FLEXX®
Administration Guide

Reference Manual

Version 7.0L0

Databyte

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(Description has been moved to FLEXX Implementation Guide)

1.0   Internal File Maintenance

This section describes the Internal File Maintenance functions of FLEXX.

Select

Main Menu	→	Administration Menu	→	System File Maintenance	→	Internal File Maintenance
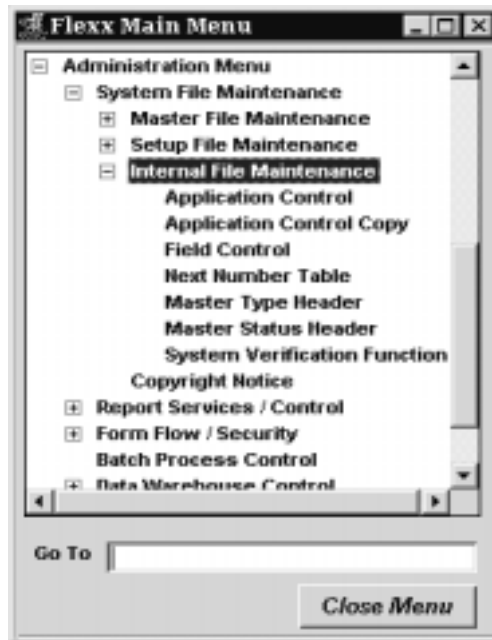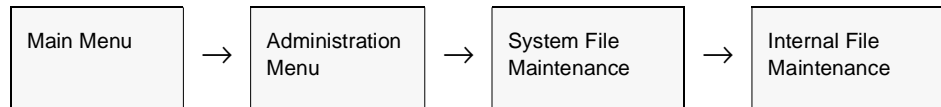
Notes: The Master File Maintenance and the Setup File Maintenance menus are described in the
FLEXX Getting Started manual.

1.1   Application Control Table

Description   The Application Control Table allows FLEXX modules to be further customized to fit company specific needs. For example, the FLEXX Quotation Management module can be set up to do either price table based pricing or cost plus markup based pricing. The choice is determined through the use of entries on the Application Control Table. As each FLEXX module is started up, the Application Control Table is checked for settings that may affect the operation of that module. Some settings in the table are company specific (defined for the *default* company) and some are global in nature *(*defined for company '*setup'*). Explanations for each of the possible Application Control settings are described in the manual for each application module as well as in the *FLEXX Implementation Guide, Sec. 4*.

Below are descriptions of some of the general system settings. **Please refer to the FLEXX Implementation Guide, Topic** *Application Control Table* **for a complete description of all FLEXX settings, both module specific and general.**

Select

Main Menu & Administration Menu	→	System File Maintenance	→	Internal File Maintenance	→	Application Control

The Application Control Table appears in Update mode.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The code of the company that the settings will affect. Some of the Application Control settings are company specific and some are global. The default company "setup" is used to set the global controls. Whether an application control setting is defined by each company or globally are described in each FLEXX application module.	Session Default	Y
Application	The name of the application that the setting will affect, i.e. 'op' for Order Processing.		Y
Type	The type of control.		Y
Description	The description of the control.		N
Value	The value of the Application Control, such as 'on' or 'off'.		Y
Parameter	A further parameter setting to define the control. This field is not used for all types so care must be taken to ensure it is defined where required.		N

Application
Control
Setting

The following Application Control settings can be entered to be used by all FLEXX modules. This is due to the fact that the Company code is "setup".

Application	Type	Description	Value	Company	Parameter
defaults	division	Use default division?	Y or N	setup	

With division set to Yes, when a user first logs into FLEXX, the division field on the Session Default form is populated with the default division as specified on the user's User Master form. If the flag is set to No the division field will be a null value and will need to be manually entered with a validly defined Division code.

Application	Type	Description	Value	Company	Parameter
main	batctrl	Default Batch Control	Off or ON	setup	

With the flag set to On, when a user first logs into FLEXX, the Use Batch flag will be checked with the assumption that all accounting transactions entered into FLEXX will be assigned batch numbers. If the flag is set to OFF, an end user can manually select the Use Batch field if batch processing is desired.

Application	Type	Description	Value	Company	Parameter
main	security	FLEXX Security	Off or ON	setup	

This setting basically lets FLEXX know if you want to make use of the security options (See Sec. 3.0) or not. If FLEXX does not find this setting in Application Control, it assumes the security is ON and active. Should the need arise to turn off all of the security options set the value to "OFF".

Application	Type	Description	Value	Company	Parameter
all	phone	Constraint Phone Number	Y or N	default	
all	postal code	Constraint Postal Code	Y or N	default	

With the flag set to Yes, all FLEXX modules are checked for Telephone Number and Postal Code entry. Where Telephone Numbers and Postal Codes are entered, they must meet a predefined format of xxx-xxx-xxxx for Telephone Numbers and A#A-#A# (Canada), or ##### or ####-#### (United States) for Postal/Zip Code.

Application	Type	Description	Value	Company	Parameter
all	zipcode	Check Zip Code	Y or N	default	checkflag
all	zipcode	Zipcode fallback number	3 (or any user value)	default	length

The zipcode variable with 'checkflag' parameter is used to have FLEXX validate the entered zip code against the values (not formats) defined in the Zip Code Table *(See Getting Started manual)*.

The zipcode variable with 'length' parameter is used with the Zip to Zone and Freight Carrier determination process *(See Getting Started manual)*. It defines the length of the zip code to be used if the code entered on the is not the exact value.

Application	Type	Description	Value	Company
all	decimals	Number of decimals in reports	4 (any user value up to 6)	setup
all	decimal_pr	Number of decimals for Unit Price	5 (or any user value up to 6)	setup

The decimals value is used to indicate to FLEXX the number of decimal places to print for the quantity and dollar values on the different FLEXX reports. FLEXX will default to 4 decimals, and this can be set to any value from 1 to 6.

The decimal_pr value is used to define the number of decimal places to use when calculating the SKU Unit Price on a sales order. By default, FLEXX will calculate the price to 6 decimal places, but this can be set to any value from 2 to 6.

Application	Type	Description	Value	Company	Parameter
all	caseconv	Case Conversion type on Codes	NONE, UPPER, LOWER	default	codes
all	caseconv	Case Conversion type on Names fields.	NONE, UPPER, LOWER	default	name

The *caseconv* variables are used to set the case specifications for the code and/or name fields on the SKU Master, Customer Master, and Vendor Master definitions.A default of NONE will allow any case, where UPPER and LOWER will restrict the entries to that case only. This case will be used for all entries as well as for searches.

Application	Type	Description	Value	Company	Parameter
report	rptctrl	Default rpt. prompt interval	#	setup	promptival

If a report is being run locally (versus using the FLEXX Report Scheduler) the value entered represents how long the report will run before an error message appears. The error message "Continue waiting for report to complete?" appears after the stated time interval in minutes. The report will continue to run if no action is taken. However, if the No button is pressed, the report will be terminated and error message "Report failed to run or did not complete" will be displayed.

Application	Type	Description	Value	Company	Parameter
report	rptctrl	Default rpt. time-out (min)	10	setup	rpttimeout

The value entered here is how long the report has to update the database with a new page number. In this example as long as the page numbers of the report are being updated at least every 10 minutes, the report will be allowed to continue to run. If page numbers are not updated within the time allowed the report will time-out. The report will then be terminated.

Application	Type	Description	Value	Company	Parameter
report	rptctrl	Rpt. status check interval (sec)	10	setup	statusival

The value entered here represents the time interval in between which the progress of the report print is displayed. In other words with a value of 10 seconds entered, the progress of the report is checked every 10 seconds and the result displayed. The progress is displayed as number of pages generated - i.e. Page 1, 2, etc.

Notes   *Please refer to the FLEXX Implementation Guide for complete details on all Value and Parameter settings.*

1.2   *Application Control Copy Function*

Description   The Application Control Copy Function allows you to copy existing application control settings from an existing company to a new one. Once copied to the new company the settings can be modified, deleted and/or modified. This is especially useful when initially setting up your company. Rather than entering all the desired Application Control parameters, they can be copied from an internal default system company called "setup" and then modified or deleted as required.

NOTE: This process should be used at initial company set up to copy the table from company 'setup' to your new company.

Select

Administration Menu	→	System File Maintenance	→	Internal File Maintenance	→	Application Control Copy
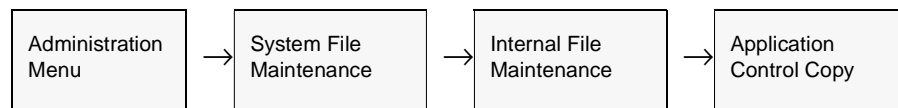
The Application Control Copy Function appears in Update mode.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code of the company whose application control settings will be copied.	setup	Y
Application	The name of the application whose settings will be copied or accept the default to copy all application settings.	*	Y
Type	The type of control to be copied or accept the default to copy all types	*	Y
Company	The Company Code of the company that the application control settings will be copied to.		Y
Start	Press this button to begin the copy function.		

1.3   *Next Number Table*

Description   The Next Number Table identifies to the FLEXX modules what numeric value to assign the next transaction; i.e. receipt, invoice, voucher, payment, customer, vendor, etc. The default field, value and comment settings are created for each company at the time of its creation. These default settings are copied over from an internal system company called "setup". It is then possible to change these defaults to match each individual company's next or starting numbers.

Select

Administration Menu	→	System File Maintenance	→	Internal File Maintenance	→	Next Number Table
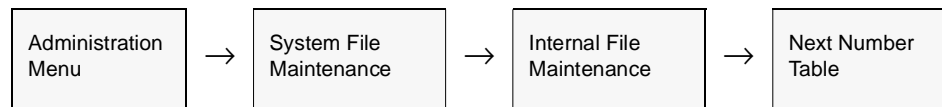
The Next Number Table appears in Find mode. Press FIND to display all entries.

Notes   Any values entered in fields "Length, Char, Prefix and Suffix" will only work where the value auto-created in FLEXX is a string-type (alphanumeric) field. Some values in FLEXX are strings and some are numeric. The auto-created string values will have the word "AUTOGEN" default in the number field (i.e. Invoice number) and auto-created numeric values will have the value "99999" appear (i.e. Order Number) before the actual number is assigned.

Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code of the company whose Next Number settings are received.		Y
Field	The database field name of the Next Number field in each FLEXX application. Each default field name is further described below.		Y
Value	The starting number for the process.		Y
Length	The required length of the value. Any information entered here is only used in areas where FLEXX is auto-creating the value. i.e. Invoice Number, Voucher Number, etc. (Example: to have a 7 digit code starting with 0001001 the value is 1001 with a length of 7).	0	N
Char	The character used to preface the value to reach the required length specified previously.		N
Comment	An end user defined description of the name of the field.		N
Prefix	Any string or character that will preface the value.*(See Prefix Note below)*		N
Suffix	Any string or character that will append to the value.		N
User Dependent	Not currently used by FLEXX.		N

Prefix Note: The following Prefix values are restricted and should not be used:
     Δ   **C** - Customer Repair Order invoice from Repair/Warranty
     Δ   **P** - Sales Order invoice from OP
     Δ   **R** - Receipt record from AR
     Δ   **S** - Invoice from Subscription
     Δ   **V** - Vendor Repair Order invoice from Repair/Warranty
     Δ   **W** - Work Order invoice from Time Billing
     Δ   **X** - On Account invoice record from AR.

Fields

The following next number defaults will be created as a result of company creation

Field	Comment	Module	Description	Company
ap_check_no	AP Check Number	AP	The next AP check number at FLEXX Payment generation.	default
ap_cheque_no	AP Check Number	AP	The next AP check number at FLEXX Payment generation.	default
bank_BNS	Bank Check Number	AP	This value is only created when a new bank code is created. This allows there to be different check numbers for each bank. The extension (i.e. BNS) is the same as the bank code defined in the Bank table.	default
cont_key	Container Key	IC	Used internally by FLEXX and should not be adjusted.	default
cus_cd	Customer Code	AR	Value assigned the next customer created.	default
cusci_seq_no	Interests by Contact	CM	The Contact Interests sequence number	default
disc_uid	Discount ID	AR	The Customer Discount ID code	default
emp_cd	Employee Code	payroll	Value assigned the next employee.	default
fa_no	Fixed Asset No.	FA	Value assigned the next fixed asset.	default
inv_no	Invoice Number	AR	Value assigned the next invoice.	default
inv_onacct_no	On Account Number	AR	Value assigned the next on-account transaction, prefixed with an "X". **Note: It is required that a 'X' prefix be used with the On Account number.**	default
ir_seq	Interest Key	AR	Key number value assigned the next interest invoice.	default
jcj_cd	Job Costing Job Code	JC	Value assigned the next job created.	default
job_no	Job Number	OP	Value assigned the next sales order created.	default
nvtm_no	Inventory Movement Number	IC	Value assigned the next Inventory Movement record. Used internally by FLEXX and should not be adjusted.	default
payment	AP Payment Number	AP	Value assigned to the next vendor payment.	default
po_no	PO Number	PO	Value assigned to the next purchase order and/or purchase requisition.	default
prb_problemno	Work Order Number.	TB/WO	Value assigned to the next Work Order or Time Billing record.	default
quote_num	Quote Number	QM	The next number assigned to a new Quotation.	default
rct_no	AR Receipt Number	AR	Value assigned to the next receipt transaction created.	default
recenter	AP, AR and PR Data Entry	BR	Used internally in Bank Reconciliation by FLEXX and should not be adjusted.	default
recstmt	Statement Entry	BR	Used internally by FLEXX and should not be adjusted.	default

Field	Comment	Module	Description	Company
rinv_id	Recurring Billing Code	AR	Value assigned to the next recurring billing ID code where the Autogen feature is used.	default
rma_no	RMA Number	OP	The next assigned RMA number.	default
sa_keyx	Salesman Key	AR	Value assigned the next salesperson	default
serial_seq_no	Serial Number	IC	Next number used to autogen a Serial Number for a SKU.	default
ship_cd	Shipment Code	OP	Value assigned to the next shipment record created.	default
subs_cd	Subscription Code	SUB	Value assigned the next subscription created.	default
tran_code	GL Transaction Code	GL	Value assigned to the next general ledger transaction created.	default
ven_cd	Vendor Code	AP	Value assigned to the next vendor created.	default
vou_no	Voucher Number	AP	Value assigned to the next voucher created.	default
wom_jnum	RW Job Number	RW	Value assigned to the next Repair Order created.	default
workorder_no	Work Order Number	TB	Value assigned to the next Time Billing work order.	default
There are a number of additional entries for the "setup" company only and these should not be changed except on advice from FLEXX Support.				

1.4   *Master Type Header*

Description   The Master Type Header record contains the field information required for any "Types" in FLEXX. There are hundreds of "Type" Headers used in FLEXX such as Payment Type and GL Journal Type to name a few examples. The Type tables are automatically created when the FLEXX system is initially installed. On non-system defined tables, it is possible to change or add entries as required for various functions to perform as desired (e.g. add Customer Price Type values). However, under no circumstances should a Master Type Header record be deleted.

Select

Administration Menu	→	System File Maintenance	→	Internal File Maintenance	→	Master Type Header

The Master Type Header form appears in FIND mode.

Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Type Code	The Master Type Code to identify the Master Type.	System assigned	Y
Heading	Description of what the Master Type is for.	System assigned	N
System Defined	If this box is checked then master type detail records cannot be modified.		N
Required	Enter "Y" if the field is required. In other words the field must have a Type Value (See Master Type Detail) in it versus leaving the field with a blank or null value.	Y	Y
Return Key	Enter "Y" if the Type Value is to be returned after using the ZOOM function.	Y	Y
Reference	Enter"Y" if FLEXX is to perform a validity check on the Type Value entered on the field. With this flag set to "Y", if someone enters a Type Value that doesn't exist, an error message will appear "Invalid entry - type code not found". If the flag is set to "N" no validity check is performed and any Type Value can be entered.	Y	Y
Case Conversion			
Fld Length	The length limit of the field.		
Attribute 1 Attribute 2	Attributes that will serve as labels to the master type detail flags.		N
Flag 1 Flag 2	Flags that will serve as labels to the master type detail flags.		N

To review the Master Type Detail records press <<Next Form>>.
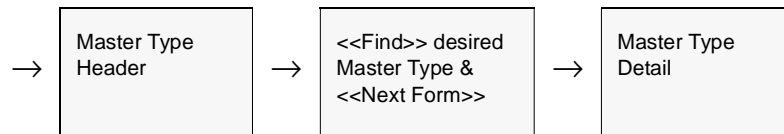

Notes   It is possible to access the Master Type Header form using zoom on the Type code of the Master Type Detail form.

1.5   *Master Type Detail*

Description   The Master Type Detail records contain the available values that each type can have. These values are automatically created when the FLEXX system is initially installed. Under no circumstances should any of these values be deleted. It is acceptable to add new values but there will be no underlying code to use them.

Select

```
        ┌─────────────┐       ┌─────────────┐       ┌─────────────┐
   →    │ Master Type │   →   │ <<Find>> desired │ → │ Master Type │
        │ Header      │       │ Master Type &    │   │ Detail      │
        │             │       │ <<Next Form>>    │   │             │
        └─────────────┘       └─────────────┘       └─────────────┘
```

The Master Type Detail appears in Update mode.

