



Getting Started with the Lawson Portal

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Portal

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Chapter 1

Lawson Portal Overview

This chapter provides an overview of the Lawson Portal features and how to use the Portal.

What Is the Lawson Portal?

The Lawson Portal is the gateway to everything you need to do your job.

The Portal is the single access point to all the content you use every day. This includes the World Wide Web, your company's intranet, PC applications like word processing and spreadsheets, and, of course, Lawson. There is no limit to where you can go with the Portal.

You access the Lawson Portal through a browser; no desktop client is necessary. The Portal resides inside the browser window, between the Address text box and the status bar at the bottom.

Figure 1. Form Clip: Lawson Portal in the browser window



Portal Terminology and Concepts

The following subsections provide brief introductions to terminology and concepts that you need to know when you work with the Portal.

What is the Lawson Portal home page?

The Lawson Portal home page is the first page that appears when you log in to the Portal. You decide most of the content that appears on the home page. You select the navigation, content, and shortcuts to personalize the home page.

What Is a Bookmark?

A bookmark is a link to a URL (a location) for an Internet web site or search engine; a location on your company's intranet; a file, folder, or application on your PC; a Lawson component, such as an application, menu, or tool. Your system administrator assigns you the Lawson bookmarks you need to do your job.

Typically, bookmarks are arranged in groups. For example, if you work in the Benefits department of your company, you and your department co-workers might be assigned to a group called "Benefits" that would include bookmarks for the programs within the Human Resources suite that you need to do your job. The Benefits group might also contain bookmarks that everyone in your company has access to, or you might be assigned to an additional general group along with everyone in your company.

Your Portal administrator, in cooperation with your manager, determines which bookmarks you have access to. After you receive access to a bookmark, it appears on a list of links that are available for you to use. (If you encounter a problem retrieving information that you believe you should have access to, see your Portal administrator.)

Navigation Items versus Content Items

In the Lawson Portal, navigation and content are important concepts to understand. In simplest terms:

- Navigation is a place you want to go to
Navigation options appear in menus or lists in the left pane.
- Content is information you need
Content appears in the right pane.

In slightly more complex terms, navigation items are top-level bookmarks that, when you click on them, provide a list of links to content items. You can think of navigation and content as having a parent-child relationship. Navigation is the parent; content is the child.

Content pages have no subordinate pages associated with them. No navigation is needed to access a content page. When you click on content that has been added to the content pane, you access the content itself, not a link to the content. You can immediately start working with content that appears in the content pane.

Searching the Lawson Portal

Searching is one way to locate content that you want to work with. Typically, you type words in the Search Text box and press **Enter**. A list of content pertaining to the search words appears. For more information, see "[Navigate and Search the Portal](#)" on page 15.

You can also make use of the Lawson Knowledge Base to search for information about Lawson products. The Knowledge Base is available from the Lawson support web site (<http://support.lawson.com>).

Objects on the Lawson Portal

Most items on the Portal can be thought of as either content or navigation. Navigation items are links that you click to take you somewhere else. Content objects are anything—web sites, Lawson application forms, reports, data, PC applications—that you use to do your job.

Content Pane

On the Lawson Portal, the content pane contains whatever you are currently working on. This could be a report, an application, a Web site, or some other item you need to do your job. The home content pane is the content that appears by default when you log in to the Portal and when you select Home. You use the Page Layout feature to select what content appears in the home content pane.

Navigation Pane

The pane on the left side of the Portal is a menu of the locations that you can go to. You select which items appear in the navigation pane of the Portal home page. Other menus appear depending on the results of searches that you have performed.

Portal Options

There are several options in the Portal that you can access via a link or an icon. Refer to the chart below for detailed information about the Portal options.

Option	Meaning
Help 	Select this option to access support.lawson.com, About, Hotkeys, Portal User Help, and the Portal Admin Help (if you have access to the Portal Admin).
Search Links Menu 	Provides a list of links you can search by. For example, you can search by Lawson Applications, Bookmarks, Lawson Knowledge Base, Yahoo, MSN, or Google.

Option	Meaning
Preferences 	Provides access to the Content page, User Options page (General tab, Drill tab, Shortcuts tab, Hotkeys tab), and Change Password page.
Search Lawson Applications 	Searches the Lawson Applications for the search criteria entered in the Search text box.
Drill Around 	Opens the Drill Around dialog box.
Calendar 	Opens the calendar. This icon appears next to a date field.
Drop-down box 	Allows you to make a selection from the list
[logout]	Logs you out of the Portal
Collapse Left Pane arrow 	Collapses the left pane (where the tabs are located), and the right pane expands in size.
Auto Monitor check box 	If this check box is selected, the Portal automatically checks for new jobs and refreshes the page (with the new jobs added to the list).
Related Forms dropdown box 	Select this option to show a list of related links.

Search Text Box

This is the Search text box that appears on the top right corner of the Portal.



Use this box to perform a search or go to a URL. Following are some examples of searches that you can perform:

- To search for a Lawson form that you don't know the name of, type as much of the name as you know and then click the Search Lawson Applications icon (located next to the Search box) or press **Enter**. A list of search results appears in the Search tab. The Portal scans your bookmarks first and then searches all your Lawson applications to find the location you specify.
- To go directly to an internet site without leaving the Portal, type the URL (for example, www.lawson.com) and then click the Search Lawson Applications icon (next to the Search box) or press **Enter**. You are connected to the site, and the home page for the site appears in the content pane.

For more information, see "[Navigate and Search the Portal](#)" on page 15.

Your Shortcuts and Search Engine Options

NOTE Access to shortcuts and search engine options can be removed or modified by your system administrator, so they might not appear or function in your Portal as described here.

The Portal lets you create shortcuts for links to your own Lawson or non-Lawson content.

You can create shortcuts (items that launch from the navigation pane) and search engine options. For more information, see "[Personalize Your Portal](#)" on page 19.

You can create shortcuts to Internet sites, documents on your PC, or specific Lawson forms that you want to access quickly. After you create shortcuts, they appear on the navigation pane.

You can also create up to five search engine options. After you create these options, they appear on the list of items that you can launch by clicking the arrow (Search Links menu) next to the Search Lawson Applications icon on the Portal home page.

Chapter 2

Navigate and Search the Portal

This chapter explains how to use the Lawson Portal to access application forms.

- ["Logging In to the Lawson Portal" on page 15](#)
- ["Search the Lawson Portal: An Example" on page 16](#)
- ["Performing a Simple Portal Search" on page 17](#)
- ["Ways to Navigate Within Applications" on page 17](#)
- ["Accessing Application Forms" on page 18](#)

Logging In to the Lawson Portal

The following procedure explains a method for logging in to the Lawson Portal. If your system administrator has created a different system at your site, you might not log in as described here.

STEPS To log in to the Lawson Portal

1. From a browser, go to the URL for the Lawson Portal.

See your system administrator for the URL for the Lawson Portal. Typically, the URL is something similar to:

`http://ServerName:Port##lawson/MyPortal`

where *MyPortal* is the name of the directory where Portal files reside.

2. Type your User Name and Password at the Portal login.
3. Click Login.

Search the Lawson Portal: An Example

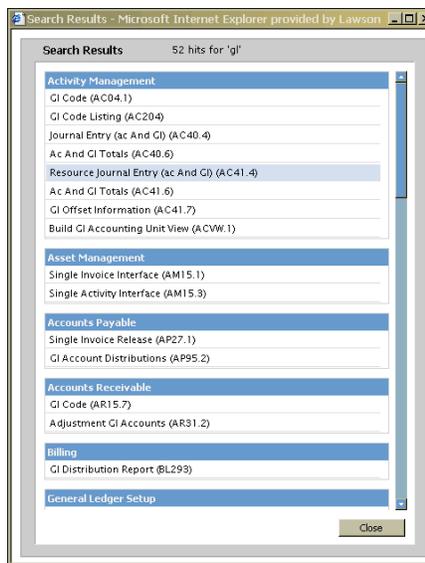
The best way to explain how to search the Lawson Portal and how to understand the search results is with an example.

Example

Suppose you have just logged in to the Portal and are currently on the Home page. You need to work with some content (a report) in the General Ledger application, but you do not remember the name of the form that you want to access. You do remember that the report contains “GL” in the title, so you perform a search for GL according to the following example:

1. You type the word or words that you want to search for in the Search text box, which is in the top right corner of the Portal. In this example, you type **GL**.
2. Click the the Search Lawson Applications icon (located next to the Search text box) or press **Enter**.
3. A list of search results appears. In this example, the results are all navigation items that you have access to that contain the letters “GL.”

Figure 2. Form clip: GL Search results list



4. You scroll the list and determine that “GL Code Listing” is the item that you want.
5. Click GL Code Listing to access the form.
6. The GL Code Listing form appears.

Performing a Simple Portal Search

This procedure explains how to perform a simple search with the Portal to find Lawson navigation and content items. You perform searches every time you use the Portal.

STEPS To perform a simple search

1. Log in to the Portal and place your cursor in the Search text box (located in the top right corner).
2. Type as much information as you know about the search item.
3. Click the Search Lawson Applications icon (located next to the Search text box) or press **Enter**.

A list of topics that meet your search criteria appears on the Search tab.

4. Scroll the list to find the content you want to work with.
5. Click the link to the content.

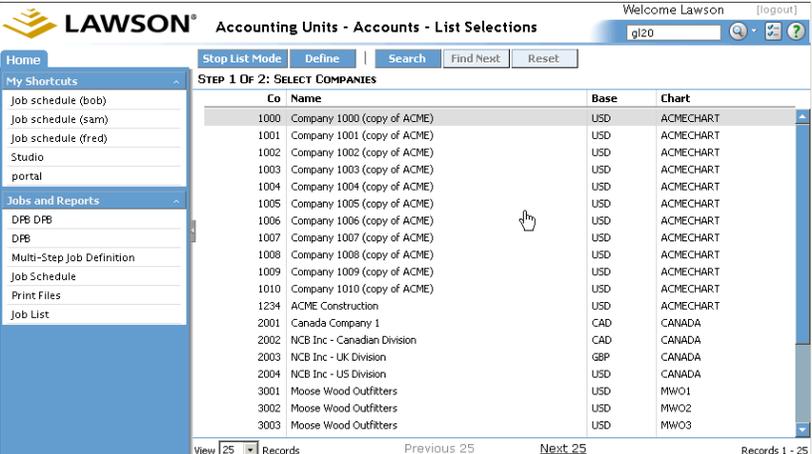
Ways to Navigate Within Applications

There are two main ways to navigate within a Lawson application: list-based or form-based. By default, form-based navigation is used. You can change the method of navigation through User Options. For more information, see "[User Options](#)" on page 26.

List-based Navigation

In the list-based method, records are listed in key order and you select records for a key field from a list. Once you have selected all keys, the form will open. For inquiries, this is often the fastest way to locate data.

Figure 3. Form clip: List-based presentation



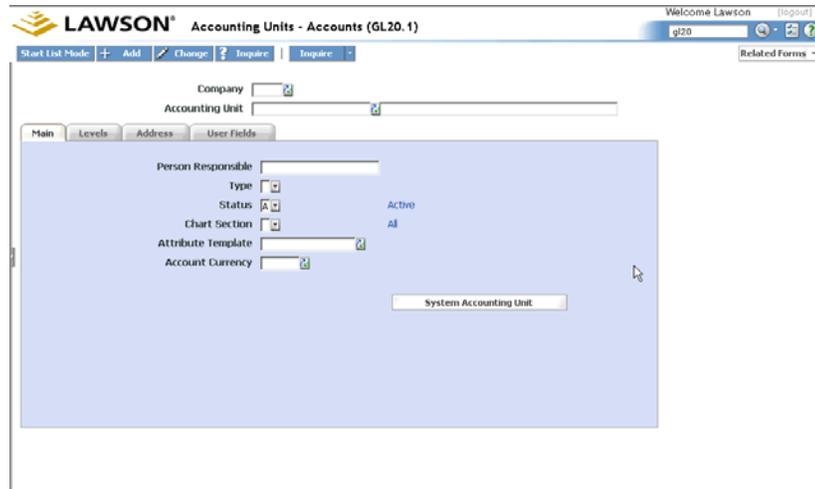
Co	Name	Base	Chart
1000	Company 1000 (copy of ACME)	USD	ACMECHART
1001	Company 1001 (copy of ACME)	USD	ACMECHART
1002	Company 1002 (copy of ACME)	USD	ACMECHART
1003	Company 1003 (copy of ACME)	USD	ACMECHART
1004	Company 1004 (copy of ACME)	USD	ACMECHART
1005	Company 1005 (copy of ACME)	USD	ACMECHART
1006	Company 1006 (copy of ACME)	USD	ACMECHART
1007	Company 1007 (copy of ACME)	USD	ACMECHART
1008	Company 1008 (copy of ACME)	USD	ACMECHART
1009	Company 1009 (copy of ACME)	USD	ACMECHART
1010	Company 1010 (copy of ACME)	USD	ACMECHART
1234	ACME Construction	USD	ACMECHART
2001	Canada Company 1	CAD	CANADA
2002	NCB Inc - Canadian Division	CAD	CANADA
2003	NCB Inc - UK Division	GBP	CANADA
2004	NCB Inc - US Division	USD	CANADA
3001	Moose Wood Outfitters	USD	MWO1
3002	Moose Wood Outfitters	USD	MWO2
3003	Moose Wood Outfitters	USD	MWO3

Form-based Navigation

Form-based navigation means that when you open an application, you will be on a blank form. You then locate the record you want to inquire on by

doing a key field search. Users who do primarily data entry might prefer to use the form-based method.

Figure 4. Form clip: Form-based navigation example



Searching

With either list or form-based navigation, you can always do a search from the Search text box located at the top right corner of the navigation pane. Just type in a key word, for example, the name or partial name of a program you want to run. The system searches your list of bookmarks first and then searches all applications. The more specific you are in your search, the faster the search results will appear.

Accessing Application Forms

This procedure describes several methods for accessing application forms. The method you use might vary depending on what action you have most recently taken and, therefore, what menu is currently active for you.

These instructions assume you are already logged into the Lawson Portal.

To access application forms

- Perform a search.
 - If you know the form name or part of the name, type it in the Search text box and press Enter. You will either go directly to the form (if you have provided enough information to uniquely identify it) or select it from the list that appears on the Search tab.
 - If you know the form ID, type it in the Search text box to go immediately to the form. This method is quick, but you do need to know the form ID.
- From a related page or through a related link (left pane of the Portal).

NOTE All of the following are valid ways to locate a form, depending on your situation:

Chapter 3

Personalize Your Portal

This chapter explains how to customize your Portal to fit your day-to-day working needs.

- ["Portal Home Page Setup Overview" on page 20](#)
- ["Personalize Your Portal Home Page" on page 21](#)
- ["Selecting Navigation and Content Items" on page 22](#)
- ["Arranging Navigation and Content on Your Home Page" on page 23](#)
- ["Changing Content Pane View Options on the Fly" on page 24](#)
- ["Unsubscribing \(or Subscribing\) to Bookmarks" on page 25](#)
- ["User Options" on page 26](#)
- ["Quick Search URLs" on page 31](#)
- ["Setting User Options for Application Forms" on page 31](#)
- ["Setting Up Drill Options" on page 34](#)
- ["Creating a Shortcut" on page 35](#)
- ["Making Changes to the Hotkeys" on page 35](#)

Portal Home Page

Portal Home Page Setup Overview

You decide what content (applications, reports, and so on) appears on the Portal home page and what position the content occupies on the page.

