Menu Maintenance

Contents

1 Menu Maintenance

1.1 INTRODUCTION

The Warehouse Management System is delivered as a suite of programs, not all of which will be used by every client they are supplied to. Menu Maintenance allows the super users of the client to add only those programs appropriate to their operation to the menu structure. Additionally, new programs may periodically be supplied to clients and these will need to be added to the menus.

This document covers the maintenance function for making additional programs available for use and for adding them to the menu system.

The document also covers the creation and/or amendment of the menu structure.

LAYOUT OF USER GUIDE

The user guide is laid out according to the logical progression of activities required to add new functionality to menus, create new menus and/or make amendments to existing menus.

1.2 OVERVIEW

The process of menu maintenance consists of the following stages:

- Ensure that the program to be added to the menus will be recognised by the system by making sure that the program is listed in the Menu Screens program, which lists all the available programs. If it is not already on this list then it may be added.
- A new menu may be created in the Menu Options screen; or, an existing menu can be located and changes made.
- Once a new menu has been created it will be necessary to add it to one of the existing menus on WMS. WMS will be supplied to clients with at least one menu item from which the client can build their own menu structure.

Menu options are associated with a security level, which is compared with the security levels associated with User Names, and can be used to restrict the access of menu options to certain users.

1.3 MENU MAINTENANCE

1.3.1 Menu Screens - FXMSCR

This screen contains all the programs that will be available to use from WMS. If a program is not listed on this screen then it will not be possible to add it to the menus.

The screen does not necessarily contain every program that is supplied with WMS but rather those that are pertinent to the operation needs of each client. Therefore, this screen may also be used to make additional programs available; they may be new programs or existing programs containing functionality not previously required.

Ready for **What's Next, Now**™

Field Name	Description	Options	Values
Name	The program name (as appears in the top right-hand corner of the screen)	n/a	A valid program.
Description	The descriptive name of the program	n/a	User Definable
Sec. Level	The security level to be applied to this program	0 - 9	0 is low; 9 is high
Passing Common Value	The Passing Value used by the screen control when accessing this program	Common, Value or blank selected from a drop-down list	User Definable

1.3.1.1 Tab Pages

This button provides access to a sub-screen where the security levels for screens that contain a number of tab pages can be maintained.

For example, Owner Maintenance, pictured below, has a number of tabs, each of which may have a different security level to the others.

Ready for **What's Next, Now**™

Using the Tab Pages button from the Menu Screens program it is possible to assign a security level that is different from the overall security of the screen. For example, the Charging tab page may have a higher security because it contains cost details.