Value	Description	Sys Status	Seq	Default
o	Period Open	open	1	☐
n	Period Never Opened	neveropen	2	☐
p	Period Pre-Closed	preclosed	3	☐
c	Period Closed	closed	4	☐
x	Period Permanently Closed	permclosed	5	☐

Company: bucker   Type: 1

AAAA ********************
BBBB ********************
CCCC ☐
DDDD ☐

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company Code of the company employing these values.	Session Default	Y
Type	The Master Type Code used to link the Master Type Header with the appropriate values.	Master Type Header	Y
Values	The values that the Type can process.	System Assigned	Y
Description	A short description of the value.	System Assigned	N
Sys Status	A system status code used internally by FLEXX and should not be adjusting.	System Assigned	Y
Seq	The sequential order in which the Types will appear.	System Assigned	Y
Default	If checked, then this value will be used as a default value to fields that are defined by this master type.	off	N
Attribute 1 Attribute 2	Attributes defined for the master type detail. The label names are set by master type header attributes.		N
Flag 1 Flag 2	Flags defined for the master type detail. The label names are set by master type header flags.		N

Notes

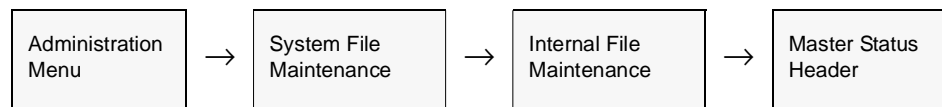It is also possible to access the Master Type Detail Table by way of zooming on a Type (category or class) field on a particular form. This will present the Master Types (green) form showing the descriptions of the defined codes, and then <<Next Form>> will present the Master Type Detail form. Depending on whether it is System Defined, the values can be modified or new values added to suit the user's needs.

1.6 *Master Status Header*

Description   The Master Status Header record contains the field information required for any status codes in FLEXX. There are numerous "Status" headers used in FLEXX such as Customer Status and Employee Status to name a few examples. The status tables are automatically created when the FLEXX system is initially installed. Under no circumstances should a Master Status Header record be deleted. Only those defined as non-system defined (System Defined flag off) can be altered, but existing entries should not be changed or deleted.

Select

```
┌─────────────┐     ┌─────────────┐     ┌─────────────┐     ┌─────────────┐
│Administration│ →  │System File  │ →  │Internal File│ →  │Master Status│
│Menu         │     │Maintenance  │     │Maintenance  │     │Header       │
└─────────────┘     └─────────────┘     └─────────────┘     └─────────────┘
```

The Master Status Header form appears in FIND mode.

Fields   The following fields appear on the screen.

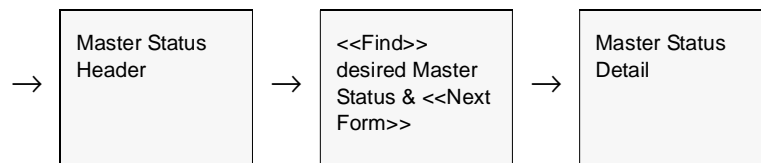| Field	Entry	Default	Reqd
Type Code	The Master Type Code to identify the Master Status.	System Assigned	Y
Heading	Description of what the Master Status is for.	System Assigned	N
System Defined	If this box is checked then master status detail records cannot be modified.		N
Required	Enter "Y" if the field is required. In other words the field must have a Status Value (See Master Status Detail) in it versus leaving the field with a blank or null value.	Y	Y
Return Key	Enter "Y" if the Status Value is to be returned after using the ZOOM function.	Y	Y
Reference	Enter "Y" if FLEXX is to perform a validity check on the Status Value entered on the field. With this flag set to "Y", if someone enters a Status Value that doesn't exist, an error message will appear "Invalid entry - Status code not found". If the flag is set to "N" no validity check is performed and any Status Value can be entered.	Y	Y
Case Conversion	**Should not be changed. FLEXX no longer allows status code case conversion.**		
Fld Length	The length limit of the field.		
Attributes 1 & 1 Flags 1& 2	Any user defined value. Used for user reference only.		

To review the Master Status Detail records press <<Next Form>>.

1.7   Master Status Detail

Description   The Master Status Detail records contain the available values that each status can have. These values are automatically created when the FLEXX system is initially installed. Under no circumstance should any of these values be deleted. It is acceptable to add new values but there will be no underlying code to use them.

Select

→	Master Status Header	→	<<Find>> desired Master Status & <<Next Form>>	→	Master Status Detail

The Master Status Detail appears in Update mode.
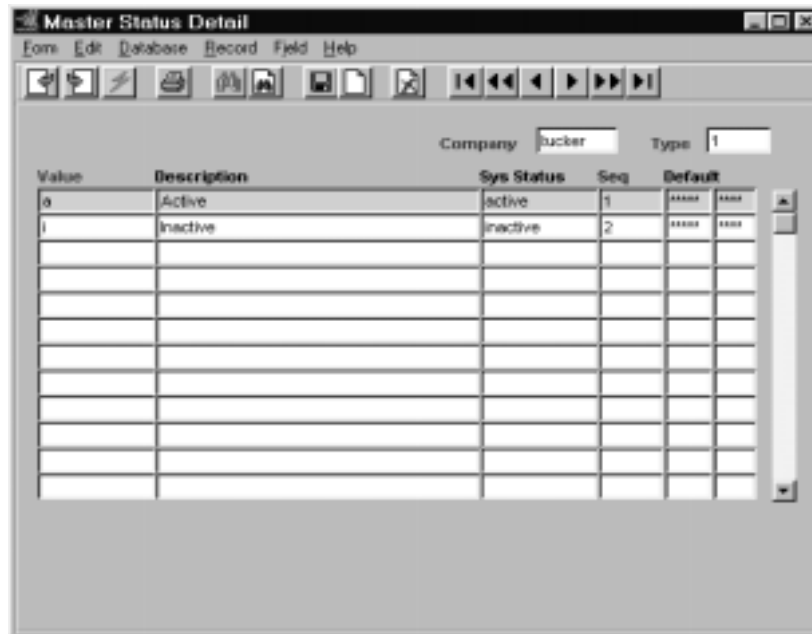
Fields

The following fields appear on the screen.

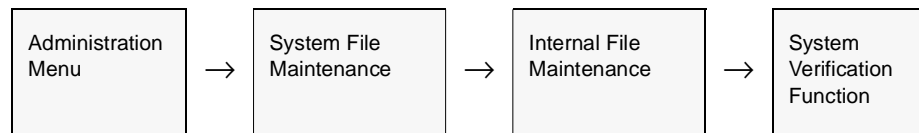| Field	Entry	Default	Reqd
Company	The Company Code of the company employing these values.	Session Default	Y
Type	The Master Status Code used to link the Master Status Header with the appropriate values.	Master Status Header	Y
Values	The values that the Type can process.	System Assigned	Y
Description	A short description of the value.	System Assigned	N
Sys Status	A system status code used internally by FLEXX and should not be adjusting.	System Assigned	Y
Seq	The sequential order in which the Types will appear.	System Assigned	Y
Default	If "Y" then this value will be used as a default value to fields that are defined by this master status.	N	N
Attribute 1 Attribute 2	Attributes defined for the master status detail. The label names are set by master status header attributes.		N
Flag 1 Flag 2	Flags defined for the master status detail. The label names are set by master status header flags.		N

# *1.8*   *System Verification Function*

Description   The System Verification Function verifies that the Next Number *(See Sec. 1.3)*, Master Status *(See Sec. 1.6)* and Master Type *(See Sec. 1.4)* Tables have been correctly set up for each company. The function compares the selected company's tables to those of company "setup". Wherever there are differences the selected company's tables will be updated.

This function should be run after creating a new company to ensure the Next Number, Master Status and Master Type tables have been correctly created.

Select

Administration Menu	→	System File Maintenance	→	Internal File Maintenance	→	System Verification Function

The System Verification Function appears in Update mode.
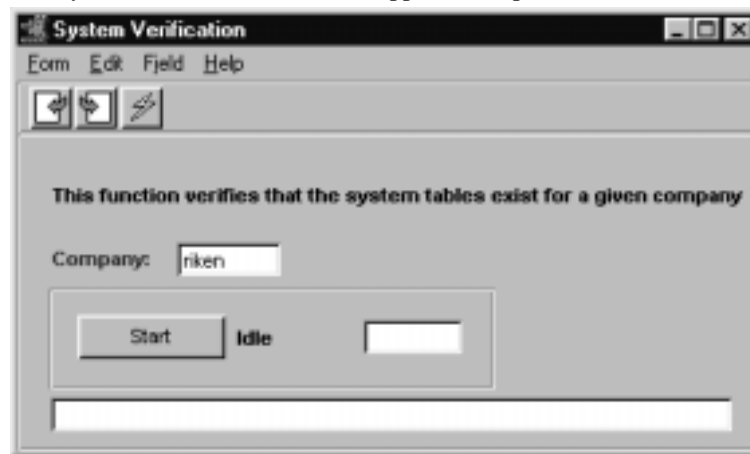
Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company code of the company to be verified. Do not use the wild card option here. This process must be run company by company.		Y
Start	Press the start button to run the process.		

2.0 Report Services/Control

This section describes the forms and routines listed on the Report Services/Control menu.

Select

Main Menu	→	Administration Menu	→	Report Services/ Control
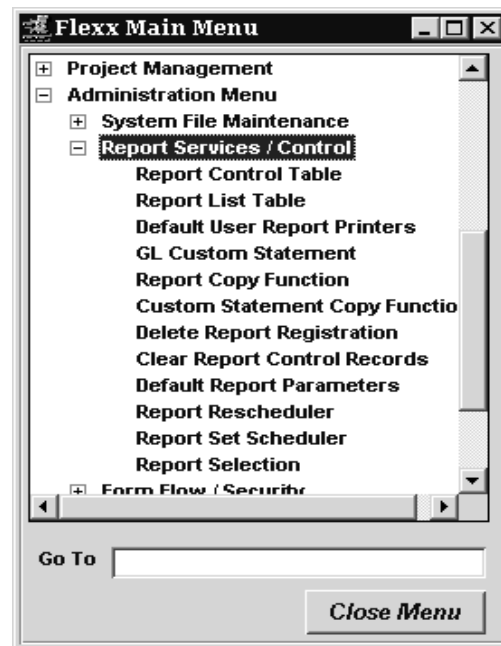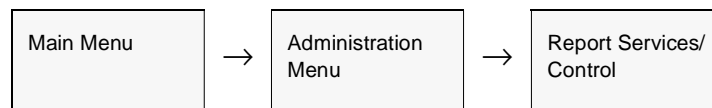
2.1   Report Control Table

Description   The Report Control Table is a log of all the reports that have been run in FLEXX. Each time a report is run it is logged along with other information such as the status of the report, who ran it and the output file name. This is a view only screen and no new information can be added. The log information stored in this table is kept until the Clear Report Control Records function *(See Sec. 2.5)* is run. The Clear Report Control Records should be run on a regular basis to ensure the table does not get too large and thus affect report performance.

Select   .

Main Menu & Administration Menu	→	Report Services/ Control	→	Report Control Table

The Report Control Table appears in FIND mode.

Fields   The following fields appear on the screen.

Field	Entry
Company	The Company code of the company logging the reports.
Report Run #	The Run number of the report that was run.
Report Code	The FLEXX Code of the report that was run.
User Name	Login Name of the user who requested the report to be run.
Scheduled Date Time	The Date and Time the report was scheduled to be run. If the FLEXX Report Server was not used, this value will be the same as the Last Report Run values.
Last Report Run	
Date Time	The Date and Time the report was last run. If the FLEXX Report Server was not used, this value will be the same as the Scheduled value.
Secs	Time in seconds that the report took to run to completion.
Status	The status of a given report request. Status can be;
	• **s** - Setup. A report will have this status during the time an end user is entering the report parameters. Once an end user is finished entering the parameters and selects - RUN - the status will become "r". If an end user just reviews the report parameters of a report and then selects - CANCEL - the log of the report will automatically be deleted.
	• **c** - Complete. Once a report has successfully completed running it will have this status.
	• **r** - Running. A report will have this status during the time the report is actually running. Once it is finished it will have a status of "c".
	• **f** - Failed. If a report fails to run for some reason it will be flagged with this status.
	• **b** - Scheduled: Background Process. Status a report will have when the output request has been sent to the Report Scheduler. A report is sent to the Report Scheduler by selecting the Schedule Report Button on the Report Scheduler form. This assumes that your FLEXX installation uses a dedicated server for print requests. ***(For more information, contact DATABYTE).***
	• **rb** - Running in background. A scheduled report will have this status running the report. Scheduled reports have an initial status of "b", then a status of "rb" and then finally a status of "c" when complete.
	• **h** - Hold Process. Not currently used by FLEXX.
	• **k** - Report Killed. The report was manually terminated (killed) by changing the status to 'k'. This is required to terminate reports that remain in 'b' or 'rb' status and never complete.
	• **to** - Timed Out. A report will have this status when the database has not been updated with a new page number within the allocated time allowed. The allocated time is set using the Application Control Function *(See Sec. 1.1)*.
Priority	The Priority setting at the time the report was scheduled to be run.
Report Title	The report name.
Print	The Print flag setting and printer specified for the report.
# of Copy	The number of copies requested at time the report was scheduled.

Field	Entry
Fax	The Fax flag and Number specified where the report was sent.
Contact	The Contact Name at the Fax number location.
File	The File flag and PAth/name specified where the report was filed.
Mail	The Mail flag and E-Mail address specified where the report was sent.
Attach Report	Attach Report flag setting.
Data Source	This field will show Online Data or Data Warehouse depending on the setting on the Report Scheduler screen.
Schedule	
Type Day of Week Day of Month Expiry Date	The type of schedule used on the Report Scheduler screen.
Report History	Press the Report History button to display the Report Control History form *(See below)*
Report Parameters	Press this button to display the Selection Parameters used at the time the report was selected.

Report Control History

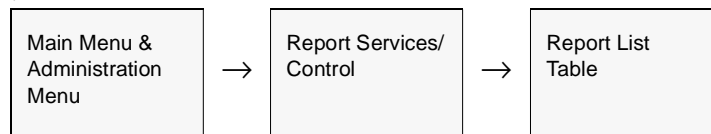The Report Control History screen is view only and no changes or entries can be made.

This form displays the history of the specific report. If the report was not scheduled (only run once), there will only be a single entry matching the Report Control entry. If the report was scheduled to be run more than once, this form will display each event that the report was run.

2.2   Report List Table

Description   The Report List Table is a table of all available reports in FLEXX. It is used to define the general operating parameters of each report. At initial company set up, this table will be empty for the defined company. To generate the table, the Report Copy Function is used to copy all of the standard reports in FLEXX from the "setup" company Report List Table to the company designated *(See Sec. 2.3)*.

Select   .

Main Menu & Administration Menu	→	Report Services/ Control	→	Report List Table

The Report LIst Table appears in update mode.

Report List Table

Form Edit Database Record Field Help

Company `lucker`   Report Code `invform`

Form Name   `acdrvr`
Report Title   `Invoice Form`
Script Dir.   `@ACLENV/rptsr`
SQL tablename   `                `
RPT filename   `invform.rox`
RPT Command   `acrun`
Printer   `default`   Output File `invform.roi`

Report Type   `ar`   **Report Set**   **Priority** `1`
Sub Type   `user`   **Status** `a`   **Text** `N`
Comment   `RPT @DIR/invform.rox -`

Fields

The following fields are displayed.

| Field	Entry	Default	Reqd
Company	The company code the report is defined for. Each company can have its own specific list of reports.		Y
Report Code	The Report Code.		Y
Form Name	The Flexx form used to access the report. This will be "acdrvr" for most reports.		Y
Report Title	The name of the report as it will appear on the Report Selection list. (see sec 2.7)		Y
Script Dir.	The system directory where the report script (program) will be found.		Y
SQL Table Name	This field is only used for non-Actuate reports (no longer supported).		N
RPT File Name	The name of the "rox" file in the above Script Dir. that contains the report.		Y
RPT Command	The FLEXX command that imitates the report. Will normally be "acrun".	acrun	Y
Printer	The printer code to specify the printer to be used when printing the report.	default	Y
Output File	The system file name that will store a copy of the output.		Y
Report Type	The type code assigned to the report.		Y
Report Set	The code to group reports by sets. Used for scheduling reports by sets.		N
Priority	The priority of the report. Used in report scheduling.	1	Y
Sub Type	The subtype code of the report. This code is also used to define report security levels (see sec. 2.8)	user	Y
Status	The Report Status code which can be: • a - available • u - unavailable	a	Y
Text	Any user text can be entered for each report.	N	N
Comment	Additional report comments, used for informational purposes only.		N

Press <<Next Form>> to select the Report List Detail form.

Report List Detail
The Report Selection Parameters are defined on the Report List Detail Table.