You can change the arrangement of your Portal in terms of what is displayed and how it is displayed. Changing the Portal to meet your needs is called personalizing the Portal. Personalizing the Portal means doing any or all the following tasks:

- Deciding what navigation, content, and shortcuts appear in the Portal home page main
- Changing the order of navigation items
- Arranging content items across one or more columns
- Resizing content items in the content pane while you are viewing them

Personalize Your Portal Home Page

This procedure describes how to set up the Portal home page so that the items you wish to display on the home page appear and are in the desired order.

STEPS To personalize your Portal home page

1. From the Portal toolbar, click Preferences (check marks icon)>Content.

The form appears with lists of your Bookmarks, Navigation, and Main Content.

2. Design your navigation pane.
 - Select navigational items to appear on your navigation (left) pane by double-clicking or dragging and dropping the location to where you want it to display.
 - Change the order of an item by dragging it to the position in the list you want it to occupy.
3. Design your content pane.
 - a. Double-click items that you want to appear in your content window.
 - b. Move items to the location where you want them to appear. By default, each item will appear in a single column.
 - Change the order of an item by dragging it to the position in the list you want it to occupy.
 - To display across two or three columns, move each item to the column where you want it to appear.

4. Return to the Portal home page.

You will be prompted to Save your changes and Reload Portal button.

5. Make additional changes from the home page, if desired. The changes you make can be just for the session or permanent.
 - a. Click Edit Layout.
 - b. Make any of the following changes:
 - Resize an item. Navigate to the edge of the content item. When the double-sided arrow appears, drag the item up/down or left/right.
 - Minimize or maximize an item by clicking the minus (-) or plus (+) symbol in the top right corner of the content window.
 - Remove an item by clicking the red X in the top left corner of the content window.
 - Expand an item by clicking the green box in the top right corner of the content window. The content expands to fill the Portal content pane, and the color of the box in the top right corner changes to red. The content returns to its normal size if you click the red box.
 - Click Save if you want to save the changes or Cancel if you do want to keep the changes after the Portal session.

Navigation and Content

This section contains the following topics that describe how to set up the Lawson Portal to meet your needs.

- ["Selecting Navigation and Content Items" on page 22](#)
- ["Arranging Navigation and Content on Your Home Page" on page 23](#)
- ["Changing Content Pane View Options on the Fly" on page 24](#)
- ["Unsubscribing \(or Subscribing\) to Bookmarks" on page 25](#)

Selecting Navigation and Content Items

You use the Portal Content form to select the Lawson navigation and main content items that you want to view on the home page. (From the Portal home page, select Preferences, Content to get to this page.)

All items that are available for you to add to your navigation or content appear in the Bookmarks list. Items in the Navigation list will appear as menus on the far left portion of your Portal home page. Items in the Main Content list will appear in the Content pane of your Portal home page.

Items identified with a closed or open multi-page book are top-level bookmarks. Top-level bookmarks have subordinate content associated with them. A closed book means you can click to expand and see the subordinate bookmarks. A multi-page open book means the bookmark is already expanded.

An open book (no pages) identifies a subordinate bookmark.

- **Subscribe to a bookmark** — When a check-mark appears in front of any bookmark, it means you are subscribed to it. When you are subscribed to content, it means you can place this content on your home page through a menu or on your main content pane. Even if you do not place subscribed content in your home page, it is available to you when you perform a search.
- **Unsubscribe to a bookmark** — You can click on the bookmark to unsubscribe to it. The most common reason for unsubscribing to a bookmark is to remove subordinate bookmarks that appear automatically under a top-level bookmark on your home page navigation pane. If you need only some of the subordinate bookmarks, you can remove those you do not need.

Arranging Navigation and Content on Your Home Page

From the Content form (available from the Portal home page when you select Preferences (check marks icon)>Content) you can:

- Move a top-level bookmark to your home page navigation pane by double-clicking or dragging it. When a navigation item is in the Navigation list, you can rearrange the order of navigation items by dragging them to the appropriate place in a list.
- Move a content item to the Main Content list by double-clicking or dragging. When a content item is in the Main Content list, you can drag it to the appropriate spot. Content items can span up to three columns in the Portal home page content pane. For example, if you want Content B to appear next to Content A in Portal home page content pane, drag Content A to the same line as Content B. The column will automatically resize to accommodate Content A and Content B.

Changing Content Pane View Options on the Fly

You might want to temporarily change your Portal viewing options. For example, if your content pane is set up to display several content items, the windows they appear in will be fairly small. Suppose you want to read a long report in the content pane. You can minimize the need for scrolling by clicking the Expand button for the report content. The Expand button causes the content to fill up the entire content window. When you are finished reading the report, you can click the Normal button to return the content to its regular position.

You can change the following view options for the Portal home page when you use the Portal:

- Resize content items, that is, make the space the content occupies larger or smaller
- Maximize, minimize, or remove content items
- Expand an item to fill the content pane

If you choose to save on-the-fly changes you make to the content pane, they will become permanent (until you decide to change them again). If you don't save them, they will be in effect only during the current Portal session.

To	Do this
Resize an item	Click the Edit Layout button, and then navigate to the edge of the content item. When the double-sided arrow appears, drag the item up/down or left/right.
Minimize or maximize an item	Click the minus (-) or plus (+) symbol in the top right corner of the main content window. When the item is minimized, only the title bar appears on the content pane.
Remove an item	Click the red X in the top left corner of the main content window.
Expand an item	Click the green box in the top right corner of the content window. The content expands to fill the Portal content pane, and the color of the box in the top right corner changes to red. The content returns to its normal size if you click the red box.

Unsubscribing (or Subscribing) to Bookmarks

This procedure explains how to unsubscribe/subscribe to bookmarks.

The most common reason for performing this procedure would be to remove subordinate bookmarks, that is, bookmarks that appear automatically under a top level bookmark. Removing subordinate bookmarks can free space on your navigation pane.

You could also use the procedure to subscribe to bookmarks, if you have been given access to the bookmark by your system administrator. If the bookmark appears in your list, you have access to it. (See your system administrator if you need access to a bookmark that does not appear in your Bookmarks list.)

STEPS To unsubscribe (or subscribe) to bookmarks

1. From the Portal home page, select Preferences (check marks icon)>Content.
2. Click on closed books to expand them, if necessary.
3. Bookmarks you are subscribed to have check marks in front of them. Click to remove the check mark.

– or –

If the check mark is removed and you want to add it, click on the box.

Unchecked bookmarks will not appear in your navigation pane or content window.

User Options

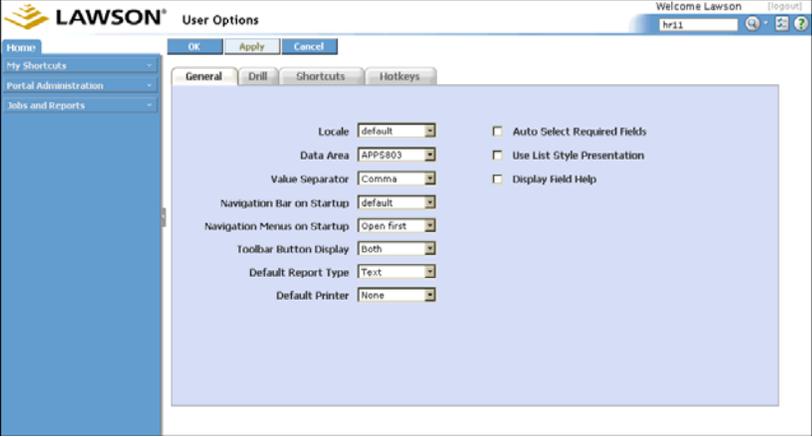
User Options

The User Options feature contains four tabs: General, Drill, Shortcuts, and Hotkeys. These tabs are available when you click Preferences (check marks icon)>User Options.

General

The General tab lets you change options for Locale, Data Area, Default Printer, Default Report Type, and other features. For more information, see ["Setting User Options for Application Forms"](#) on page 31.

Figure 5. Form clip: General



The screenshot shows the 'User Options' dialog box with the 'General' tab selected. The dialog has a title bar with 'LAWSON' and 'User Options' and a 'Welcome Lawson' message. The left sidebar contains navigation options: Home, My Shortcuts, Portal Administration, and Jobs and Reports. The main area contains the following settings:

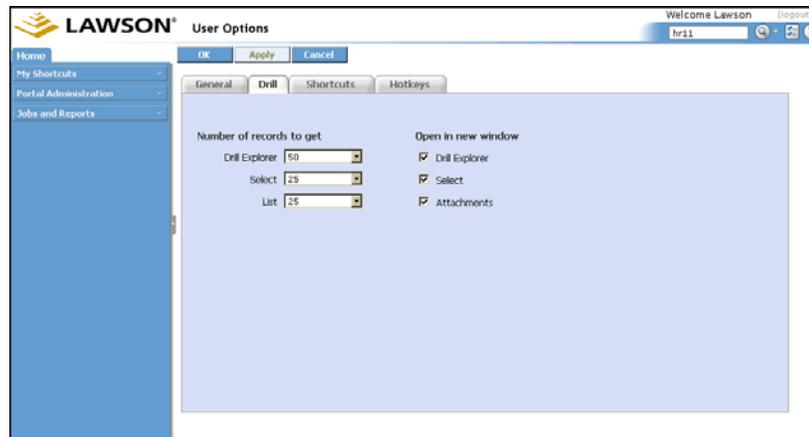
Setting	Value	Option
Locale	default	<input type="checkbox"/> Auto Select Required Fields
Data Area	APP5803	<input type="checkbox"/> Use List Style Presentation
Value Separator	Comma	<input type="checkbox"/> Display Field Help
Navigation Bar on Startup	default	
Navigation Menus on Startup	Open first	
Toolbar Button Display	Both	
Default Report Type	Text	
Default Printer	None	

Drill

The Drill Around feature lets you view information without having to transfer to the form or forms where that information is maintained.

The User Options Drill tab allows you to specify the number of records to display at one time. You can also specify if you want Drill Explorer to open in a new window.

Figure 6. Form clip: Drill



Shortcuts

Shortcuts are links that you create to locations that you need to access. They can be locations on the web, a location on your company's intranet, a Microsoft Word document you use frequently, a spreadsheet, or virtually any other kind of file.

When you create shortcuts, you can access them from the navigation pane of the Portal.

You might also want to use shortcuts to save you from having to exit the Portal to use word processing or another PC application. You can set up shortcuts that are links to files on your PC.

One big advantage of shortcuts is that the file that tells the system where to look for the shortcut resides on the server, not on your PC. This means that no matter where you log in to the system, you will be able to use your shortcuts (as long as the computer where the file that the shortcut points to is available).

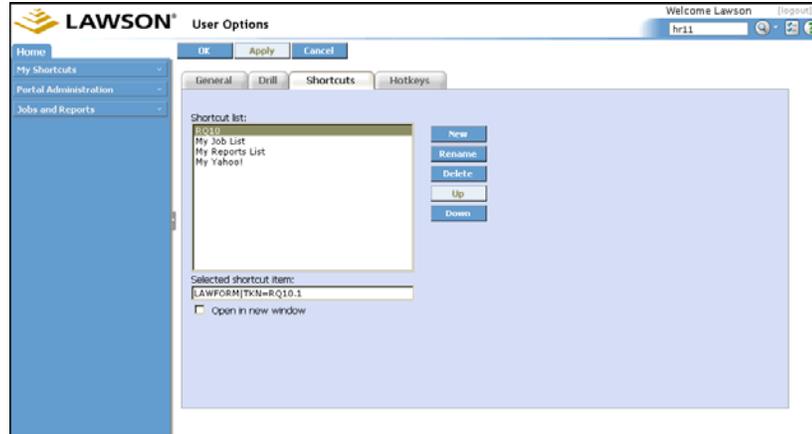
For example, if you work from home sometimes and have some files on a server, even if they are not Lawson files, you can access them when you access the Lawson system. The same is true if you don't always use the same computer at work. When you are logged in to the Lawson Portal, your shortcuts are available from any computer.

You might want to use shortcuts to run simple scripts that activate Lawson application forms. There are many different uses that can be made of shortcuts. You can create up to 20 shortcuts.

Use the Shortcuts tab to create shortcuts. There are several simple uses for shortcuts:

- to access a URL on the World Wide Web
- to access My Documents on your PC (My Documents opens in the content pane and you can select the documents you want to work with.)
- to access a document on your PC
- to access a Lawson form

Figure 7. Form clip: Manage Shortcuts



Select the following link for information on how to create simple shortcuts. For more information, see ["Creating a Shortcut"](#) on page 35. Your system administrator can provide you with information for creating more complex shortcuts.

Hotkeys

Hotkeys let you perform a specific operation quickly with keystrokes rather than through menu selections. For example, if you are working with a form and you want to delete all data from the form, instead of clicking in each field and deleting the data for each individually, you can press **Ctrl+Shift+K** (press all three keys at the same time) to clear all fields to the end of the form.

Hotkeys are shortcut key combinations for performing specific actions in the Portal, on forms, or in reports. You can customize your own hotkeys, if the Portal administrator has allowed you to do so through the role file.

Lawson delivers three sets of hotkeys, which are active when you access the component with which they are associated.

- Portal hotkeys are shortcuts for navigating and other purposes within the Portal.
- ERP application hotkeys are shortcuts for Lawson form actions.
- ERP report hotkeys are a small set of shortcuts to be used with Lawson reports.

Select the following link for a complete list of hotkeys available from the Portal when you work with Lawson applications. For more information, see ["Lawson Portal Hotkeys"](#) on page 91.

How to Access Hotkeys

When you work with a Lawson product that has a defined set of hotkeys (the Portal itself, ERP applications, and ERP reports), the action associated with the hotkey activates when you press the key combination.

You can view the available hotkeys from the Help menu (top right corner of the Portal) which has an option for Hotkeys help. Hotkey help is dynamically updated when the user (or Portal administrator) makes changes.

Customizing Hotkeys

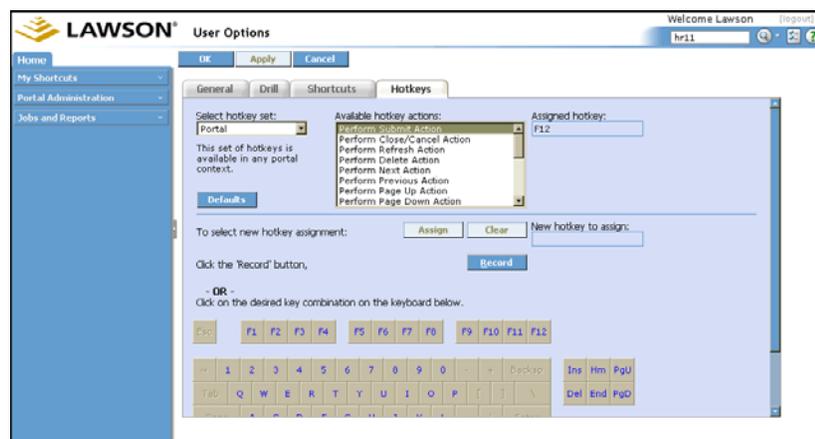
Unless the Portal administrator has disabled this feature, you can customize the hotkeys. User hotkey assignments override those set by the role and are in place permanently (or until changed again), not just for a specific Portal session.

