to export:
 - Export currently selected rows.
 - Export all rows.
 You can export a maximum number of 9999 rows.
- 5 Select the format of the data to export:
 - Source Format: file uses the current data type. The column format in the resulting file is dependent on the data type defined in the list in the M3 program.
 - Target Format: file uses General as the default data format in Excel
 - Text Only: file uses **Text** as the text data format in Excel
 - Source Format with Restrictions: file uses the current data type with exception to column type CHAR and is uppercase.
- 6 Click **EXPORT**.
- 7 Open or save the resulting file.

Exporting to Google Sheets

Use this procedure to export program data to Google Sheets.

The administrator can disable this feature for all users or for selected users.

See administration tasks for H5 in M3 CE Core Administration Guide.

- 1 Open a program. The program must be in the B panel.
- 2 Select the records to export.
- 3 Click Tools > Export to Google Sheets.
- 4 Select row option:
 - Export currently selected rows
 - Export all rows

You can export a maximum number of 9999 rows.

- 5 Select the format of the data to export:
 - Source Format: file uses the current data type. The column format in the resulting file is dependent on the data type defined list in the M3 program.
 - Target Format: file uses Auto as the default data format in Google sheets
 - Text Only: file uses the text data format
- 6 Click AUTHORIZE GOOGLE. You are required to do this only once if you are signed in to Google.
- 7 Optionally, click **SIGN OUT** to sign in to a different Google account.
- 8 Click EXPORT.

The records that were exported to Google Sheets are displayed in a new browser. If Google Sheets does not open in a new browser tab, check your browser's pop-up blocker settings.

Working with Gantt Charts

A Gantt chart is a type of bar chart that illustrates start and finish dates or times allotted for a certain element within a project.

These examples show how a Gantt chart is used in M3:

- In Project Order, a Gantt chart represents the project element and activities as intended in the original implementation of the Gantt chart.
- In the Rental module, a Gantt chart illustrates a renting activity for a specific equipment/car/machine with the start date/time and end date/time.
- In the Maintenance module, a Gantt chart represents an activity/operation in a workshop with the start date/time and end date/time.

Some M3 programs support the ability to create a Gantt chart. Setup is often required in order to support the chart. This topic assumes that any required setup has already been performed.

When the chart exists, you can perform these actions:

- Resize items.
- Move items on the schedule by dragging and dropping.
- Snap to the hour, half hour, or other increment. This action ensures that if you drop a schedule item in the chart, it will always start on either the hour or half hour.

You can change the time increment for snapping. Right-click the chart and select **Snap**. Select a time increment from the list of available increments.

- Run Related options for any item on the chart. Click an item then select an option in the **Related menu** from the menu bar.
- Change the bar fill to either color or pattern. Right-click the chart and either select or disable the **Enable Fill Patterns** option.
- Collapse the **Filter Options** feature to show more Gantt chart rows.

Configuring a timescale

- **1** Open the program with a Gantt chart.
- 2 Right-click the chart and select **Main Timescale**.
- 3 Set the timescale:
 - Hour

Select from these options: Extra large, Large, Normal, Small.

• Day

Select from these options: Normal, Small.

- Month
- Quarter
- 4 To change the settings for days or hours, right-click to open the context menu and then select **Non-Work Settings**.

In the dialog box that is displayed, create changes for the days or hours. These changes are reflected in the timescale. The days or hours that are set as "non-work" are grayed-out in the timescale. You cannot drag and drop items in the grayed-out portion of the timescale.

You can also select **Compressed Non-Work Setting**. Selecting this setting will modify the display of the non-work hours. The hours are shown as ranges, for example 13:00-17:00, on a single scale.

5 You can manually refresh the data in the chart. Right-click the chart and select **Disable Auto Refresh**.

Accessing user documentation for M3 Business Engine

The M3 Business Engine User Documentation contains information for configuring and implementing M3 Business Engine processes.

- 1 To access the Business Engine User Documentation, click **Help** in the menu bar of the BE program.
- 2 Select Form Help... to open the document that is relevant to the BE program.
- **3** You can also select **Documentation Homepage** to display the start page of the Business Engine user documentation.

The User Documentation is displayed in the language that has been set in (MNS150).

Personalization tools

Personalization tools are used to enhance the standard M3 programs and obtain personalized versions that will accommodate the preference of the users. For example, you can add shortcuts by specifying function keys to specific actions or edit the field labels.

Changing M3 program user settings

You can enable or disable M3 program settings depending on the necessity or preference of the users. The user settings are categorized into two areas: general and program options.

General user settings are applied to all programs. Whereas, default actions that are set in Program Options are applicable only to specific programs.

Changing general settings

- 1 Open a program.
- 2 Select Tools > User Settings.
- 3 In the General section, select the preferred settings.

Option	Description
Display system messages in dialog window	Select this setting if you want notification from the M3 server to display in a dialog window in- stead of the status bar. Messages are displayed on the status bar by default.
Display company and division information on the status bar	Select this setting to show the company and division information on the status bar.
Display label tooltips	Select this setting to show the full description of column header labels.
Display help tooltips	Select this setting to show field help.
Right align labels	Select this setting to align field labels to the right.
Use plus key as tab	Select this setting to navigate across the M3 panel using the plus (+) key as an alternative to the tab key.
Position cursor in end of input fields	Select this setting to place a cursor at the end of the value in an input field. When this option is not selected, the entire value in the input field is highlighted.
Expand list	This setting is applicable only to certain pro- grams. If a program supports expandable rows of lists but this setting is disabled, the expandable content will display in list columns
	Select this setting to display expandable rows of lists for programs that support this feature.
Use small view for panel navigator	Select this setting to show the panel navigator in mini-mode.
Show Program ID	Select this setting to show the program ID be- side program name.
Use Infor Ming.le Language	Select this setting to enable H5 to display its contents using the language used by Infor Ming.le.
	See information about changing the site default language in <i>Infor Ming.le User Guide</i> .
Auto-switch to Homepages	Select this setting to enable H5 to automatically switch to Homepages when all programs in H5 are closed.
Activate context help	Use this setting to publish field context details when you select and move your pointer to a particular field or press F1.

Option	Description
Standard option	Use this setting to set the default action that is executed after you double-click the record from the list panel.
	The selected option is the default action for all programs. In the B panel, the blue button shows this default option.
Theme	Use this setting to change the theme color of H5. The theme is only applied on the top part of H5.
Calendar view	Use this setting to select the calendar format displayed when using the date picker tool.
	Note: The default format for most supported languages is Gregorian. Whereas, for some languages the default format might be different.

- 4 Click Save.
- 5 For the changes to take effect, click **Refresh**.

Setting a program option

Use this procedure to set a default action that will result after opening a record. The setting is applicable only to the specified program.

- 1 Open a program.
- 2 Select Tools > User Settings. The User Settings window is displayed.
- **3** In the Program-specific Options section, specify this information:

Program ID

Specify the program name, for example, MMS001.

Option

Select the default action that results after opening a record.

For example, you add a program option with these values:

Program ID: MMS001

Option: 3 - Copy

Every time you open a record from MMS001, the copy option is run by default. The succeeding panels that will follow this default option are determined by what you set.

See instructions in <u>Setting the default panel sequence</u> on page 13.

The selected program option overrides the Standard Options.

See standard options in <u>Changing general settings</u> on page 23.

- 4 Click Add. You can view the new setting in t Available Program Options.
- 5 Click Save.

6 If you set the program option for the current program you are working with, click **Refresh** for the setting to take effect.

Updating the program option for a specific program

- 1 Select Tools > User Settings.
- 2 From the Available Program Options list, determine the program option to modify. Specify the program name in **Program ID**, and select the new default action from the Option list.
- 3 Click Add. Verify if the Description has been updated to the new program option.
- 4 Optionally, you can remove a program option by selecting it from the list and clicking **Delete**.
- 5 Click Save.
- 6 If you updated the program option for the current program you are working with, click **Refresh** for the setting to take effect.

Personalizing M3 panels

The administrator can disable this feature for all or selected users.

- 1 Open an M3 program to personalize.
- 2 Select Tools > Personalize.
- 3 From the personalize menu, select from these personalizations:
 - Hyperlinks
 - Conditional Styles
 - Shortcuts
 - Labels
 - Tab Order
 - Show/Hide fields
 - Scripts
 - Custom Fields
- 4 When you right-click a field and select **Personalize**, you can access these other tools:
 - Enable Favorites
 - Enable Mandatory

The tool is disabled if the field does not support that type of personalization.

- 5 Click Save.
- 6 After you save the personalization, open the M3 panel in H5 Enterprise and verify the changes. If you cannot access a personalization tool, it means that the tool was disabled by the administrator.

See the application settings in M3 CE Core Administration Guide.

Hyperlinks

You can use hyperlink in cases where you use a related program from the **Related** menu. Instead of selecting an item from the menu or pressing **Ctrl** + [option], you can use a hyperlink.

Hyperlinks function like shortcuts or macros in the sense that they save you keystrokes when moving through a program.

Creating hyperlinks

- 1 Open the program for which to create a hyperlink. The program must be in the B panel.
- 2 Select Tools > Personalize > Hyperlinks.
- **3** Specify this information:
 - Field

Select the field from which the related option must be linked.

Related options

Select the action to occur when the hyperlink is clicked.

The list of hyperlinks is displayed when you select the Related menu option from within a program. You can access the same list when you right-click the column header and select **Hyperlink**.

- 4 Click Add to create the new hyperlink.
- 5 Click Save.

Creating text or numeric comparisons using conditional style

Use this procedure to make comparisons between fields that use numeric data or text.

Note: Smart links through conditional style is not supported in H5.

- 1 Open a program.
- 2 Select Tools > Personalize > Conditional Styles.
- 3 Click New.
- 4 Select the field from the Target Field list.

Note: When working with Gantt chart data, set the value of the Target Field to Gantt Chart.

- 5 From the Select condition type list, select either **Numeric** or **Text**.
- **6** Specify this information:

Operator for comparison

Select the operator from the list.

For text and numeric data, you can select the standard comparison operators, such as equal to (=), greater than (>), greater than or equal to (>=).

For text comparisons, you can select Contains, Starts with, and Ends with.

Field or Specific Value

Select **Field** if you are comparing the target field to another field. In the next box, select the field to compare to the target.

Select **Specific Value** if you are comparing the target field to a value. In the next box, specify the value to compare to the target.

If the data contains leading blank spaces, you can remove them by selecting **Trim blank spaces**. Click the **Add** button (+) to add another condition, or click the **Remove** button (-) to delete an existing condition.

- 7 Click Next.
- 8 Format the display characteristics for the field:
 - a On the **Color** tab, change the color for the Field or Text. You can apply the color changes to an entire row by selecting **Enable style for entire row**.
 - b On the **Text** tab, change the alignment and style. You can include your own tooltip text. To display the default tool tip instead, select **Show original value as tooltip**.
 - C On the **Icon** tab, select an icon to go with the field.
 Note: When working with Gantt Chart conditional styles, you can only apply **Icon** as the format.
 - d On the **Hyperlinks** tab, select the **Make field a hyperlink** check box to create a hyperlink for the field. Choose between a related option or a new link.

To open the link in a browser, select the **Open link in external browser** check box.

- 9 Click Next.
- **10** Specify this information:

Name

Optionally, specify a name for the conditional style.

Description

Optionally, provide a description for the conditional style.

- 11 Select the Activate check box for the conditional style to take effect.
- 12 Click Finish.

Creating date comparisons using conditional style

Use this procedure to make comparisons based on dates.

Note: Smart links through conditional style is not supported in H5.

- 1 Open a program.
- 2 Select Tools > Personalize > Conditional Styles.
- 3 Click New.
- 4 Select a field from the **Target Field** list.
- 5 From the **Select condition type** list, select **Date**.

- 6 Select an operator. For date comparisons, the operators are similar to traditional operators, for example less than, greater than, and equal to, but are specific to dates. You can select operators, such as Earlier than, Later than, Earlier than or equals.
- 7 Select the type of date comparison.

Option	Description
Field	If you are comparing the target field to another date field, se- lect Field. And then in the next box, select the date field to compare to the target.
Specific Fixed Dates	If you are comparing the target field to a specific date or dates, select Specific Fixed Dates and click Select Dates .
	In the Select Dates dialog box, use the date picker calendar to select the dates to use for the comparison. You can also remove dates in this dialog box.
Dynamic Date	Use this option to select a range of dates to use for the com- parison.
Specific Dynamic Dates	Use this option to start the interval on a specific date. In this case, specify both a specific date or dates and a date range.
	For example, suppose you need to run a report three days prior to the last Friday of the month. Because the last Friday of the month is not a fixed date, you use the Specific Date section of the dialog box to select the last Fridays of each month. Then you use the Dynamic Date section to specify the third day before each last Friday.
Expression	Use this option to set up a condition using date tokens. These tokens are variables that represent date values. When you right-click the box next to the Expression option, a context menu is displayed and you can choose among the available tokens:
	• [currentdate]
	• [currentmonth]
	• [currentyear]
	Suppose you need to filter forms that will expire today. To make these forms stand out, you can compare the target field against a token expression. For example, the maturity date (target field) is equal (=) to the [currentdate] (token expression).