Select

Report List Table	→	Press <<Next Form>>	→	Select Report List Detail
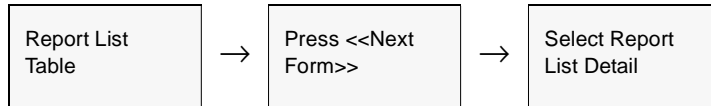
The Report List Detail appears in update mode.
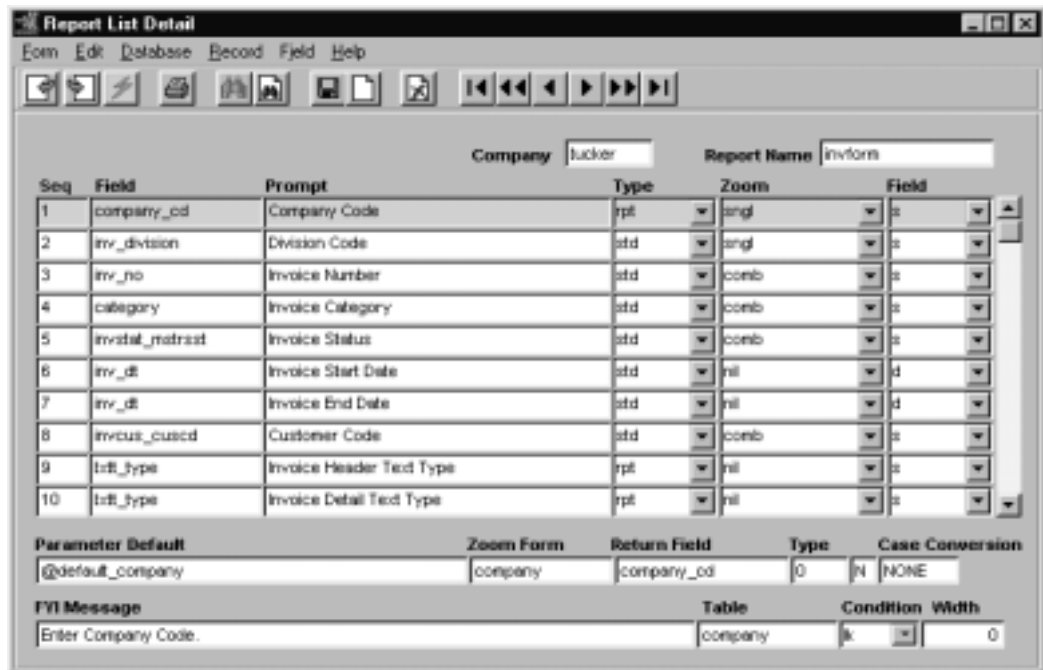
Fields   The individual fields will not be described since the definitions are predefined and should only be changed on recommendation or advice from FLEXX support.

2.3   *Report Copy Function*

Description

The Report Copy Function is used to copy the standard reports in FLEXX from one company to another. At initial FLEXX implementation, it is used to copy all FLEXX reports from the "setup" company Report List Table to the defined company. This function is needed because reports are not automatically created as a result of defining and creating a new company. If you go to the menu option "Report Selection" in any of the FLEXX modules and find that there are no reports defined, then it is necessary to run this function.

Select

Main Menu & Admin Menu	→	Report Services/ Control	→	Report Copy Function
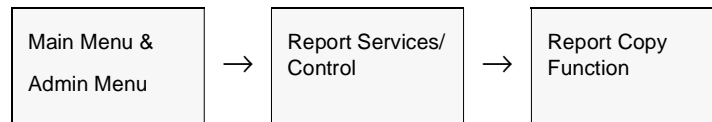
The Report Copy form appears in <<Update>> mode.

Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Copy FROM Company	The company code of the company whose current report set will be used as a template. Typically the company "setup" is used.		Y
Report Code	The report code representing the report to be copied or accept the default wild card to copy over all reports.	%	
Report Type	The report type of the report to be copied or accept the default wild card to copy over all reports. The report type field allows you to copy over the reports for one module at a time, if desired.	%	
Report List Sub Type	The report subtype of the report to be copied or accept the default wild card to copy over all reports. The report sub type allows a further classification to be assigned to reports. Typically all reports in FLEXX are assigned sub type "user".	%	
Copy TO Company	The company code of the company for which the reports will be created. This will be the company code of the newly created company.		Y
Report Code	The report code of the new report to be created if copying a single report or accept the default wild card if copying over multiple reports.	%	
Program	The ACCELL program name. No longer used by FLEXX. Accept the default wild card.	%	
Directory	The directory where the report script will be stored. Not typically adjusted by end users.	%	
Report file	The file where the report script will be stored.	%	
Printer	The name of the default printer used when printing the report. Can be changed at time of printing.	%	
Output File	The file name where the output results will be stored.	%	
Report Type	The report type to be assigned to the copied reports.	%	
Report Title	The name of the report being copied.	%	
Start	Press the button to begin the report copy process.		

Note:

When copying all reports from company "setup" to the defined company, the only feilds required are the From and To company codes. All other fields should be left to be wildcards; when you tab over the fields without making entries, they will be set to %. This will ensure all reports will be copied.

2.4   *Delete Report Registration*

Description   As a result of using the Report Copy Function *(See Sec. 2.3)*, reports are copied and the Report List Table updated with the specifics of each report. If it becomes necessary to delete a report (or reports), this Delete Report Registration procedure can be used. Once the delete procedure has been run, the report(s) and their details in the Report List Table will be deleted.

Select

Main Menu & Administration Menu	→	Report Services/ Control	→	Delete Report Registration
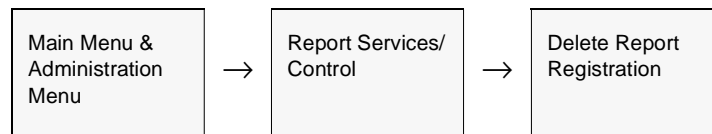
The Delete Report Registration form appears in <<Update>> mode.

Note   You should not delete any reports from Company "setup" since these are the 'Master' report records that are used to build the Report List Table for any future company set up.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Report Company	The company code of the company whose reports will be deleted.	Session Default	Y
Report Code	Enter the report code of the report to be deleted or accept the wild card default to delete all reports.	%	Y
Report Type	The report type of the report to be deleted or accept the wild card default to delete all reports. The report type field allows you to delete the reports by module grouping.	%	Y
Report Set	Reports can be grouped together into sets. If they have been so grouped, the report set definition can also be used as selection criteria to delete the reports belonging to that set or accept the wild card default to delete all reports.	%	Y
Start	Press the button to begin deleting reports.		

Note:

Reports can be deleted by module group using this function. This enables the operator to delete all reports for a specific module that may not have been installed, or if installed, that will not be used. The Report Type field is used for this purpose.

2.5   Clear Report Control Records

Description   The Clear Report Control Records Function is used to clear entries in the Report Control Table *(see Sec. 2.1)*. This function should be performed on a regular basis, depending on the number of reports being printed over a given period, and the capacity of the system data base.

Note that the Report Printing procedure will generate a Report Control Table entry for every report run, whether or not it was successful, and so can have many more entries than the actual number of reports printed.

Select

Main Menu & Administration Menu	→	Report Services/ Control	→	Clear Report Control Records

.
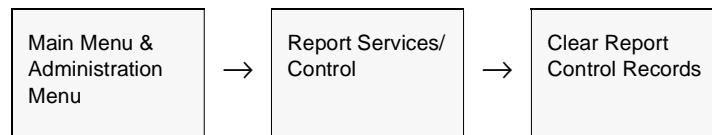
Specify the date up to and including that for which the records are to be purged.

2.6   Report Rescheduler

Description   The Report Rescheduler is used to reschedule the printing of a report that has been run once already. At the initial run procedure where on the Report Scheduler form, the Run Remote function was selected *(see Sec. 2.7)*, FLEXX will prompt "Do you want to run or schedule the report again? Y/N?". If yes is selected, that particular report, including all selected options will be recorded in the Report Rescheduler Table, and can then be rescheduled to be run at some future time/ date.

Select

```
┌──────────────┐     ┌──────────────┐     ┌──────────────┐
│ Main Menu &  │     │ Report       │     │ Report       │
│ Administration│ →  │ Services/    │  →  │ Rescheduler  │
│ Menu         │     │ Control      │     │              │
└──────────────┘     └──────────────┘     └──────────────┘
```
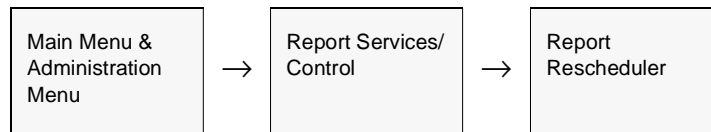
The Report Rescheduler Form appears in Find mode.
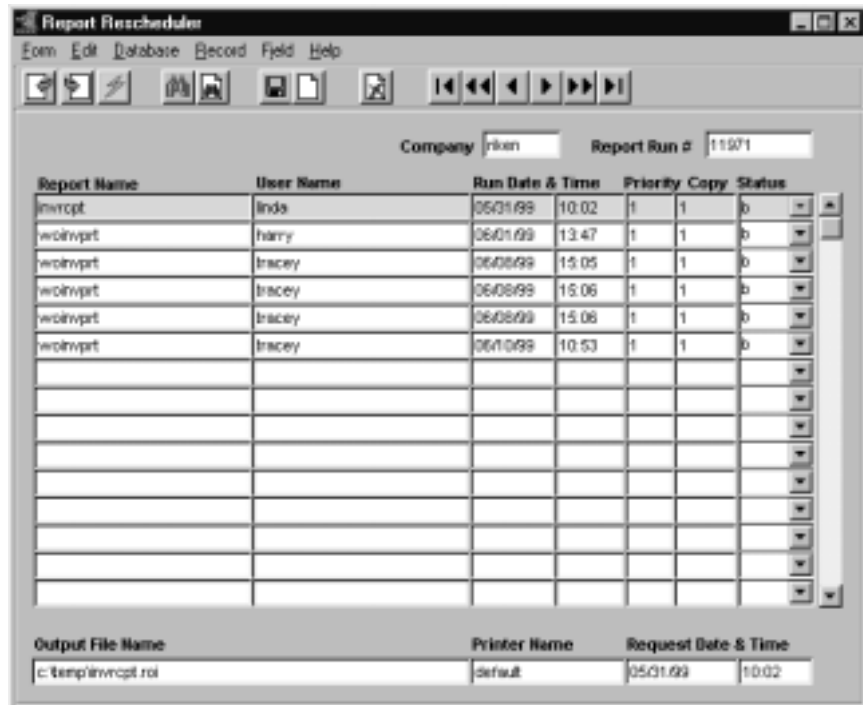
Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The company code to be used for then reports	Session Default	Y
Report Run	The report number as assigned by FLEXX at initial schedule time		Y
Report Name	The FLEXX Report code of the report initially run and rescheduled.		Y
User Name	Name of the user who initially requested the report to be re run.		Y
Run Date & Time	Date and Time report to be scheduled to be re run.	Date/Time of initial run	Y
Priority	Priority if report to be re run	1	
Copy	Number of copies to be printed	1	
Status	Status of report	1	

2.7   Report Selection Function

Description   The Report Selection Function is used to select a specific FLEXX Report to be printed (run). When this function is selected, the Report Select Table is displayed and can be used to select a specific report (do a <<Find>> on a Report Code if known), display a list of reports based on Type and/or Subtype codes, or display all available reports *(See Sec. 2.9 for a listing of all Standard Reports)*

Select

Main Menu & Administration Menu	→	Report Services/ Control	→	Report Selection Press <<Find>	→	Select Report

The Report Select Table appears in Find mode.
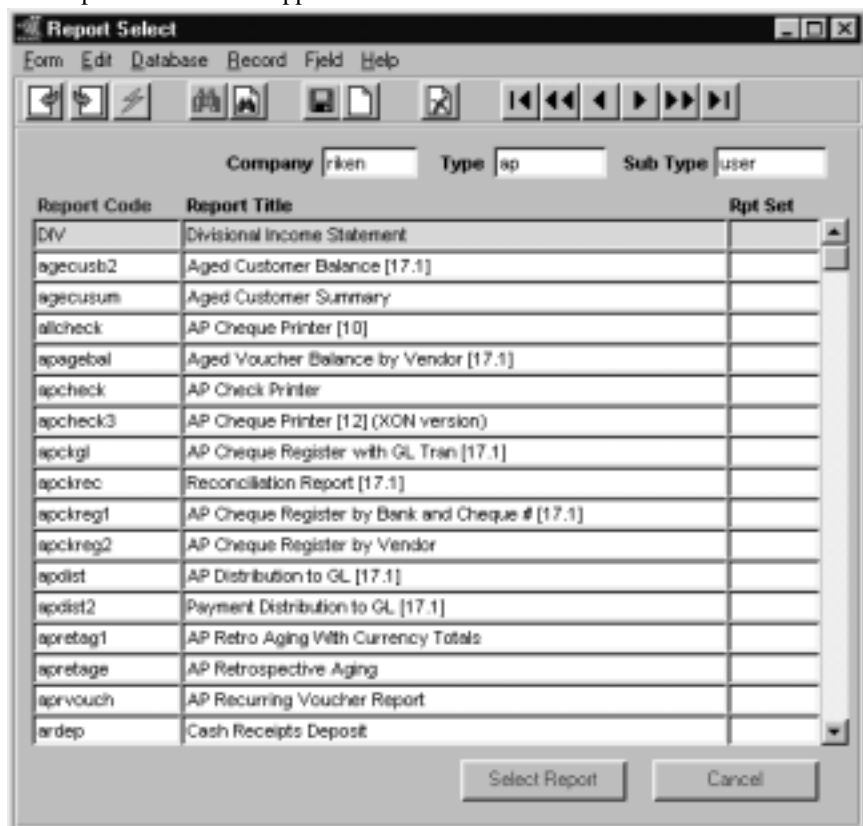
Notes   If Report Security is being used *(as described in Sec. 2.8)*, reports that the user is not authorized to run will not be displayed on the Report Selection Table.

Fields   The following fields appear on the screen.

Field	Description	Default	Reqd
Company	The company code of the company reports are to be run on.	Session default	Y
Type	Type of report (e.g. ar, ap, gl, etc.)		Y
Report Code	FLEXX defined report code		
Report Title	Report description		
Report Set	The set code this report is part of. Reports can be grouped into sets and scheduled to run by sets.		N
Select Report	Press this button to initiate the report generation.		

Procedure   On pressing Select Report, the Report Parameters form is displayed and is used to enter specific selection criteria used by FLEXX to create the report according to desired parameters. Each report will display a different Report Parameters list and allow for different selection parameters *(e.g. Report 'agecusb2' - Aged Customer Balance)*.

Select

Report Select Form → Select a report (i.e. agecusb2). → Press Select Report button → Report Parameters
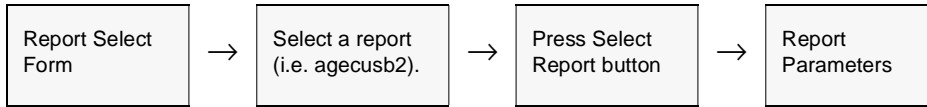
The Report Parameter form appears in update mode.

The Field and Value fields will have values specific to each form, and can be modified as desired. **After each field is modified, the ENTER key <u>MUST</u> be pressed to register that change.** Once all desired changes have been made, <<press Run Report>> to initiate the report generation function.

Note   For date entries, the century cutoff is 30 (i.e. year 3000) and the date range is limited to 100 years.

The Report Scheduler form will be displayed in update mode, and can be modified if desired.
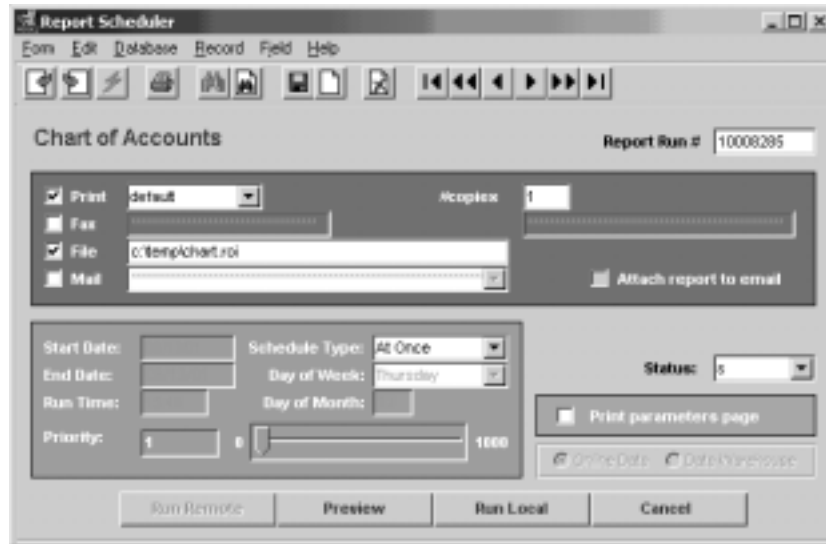
If the FLEXX Report Server is installed, the Report Scheduler form will also have the **Run Remote** button lit.

Please refer to Sec. 2.10 for complete Report Scheduler details.

2.8   *Report Security*

Description

FLEXX makes provision for setting user security on selected reports. Each report that is to be secured is defined with a specific Sub Type code. Then, in conjunction with this, each user that is to have access to such 'secured' reports is assigned a corresponding user Authorization code. Reports that are not to be secure are left to default so that any user is able to run them.

Report Setting

Following is a description of the code settings to 'secure' reports.

Access the Report List Table and FIND the specific report *(See Sec. 2.2)*.

The Sub Type field is used to define the desired security code. Values for this field can be:

Δ   rpt_sec1

Δ   rpt_sec2

Δ   rpt_sec3

Δ   rpt_sec4

Δ   rpt_sec5

Δ   rptcheck

Δ   rptgl

Δ   rptinvoice

Any one of these codes can be used for any report, but it is generally assumed that rptcheck will be used to secure AP Check reports, rptinvoice will be used to secure AR Invoice Reports, rptgl will be used to secure GL Reports, and rpt_sec1 to 5 for any other non-specific reports.

User Settings   Each FLEXX user that is to have access to a 'secure' report will then also need to be authorized. This is done on the User Authorization Entry form as follows.

Access the User Master Table *(See Sec. 3.1)* and FIND the desired user entry.

Press the User Authorization button to display the Authorization screen.