Changing Hotkey Assignments

IMPORTANT The interface for changing hotkeys is the same for end-users as it is for Portal administrators. If you are allowed to change hotkeys, the Hotkeys tab will appear when you select User Options. If the Portal administrator has restricted your access to change hotkeys, this tab will not appear as part of the User Options menu.

The Portal provides an interface to step you through the process of changing a key assignment. The interface provides lists of the actions that are available for hotkey assignments and lets you click on keys you want to assign. The interface also prevents you from making a duplicate assignment.

Figure 8. Form clip: Portal interface for assigning hotkeys



To make an assignment, you select the hotkey set and then the action that you want to assign from the list of available actions. Then you click the key that you want to assign to this action. Only one regular key can be used, but you can use multiple modifier keys. Click OK when you are finished making assignments.

Modifier keys (Ctrl, Shift, and Alt)

The keys Ctrl, Shift, and Alt are modifier keys. It is a good idea to use them in conjunction with another key to make a unique key combination. You must use modifier keys to make assignments with letter keys or with Enter or Tab. Function keys and action keys (like Backspace, Insert, and so on) can be assigned without modifiers.

Alt is a key that is frequently used in shortcuts in browsers and other software that might be running simultaneously with Lawson. To avoid conflicting with third-party products, it is a good idea to use Alt in combination with another modifier key, for example, Alt+Shift+F6.

NOTE The modifier keys can be used in any combination but in the Edit box, they will always appear before regular keys. The order that you press the keys does not matter.

Enter, and Tab keys

Because the Enter and Tab keys have many uses in operating systems, browsers, and other software outside of Lawson, take care when assigning them to make sure that you don't conflict with other programs.

Ensuring unique assignment of hotkeys

Hotkeys cannot be duplicated, including among the hotkey sets. As you click the hotkey combinations that you want to assign, you will receive feedback from the Portal. If the message "Currently assigned to: None" appears, it means the hotkey has not been assigned to any other action, so your new assignment will occur when you click the Assign button. (The Assign button can only be clicked if the key combination you want to assign is not already assigned.)

If the "Currently assigned to" message contains the name of an action (and the Assign button is not available), it means the hotkey has already been assigned to the specified action. If you want to use the key combination, you must first unassign the current action.

For example, the form action "Clear Entire Form" is, by default, assigned to Ctrl+Shift+X in the ERP applications hotkey set. Suppose you wanted to assign F12 to that action. By default, F12 is assigned to Perform Submit Action in the Portal hotkeys. Before you could make this change, you would first have to reassign Perform Submit Action to a different key.

Quick Search URLs

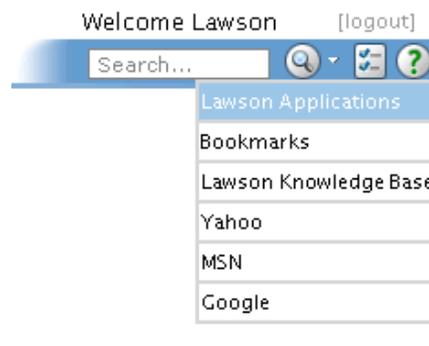
NOTE Because your system administrator can customize options available from the Search text box, your Portal might have different options than described here.

When you click on the Search Lawson Applications icon (located on the right side of the Search text box), you can immediately launch one of the search engines and other resources. Lawson has predefined options for Bookmarks, the Lawson Knowledge Base, and popular Internet search engines, including Yahoo, MSN, and Google.

When you type a word in the Search text box and then click on the arrow, your search will launch in the search engine you select. For example, if you select Bookmarks, the search will include Lawson bookmarks. If you select Knowledge Base, your search will launch in the Lawson Knowledge Base. If you select Google, your search will launch in Google.

The Search engine you select remains as the search engine until another search option is selected. For example, if you select Google, it will remain as the search engine until you make another selection. In addition, once you select Google, the icon changes to the Google icon.

Figure 9. Form clip: Search selections



You can add up to five additional options (favorites) to the list of URLs that will launch when you right-click the arrow to the right of the Search Lawson Applications icon.

Setting User Options for Application Forms

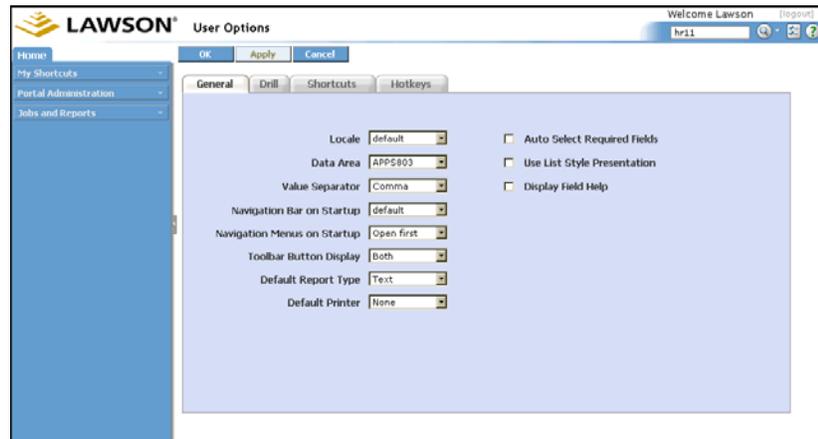
This procedure explains how you can change the settings for some Portal options that affect how applications display on your computer.

STEPS To set user options for application forms

1. From the Portal home page, select Preferences (check marks icon)>User Options.

The User Options General tab appears.

Figure 10. Form clip: User Options



2. Make selections for the following.

Option	Meaning
Locale	<p>The language that the Portal uses. Default is U.S. English.</p> <p>When you change Locale, you must do a Refresh in order for the change to take effect.</p>
Data Area	<p>The data area is a defined storage place within a Lawson Product line. A product line can have one or more data areas. Multiple data areas allow you to separate access to different sets of data within the product line. If you have more than one and are not sure which product line to select, consult your system administrator.</p> <p>When you change Data Area, you must do a Refresh in order for the change to take effect.</p>
Value Separator	<p>This is the value that will be used as the value separator in the CSV file. The options are comma, tab, or semicolon.</p>
Navigation Bar on Startup	<p>Choose how the Navigation bar should display when the Portal is opened. Select default, hide, or restore. If default is selected, the navigation bar will display when the Portal is opened. If Hide is selected, the navigation bar will not display when the Portal is opened. If Restore is selected, the navigation bar will be restored to the same width as the last Portal session.</p>

Option	Meaning
Navigation Menus on Startup	Choose how the Navigation menu should display when the Portal is opened. Select Open first, Open all, or Restore. If Open first is selected, the first menu is the only menu that will display on startup. If Open all is selected, all of the menus will display on startup. If Restore is selected, it will remember the open state of the previous session.
Toolbar Button Display	Use this option to select how the toolbar buttons should display. Select text, icons, or both.
Default Report Type	Select the default report format for Lawson system reports. Choices are PDF or text.
Default Printer	This is the default printer for Lawson system reports, that is, the location the system will use if you do not select a location when you run the report. The printer names and locations available to select from were created by your system administrator. The selected printer name appears to the right of the drop-down list.
Auto Select Required Fields	If this option is selected, required fields will prompt you with available data when you process a record.
Use List Style Presentation	<p>List style presentation means that when you open an application, records (data) appear in a list format, so that you can quickly choose the record you want to work with or perform a search.</p> <p>The list presentation is the fastest way to find a record and is the default for the Portal. Most users will find list style to be convenient.</p> <p>If list style is not selected, an application opens onto a blank record. You would need to perform a key field search to bring up a record. Users whose jobs involve adding new records frequently might want to use this method. If you prefer to have applications open to a blank form all the time, de-select Use List Style Presentation.</p>
Display Field Help	If this option is selected, field help always appears at the bottom of the form without having to click help on the toolbar or pressing CTRL+Shift+H. The Display Field Help feature can be helpful for new users who are not familiar with applications.

3. When you are finished making selections, select Apply and click OK.
4. If you have made changes to the Data Area or Locale fields you will receive the message, "You must reload main menu for [Data Area or Locale] change to take effect." Click the browser's Refresh button to meet this requirement.

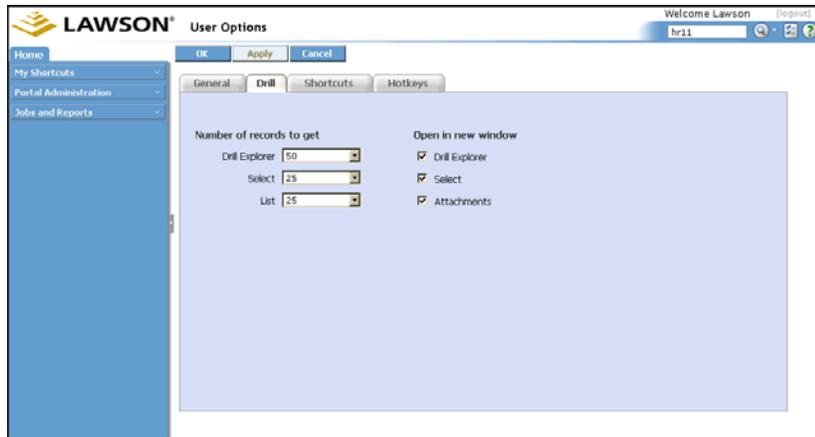
Setting Up Drill Options

This procedure explains how to specify the number of records to display at one time and specify if you want to open Drill Explorer in a new window.

STEPS To set up drill options

1. Select Preferences (check marks icon)>User Options.
2. Select the Drill tab.

Figure 11. Form clip: Drill



3. Make selections for the following.

Option	Meaning
Number of Records to get	This option lets you specify how many records you want to appear at one time. You can set the number of records to display for Drill Explorer, Select and List.
Open in new window	This options lets you specify if you want to open Drill Explorer, Select, and Attachments in a new window.

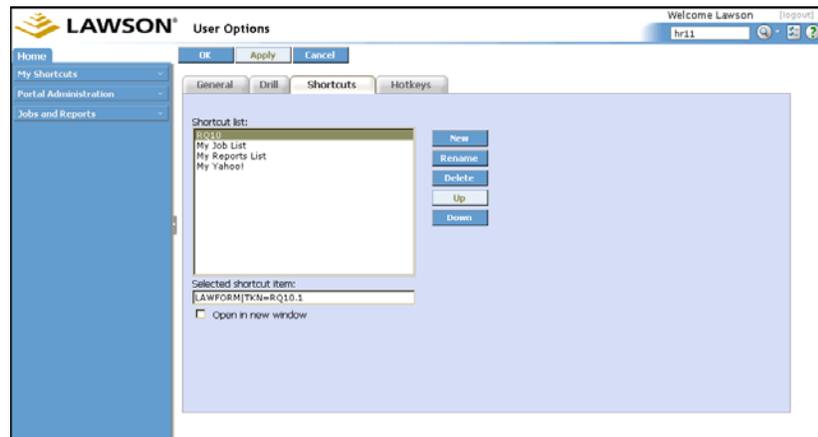
Creating a Shortcut

This procedure explains how to create a simple shortcut. Shortcuts are locations, often outside of Lawson applications, that you want to access from within the Lawson Portal. The file that contains these locations resides on the server, not your PC, so the locations are available whenever you use a computer that has access to the locations.

STEPS To create a shortcut

1. Select Preferences (check marks icon)>User Options.
2. Select the Shortcuts tab.

Figure 12. Form clip: Manage Shortcuts



3. Select the New button.
4. Type a description of your shortcut in the Please enter new shortcut item text field and click OK.
5. Type the location of the file that the shortcut should access in the Please enter new shortcut item URL field and click OK.
6. If you want the shortcut to open a new browser window, select Open in new window.
7. The shortcut appears on the Shortcuts tab immediately after selecting OK.

STEPS To rename a shortcut

1. Select Preferences (check marks icon)>User Options.
2. Select the Shortcuts tab.
3. Select the shortcut you want to rename.
4. Select the Rename button.
5. Type a description of your shortcut in the Please enter new text shortcut item text field and click OK.

Making Changes to the Hotkeys

This procedure describes how to make changes to the Lawson-delivered hotkeys for the Portal, ERP applications, and ERP reports.

There are two different ways you can assign hotkeys.

- Use the keyboard provided on the Hotkeys tab. You can click on the desired key combination. If you want to change the combination you just selected, select the Clear button.
- Select the Record button. If you select the Record button, you must type the new key combination. If you want to change the combination you just typed, you must press Esc before selecting the Clear button.

STEPS Assigning Hotkeys

1. From User Options, select the Hotkeys tab.
2. Verify that you are working with the correct hotkey set (Portal, ERP applications, or ERP reports).
3. To assign a new key assignment, perform one of the following:
 - a. Use the keyboard and click the key you want to assign.
 - b. To assign a key with modifier key(s), click the modifier key (for example, Shift) and then click the regular key (X).

In this example, Shift+X will appear in the New hotkey to assign box.

— or —

- a. Click the record button.
- b. Select the modifier key (for example, Shift) and type the key (X) you want to assign.
- c. When you are finished recording the new hotkey, press Esc.

In this example, Shift+X will appear in the New hotkey to assign box.

NOTE You can assign any key except Tab or Enter; Tab and Enter must be used in conjunction with a modifier key (Alt, Ctrl, or Shift). You can assign the modifier keys individually or in combination without assigning any other key, but you might want to reserve Alt, Ctrl, and Shift as modifier keys.

4. If the Assign button is available (and None appears in the New hotkey existing binding box), it means the key combination is available to be assigned. Click Assign.
5. If the Assign button is dimmed, the hotkey combination is not available for assignment. Check the “Currently assigned to” message. This should tell you what action has been assigned to this hotkey combination. If you want to continue with the assignment, you will have to unassign the key from its existing binding before you can proceed.
6. Click Apply when you have finished making assignments.

STEPS Reverting to Lawson-delivered defaults for all hotkeys

NOTE You cannot revert to the Lawson-delivered default for a single hotkey. The defaults are listed in this document, so you can look up the default for a specific key if you need to.

1. From the Hotkeys tab, make sure you are working with the correct hotkey set and then click the Defaults button.
2. Click OK.

STEPS **Unassigning a hotkey**

1. From the Hotkeys tab, make sure you are working with the correct hotkey set.
2. Select the action for which you want to unassign the hotkey.
3. Click Clear.
4. Click OK when you are finished making changes.

Chapter 4

Process and Manage Jobs and Reports

This chapter focuses on processing and managing batch jobs and reports.

- ["What Is a Batch Job?" on page 40](#)
- ["What Is the Job Queue?" on page 40](#)
- ["Running a Job Now" on page 40](#)
- ["Running a Job at a Specific Date and Time" on page 42](#)
- ["What Are Job Parameters?" on page 43](#)
- ["Checking the Job Queue" on page 44](#)
- ["Managing Jobs and Reports" on page 44](#)
- ["Accessing the Report" on page 46](#)
- ["Working With Print Files" on page 47](#)
- ["What Is a Multiple-Step Job?" on page 50](#)
- ["Running a Multiple-Step Job" on page 51](#)
- ["What Is the Drill Around for Reports Feature?" on page 52](#)
- ["Using the Drill Around Feature on Report Data" on page 53](#)
- ["Deleting Jobs" on page 53](#)
- ["Printing a Report" on page 54](#)
- ["Saving a Report" on page 57](#)
- ["Recovering a Job" on page 57](#)

Batch Jobs

What Is a Batch Job?

