Infor Worktop 2.5

Configuration Guide for Infor ERP Baan IV - Baan 5.0c - ERP Enterprise (LN)

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About this guide

This document is a Configuration Guide that describes the configuration of Worktop 2.5.

This document contains the following chapters:

Chapter 1, “Introduction,” provides an introduction to Worktop 2.5 and lists the definitions, acronyms, and abbreviations used in this document.

Chapter 2, “To configure Worktop 2.5,” provides detailed information about how to configure Worktop 2.5.

Appendix A, “Configuration Q&A,” provides questions and answers on some common issues on the Worktop 2.5 configuration.

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Chapter 1 Introduction

1

Worktop is the user interface for various Infor ERP products. Worktop provides an easy-to-use and intuitive view that hides the complexity of the software used.

Definitions, acronyms, and abbreviations

Term	Description
Infor ERP	• Baan IVc4 • Baan 5.0c • Baan 5.2 • ERP Enterprise
DEM	Dynamic Enterprise Modeling
ERP	Enterprise Resource Planning
.wtd file	Worktop Document
BW	Baan Windows
BWC	Baan Windows Configuration
Administrator	User logged on to a machine on which Worktop is installed locally

References

Document	Abbreviation
ERP Enterprise Central Deployment for DEM and Baan Windows	[CD_DEM_BW]
Infor ERP Baan Windows Client Installation Guide	[WCIG]
Worktop 2.5 Administration Guide	[WT_ADM]
Worktop 2.5 Configuration Guide	[WT_CFG]

Chapter 2 To Configure Worktop 2.5

2

To define Worktop authorization

Before you can use Worktop, you must define authorization for the following components:

- Menu Browser.
- Baan Process Browser.
- Baan Workflow.

Note: Worktop 2.4 is the first Worktop version that supports Workflow. Workflow is supported for ERP Enterprise back ends.

For any user, authorization is defined in Infor ERP.

Various methods are available to define authorization, dependent on which version of Infor ERP you use.

To define authorization for Infor ERP Baan IVc, start the Maintain User Data (ttaad2100m000) session and click the **Startup** tab.

For all other versions you can define authorization by starting the User Data (ttaad2500m000) session and double-click the user to set authorization. The User Data (ttams1100s000) session starts.

To define authorization in the **Worktop Tree** group, select the check box for each component.

To put your changes into effect, click **Convert Changes to Runtime DD** on either the **Special** menu in Infor ERP Baan IVc, or the **Specific** menu in ERP Enterprise in the User Data session. After you convert to run time, reopen the Worktop document to restart BW to put the changes into effect.

The following figures provide three examples of the sessions used for authorization.

To change Worktop authorizations in Infor ERP Baan IVc:

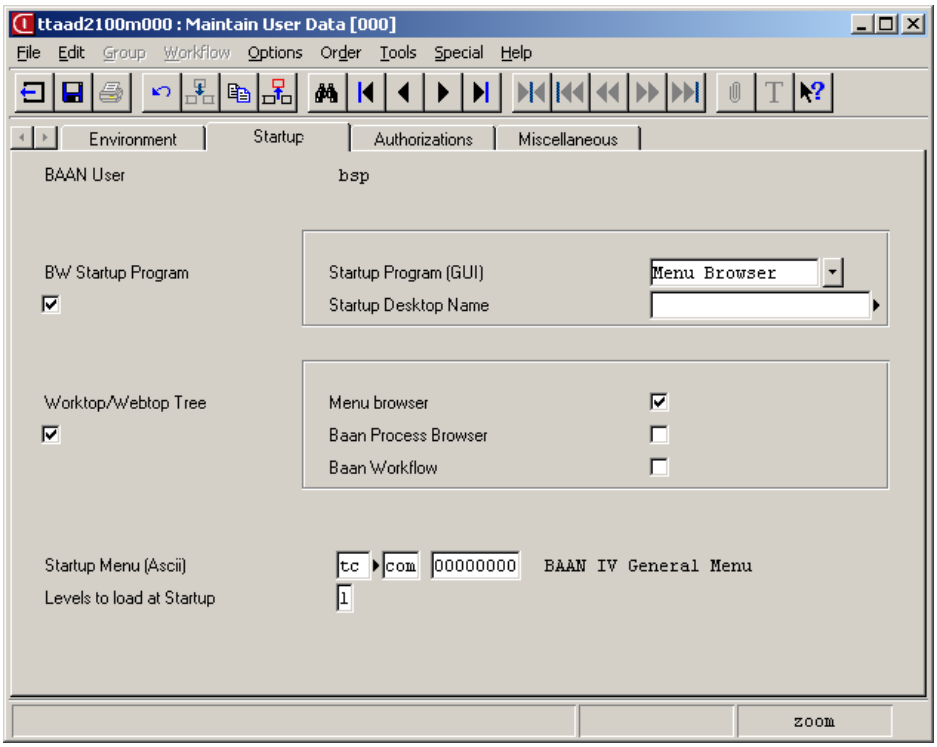


Figure 0-1 Maintain User Data (ttaad2100m000) Startup Tab

To change the Worktop authorizations in Infor ERP Baan 5.0c:

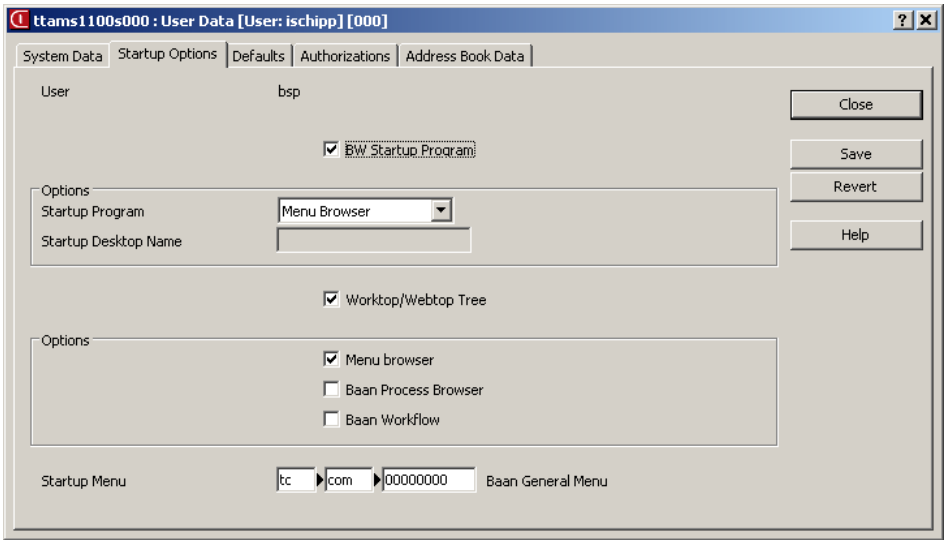


Figure 0-2: User Data (ttams1100s000) Startup Options Tab.

To change Worktop authorizations for Infor ERP Baan 5.2a:

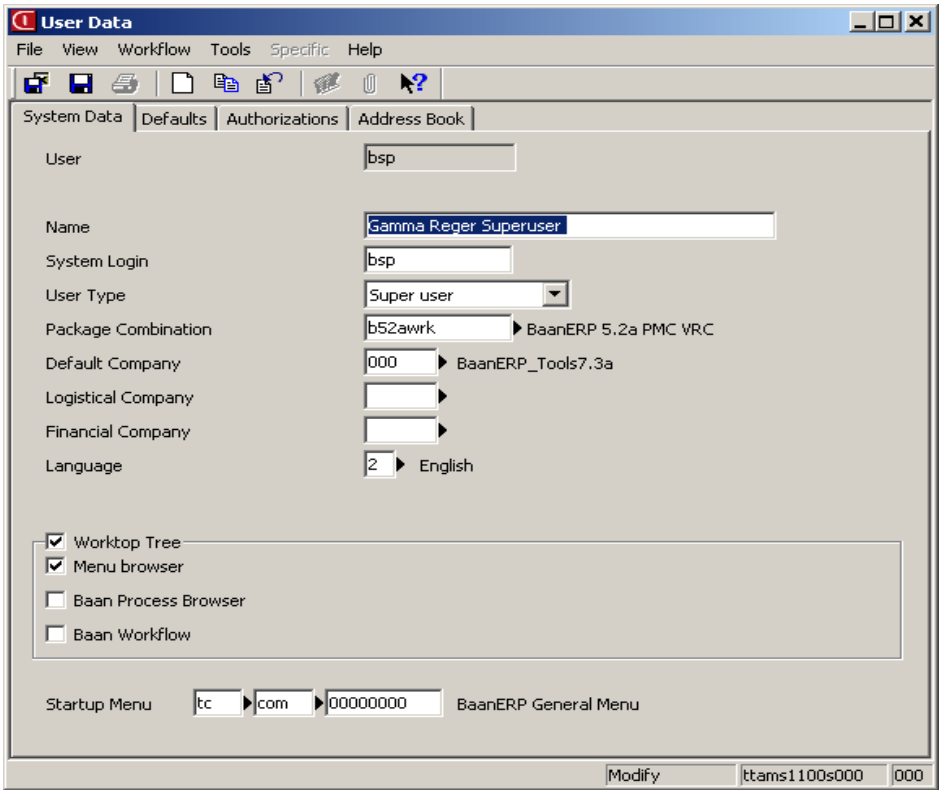


Figure 0-3: User Data (ttams1100s000) System Data Tab.