- 8 If you select **Dynamic Date** and you need to specify when to apply the style, click **Set Date Interval**. If you select **Specific Dynamic Dates**, click **Select Dates** to specify a date range. In both cases, the Set Date Interval dialog box is displayed.
- **9** Specify this information:

Set Date Interval

Select the check box.

Conditional style starting and ending

Specify a number, and then select Days, Weeks, Months, or Years and Before or After.

If you do not specify an end date, the style will continue indefinitely.

The intervals that are available for selection depend on the selected operator. For example, if the condition should compare dates later than another date, and ending option is not available.

- 10 Click OK.
- 11 Click the **Add** button to add another condition, or click the **Remove** button to delete an existing condition. Click **Next**.
- **12** Format the display characteristics for the field:
 - a On the **Color** tab, change the color for the Field or Text. You can apply the color changes to an entire row by selecting **Enable style for entire row**.
 - b On the **Text** tab, change the alignment and style. You can include your own tooltip text. To display the default tool tip instead, select Show original value as tooltip.
 - c On the **Icon** tab, select an icon to go with the field.
 - d On the **Hyperlinks** tab, select the **Make field a hyperlink** check box to create a hyperlink for the field. Choose between a related option or a new link.

To open the link in a browser, select the **Open link in external browser** check box.

13 Click Next.

14 Specify this information:

Name

Optionally, specify a name for the conditional style.

Description

Optionally, provide a description for the conditional style.

- **15** Select the **Activate** check box for the conditional style to take effect.
- 16 Click Finish.

Adding shortcuts

You can add shortcuts to the Toolbox area. The Toolbox slides out from the right side of the M3 panel.

- 1 Open a program panel from which to create a shortcut.
- 2 Click the **Collapse Toolbox** to expand the toolbox area, and click **Shortcuts...** (+). You can also right-click anywhere in the Toolbox area, and then select **Add** from the context menu.
- 3 In the **Shortcuts Organizer** window, select the type of shortcut to add from the Available options:

Related options

Select from the list.

Function keys

Select from the actions/keys.

Link

Specify a name for the link and the Target or URL. Select **New Window** for the shortcut to open a new window.

Links

This option is available only when links to Document Management or to a web page have been previously created through the Link Manager. Select from the list of available links.

Sorting order

Select a query.

4 Click Add to send the selected option to My Shortcuts box. Other available options are:

Move Up/Move Down

Use to change position of items in the list.

Heading

Use to organize your shortcuts into groups. You can assign a heading for each group to distinguish one from the other.

Space

Use to add space in between items in the Toolbox.

Remove/Remove All

Use to remove an item from the Toolbox.

To remove all shortcuts, use Remove All.

You can also right-click an item from the Toolbox, and then select **Remove** from the context menu. After you click **Remove**, you are prompted to remove the shortcut. Click **Yes**.

Rename

Use this option to change the name of a shortcut or a heading.

From the My Shortcuts list, you can rename a shortcut or heading by doing any of these actions:

- Double-click the shortcut or heading.
- Select the shortcut or heading and press Enter.
- **5** Expand the Advanced section to create shortcuts for your scripts.

6 Specify this information:

Name

Specify a name for the script shortcut.

Value

Specify the shortcut key for the script.

Script name

Select script name.

Script arguments

Specify arguments to include in the script.

Click **Add** to create the script shortcut.

- 7 Click Save.
- 8 Verify that your shortcuts are added to the Toolbox.

Editing labels

When you edit labels, you change the displayed text on a specific form that shows field names or column headers. You can edit labels to use a term that you find more meaningful than the term provided by Infor.

- 1 Open a program.
- 2 Select Tools > Personalize > Labels. The form opens in editable mode.

You can also perform any of these actions to start editing labels:

- Right-click the column header > Labels.
- Right-click the open space of filter options > **Personalize** > **Labels**.
- **3** Replace the current text with a new label.
- 4 Click Save.

To restore the default labels, click **Use Default**. You can restore defaults after a form containing edited labels has been saved.

Hiding or showing fields

If there are fields on the M3 panel that you do not use, you can hide them. The fields are not removed from the database, just from your version of the form.

- 1 Open a program.
- 2 Select Tools > Personalize > Show/Hide Fields.
- 3 Select a check box to remove either the field or label. To reinstate a field or label, select the check box.
- 4 To hide all fields on a form, click Clear All.
- 5 To reinstate all hidden fields, click **Show All**.
- 6 Click Save.

Creating scripts

Use this procedure to link an existing script to a target within a program. The script must already exist at the time you link the target.

- 1 Open a program.
- 2 Select **Tools > Personalize > Scripts** or right-click the open space of Filter Options and select **Personalize > Scripts**.
- **3** From the Target list, select the item for which to attach a script.
- 4 Specify the name of the script.

- **5** Specify arguments to include in the script.
- 6 Click Add.
- 7 Click Save.

Adding custom fields to panel

See the overview of customer-defined fields in the *M3 Application Foundation User Guide*. **Note:** This personalization is not applicable in list panels.

- 1 Open a program.
- Double-click any record.
 The detail panel of the program is displayed.
 Note: In User Settings, set the standard option to Change or Display first.
- 3 Select Tools > Personalize > Custom Fields.
- 4 Drag and drop a custom field to the panel.
- 5 To change the width of the field, rest your pointer on the added field and click **Decrease width** or **Increase width**.
- 6 Click Save.

Removing custom fields from a panel

- 1 Access the detail panel of the program and launch the custom fields personalization tools.
- 2 Rest your pointer on the added field and click **Remove**.
- 3 Optionally, click **Clear All** to delete all custom fields.
- 4 Click Save.

Enabling text box history

Use this procedure to enable or disable history in input fields of detail panels. This feature stores previously specified information as text box favorites.

- 1 Access the detail panel of a program.
- 2 Select the input field where to enable the text history.
- 3 Right-click the field and select **Personalize** > **Enable Favorites**.

Setting a field to mandatory

Use this procedure to make a field mandatory. A mandatory field must be completed by specifying a value. If this field is blank, the user cannot proceed to the next panel or form.

- **1** Access the detail panel of a program.
- 2 Select the input field to be mandatory.
- **3** Right-click the field and select **Personalize** > **Enable Mandatory**.

An asterisk indicates that the field is mandatory. To disable the feature, right-click the field and select **Personalize** > **Disable Mandatory**.

Customizing list views

You can customize list views for M3 programs where the Edit View feature is available. If the M3 program shows a **View** menu, then the Edit View feature is enabled for that program.

Customizing a view

- 1 Access the list panel of the M3 program to customize.
- 2 From the **View** menu, select a view to customize.
- 3 Click **Edit view**. The program opens in Edit mode where the column and the position usage bars are displayed.
- 4 Right-click the column to customize and click **Edit**. If the column should not displayed, click **Hide Column**.
- **5** Specify this information:

Name

The menu for this field is disabled.

Field information code

Specify additional field information. This information is used to show the field correctly.

Field length

Specify the number of characters that the field will show. The field length also determines the column width.

If the field is blank, then the field length will follow the M3 standard.

If the value is longer than the M3 standard, a portion of the value will not be displayed.

Number of decimals

Specify the number of decimal places that the field will display. The value can range from 0 to 6. If the field is blank, value defined in the database will determine the number of decimals to be displayed.

Decimal format

Select from the available options in the menu.

Edit code

Select from the available options in the menu. Click **Help** for more information about the valid alternatives.

Debit/Credit code

Select the check box if a transaction entry must be supplemented with a debit or credit code in addition to the amount's sign (+/-).

If you select the check box, then the amount is recorded as a debit or credit record, regardless of the character. The code is mandatory for each amount entry.

If you do not select the check box, then an amount with a positive sign is always recorded as a debit, whereas an amount with a negative sign is always recorded as a credit.

Note: Changing how debit or credit codes are handled must not be performed during an active accounting year because extensive changes are required.

Edit field

Select the check box to make the columns editable in the list view.

Date format

Select from the available options in the menu.

Aggregation display rule

Specify how the information in the field is displayed if the line is aggregated. Select from the available options in the menu.

Subtotal rule

Specify how the information in the field is displayed if the line is a subtotal. Select from the available options in the menu.

Drop down

Specify how to display a text description for a specified field value. Select from the available options in the menu.

Note: These properties may not be enabled in all columns. Enabled properties depends on what column you are editing.

- 6 Click OK.
- 7 To add columns, click the Select columns arrow. Drag and drop the columns to rearrange them. Note: In the new H5 UI, when you add columns you have to select Manage Columns.
- 8 Select the columns to add. As you select or deselect columns, the usage bars for columns and positions move accordingly.
- 9 Click Save.

To save the changes as a new view, click **Save As**. Specify a name and description, and determine whether the view should be shared. Click **Save**.

Creating a view

- 1 Access the list panel of the M3 program to customize.
- 2 Click Edit view.
- 3 Click New.
- 4 Specify a name and description, and determine whether the view is shared. Click **Save**.

- **5** Make the customizations.
- 6 Click Save.

Deleting a view

- 1 Access the list panel of the M3 program to customize.
- 2 From the **View** menu, select the view.
- 3 Click Edit view.
- 4 Click Delete.
- 5 Click **Yes** to confirm the action.

Customizing list column order

You can customize list columns for M3 programs manually. If an M3 program does not have an Edit View feature, you can customize the order of list columns through drag and drop action.

Removing personalizations

You can undo the personalizations that you made to panels and programs in M3 H5.

If you are a member of a group, you can see all the changes made by the other group members. If you make additional changes, your changes will override any group changes and will only be visible to you.

You can also delete all personalizations that you have made to a panel or program. This is not the same as removing individual personalizations which you can do from within the type of personalization. For example, if you have made personalizations to the tab order and to the field labels, you can remove all of them by using **Delete Panel Personalizations**. To reinstate the tab order instead, select **Tools** > **Personalize** > **Tab Order**.

Removing panel and program personalizations

- 1 Open a panel or program.
 - You can only remove personalizations that you made.
 - Program personalizations are personalizations that are applied to the entire program, for example, MMS001, as opposed to a browse panel such as MMS001/B. If you delete program personalizations, then personalization on all panels within a program are deleted.
 - Global and role personalizations are removed permanently by using the Delete option from Administration Tools > Personalizations.
- 2 Select Tools > Personalize. Select from these options:
 - Delete User Panel Personalizations: deletes your own personalizations on the current panel
- Delete User Program Personalizations: deletes your own personalizations on the current program
- **Delete Panel Personalizations**: hides global and role personalizations, in addition to removing your personalizations on the current panel
- **Delete Program Personalizations**: hides global and role personalizations, in addition to removing your personalizations on the current program
- 3 Click **YES** to confirm.
- 4 Refresh the program for the changes to take effect.

M3 H5 and Infor Ming.le

Infor Ming.le provides the first level navigation for one or more Infor applications and serves as an infrastructure to mash-up these applications. This infrastructure includes the capability to send context data between Infor Core products and Context Applications.

As an Infor Core product, M3 H5 Client runs inside Infor Ming.le and uses its infrastructure to communicate with the Context Applications of Infor Ming.le.

Using Infor Ming.le

Infor Ming.le allows social interaction between users within a business environment. To be able to connect and share information with other users and groups, you must first set up your profile.

For information about user profiles, see Infor Ming.le Online Help.

Posting on feed page

After you set up your own profile, you can access your **Feed** page.

- 1 Click the My Feed link or the **Activity Feed** icon to access your **Feed** page. When you use M3 H5, you can share M3 program-related data on your feed page.
- 2 Click the **Share** icon on the top navigation panel. You can use this icon to post on your feed page without leaving the current M3 panel.
- **3** Provide a description for your post.
- 4 Optionally, add an attachment and set the privacy level as Connections, Public, or Groups.
- 5 Click **Share** to share the content to your feed page. The post is recorded in the **My Feed Page** and contains the link to the M3 panel for sharing.

For information about using the Infor Ming.le header, see Infor Ming.le Online Help.

Using Homepages for M3

Homepages provide role-based home pages with widgets containing information from multiple ERP systems in one place.

See more details about Homepages in Infor Ming.le Cloud Edition Online Help.

Navigating to M3 Homepages

- **1** Sign in to Infor Ming.le.
- 2 Click the App Menu icon.
- 3 Select Homepages.

Creating a page

- 1 Click the page menu icon (...) on the page title bar.
- 2 Select New Page.
- 3 In the New Page dialog, specify the page title and description. You can also select a page color.
- 4 Click Create.

Adding a widget

- 1 In your new page, click Add Widget.
- 2 Click the search icon in the widget catalog title bar and specify M3.
- **3** To show the M3 standard widgets only, expand Type under the Refine by section in the side bar and select **Standard** only.
- 4 Locate a widget in the catalog, and click the add icon (+) to add the widget.
- 5 Click Save.

Adding a banner widget

- 1 In your homepage, click Edit.
- 2 On the header area, click + Add Banner widget.
- **3** From the Banner Widget Catalog, select an existing widget or search for a particular widget to add.
- 4 On your selected widget, click + Add Widget. A message indicating that the widget has been added is displayed.
- 5 Click **Close** to return to your homepage. The selected widget is now added to the header area.
- 6 Click Save.