The Authorization screen appears in Update mode.
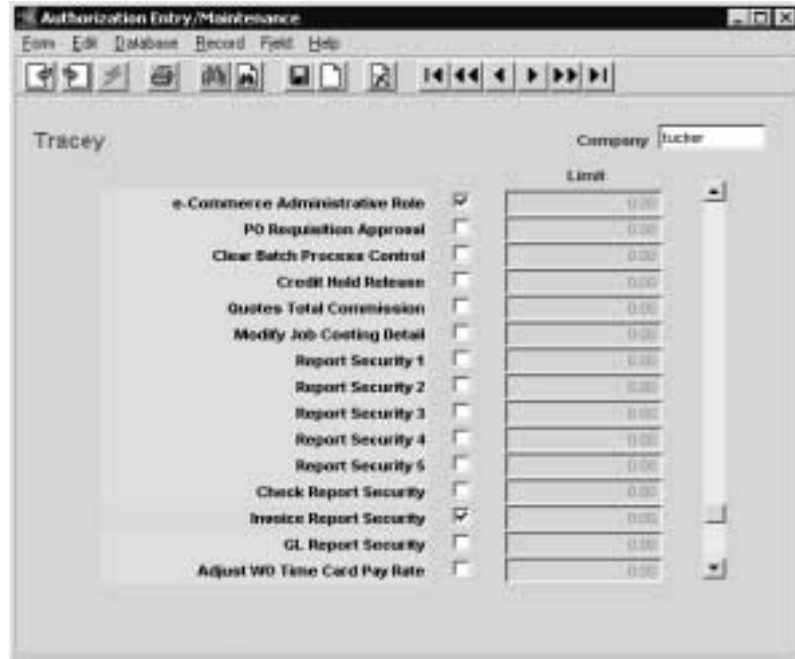
Check the box for the desired Report Security level (e.g. Invoice Report Security). This will then allow this user to run those reports.

Example using the report shown at the start of this section: Report *'invform'* has been defined Sub Type *'rptinvoice'* which corresponds to *'Invoice Report Security'*. User Authorization for this user has been defined with *'Invoice Report Security'*. Only users defined with Authorization level *'Invoice Report Security'* will be able to print report *'invform'*. *Please see Sec. 4.4 for more details on the Authorization form.*

Note: Reports that have not been assigned a specific security code (will default to *user*) can still be run by all users. No user Authorization is required.

2.9   Standard FLEXX Reports

Description   On the following pages are listed all Standard FLEXX reports including a brief description of each.

General Ledger

Report Code	Report Title	Description
budgetc	Print Budget Report	Will print the settings for the specified budget.
bustatus	Business Statistics Report	Prints out in report form the Job Costing Business Statistics screen *(See the Project Management manual, Business Statistics topic)*.
chartc	Chart of Accounts Listing	Provides a list of the accounts set up in the GL. Through the use of status codes, active, summary, no posting or all accounts can be reported.
cusstmt	Custom Statement Listing	Prints out, by statement code, the GL Custom Statement header, detail and account detail for all custom statements.
dtrialbl	Detailed Trial Balance Report	Provides a print out by account (or all accounts) by division for any number of periods. Report will include posted and unposted transactions.
glactc	GL Activity Report	Similar to dtrialbal except displays batch numbers where employed. No beginning or ending balances like dtrialbal.
gljournc	General Journal Report	Report which provides a listing of all transactions, regardless of source (or can specify) by account(s) for periods specified.
gllistc	GL Transaction Listing	Lists each transaction for account specified sorted by transaction number.
glperiod	GL Period Report	Prints the GL Period Table for the period selected.
glrptedtc	Custom Statement Layout Detail	Prints the details of the selected Custom Statement report.
glsourcec	GL Transaction Summarized	Lists all transactions for account specified, by period, sorted first by source then by transaction number.
glstmnt	Various Custom Statements (Portrait)	Selection criteria to produce financial statements in portrait layout (see *7.0 Printing Custom Statements*).
statemnl	Various Custom Statements (Landscape-Legal)	Selection criteria to produce financial statements in landscape layout on legal sized paper. (see *7.0 Printing Custom Statements*).
statemnt	Various Custom Statements (Landscape)	Selection criteria to produce financial statements in landscape layout (see *7.0 Printing Custom Statements*).
trandetc	GL Transaction Composition Report Batch	Produces a report on the makeup of the transaction code selected (orall) regardless of account number.
trialbalc	Trial Balance Summary Report	Summary report showing, for account specified, beginning balance, activity for the period selected and ending balance all on one line.

Accounts Payable

Report Code	Report Title	Description
apagebal	Aged Voucher Balance by Vendor	Provides an aged list by vendor, by voucher # of outstanding payables. No detail included, summary only.
apcheck	AP Cheque Printer	Used to print checks and/or advices from AP. Customized for each client
apckgl	AP Cheque Register with GL Tran	Supplies an AP cheque register with a GL transaction number if the "Generate GL Transactions from AP" has been utilized.
apckrec	Reconciliation Report	Provides a report on the reconciled status of cheques. Will produce an outstanding cheque report.
apckreg1	AP Check Register by Bank & Check #	Provides a cheque register sorted by bank and then by cheque number.
apckreg2	AP Check Register by Vendor	Provides a cheque register by vendor code.
apdist2	Payment Distribution to GL	Report detailing by payment number what was distributed to each GL account by AP.
apdistc	AP Distribution to GL	Report detailing by voucher number what was distributed to each GL account by AP.
apmanage	AP Management Report	A Sumary report of AP activity presented in chart and graph format.
apmetrics	AP Metrics Report	A Sumary report of AP activity by vendor.
apretage	AP Retrospective Aging	Report "rebuilds" the AP subledger listing to agree to the GL AP trade account as of the designated period. Allows choice of reflecting vouchers, denominated in a foreign currency, expressed in home currency using multiple exchange rates - at period end or at transaction date.
apretag1	AP Retrospective Aging with Currency Total	Report similar to above but provides totals for each of the different currencies.
aprvouch	AP Recurring Voucher Report	Prints Details each recurring voucher.
beg1099	1099 Forms Misc.	Supplies paid transaction totals for vendors with a 1099 code of "m" - misc.
landcost	Voucher Landed Cost Report	Report lists Landed Cost vouchers for which the landed cost routine run has not yet been run (e.g. still have Landed Cost flag = 'l').
payhist	Vendor Payment History Report	Lists payments made to specified vendors.
payment	Payment Detail Report	Supplies details by payment number of payments made through AP.
perbal	AP Period Balance	Reports on non paid vouchers by period and displays balance owing for designated period.

Report Code	Report Title	Description
pj	Purchases Journal Report	Provides a report of AP vouchers created from purchase orders.
venlist	Vendor List Report	Provides a vendor listing.
vouglrpt	Voucher Detail Report with GL Transaction	Detailed voucher listing of all vouchers, which includes the GL Transaction Numbers for transactions sent to the GL.
voumark	Marked for Payment Report	Detailed voucher listing of all vouchers with a status of "m" - marked for payment - similar to a pre-check register.

Accounts Receivable

Report Code	Report Title	Description
agecusb2	Aged Customer Balance	Supplies an aged breakdown by customer and by invoice of the balance of the outstanding receivables.
agecusum	Aged Customer Balance Summary	Prints out, by customer, a one line summary of the balance receivable and ages it. No invoice detail shown.
arcusovr	Customer Overdue Report	Report listing all customers with overdue balances, with their current balance.
ardepc	Cash Receipts Deposit	Provides a listing of all receipts and corresponding invoices by customer, by date and by period.
ardistc	AR Distribution for Invoice/Credit Memo	Supplies a report which provides an account analysis. Lists all invoice/credit memos debited/credited to GL account specified.
ardstrct	AR Distribution for Receipts	Supplies a report similar to ardist but for receipts. Provides a detailed report on the application of each receipt to each respective invoice and sorts it by GL account number selected.
armanage	AR Management Report	A Sumary report of AR activity presented in chart and graph format.
armetrics	AR Metrics Report	A Sumary report of AR activity by customer.
arretage	AR Retrospective Aging	Report which recalculates what the outstanding AR transactions were for the selected period. Rolls back any subsequent application of receipts/credit memos etc. Used to agree to period end balance on main AR account in GL.
arsalcus	Salesperson Sales By Customer	Sales Report by salesperson and listed by customer.
artxnhis	AR Transaction History Report	Report that lists all AR transactions by customer and date.
cashrcpt	Unapplied Cash Receipts Distribution Journal	Produces a listing of any receipts with a "u" unapplied status for time period selected.

Report Code	Report Title	Description
commrpt	Commission Report	Sales commission report.
cusbal1	Customer Balance Report	Provides a customer balance listing grouped by Marketing Segment (Class field on Customer Master)
cuslist	Customer List Report	Provides a list of customers complete with address, phone # and salesperson.
cuslistact	Active Customer List	Provides a list of all ACTIVE (status "a") customers.
histd2p	Historical Days to Pay Report	Report shows the historical days to pay value for all selected customers.
invform	Invoice Form	Report used to print invoices. Your company may likely have a customized invoice format that will actually be used to print invoices.
invglrpt	Invoice Report with GL Transaction	Shows full invoice detail, balance due, and GL transaction number of all invoices, regardless of status, sorted by category and customer.
invstmnt	Retrospective Customer Statement	Customer statement report showing all outstanding invoices up to and including period selected.
miscshrc	Miscellaneous Cash Receipts Report	Report lists all miscellaneous cash receipts recorded by date.
recurinv	Recurring Invoice Report	Report lists recurring invoice templates and their details.
staxdue	Sales Tax Due Report	Lists all sales taxes collected by date.
stmntopen	Customer Open Items Statement	Customer statement report showing all outstanding invoices, and also shows the available early-payment discount.

Bank Reconciliation

Report Code	Report Title	Description
reconrpt	Retrospective Bank Reconciliation Report	If the Clear Bank Rec Data routine has not been run, this report can be used to display historical bank reconciliation results.
recoutst	Bank Reconciliation Outstanding Items	Report shows all outstanding items, checks, receipts, etc. that have yet to be reconciled.
recreslt	Bank Reconciliation Results	Report prints out the results of the Bank Reconciliation process. In essence it is a mirror image of the results displayed on the Bank Reconciliation Results form.

Contact Manager

Report Code	Report Title	Description
convprt	Conversations Report	This report contains data pertaining to "entered" conversation with contacts that are recorded; based upon a user defined range.
fouplprt	Follow Up List	Used to print a daily call back sheet. Report provides a list of contacts that need to be called back.
salesprt	Salesperson's Report	Report generates either a detailed or summarized report of a salesperson's activity within a defined period of time.

Inventory Control

Report Code	Report Title	Description
abcclass	ABC Analysis Report	This report provides a print out of all SKU's by their ABC class and the total revenue realized from each sale by order number.
bomveri	BOM Verification Report	Bill of Material definition verification to ensure the defined BOM SKU's are defined with the proper settings.
cntpost	Inventory Stock Count Posting and Audit Report	This report is run as part of the last step of the Inventory Stock Count procedures. It shows all the changes made to the inventory as a result of running the stock count posting routine.
cntsheetc	Inventory Stock Count Sheet	Supplies a form that can be used by stock takers to be used during a physical stock count. Has the option of displaying perpetual quantities if needed.
cntvar	Inventory Stock Count Variance Report	Prints out a comparison by quantity only of the results of a physical inventory count versus the perpetual records.
inadjval	Inventory Adjustment Report-Quantity and Value	Report shows all inventory adjustments for the selected warehouse and date range.
invaluec	Inventory Value and Turns Report	Provides a value and turns report of all on hand inventory SKU's.
invaluecv	Inventory Value and Turns Report by Vendor	Provides a value and turns report of all on hand inventory SKU's. This report groups the inventory by supplying vendor.
invcostc	Inventory Cost Report	Provides an on hand inventory listing by warehouse for each SKU. This on hand inventory amount is then multiplied by the average cost to obtain a total cost per warehouse value.
invdist	Inventory Distribution to GL Report	Report shows all the GL account postings from inventory movment.
invprice	Customer Inventory Price List	Provides a price list of all inventory for specific customers.

Report Code	Report Title	Description
invrcptc	Inventory Receipt Report	Report of inventory received from selected vendors.
invser	Serialize Inventory Report	Provides a print out of the information stored on the SKU Serial Table based on selection criteria used.
invtryc	Inventory Report	Provides a total inventory listing by warehouse for each SKU. The On hand quantity is added to the Quantity on Order, less the Quantity committed to obtain a calculated stock level expressed in units only.
monthadj	Monthly Adjustments Report	Report lists all inventory adjustments made for the selected dates.
multwhsec	Inventory Transaction Report	Shows all the warehouse Inventory activity such as purchases, sales, transfers and BOM builds, etc.
neginv	Negative Inventory Quantity Report	Lists all SKU's that have a negative inventory quantity.
pickbom	BOM Pick List Report	Report displaying the location and number of component SKU's needed to be picked to fulfill the needs of a BOM build request.
poadvice	Purchase Order Advice Report	Report lists all SKU's that need to be ordered, based on the Max and Min settings.
skubom	Bill of Materials	Listing of the parent SKU and its children. No attributes are displayed.
skulisting	Inventory Listing by Category	Listing of all inventory by Category code.
skuprice	SKU Price List Report	Price list report of all SKU's, including such information as effective dates of each price change, preferred customer pricing, etc.
stkorder	Stock Ordering Below Minimum Report	Lists all SKU's that are below minimum inventory levels.
whxfer	Warehouse Transfer Report	Report lists warehouse transfer transactions by date and warehouse selection.

Order Processing

Report Code	Report Title	Description
bilading	Bill of Lading	A Bill of Lading report.
bkorder	Order Report	A report displaying all of the details of each selected order.
cprofile	Customer Profile Report	Report lists customers by Customer Class and their Sales Volumes in that class.
csmetrics	Customer Sales Metrics Report	A summarized customer sales report.

Report Code	Report Title	Description
cuspurch	Customer Purchases by Month	Report listing all purchases by customer and GL Period range.
cuspurchsm	Customer Purchases by Month and Salesperson	Report as above and also sorted by salesperson.
cusrvlvl	Customer Service Level	Report listing the service level of each customer/
invtryvl	Inventory Value and Turns Report	A report showing by SKU the current inventory value, the Month to Date and Year to Date sales and the number of turns on a year to date basis. This information can be shown by individual warehouse or with all warehouses combined.
manifest	Manifest Report	Manifest report showing all shipments for a selected date range; can also be selected by Carrier Code and Warehouse.
opdist	Inventory Movement Distribution to GL	GL Distribution report of inventory movement from sales (normally the COGS and Ineventory GL account distributions).
openord	Open Order Report by Order	Summary report displaying all orders where the status of the order header is open.
ordform	Order Form	A print out of the actual order displaying both header and detail information.
packslip	Packing Slip	A form to be included with the SKU's when they are shipped. Report shows the original customer PO#, the quantity and what was ordered.
pickslip	Picking Slip	A form to be used to select from the warehouse, the SKU's needed to fill an order. Displays location, description and quantity.
rankcus	Customer Sales Ranking Report	Report that lists customers by their MTD and YTD sales, grouped by salesperson code.
rma	RMA Request Form	Report used to print the RMA request when a customer requests to return an item and the RMA function is being used.
rmarpt	RMA Report	Report lists all RMA's according to the selection paramters.
saleprd2	Sales Analysis by Salesperson, Customer and SKU Class Report	Report showing month to date and year to date sales information by salesperson, customer and product class.
saleprd3	Sales by Division and Product Class	Report showing month to date and year to date sales information by division and product class.
salescus	Sales by Customer Classification Report	Report showing month to date and year to date sales information by customer class.
salesperc	Salesperson Sales Report	Detailed sales information by salesperson. Displays sales, margin and margin percentage numbers.
salesprd	Sales by Salesperson and Product Class Report	Report showing month to date and year to date sales information by salesperson and product class.

Report Code	Report Title	Description
ship_labelc	Shipping Labels	A report used to print shipping labels.
venbkord	Back Order Report by Vendor	Report lists all Back Orders and grouped by supplying Vendor code.

Purchase Order .

Report Code	Report Title	Description
openpo	Open Purchase Order	Provides a list, by vendor, of all open purchase orders.
pocash	PO Cash Requirements Report	Specifies cash requirements, using user defined dates, based on the required date as per the PO header record.
poexcept	Purchase Order Exception Report	Report of open PO's that have not been received by the specified Required Date.
poexpedite	Purchase Order Expedite Report	Report of open PO's that have not been received by the specified Promised Date.
poformc	Print Purchase Order	Purchase Order format used to print PO's. Can be selected to print either a single copy format or Multiple copy format where a separate Vendor, Shipper, and Warehouse page are printed.
porpt	Purchase Order Report	Summary report displaying PO total amount, PO status and date required by vendor.
recdpo	Received Purchase Order	Report listing PO's received but not yet vouchered or paid. PO's will be closed but details will be in "r" status.
vensum	Purchases Summary by Vendor	Report summarizes all purchases made from either a selected vendor or all vendors by date range.

Quotation

Report Code	Report Title	Description
quotplt	Price List Quotation	Prints out by quote, the details of each quote with all prices individually listed, which can be sent to the prospective customer for approval.
quotprof	Quotation Status and Profit Report	Report shows the status of quotes and the profitability of each.
quotprt	Print Quotation	Report to print the quote allowing three different formatting layouts.
quotstat	Quotation Win/Loss Report	Report showing the win or loss values of closed quotes.