Note that the **Startup Options** tab is removed for ERP Baan 5.2a.

To change authorizations for Infor ERP Enterprise and up:

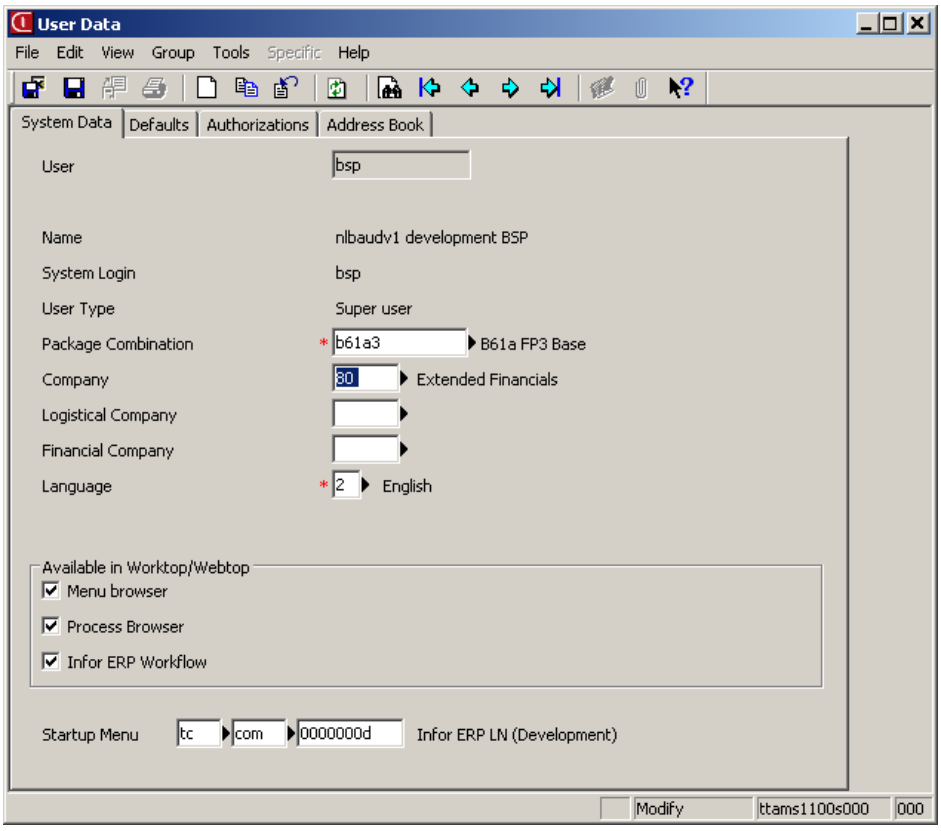


Figure 0-4 User Data (ttams1100m000) System Data Tab

To enable Help text

To view the Help text provided in the Process Browser on Infor ERP Baan IV, you must make an entry in the Maintain Default Text Group by User (tttxt1113m000) session, or (tttxt1113m000) in Infor ERP Baan IVc. For Infor ERP Baan 5.0c and higher, no special settings are required.