Configuring a banner widget

- 1 Add your preferred widget.
- 2 Click Configure Widget.
- **3** The next steps may vary depending on the selected widget. Refer to respective configuration procedures for every available widget that can be added as a banner.

If you add a viewer widget for example, see <u>Configuring the M3 Information Viewer widget</u> on page 40.

M3 widgets

M3 Homepages contain a set of widgets that are highly configurable and can be tailored to the needs of the user.

Configuring the M3 Application Messages widget

Note: Items that are displayed in this widget are taken from (CRS640).

- 1 Add the M3 Application Messages from the widget catalog.
- 2 Click Configure Widget.
- **3** Specify this information:

Title

Click the unlock button and specify a widget title.

Sort by

Click the drop down field and select a sorting option.

Sort order

Click the drop down field and select an order for sorting the messages.

4 Click Save.

Using the M3 Application Messages widget

The context menu provides options that you can use for each item displayed in the application messages widget. To access the context menu, right-click an item and select your preferred option:

- Select **Open** to go to Infor M3.
- Select Copy link to clipboard to open an M3 record.
- Select **Mark as complete** to change the status of the task to complete. When you select this option, a prompt is displayed to confirm the completion. After confirming, the completed task is removed from the widget. In M3, the status field of the record in (CRS420) is automatically set to 50-'Completed'.
- Every task in the widget is assigned a color depending on the status:
 - Blue: signifies that the task is not started yet.

- Yellow: signifies that the task is needed for the current date.
- Red: signifies that the task is overdue.

Configuring the M3 Environment widget

- 1 Add the M3 Environment from the widget catalog.
- 2 Click Configure Widget.
- 3 Specify a title for the widget. To modify the title, click the unlock button and specify a new title.
- 4 Click Save.

Configuring the M3 Menu widget

- 1 Add the M3 Menu from the widget catalog.
- 2 Click Configure Widget.
- 3 Specify a title for the widget. To modify the title, click the unlock button and specify a new title.
- 4 Click Save.

Configuring the M3 Information Viewer widget

- 1 Add the M3 Information Viewer from the widget catalog.
- 2 Click Configure Widget.
- **3** Specify this information:

Title

Click the unlock button and specify a widget title.

Automatic Refresh Rate

Click the drop down field and select a refresh rate minute interval.

Bookmark Options

Optionally, you can select from existing bookmark options. Click **Get Ming.le Bookmark** and select an existing bookmark.

To create your own bookmark, see <u>Configuring a bookmark</u> on page 47.

4 Configure the M3 API:

Program

Click the look-up button. You can search for M3 programs, for example **CRS610**, and provide a description to filter the results. Click a record from the programs list and click **Select**.

Transaction

Click the look-up button. You can search for a transaction, for example **SearchCustomer**, and provide a description to filter the results. Click a record from the transactions list and click **Select**.

Input

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Input column to select the Input Fields to be submitted for the MI Transaction.
- Change the input field's value in the Value column, for example specify **BLCD**: [0 **TO 8**]; for SQRY.
- Select the check boxes in the User input column to enable the user to override the input value from the widget actions on the widget menu.
- Optionally, specify an entity type if you require the widget to retrieve business context messages, for example, InforCustomerPartyMaster. And then specify an input in the Value field that uses the entity type enclosed in a bracket. This example shows the format: {InforCustomerPartyMaster}. The same input is reflected in the Id1 context message which you can use as an input field to run the MI request.

Note: Other supported macros are used in the **Value** field. See <u>Supported macros for the input field</u> on page 43.

Output

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Output column to select the output fields to be submitted for the MI transaction.
- Specify a value under the View Order column to specify the order of the output fields for display, for example CUNO; CUNM; STAT; CUCL.
- Select a maximum record count.
- Optionally, enable a bookmark. If selected, you can configure additional fields. See Enabling <u>a bookmark</u> on page 48.

Display content as

Click the drop down and select a display type. If you select graph, additional fields should be configured. See <u>Configuring a graph</u> on page 48.

5 Click Save.

Configuring the M3 Information Monitor widget for basic MI transactions

- 1 Add the M3 Information Monitor from the widget catalog.
- 2 Click Configure Widget.
- **3** Specify this information:

Title

Click the unlock button and specify a widget title.

Automatic Refresh Rate

Click the dropdown field and select a refresh rate minute interval.

4 Click Add Monitor and configure the monitor to be added.

Monitor Name

Specify a monitor name.

Severity Indication

If selected, you can press the **Configure** button and add input ranges for indicators.

Drilldown

If selected, you can specify a primary action to either Drilldown or Open and specify a maximum record count.

Bookmark Options

Click **Get Ming.le Bookmark**. Click the dropdown field and select from the existing bookmark options.

Optionally, you can modify your own bookmark. See <u>Configuring a bookmark</u> on page 47.

5 Configure the M3 API. Specify this information:

Program

Click the look-up button. You can search for M3 programs, for example CRS610, and provide a description to filter the results. Click a record from the programs list and click **Select**.

Transaction

Click the look-up button. You can search for a transaction, for example **SearchCustomer**, and provide a description to filter the results. Click a record from the transactions list and click **Select**.

Input

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Input column to select the Input Fields to be submitted for the MI Transaction.
- Change the input fields' value in the Value column, for example specify **BLCD**: [0 **TO** 8]; for SQRY.
- Select the check boxes in the User input column to enable the user to override the input value from the widget actions on the widget menu.
- Optionally, specify an entity type if you require the widget to retrieve business context messages, for example, InforCustomerPartyMaster. And then specify an input in the Value field that uses the entity type enclosed in a bracket. This example shows the format: {InforCustomerPartyMaster}. The same input is reflected in the Id1 context message which you can use as an input field to run the MI request.

Note: Other supported macros are used in the **Value** field. See <u>Supported macros for the</u> <u>input field</u> on page 43.

Output

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Output column to select the output fields to be submitted for the MI transaction.
- Specify a value under the View Order column to specify the order of the output fields for display, for example CUNO; CUNM; STAT; CUCL.

- Select the check boxes in the User input column to enable the user to override the input value from the widget actions on the widget menu.
- Select a maximum record count.
- Optionally, you can enable a bookmark. See Enabling a bookmark on page 48.

Display content as

Click the dropdown and select a display type. If you select graph, additional fields should be configured. See <u>Configuring a graph</u> on page 48.

6 Click OK.

Supported macros for the input field

Infor entities macros

The macros for entities uses this format: {*<infor_provided_entity_name>*}. For example, {InforCustomerPartyMaster}. Take note that the user should also add the same entity name on the entity type column when configuring the input parameter.

Location macros

The macros for location uses this format: {<*coordinate*>, [*<no_of_decimals*>]} where the value inside the square brackets [] are optional.

The types of location macros include:

- {longitude}
- {latitude}
- {*latitude*, 3} where 3 is optional in this example
- Date macros

The macros for location uses this format: DATE(*<integer>*).

The date macros may vary depending on the supplied integer:

- DATE(-30): calculates date of 30 days behind from the current date
- DATE(0): current date
- DATE(+30): calculates date of 30 days ahead from the current date
- User context macros

The macros for user context uses this format: {<user context fields>}.

Note: The user context fields are retrieved from the current user records from (MNS150).

This list contains the supported user context macros:

- {CONO} user's company
- {DIVI} user's division
- {LANC} user's language
- {DTFM} user's date format
- {DCFM} user's decimal format
- {TIZO} user's time zone
- {FACI} user's facility
- {WHLO} user's warehouse
- {TX40} user's company name

- {CONM} user's division name
- {DFMN} user's start menu
- {USID} user's ID
- {NAME} user's full name
- {USTA} user's status
- {USTP} user's type
- {EQAL} user's equipment alias search sequence
- {EMAL} user's email address
- {MNVR} user's menu version

Using the Copy Monitor functionality

Use this functionality to copy an existing monitor without doing a configuration of the widget manually.

- 1 Add M3 Information Monitor from the widget catalog.
- 2 Click Configure Widget and specify a widget title.
- 3 Click + Add Monitor and complete your configuration, see <u>Configuring the M3 Information Monitor</u> widget for basic MI transactions on page 41.
- 4 Click Save.
- 5 Right-click your existing widget, and select Copy.
- 6 Optionally, specify a new title for your widget copy and click **OK**. All configurations from the source widget are copied to the new widget. You may update the configurations of your widget copy after using this functionality.

Using Translations in M3 Information Monitor widgets

Add translations that converts the monitor names to your preferred language.

Note: The change will reflect depending on the language set from the User settings of homepages.

- 1 On the Edit Monitor dialog, click **Translations**.
- **2** On the Add Translation dialog, specify this information:

Language

Use the list to select your preferred language.

Name

Specify the name to translate.

- 3 Click Add.
- 4 On the Translations dialog, click **Add Translation** to add more languages.
- 5 Click OK.
- 6 On the Edit Monitor dialog, click **OK** to exit.

Configuring the M3 Product Updates widget

- 1 Add the M3 Product Updates from the widget catalog.
- 2 Click Configure Widget.
- **3** Specify this information:

Title

Click the unlock button and specify a widget title.

Product

Select a value from the list, for example M3 Business Engine.

Latest Update

Select this check box to view the latest update for the selected product.

Feature review status

Select this check box to view the number of installed features that require review. By clicking **Details**, you are navigated directly to H5 Enterprise with the list of features by NCR record.

Current product version

Select this check box to view the latest product version. **Note:** This is only available when you select M3 Business Engine in the **Product** field.

4 Click Save.

Configuring the M3 Information Creator widget for basic MI transactions to create data

- 1 Add the M3 Information Creator from the widget catalog.
- 2 Click Configure Widget.
- 3 Specify a title for the widget. To modify the title, click the unlock button and specify a new title.
- 4 Configure the M3 API. Specify this information:

Program

Click the look-up button. You can search for M3 programs, for example CRS610, and provide a description to filter the results. Click a record from the programs list and click **Select**.

Add Transaction

Click the look-up button. You can search for a transaction, for example AddTool, and provide a description to filter the results. Click a record from the transactions list and click **Select**.

Input Fields

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Input column to select the Input Fields to be submitted for the MI Transaction.
- Change the input fields' value in the Value column.
- Optionally, configure a browse field. See <u>Configuring a browse field</u> on page 49.

5 Click Save.

Configuring the M3 Information Editor widget for basic MI transactions to update data

- 1 Add the M3 Information Editor from the widget catalog..
- 2 Click Configure Widget.
- **3** Specify this information:

Title

Click unlock button and specify a widget title.

Automatic Refresh Rate

Click the dropdown field and select a refresh rate minute interval.

4 Configure the M3 API. Specify this information:

Program

Click the look-up button. You can search for M3 programs, for example CRS610, and provide a description to filter the results. Click a record from the programs list and click **Select**.

Get Transaction

Click the look-up button. You can search for a transaction, for example **SearchCustomer**, and provide a description to filter the results. Click a record from the transactions list and click **Select**.

Input

Click the look-up button.

On the data grid, you can perform these tasks:

- Select the check boxes in the Input column to select the Input Fields to be submitted for the MI transaction.
- Change the input fields' value in the Value column.
- Optionally, specify an entity type if you require the widget to retrieve business context messages, for example, InforCustomerPartyMaster. And then specify an input in the Value field that uses the entity type enclosed in a bracket. This example shows the format: {InforCustomerPartyMaster}. The same input is reflected in the Id1 context message which you can use as an input field to run the MI request.

Note: Other supported macros are used in the **Value** field. See <u>Supported macros for the</u> input field on page 43.

Output

Click the look-up button.

On the datagrid, you can perform these tasks:

- Select the check boxes in the Output column to select the output fields to be submitted for the MI transaction.
- Specify a value under the View Order column to specify the order of the output fields for display, for example CUNO; CUNM; STAT; CUCL.
- Select a maximum record count.

Update Transaction

Click the look-up button. You can search for update transactions, for example ChgBasicData and provide a description to filter the results. Click a record from the transactions list and click Select.

Editable Fields

Click the look-up button to switch to the Input/Output Parameters page.

On the datagrid, you can perform these tasks:

- Select the check boxes in the Input column to select the Input Fields to be submitted for the MI transaction.
- Change the input fields' value in the Value column.
- Optionally, configure a browse field. See <u>Configuring a browse field</u> on page 49.
- 5 Click Save.

Editing an information in the M3 Information Editor widget

- 1 Open the M3 Information Editor widget.
- 2 Optionally, specify a value or a description in the Search field.
- **3** Click the available record from the list.
- 4 The displayed fields are based from the values gathered from the M3 Information Creator. You can modify values in the existing fields, for example **Name** field.
- 5 Click Submit. An Update Transaction Success is displayed.

Configuring a bookmark

Use this procedure to create a bookmark that opens an M3 program. To access the bookmark, click the main options of the widget where you configured the bookmark and click **Open**.

- 1 When configuring a widget, click Edit beside Get Ming.le Bookmark.
- 2 Specify this information:

Program

Specify any M3 program, for example **CRS610**. Click **Get** beside the field to get accurate bookmark parameters for the program.

Table

Specify any M3 Table, for example **OCUSMA**. Click **Get** to get accurate bookmark parameters.

Sort Order

Specify any M3 sort order value, for example 1.

View

Specify any M3 view value, for example **STD01-01**.

Query

Specify any bookmark query value, for example **CONO: 880**.