Repair & Warranty

Report Code	Report Title	Description
rwlabor	Employee Monthly Hours	Report showing number of hours worked by each employee by month.
rworder	Repair & Warranty Order Report	Summarizes the details of each Repair/Time Billing.
rwedit	Repair & Warranty Invoice Edit Report	Acts like a pre-invoice report. Totals parts, labor and applicable taxes to display the complete charge to the customer.

Time Billing

Report Code	Report Title	Description
openwo	Open Work Order Report	Report to list all open work orders. Work orders to be listed can be selected by status code.
perform	Performance Report	Shows performance of all selected Work Orders. Compares estimates against Actual and Billed Amounts
srstatus	Service Request Status Report	Report to list work orders by status in summary.
woedit	Work Order Invoice Report	Acts like a pre-invoice report. Totals parts, labor and applicable taxes to display the complete charge to the customer.
woinvpvi	Work Order Invoice Preview Report	This is a preview of the actual WO invoice and can be used to verify the invoice shows all required data.
wolabor	Work Order Labor Report	Report showing number of hours worked by each employee by month.
woorder	Work Order Detail Report	Shows full Work Order Detail and Labor Records.
woprop	Proposal	Prints a WO Proposal report to be authorized by the customer before work begins. Prints the problem text from the Work Order Text form. Work Order must have a status of "o" - open to be printed. Printing a proposal doesn't update the print status flag on the Work Order Header. **The Proposal report can have additional "conditions" text printed which is defined on the Report List Table Text field for the report using keyword "conditions".**

Project Management

Report Code	Report Title	Description
jcexport	Export Job Costing Records	Job Costing Report (similar to jcrpts) but formatted so it can be exported to an Excel spreadsheet.
jcreview	Job Costing Review Report	A summary report of the Job Costing data entered on the Job Costing Review form.
jcrpts	Job Costing Report	Report that is used to print a detailed summary of the job costing process. This report requires the Job Costing Report Control table to be defined for it to run. The values specified on that table determine the data that will be produced on this report. Then, through the use of the selection parameters, the results can be printed according to those parameters and in a certain order.
openjob	Open Job Report	Report that will list all Open jobs ("a" status). By changing the Status selection parameter, it can also be made to list all jobs that fit that value.

Administration

Report Code	Report Title	Description
rptlistd	Report Parameter Listing	Report lists all the parameters that are defined in the Report List Detail Table for the selected report. This can be used to assist in determining how the selection parameters have been defined as well as show any hidden parameters that you may want to change for some other selection criteria.
rptran	Report Run List by Occurrence	Report shows how many times either selected or all reports have been run. This can be used to determine the popularity of reports.
slowrpt	Report Run List by Processing Time	Report lists all reports that were run during the selected dates and took longer (in minutes) than the specified Run Time parameter value. This is useful in determining which reports take an unusually long time to complete.

2.10   Report Scheduler

Description   The Report Scheduler form is used to enter the specifications for printing FLEXX reports. The particular report to be printed is selected on the Report Select form *(See Sec. 2.7 Report Selection)*. After the report is selected, and the desired parameters have been entered on the Report Parameters form, pressing Run Report will present the **Report Scheduler** form.

Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Print	Select the print box to send the report output to a printer.		Y
Print Device	The printer name. This will be the printer specified as the Default on the User Master for this user.	default	Y
# Copies	Enter the number of copies of the report desired.	1	Y
Fax	Select the Fax box and specify the fax telephone number to fax the report. This functionality only works if fax software has been installed and configured to FLEXX specifications.		Y
File	Select the File box and specify the filename to send the report output to a file; otherwise leave blank. This file can be used to reprint the report at any time.	User Master	Y
Mail	Select the Mail box and specify the e-mail address to have the report server send an e-mail to the user on print completion. This is only functional when reports are being "scheduled".	User Master	N

Field	Entry	Default	Reqd
Attach report to email	Select this box to have the report "rox" file sent to the designated e-mail address as an attachment. If Actuate is loaded the report can then be viewed or printed.		
The following fields are only active if the FLEXX Report Server is installed and active.			
Start Date	The date to start the printing schedule for this report.	Session Default	Y
End Date	The date when the print schedule is to end.	Session Default	Y
Run Time	The time of day when the print schedule is to be started.	Internal Time Clock	Y
Priority	The scheduling priority. Once the report scheduler has determined which reports are eligible to be run for the specified date or time, they are then prioritized with 1000 being the highest and 0 the lowest priority.	1	
Schedule Type	The type of schedule to use; can be: • At Once – to be run immediately. This is the only option for Preview or Run Local. • Run Once – run only once (no repeats). • Daily – run schedule each day for the period entered. • Weekly – run the schedule once a week. • Monthly – run the schedule once a month	At Once	
Day of Week	The day of the week the report is to be scheduled, can be Saturday to Sunday.	Session Default	
Day of Month	The month date the report is to be scheduled. Note that when defining the Day of Week or Day of Month settings, only one or the other can be set. FLEXX will enter the other corresponding value to match.	Session Default	
Status		s	
Print Parameters Page	Select this box to have a cover sheet printed with the report, displaying the selection criteria used to produce the report. This can be controlled with the Application Control variable *parampage* setting.	marked	
Buttons			
Run Remote	Press this button to send the report to the Report Server to be printed. *See Sec. 3.0 for details on using the FLEXX Report Server.*		
Preview	Press this button to preview the report only. It can still be printed from the preview screen but only on the Local printer.		
Run Local	Press this button to print the report on the local printer (i.e. not schedule the printing)		
Cancel	Press Cancel to cancel the operation. This is the same as pressing <<Previous Form>>. It will not cancel printing if the report has already been sent to the printer or scheduler.		

3.0   FLEXX Report Server

Description   The FLEXX Report Server is a standalone FLEXX system that is set up primarily for printing FLEXX reports. It is designed to print reports on a scheduled basis according to a set of parameters defined at the time the report is sent to the FLEXX Report Scheduler *(See Sec. 2.10)*. This will then relieve the local user system of the report processing function and allow the operator to continue with other FLEXX processing while the report is being printed.

Once FLEXX has been installed on the server system and it has been set up as the FLEXX Report Server, the FLEXX Client system will also need to have additional parameters defined. This is to enable the users to submit reports from their local FLEXX systems to the FLEXX Report Server.

FLEXX Set Up   To be able to use the Report Server, FLEXX will need to have the following definitions entered on the Application Control Table and the User Master.

Application Control Table:

Application	Type	Description	Value	Company
all	servername	Report Server system name	no default	default or '**setup**'

The 'servername' variable is used to identify the system name of the FLEXX Report Scheduler to the FLEXX Client system. This can be defined for either the 'setup' company or the default company. If defined for company 'setup', all companies defined to FLEXX will then use this system to schedule reports.

Please refer to the FLEXX Implementation Guide, Sec. 4.0 for more details on the Application Control Table.

User Master:

Each FLEXX user that is to be allowed to submit reports to the server will also need to be defined with specific parameters.

The following definitions will need to be set up:

Δ   Report Server ID - this is the ID assigned to the user to access the report server database.

Δ   Report Server Login Password - this is the Server database password assigned to the user.

Please refer to Sec. 3.1 for more details on defining the User Master table.

4.0 Form Flow/Security

This section describes the forms and functions listed on the Form Flow/Security menu.

Select

Main Menu	$\rightarrow$	Administration Menu	$\rightarrow$	Form Flow/ Security
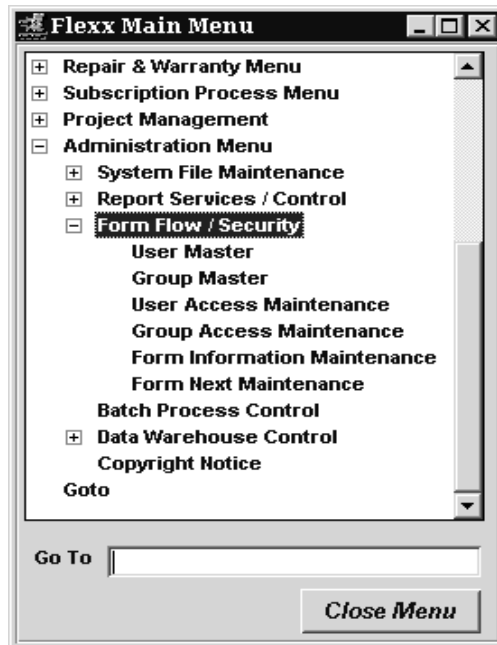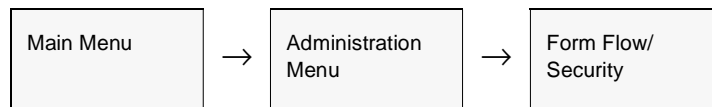
4.1   User Master

Description

The User Master form is used to set up and identify each FLEXX user . When a user logs on to FLEXX, the User Master form is used to set the default values which appear on the Sessions Default (FLEXX Control Panel) screen. Other defaults such as the default printer, output file and e-mail address are also set here.

It is also possible to limit the company and/or division an end user can have access to. With this option the end user has access to only the company and/or division specified on the User Master, or they have full access to all companies and/or divisions.

The e-mail address defined here is used by the FLEXX Report Server to notify the end user that the scheduled report has been completed. This is only used when printing to the Report Scheduler.

If a report server is used to schedule reports, this form is also used to identify the user id and password to the Report Server system.

This form is also used to assign the FLEXX Authorization Password required if the user is defined with any of the authorization levels *(See Sec. 4.4)*. The FLEXX logon password can also be changed on this form, by entering the current password in the Old field and entering any user-desired value in the New and Confirm fields, and Saving the entry *(see Note below)*. If successful, FLEXX will respond with message "Password has been changed". Be aware however, that this will also change the Authorization password to the new value thereby making both passwords the same. Note that to be able to enter the password, the user must be defined in the database as follows:
- Δ   MS/SQL - must be defined as *"sysadmin"* user.
- Δ   Oracle - must be defined to be a *"SECURITY USER"*.

At **initial** setup of the passwords, the three fields are blank. Use *"new"* as the Old password, and the desired logon password in the New and Confirm fields, and then press Save. All three fields will show asterisks.
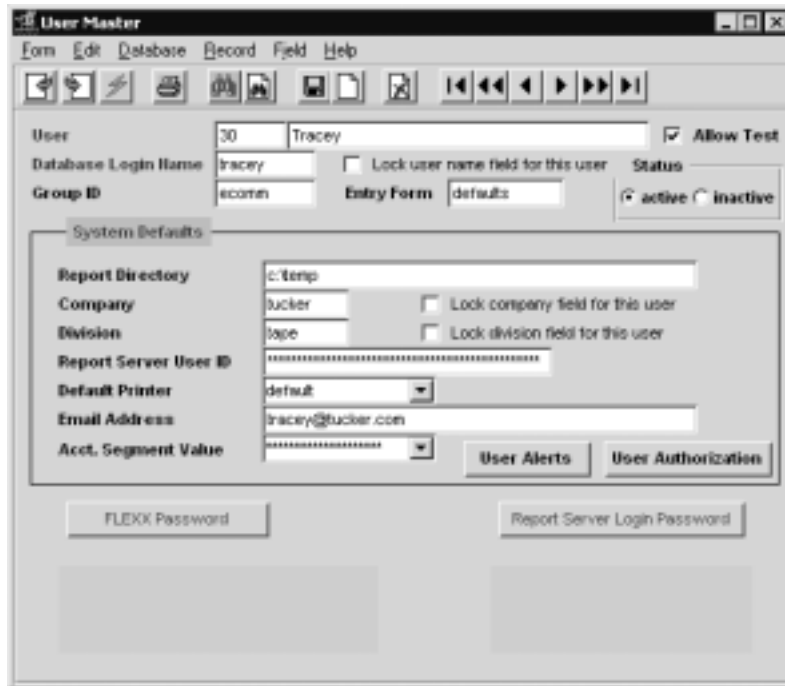
Note: System Administrator

When the user is initially defined to the FLEXX database, set each password to the encrypted format of the word *"new"*, which is "BSDBH7" (uppercase).

Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	User Master

The User Master appears in Update mode. To add new users press <<Clear to Add>>

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
User	The User ID Number. Any numerical value can be used (for Oracle and MS SQL databases). Once assigned, this number must NOT be changed since it is the key that links the user to the authorization and security tables, as well as being the id number stamped on transaction records used to indicate the user that created or modified them.		Y
User Name	The User's Formal Name.		N
Allow Test	Mark this flag if the user is an Administrative user and to allow the user to operate in Test Mode, and has the authority to override the Forms Integrity Control function *(See Sec. 4.10 for more details)*.	OFF	N
Database Login Name	Name assigned to the user by the Database Administrator in the Database Server. This name also serves as a login id when first logging in to the database. The case (upper/lower) must match that of the database login id.		Y
Lock User Name Field	If this box is selected, a user can only view/modify his own transactions (i.e. customers, quotes and sales orders). For this functionality to work, the Database Login Name assigned the salesperson as a user of FLEXX must be the same Database Login Name assigned to him when he is set up as a salesperson in the Salesperson Table.		
Group ID	Group id code for group security level access *(See Sec. 4.6)*.		N

Field	Entry	Default	Reqd
Entry Form	To have a specific FLEXX module (i.e. Accounts Payable) start up each time you log on, enter the name of the module here. i.e. "ap". To have the regular FLEXX menu appear listing all modules, enter "defaults". Specifying one module to start up each time does not prevent access to the regular FLEXX menu if needed. Just "Cancel" the start up module to return to the Session Default screen.	defaults	Y
Status	• active - This user is an active FLEXX user. • inactive - This user is inactive and will be unable to logon to FLEXX.	active	Y
Report Directory	The system Directory where FLEXX will store all reports generated by this user.		Y
Company	The default Company code that will appear on the Sessions Default screen *(See Getting Started Manual)* for the specified user. This is a default value only and can be overridden by the user at the time of logging on to FLEXX.		Y
Lock Company	If this field is selected the end user is limited to the company defined earlier		N
Division	The default Division code that will appear on the Sessions Default screen *(See Getting Started Manual)* for the specified user. This is a default value only and can be overridden by the specified user at time of logging on to FLEXX.		Y
Lock Division	If this field is selected, the end user is limited to the division defined earlier.		N
Report Server User ID	If this user is authorized to use the Report Server to schedule report printing, enter the name that was used to define this user to the Report Server.		N
Default Printer	The default printer for this end user.		N
E-mail Address	The e-mail address of the end user. The FLEXX Report Server will use this address to notify the user that his report has been completed.		N
Acct. Segment Value	This field is not currently used but will implemented in a future FLEXX release.		
Buttons			
User Alerts	Press the User Alerts button to display the Alerts Entry/Maintenance Screen. This form is used to define the Master Table change alerts function *(See Sec. 4.5 for details)*.		
User Authorization	Press the User Authorization button to access the Authorization screen. *Please see Sec. 4.4 for details on defining user authorization levels.*		
FLEXX Password	Press the FLEXX Password button to change the FLEXX passwords, both the login as well as the Authorization password. Old, New and Confirm fields will appear. The Authorization password is used together with the User Authorization codes described in Sec. 4.4. If this is the **initial** setup of the passwords, the three fields are blank. Enter the word *"new"* in the Old field, and the logon password in the New and Confirm fields, and then press Save. All three fields now show asterisks. Should you forget your password, contact your System Administrator who will need to reset the password to *"new"* and then you will again need to enter a password of your choice as described above. **This process results in both passwords being the same value.**		
Report Server Login Password	Press the Report Server Password button to enter or change the user's logon password to the report server system.		

4.2   *User Access Maintenance*

Description   The User Access Maintenance form is used to grant or revoke specific permissions or access to a **specific form** for a **specific user**. Each line (record) on the form affects only one user and one form. All users are granted full access and permissions by default. Any time a form is entered, FLEXX checks to see if that user/form combination exists in the User Access Maintenance table. If an entry is not found FLEXX then checks for any permissions to revoke. If a user does not have "ACCESS" permission to a form, it will not appear on the menu. **A user can still <<ZOOM>> to a form even if access is denied.** If it is desirable to disallow all permissions on a form to a user, all permissions should be revoked including Access.