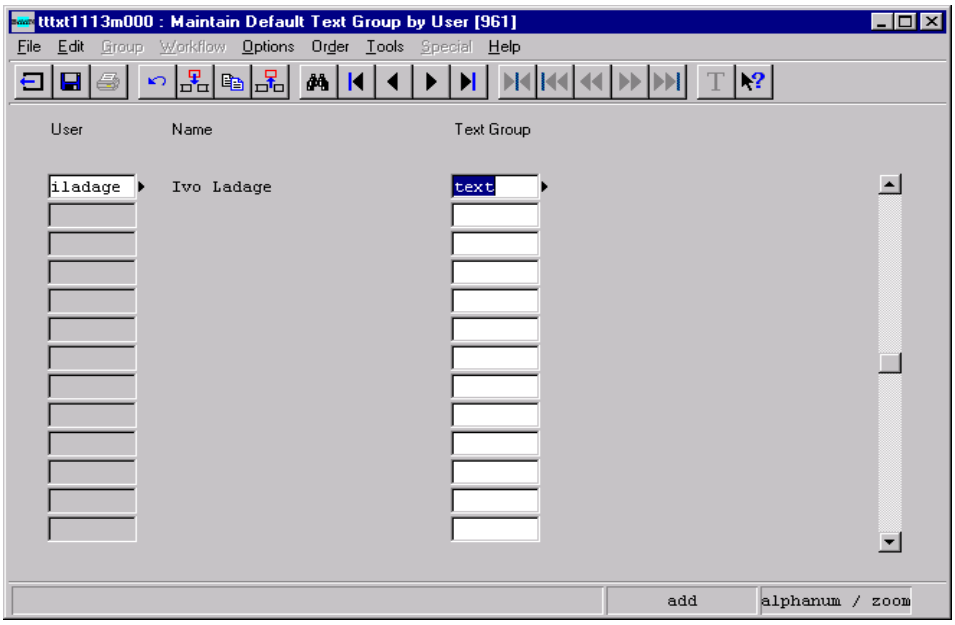


Figure 0-5: Maintain Default Text Group by User tttxt1113m000

To configure Worktop documents

To configure Worktop 2.5, create a Worktop document. A Worktop document contains all server configuration information and user interface configuration information, and is the actual Worktop working environment. “To convert old Worktop documents,” describes the conversion of Worktop documents created by earlier Worktop versions to the current version.

“To create new Worktop documents,” describes how to create a new Worktop document in Worktop 2.5. “To delete Worktop documents,” describes the deletion of Worktop documents. Finally, “To change server configurations of an existing Worktop document,” describes how to change server configuration settings of an existing document.

To convert old Worktop documents

Worktop 2.5 can open documents created by Worktop version 2.4/ 2.3/2.2/2.1, but does not support documents created with earlier versions. The reason for this is because numerous changes have been made in the architecture of Worktop documents from Worktop 2.0 to 2.1 to support Central Deployment.

Although you can reuse a Worktop document created by a 2.2/2.1 version of Worktop, Infor recommends that you create a new Worktop document in Worktop 2.5. A document created by Worktop 2.5 will contain additional information, which enables automatic error solving.

To create new Worktop documents

To create a new Worktop document, based on a user's working environment, in the Worktop application, on the **File** menu, click **New**.

Note: When you start Worktop for the very first time, the Wizard appears automatically.

Authorization to create a Worktop document is derived from the authorization granted in Infor ERP, as described in "To define Worktop authorization" in Chapter 2, "To configure Worktop *2.5*." If the Worktop component authorization of this user differs from the user's authorization in Infor ERP, the user will be notified of this fact only once.

To create a Worktop document, the Wizard guides you through the following steps:

1 Click **Next** on the **Welcome** dialog box. The **BW Configuration** dialog box appears.

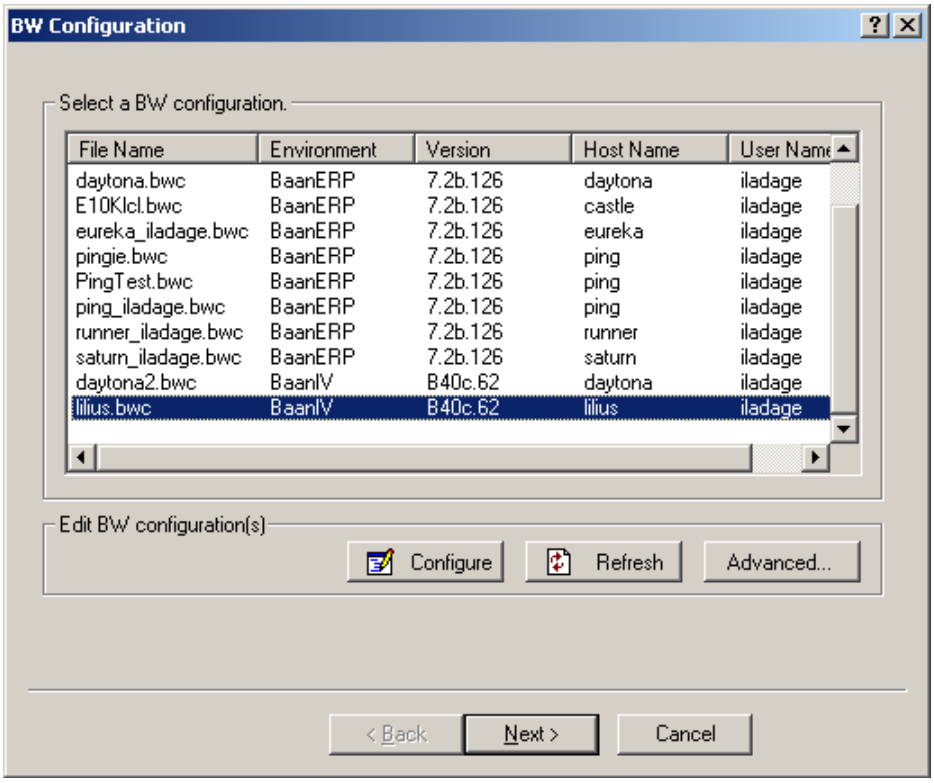


Figure 0-6: BW Configuration dialog box

2 Select the Baan Configuration (BWC) file you want to use in this Worktop document in the **Select a BW Configuration** group box.

3 Click **Next** to continue.

To edit the BW configuration files, you can use the following three buttons in the **Edit BW Configuration(s)** group box:

- **Configure:** Enables you to edit the currently selected BW configuration file in the upper list box.

- **Refresh**: Refreshes the list of BW configurations present on your system, which is useful when you edit the BW configuration files outside Worktop, using BECS for example.
- **Advanced**: Launches BECS, which enables you to organize your BW configuration files, for example, to create new BW configuration files, to remove existing BW configuration files, and so on.

After you select the BW Configuration you want to use in this Worktop document, Worktop connects to the Infor ERP back end. If you did not save the password in the BW Configuration file, the following login dialog box appears:

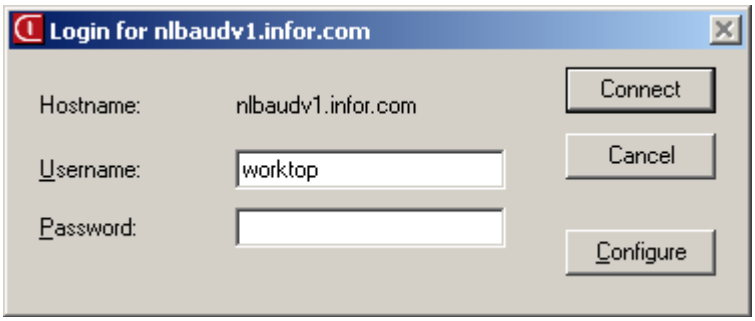


Figure 0-7: Login dialog box

4 Enter the user name and password with which you want to log on and click **Connect**.

Note: The login can differ from the login saved in the BW configuration file.

After you successfully connect to the Infor ERP back end, the user authorization is calculated. If no Worktop authorization is defined at all for the Baan user, a message appears that asks if you want to define authorization.

5 Click **Define** to start the User Data (ttams1100s000) session, from which you can define the authorization. For more information about this topic, refer to “To define Worktop authorization,” previously in this chapter.

The following message appears:

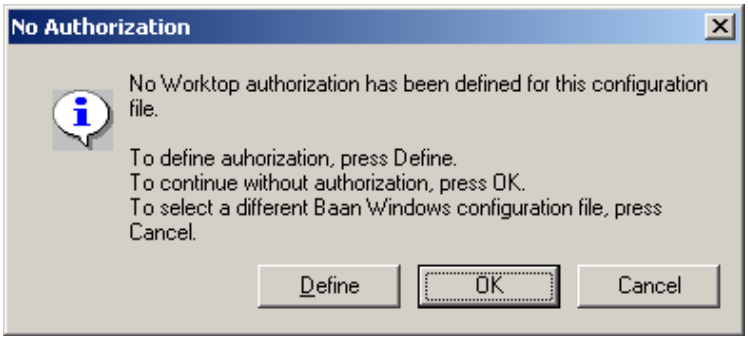


Figure 0-8: No Authorization message

6 Click **OK** to continue the setup if you do not want to define any authorization.

7 Click **Cancel** to return to the previous dialog box in the wizard.

If the user has no Worktop authorization for the Baan Process application, the Wizard will continue with Step 11. Otherwise, the **Dynamic Enterprise Modeling Configuration** dialog box appears:

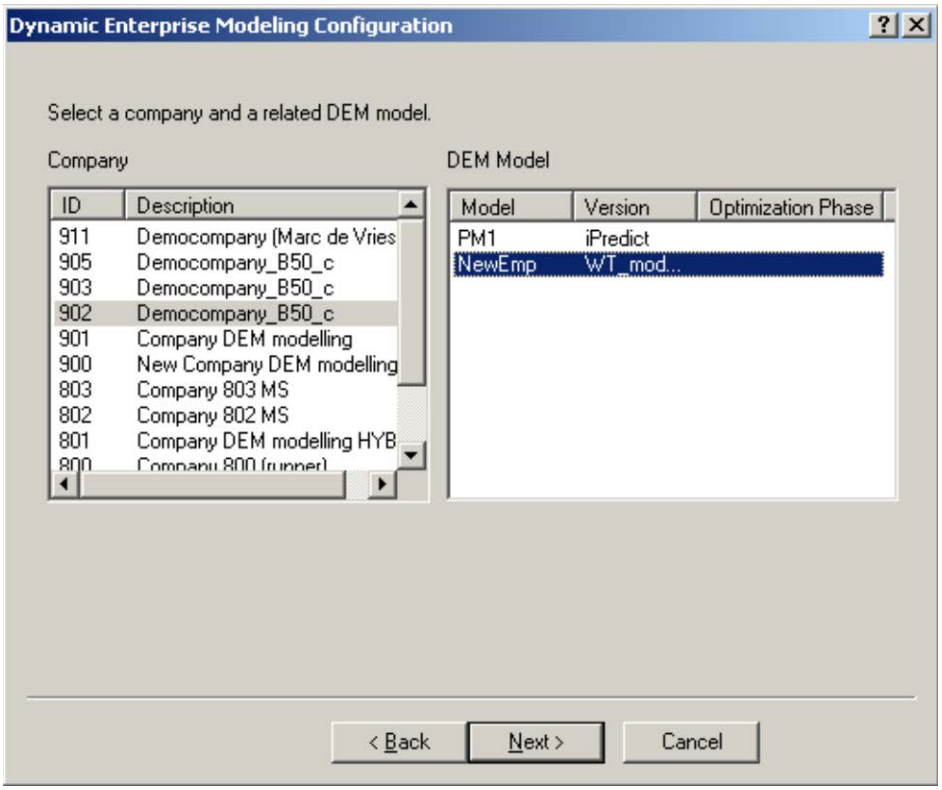


Figure 0-9: Dynamic Enterprise Modeling Configuration dialog box

8 Select the DEM company you want to work with in the left pane of the dialog box. After you select the DEM Company, all Version/Project Model/Optimization Phase combinations, for example, DEM models for which the user is authorized, appear in the right pane of the dialog box.

9 Select the DEM model you want to use in this Worktop document.

10 After you select both the DEM company and DEM model, click **Next**.

11 If the user has no Worktop authorization for Workflow, the Wizard continues with Step 14. Otherwise, the following dialog box appears:

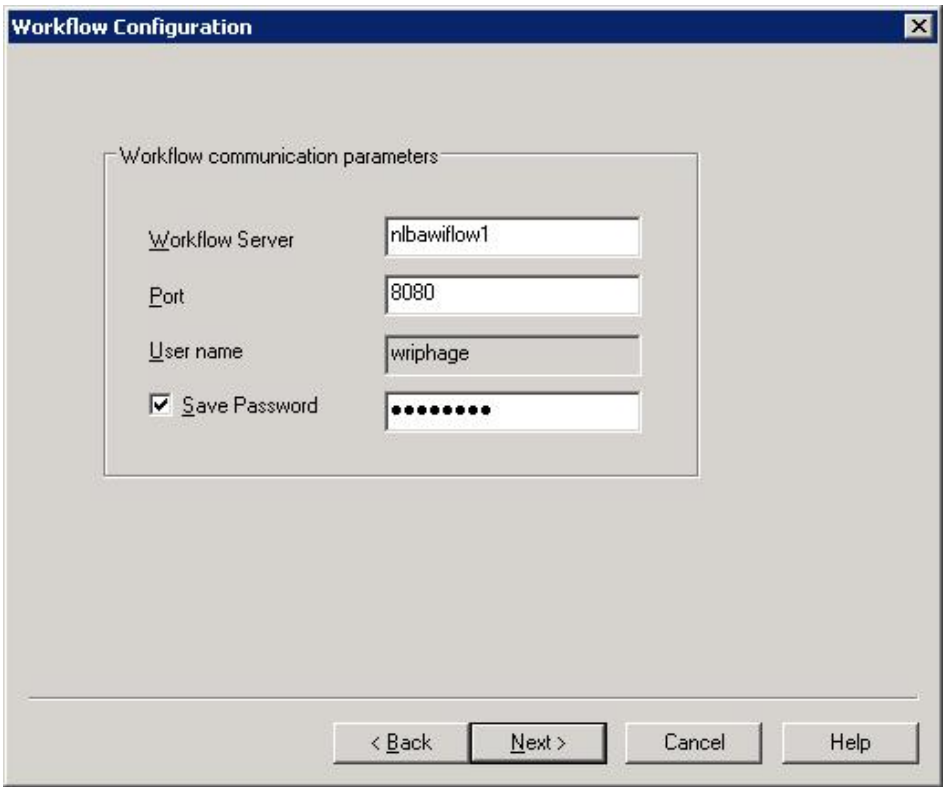


Figure 0-10: Workflow Configuration dialog box

12 Fill in the host name of the server where the Workflow engine must be filled in the **Workflow Server** field. Note that the user name is set identical to the Infor ERP user name and cannot be modified by the user.

The password that is required to log on to the Workflow server can be saved in the Worktop document. Therefore the **Save Password** check box must be selected and the password can be filled in the corresponding field. The password the user enters will be stored, in encrypted format, in the Worktop document.

With Worktop two versions of the Workflow integration component are shipped. If these versions are not correct Worktop can download the correct version via a web application (wfupdate). For this to work you need to specify the Port on which this web application listens. Default 8080 is used.

13 After you complete this form, to finish the creation of a new Worktop document, click **Next** and then Click **Finish**.

To delete Worktop documents

Because a Worktop document actually consists of multiple files, deleting only the .WTD file with the explorer does not completely delete the Worktop document. Deleting the .WTD file only renders the

Worktop document unusable. To delete Worktop documents, use the **Delete Worktop Documents** option on the **Administrator** menu in Worktop.

The **Delete Worktop Documents** dialog box appears, as shown in the following figure:

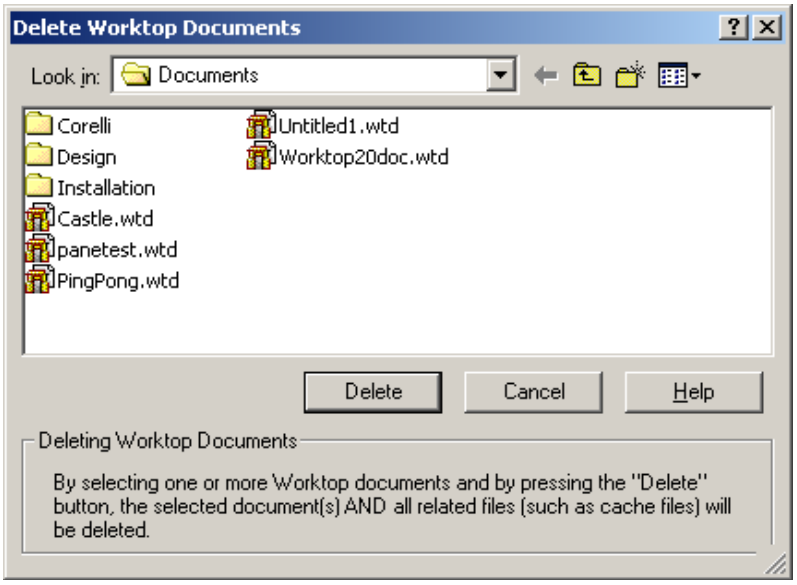


Figure 0-11: Delete Worktop Documents dialog box

To delete a Worktop document, select the document and click **Delete**. You can also select multiple documents and delete the documents simultaneously.

To change server configurations for an existing Worktop document

A Worktop document contains various types of server configurations. To change these characteristics in an existing document, take the following steps:

To modify the Baan Windows configuration

To change the contents of a BWC file, on the **Administrator** menu, click **Modify current BW configuration** to open the properties of the BWC file used in the current Worktop document. After you make changes, you must close and reopen the Worktop document to put the changes into effect.

To use the new Baan Windows Configuration

To use a newly created BWC file, you must always create a new Worktop document. You can select the required BWC file during the creation of the document, however, you cannot change the file afterwards.

To make changes in the Project Model

If you make changes in the Project Model used in a Worktop document, Worktop automatically applies these changes when you reopen the document in which this project model is used. Alternatively, you can refresh the Baan Process Browser to apply the changes without reopening the Worktop document.

To use a different DEM modeling company, Version, Project Model, or Optimization Phase

To use a different DEM modeling company, Version, Project Model, or Optimization Phase, you must always create a new Worktop document. You select these parameters when you create the Worktop document and you cannot change these parameters afterwards.