3 Click OK.

Enabling a bookmark

Use this procedure to bookmark a user's record in M3. To access the bookmark, right-click a specific record where you configured the bookmark, then select **Open**.

Note: This option is only enabled if the selected output fields meet these requirements:

- Key string (KSTR) fields
- Combination of table fields and program fields:
 - Program field should either be YPGM or PGNM.
 - Table name should either be YFIL or FILE.
- 1 When selecting parameters for the **Output** field, enable your bookmark settings.
- **2** Specify this information:

Option

Specify an M3 bookmark option, for example 2.

Start panel

Specify an M3 bookmark start panel, for example J.

Focus Field

Specify an M3 bookmark focus field, for example **WRBLCD**.

3 Click OK.

Configuring a graph

- 1 In **Display content as**, select graph as your display type. .
- 2 Press the Configure Button.
- 3 In the graph view settings, specify this information:

Chart type

Click the dropdown and select a chart type.

Label Column

Click the dropdown and select a label column. The values are taken from the fields selected in the MI Output Configuration above, step 4.

Value Column(s)

Click the dropdown and select the value column. The values are taken from the fields selected in the MI Output Configuration above, step 4.

Group by label column

If enabled, data is aggregated by value type.

Group by type

Select between count or by sum.

Enable debit/credit conversion

If enabled, you can specify values for the **Debit sign** or **Credit sign** fields.

Configure Drilldown

Perform the same steps in configuring an M3 API which is done for selected widgets. Additionally, provide field mappings for **Map drill parameters** that uses retrieved data from output fields after clicking a specific information in the configured graph.

4 Click OK.

Configuring a browse field

- 1 In the **Input** fields, click the look-up button.
- **2** Specify this information:

Table

Specify a table, for example **OCUSMA**.

Field Override

Specify any M3 API Field, for example **CONO**.

Set as Browse

Select the check box to set the parameter as browse field.

Browse Field

Click the **Edit** button to modify the browse field overrides.

Field	Description
Field Override	Contains M3 API fields, for example CONO.
Parameter List Index	Contains an index of the available data.
From Table	Contains M3 table values, for example {} or OCUSMA. This field is auto filled by the Parameter List Index.
Browse Variant	Contains browse variant values, for example 00 or 01. This field is auto filled by the Parameter List Index.
Add a filter	Selecting this check box enables you to specify filter fields.

View Order

Specify an input a value to specify the order of the input fields for display.

3 Click Save.

Infor Business Context

The Infor Business Context feature broadcasts contextual data from H5 application, which then triggers a related output from a subscribed Infor Ming.le context application. For the feature to work, the context application must be subscribed to the Infor Business Context message of type *inforBusinessContext*.

Note: The Infor Business Context option is not displayed in the Context Publisher menu when the Auto Publish Infor Context property is enabled. All data matching the specified business context fields will be automatically published when this property is enabled.

See application settings in M3 CE Core Administration Guide.

Using Infor Business Context

- 1 Open a program. If program opens in B panel, select a record.
- 2 Select Tools > Context Publisher > Infor Business Context.
- 3 In the **Infor Context Business** window, the business entities are mapped to specific fields. These entities will differ depending on which M3 panel is opened.

To use the Paparazzi context application, a reference between the business context and the corresponding BODs must be configured. The required configuration can only be performed by looking at the specific noun and how M3 data is mapped into the BOD elements.

Field	Description
Noun	This noun corresponds to the Infor Business Context.
Document ID	See M3 Business Engine BODs Mapping Documentation - Inbound and M3 Business Engine BODs Mapping Documentation - Out- bound for information about how the M3 data is mapped into the Document ID of the BOD.
Accounting Entity	The M3 standard specifies that it must be defined as <cono>_<divi> (Company_Division). This can change during installation, so verify that the installation follows the standard.</divi></cono>
Location	The value for the location corresponds to M3 Warehouse. See M3 Business Engine BODs Mapping Documentation - Inbound and M3 Business Engine BODs Mapping Documentation - Outbound.
Revision ID	This is usually blank.

If you select **Auto Publish**, these entities are automatically published regardless of which record you open.

To reset the values, click Use Default.

- 4 Click **Save** after supplying the values.
- **5** Verify that all subscribed context applications are triggered to show information related to the current record.

Context Publisher data is stored as personalization.

Using Mashup Context

Use the Mashup Context to send contextual information from an M3 program directly to the Mashup context application.

- 1 Open a program.
- 2 Select Tools > Context Publisher > > Context Publisher.
- 3 In the **Mashup Context** window, specify this information:

Mashup

Specify the name of the mashup.

Application

Specify the application within the mashup to show the context application.

Default Values

This field can hold startup parameters for the mashup. Valid fields are located in this list. Double-click the field name to add to the Default Values field. The value is divided in key-value pairs separated by a semi-colon, where the key is the name of the parameter in the mashup and the value is the field name in the M3 program.

To reset the values, click Use Default.

If you select **Auto Publish**, these entities are automatically published, regardless of which record you open.

- 4 Click Save.
- 5 Verify the mashup in the Mashup context application.Note: Context Publisher data is stored as personalization.

Adding M3 program in the Favorites menu

If you use an M3 program regularly, you can add it in Favorites for easy access.

Adding an M3 program

- 1 Select an M3 Transactions category from the application menu and select a program.
- 2 Right-click the program tab and select Add to Favorites.
- **3** Verify if the program is added to your Favorites.
 - a Select **Favorites** from the **application** menu.
 - b Click the program name from the Favorites list.

Removing an M3 program

When you remove favorites from the application menu, the favorites list are also removed from the Favorites section in the landing page.

- 1 Select **Favorites** from the application menu.
- 2 To remove a specific item in the list, right-click the program name and select **Remove**.
- 3 To remove all items, right-click anywhere on the panel and select **Clear All**.

New H5 UI

The new H5 user interface is updated with the latest visual style and controls from Infor Design System.

Application menu

The default or normal view of the application menu contains these selections:

- Start: Provides an option to users where they can search for a specific program name or ID.
- Favorites: Contains favorite M3 programs and other applications defined by the user.
- Recent: Gathers the selection that you last accessed, for example M3 program, administration tool etc.
- Administration Tools: Provides access to tools and is available to administrators who maintain the H5.
- Mashup Library: Contains available mashup applications
- M3 transactions menu: Provides access to M3 programs

User settings

The M3 program settings are customized depending on the necessity or preference of the users. The user settings are categorized into these areas: General, Options, Appearance.

- General: Settings that are applicable to all programs
- Options: Settings that are only applicable to specific programs
- Appearance: Settings that enhance the look of the interface

The user settings for the new H5 UI contains distinct settings that are not accessible in the classic H5.

Changing the user settings

1 Open a program.

2 Select Tools > User Settings.

3 In the **General** tab, select the preferred settings:

Option	Description
Display system messages in dialog win- dow	Select this setting if you want notification from the M3 server to display in a dialog window instead of the status bar. Messages are displayed on the status bar by default.
Display company and division informa- tion on the status bar	Select this setting to show the company and division information on the status bar.
Display company and division informa- tion on the toolbar	Select this setting to show the company and division information on the toolbar.
Show Program ID on program tab	Select this setting to show the program ID beside the program name.
Display label tooltips	Select this setting to show the full description of field labels.
Display help tooltips	Select this setting to show field help.
Activate context help	Use this setting to publish field context details when you select and move your pointer to a particular field or press F1.
Right align labels	Select this setting to align field labels to the right.
Use plus key as tab	Select this setting to navigate across the M3 panel using the plus (+) key as an alternative to the tab key.
Position cursor in end of input fields	Select this setting to place a cursor at the end of the value in an input field. When this option is not selected, the entire value in the input field is highlighted.
Expand list	This setting is applicable only to certain programs.
	If a program supports expandable rows of lists but this setting is disabled, the expandable content will display in list columns.
	Select this setting to display expandable rows of lists for programs that support this feature.
Use small view for panel navigator	Select this setting to show the panel navigator in mini- mode.
Use Infor Ming.le language	Select this setting to enable H5 to display its contents using the language used by Infor Ming.le.
	See information about changing the site default lan- guage in <i>Infor Ming.le User Guide</i> .
Auto-switch to Homepages	Select this setting to enable H5 to automatically switch to Homepages when all programs in H5 are closed.

Option	Description
Enable classic UI	Use this setting to switch between the classic UI and the new UI.
Enable browser autofill	Use this setting to automatically fill text fields using the value that you used as input. This setting over- rides the Enable Favorites personalization feature.
	Note: Ensure that the 'Save and fill addresses' setting in Chrome is also enabled to make the autofill work.
Calendar view	Use this setting to select the calendar format dis- played when using the date picker tool.
	Note: The default format for most supported lan- guages is Gregorian. Whereas, for some languages the default format might be different.

4 In the **Options** tab, configure the settings of a specific program:

Option	Description
Standard option	Use this setting to set the default action that is execut- ed after you double-click the record from the list panel.
	The selected option is the default action for all pro- grams. In the B panel, the blue button shows this de- fault option.
Program Options	 To configure this setting, see procedures: <u>Setting a program option</u> on page 25 <u>Updating the program option for a specific program</u> on page 26

5 In the **Appearance** tab, enhance the look of the interface:

Option	Description
Form Size	Use this setting to change the size of the fields and buttons.
Row Size	Use this setting to change the row height of the data grid.
Theme Colors	Select from the available colors to apply for the inter- face.
	In the new H5 UI, color is also applied in the applica- tion menu.

6 Click Save.

Split screen functionality

Split screen supports merging with non-standard M3 programs and other external sites. This functionality is useful if you have SDK applications that are connected to Infor Business Context messages.

Using the split screen functionality

- 1 Open a program.
- 2 Open another non-standard M3 program or any external website.
- 3 Click the program tab and drag over to the center section of another tab. Ensure that the tab where you form a pair is highlighted with a translucent shade. The dragged tab is positioned in the right of the tab pair by default.

Chapter 2: M3 Metadata Publisher user tasks

Use the M3 Metadata Publisher (MDP) to explore M3-related metadata. It contains files, fields, and relationships between file-programs and program-files. You can use MDP to generate and show metadata for each unique M3 Business Engine customer installation. These metadata are based on the Standard and Market installed components.

You perform these two tasks in this order:

- 1 Perform MDP Client functions.
- 2 View MDP Client task results.

The typical users of the M3 Metadata Publisher are business consultants, partners, and customers. These users can browse M3 Business Engine (BE) tables, columns, and program relationships using M3 Metadata Publisher.

Signing in using a web browser

Use this procedure to sign in to MDP through LifeCycle Manager or a web browser. Before you start ensure that the Application Server for MDP is started.

- 1 Open a web browser.
- 2 Sign in to M3 Cloud Suite.
- 3 Expand Administrator Tools.
- 4 Click M3 Metadata Publisher Tool link. The MDP opening page is displayed.

M3 Metadata Publisher Client UI

When MDP Client is started, a standard view is displayed with several features.

Tabs

Use these tabs to access MDP Client tasks.

Tab	Description
Search	Click to select MDP search types:
	Search by System Configuration
	See <u>Client tasks</u> on page 60.
M3 API Repository	Click to access M3 API Repository
Settings	Settings
	 Language Code: Set the Language code to use.
	For example, GB for English, SE for Swedish, or NO for Norway.
	 Note: The available languages are generated from the applied languages on the MNE folder of the M3 Business Engine installation. Page size: Set the page size to display.
	The minimum setting is 100 rows per page.
	• Content proposal: Toggle the use of Content Proposal in applicable fields. When enabled, open fields will display suggested match as you type. This is not applicable to search strings using wild character asterisk (*).
	 Search history: Option to clear MDP Client search history.
	 About: Opens the copyright and product infor- mation window.

Control Functions

Use these icons to access the MDP Client UI functions.

Icon	Description
Session navigation	Arrow pointing down. Use this to retrace your search result actions.

Search task field definitions

Use the Search feature in MDP Client to select the search type to use and to define the corresponding fields.

Note: Your selected M3 BE System, BE Installation, and Language code is saved on the last signin. Fields are described in this table:

There are MDP functions that are configured so that you can search and view M3-related metadata.

Field/Option	Description
Keywords or Program Name	Use this field to type your search query. You can use alphanumeric characters (A-Z,a-z), blank space, hyphen, colon, or underscore.
	You can use the wildcard character * (asterisk) in place of an unknown string. For example, if you search for "b*d", the results will show hits for "ABCD", "bed" and "abd-001".
Select MDP BE System	Use this open drop-down field to select the MDP BE System where to perform Search.
	A default M3 BE selection is displayed.
MDP BE System information	Represented by an information (i) icon beside the Select MDP BE System field, use this to dis- play more details about your selected MDP BE System.
Containing method/keyword	Similar to Keywords field, use this for a more specific method contained when you select Search by Component.
Select Entity	Select one or more entities to use on your search. The list of available entities vary depending on your selected Search option to use.
More Options	Click this link to show advanced search options. The selections here change depending on your selected Search option to use.
Search	After you define the required task information, click on this icon to invoke search.

Search Results

When you perform an MDP Client task, the Search Results tab opens.

Here is a table list of the Result tab components with description.