A batch job is a specific unit of work that is performed in the background. Two types of Lawson programs use batch jobs:

- Batch updates
- Reports

These programs differ from those used by online application forms in that with online forms the data gets processed immediately. Batch jobs wait in a job queue for processing when the system has the available resources.

Reports differ from batch updates in that their purpose is to retrieve data from the database, whereas the purpose of batch updates is to make changes to the data in the database. Sometimes reports are available with batch updates—for example, to show what was updated.

What Is the Job Queue?

A job queue is a list of the batch jobs waiting for processing or currently processing. When you submit a batch job (report or batch update) for processing, indicate which job queue it should be processed on.

The system monitors the job queue and updates the list of jobs on the Jobs Schedule, so that you can check which jobs are waiting to be processed and which have been completed.

Running a Job Now

Use these procedures to define a job and submit the job to a job queue.

To define a job, you use a batch parameter form, such as Employee Listing (HR211) or Payroll Close (PR197). All batch parameter forms have a set of job definition fields where you provide a unique name and description for the job, and many batch parameter forms have parameter fields as well. The job parameters define the information you want in the report or the data you want processed in a batch update. For example, you might want to define that a report includes a specific company's data or that a batch update processes a specific company's data.

When you submit a job, you indicate which job queue it should be processed on. The job queue is a list of the batch jobs waiting for processing or currently processing. The system monitors the job queue and updates the list of jobs on the Jobs Schedule, so that you can check which jobs are waiting to be processed and which have been completed. The Jobs Schedule will also

indicate if the job did not complete normally, in which case you begin the troubleshooting process or contact your system administrator for reports.

STEPS To define a job

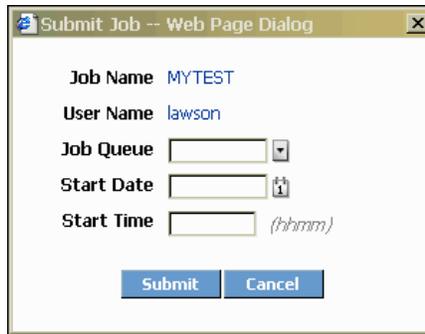
1. Access the batch parameter form for the batch update or report program that you want to run.
2. Enter values in the Job Name and Job Description fields.
3. Define the job parameters by entering values in the parameters fields.
4. Click Add. (If you receive a message saying the job already exists, click Change instead of Add, or change the job name to one that does not already exist and then click Add.)

NOTE For information about specific job parameters, see the appropriate application user guide.

STEPS To submit a job

1. Access the batch parameter form of the batch update or report program that you want to submit a job for.
2. After you have defined a job for that program or have performed an inquire on an existing job, select Submit from the Job Actions dropdown menu.

Figure 13. Form clip: Submit Job dialog box



3. Select a job queue on the Submit Job form if you want the job to run on a different queue than the default queue, or leave the Job Queue field blank if you want to use the default queue.
4. Optional. Enter a date and time in the Start Date and Start Time fields in order to schedule the job for a specific date and time.
5. On the Submit Job dialog box, click Submit.

The following message appears: "Job has been submitted." You can then access the forms that let you view the status of jobs and to print reports.

Running a Job at a Specific Date and Time

STEPS To run a job at a specific date and time

1. Define the batch job.
 - a. Access the job parameter form of the report or batch update you want.
 - b. Enter values in the Job Name and Job Description fields.
2. Define the job parameters by entering values in the parameter fields.
3. Click Add. (If you receive a message saying the job already exists, click Change instead of Add, or change the job name to one that does not already exist and then click Add.)
4. Set up the print information.
 - a. Click Reports from the parameter form.
The Report Properties dialog box appears.
 - b. Type or select values for the following fields:

File	The file for the report you want to print.
Path	The location to save the .prt file.
Destination	The type of print destination: group, printer, or none.
Copies	The number of copies you want to print.
Save	Whether you want to save the .prt file in the location listed in the Path field.

- c. On the Report Properties dialog box, click OK.
 - d. Click Change on the parameter form to update the job record.
5. Click Submit from the parameter form. The Submit Job dialog box appears.
6. Select a job queue on the Job Submit form if you want the job to run on a different queue than the default queue, or leave the Job Queue field blank if you want to use the default queue.
7. Type start date and start time.
8. On the Submit Job form, click Submit.

The following message appears in the status bar: "Job has been submitted." You can then access the forms that let you view the status of jobs and print reports.

Job Parameters

What Are Job Parameters?

To run a report or a batch update, you must identify the batch job (assign it a name and description) and define the job parameters. After you submit a job, you can access it later to do such things as check the status, view report data, and delete print files.

The job parameters define the information you want in the report or the data you want processed in a batch update. For example, you might want to define that a report includes a specific company's data or that a batch update processes a specific company's data. You define parameters on the parameter form for the report or batch update.

This chapter assumes that you will be defining your job parameters from an application form. You can also use the Job Definition utility to do this, but Job Definition is only required for multiple-step jobs. For more information, see ["What Is a Multiple-Step Job?"](#) on page 50.

Figure 14. Form clip: Sample parameter form

The screenshot shows the Lawson Payroll Distribution Listing (PR223) parameter form. The form is titled "LAWSON® Payroll Distribution Listing (PR223)" and includes a navigation bar with buttons for Add, Change, Delete, Previous, Inquire, Next, and Inquire. The form contains several fields and buttons:

- Buttons: Submit, Reports, Job Sched, Print Mgr
- Job Name: [Text Field]
- Job Description: [Text Field]
- User Name: janson (dropdown menu)
- Data Area/ID: APPS810 (dropdown menu)
- Parameters section (indicated by a horizontal line):
 - Company: [Dropdown Menu]
 - Report Selection: [Dropdown Menu]
 - Process Level: [Dropdown Menu]
 - Distribution Process Level: [Dropdown Menu]
 - Distribution Department: [Dropdown Menu]
 - Employee Sequence: [Dropdown Menu]

Managing Jobs and Reports

Checking the Job Queue

You must check the job queue to find out if your job has completed. If a report job has completed, you can then view or print the report. You do this through the Job Schedule form. The Job Schedule form also indicates which jobs have not completed successfully so that you can investigate the reason for the failure.

STEPS To check the job queue

1. On the parameter form for a batch update or report, click Job Schedule from the Jobs and Reports menu. The Job Schedule form appears.
2. Click Active Jobs, Completed Jobs, or Waiting Jobs to control which jobs appear in the list, based on their status. If you click Waiting, the list includes jobs with the following statuses: Waiting on Recovery, Needs Recovery, and Invalid Parameters.

Managing Jobs and Reports

Lawson provides tools for managing your jobs and reports, including Reports, Jobs Schedule, and Multi-Step Job Definition. With these tools you can submit a job, check your job status on the job queue, view a job, print it, and work with print files.

This section describes options available from the Job Schedule form and the Job List form. Select the following link for information about working with print files. For more information, see "[Working With Print Files](#)" on page 47. Select the following link for information about the job definition. For more information, see "[Running a Multiple-Step Job](#)" on page 51.

Job Schedule Form

The Job Schedule provides useful information about the report/batch updates, including job name, job description, job queue, start and stop date/time, and status. You can choose to view jobs based on whether their status falls into the Active, Completed, or Waiting category. You access Jobs Schedule by clicking Job Schedule on the Jobs and Reports menu of the Job List and Print Files forms.

By default, the Job Schedule form lists jobs by date. The most recent job appears first.

You can use Job Schedule to delete jobs, recover Needs Recovery jobs, and view the job log for each job.

In addition to its job scheduling functions, Job Schedule also provides access to the Job List, Multi-Step Job Definition, and Print Files through the Jobs and Reports menu.

NOTE You do not have the option to sort columns.

You can also select the Search button to open the Search dialog box. Use this feature to find and filter the jobs. Use the Find feature to display the first occurrences. Click Find to perform the search. Select the filter option to display all occurrences of the search criteria. Click Filter to filter the search criteria.

Figure 15. Form clip: Find and Filter options

Search -- Web Page Dialog

Perform: Find Filter

Select Find to display the first occurrence of the search criteria or Filter to display all occurrences of the search criteria.

Find Field: Job Name = Find Value: []

Find Cancel

Figure 16. Form clip: Job Schedule form

LAWSON Job Schedule - Completed Jobs for lawson

User Name: lawson

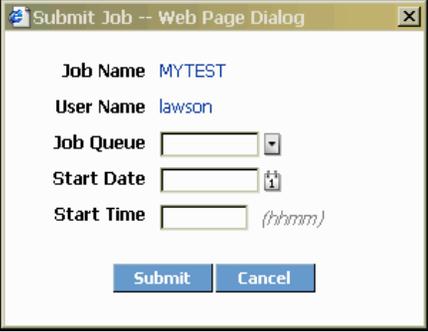
Job Name	Parameters	Job Queue	Start Date	Stop Date	Status
RW100	RW100	*****	05/11/2005 11:36:35	05/11/2005 11:36:38	Normal Completion
RW100	RW100	*****	05/11/2005 11:34:46	05/11/2005 11:34:51	Normal Completion
MULTTEST	CU201	*****	04/29/2005 04:19:07	04/29/2005 04:19:11	Normal Completion
810J08	CU201	*****	04/28/2005 11:34:13	04/28/2005 11:34:16	Normal Completion
REQREPORT	RQ111	*****	04/27/2005 11:26:00	04/27/2005 11:26:02	Normal Completion
810J08	CU201	*****	04/27/2005 11:25:35	04/27/2005 11:25:38	Normal Completion
810J08	CU201	*****	04/21/2005 09:22:56	04/21/2005 09:23:00	Normal Completion
CU210	CU210	*****	04/19/2005 11:31:28	04/19/2005 11:31:31	Normal Completion
GL245	GL245	*****	04/18/2005 01:06:19	04/18/2005 01:06:21	Normal Completion
ICS20CL	ICS20	*****	04/15/2005 02:25:45	04/15/2005 02:25:48	Normal Completion
XYZ	CU201	*****	04/15/2005 10:40:04	04/15/2005 10:40:07	Normal Completion
CU201	CU201	*****	04/14/2005 02:24:33	04/14/2005 02:24:34	Normal Completion
810J08	CU201	*****	04/14/2005 02:09:50	04/14/2005 02:10:00	Normal Completion
810J08	CU201	*****	04/14/2005 02:08:41	04/14/2005 02:08:43	Normal Completion
REQREPORT	RQ111	*****	04/14/2005 02:08:00	04/14/2005 02:08:10	Normal Completion
810J08	CU201	*****	04/14/2005 02:08:02	04/14/2005 02:08:03	Normal Completion
SINGLEJOB	CU201	*****	04/14/2005 02:07:54	04/14/2005 02:07:55	Normal Completion
MULTTEST	CU201	*****	04/14/2005 02:07:50	04/14/2005 02:07:54	Normal Completion
ICS20CL	ICS20	*****	04/14/2005 02:07:45	04/14/2005 02:07:48	Normal Completion
CU201	CU201	*****	04/14/2005 02:05:08	04/14/2005 02:05:10	Normal Completion

Submit Job Form

The Submit Job form lets you select the job queue for a batch update or report and set a start date and time for the processing of the batch update or report.

The Submit Job form appears when you click Submit Job on any of the following locations: Job Schedule, Job List, and Multi-Step Job Definition form.

Figure 17. Form clip: Job Submit dialog box



The screenshot shows a web page dialog box titled "Submit Job -- Web Page Dialog". It contains the following fields and controls:

- Job Name: MYTEST
- User Name: lawson
- Job Queue: A dropdown menu.
- Start Date: A text field with a calendar icon.
- Start Time: A text field with a clock icon and the placeholder "(hh:mm)".
- Buttons: "Submit" and "Cancel" buttons at the bottom.

Job List Form

The Job List form lists all available jobs, both batch updates and reports, for a particular user. From the Job List form, you can perform such actions as delete a job definition, view parameters, view the print file, or submit a job.

You can access the Job List form in several ways, depending on what content you are currently working with. You can access it by clicking Job Sched on a batch parameter form and by clicking Job List on the Jobs and Reports menu for the Job Schedule and Print Files form.

Accessing the Report

STEPS To access the report

STOP After you run the job for a report, perform the steps below to access the report. Following is one way to do this.

1. Access Job Schedule if you want to see if the job is completed.
2. Click Print Mgr on a batch parameter form, or by clicking Print Files from the Related Forms menu.
3. Navigate to your job on the list and then select view to view the selected report.

The report will display in text format by default.

If you want to view the report in PDF format, click the desired format in PDF, respectively.

If you select Text, the Portal displays the report in the current window. If you click PDF, Adobe Acrobat® Reader™ displays the report. After you view the report in PDF, click text to return to the original view.

Working With Print Files

Once your report has run and a print file exists, several options are available for working with the print file. You can access these options from the Print Files link.

The Print Files link lets you manage your print files that are produced by report and batch update programs. From the Print Files form, you can select and then view or print a print file. You can rearrange the list of files in ways that make sense to you and delete files that you no longer need.

For each print file, the form lists the job owner, job name, job description, form ID (token) of the report or batch update parameter form, name of the file produced by the report or batch update program, and the date and time the program produced the file.

You can view the output of your report on screen or send a report to a printer. You can also view or print the output in different formats (PDF or text), or export the print file to a CSV file.

Send a Report to a Printer

Use the Print Report dialog box to set up the printing information for a report. When the Lawson system processes the report, it uses the printing information to know which printer to send the report to.

You access the Print Report dialog box by clicking the Print button from Print Files.

Figure 18. Form clip: Job Print dialog box



The screenshot shows a web-based dialog box titled "Print Report -- Web Page Dialog". It contains the following information:

- Job Owner: lawson
- Job Name: MYTEST
- Form: CU201
- Print File: CU201.prt
- Printer: nw1030 (selected from a dropdown menu, with "NW 1030" displayed next to it)
- Copies: 1

At the bottom of the dialog, there are two buttons: "Print" and "Cancel".

Changing the Print File Format

By default your report will generate output in Text format. You can view (and print) the report in Adobe's PDF format. You can also export the print file to a CSV formatted file.

When you click Print Files from the Related Forms drop-down list, you will bring up a form that allows you to choose options for the print file.

NOTE The print file default view format is customizable.

Figure 19. Form clip: Print files

Job Owner	Job Name	Description	Parameters	File Name	Created
lawson	MULTITEST	Currency Codes Listing	CU201	CU201.prt	04/29/2005 04:19:10
lawson	MULTITEST	Currency Relationship Listing	CU202	CU202.prt	04/29/2005 04:19:09
lawson	810306	Currency Codes Listing	CU201	cu201.prt	04/28/2005 11:34:14
lawson	REQREPORT	reas report	RQ111	rq111.prt	04/27/2005 11:26:01
lawson	CU210		CU210	CU210.prt	04/19/2005 11:31:30
jeffc	D		CU201	cu201.prt	04/19/2005 10:28:12
albab	MRK		CU201	cu201.prt	04/19/2005 10:27:32
lawson	GL245		GL245	gl245.prt	04/18/2005 01:06:20
lawson	ICS20CL	Testing - Ltd	ICS20	ICS20.prt	04/15/2005 02:25:47
lawson	XYZ		CU201	cu201.prt	04/15/2005 10:48:06
lawson	CU201	defined from a batch token	CU201	CU201.prt	04/14/2005 02:24:33
lawson	SINGLEJOB	Currency Codes Listing	CU201	CU201.prt	04/14/2005 02:07:54
lawson	HHRHFOOS	Level Reorganization	AC120	AC120.prt	04/14/2005 02:04:33
lawson	CU201CAL		CU201	cu201.prt	04/06/2005 06:08:45
lawson			PO20.1	p-form1	04/06/2005 03:07:21
lawson	123		GL165	gl165.prt	03/23/2005 04:49:13
lawson	123		BFR.1	errors1	03/23/2005 04:49:12
			PO20.1	p-fax-copy1	12/09/2004 03:26:50
lawson	ICS20AI	Handheld Item Master Interface	ICS20	ICS20.prt	12/09/2004 11:19:08
lawson	INSTALL	install bookmarks	LO920	lo920.prt	10/19/2004 03:17:57

When you click the View button from the Report Actions menu, the report itself appears in the content pane with options for changing the display in View Options. In the form clip below, the report is displaying in text format.