Note   By default, all users defined to FLEXX will have full access to all forms in FLEXX. The User Access Maintenance form needs to be created for those forms the user is to be restricted from.
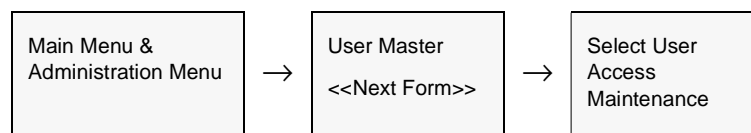
Note   If a form has a subform (e.g. SKU Price is a subform of SKU Master), Inquire permission along with Access must be given on the subform to be able to access the main form. If not given, FLEXX will report message "Cannot use "Next Field" at this time" when the main form is accessed. See the Form Information Maintenance screen *(Sec. 4.8)* for Type "s" forms to identify the subforms.
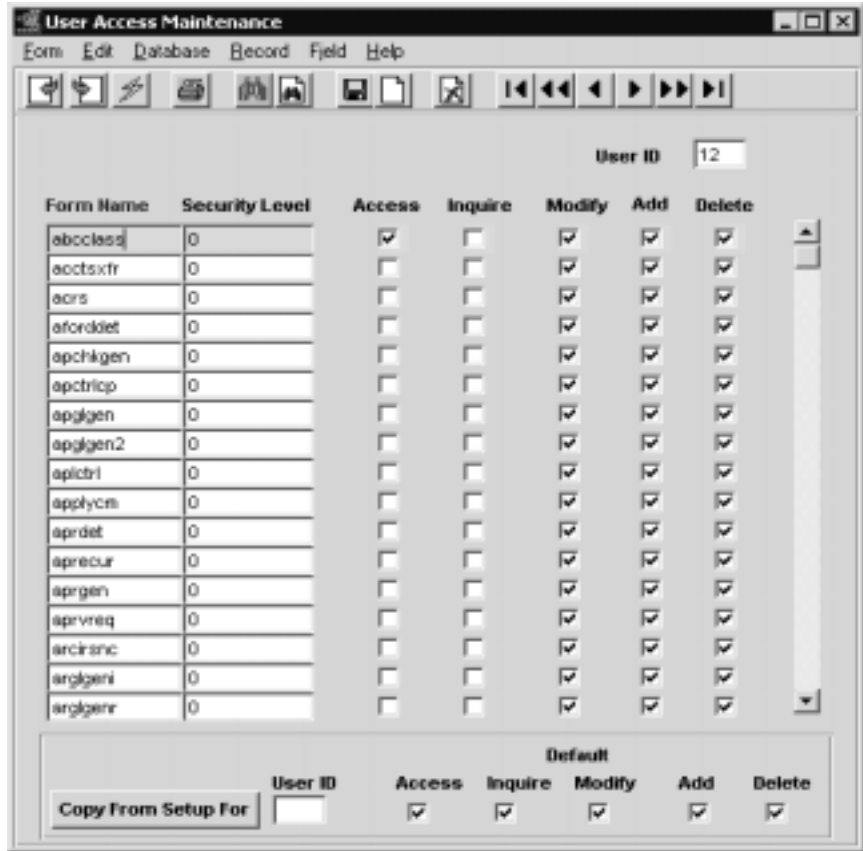
Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	User Access Maintenance

Or

Main Menu & Administration Menu	→	User Master <<Next Form>>	→	Select User Access Maintenance

The User Access Maintenance form appears in FIND mode.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
User ID	The ID assigned to a specific user in the "User Master" form (See Sec. 3.0). This field is Zoomable.		Y
Form Name	Enter the name of the form for which the specific user's permission/access will be modified. For a list of the form names to be found in FLEXX, <<ZOOM>> to the Form Information Maintenance screen and do a <<FIND>>. This form lists each form name, the form heading and what FLEXX module it is associated with.		Y
Security Level	This field is not currently used in FLEXX. For reference purposes only to identify different levels of security.		N
Access	Deselect this box to revoke access to the specified form for this user.	Y	Y

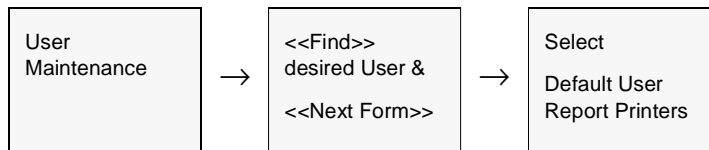| Field	Entry	Default	Reqd
Inquire	Grant/revoke the ability of the user to do a "clear to find" or a "find" on the specified form by deselecting this box. On entry to some forms, users are placed in find mode automatically. This will produce an error if the "INQUIRE" permission is revoked. Click "OK" and press <<Clear to Add>> or exit the form.	Y	Y
Modify	If deselected, after a "Find", the user would not be allowed to modify existing data on the form.	Y	Y
Add	A <<Clear to Add>> would not be allowed if this permission is revoked. The user can view and modify existing data on the form.	Y	Y
Delete	Grant/revoke the user from deleting existing data on the form. The "Delete" function removes the entire record from the database. The user could still modify the data.	Y	Y
Copy From Setup For	Press this button to perform the copy function. This function creates user access records for the User ID specified and with permission or access specified in the default screen. Enter the User ID and mark the required permissions for the user before pressing the button.		

4.3   Default User Report Printers

Description

The Default User Report Printers form is used to specify by user, which printer to use for selected reports. The settings here will override any default printer settings specified on the User Master form *(See Sec. 3.1)* as well as any default printer settings specified on the System Report Registration.

FLEXX default printer priority selection is as follows:

Δ   1. Printer defined on Default User Report Printers form

Δ   2. Printer defined by user on the User Master form *(See Sec4.1)*

Δ   3. Printer defined by group on the Group Master form *(See Sec.4.6)*

Δ   4. Printer defined by report on the Report List Table *(See Sec. 2.2)*

Δ   5. Printer defined as the default system (Windows) Printer.

Select

User Maintenance	→	<<Find>> desired User & <<Next Form>>	→	Select Default User Report Printers

The Default User Report Printers form appears in FIND mode.
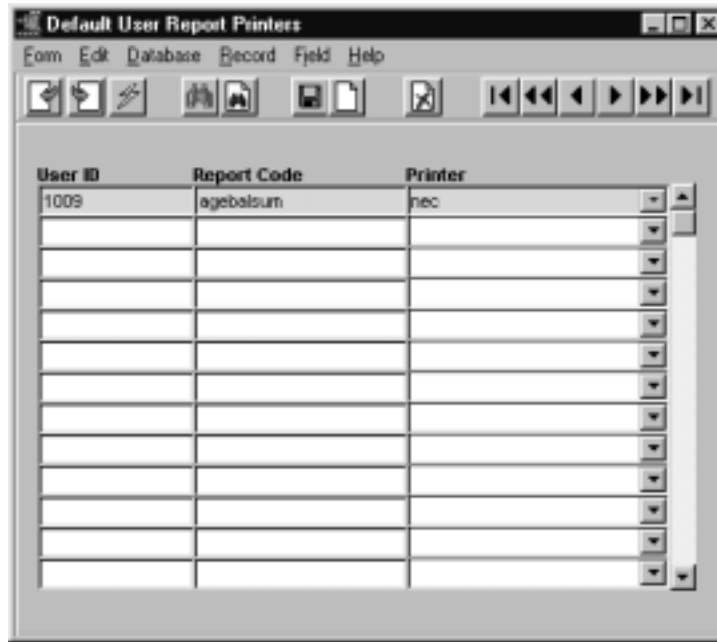
***Fields***   The following fields appear on the screen.

| Field	Entry	Default	Reqd
User ID	The User ID of the person printing the report.		Y
Report Code	The report code of the report to be printed.		Y
Printer	The default printer to be used with the User ID and Report Code combination specified above.		Y

4.4 Authorization Entry/Maintenance

Description

The Authorization Entry/Maintenance form is used to define each user's authority to perform certain FLEXX functions. These are defined as shown in the following screen description

Select

User Maintenance	→	Press User Authorization button	→	Authorization Entry/ Maintenance
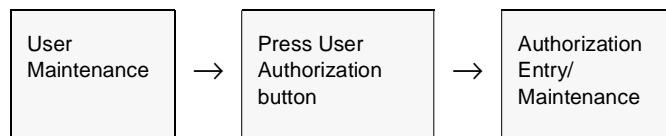
The Authorization Entry/Maintenance form will be displayed as show below.

The Authorization Entry/Maintenance form appears in update mode
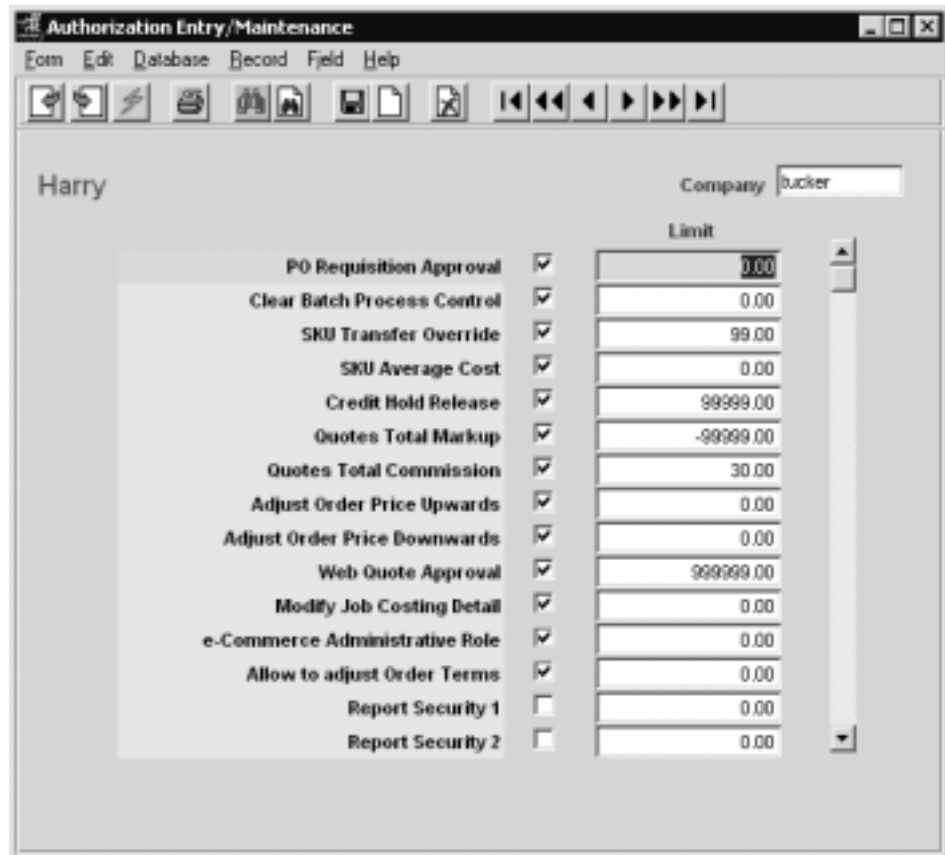
Report Security 3	☐	0.00
Report Security 4	☐	0.00
Report Security 5	☐	0.00
Check Report Security	☐	0.00
Invoice Report Security	☐	0.00
GL Report Security	☐	0.00
Adjust WO Time Card Pay Rate	☐	0.00

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The default Company code of the user.	User Master	Y
User ID	The user ID of the person whose authorities are being set.	User Master	Y

All available Authorization levels are listed with a check box allowing it be selected. The Limit field will either have a real value (either dollar or percentage) or 0.00 if the selection is a Yes/No only.

Level Description	Limit
• **PO Requisition Approval**. Gives the user the authority to approve PO requisitions up to the dollar value specified in the Limit field. This is also used in FLEXX Accounts Payable. If Application Control has been set so that entry of AP voucher items are checked against a predetermined budget *(apbudval = Y)*, FLEXX will check this setting if any approvals are needed. Approval would be needed where the budget is being exceeded. FLEXX will also compare the amount by which the budget is being exceeded against the dollar value specified in the Limit field.	$ value
• **Clear Batch Process Control.** Allow the user to clear the Batch Process Control Log of process control records.	0.00
• **SKU Transfer Override.** In FLEXX Order Processing, transfer orders can be created which may then need to be authorized. Only end users assigned this level can authorize Transfer Orders.	0.00
• **SKU Average Cost.** This level allows the user to see the SKU Cost fields on the SKU Master in Inventory Control. The Average Cost and Standard Cost are displayed on the main SKU Master form, and the individual warehouse costs for each SKU are shown on the SKU Inventory form. These fields will only be visible if the user has been defined with this level.	0.00

• **Credit Hold Release.** Authorization to release Credit Hold up to the dollar value specified in the limit field for the following transactions:
 	
   Δ   Sales orders in OP
 	
   Δ   Credit memos in AR
	$ value

• **Quotes Total Markup.** Authorization to approve quotes if markup is less than minimum gross margin as defined in Application Control Table. Value is defined as a percentage in the limit field.	% value
• **Quotes Total Commission.** Authorization to override the sales commission value if it is greater than defined on the Application Control table. Value is defined as a percentage in the limit field.	% value
• **Adjust Order Price Upwards.** The authority to increase the SKU selling price on a sales order in OP.	0.00
• **Adjust Order Price Downwards.** The authority to lower (decrease) the SKU selling price on a sales order in OP.	0.00
• **Web Quote Approval.** Authorization to approve eCommerce sales orders via the FLEXX eCommerce function The value is defined as a dollar value in the Limit field.	$ value

Field	Entry	Default	Reqd
Level Description		**Limit**	
• **Modify Job Costing Detail.** Allow the user to modify system generated Job Costing Detail entries *(See the Project Management manual for more details).*		0.00	
• **eCommere Administrative Role.** Authorize the user to be able to access the FLEXX eCommerce Administration Tools screens.		0.00	
• Allow to adjust Order Terms**.** Authorize the user to be able to change the terms settings on both the Order header (in OP) and the Quote header (in Quotation Mgt.)		0.00	
• **Report Security 1 to 5** - Generic report security levels. This enables the Report Security function of FLEXX where a user can be either restricted or permitted to print certain reports. *(See Sec. 2.8 for more details on Report Security)* **(See Sec. 2.8 for more details on Report Security)**		0.00	
• **Invoice Report Security.** Authorization to run reports with 'rptinvoice' security setting.		0.00	
• **GL Report Security.** Authorization to run reports with 'rptgl' security setting.		0.00	
• **Check Report Security.** Authorization to run reports with 'rptcheck' security setting.		0.00	
• **Adjust WO Time Card Pay Rate.** Authorization to be able to change the Pay Rate on the WO Time Card in Time Billing.		0.00	

Note:

Each user that is to be "authorized" for the above functions will also need to have an Authorization Password. This is created on the User Master form using the User Password button *(Please see Sec. 4.1 above).*

At **initial** setup of the passwords, the three fields are blank. Use *"new"* as the Old password, and the desired logon password in the New and Confirm fields, and then press Save. All three fields will show asterisks.

Note: System Administrator

When the user is initially defined to the FLEXX database, set each password to the encrypted format of the word *"new"*, which is "BSDBH7" (uppercase).

4.5 Alerts Entry/Maintenance Screen

Description

The Alerts Entry/Maintenance screen is used to define the Master Table Change Alerts function. This function enables an alert to be sent to specific FLEXX users when changes are made to the following FLEXX Master Tables:
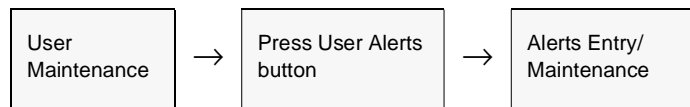
- Δ Customer Master
- Δ Vendor Master
- Δ SKU Master

The table is set up by user. Each FLEXX user who is to receive alerts can be set up according to which Master Table is changed, and then which specific fields of that table are affected. The alert is sent via an email message to that user's defined email address, indicating all changes made to each Master Table. Each FLEXX user who is to receive change alerts will need to have this table defined.

Note:

It is very important that the field names to be monitered are entered **exactly** as they are used in FLEXX. To get the correct name and its spelling, use <<Help/About Form>> on the selected field.

Select

User Maintenance	→	Press User Alerts button	→	Alerts Entry/ Maintenance

---

The Alerts Entry/Maintenance form appears in update mode.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Company	The Company code of the user.	User Master	Y
Alert Type	The type of alert to send; currently only email is used.	email	Y
User ID	The FLEXX user ID to receive the alerts.	User Master	Y
Alert Function	The various tables that can be used to send alerts. Each function listed in the dropdown list represents a specific FLEXX table.		Y
Alert For New/ Change	Either one or both boxes can be selected to generate alerts; • New - send an alert if a new entry is made; • Change - send an alert if the table and field is changed.		Y
Status	The status of the alert entry; can be: • active; • inactive	active	Y

Field	Entry	Default	Reqd
Alert Fields	Used to select all the specific table fields to trigger alerts. Entries are separated by a ";" (semi-colon) and a ";" is also required at the end. **These field names must be entered exactly as they are known in the FLEXX program.** To get the exact name, open that form (e.g. Customer Master), select that field and click <<Help / About Form>>. The field name will be in the Current Field Information field. All fields on any of the selected tables can be used.		Y
Email Address	the specific user's email address.	User Master	Y

Multiple entries for the same table can be defined for a specific user. This can be useful if alerts are to be sent to more than one email address for that user.

If it is required that more than one user be alerted when changes are made to a specific table, each user to receive the alert needs to be defined with the affected table and its fields. Additionally, each user can be defined so their alert is triggered by different fields being changed.

Warning: *Be aware that if a field name is entered incorrectly or misspelled, FLEXX will report an error message referring only to the* table *in error. This will occur on a change made to any of the table fields, not just one of the defined fields. So ensure the field names are entered exactly as they are in FLEXX, and if an error is reported when a field is being changed, review all entries in the Alerts Entry/ Maintenance Screen for that table* (for all users and functions).

4.6   Group Master

Description   The Group Master form is used to set up and identify groups of users in FLEXX. Groups are useful in setting up user security where there are a large number of users. One or more groups can be set up, group access can be defined for each and then have his access rights customized for him through the use of the User Access Maintenance form. Any access settings defined at the user level will override any group settings.

Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	Group Master
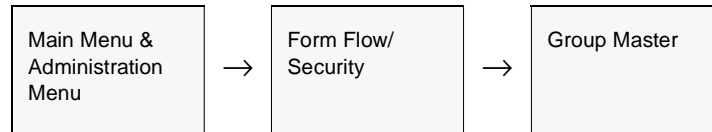
The Group Master appears in Update mode. To add new groups press <<Clear to Add>>
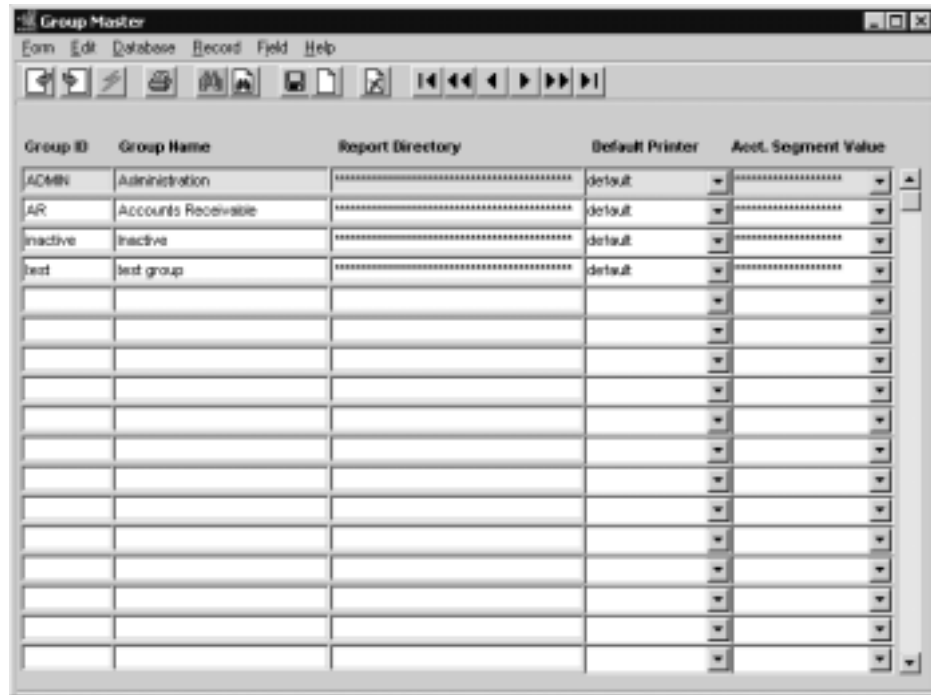
Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Group ID	End user defined ID code to identify the group.		Y
Group Name	The Group's formal name.		N
Report Directory	The directory to be used to store report output.		N
Default Printer	The printer to be used to print output specified by the group. Overridden by printers designated on the User Report Printers and User Master forms.		
Acct. Segment Value	This field is not currently used but will implemented in a future FLEXX release.		

4.7   *Group Access Maintenance*

Description   The Group Access Maintenance form is used to grant or revoke specific permissions or access to a specific form for a specific 'user group'. All groups are by default granted full access and permissions to all forms in FLEXX. Any time a form is accessed, FLEXX will check the group access first to see permissions exist for that group for that form. If an entry is not found, FLEXX allows full access/permissions. If an entry is found, FLEXX then checks for any permissions to revoke. If a group does not have "ACCESS" permission to a form, it will not appear on the menu. A group user can still <<ZOOM>> to a form even if access is denied. If it is desirable to disallow all permissions on a form to a group user, all permissions should be revoked as well as access.
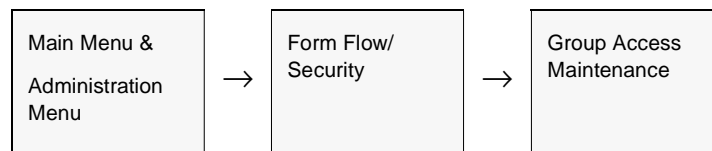
Notes   A user can be assigned to a group to have access permissions set at the group level. Should a user have additional access rights over and above those of the group, these can be defined on the User Access form *(Sec. 3.2)*. Any permissions set up at the user level override those set at the group level.
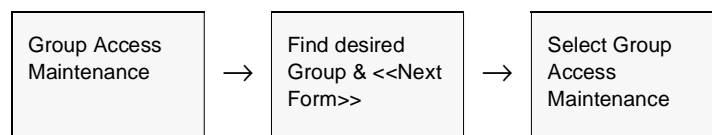
Note   If a form has a subform (e.g. SKU Price is a subform of SKU Master), Inquire permission must be given on the subform to be able to access the main form. If not given, FLEXX will report message "Cannot use "Next Field" at this time" when the main form is accessed. See the Form Information Maintenance screen for Type "s" forms to identify the subforms.

Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	Group Access Maintenance

Or

Group Access Maintenance	→	Find desired Group & <<Next Form>>	→	Select Group Access Maintenance

---
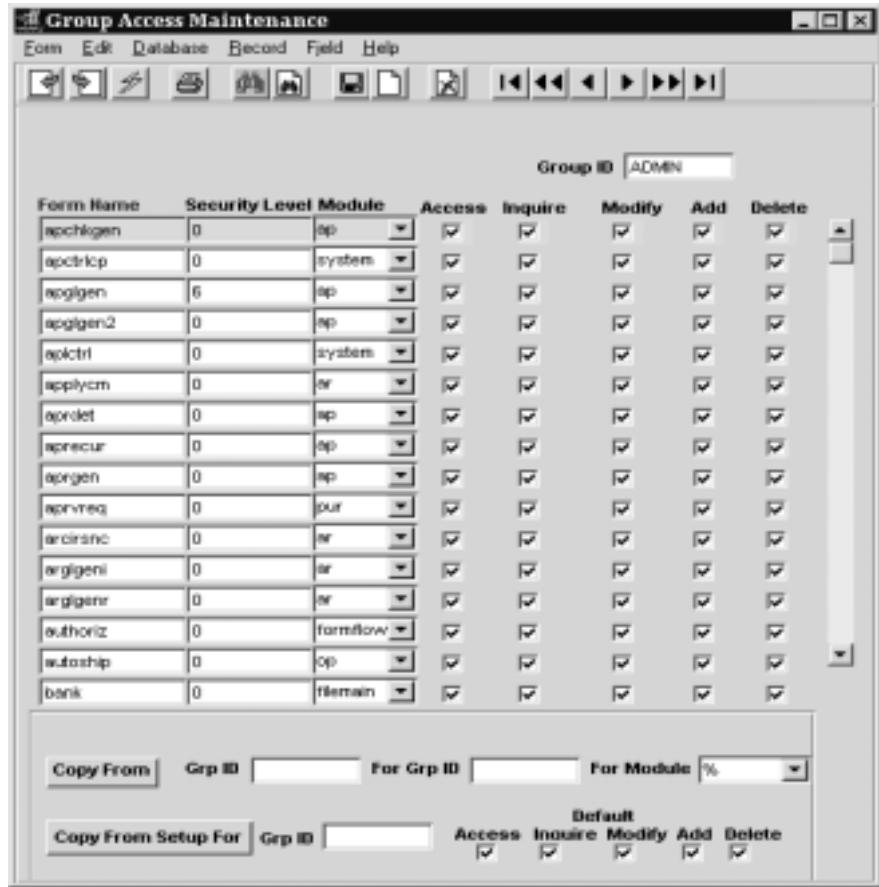
The Group Access Maintenance form appears in FIND mode.

Fields   The following fields appear on the form.

Field	Entry	Default	Reqd
Group ID	The ID assigned to a specific group in the "Group Master" form. *(See Sec. 4.6).*		Y
Form Name	Enter the name of the form for which the specific Group's permission/access will be modified. For a list of the form names to be found in FLEXX, <<ZOOM>> to the Form Information Maintenance screen and do a <<FIND>>. This form lists each form name, the form heading and what FLEXX module it is associated with.		Y
Security Level	This field is used in the **Copy From** function when copying the Group definitions from one group to another. Specify any desired value from 0 to 9 to identify the different levels for the entries. The copy can then be performed by Level selection.	0	N
Module	This field identifies the FLEXX module the displayed form is located in. This value can also be used in the Copy From function to select the copy by module.		Y

Field	Entry	Default	Reqd
Access	Deselect this box to disallow the specified user from accessing the specified form from a menu.	Y	Y
Inquire	Grant/revoke the ability of the user to do a "clear to find" or a "find" on the specified form by deselecting this box. On entry to some forms, users are placed in find mode automatically. This will produce an error if the "INQUIRE" permission is revoked. Click "OK" and press <<Clear to Add>> or exit the form.	Y	Y
Modify	If deselected, after a "Find", the user would not be allowed to modify existing data on the form. The user could view data or add data, only.	Y	Y
Add	A <<Clear to Add>> would not be allowed if this permission is revoked. The user can still view and modify existing data on the form.	Y	Y
Delete	Grant/revoke the user from deleting existing data on the form. The "Delete" function removes the entire record from the database. The user could still modify the data.	Y	Y
Copy From Grp ID For GRP ID For Module	Use this function to copy the settings of an already defined Group to another group's access table. *See Notes below for more detail.* Enter the group code of the "From" group to be used. Enter the "To" group code. Enter the module code if the copy is to use only the forms for those modules. Press the **Copy From** button to perform the copy.		
Copy From **Setup For** Grp ID	Press this button to create Group access records for the Grp ID specified and with the permissions specified in the Default fields.		

Notes: Copy From Grp ID

It is possible to copy the settings of an already defined Group's security to another group's access table. This can be done selectively by Module (e.g. ar, ap, etc.) and by Security Level using this **Copy from Grp ID** process. This is accomplished using the following procedure:

Δ   Press <<Clear to Add>>,

Δ   specify the group id in the 'Copy From' Grp ID field (e.g. ADMIN),

Δ   specify the 'To' group id in the For Grp ID field,

Δ   select the For Module code if only the forms for a certain module are to be copied,

Δ   Press the Copy From button.

FLEXX will copy all forms to the "For" group that are defined on the "From" group at a Security Level setting either the same or higher. This means that if the "For" group already has security levels assigned at a certain level, say for a different module, and the copy is performed, only those forms will be overlaid on the "For" table that are at a lower security level. Changes can then be made as required to individual entries. Enter the changes to the required fields for each selected detail line and press <<Add/Update>> to save the entry.
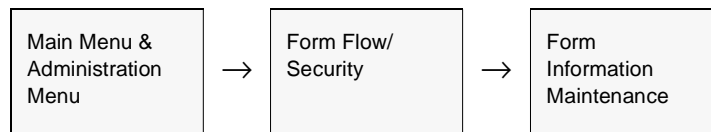
4.8   *Form Information Maintenance*

Description

The Form Information Maintenance table contains the names (codes) of all of the forms in FLEXX. All form names are registered in the database so there may be form names of modules listed that are not installed as part of your FLEXX package. This form can be used to view all forms by module, as well as in conjunction with User and Group Access *(See Secs. 4.2, 4.7)* to control access to forms.

Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	Form Information Maintenance

The Form Information Maintenance form appears in FIND mode. To see a listing of all forms in FLEXX, do a <<FIND>>.

Form Name	On	Form Heading	Module	Fcn	Type		Security				Version No.
abcclass	+	ABC Classification	ic	*	t		0	6	4	4	1
acctsxfr	+	Generate Recon records from Accounting	recon	*	t		0	6	4	4	1
acrs	+	Depreciation Percentage Table	fa	*	t		0	6	4	4	1
aforddet	-	To Update BOM	op	*	t		0	6	4	4	1
apchkgen	+	AP Payment Generation	ap	*	t		0	6	4	4	1
apctrlcp	+	Application Control Copy	system	*	t		0	6	4	4	1
apglgen	+	Generate GL Transactions(Voucher)	ap	*	t		0	6	4	4	2
apglgen2	+	Generate GL Transaction(Payment)	ap	*	t		0	6	4	4	1
aplctrl	+	Application Control	system	*	t		0	6	4	4	1
applycm	+	Apply Credit Memo/Invoice	ar	*	t		0	6	4	4	1
aprdet	+	A/P Recurring Entries Detail	ap	*	t		0	6	4	4	1
aprecur	+	A/P Recurring Entries Header	ap	*	t		0	6	4	4	1
aprgen	+	A/P Recurring Entries Generation	ap	*	t		0	6	4	4	1
aprvreq	+	Approve PO Requisition	pur	*	t		0	6	4	4	1
arcirsnc	+	AR Days To Pay Resyncronization	ar	*	t		0	6	4	4	1
arglgeni	+	GL Transaction Generation From Invoice	ar	*	t		0	6	4	4	3
arglgenr	+	GL Transaction Generation From Receipt	ar	*	t		0	6	4	4	3

Fields   The following fields appear on the screen.

Field	Entry	Default	Reqd
Form Name	The code for the Form Name. This is the same code that appears as the Current Form Information Name when a Help - About Form operation is performed on the form *(See FLEXX - Users' Guide - Help).*	System Generated	Y
On	There are four options available here as follows • **"+"** the form will appear on the menu listings and can be accessed through the use of the GO TO function. • **"-"** the form will not appear on the menu listings and can not be accessed through the use of the GO TO function. If the GO TO is attempted the following error message will appear - "Invalid entry - form name not found". If an attempt is made to <<ZOOM>> to the form, the form will appear with the following error message "Form not found in security definition table - Access Denied". When "Okay" is pressed, the form is removed. • **"n"** the form will not appear on the menu listings and can not be accessed through the use of the GO TO function. If the GO TO is attempted, the following error message will appear - "Invalid entry - form name not found". If an attempt is made to <<ZOOM>> to the form, the form will appear with the following error message "Operation not allowed on the form". When "OKAY" is pressed, the form remains but no operations can be performed. The advantage of the "n" setting versus the "-" setting, is the fact the "n" is overridden by User or Group Access as the "-" setting is not. • ****** null value, FLEXX allows access to the form only by menu selection and by <<Zooming>>. No access can be gained by using the GO TO function.	+	Y
Form Heading	The formal Form Name and generally the name that appears on the menu listings.		
Module	The FLEXX module that uses of the form. This field can be used to do <<Find>> to see all of the forms used by a specific module.		
Fcn	Not currently used by FLEXX.	*	
Type	There are two kinds of forms in FLEXX. A form can be: • **"f"** - form. These are the actual forms that provide the functionality of the application. • **"m"** - menu. These are menu forms.		Y
Security	Not currently used by FLEXX, but should always be set to "0" (zero).		Y
Version No.	The version number of the currently installed form. This is used with the Form Integrity Control function to ensure the forms being used are for the current version of FLEXX *(See Sec. 4.10).*		Y

Note   Changes or deletions should only be made to this table on advice from FLEXX Support. Uncontrolled changes could result in FLEXX failing to perform as expected.

4.9   *Form Next Maintenance*

Description

The Form Next Maintenance table is used like a road map to instruct FLEXX what forms *(as registered in Form Information Maintenance - Sec. 4.8)* appear as subforms of others. It is a mechanism to order forms in relationship with one another as well as which forms appear in menus and in what order.

Select

Main Menu & Administration Menu	→	Form Flow/ Security	→	Form Next Maintenance

The Form Next Maintenance form appears in FIND mode. To see a listing of all form next relationships, do a <<FIND>>.

Form Name	Off	Next Form	Type	Sequence	Security	Level
mainar	+	cussum	1	1	0	6
mainar	+	invage	1	2	0	6
mainar	+	invoice	1	3	0	1
mainar	+	receipt	1	4	0	1
mainar	+	argigeni	1	5	0	1
mainar	+	argigenr	1	6	0	1
mainar	+	misccash	1	50	0	1
mainar	+	recurinv	1	60	0	1
mainar	+	rcinvgen	1	61	0	1
mainar	+	menuara	1	70	0	1
mainar	+	rptsel	1	88	0	6

The above display shows all forms that part of the "mainar" form, which is the Accounts Receivable Menu.

Fields

The following fields appear on the screen.

Field	Entry	Default	Reqd
Form Name	The name of the form to serve as the "header" or "main" form of the subsequently defined next or "sub" forms. For example, the form "voucher" has several sub forms that can be selected when the <<Next Form>> command is chosen. So the form "voucher" would be entered here.		Y
Off	There are two options available here as follows: • "+" If the "+" option is selected the form designated in the Next Form field will be accessible from the form designated in the Form Name field when the <<Next Form >> icon is selected. • "-" If the "-" option is selected, the form designated in the Next Form field will not be accessible from the form designated in the Form Name field when the <<Next Form>> icon is selected.		Y
Next Form	The name of the form to appear as a Next Form to the form designated in the Form Name field. Continuing with the example, "voucher" would appear in the Form Name field and form "rscuvo3" (Voucher Detail (Non-Inventory)) could appear here. So if you select Voucher Entry and <<Next Form>> the Voucher Detail (Non-Inventory) form will appear.		Y
Type	The type "1" option indicates to FLEXX that the form designated in the Next Form field will automatically appear as a Next Form from the form specified in the Form Name field when the <<Next Form>> icon is selected. There is no other coding needed. Any other type option i.e. 2,3,etc. can be defined but for them to be utilized additional coding is needed. End-users should have no need to modify existing type 2, 3, etc. To add new functionality please contact FLEXX Support.	1	Y
Sequence	The number sequence reflecting the order the Next forms will appear on the menu.		Y
Security	Not currently used by FLEXX. Normally set to 0 (zero).	0	Y
Level	Used internally by FLEXX. Do not change the settings unless advised by Databyte.	1	Y

4.10   Form Integrity Control

Description   FLEXX has been enhanced to provide a facility whereby the versions of each of the system forms (screens) can be controlled. This control is designed to ensure that the form to be displayed is either at the current or a newer than current version of FLEXX, and so ensure the latest version of the programming function is employed. If it isn't, FLEXX will display a message informing the operator of the discrepancy, and will not allow the operator to proceed before the condition is resolved. *Please refer to the FLEXX Implementation Guide for more details.*

This function is under the control of the **Allow Test** definition setting on the User Master form.

The normal FLEXX user will be defined with the flag set OFF. All users need to be individually defined. This will then prevent those users from accessing any forms that are not current.

The administrative user(s) would be defined with the flag set ON. This gives that user override status over the version control and so be able to access those forms that are not at the current version.

With **Allow Test** set ON and this user is logged on to FLEXX, the FLEXX Control Panel will show the additional **Activate Test Mode** field *(shown below)*. Note that this field is not displayed on the Control Panel for the user not having the **Allow Test** flag set.