Component	Description
Tab Header	 Indicates this information: Search query - enclosed in single quotes ('), in this example, the text 'CONO'. Search method - in this example, Search by System Configuration. Selected BE Installation/System - enclosed in single quotes (') shows where the indexed search was executed.
Results Count	Indicates your selected entity and the total num- ber of results matching your query. <u>Type of System Element</u> : Total match Click <u>Type of System Element</u> to display the re- sults by type or by available relation information. Note: You can drill down the table rows to view more matching results by Program. Use the session navigation icon in the left pane for your history views.
Lock tab icon	By default a tab is unlocked. When you perform a new search, the current tab is replaced with the result of your new search. Lock the current tab to display subsequent search results in new tabs.
List All tabs	Click More to display a list of active tabs and select which tab to display.
Export to Excel icon	Click to export applicable tables or program search results to Excel.
Sort icon	Use the <u>Sort</u> icon to arrange the results, alphabet- ically or numerically for each column, depending on the column property.
Filter options	Lists the available filter options for your search result table.
	a filter condition from this list. To execute your filter definitions. select Run Filter
	in the Filter menu located in the right most side of the pane.
Filter Menu	 <u>Run Filter</u>- select to execute your filter definitions. <u>Clear Filter</u> - select to clear your filter definitions.

Component	Description
Table Paging	From the Settings menu, set the Page size in terms of number of rows to display in a page.
	The status at the bottom of the screen shows the number of rows and the number of pages displayed in a given total.
	Click the <u>Forward</u> and <u>Back</u> arrows to navigate through the pages. The minimum setting is 100 rows per page.

Client tasks

There are MDP functions that are configured so that you can search and view M3-related metadata.

- <u>Viewing MDP BE system information</u> on page 60
- <u>Searching by System Configuration</u> on page 62
- <u>Viewing Relation Information</u> on page 76
- M3 API Repository on page 101

Viewing MDP BE system information

You must verify the MDP BE System information when searching by system configuration or by component.

Viewing by system configuration

- 1 On the Search tab, click Search By System Configuration.
- 2 Select an MDP BE System to use.
- 3 Click the **information** icon beside the **Select MDP BE System** field. The MDP BE System information window is displayed.
- 4 Verify the information applicable to your selected MDP BE system:

MDP BE System

Lists all available M3 BE Installation and MDP System in MDP Client.

Standard base M3 BE is a system that comes with the installation of the M3 Metadata Publisher and all other BE system metadata generated using LifeCycle Manager.

Note: You can select another MDP BE system to view.

Туре

Method used to generate the BE system metadata, by system configuration or by component.

MDP ID

ID assigned to the MDP client version.

BE version

System metadata BE version.

Environment

LCM environment where MDP is installed.

Server

Server where the component is installed.

Configuration

Configuration used in the MDP BE system. For example: MVX

Components

List of system configuration components. For example: MVX, MAR, MDK

Last update

The date and time when the BE system was last updated in LifeCycle Manager.

Status

Status of the BE system metadata files, if synchronized or not synchronized.

You should always check if the metadata files are updated and synchronized to ensure that new files or fixes are applied in the BE environment.

5 Click **OK** to close the window.

Viewing by Component

- 1 On the Search tab, click Search By System Configuration.
- 2 Select an M3 BE Installation to use.

The M3 BE Installation information window is displayed.

M3 BE Installation

Lists all available M3 BE Installation and MDP System in the MDP client.

Туре

Method used to generate the BE system metadata, by system configuration or by component.

MDP ID

ID assigned to the MDP client version.

BE version

System metadata BE version.

Server Server where the component is installed.

Components

List of system configuration components. For example: MVX, MAR, MDK

Last update

The date and time when the BE system was last updated in LifeCycle Manager.

Status

Status of the BE system metadata files if synchronized or not synchronized.

You should always check if the metadata files are updated and synchronized to ensure that new files or fixes are applied in the BE environment.

Searching by System Configuration

Use these procedures to search by System Configuration.

Search by System Configuration Details

Search by System Configuration is accessed from the **Search** tab and contains these features and fields.

System Configuration fields

Use these options to perform search on M3 BE by System Configuration.

Fields	Description
Keywords	This open text Keyword field is auto complete. Here you type the name or description associated with the program you are searching for using al- phanumeric characters, space, hyphen, colon, or underscore.
	You can also use a wildcard (*) at the beginning, middle, or end of the keyword. Search will look for a match based on your keyword and the posi- tion of the wildcard.

Fields	Description
Select MDP BE System	This open text M3 BE field is auto complete. Use this to select the M3 BE System where to execute the search. A default M3 BE selection is dis- played.
	Note: MDP saves your selected MDP BE System on the last sign in.
	To view MDP BE information - click the MDP BE information (i) icon to display more details about your selected M3 BE System.
M3 BE entities	Use this to select an entity or a combination of entities for your M3 BE by System Configuration. By default, the Program and Table entities are selected.
	In the right pane, the Search Result tab displays the result. By default the table lists 500 data match. On the bar at the top, the information on Entity:Number of matches is shown.
Search	After you define the required task information, click this to perform the search.

M3 BE entities

Drill down on any available data in the list to view more data relational information. The column and data listings vary according to your selected entity.

Entity	Description
Program	This selection displays matching data for program entities.
	Program entities are selected in combination with Table entity.
Parameter List	Shows data match for parameter list entities.
Data Structure	Shows data match for data structure entities.
Output File	Shows data match for output file entities.
Reference Field	Shows data match for reference field entities.
Extension Point	Shows extension point details.
Table	Shows data match for table entities.
	Table entities are selected in combination with Program entity.
Table Columns	Shows data match for table column entities.

Entity	Description
Table Index	Shows data match for table index entities.
Util	Shows data match for util entities.
All	Checks all Entity check boxes.

System Configuration Advanced Search

Click the link to <u>More Options</u> and refer to the field definitions here for M3 Business Engine (BE) system and version advanced filtering.

Fields	Description
Select Component	Select a component corresponding to your select- ed MDP BE system.
Select Category	 List of categories corresponding only to Program, Table, or Program and Table M3 BE entities. This is not available to other entities in the list. For Programs, use Program category list For Tables, use Table category list
Program Filter	 Select the option appropriate to your required program filter. With Bookmark - filters bookmark-enabled programs only. With Bookmark Parameter - filters bookmark parameter enabled programs only. With Bookmark and Bookmark Parameter - filters both bookmark enabled and bookmark parameter-enabled programs. Function Programs - filters function programs only.
Search Limit	Set the result limit from a range of 100 to 10000 with an interval value of 100 for the first 1000. By default the search result displays the first 500 data match. For volume data, processing can take time, we recommend that you consider setting the search limit.

Program category list

Name	Definition
Арі	API
Asj	Autostart job

Name	Definition
Cnv	Conversion programs
Crt	Electronic Chart of Account Report
Dsp	Inquiry programs
Fix	Fix programs
Fnc	Functions
Lst	Lists
Mnt	Maintenance programs
PI	Parameter list
Ptf	PTF programs
Sr	Copy subroutines
Tb	Table
Tst	Test programs
Wrk	Work with programs

Table category list

Name	Definition
DS	Data structures
HF	History file
JD	Join Dynamics
MF	Master data file
SF	System file
TF	Transaction file
WF	Work file

Searching for M3 BE entities

Use this procedure to search for M3 BE entities by system configuration.

- 1 Access the Search tab and select Search By System Configuration.
- 2 Specify the keyword to search.
- **3** Select an MDP BE system to use.
- 4 Select an M3 BE entity to use.
- 5 Click the link to <u>More Options</u> and set the advanced search filter options.

- 6 Select a Component.
- 7 Select a Category. This option is available only to Program or Table entity.
- 8 Set a Search Limit.
- 9 Select a Program Filter.
 - With Bookmark: filters bookmark-enabled programs only.
 - With Bookmark Parameter: filters bookmark parameter-enabled programs only.
 - With Bookmark and Bookmark Parameter: filters both bookmark enabled and bookmark parameter-enabled programs.
 - Function Programs: filters function programs only.
- 10 Click Search.

The Search Results tab displays a list of matching entries based on your search criterion and other relational information corresponding to your selection. On the bar at the top, it shows Selected entity: Number of matches.

- **11** Use these options to manage your results:
 - To sort the results alphabetically or numerically, click the Sort icon on the column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
- **12** To view relation information, click a <u>system element name</u>.

Searching for program

Use this procedure to search for programs of M3 Business Engine (BE) system by system configuration.

- 1 On the **Search** tab, select <u>Search By System Configuration</u>.
- 2 In the **Keywords** field, type a keyword to search.
- Select an MDP BE System to use.
 See <u>System Configuration fields</u> on page 62.
- 4 Select an entity: Program. See <u>M3 BE entities</u> on page 63.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - a Select a Component.
 - b Select a Category.
 See System Configuration Advanced Search on page 64.
 - **c** Select a Program Filter to use.

With Bookmark: to select only bookmark-enabled programs.

With Bookmark Parameter: to select only bookmark parameter-enabled programs.

With Bookmark and Bookmark Parameter: to select both bookmark-enabled and bookmark parameter-enabled programs.

Function Programs: to select only function programs.

d Set the search limit. The default search limit is 500.

6 Click Search.

On the Search Results tab, the Entity (Total match), and a data list with this information is displayed:

Program name Name of the program.

Description Description of the program.

Component Component of the program.

Category Category of the program.

Area of the program.

Bookmark To toggle bookmark enabled.

Bookmark Parameter

To toggle bookmark parameter enabled.

Source Code

Shows the source code of a selected program.

- 7 Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
- 8 To view program relations, click a Program name.
 See <u>Viewing Program Relation Information</u> on page 76.

Searching for parameter list

Use this procedure to search for parameter list of M3 Business Engine (BE) system by system configuration.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the **Keywords** field, specify a keyword to search.
- 3 Select the MDP BE System.
- 4 Select an entity: Parameter.
- 5 Click the link to <u>More Options</u> for additional search filter.

- Select a Component.
- Set the Search limit. The default value is 500.

See System Configuration Advanced Search on page 64

6 Click Search.

On the Search Results tab, the Entity: Total match, and a data list with this information is displayed.

Parameter List Name

The name of the parameter list.

Component

The components of the parameter list.

Source Code

Shows the source code of a selected program.

- 7 Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
- 8 To view Parameter list, click an entity name.
 See <u>Viewing Parameter List Relation Information</u> on page 90.

Searching for data structure

Use this procedure to search for data structure of an M3 Business Engine (BE) system by system configuration.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the **Keywords** field, type a keyword to search.
- 3 Select an MDP BE System.
- 4 Select an entity: Data Structure.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a Component from the list.
 - Set the search limit. The default value is 500.

See System Configuration Advanced Search on page 64.

6 Click <u>Search</u>.

On the Search Results tab the Entity: Total match, and a data list with this information is displayed.

Data Structure Name

The name of the data structure.

Component

The components of the data structure.

- 7 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a **Filter** action.
- 8 To view data structure name, click an entity name.
 See <u>Viewing Data Structure Relations Information</u> on page 92.

Searching for output file

Use this procedure to search for output files of M3 Business Engine (BE) system by system configuration.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the Keywords field, specify a keyword to search.
- 3 Select the MDP BE System to use.
- 4 Select an entity: Output Files.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a Component.
 - Set the search limit. The default value is 500.
- 6 Click Search.

On the <u>Search Results</u> tab, the Entity: Total match, and a data list is displayed:

Output file name

The name of the output file.

Description

The description of the output file.

Component

The components of the data structure.

- 7 Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
- 8 To view Output File file name, click an entity name.

Searching for tables

Use this procedure to search for tables and table indexes of M3 Business Engine (BE) system.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the Keywords field, specify a keyword to search.
- Select the MDP BE System.
 See System Configuration fields on page 62.
- 4 Select an entity: Table. See <u>M3 BE entities</u> on page 63.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - a Select a Component.
 - **b** Select a Category.
 - c Set the search limit. The default value is 500.

See System Configuration Advanced Search on page 64.

6 Click Search.

On the Search Results tab, the Entity: Total match, and a data list is displayed:

Table Name

The name of the table.

Description

The description of the table.

Component

The component of the table.

Category

The category of the table.

- 7 Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
- 8 To view table relations, click a Table Name.
 See <u>Viewing Table and Column Relation Information</u> on page 83.

Searching for table column

Use this procedure to search for table columns of M3 Business Engine (BE) system and version.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the **Keywords** field, specify a keyword to search.

- **3** Select the MDP BE System.
- 4 Select an entity: Table Column.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a Component.
 - Set the Search Limit. The default value is 500.

6 Click Search.

On the **Search Results** tab, the Entity: Total match, and a data list is displayed:

Column Name

The name of the column.

Description

The description of the column.

Data type

The data type of the column.

Length

The length of the column.

Decimals

The decimals of the column.

Edit code

The edit code of the column.

Indexes

The list of index names.

Parent table

The name of the Parent table of the column.

Component

The component of the column.

- 7 Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and specify a dynamic free text filter for each column.
- 8 To view table relations, click **Parent Table** name.

Searching for table index

Use this procedure to search for table indexes of M3 Business Engine (BE) system and version.

1 On the Search tab, click <u>Search By System Configuration</u>.

- 2 In the Keywords field, specify a keyword to search.
- **3** Select an MDP BE System to use.
- **4** Select an entity: Table Index.
- 5 Click the link to More Options for additional search filter.
 - Select a Component.
 - Set the Search Limit. The default value is 500.