The Tab Pages screen, see below, can be used to maintain the security details for the Charging tab page.
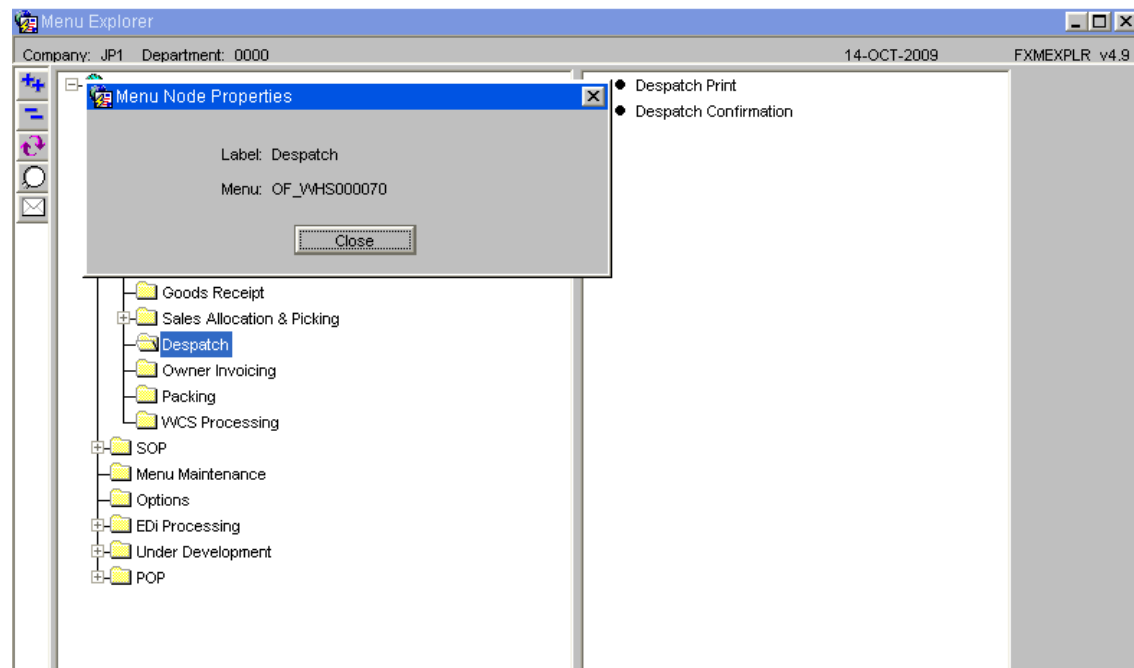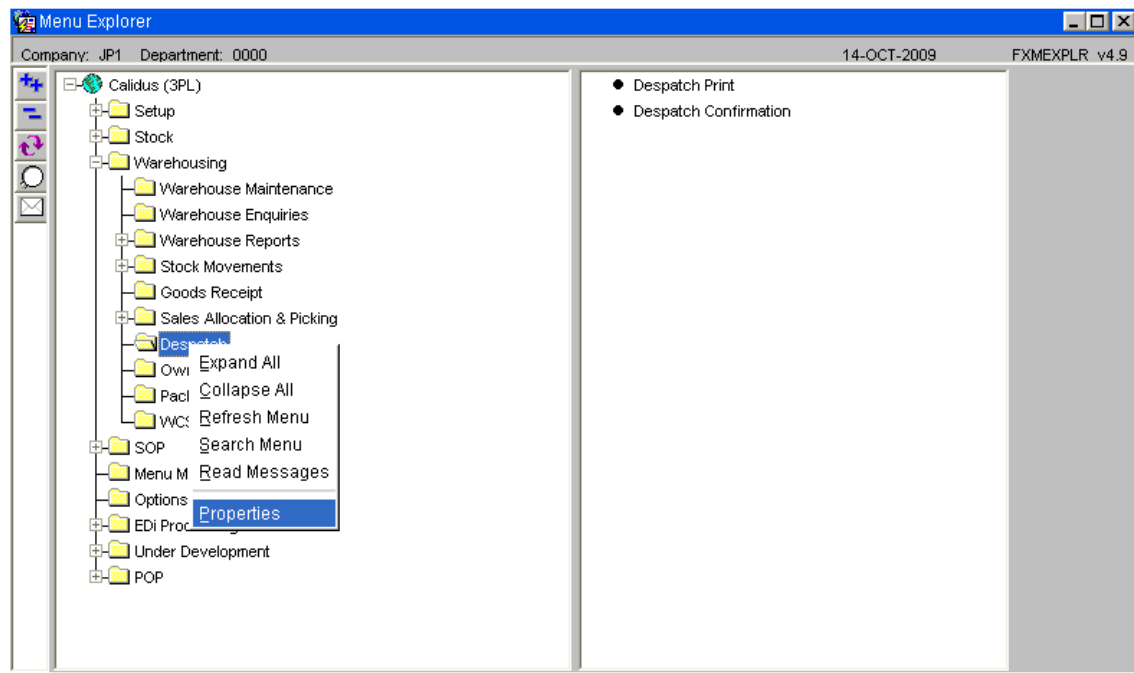

Field Name	Description	Options	Values
Label	The Label as it appears on the tab page of the screen	n/a	As per the form
Sec. Level*	The security level that will be applied to this tab page	0 - 9	0 is low; 9 is high
Screen Sec. Level	This field displays the security level of the screen on which the tab page occurs	Display	0 - 9 A reference to compare the security level being assigned to the tab page

💡 **Note:** For fields marked with '*': If all the tab pages on a screen are to have the same security level as the screen then there is no need to complete the Tab Pages information. This option will most likely be used where certain tab pages are to have a higher security level than the screen on which they occur.

1.3.2 Identifying an Existing Menu

To find out the name of an existing menu the user can right-click on the menu name within Menu Explorer to reveal a list of options. Selecting Properties from this list will reveal the Menu Node Properties, which will display the menu label as it appears in Explorer view and the name/reference by which it is known in WMS.

Ready for **What's Next, Now**™

1.3.3 Menu Options - FXMOPT

This screen allows the creation and/or amendment of menus and the options they will contain.

The user can create a new menu in entry mode or can add an option to an existing menu by finding that menu, using query mode, and adding an option.