This flag enables the user (most likely the FLEXX administrator) to control whether or not to allow accessing 'old' version forms and functions, and also to test the new versions prior to requiring all users to use the forms. This is designed so the unsupported function can be performed by at least one user, but only in Test mode, and thereby possibly completing the process until the form level discrepancy has been corrected.

When this flag is set ON, the Control Panel will indicate the user is operating in Test Mode as follows:

Δ   The words **Test Mode** will be shown in red;

Δ   The FLEXX Information Bar will be shown in red.

5.0   Batch Process Control

Description   The Batch Process Control Table is a log of all FLEXX batch processes (e.g. AR Invoice Generation, AP Payment Generation, all GL Transaction Generations, etc.) that have been run either from the time of FLEXX installation or since the last time the table was cleared. Each entry also records additional information on each process such as the status of the process, the user who requested the process and the date and time it was initiated. Batch Processes are those functions that require the 'Start' button to be pressed and perform a FLEXX process rather than updating a form.

Select

Main Menu &	→	Administration Menu	→	Batch Process Control

The Batch Process Control Table appears in UPDATE mode.

Fields

The following fields appear on the screen:

Field	Entry	Default	Reqd
Proc ID	The ID number of the process.	System Generated	Y
Name	Process name		Y
Client	Name of Client machine		N
Status	• c - Completed. Batch process has successfully completed running. • r - Running. Process has not yet completed, either successfully or in error. • f - Forced. Process has been manually forced to completion. • e - Error. Process has completed but in error. • a - Aborted. Process was aborted before completion. • x - Rejected due to conflict. There was a processing conflict between some of the parameters.		
User ID	ID of User that initiated process	System Generated	Y
User Name	FLEXX User name as defined in User Master	System Generated	
Date Started	The date the process was started.	System Generated	Y
Time (not titled)	Time the process was started.	System Generated	Y
Buttons			
OK	Exit the form.		
>>More	Go to next form to review additional details of process.		
Force	Will only be active on 'r' status entries. Press this button to Force the selected process to completion ('f' status).		
Clear to	Used to clear the table up to (not including) the date specified; will only clear completed (non-'r') records. This button is only active for users with *'clearproc'* Authorization *(see Sec. 4.4 for information on setting Authorization levels)*.		

Note: Clear To process

The *Clear To* process clears the table up to the specified date and should be performed regularly since the table can grow to the point of adversely affecting system performance. Additionally, any processes that are left in 'r' (Running) status, implying they never completed, should be 'Forced' to completion ('f' status), or they will not be cleared from the table.

Pressing >>More will display the following form:

Button	Action
OK	Exit this form.
<<Done	Return to previous form.

Process Parameters are used in debugging process failures and will only be necessary when requested by FLEXX support personnel.

6.0   FLEXX Data Warehousing

Description   FLEXX Data Warehousing is a function supplied as a separate module whereby transactional FLEXX data tables can be warehoused. This allows historical data to be removed from the "On-Line" production database thereby improving data throughput and system performance. THe data is archived in an "off-line" (warehouse) database and can be accessed with all FLEXX functionality.

The following tables can be warehoused, and are selected by module function as required:

OP (Order Processing):
- Δ   Order Header (job)
- Δ   Order Detail (jobdet)
- Δ   Shipment (shipment)
- Δ   Ship Repack (ship_repack)

AR (Accounts Receivable)
- Δ   Invoice Header (invoice)
- Δ   Invoice Detail (invdet)

AP (Accounts Payable)
- Δ   PO Header (po)
- Δ   Voucher Header (voucher)
- Δ   PO/Voucher Detail (povoudet)
- Δ   Payment Header (payment)
- Δ   Payment Detail (pmtdet)

Application Control   Data Warehousing is enabled by making the following entry in the Application Control Table.

Application	Type	Description	Value	Company
warehous	install	Data Warehouse is installed	Y	**setup**

Note: This definition is for Company "setup" so will affect all companies defined in FLEXX.

6.1   *Operating Procedures*

The Data Warehouse process consists of the following procedures:

1. Transferring data from eleven FLEXX tables to the Warehouse database, and

2. Purging the transferred data from the On-Line database.

There are two methods for performing the Data Warehouse function.

1. Running a set of stored SQL procedures;

     - this is the recommended method, and would be performed by the system Database Administrator (Dba).

2. Running FLEXX processes;

     - this is an acceptable method, and would be performed by a FLEXX user who has *"flexxadm"* database Permission set.

Each method will be described in detail.

Executing SQL Procedures   **Data Transfer Function**

When using SQL to perform the warehousing function, the system Dba would run the following eleven stored procedures, one for each FLEXX table to be warehoused:
- Δ   wu_job
- Δ   wu_jobdet
- Δ   wu_shipment
- Δ   wu_ship_repack
- Δ   wu_invoice
- Δ   wu_invdet
- Δ   wu_po
- Δ   wu_voucher
- Δ   wu_povoudet
- Δ   wu_payment
- Δ   wu_pmtdet

These procedures are run manually by the Dba running as the Database Owner.

These procedures must be run when no other users are accessing the database, so it is required that all other FLEXX users be logged off FLEXX at this time.

These procedures will COPY all records from the 'on-line' (production) tables to the warehoused tables.

The warehousing tables are named:
- Δ   wh_job
- Δ   wh_jobdet
- Δ   wh_shipment
- Δ   wh_ship_repack
- Δ   wh_invoice
- Δ   wh_invdet
- Δ   wh_po
- Δ   wh_voucher
- Δ   wh_povoudet
- Δ   wh_payment
- Δ   wh_pmtdet

For example, all records in table 'job' (Order Header) that are not already in the 'wh_job' table will be transferred. Previously transferred records that have since been updated in 'job' will also be updated in 'wh_job'

Previously transferred records that have been deleted from the 'on-line' table will be deleted in the 'warehoused' table. These deleted records are kept track of in the following tables:
- Δ   dr_job
- Δ   dr_jobdet
- Δ   dr_shipment
- Δ   dr_ship_repack
- Δ   dr_invoice
- Δ   dr_invdet
- Δ   dr_po
- Δ   dr_voucher
- Δ   dr_povoudet
- Δ   dr_payment
- Δ   dr_pmtdet

This means that there will be records that exist in both tables.

Data Purge Function
Periodically, the warehoused (transferred) records will be purged. The Data is purged by running the following three stored procedures, one for each warehoused module:

- Δ   wp_job - purges job, jobdet, shipment and ship_repack; where:
    - Δ   orders are Invoiced, Closed, Cancelled, or Received; and
    - Δ   order details are Invoiced, Cancelled, or Received; and
    - Δ   shipments are Invoiced or Received.

∆   wp_invoice - purges invoice and invdet, where:
  ∆   invoices are Posted, Paid, and Printed, and
  ∆   any attached Credit Memos and Receipts are Applied and Posted.

∆   wp_voucher - purges po, voucher, povoudet, payment and pmtdet, where:
  ∆   PO's are received and Paid (status "p"), or Cancelled,
  ∆   vouchers are fully Paid, or Voided, and Posted, and
  ∆   any attached Payments are Printed or Voided, and Posted, and
  Reconciled.

These procedures are run manually by the Dba running as the Database Owner.

These procedures must be run when no other users are accessing the database.

These procedures will purge all records that have been added or modified before the cutoff date, which is the current date minus the number of days specified in the application control "warehous" variable as shown below:

| Application	Type	Description	Value	Company	Parameter
warehous	purgedelay	Delay until records are purged	14	**setup**	job
warehous	purgedelay	Delay until records are purged	14	**setup**	invoice
warehous	purgedelay	Delay until records are purged	14	**setup**	voucher

Note that the Purge Delay value is specified for each purge procedure. Again, these are defined for company "setup" so will affect all companies defined to FLEXX.

Also note that the Parameter value needs to be specified; **invoice** for procedure wp_invoice, **job** for wp_job, and **voucher** for wp_voucher.

Running FLEXX Processes

There is also a facility to run these procedures from Flexx, although this is not recommended.

From the Administration Menu, select Data Warehouse Control.
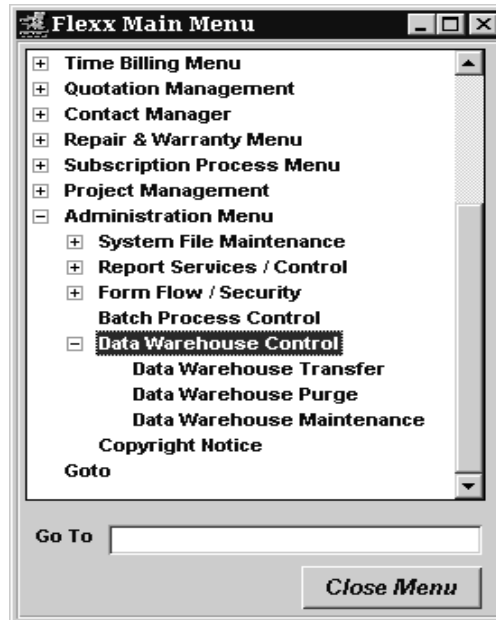
The tables and procedures found under this menu can only be run by someone who has been set up on the database as a member of group *"flexxadm"*. If the user does not have *"flexxadm"* permission, FLEXX will report error message "Data Warehouse Transfer failed".
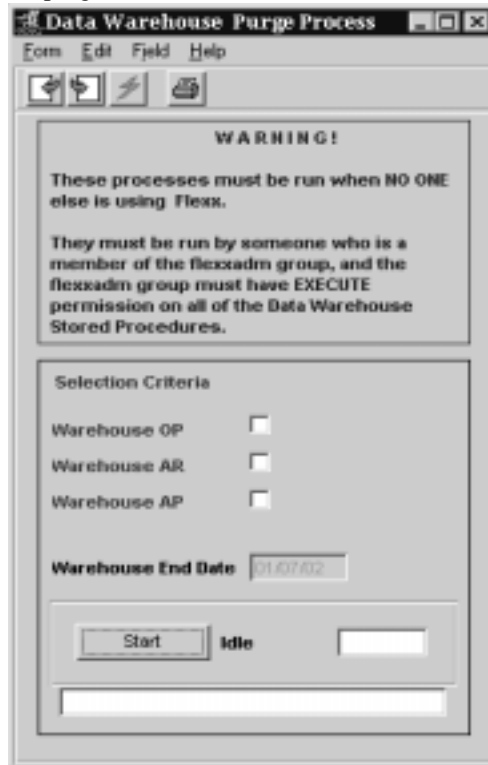
Data Warehouse
Transfer

Data can be warehoused by selecting Data Warehouse Transfer.
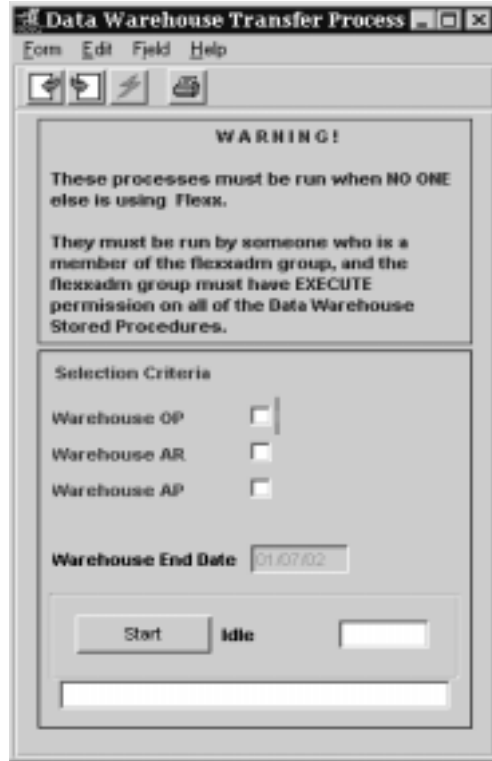
This function simply calls the eleven SQL warehouse transfer procedures and can
be selected by module for the tables to be transferred.

Data Warehouse Purge

To purge records, select Data Warehouse Purge.

Data Warehouse Purge Process

Form Edit Field Help

WARNING!

These processes must be run when NO ONE else is using Flexx.

They must be run by someone who is a member of the flexxadm group, and the flexxadm group must have EXECUTE permission on all of the Data Warehouse Stored Procedures.

Selection Criteria

Warehouse OP ☐

Warehouse AR ☐

Warehouse AP ☐

Warehouse End Date 01/07/02

Start | **Idle**

This function simply calls the three SQL warehouse purge procedures and can also be selected by module for the tables to be purged. Please see the description under Data Purge Function for more details.

Data Warehouse
Maintenance

To review warehouse procedure runs, either through Flexx or run manually, select Data Warehouse Maintenance.

This screen shows the run time and status of all warehousing stored procedures. Status codes can be:

- • a - Process aborted
- • c - Process completed
- • e - Error in processing
- • f - Manually forced completed
- • r - Process running
- • x - Rejected due to conflict.

This screen can also be used to clear old transaction records. Select the line to be cleared and press the Delete icon. It is recommended that this table be periodically cleared. This can be accomplished by deleting transaction entries individually from this form, or by executing a SQL command to delete the table as desired.
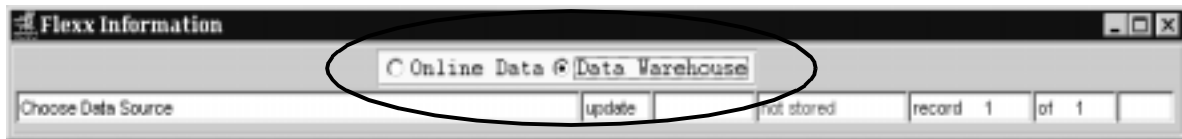
6.2   Accessing Warehoused Data

Description   **FLEXX Forms**

When using Flexx, the forms (screens) that have the eleven data warehousing tables as their target tables can be accessed either in 'on-line' mode or 'warehoused' mode.

This can be done by toggling the Data Selector on the FLEXX Information Bar before displaying that particular form.

Printing Reports

To run reports against the warehoused data, the choice can be made on the Report Scheduler form. Click the Data Warehouse button before pressing one of the buttons (Preview, Run Local, or Schedule) to run the report.
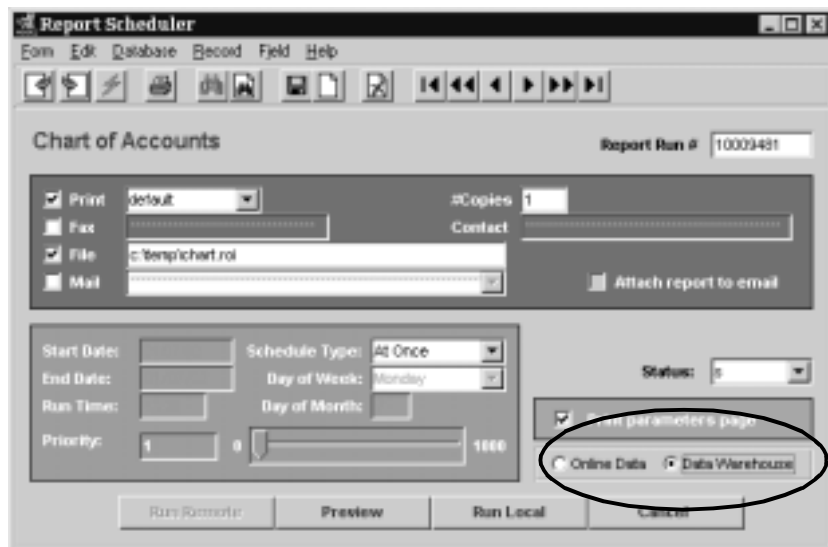
6.3   *System Administrator Information*

For MS/SQL and Oracle database clients, the following permissions must be given:

   Δ   GRANT ALL ON TABLE_NAME FOR   *flexxgrp*;

   Δ   GRANT ALL ON TABLE_NAME FOR   *flexxadm*;

This must be GRANTed for all eleven warehouseable TABLE_NAME entries:
   Δ   job,
   Δ   jobdet,
   Δ   shipment,
   Δ   ship_repack,
   Δ   invoice,
   Δ   invdet,
   Δ   po,
   Δ   voucher,
   Δ   povoudet,
   Δ   payment,
   Δ   pmtdet.

For Oracle clients, the following additional permissions must be given:

GRANT SELECT ON WAREHOUSE_TABLE FOR USER_NAME;

This must be GRANTed for all users who have access to data warehoused tables, and for all eleven WAREHOUSE_TABLE entries:
   Δ   wh_job,
   Δ   wh_jobdet,
   Δ   wh_shipment,
   Δ   wh_ship_repack,
   Δ   wh_invoice,
   Δ   wh_invdet,
   Δ   wh_po,
   Δ   wh_voucher,
   Δ   wh_povoudet,
   Δ   wh_payment,
   Δ   wh_pmtdet.

7.0   Appendix A

Application Control Table

The Application Control Table is used to define variable parameters to customize FLEXX to fit company specific needs.

Following FLEXX installation and set up, the Application Control Table for your company will be empty, and if not defined, FLEXX will use the default values specified either in the 'setup' company or FLEXX program code. To customize it for your company, you can use the Application Control Copy Function (*See Sec. 1.2*) to copy the default values from 'setup' company, and then modify, add and delete variables as required. Be aware that the 'setup' company table will not contain all possible required values and so defining additional parameters to your company Application Control table will very likely be required. *See Sec. 1.1 for a general introduction to the table.*

Please refer to the FLEXX Implementation Guide, Topic "Application Control Table" for a detailed description of all Application Control parameter settings and their meanings.