6 Click Search.

On the Search Results tab, the Entity: Total match, and a data list is displayed:

Index Name

The name of the index.

Unique

Yes indicates that the index is unique and there can only be one unique key for every table.

Parent Table

The parent table of the index.

Parent Table Description The description of the parent table.

Component

The component of the index.

Key Info The option to view the keys of an index.

Condition Info

The condition information of an index.

Join Table

The join table of an index.

Join Condition

The join condition of an index.

- 7 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and specify a dynamic free text filter for each column.
- 8 To view index relations, click <u>View Index Keys</u>.

Searching for Util

Use this procedure to search for Utils of M3 Business Engine (BE) system and version.
- 1 On the Search tab, click <u>Search By System Configuration</u>.
- 2 In the Keywords field, specify a keyword to search.
- 3 Select an MDP BE System to use.
- 4 Select an entity: Util.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a <u>Component</u>.
 - Set the <u>Search Limit</u>. The default value is 500.
- 6 Click Search.

On the **Search Results** tab, the Entity: Total match, and a data list is displayed:

Util Name

The name of the Util.

Component

The component of the Util.

- 7 Component of the Util.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and type a dynamic free text filter for each column.
 - To view util relations, click <u>Util</u> name.

Searching for Extension Points

Use this procedure to search for Extension Points in M3 Business Engine (BE) system and version.

- 1 On the **Search** tab, click <u>Search By System Configuration</u>.
- 2 In the Keywords field, specify a keyword to search. Use Interface Name or Extension Point Name.
- **3** Select an MDP BE System to use.
- 4 Select Extension Point.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a <u>Component</u>.
 - Set the <u>Search Limit</u>. The default value is 500.
- 6 Click Search.

On the Search Results tab, the matching results and data lists are displayed.

Interface Name

Shows the name of the Interface with Extension Points.

Interface Description

Shows the description of the Interface with Extension Points.

Component

Shows the component of the Interface with Extension Points.

- 7 Optionally, use these options to sort and filter your results.
 - Click the **Sort** icon located in one or more column headings to sort the results alphabetically or numerically.
 - Filter results by clicking the **Filter** icon in the last column and type a dynamic free text filter for each column.
 - Click Interface name to view extension points relations.

Searching for reference fields

Use this procedure to search for Reference Fields of M3 Business Engine (BE) system and version.

- 1 On the Search tab, click <u>Search By System Configuration</u>.
- 2 In the **Keywords** field, specify a keyword to search.
- **3** Select an MDP BE System to use.
- 4 Select an entity: Reference Field.
- 5 Click the link to <u>More Options</u> for additional search filter.
 - Select a Component.
 - Set the Search Limit. The default value is 500.
- 6 Click Search.

On the Search Results tab, the Entity: Total match, and a data list with this information is displayed:

Reference Field

Name of the Reference Field.

Description

Description of the Reference Field.

Component

Component of the Reference Field.

Ext

Ext - Extension file of the Reference field

Туре

Type - Type of the Reference field

Category

Category of the Reference field

Length

Length of the Reference field

Decimals

Decimal value of the Reference field

Add info length Add info length value of the Reference field

Add info short length Add info short length value of the Reference field

Heading

Heading value of the Reference field

Help ID Help ID value of the Reference field

Constraints

Constraints value of the Reference field

- 7 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the **Sort** icon located in one or more column headings.
 - To filter the results, click the **Filter** icon in the last column and specify a dynamic free text filter for each column.

Setting the advanced search filter by system configuration

Use this procedure to set the advanced filtering of M3 Business Engine (BE) system and version.

- 1 On the **Search** tab, select <u>Search By System Configuration</u>.
- 2 Select the **System Configuration** fields.
- 3 Click the link to <u>More Options</u> for additional search filter.
 - a Select a Component.
 - **b** Select a Category for Program or Table entities only.
 - c Select a Program Filter to use.

With Bookmark: to select only bookmark-enabled programs.

- d Set the Search Limit. The default is 500.
- 4 Click Search.

On the **Search Results** tab, the Entity or Total match and other relational information corresponding to your search is displayed. Use this function to have multiple tabs by using the lock function. Filter and sort search results using this feature.

Viewing Relation Information

These functions show the relation between entities. Use Viewing Relation Information functions to check the relationship of entities to various programs.

Viewing Program Relation Information

These are the functions used to view relations of Programs to other entities. Users can check which entities are being referenced by which Programs.

Viewing tables used by a selected program

Before you start, you must complete a program search task. See <u>Searching for program</u> on page 66.

- On the Search Results tab, click Program name.
 A new search result opens with the header Program Relation Type: Total match.
- 2 Click <u>Tables</u> used to show the tables used by your selected program. A new search result opens with this information:

Table Name

The name of the table that is used by your selected program.

Description

The description of the table that is used by your selected program.

Component

The component of the table that is used by your selected program.

Usage

The function of the table that is used by your selected program: Read, Update, and/or Delete.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column to specify a dynamic free text filter for each column.
- 4 To view table relations, click a table name.

Viewing programs used by a selected program

Before you start, you must complete a program search task. See <u>Searching for program</u> on page 66.

1 On the **Search Results** tab, click a Program name.

A new search result opens with the header Program Relation Type: Total match.

2 On the bar at the top, click <u>Programs</u> used to show the programs used by your selected program. A new search result opens with this information.

Program name

The name of the program used by your selected program.

Component

The component of the program used by your selected program.

Description

The description of the program used by your selected program.

Source Code

Shows the source code of a selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a Filter action.
- 4 To view program relations, click a program name.

Viewing programs using a selected program

Before you start, you must complete a program search task. See Searching for program on page 66.

1 On the **Search Results** tab, click a <u>Program name</u>.

A new search result opens with the header Program Relation Type: Total match.

2 On the bar at the top, click <u>Used</u> by to show the programs that are using your selected program. A new search result opens with this information:

Program name

The name of the program using your selected program.

Description

The description of the program using your selected program.

Component

The component of program using your selected program.

Source Code

Shows the source code of a selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column to type a dynamic free text filter for each column.

4 To view program relations, click a program name.

Viewing parameter list used by a program

Before you start, you must complete a program search task.

- On the Search Results tab, click a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- 2 On the bar at the top, click **Plist Used** to show the programs using your selected program. A new search result opens with this information:

Parameter list name

The name of the parameter using your selected program.

Component

The component of program using your selected program.

- **3** Use these options to sort and filter the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column and type a dynamic free text filter for each column.
- 4 To view program relations, click a **Program name**.

Viewing data structure used by a program

Before you start, you must complete a program search task.

1 On the **Search Results** tab, click a <u>Program name</u>.

A new search result opens with the header Program Relation Type: Total match.

2 On the bar at the top, click <u>Data structure used</u> to show the data structures used by your selected program.

A new search result opens with this information:

Data Structure Name

The name of the Data structure used by your selected program.

Component

The description of the Data structure used by your selected program.

- **3** Use these options to manage the results:
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a <u>Filter</u> action.
- 4 To view program relations, click a program name.

5 To view data structure relations, click a <u>data structure name</u>.

Viewing output files used by a program

Before you start, you must complete a program search task.

- On the Search Results tab pane, click a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- 2 On the bar at the top, click <u>Output</u> files used to show the output files used by your selected program. A new search result opens with this information:

Output file Name

The name of the output file used by your selected program.

Description

The description of the output file used by your selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column to type a dynamic free text filter for each column.
- 4 To view output file relations, click an output file name.

Viewing Util used by a program

Before you start, you must complete a program search task.

- On the Search Results tab, select a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- 2 On the bar at the top, click <u>Util</u> used to show all Utils used.

A new search result opens with this information:

Util Name

The name of the util used by your selected program.

Component

The component of util using your selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.
- 4 To view table relations, click a <u>Table Name</u>.

Viewing extension points used by a selected program

Before you start, you must complete extension points search task.

- 1 On the **Search Results** tab, select a <u>Program name</u>. A new search result opens with the header Program Relation Type: Total match.
- 2 Click Extension Points Used, to show the extension points used by your selected program.

Extension Point Name

The name of the extension point used by your selected program.

Component

The component of the extension point using your selected program.

Advice

The advice of the extension point used by your selected program.

Interface Name

The name of the interface.

- **3** Use these options to sort and filter your results.
 - Sort the results alphabetically or numerically by clicking the **Sort** icon located in one or more column headings.
 - Filter results by clicking the **Filter** icon in the last column and type a dynamic free text filter for each column.
- 4 To view extension points relations, click an Interface Name.

Viewing panels of a program

Before you start, you must complete a search task.

- On the Search Results tab, click a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- 2 On the bar at the top, click <u>Program</u> panels, to show all the panels used by your selected program. A new search result opens with this information:

Panel Name

The name of the panel used by your selected program.

Description

The description of the panel used by your selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column to type a dynamic free text filter for each column.

4 To view table field relations, click <u>View Table Fields Used</u>.

Viewing bookmark tables of a program

Before you start, you must complete a program search task.

- On the Search Results tab, select a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- **2** On the bar at the top, click Bookmark tables to show all the bookmark tables used. A new search result opens with this information:

Table Name

The name of the table used by your selected program.

Description

The description of the panel used by your selected program.

Component

The component of the panel used by your selected program.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a <u>Filter</u> action.
- 4 To view table relations, click a <u>Table Name</u>.

Viewing bookmark parameter of a program

Before you start, you must complete a program search task.

- On the Search Results tab, select a <u>Program name</u>.
 A new search result opens with the header Program Relation Type: Total match.
- 2 On the bar at the top, click <u>Bookmark</u> parameters to show all the bookmark tables used. A new search result opens with this information:

Param

The parameter identifier corresponding to a field in the program or view def.

Туре

Parameter type: ALPHA, NUMERIC, or DATE

Name

The name of the parameter

Description

The purpose of the parameter.

- **3** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
 - To view table relations, click a <u>Table Name</u>.

Viewing function parameter

Before you start, you must complete a program search task.

- On the Search Results tab, select a <u>Program name</u> to use.
 A new search result opens with the header Program Relation Type: Total match.
- 2 Click the link to <u>Function</u> parameters header.

A new search result opens with this information:

Param List Name

The name of the function parameter used your selected program.

When you click a Param List name link, a new search result window opens. It displays the available parameter names for this Param List name.

Param List Type

The type of this parameter.

Param List Details

The details for this parameter.

3 Optionally, you can click the <u>Export to Excel</u> icon to save the table list to an .xsl file.

Viewing source code

You can view the source code of a selected program in search results, using the view source code feature. You will find the view source code in one of the columns in the search results. View source code columns show in search results from **Programs used**, **Used by** and **Programs using** tabs.

Note: You will need a text and source code editor, such as Notepad, to view and open the specified source code file.

To view or download the source code of the specified program:

- 1 In Search by System Configuration, search for the target program.
- 2 On the <u>Search Results</u> tab, click the target program's source code icon in the source code column.
- 3 Click <u>Download</u> or <u>View</u>.

You can download the file by selecting download. MDP will download the source code java file to your default browser downloads folder. You can view the source code by selecting view. Your browser will display the source code.

Viewing Table and Column Relation Information

Use these procedures to view table and column relation information. Results from these procedures show entities tied to the selected table. These entities are table column, table index, join table, join index, programs and utils. Use these functions to view unique keys and foreign keys of the selected table.

Viewing columns used by a table

Before you start, you must complete a table search task. See <u>Searching for tables</u> on page 70.

- On the Search Results tab, select a <u>Table</u> name.
 A new search result opens with the header Table Relation Type: Total match.
- 2 On the bar at the top, click <u>Table Column</u> to show all the columns used by your selected table. A new search result opens with this information:

Column Name

Name of the column used by your selected table.

Description

Description of the column used by your selected table.

Data type

Data type of the column used by your selected table.

Length

Length of the column used by your selected table.

Decimals

Decimals of the column used by your selected table.

Edit Code

Edit Code of the column used by your selected table.

Index

List of index names for your selected table column.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a <u>Filter</u> action.

Viewing indexes of a table

Before you start, you must complete a table search task.

1 On the **Search Results** tab, click a <u>Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

2 On the bar at the top, click <u>Table Index</u> to show all the indexes of your selected table. A new search result opens with this information:

Index Name

Name of the index used by your selected table.

Unique

A "Yes" in this column indicates a unique index. There can only be one unique key for each table.

Key Info

Option to view index keys.

Condition Info

The condition information of an index.

Join Table

The join table of an index.

Join Condition

The join condition of an index.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view index key relations, click <u>View Index Keys</u>.

Viewing index keys

Before you start, you must complete a search task and display the search result for index relation information.

- 1 On the **Search Results** tab, select an <u>Index</u> name.
- **2** On Key Info column, click View Index Keys to display all the keys of your selected index. A new search result tab opens with this information:

Keys (Column name)

The name of the keys used by your selected index.

Description

The description of the keys used by your selected index.

Sort order

The ascending or descending sort order of the keys used by your selected index.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.

• To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.

Viewing Index Conditions

Before you start, you must complete a table search task and display the search result for index relation information.