Figure 20. Form clip: Print files

CU202 Date: 04/29/05
Time: 16:19

JOB SUBMISSION PARAMETERS

User Name: lawson
Job Name : MULTITEST
Step Nbr : 1

Currency Table:

From Currency:
To Currency:
Report Option:
Effective Date: -

CU202 Date 04/29/05
Time 16:19

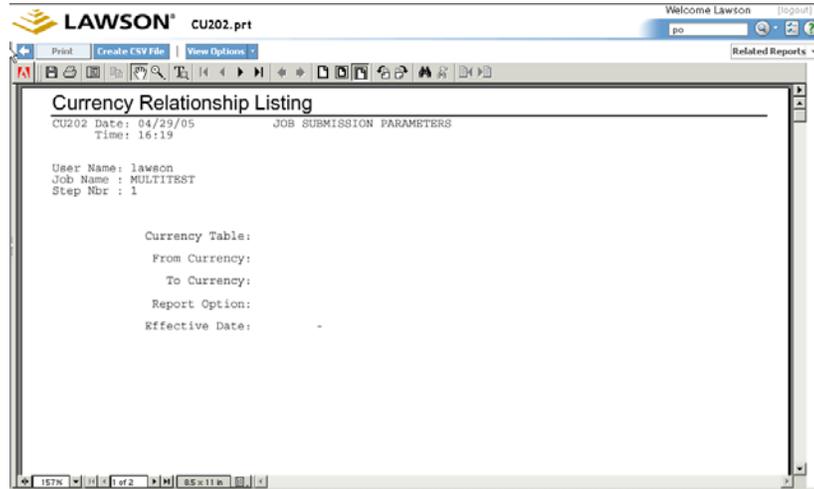
Currency Relationship Listing

Currency Tbl	From Crncy	To Crncy	Multiply Divide	Triang	Via	Override	Exchange	Translation	Translation	Las
						Protect Tolerance	Status	Status	Rates	

The screen clip that follows shows the same report but this time in PDF format. When you choose to view a report in PDF format, Adobe Acrobat opens in the content pane and displays the report in Acrobat. You can make

use of all the features (including printing, searching, and so on) that are available from Acrobat.

Figure 21. Form clip: Print file in PDF format



See Another User's Print Files

The Print Files form shows all available print files for a user. If you have access to the jobs of other users, you can see the print files of those users. Select the user's name from the User Name drop-down list.

What Is a Multiple-Step Job?

A multiple-step job is a run of batch programs (or steps) organized under a single run request.

Multiple-step jobs save you time and effort. They are especially useful for daily or weekly tasks that require you to distribute data to many users.

When you run a multiple-step job, each step in the job is submitted and run in order. If there is a problem with an early step, subsequent steps that might depend on data in the failed step are not run.

Multiple-step jobs let you group similar functions. For example, suppose you have a set of reports that are dependent on each other (that is, you don't want Report B to run unless Report A is successful). These are resource-heavy reports and, in order to make the most effective of your system, you want to run them in the evening when no users are on the system—but also when no system administrators are available to check on the job.

Here's an example:

- Step 1 of your job is an Employee Listing for ABC Company
- Step 2 is a Chart of Accounts for Company DEF
- Step 3 is an open invoice listing for Company XYZ.

Step 2 will not run unless step 1 is successful and so on.

The fact that system administrators are not on site to check the job status is not a problem in this situation. The job will not finish if a step is not successful.

Job Definition Form

The Multi-Step Job Definition form is for defining jobs of all kinds. However, users who run ordinary (single-step) jobs are not required to use the Lawson Multi-Step Job Definition utility to perform their jobs. This is because reports and simple update jobs can be run directly from the parameter screen. When you run multiple-step jobs, you must use Job Definition. The utility is simple to use, and the form is similar to parameter screens and Job Schedule forms you will use when running single-step jobs.

When you set up a multiple-step job, you must know the alpha-numeric form ID. See your *Lawson Administration Guide* or your system administrator if you are not sure of the form IDs of the forms you are running.

Each step in a multiple-step job requires a description (the form ID is the default) and must have a specified data area. Parameters are only active for a step when you have done an inquire or add for the form and the job has been accepted.

A step can run the same program as a preceding step by using different batch parameters.

You can have virtually as many steps as you want in a multiple-step job. (There is a maximum number, but it is more than 32,000—more steps than would be practical for a job.)

Running a Multiple-Step Job

This procedure explains how to run a multiple-step job. Multiple-step jobs are special jobs that are actually a set of related jobs that are grouped together.

STEPS To define and run a multiple-step job

1. Access the Multi-Step Job Definition form. You can access this form through the Multi-Step Job Definition link from the Jobs and Reports menu on the Job Schedule, Print Files, and Job List forms.
2. Provide a job name and description for the job. The name cannot include spaces or special characters.
3. Complete the information for each step in your job.

- a. Select a data area.
- b. Type or select the alphanumeric form ID of the batch update or report program you want to run for this step.
- c. Type a description of the step if you do not want the default (which is the form title for the form ID you selected).

The description can be any combination of letters or numbers and can include spaces.

- d. Click Add to add the new job.

You should receive a message that the job has been added. If you have not supplied step descriptions, the system will use the form title as the description.

If you receive a message saying the job already exists, click Change instead of Add, or change the job name to one that does not already exist and then click Add.

- e. Click Parameters to type parameters for the step.
- f. Click Insert Step to add your next step.
4. When you are finished adding steps, click Change.

Each step in the multiple-step job will be processed as if it were a regular, single-step job.

Use the Job Schedule form to track progress of the job. The Job Queue will show a status of Completed when all steps have completed normally.

NOTE You can change the batch parameters of a step that has been submitted but has not yet executed. When the step is executed, it runs with the new batch parameters.

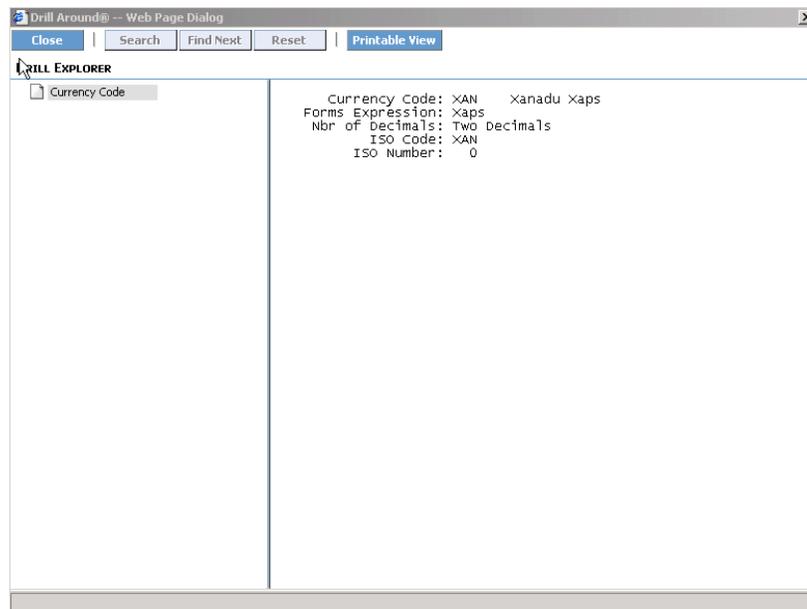
What Is the Drill Around for Reports Feature?

The Drill Around for Reports feature is the ability to view additional detail about values or items that appear in a report. For reports that have been set up to allow Drill Around activities, many values or items in the report appear as links. That is, based on the settings of your browser, the values or items have a different appearance, such as underlining or text in a different color. When you click these links, forms appear in which you can drill further to find the information you need.

You can view Drill Around data by looking at the text view of a report.

When you click on a drill around link within the report, you will bring up a box of drill around data.

Figure 22. Form clip: Drill Around for Reports



Using the Drill Around Feature on Report Data

You can use the Drill Around feature on report data if you view the report in text mode.

STOP This procedure is only appropriate for reports set up to allow the Drill Around feature.

STEPS To view the Drill Around data from within a report

1. Access the print file of the report for which you want to view Drill Around data. For more information, see ["Accessing the Report"](#) on page 46.
2. Click any link to see the Drill Around data associated with that link. (Depending on your browser settings, links are usually a different color than other text and are underlined.)

The Drill Around for Reports form appears.

3. Click on the links for which you want to view the Drill Around data.

Deleting Jobs

In order to eliminate unused, unneeded, or obsolete jobs and reports, you may need to perform some cleanup of the jobs and reports you are responsible for. Your system administrator may perform other cleanup operations as well. For users whose access is controlled by Lawson Security, what cleanup the users are allowed to do depends on the security setup. For users whose access is controlled by LAUA security, an individual user can delete the following items, if that user created the items:

- Job definitions. For more information, see ["To delete a job definition \(multiple-step or single-step\)"](#) on page 53.

You can delete job definitions through the Job List form or through the individual batch parameter forms. You must delete job definitions for a batch update or report if the parameter form for the batch update or report changes (for example, the order of the parameters is changed). In that case, you must create the job definitions again using the new parameter form.

- Jobs. For more information, see ["To delete a job from the Job Schedule list"](#) on page 54.

You delete jobs through the Job Schedule form. If the job has not yet been processed, it is also removed from the job queue.

- Print files. For more information, see ["To delete print files"](#) on page 54.

You delete print files through the Print Manager form.

STEPS To delete a job definition (multiple-step or single-step)

1. In the Portal, access the Job List form.

2. For any job definition that you want to delete, right-click on the row and click Delete, or select Delete from the Job Actions dropdown menu.

To select multiple job definitions for deletion, click the check box for each job definition to be deleted and then click Delete from the Job Actions menu.

3. To confirm that you want to delete the job(s), click Yes.
4. Click OK.

STEPS To delete a job from the Job Schedule list

1. In the Portal, access the Job Schedule form.
2. Right-click on the job name you want to delete and select Delete, or select the job and click Delete from the Job Actions dropdown menu.

To select multiple jobs for deletion, click the check box for each job to be deleted and then click Delete from the Job Actions dropdown menu.

3. To confirm that you want to delete the job(s), click Yes.
4. Click OK.

STEPS To delete print files

1. In the Portal, access the Print Manager form.
2. For any print file that you want to delete, right-click on the row and click Delete, or select the print file and click Delete from the Report Actions menu.

To select multiple print files for deletion, click the check box for each print file to be deleted and then click Delete from the Report Actions menu.

3. To confirm that you want to delete the print file(s), click Yes.
4. Click OK.

Printing a Report

You can print reports from two types of forms:

- Batch parameter form
- Print File form

You can use the Report Properties dialog box to set up report printing data for a report job and save it. Then, when you submit and process the report job, the system executes any printing instructions set up on the Report Properties dialog box (number of copies, printer to print the report on, and so on).

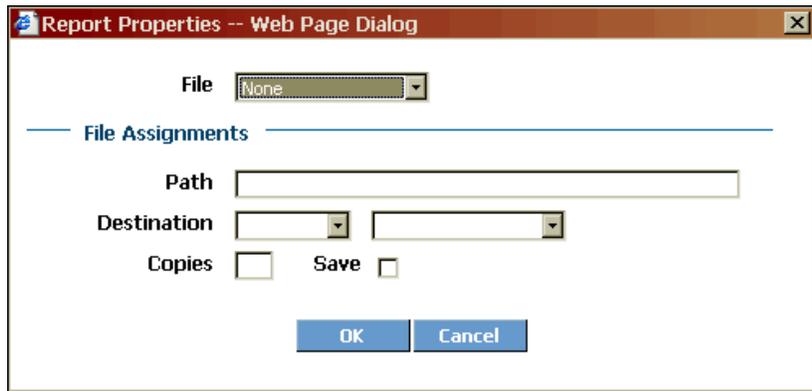
STOP You can print only the reports that you or someone else has defined and submitted, and that the system has finished processing.

STEPS To print reports from a parameter form

1. Access the parameter form for the report and inquire on or add the job definition for the report.
2. Click Reports.

The Report Properties dialog box appears.

Figure 23. Form clip: Report Properties



3. Type or select values for the following fields:

File	The file for the report you want to print.
Path	The location to save the .prt file. The default print file path is LAWDIR/print/username/jobname/step#/formID.prt You can override the default print file name by manually assigning a new print file name and location. When you run the associated batch job, the system creates the print file and assigns it the new name and location. The new name and location is applied only to the print file associated with the active batch job; it is not permanently applied to the print file or its history. For example, if you rename the print file for the EMPLIST job (using HR211), then add a new job called EMPADDR (using HR211), the print file still uses the default format unless you rename it.
Destination	The type of print destination: group, printer, or none.
Copies	The number of copies you want to print.
Save	Whether you want to save the .prt file in the location listed in the Path field.

4. On the Report Properties form, click OK.
5. Click Change on the parameter form to update the job record.
6. Click Submit to send the report to the printer.

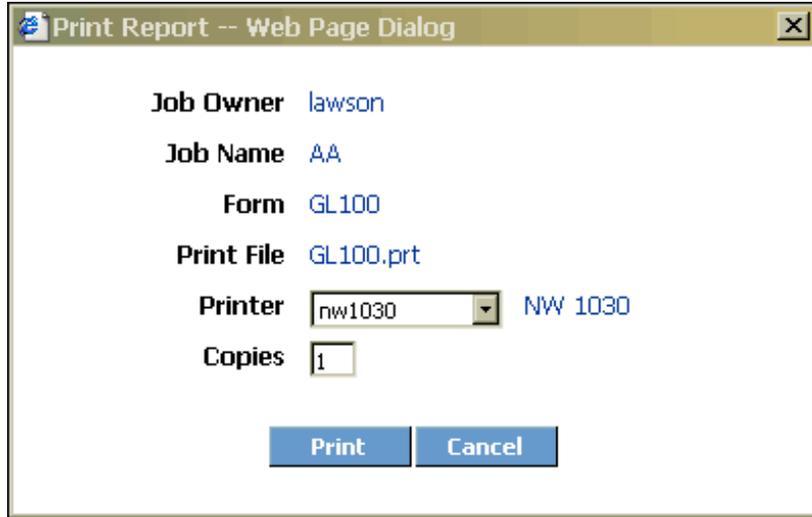
If the report processes successfully, the system also executes the printing instructions set up on the Report Properties dialog box.

STEPS To print reports from the Print Manager form

1. In the Portal, access the Print Manager form and select the report you want to print.
2. Click Print from the Report Actions dropdown menu.

The Print Report dialog box appears.

Figure 24. Form clip: Print Report



3. In the Printer field, select a printer.
4. In the Copies field, type the number of copies you want to print.
5. Click Print.

Saving a Report

You can save reports as .prt files and CSV files.