To change Workflow configuration settings

To change Workflow communication parameters of an existing Worktop document, you must first open the document. On the **Tools** menu, click **Options** to open the **Options** dialog box. A **Workflow** tab appears, on which you can modify Workflow settings.

Appendix A Configuration Q&A

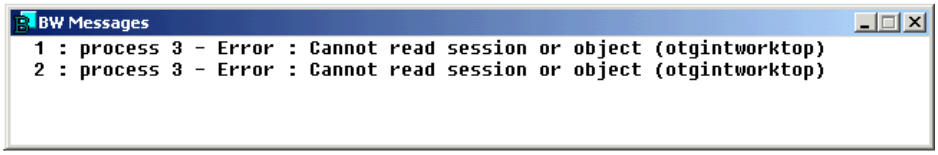
A

Q: No Menu Browser available

A: Check in the User Data session (see begin chapter 2) if, for the applicable user, the Menu Browser is enabled and made run-time.

There is also a setup.ini parameter MBAccessAlways that you can use to override the User Data setting. If set to 1 the Menu Browser will be available even if the User Data setting says otherwise.

Q: After I configure authorization and start the Worktop, the following BW messages appears:



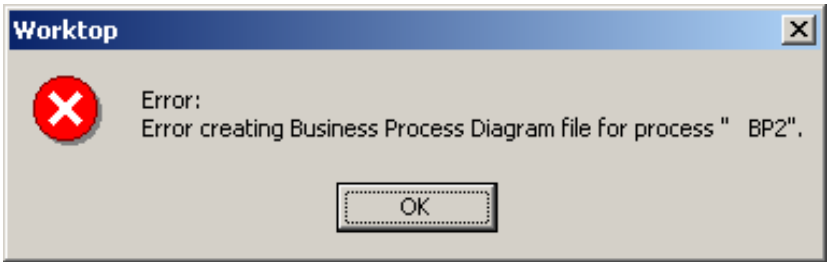
A: This message signifies that, although authorization was granted for the Process Browser, the Process Browser could not be shown because the DEM component on the server is missing. To use the Process Browser, the server must have the DEM package installed.

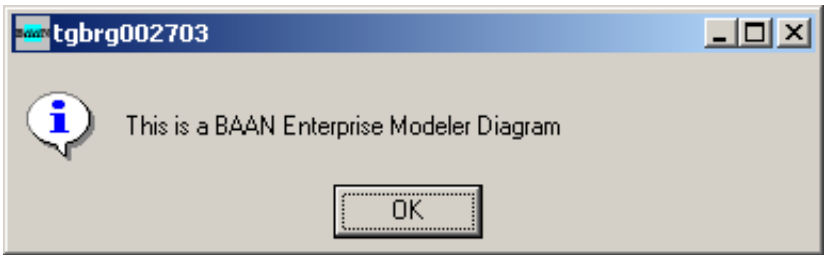
Q: During the DEM Configuration part of the New Document wizard, an error message appears, and one or both columns on the wizard display Not Available.

A: Generally, this problem arises if DEM is not configured properly on the server, for example, if the DEM Employee was not configured or was not linked to roles.

Although Infor recommends that you fix this configuration, the user can still use the Worktop document, but cannot use the Baan Process Browser.

Q: When I open Business Processes using an Infor ERP Baan IVc back end, the following error messages appear:





These error messages can appear if the back end is unable to write the Business Process definition onto the back end. These definitions are written into the $BSE\eme directory. If this directory does not exist, you must create this directory. In addition, be sure to provide sufficient permission for the user to be able to write the definitions into this directory on the back end.

Q: I cannot run the Worktop using an Infor ERP Baan IVc back end. Worktop does not continue in the connecting dialog box.

The same problem might occur on the server when you first run BW and then try to create a new, or open an existing document, using the same BWC file. The problem is probably caused by the fact that the oledaemon process is not running on the bshell. For Worktop, this process should be executed automatically when you start BW.

You can specify this in the Maintain BMS Mask Data (ttadv4188m000) session. Start the session and find the mask called oledaemon.

If this mask does not exist yet, create this mask. The corresponding session/object must be (ttstpoledaem) and the ***Automatically Add Mask*** *and* ***Boot*** *options must both be enabled.*

After you create or modify the key, be sure to convert to runtime data dictionary using, for example, the Convert User Data to Runtime Data Dictionary (ttaad4200m000) session, close the Worktop document and any open BW connection to restart the bshell.