- 1 On the **Search Results** tab, select an <u>Index</u> name.
- 2 On the Key Info column, click <u>View Index Conditions</u> to display all the keys of your selected index. A new search result opens with this information. Condition: Condition of your selected index.
- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing tables with the same unique keys

Use this procedure to view all the tables containing unique keys similar to your selected table.

Note:

The CONO and DIVI column keys are used by most of the BE tables. These keys are not included in the unique key comparison.

Before you start, you must complete a table search task.

1 On the **Search Results** tab, select a <u>Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

2 On the bar at the top, click <u>Same</u> unique keys to display all tables containing unique keys similar to your selected table.

A new search result opens with this information:

Table Name

The table name with unique keys similar to your selected table.

Description

The description of the table with unique keys similar to your selected table.

Key Info

The option to view the same unique keys with this table name.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.

- 4 To view more table relations, see <u>Viewing Table and Column Relation Information</u> on page 83.
- 5 To view same unique keys, see <u>Viewing same unique keys</u> on page 86.

Viewing same unique keys

Before you start, you must complete a table search task and display the index relation information on the Search Result tab.

- On the Search Results tab, select a <u>Table</u> name.
 A new search result opens with the header Table Relation Type: Total match.
- 2 On the bar at the top, click <u>Same Unique Keys</u> to display all the tables containing your selected index.
- 3 On Key Info column, click <u>View Same Unique Keys</u> to view the same unique key. A new search result named after your selected table to Same Unique Keys, opens with this

A new search result named after your selected table to Same Unique Keys, opens with this information:

Same Unique Keys (Column name)

The name of the unique keys used by your selected table.

Description

The description of the keys used by your selected table.

Sort order

The sort order of the keys used by the table you selected. Ascending or Descending.

- 4 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 5 You can also view table relations.

See <u>Viewing Table and Column Relation Information</u> on page 83.

Viewing tables with Foreign Key relation

Note: The CONO and DIVI column keys are used by most of the BE tables. These keys are not included in the unique key comparison.

Before you start, you must complete a table search task.

- On the Search Results tab, select a <u>Table</u> name.
 A new search result opens with the header Table Relation Type: Total match.
- 2 On the bar at the top, select <u>Foreign Keys</u> to display a list of selection with foreign keys used. A new search result opens with this information:

Table Name

The name of the table used by your selected program.

Description

The description of the panel used by your selected program.

Importance Rank

The total number of programs with semantic importance relation between two tables. To view programs of importance rank relation, click the importance rank number.

Key Info

An option to view foreign keys.

To view foreign keys relation, click View Foreign Keys.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing programs of importance rank

Use this procedure to view the importance rank of programs used by two tables in a specific pattern. Before you start, you must complete a table search task.

1 On the **Search Results** tab, select a <u>Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

- 2 On the bar at the top, select Foreign keys to display a list of selection with Foreign keys used.
- **3** On Importance rank column, click the number corresponding to your selected table to view the programs with importance rank relation.

A new search result opens with this information:

Program Name

Displays the program name that is used by both tables.

Description

The description of the program.

- 4 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing Foreign Key

Before you start, you must complete a table search task.

On the Search Results tab, select a <u>Table</u> name.
 A new search result opens with the header Table Relation Type: Total match.

- 2 On the bar at the top, select Foreign keys to display a list of selection with Foreign keys used.
- **3** On the Key Info column, click <u>View Foreign Keys</u> corresponding to your selected table to view. A new search result opens with this information:

Foreign Key

Displays the foreign key column name.

Description

The description of the panel used by your selected program.

Sort order

Shows the view order of foreign keys.

- 4 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing programs using a table

Before you start, you must complete a table search task.

1 On the **Search Results** tab, click a <u>Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

2 On the bar at the top, click <u>Program</u> using to display all programs using your selected table. A new search result opens with this information:

Program Name

The name of the program using your selected table.

Description

The description of the program using your selected table.

Component

The component of program using your selected table.

Usage

The usage type of the program using your selected table: Read, Update, and/or Delete.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view program relations, click a <u>Program</u> name.

Viewing function programs

Use this procedure to view programs that has maintain, archive, and delete functions on a selected table. Before you start, you must complete a table search task.

1 On the <u>Search Results</u> tab, click a <u>Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

2 On the bar at the top, click <u>Function</u> programs to display the function programs for your selected table.

A new search result opens with this information:

Maintained by pgm

The name on the function programs that is used to maintain data in a specific table.

Archiving function

The name on the function programs that is used to archive data in a specific table.

Mass Delete function

The name on the function programs that is used to delete all data in a specific table.

Viewing columns of a parent table

Use this procedure to view all the columns that belong to the same parent table of a selected table column. Before you start, you must complete a table search task.

1 On the **Search Results** tab, click a <u>Parent Table</u> name.

A new search result opens with the header Table Relation Type: Total match.

2 On the Parent table column, click an item across the column name of your selection. A new search result opens with this information:

Column Name

The name of the column used by your selected table.

Description

The description of the column used by your selected table.

Data type

The data type of the column used by your selected table.

Length

The length column used by your selected table.

Decimals

The decimals of the column used by your selected table.

Edit Code

The edit code of the column used by your selected table.

Indexes

The edit code of the column used by your selected table.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing Parameter List Relation Information

Use these procedures to view parameter list relation information. The relation information shows the fields used by the selected parameter and programs being used by the selected parameter.

Viewing fields used in a Parameter list

You must complete a search task before viewing fields in a parameter list.

1 On the **Search Results** tab, select a <u>Parameter</u> list name.

The search result header displays the Table Relation Type: Total match.

Field Name

The name of the field table used by your selected program.

Type The data type.

Length The string length.

Decimals

The decimals to display.

- **2** Use these options to manage the results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column and type a dynamic free text filter for each column.

Viewing programs used by Parameter list

Before you start, you must complete a search task.

- On the Search Results tab, select a <u>Parameter</u> list name. The search result header displays the Parameter list Relation Type: Total match. Additionally, the parameter fields used are also displayed.
- 2 On the bar at the top, select <u>Programs</u> used. A new search result opens with this information:

Program Name

The name of the program.

Description

The brief description of the program.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view program relations, click a <u>Program</u> name.

Viewing programs using Parameter list

Before you start, you must complete a search task.

1 On the **Search Results** tab, select a <u>Program</u> name.

A new search result opens with the header Parameter list Relation Type: Total match. Additionally, the parameter fields used are also displayed.

2 On the bar at the top, select <u>Used by</u>.A new search result opens with this information:

Program Name

Name of the program

Description

Brief description of the program

Component

Components of the program

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.
- 4 To view program relations, click a <u>Program</u> name.

Viewing Data Structure Relations Information

Use these procedures to view data structure relations information. The relation information shows the fields used by the selected data structure and the programs using the selected data structure.

Viewing Data Structure fields used

Before you start, you must complete a search task.

1 On the **Search Results** tab, select a data structure name.

The search result header displays the Data Structure Relation Type: Total match.

Field Name

The name of the field table used by your selected program

Туре

The data type.

Length The string length.

From The source.

То

The destination.

Decimals

The decimals to display.

- **2** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing programs using Data Structure

You must complete a search task before viewing programs using data structure.

1 On the **Search Results** tab, select a data structure name.

The search result header displays the Data Structure Relation Type: Total match. In addition, the field name, type, length, from, to, and decimal information are displayed.

2 On the bar at the top, select <u>Used by</u>. This information is displayed.

Program Name

The name of program used by the selected item.

Description

The brief description of the program.

Component

The program component.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view programs relations, click a <u>Program</u> name.

Viewing Output Files Record Format

Use these procedures to view output files record format. Relation information shows the record format of the selected output file and what programs are using the selected data structure, pages and programs using the selected output file.

Viewing output files record format

You must complete a search task before viewing output files in record format.

1 On the **Search Results** tab, select an output file name.

The search result header displays the Output file Relation Type: Total match.

Record Format Name

The name of the record format.

Stream The record format stream.

Type The record format type.

Record Format field info

Drill down to show the record format field information. You can also view the record format fields.

- 2 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.

Viewing Record Format Fields

You must complete a search task before viewing record format fields.

1 On the <u>Search Results</u> tab, under Record Format field info column, click <u>View Record Format</u> <u>Fields</u> to view the corresponding record.

A new search result opens with this field information:

Field name

The field name of your selected record format.

Data Type

The data type of your selected record format.

Length

The field length.

Decimals

The number of decimals in the field.

- 2 Before you start, you must complete a search task.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing output file pages

You must complete a search task before viewing output file pages.

1 On the **Search Results** tab, click <u>Pages</u> to view the output file page details of your selected record. The search result header displays the Output file pages Relation Type: Total match.

Page Name

The page name of your selected program.

Page field info

The page field information corresponding to a page name. Click this option to view page fields.

- 2 Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a <u>Filter</u> action.

Viewing Page Fields

You must complete a search task before viewing page fields.

1 On the **Search Results** tab, click <u>Pages</u> to view the output file page details of your selected record.

A new search result opens with the header Program Relation Type: Total match.

2 On the Page field info column, click <u>View Page Fields</u> corresponding to your selected page name to view.

A new search result opens with this field information:

Field Name

The name of the field for the selected page.

Stream

The page field stream.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.

Viewing programs using output file

Use this procedure to view Programs Using Output File of a selected program. Before you start, you must complete a program search task.

1 On the **Search Results** tab, click <u>Used by</u> to view the programs using your selected output File. A new search result opens with this information:

Program Name

The name of the programs in this selection.

Description

The brief description of the program.

Component

The program components.

Source Code

Shows the source code of a selected program.

- **2** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- **3** To view programs relations, click a <u>Program</u> name.

Viewing Util Relations Information

Use these procedures to view Util relations information. Relation information shows the tables used, programs used, programs using relations and Utils used by the selected Util.

Viewing tables used by a Util

You must complete a search task before viewing tables used by a Util.

- 1 On the Search Results tab, click a <u>Util</u> name.
- 2 On the new search result, click <u>Tbl</u> used to display all tables used by your selected <u>Util</u> with this information:

Table name

The name of the table used by the Util you selected.

Description

The description of the table used by the Util you selected.

Usage

The function of the table used by the Util you selected: Read, Update, and/or Delete.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view table relations, click a table name.

Viewing programs used by a Util

Before you start, you must complete a program search task.

- 1 On the <u>Search Results</u> tab, click a <u>Util</u> name.
- 2 On the new search result, click <u>Pgm</u> used to display all programs used by your selected <u>Util</u> with this information:

Program name

The name of the program used by the Util you selected.

Description

The description of the program used by the Util you selected.

Component

The component of the program using the Util you selected.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view <u>Util</u> program relations, click a program name.

Viewing programs using Util

Before you start, you must complete a program search task.

- 1 On the **Search Results** tab, click a <u>Util</u> name.
- 2 On the new search result, click <u>Used by</u> to display all programs using your selected <u>Util</u> with this information.

Program name

The name of the program used by the Util you selected.

Description

The description of the program used by the Util you selected.

Component

The component of the program using the Util you selected.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, type a dynamic free text filter for each column and select a <u>Filter</u> action.
- 4 To view <u>Util</u> program relations, click a program name.

Viewing utils used by Util

Before you start, you must complete a search task.

- 1 On the **Search Results** tab, click a <u>Util</u> name.
- 2 On the new search result, click <u>Util</u> used to display all <u>Utils</u> using your selected <u>Util</u>. A new search result opens with this information:

Util name

Name of the Util used by the Util you selected.

Component

Component of the Util using the Util you selected.

- **3** Use these options to sort and filter your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon located in one or more column headings.
 - To filter the results, specify a dynamic free text filter for each column and select a Filter action.
- 4 To view <u>Util</u> relations, click a <u>Util</u> name.

Viewing Extension Points Relation Information

Use these procedures to view extension point relation information. The relation information shows the extension points by the selected interface and programs being used by the selected parameter.

Viewing extension points in an interface

Before you start, you must complete extension points search task. See <u>Searching for Extension Points</u> on page 73.

- 1 On the **Search Results** tab, select an Interface name.
- **2** A new search result opens with the header Extension Points: Total match.

Extension Point Name

The name of the extension point in the selected interface.

Description

The description of the extension point in the selected interface.

Advice

The advice of the extension point in the selected interface.

- **3** Use these options to sort and filter your results:
 - Click the <u>Sort</u> icon located in one or more column headings to sort the results alphabetically or numerically.
 - Filter results by clicking the <u>Filter</u> icon in the last column and type a dynamic free text filter for each column.

Viewing programs using Extension Points

You must complete a search task before starting.

- 1 On the **Search Results** tab, select an Interface name. A new search result opens with the header Extension Point Relation Type: Total match. Additionally, the extension points are also displayed.
- 2 On the bar at the top, select Used by. A new search result opens with this information:

Program Name

Name of the program.

Description

Brief description of the program.

Component

Shows the components of the program.

Source Code

Shows the source code of a selected program.

- **3** Use these options to sort and filter your results:
 - Click the <u>Sort</u> icon located in one or more column headings to sort the results alphabetically or numerically.
 - Filter results by clicking the <u>Filter</u> icon in the last column and type a dynamic free text filter for each column.