The FXMOPT screen used to create and maintain menus is shown below:

Ready for **What's Next, Now**™

Field Name	Description	Options	Values
Menu Name	A code or name for identifying the menu	12 alpha/ numeric characters	User Defined
Description	The Name of the menu as it will appear in Menu Explorer in WMS	30 alpha/ numeric characters	User Defined
Seq	Used to control the sequence in which the items on the menu will be listed	0.0 - 99.9	User Defined
Type	Indicate the type of the item being added to the menu	A drop-down list contains valid values	FX Menu is used to add a menu option. Oracle Form is used to add a program. Free Text may be used to insert blank lines that may be used to format the menu.
Name	The name of the program or menu being added.	A valid menu name or program identifier Not applicable if Type = Free Text.	User Defined
Label	The descriptive name that will appear on Menu Explorer	30 alpha/ numeric characters	User Defined
Details			
Security Level	The security level of the item added to the menu	0 - 9	User Defined
Mode	For programs: should the screen open in Entry, Find or Query mode	Select Entry, Find or Query from a drop-down list	User Defined
Passing	For programs: Indicate if a 'Passing' command is to be associated with the screen	n/a	New forms do not require this value, any forms associated with PO will require PL and any Reports and Enquiries for SOP will require SL adding.
Common/ Value	For programs: is the passed information from common or a value	Common or Value.	User Defined
Password			
Enabled	Indicate if this option is to be controlled by a password	Yes or No	Unless entered the assumption will be that no password is required and that the user's security levels will be sufficient
Password	If Enabled = Yes then enter the password	The password will be displayed as asterisks during entry and will then	Client defined

Ready for **What's Next, Now**™

Field Name	Description	Options	Values
		be encrypted to disguise the number of characters it contains	
Command			
Command	An entry to run a program that is not part of WMS	May only be used if the Type = Command	May be the path name / location of an external program
Icon			
Filename	The filename of the icon associated with a program external to WMS	n/a	n/a
Icon	The icon associated with the filename	n/a	n/a

1.3.3.1 Copy Menu

The Copy Menu button may be used to create a copy of the currently displayed menu. The following sub-screen will be displayed:

Field Name	Description	Options	Values
Menu Name	The name of the menu being copied	n/a	Display
New Menu Name	The name to be given to the new menu	12 alpha/ numeric characters	Defined by client
New Menu Label	The descriptive name of the menu	30 alpha/ numeric characters	Defined by client

1.3.3.2 Resequence

This button can be used to re-arrange the options on a menu. When adding a new menu item it is possible to use one decimal place. This permits items to be given a number between two other options, which can then be re-sequenced to appear in the desired order on the menu. Re-sequencing will also re-number the menu options so that the insertion process should always be available.

1.3.4 Menu Building

Once the new menu has been created it will be necessary to ensure that it appears within Menu Explorer. This is done by adding the menu to another menu, thus creating a hierarchy. WMS will be supplied to the client with at least one menu level in place; thus, by using identifying the name of this menu it will be possible for the client to build a hierarchy that suits their needs. So, for example, the top-level menu of WMS will be likely contain only other menu items, as shown below:

Ready for **What's Next, Now**™

1.4 Creating a Menu Class

The creation of a 'Class' is the means of grouping a number of system users to a particular operational requirement. Only those processes, or options assigned to that 'Class' will appear in the Menu when the users log in to the system.

For example, the warehouse operators might be assigned to a class that restricts them to Stock and Warehouse Enquiries only, while the Stock Control clerks could be in a class that gave access to all Enquiries, Receipts and Issues functionality. The systems management personnel could be in a class which provided access to the whole system.

Field Name	Description	Options	Values
Class	Name of the class to be created.	10 character field	Defined by client
Description	The full name/description of the class/grouping.	30 character field	Defined by client
Security level	The appropriate security level for the group.	0 -9	0 lowest, 9 highest

Ready for **What's Next, Now**™

Field Name	Description	Options	Values
Seq	Enter the sequence in which the selected option should appear in the Main Menu.	n/a	n/a
Option	Enter the menu option to be assigned to this class. This option can be obtained from a LOV facility as it must have been previously entered onto the system through the 'Screens/Menu Options' facilities.	n/a	Defined by client
Label	Name of menu	n/a	Defined by client
Buttons			
Copy Class	Will copy the class allowing	n/a	n/a
Resequence	Allows the display order to be changed within the main tree structure	n/a	n/a
Refresh Tree	Saves and updates any changes made	**Any changes made must be refreshed**	n/a

💡 **Note: A new option can be inserted between existing options by the use of decimal points. For example, should a new option be required in the above screen between existing options sequentially numbered 5.0 and 6.0 it can be sequenced as 5.5.**

1.5 Sample Menus

The system is delivered with a number of menu structures to help with the initial data setup and configuration.

Role	User Name	Password	class
Super user	SUPONE	SUPONE	SUP_WHS
Goods In	GOODSIN	GOODSIN	GOOD_WHS
Goods Out	GOODSOUT	GOODSOUT	OUT_WHS
Shift/Inventory Managery	MANAGER	MANAGER	MAN_WHS

Ready for **What's Next, Now**™