The .prt file (or print file) is the format most reports are in when first processed. It can be useful to save the print file to a location that is different from the default location that the print file is stored in. Then, if you resubmit the report, the original print file is not overwritten.

CSV files are comma-separated value files. This means that the data in the file is delimited or separated by commas or other delimiters. It can be useful to save reports in this format because CSV files can be opened by spreadsheet applications.

STEPS To save a report as a CSV file

1. After running the job for a report, click Print Files.
2. Select the report you want to save.

The report will display in text format.

3. Click Create CSV File.

A File Download dialog box appears.

4. Name and save the CSV file. You can now open it in a spreadsheet application.

Recovering a Job

You can recover a waiting job with a status of Needs Recovery. A job with a Needs Recovery status is one that failed during the execution or processing of the job.

IMPORTANT Before you try to recover the job, you must correct the problem with the job. In addition, you cannot recover a job with a status of Waiting on Recovery until you recover the job with a Needs Recovery status that uses the same program.

When you recover a job, the system uses restart information (as appropriate) to continue processing from the point where the initial execution failed.

STEPS To recover a job

1. In the Portal, access the Job Schedule form.
2. Click the Waiting Jobs tab.

After you click the Waiting Jobs tab, the Job Schedule form lists only jobs with a status of Waiting on Recovery, Needs Recovery, or Invalid Parameters.

3. Select the job you want to recover by selecting the checkbox for it.
4. Click Recover from the Job Actions dropdown menu.
5. Click Yes to confirm that you want to begin the job recovery.

Chapter 5

Lawson Applications Overview

This chapter contains general information about Lawson applications. For specific information about how to use an application, see the documentation for that application.

- ["What Is an Application?" on page 59](#)
- ["Lawson Application Terminology and Concepts" on page 59](#)
- ["Application Forms" on page 61](#)
- ["Kinds of Application Forms" on page 61](#)
- ["Other Form Features" on page 65](#)

What Is an Application?

An application is a set of related programs and data files that performs a group of related business tasks. Each application is uniquely identified by a two-letter system code. For example, the code for the General Ledger application is GL; the code for the Human Resources application is HR.

Lawson Application Terminology and Concepts

The following subsections provide brief introductions to terminology and concepts that you need to know when you work with Lawson applications.

What Is a Record?

A record is a set of related data from a database file. For example, if you have a database file for employee information, a record from that file would contain the information for one employee: the employee's name, address, status, and so on.

Each type of data in a database file—such as employee number, last name, or status—is a field. Each record is one set of values for the different fields.

For example, in the sample database file below, LastName and Status are two of the six fields for that database file.

Figure 25. Illustration: Database record

Company	Employee	LastName	FirstName	MiddleIn	Status
4321	1	Albrit	Tina	K	Married
4321	2	Brown	Dan	B	Single
4321	3	Thompson	Brian	F	Single
4321	4	Lindstrom	Donna	K	Single
4321	5	Simmons	Laura	J	Married
4321	6	Erikson	Paul	T	Married
4321	7	Lewis	Shane	A	Married
4321	8	Halls	Steve	G	Single

What Is a Key Field?

A key field is a field on an application form for which a value is required before you can access any data associated with that application form. It is a “key” field because it is a “key” to unlocking your access to the data.

If you use list-based form access, you must select values for each key field before you access a form. The key field appears in a list before you open the form. Once the form is open, the key field is at the top of most application forms. (If you use form-based access, the key field is usually selected at the top of the form.) For more information, see ["Ways to Navigate Within Applications"](#) on page 17.

For example, Employee Deduction has a Company, an Employee, and a Deduction field at the top. If you type or select values for these fields and then perform an Inquire form action, you will see any specific data associated with that deduction for that employee for that company.

What Is a Product Line?

NOTE See your Portal administrator if you need to know which product line to use.

A product line is a group of programs and their data. It is subdivided into suites such as Financials and Human Resources. These are further subdivided into applications. Applications consist of programs and database tables or files. For example, if you use the Human Resources suite and the General Ledger application, your product line would hold all the applications and database tables in the Human Resources suite, as well as the General Ledger application and tables.

You may also have multiple product lines, depending on your business needs. For example, you may have one product line for testing and another product line with the same applications that is used for production. A product line generally has a unique name that identifies the version of the applications it contains.

Your Lawson administrator sets up each user with a default product line. If you need to access other product lines, you can select the appropriate one (if you have access to it) when you are using the application.

Application Forms

An application form is a window used to accomplish a specific business task. You use application forms to enter, change, and review data. Each application form has a title, for example, Employee Deduction.

Each program within an application has one or more associated application forms you can use to access or update data. An application program can be one of two types: an online program that runs in real time, or a batch program that runs in the background.

An application form contains several standard parts.

Related Pages

Some Lawson forms are multiple-pages. The Related Pages box gives you immediate access to other pages on the form.

Related Links

The Related Links box lists other menus that relate to the content you are currently using. (In previous versions of Lawson, this feature was called “Local Form Transfer.”)

Action Buttons

Action buttons activate processing available from this form. They are: Add, Change, Delete, Inquire, and so on. Each link or button represents a form action.

Kinds of Application Forms

Lawson applications use a variety of forms. The differences depend on the kind of data a particular form views and updates. Some, but not all, forms, let you add or change data. Some forms have key fields and detail areas. If a form has a key field or detail area, you access it differently than forms that do not have them.

Single-Record Form

A single-record form presents to the user a set of fields that represent one record from a database file. A single-record form will have at least one key field. In order to inquire on data for this type of form, you must provide values for the key fields.

For example, the form, Company, (), has a single key field, Company. If you enter the number of an existing company in this field and then perform

record from one database file and a detail area that contains multiple records from another database file.

The header area contains the key fields for the form and may contain other fields as well. The detail area has multiple lines of data, with each detail line representing a record. A special relationship exists between the detail area and the header area: all records displayed in the detail area share the information displayed in the header area of the form.

Figure 28. Form clip: Header/detail form

The screenshot shows a Lawson HR form titled "Official Languages Bilingual Requirements (PA96.1)". The header area includes fields for "Company", "Employee", "Position", and "Bilingual Employee" (with a "Not Applicable" option). Below the header is a table with the following columns: "FC", "Effective", "End", "Report Type", "Description", "Office or Region", and "Description". The table contains multiple rows of data, each with a small icon in the "FC" column. The form also features navigation buttons like "Change", "Previous", "Inquire", "Next", and "Inquire" at the top, and a "Related Forms" dropdown menu.

Inquiry Form

An inquiry form is much like a header/detail form with the addition of fields for filtering the records that you want to look up. These fields appear either on the form itself in the header area or on a subform that you access through a Filter button.

You cannot use an inquiry form to add or update records. However, you can use an inquiry form to view records or to find a record that you want to work with. For example, you can select a record in the detail area and then transfer to another form. The data associated with the record you selected is transferred so that you can immediately begin to edit the record in the form you transferred to.

For example, you could select a detail record for an employee on *Action Inquiry* and then transfer to *Pers Action History Correction* to make changes to that employee's record. On *Action Inquiry* you could enter values in the

Company, Action, and History Errors key fields, and then also enter values in the filter fields: Effective through Employee Group.

Figure 29. Form clip: Sample Inquiry form

The screenshot shows the Lawson Action Inquiry (PA66.2) form. The form has a header with the Lawson logo and the title "Action Inquiry (PA66.2)". Below the header is a navigation bar with buttons for "Previous", "Inquire", "Next", and "Inquire". The main area contains several fields: "Company", "Action", "History Errors", "Effective", "Process Level", "Department", "User Level", "Location", "Supervisor", and "Employee Group". There is also an "Exclude Errors" checkbox. Below the fields is a table with the following columns: "SC", "Employee Name", "Pos Level", "Effective Date", and "Comments". The table is currently empty.

Subform

A subform is an application form that you can access only by clicking a button on another application form and that is subordinate to the other form. Subforms contain additional fields when there are too many fields to fit on a single form. They are especially useful for containing fields that you only occasionally need to access. If you do not need to work with the fields on a subform, you simply do not click the button for the subform.

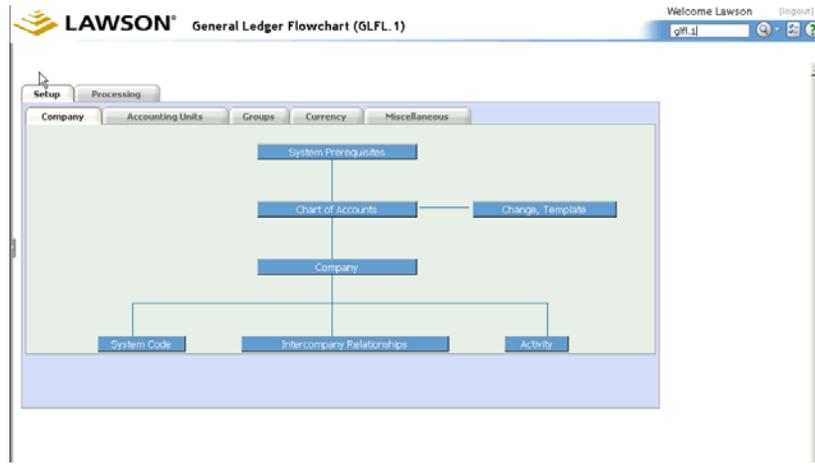
Subforms look the same as other application forms except that they usually contain additional actions just below the action bar, typically OK and Cancel. If you click these, you return to the form that you accessed the subform from.

Flowchart or Setup Form

Flowchart and setup forms are special forms that display a set of buttons that represent related forms. The purpose of the flowchart or setup form is to

provide the user with an easy way to access the application forms needed to perform a process—such as a setup process.

Figure 30. Form clip: Sample flowchart form



Other Form Features

This section describes objects that appear on the Portal when you work with Lawson applications.

Attachments: Comments and URLs

A comment is external information that you can attach to a record.

Comment Attachments

The comments feature lets you add comments to comment types that have been predefined for the application form you are using. Within each comment type, you can have up to 50 individual comments. Each comment type is a category that contains a set of comments that are similar in content or purpose. Each predefined comment type contains unique information in the header area of the comment form. You can use the Description field in the lower half of the comment form to add notes or other information that lets you add more definitive meaning to data in the field.

URL Attachments

A URL can also be attached to a record.

The Universal Resource Locator (URL) feature lets you attach e-mail and Internet URLs to a record and access them from an associated field. For example, you might want to store URLs for individual vendors and access the URLs from the Vendor field. This would be useful for initiating electronic communications if you find it necessary to communicate with a vendor using e-mail or if you want to access another vendor's World Wide Web site.

Option	Description
Back	Returns to the previous view (if the previous view is one that lists lookup methods).
Previous	Displays the previous set of records.
Next	Displays the next set of records.
Customize	Opens a Customize form where you can select additional fields to display in the Select form.
Find	Opens a Find form where you can enter criteria for finding a specific value.
Refresh	Refreshes the list of values.

Portal Help

The Lawson Portal offers different types of help depending on where you are in the Portal and your access rights.

Portal User Help — Portal User help is available from the toolbar. When you click Help (question mark icon), you can choose Portal User Help. Use the Lawson Portal User Help to discover important information about the Lawson Portal. The Lawson Portal User Help includes several procedures to help you perform specific tasks within the Portal.

Portal Admin Help — Portal Admin help is available if you have admin access rights. Portal Administrator help is available from the toolbar. When you click Help (question mark icon), you can choose Portal Admin Help. Search the topics in Lawson Portal Administrator Help to locate quick information about adding web users, maintaining bookmarks and other tasks that you perform through the Lawson Portal Administration bookmarks.

Portal Form Help — Lawson application help is available from the toolbar when a form is in the content pane. If no form is active, Help will give access only to the About box. When you choose help for the form, a dialog box containing the help text appears. You can scroll the help text to find the topic that you are looking for.

Portal Field Help — When you click Help (question mark icon), you can choose Field Help (to view help for the field you are currently working in) or choose help for the form. For example, on the Journal Entry form, if you click Help, an option for Journal Entry Help appears. To view field help, first place your cursor in the field that you want help for. Click Help and then click Field Help. Field help appears along the bottom of the content pane.

You can choose to have field help appear automatically, that is, without your having to choose Help from the toolbar. For more information, see "[User Options](#)" on page 26.

Hotkeys

Hotkeys are shortcut key combinations for performing specific actions in the Portal, on forms, or in reports. You can customize your own hotkeys, if the Portal administrator has allowed them to do so through the user's role file.

Lawson delivers three sets of hotkeys, which are active when a user accesses the component with which they are associated.

- Portal hotkeys are shortcuts for navigating and other purposes within the Portal.
- ERP application hotkeys are shortcuts for Lawson form actions.
- ERP report hotkeys are a small set of shortcuts to be used with Lawson reports.

Select the following link for detailed information about hotkeys. For more information, see "[User Options](#)" on page 26.

Select the following link for a complete list of hotkeys available from the Portal when you work with Lawson applications. For more information, see "[Lawson Portal Hotkeys](#)" on page 91.

Chapter 6

Update Applications

This chapter focuses on the methods of updating application data.

STOP Before you add and update records, you must know how to access an application form and look up application data, and you must know how to work with single-record, detail, and header/detail forms.

- ["Select Key Field Values" on page 69](#)
- ["Selecting Values for Key Fields" on page 70](#)
- ["Working with Application Data" on page 70](#)
- ["Define a Record in Lawson Applications" on page 74](#)
- ["Selecting Values for Key Fields" on page 75](#)
- ["Looking Up a Specific Record on an Application Form" on page 76](#)
- ["Browsing Through Records on Application Forms" on page 76](#)
- ["Viewing Data Through the Drill Around Feature" on page 78](#)
- ["Performing a Search Using the Drill Around Data" on page 79](#)
- ["Adding a Record" on page 79](#)
- ["Defining a Record" on page 80](#)
- ["Changing a Record" on page 80](#)
- ["Deleting a Record" on page 81](#)
- ["Adding, Changing, and Deleting Detail Lines" on page 82](#)
- ["Adding a Comment Attachment" on page 83](#)
- ["Adding a URL Attachment" on page 83](#)

Select Key Field Values

When you look up data on application forms, you often need to select values for key fields. If you know the exact value for the key field, you can simply type the value. When you do not know the exact value, you can select the value from a list. If a Select form appears on the form, you can view additional detail about the available values so that you can be sure that you select the correct one.

When you use the list-based method to navigate through Lawson applications, the key field is often the first thing you select. If you use the form-based method to navigate, you need to type a key field on the form in order to locate a record.

For more information, see ["Selecting Values for Key Fields" on page 75](#).

Selecting Values for Key Fields

This procedure explains how to select values for a key field. There are two methods for doing this depending on whether you use list-based or form-based navigations.

STEPS To select a value for a key field (list-based method)

1. Select the application form you want to work with from the navigation pane. (If it is not already in the navigation pane, perform a search.)
2. From the list of key fields that appears, select the field you want to work with. You can do this by:
 - Scrolling the list by using the Next and Previous links.
 - Performing a search. Type the criteria in the Search dialog box and click Find.

STEPS To select a value for a key field (form-based method)

NOTE If you use the form-based, rather than list-based method of viewing records, follow this procedure.