M3 function tool

MDP features a UI-based test tool for M3 function programs. This tool serves as an educational tool for developers learning how to call the REST services function (Fnc). This tool is used to:

- Provide developers a tool to test M3 Fnc-programs
- Reproduce and test defects reported by customers
- Learn how Fnc-REST services work
- Provide client developers a tool for exploring Fnc-REST services, such as metadata and behavior, while developing client applications.

Execute mode

You can do Fnc-REST calls using execute and interact modes. Execute is appropriate for machine integrations and corresponds to <resource path="service/execute">in the application.WADL.

Execute mode is basically a one shot call with one request and one response. You can separately ask for metadata (metadataMode="MetadataExcluded") using this function.

To display any MDP program information, errors and notifications using execute mode, follow these steps:

- 1 From the MDP opening page, click **M3 Function > Fnc Development Client**.
- 2 From the Fnc Development Client sidebar, specify these fields:

Program

Shows the available function programs.

Param List

Shows the available parameters.

Maintain Mode

Shows the available maintain mode options.

3 Click **Execute** to show the **service/execute** tab with the results showing any notifications and errors.

Interact mode

The second type of Fnc-REST call is the interact mode. Interact is a stepwise call involving steps, preparing, initiation, and update. You can update multiple times until you no longer receive any errors.

To display any MDP program information, errors and notifications using interact mode in the results screen, follow these steps:

- 1 From the MDP opening page, click **M3 Function > Fnc Development Client**.
- 2 From the Fnc Development Client sidebar, specify these fields:

Program

Shows the available function programs.

Param List Shows the available parameters.

Maintain Mode

Shows the available maintain mode options.

- 3 Click Interact to show the service/execute tab.
- 4 Specify the required information.
- 5 Click **Send** to show the results.

The information retrieved based on the user inputs is now displayed.

Tracing communications

Tracer displays all the rest calls used by MDP to connect to M3 Foundation. You can use tracing communications to copy requests and responses to the windows clip board.

You can view the history of the textual requests and responses using **Tracer**. This gives you a detailed understanding of how the Fnc-REST model works.

To trace a REST call, follow these steps:

- 1 From the MDP opening page, click **M3 Function > Fnc Development Client**.
- 2 Click the Tracer tab.
- Specify the REST call you like to trace from the drop-down menu.
 Tracer will now display the content in the **Request** and **Response** windows.

M3 API Repository

M3 API repository has two functions, Search API and Test API. The repository function connects to the M3 Foundation client to display the information.

M3 API Repository Functionalities

The M3 API repository function displays the list of transactions and the inbound or outbound fields related to the MI Program.

Search API

Search API displays the list of generated MI Programs.

Table heading	Description
Program	The program used by this MI Transaction.
Program description	The brief description of the program.

Viewing MI Transaction

You can view the MI Transaction with these steps.

- 1 Click M3 API Repository tab.
- 2 Click Search API.
- 3 Select on <u>MI Program Name</u> link: A new tab is displayed with this information.

Transaction Name

The name of the transaction.

Description

A brief description of the transaction.

Viewing MI Transaction Inbound or Outbound Fields

- 1 Complete the task <u>Viewing MI Transaction</u> on page 101.
- 2 On the Selected MI Program tab, select a Transaction name and click the link to view the fields. View Inbound Fields or View Outbound Fields

A new search result opens with the selected transaction name and <In/Out>bound fields (Total match).

Field

The name of this field.

Description

A brief description of this field.

From

The program used by this MI Transaction.

То

The program used by this MI Transaction.

Length

The inbound field length in number of characters.

Mandatory

Indicates whether the MI Transaction on this row is mandatory or not.

Туре

Indicates the field type.

- **3** Optionally, click the <u>Export</u> icon to save this table search result on an .xls file.
- 4 Use these options to manage your results.
 - To sort the results alphabetically or numerically, click the <u>Sort</u> icon on the column headings.
 - To filter the results, click the <u>Filter</u> icon in the last column and type a dynamic free text filter for each column.

Test API

Test API runs the transaction of the selected MI Program. Use this function to test the MI Program's functionality. MDP cannot verify the MI Content since MDP only calls the MI Foundation Services.

Running of MI Transaction

- 1 Click M3 API Repository tab.
- 2 Click Test API.
- 3 Select **MI Program** from the Program list.
- 4 Click **Select** button.
- 5 Click **MI Transaction** from <u>Transaction List</u>.
- 6 Input the required MI fields (those in bold text).
- 7 Click Run.

Show as REST

Show as REST is a URL that shows the response coming from the M3BE FND depending on the input made from <u>Running of MI Transaction</u>.

- 1 Complete the task Running of MI Transaction.
- 2 Click <u>Show as REST</u> link.
- 3 Click Copy to Clipboard.
- 4 Open a new tab and paste the copied link.

MDP REST APIs

MDP REST APIs are REST services that are used to get metadata information. These are called through ION API. All APIs' response type are XML and in JSON.

Here is a sample response code.

Status Code	200
Message	Successful Operation

These are the REST services.

Metadata

Use these REST APIs to get metadata information.

- 1 les/getColumnsUsedByTable/{tableName}/{component}
 - a Request Type: Get
 - **b** Description: Get columns used by a specific table which will return the same data in the MDP Client.
 - c Parameters:
 - 1 name : tableName

Details	Value
in:	path
description:	Table Name
required:	true
type:	string

2 name : component

Details	Value
in:	path

Details	Value
description:	Component
required:	true
type:	string
default:	MVX

3 name : langld

Details	Value
in:	query
description:	Language ID
required:	false
type:	string
default:	GB
x-example:	GB

2 les/getIndexKeys/{indexName}/{component}

- a Request Type: Get
- **b** Description: Get Index Keys
- c Parameters:
 - name : indexName

Details	Value
in:	path
description:	Index Name
required:	true
type:	string

• name : component

Details	Value
in:	path
description:	Component
required:	true
type:	string
default:	MVX

• name : langld

Details	Value
in:	query
description:	Language ID
required:	false
type:	string
default:	GB
x-example:	GB

- 3 les/getPrograms
 - a Request Type: Get
 - **b** Description: Get programs
 - c No Parameters
 - d Disclaimer This will return a large response and is not suitable to run in a browser
- 4 les/getReferenceFields
 - a Request Type: Get
 - **b** Description: Get Reference Fields
 - c No Parameters
 - d Disclaimer This will return a large response and is not suitable to run in a browser
- 5 les/getTables
 - a Request Type: Get
 - **b** Description: Get all tables
 - c No Parameters

Table metadata

Use these REST APIs to get standard table metadata information.

- 1 analytics/getMetadataVersion
 - a Request Type: Get
 - **b** Description: Get the metadata version
 - c No Parameters
- 2 analytics/getTableColumns
 - **a** Request Type: Get
 - **b** Description: Get base table columns (MVX) with key count, mandatory flag, and the usual data in this entity.
 - c No Parameters
 - d Disclaimer This will return a large response and is not suitable to run in a browser
- 3 analytics/getTables
 - a Request Type: Get
 - b Description: Get Standard (MVX) Tables
 - c No Parameters

Relations

Use these REST APIs to get entity relation information.

- 1 relations/tables/getTableWithForeignKeys/{beSystem}/{tableName}/{component}/{langId}
 - a Request Type: Get
 - **b** Description:
 - c Parameters
 - name : beSystem

Details	Value
in:	path
description:	BE System
required:	true
type:	string

• name : tableName

Details	Value
in:	path
description:	Table Name
required:	true
type:	string

• name : component

Details	Value
in:	path
description:	Component
required:	true
type:	string
default:	MVX

• name : langld

Details	Value
in:	path
description:	Language Id
required:	true
type:	string

Details	Value
default:	GB
example:	GB

- 2 relations/tables/viewForeignKeys/{beSystem}/{tableName}/{component}/{parentTableName}/{langId}
 - a Request Type: Get
 - **b** Description:
 - c Parameters
 - name : beSystem

Details	Value
in:	path
description:	BE System
required:	true
type:	string

• name : tableName

Details	Value
in:	path
description:	Table Name
required:	true
type:	string

• name : component

Details	Value
in:	path
description:	Component
required:	true
type:	string
default:	MVX

• name : parentTableName

Details	Value
in:	path
description:	Parent Table Name
required:	true

Details	Value
type:	string

• name : langld

Details	Value
in:	path
description:	Language Id
required:	true
type:	string
default:	GB
example:	GB

Limitations

MDP functions have bandwidth limitations that affect system performance. To maximize performance, understand these topics to reduce the issues caused by these limitations.

M3 Metadata Publisher Limitations

The current version of M3 Metadata Publisher has certain limitations. For a better response time when using your supported browser to access MDP client, we recommend that you limit your open search results to ten.

MDP cannot verify the MI Content since MDP only calls the MI Foundation Services.
Appendix A: Hot keys

Hot keys are shortcuts that you can perform using keystrokes.

General hot keys in M3 programs

The hot keys listed in this section are applicable regardless of the current panel you are working with.

Keystroke	Action
Esc	Closes these objects:
	context menus
	opened windows
	notifications/messages
Enter	Simulates the action of the Next button
Tab	Moves the cursor between input fields and but- tons
Ctrl + R, Ctrl + S	Runs the Start and Search field
	Note: In the new H5 UI, this hot key runs the Start field.
Alt + S	Opens the application menu and positions the Start textbox
Ctrl + Shift + Page Down	Switches to the next application in the taskbar
Ctrl + Shift + Fn + Down (in Mac OS)	
Ctrl + Shift + Page Up	Switches to the previous application in the taskbar
Ctrl + Shift + Fn + Up (in Mac OS)	
Ctrl + C	Copies text
command + C (in Mac OS)	
Ctrl + V	Pastes text
command + V (in Mac OS)	

Ctrl + X	Cuts (deletes) text
Ctrl + [number]	Selects an option from the Options menu or from the Related menu
Alt + A	Opens the Actions menu
Ctrl + Option + A (in Mac OS)	
Alt + R	Opens the Related menu
Ctrl + Option + R (in Mac OS)	
Alt + O	Opens the Options menu
Ctrl + Option + O (in Mac OS)	
Alt + T	Opens the Tools menu
Ctrl + Option + T (in Mac OS)	
Ctrl + Q	Opens the context menu
command + Q (in Mac OS)	
(Ctrl+ ~)	Switches to the last active M3 program
Ctrl + Shift + E	Switches to Homepages
F1*	Displays the Help tool
F3*	Closes the application
F4*	Displays the browse dialog box
F5*	Refreshes the form
F6*	Enables text entry
F7*	Displays previous record
F8*	Displays next record
F9*	Opens Field Audit Trail
F10*	Displays next view for sorting order
F12*	Returns to the previous panel field
F13*	Displays the settings panel
t	Add today's date to the keyboard focused date picker
Up/Down Arrow	Opens combo boxes which allows selection from the list.
Swipe Left	Simulates Next button
Swipe Right	Simulates Previous button

(*) The keys on the top row of a Mac keyboard are configured to behave as standard function keys. Select **System Preferences > Keyboard**. On the **Keyboard** tab, select "Use all F1, F2, etc. keys as standard function keys."

Additional configuration must be done for F10 and F12. Select **Keyboard Shortcuts** tab and clear **Application windows** and **Show Dashboard** check boxes.

Hot keys for list panels

The hot keys listed in this section are applicable only when you are in a list panel.

To apply a specific option to the selected rows, you must keep the **Ctrl** key pressed until the option is selected.

Keystroke	Action
Home	Selects the first record
fn + Left Arrow (in Mac OS)	
End	Moves toward the end of a list in larger incre-
fn + Right Arrow (in Mac OS)	ments
Delete	Removes a selected record from a list
fn + Delete (in Mac OS)	
Shift + Down Arrow	Includes the next row in the selection
Shift + Up Arrow	Includes the previous row in the selection
Shift + Page Down	Selects the cells on the page below the cell in
fn + Shift + Down Arrow (in Mac OS)	focus
Shift + Page Up	Selects the cells on the page above the cell in focus
fn + Shift + Up Arrow (in Mac OS)	
Ctrl + D	Opens the Edit Panel Sequence dialog box in Direct Change mode
Ctrl + L	Moves the focus to the list
Ctrl + Down Arrow	Keeps the selection and moves the cursor one row down
control + command + Down Arrow (in Mac OS)	
Ctrl + Up Arrow	Keeps the selection and moves the cursor one row up
control + command + Up Arrow (in Mac OS)	
Ctrl + Space	Includes the row in focus in the selection (to get a split selection)

Keystroke	Action
Ctrl + [number]	Selects an option from the Options menu or from the Related menu
Ctrl + [number] + Up/Down Arrow	Moves to the next/previous valid option
Ctrl + [number] + Backspace	Cancels the last number specified
-or-	
Ctrl + [number] + Delete	
Ctrl + Backspace	Cancels the last number specified
Ctrl + F11	Shows or hides the extra row in an expandable list
Page Down	Scrolls one page down in a list
fn + Down Arrow (in Mac OS)	
Page Up	Scrolls one page up in a list
fn + Up Arrow (in Mac OS)	
Up Arrow	Moves the cursor upwards
Down Arrow	Moves the cursor downwards
Left Arrow	Scrolls to the left
Right Arrow	Scrolls to the right
Tab	Moves focus to the next editable cell in an ed- itable list
Shift + Tab	Moves focus to the previous cell in an editable list