1. Click in the key field.
2. Click the select indicator or right-click on the field and then click Select.
Depending on the type of field, a drop-down list, a calendar, or the Select form appears.
3. Select a value:
 - From a drop-down list, click on the value you want. The value appears in the key field.
 - From a calendar, click the date you want. If you need a date from a different month than the current month, click the arrows to the left and right of the month name and then click the date you want. If you need a date from a different year than the current year, click the arrows to the left and right of the year and then click the date you want. The date appears in the key field.
 - From the Select form, double-click folders until you see the value you want. Click that value. The value appears in the key field.

Working with Application Data

The subsections that follow contain information about ways to select and update application data.

Select Tools

A select tool is an icon that appears to the right of some fields, usually as a small button with a triangle on it. Its presence means that you can select values for the field rather than only typing values directly.

Figure 31. Illustration: Select Indicator

The screenshot shows a form with several fields, each with a select indicator (a small triangle icon) to its right:

- Birthdate: [text input] [select indicator]
- Birth State, Province: [checkbox]
- Maiden Name: [text input]
- Former Name: [text input]
- Marital Status: [dropdown menu]
- Gender: [checkbox]
- Birth City: [text input]
- Birth Country: [text input] [select indicator]

Various kinds of tools for selecting data appear on Lawson forms, depending on the kind of data you need to select. Typical tools are:

- Drop-down list
- Calendar
- Select dialog box
- Drill

When you click the select indicator, a drop-down list appears if the field is one that lets you select from a limited set of valid values—for example, yes/no, male/female, or hourly/salaried.

Figure 32. Illustration: Drop-down list

The screenshot shows a form with the following fields and a drop-down list:

- Forms Expression: [text input]
- Number of Decimals: [dropdown menu] (value: 2)
- ISO Code: [dropdown menu] (options: No Decimals, Two Decimals)
- ISO Number: [text input]

Calendar and Date Fields

Calendar fields are sometimes used for date fields. When they occur, you can click the select indicator to bring up a calendar. The current date is highlighted.

Figure 33. Illustration: Calendar

The screenshot shows a calendar for the month of May 2006. The current date, May 10, is highlighted with a yellow box.

<		MAY			>		<		2006		>	
Sun	Mon	Tue	Wed	Thu	Fri	Sat						
	1	2	3	4	5	6						
7	8	9	10	11	12	13						
14	15	16	17	18	19	20						
21	22	23	24	25	26	27						
28	29	30	31									

If you or your administrator has enabled this capability, you can type just six digits of a date and additional digits for year and any required formatting will be automatically provided. For example, you could type "062706" and the result would automatically be "06/27/2006" (if the field you are typing

into requires the separators). This capability is called Advance on 6-Digit Date Entry and is enabled through the User Options menu. (From the Portal toolbar, select Preferences (checkmarks) and then select User Options.)

This feature requires Lawson Portal Service Pack 1 and later.

Line Action Codes

Line action codes represent the functions available for working with detail records on detail forms and on the detail area of a header/detail form. You enter these codes in the line action code field for each detail line in order to indicate what you want to do with each detail record. The line action code field is the left-most field on the detail line and is typically labeled “FC.”

Figure 34. Form clip (partial): Line action code field

The screenshot shows a form with two input fields: 'Company' and 'Employee', each with a right-click icon. Below these is a section labeled 'User Flds' which contains a table with the following structure:

FC	Type	Field Name	Value	Description
[dropdown]	[dropdown]		[input]	[dropdown]
[dropdown]	[dropdown]		[input]	[dropdown]
[dropdown]	[dropdown]		[input]	[dropdown]
[dropdown]	[dropdown]		[input]	[dropdown]

Examples of typical line action codes include:

Code	Description
Add (A)	For adding new detail records.
Change (C)	For changing existing detail records.
Delete (D)	For deleting existing detail records.
Select (X)	For selecting detail records (such as when you want to transfer the data to another form).

Drill Around Feature

The Drill Around[®] feature lets you view information without having to transfer to the form or forms where that information is maintained. For example, you could use the Drill Around feature if you were currently on a Benefits form updating benefit records, and your supervisor asked you to find an employee's salary history. From any Benefits form with a Company field, you could enter the number of the employee's company in the Company field and then use the Drill Around feature to view information about that employee.

The Drill Around feature is not available from all fields. It is available for a field if, when you right-click on the field, Drill appears as a choice.

The Drill Around feature uses the Drill Around form. The Drill Around form contains a Printable View option and an Explorer View option.

Figure 35. Form clip: Drill Around

Title	Description	Country	Status
Dr.	Dr.	United States of America	Active
Mr.	Mr.	United States of America	Active
Ms.	Ms.	United States of America	Active
Sir	Sir	Canada	Active

View 25 Records Previous 25 Next 25 Records 1 - 4

Figure 36. Form clip: Drill Around Explorer

DRILL EXPLORER

- [-] CAD
- [-] CAN
- [-] DEM
- [-] EUR
- [-] FRF
- [-] GBP
- [-] MAF
- [-] SEK
- [-] USD

Currency Code

View 50 Records Previous 50 Next 50 Records 1 - 1

Select Form

When you click the select indicator, the Select form appears if the valid values for the field come from another form. For example, the valid values for a vendor field come from the vendors set up through the application form for vendors. If you access the form for vendors, you can define additional vendors or you can delete vendors.

Use the Select form to select a value for a form field rather than view information about an item. The Select form appears when you use the Select indicator or right-click on a field and then click Select. It is not available for every field. It is available for a field if the Select indicator appears next to the field and if the field is one whose valid values come from another form.

When the Select form first appears, it contains either a list of the valid values for the field or a list of lookup methods. For example, as in the case of employees, the lookup methods are employee by number, by name, by social number, and so on. Depending on which lookup method you select, you will see a list of employees by number, name, and so on.

The Select form usually includes additional data about each item and thus helps you select the correct value. In addition, you can use the Customize option to list additional data associated with each item in the Select form.

Define a Record in Lawson Applications

Within Lawson applications, *define* means to create a new record for an entity used throughout your Lawson applications—a company, a vendor, a deduction class, a currency code, a tax authority, and so on.

You define a new record for an entity by accessing the application form for the entity. For example, the application form for defining vendors is *Vendor*. You access application forms for defining a new record either directly (that is, from a menu or through a search), or by right-clicking in a field for which valid values come from those created through the application form and then clicking Define. For more information, see "[Navigate and Search the Portal](#)" on page 15.

Selecting Values for Key Fields

This procedure explains how to select values for a key field. There are two methods for doing this depending on whether you use list-based or form-based navigations.

STEPS To select a value for a key field (list-based method)

1. Select the application form you want to work with from the navigation pane. (If it is not already in the navigation pane, perform a search.)
2. From the list of key fields that appears, select the field you want to work with. You can do this by:
 - Scrolling the list by using the Next and Previous links.
 - Performing a search. Type the criteria in the Search dialog box and click Find.

STEPS To select a value for a key field (form-based method)

NOTE If you use the form-based, rather than list-based method of viewing records, follow this procedure.

1. Click in the key field.
2. Click the select indicator or right-click on the field and then click Select.
Depending on the type of field, a drop-down list, a calendar, or the Select form appears.
3. Select a value:
 - From a drop-down list, click on the value you want. The value appears in the key field.
 - From a calendar, click the date you want. If you need a date from a different month than the current month, click the arrows to the left and right of the month name and then click the date you want. If you need a date from a different year than the current year, click the arrows to the left and right of the year and then click the date you want. The date appears in the key field.
 - From the Select form, double-click folders until you see the value you want. Click that value. The value appears in the key field.

Looking Up a Specific Record on an Application Form

These procedures let you access a specific record quickly. Choose the appropriate procedure depending on whether you are working with a single-record, detail, header/detail, or inquiry form. If it is a single-record, header/detail, or inquiry form, you must know the key fields required to access that record.

NOTE To go immediately to the form (even if you have not yet selected a record), click the form button at the top left of the form.

STEPS To look up a record on a single-record form (list-based)

1. Select the application form you want to work with from the navigation pane. (If it is not already in the navigation pane, perform a search.)
2. From the list of key fields that appears, select the field you want to work with. You can do this by:
 - Scrolling the list by using the Next and Previous links
 - Performing a search. Type the criteria in the Search dialog box and click Find.

In the following example, Vendor Group is the key.

3. If there are additional key fields that you need to select values for, repeat the previous step.
4. After you select values for the last required key field, the record appears in the form.

STEPS To look up a record on a single-record form (form-based)

1. Access the appropriate application form.
2. Type or select values for the key fields that identify the specific record you are looking up.
3. Click Inquire.

STEPS To look up a specific record on an inquiry form

1. Access the appropriate application form.
2. Type or select values for any filter fields on the inquiry form, if you want to search for a limited set of records. You might need to click a Filter button to access a subform that contains the filter fields.
3. Click Inquire.

Any detail records associated with the key fields and matching the filter field values appear in the detail area of the inquiry form.

4. If you want to change a detail record, select the record by typing X in the SC (Selection Code) field and then access the form for maintaining records of the type you have selected.

Browsing Through Records on Application Forms

The following procedures describe how you can browse through a series of records until you find the one you need. Choose the appropriate procedure depending on whether you are working with a single-record, detail, or header/detail form.

These procedures are most useful when you do not know enough about the record you need in order to search for that record specifically. For example, you should browse to find the correct employee record if you do not know the employee number (which is often a key field) but only know the employee's name.

STEPS Browsing forward through records on a single-record form

1. Access the appropriate application form.
2. Type or select values for the minimum number of key fields that are needed. For browsing, you will not need to enter values in all key fields. Usually, you enter a value in only the first key field, but sometimes you must enter values in all but the last key field (for example, the first two of three key fields). For more information, see "[Selecting Values for Key Fields](#)" on page 75.
3. Click Next.
4. Continue clicking Next to move forward through the records.

When there are no more records to view, the status bar displays a message to that effect.

NOTE If there is more than one key, you might need to change the value for the next to last key field to be able to continue browsing.

STEPS Browsing backward through records on a single-record form

1. Access the appropriate application form.
2. Type or select values for the key fields, placing the highest value possible in the last key field. (For numeric fields, the highest value will be all nines. For alphanumeric fields, the highest value will be all Zs.) For more information, see "[Selecting Values for Key Fields](#)" on page 75.
3. Click Previous.
4. Continue clicking Previous to move backward through the records.

When there are no more records to view, the status bar displays a message to that effect.

NOTE If there is more than one key, you might need change the value for the next to last key field to be able to continue browsing.

STEPS Browsing forward through records on a header/detail form

1. Access the appropriate application form.
2. In the header area, type or select values for the minimum number of key fields that are needed. For browsing, you will not need to enter values in all key fields. Usually, you enter a value in only the first key field, but sometimes you must enter values in all but the last key field (for example, the first two of three key fields). For more information, see "[Selecting Values for Key Fields](#)" on page 75.
3. Click Next.
4. If there are more detail records than can be displayed at one time in the detail area, click PageDown and PageUp to browse through the additional detail records.

– or –

Type a line number in the Position To field and click Inquire. The form displays records starting at the line number you entered.

5. Continue clicking Next to move forward through the records. (You will move to the next header record and its associated detail records.)
6. Repeat step 4.

When there are no more records to view, the status bar will display a message to that effect.

STEPS Browsing backward through records on a header/detail form

1. Access the appropriate application form.
2. In the header area, type or select values for the key fields, placing the highest value possible in the last key field. For more information, see ["Selecting Values for Key Fields"](#) on page 75.
3. Click Previous.
4. If there are more detail records than can be displayed at one time in the detail area, click PageDown and PageUp to browse through the additional detail records.

– or –

Type a line number in the Position To field and click Inquire. The form displays records starting at the line number you entered.

5. Continue clicking Previous to move backward through the records. (You will move to the previous header record and its associated detail records.)
6. Repeat step 4.

When there are no more records to view, the status bar will display a message to that effect.

Viewing Data Through the Drill Around Feature

The Drill Around feature lets you view data without having to transfer to the form or forms where that information is maintained. It is an especially useful feature if you do not want to access a different application form and want to view data that is related to one of the fields on the current form.

STEPS Viewing data through the Drill Around feature

1. Right-click in a field that lets you use the Drill Around feature and choose select, or select the Drill icon.
2. Click Explorer View.

The Drill Explorer appears.

3. Expand folders in the Drill Around form by clicking the folders or the plus signs next to them. You cannot click on gray folders (they refer to items with no data).
4. Continue clicking folders until the data you want to view appears in the right pane or, when Detail icons appear, click these to view the data associated with them in the right pane.

Performing a Search Using the Drill Around Data

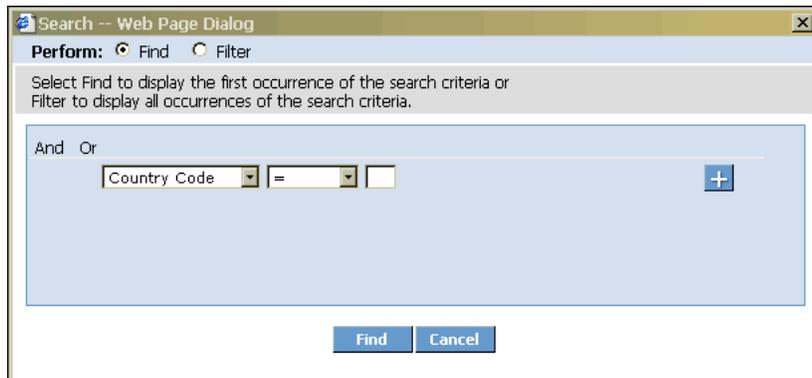
Use the Drill Search option to enter search criteria or filter to display all occurrences of the search criteria.

The Drill Search option is only available in drill.

STEPS To perform a search in Drill

1. From the Drill Around dialog box, click Search. The Search dialog box appears.

Figure 37. Form clip: Drill Search



2. Select the Find or Filter option. Enter the criteria and select Find to perform a find, or select Filter to filter the criteria.

The results appear in the Drill Around dialog box.

Adding a Record

Adding records is a basic part of setting up, updating, and maintaining your data. For example, you must create records or define the entities for which you need to store and process information, such as companies, employees, or vendors.

STEPS To add a new record

1. Access the single-record or header/detail form you want.
2. Type or select values for all key fields.
3. Click Inquire. (Performing the Inquire form action is not always required but is a good idea in order to check for existing records with the same key fields. If the record already exists, you can then check whether you entered the correct key fields.)
4. Type or select values for other fields.
5. Click Add.

If the record you have just created has no invalid data or if it is not missing any required data, the “Add Complete - Continue” message appears.

Defining a Record

Defining a record is essentially the same as adding a record. However, you can think of defining a record as the process of creating the valid values to be used by other application forms. For example, you need to define valid values for such basic entities as company, employee, vendor, and so on. In addition, as the following procedure describes, you can access the form for defining valid values directly from the field that needs those values.

STEPS To define a record

1. Access an application form that contains a field that you want to define valid values for.
2. Right-click the field whose valid values you want to define.
3. Select Define.

The application form for defining valid values for that field appears.

4. Type or select values for all key fields.
5. Click Inquire. (Performing the Inquire form action is not always required but is a good idea in order to check for existing records with the same key fields. If the record already exists, you can then check whether you entered the correct key fields.)
6. Type or select values for other fields.
7. Click Add.
8. If the record you have just created has no invalid data or if it is not missing any required data, the “Add Complete - Continue” message appears.
9. Close the application form to return to the form you were working with previously.

– or –

Access the application form that defines the values you need. For more information, see ["Adding a Record"](#) on page 79.

Changing a Record

STEPS To change a record

1. Access the single-record or header/detail form you want.
2. Look up the record whose values you want to change.
3. Type or select new values for one or more fields.
4. Click Change.

Deleting a Record

STEPS To delete a record

1. Access the single-record or header/detail form you want.
2. Look up the record you want to delete.
3. Click Delete.

A dialog box may appear, asking you to confirm that you want to delete the record.

4. If necessary, click Yes to confirm that you want to delete the record.

IMPORTANT If you delete the header record for a header/detail form, you will also delete all of the detail records associated with the header record.

Adding, Changing, and Deleting Detail Lines

STEPS To add detail lines

1. Access the detail or header/detail form you want.
2. Display records.
 - If you are working with a detail form, click Inquire to display any existing records.
 - If you are working with a header/detail form, look up the header record you want.
3. Type **A** in the line action code field of one or more blank detail lines. (This field is the left-most field.)
4. Type or select values for the fields in the detail lines you are adding.
5. Click Change.

STEPS To change detail lines

1. Access the detail or header/detail form you want.
2. Display records.
 - If you are working with a detail form, click Inquire to display any existing records.
 - If you are working with a header/detail form, look up the header record you want.
3. Type **C** in the line action code field of one or more existing detail lines. (This field is the left-most field.)
4. Type or select new values for the fields you are changing.
5. Click Change.

STEPS To delete detail lines

1. Access the detail or header/detail form you want.
2. Display records.
 - If you are working with a detail form, click Inquire to display any existing records.
 - If you are working with a header/detail form, look up the header record you want.
3. Type **D** in the line action code field of one or more existing detail lines. (This field is the left-most field.)
4. Click Change.

Adding a Comment Attachment

This procedure describes how to add a comment attachment to a record.

STEPS To add a comment attachment

1. Access a form that has attachment capabilities.
2. Right-click the field that you want to attach the comment to.
3. Select Attachments. The Attachments form appears.
4. Click the Comments folder on the left pane of the Attachments form.
5. Click through the folders until you get to the Add Comment folder.
6. Click the Add Comment folder. The Comment Entry pane appears in the right side of the Attachments form.
7. Enter the title of the comment and the associated text and click the Add button.

The message “ADD WAS SUCCESSFUL” appears at the bottom of the form to confirm that the comment was added. The comment also appears in the list of folders in the left pane.

Adding a URL Attachment

This procedure describes how to add a URL attachment to a record.

STEPS To add a URL attachment

1. Access a form that has attachment capabilities.
2. Right-click the field that you want to attach the URL to.
3. Select Attachments. The Attachments form appears.
4. Click the URL folder on the left pane of the Attachments form.
5. Click through the folders until you get to the Add URL folder.
6. Click the Add URL folder. The URL Attachment Entry pane appears in the right side of the Attachments form.
7. Enter the title and the URL and click the Add button.

The message “ADD WAS SUCCESSFUL” appears at the bottom of the form to confirm the URL attachment was added. The URL attachment also appears in the list of folders on the left pane.

Portal Quick Reference

Search

Search

You can perform a search from the Search text box located at the top of the navigation pane. Just type in a key word, for example, the name or partial name of a program you want to run. The system searches your list of bookmarks first and then searches all applications. The more specific you are in your search, the faster the search results will appear.

You can enter a token number (if known) in the Search text box, and it will provide you direct access to a Lawson ERP application.

To perform a simple search

1. Log in to the Portal and place your cursor in the Search text box.
2. Type as much information as you know about the search item.
3. Press Enter or select the Search Lawson Applications icon.

A list of topics that met your search criteria appears on the Search Results dialog box.

Quick Search URLs

When you click on the Search Links Menu (the arrow to the right of the Search text box), you can immediately launch one of the search engines and other resources. Lawson has predefined options for Bookmarks, the Lawson Knowledge Base, and popular Internet search engines, including Yahoo, MSN, and Google.

To perform a quick search

1. Click the Search Links Menu.
2. Select the system or web site to search.

Drill Around / Find

NOTE The Drill Around feature is only available on certain key fields. The field must contain data to display the drill selection.

The Drill Around feature lets you view data without having to transfer to the form or forms where information is maintained. It is an especially useful feature if you do not want to access a different application form and want to view data that is related to one of the fields on the current form.

Viewing Data through the Drill Around Feature

1. Right-click in a field lets you use the Drill Around feature.
2. Click Drill Around.
The Drill Explorer appears.
3. Expand folders in the Drill Around form by clicking the folders or the plus signs next to them. You cannot click on gray folders (they refer to items with no data).
4. Continue clicking folders until the data you want to view appears in the right pane.

Performing a Drill Select from the Drill Explorer View

This feature allows you to perform a drill select from the Drill Explorer view.

1. From the Drill Explorer view, drill to the appropriate selection.
2. Right-click and click Select. Your selection is automatically entered on the form.

Jobs and Reports

This section provides you with information on how to navigate to the different pages used to manage Lawson jobs and reports. You may access the jobs and reports pages from a bookmark or shortcut. these pages are also accessible from the Lawson batch forms.

You can access the following from jobs and reports:

- Job List — The Job List link displays the jobs you have defined and any reports that are associated with those jobs.
- Job Schedule — The Job Schedule link displays a list of active jobs, jobs waiting, or jobs completed.
- Print Files — The Print Files link displays reports for a specific user.
- Multi-Step Job Definition — The Multi-Step Job Definition link displays a form to define multi-step jobs.
-

Job List

Action

Use any of the options listed below to perform the action

Submit Job	<ul style="list-style-type: none"> Click Submit from the Job Actions menu on the toolbar. The Submit Job dialog box appears. Click Submit. The Submit Job dialog box appears. Enter the necessary information and click Submit. Right-click on the selected row and select Submit. The Submit Job dialog box appears. Enter the necessary information and click Submit. Double-click the row. The Submit Job dialog box appears. Enter the necessary information and click Submit.
View Parameters	Right-click on the selected row and select View Parameters.
View Reports	<ul style="list-style-type: none"> Right-click on the selected row and select View (report name). For example, view cu201.prt.
Delete Job	<ul style="list-style-type: none"> Select the job(s) for deletion and click Delete from the Job Actions menu on the toolbar. Click Yes to delete the jobs. Right-click on the selected row and select Delete. A dialog appears and lists the jobs selected for deletion. Click Yes to delete the jobs.
Multiple Delete	Check the records you want to delete and click Delete and select Delete from the Job Actions dropdown menu on the toolbar.
View Log	<ul style="list-style-type: none"> Click View Log from the Job Actions menu on the toolbar. Right-click on the selected row and select View Log.
Print Files link	Click Print Files from the Related Forms menu.
Select All Check Box	Select the Check box next to the Job Name. This automatically selects all of the jobs in the list.

Job Schedule

Action	Use any of the options listed below to perform the action
Completed Jobs tab	
View Log	<ul style="list-style-type: none"> • Click View Log from the Job Actions dropdown list. • Right-click on the selected row and select View Log. • Double-click the row.
Delete Job	<ul style="list-style-type: none"> • Click Delete from the Job Actions dropdown list. • Right-click on the selected row and select Delete.
Multiple Delete	Check the records you want to delete and click Delete from the Job Actions dropdown list.
Submit Job	<ul style="list-style-type: none"> • Click Submit from the toolbar. • Right-click on the selected row and click Submit.
Select All Check Box	Select the Check box next to the Job Name.
Active Jobs tab	
View Log	<ul style="list-style-type: none"> • Click View Log from the Job Actions dropdown list. • Right-click on the selected row and select View Log. • Double-click the row.
Waiting Jobs tab	
View Log	<ul style="list-style-type: none"> • Click View Log from the Job Actions dropdown list. • Right-click on the selected row and select View Log. • Double-click the row.
Delete Job	<ul style="list-style-type: none"> • Click Delete from the Job Actions dropdown list. • Right-click on the selected row and select Delete.
Multiple Delete	Check the records you want to delete and click Delete from the Job Actions dropdown list.

Submit Job	<ul style="list-style-type: none"> Click Submit from the toolbar. Right-click on the selected row and select Submit.
Run Job Immediately	<ul style="list-style-type: none"> Click Run Immediately from the Job Actions dropdown list. Right-click on the selected row and select Run Immediately.
Recover Job	<ul style="list-style-type: none"> Click Recover from the Job Actions menu. Right-click on the selected row and select Recover Job.
Select All Check Box	Select the Check box next to the Job Name.

Print Files

Action	Use any of the options listed below to perform the action
View Report	<ul style="list-style-type: none"> Click View from the Report Actions menu. Right-click on the selected row and select View. Double-click the row.
Print Report	<ul style="list-style-type: none"> Click Print from the Report Actions menu. Right-click on the selected row and select Print.
Delete Report	<ul style="list-style-type: none"> Click Delete from the Report Actions menu. A confirmation dialog box appears. Click Yes. Right-click on the selected row and select Delete.

Viewing Report

Action	Use any of the options listed below to perform the action
Print Files link	Click Print Files from the Related Forms menu.
PDF layout options	Select the appropriate section from View Options.
Refresh report	Click on the Related Forms item that corresponds with the print file name.
View Parameters	Click Parameters from the Related Actions menu on the Reports tab.
Submit Job	Click Submit. Enter the appropriate information in the Submit Job dialog box and click OK.
Print Report	Click Print from the toolbar. Then, click Print from the Print Report dialog box.
Create CSV file	Click the Create CSV file button.

Related Actions

The Related Actions section lists all actions valid to the jobs or reports displayed. To invoke an action, first highlight the job or report you want to target by clicking on the appropriate row. Then, click the desired action. You may also right-click on the job or report to display a context menu of all the valid actions.

The Report Properties action is found on batch forms. Use this action to modify report properties. It does not display your reports; instead, use the Print Files link.

Multiple Deletes

Use the Select All Check box (located next to the Job Name) to quickly select all the jobs or reports on the page that may be deleted. Then, click Delete to delete the records. A dialog box appears listing the reports selected for deletion. Click Yes to delete them.

To delete selected jobs, check the jobs you want to delete and click Delete. A dialog box appears listing the reports selected for deletion. Click Yes to delete them.

Searching Options

Use Search dialog box to find a specific job or report. You may also filter the list of jobs or reports. This option is available when one or more pages of jobs or reports exists.

Figure 38. Form clip: Find and Filter options

Search -- Web Page Dialog

Perform: Find Filter

Select Find to display the first occurrence of the search criteria or Filter to display all occurrences of the search criteria.

Find Field: Job Name = Find Value

Find Cancel

Lawson Portal Hotkeys

Hotkeys let you perform a specific operation quickly with keystrokes rather than menu selections. Within the Portal, the hotkeys shown in the table below are not default hotkeys. The Lawson Portal Help menu contains a list of the default hotkeys.

NOTE A plus symbol (+) between the keys means press the keys at the same time.

Lawson Portal

Action	Hotkey	Description
Submit	F12	Submits the current form for processing
Close/Cancel	Esc	Closes/cancels the open item
Refresh	Ctrl+Shift+F5	Refreshes the screen
Delete	Ctrl+Shift+D	Delete a record
Next	Ctrl+Shift+N	Display the next record
Previous	Ctrl+Shift+P	Display the previous record
Page Up	PageUp	Display the previous set of detail records
Page Down	PageDn	Display the previous set of detail records
Tab Page Up	Ctrl+PageUp	Move to the next tab
Tab Page Down	Ctrl+PageDn	Move to the previous tab
Position in First Field	Ctrl+Alt+F	Move to the first field on the form
Display Field Help	Ctrl+Shift+H	Open field help
Display Form Help	Shift+F1	Open form help
Display Hotkey Help	Alt+K	Displays the Portal hotkeys help
Position in Navigation Bar	Shift+F7	Cursor moves to the Navigation bar
Position in Search Box	Shift+F8	Cursor moves to the Search box
Position in toolbar	Shift+F9	Cursor moves to the toolbar
Display Home Page	Ctrl+Home	Portal Home page
Show Context Menu	Shift+F10	Displays the context menu

Lawson ERP Forms

Action	Hotkey	Description
Open/Select Field Context	Enter	Opens the context associated with the field
Move to Action Selection	F9	Positions the cursor in the dropdown list

Perform Add Transaction	Ctrl+Shift+A	Add a record
Perform Change Transaction	Ctrl+Shift+C	Change a record
Perform Inquire Transaction	Ctrl+Shift+I	Inquire on a record
Clear to End of Form	Ctrl+Shift+K	Clear all fields from the current field to the end of the form
Clear Entire Form	Ctrl+Shift+X	Clear all fields
Clear Current Field	Ctrl+Shift+Y	Clear the current field
Open Define Screen	Ctrl+Shift+F	Open form where a field value is defined
Open Attachments Screen	Ctrl+Shift+T	Display attachments related to a field
Open Drill Screen	F5	Use the drill around feature on a field
Copy Detail Field	Shift+F2	In a grid or detail area, copy data from the previous row's matching cell to the current cell
Copy Detail Field Inverse	Ctrl+Shift+F2	In a grid or detail area, copy data from the previous row's matching cell to the current cell
Display Field Information	Ctrl+Shift+O	Display technical field information
Display Form Wizard	Ctrl+Shift+W	Display the wizard for available forms
Position Focus in Detail Tab Region	Ctrl+Shift+PageDn	Move to the detail tab area
Position Focus in Detail Tab Region	Ctrl+Shift+PageUp	Move to the next tab up on a form with multiple tabs
Scroll Next Field Value	Down Arrow	Move down through the list of fields
Scroll Previous Field Value	Up Arrow	Move up through the list of fields
Move to Next Row	Shift+Down Arrow	Move to the next row
Move to Previous Row	Shift+Up Arrow	Move to the previous row

Lawson ERP Jobs and Reports

Action	Hotkey	Description
Active Jobs	Shift+A	Displays the active jobs currently being run
Waiting Jobs	Shift+W	Displays the jobs waiting to be run
Completed Jobs	Shift+C	Displays the completed jobs
Print Files	Shift+P	Displays the print files or job schedule

Documentation Conventions and Support

Documentation Conventions

This document uses specific text conventions and visual elements.

Text Conventions

This	Represents
bold	A key name or function key name. For example, Shift is a key name and Help (F1) is a function key name. A value or command that you must type exactly as it appears. A program or file name.
<i>italics</i>	A manual title or form name. An emphasized word or phrase. A placeholder for a user-defined value or variable.

Visual Elements

STOP Information that you must know before you attempt the procedure or process.

IMPORTANT Important information that you must consider when you perform the procedure.



CAUTION Cautionary information about actions that involve a risk of possible damage to equipment, data, or software.



WARNING Warning information about actions that involve a risk of personal injury or irreversible destruction to the data or operating system.

Product Documentation

Lawson offers the following product documentation:

- Online help
- User guides and manuals
- Release notes and installation instructions

To find Lawson documentation, see the user interface or <http://support.lawson.com>. To obtain a login password and ID for the Support site, see your organization's Lawson contact or your Lawson client manager.

Global Support Center

Lawson Global Support Center (GSC) services are available to all Lawson customers who are on maintenance support for Lawson products. See the *Global Support Manual* for the following information:

- What information to gather before you contact the GSC
- How to contact the GSC
- How the GSC processes your request
- Which services are standard maintenance and which are billable

To find the *Global Support Manual*, see <http://support.lawson.com>. To obtain a login password and ID for the support web site, see your organization's Lawson contact or your Lawson client manager.

Documentation Contact

We welcome your questions or suggestions about Lawson documentation. Please send comments to documentation@lawson.com.

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